

## Approving an Invoice for an Encumbered Payment (Allocating Additional Funds Example)

This guide is designed for approvers in myUF Payment Solutions. To complete the process described below, you must have the UF\_SY\_BUSUNIT\_UFLOR role *and* either the UF\_AP\_Reviewer *or* UF\_AP\_Approver security role in myUFL. For a complete coverage of content and skills related to myUF Payment Solutions, please see the following online course: PST970 myUF Payments for Approvers.

To access myUF Payment Solutions, use the following steps:

- Visit <http://my.ufl.edu>
- Click the Access myUFL button
- Enter your GatorLink username and password
- Click the Login button
- Click **Main Menu > My Self Service > myUF Payment Solutions**

In this guide, you will encounter an invoice for an encumbered payment. You will allocate additional funds to an unmatched portion of the invoice (in this case for shipping charges). You will then approve the invoice.

1. Click the **Work Invoice** icon.
2. Notice that the amount to be paid for this invoice is \$654.32. Only \$640 is currently allocated. Why is there a remaining \$14.32? Let's investigate by reviewing the Line Items tab and the imaged invoice.



3. Click the **Line Items** tab.
4. Here we find that the invoice matches line #1 of the purchase order. Therefore, \$640 of the amount has been appropriately allocated.

Matched																	
Level	Type	PO #	Line #	Item Description	Qty	Unit Price	Tax	Amount	UM	Multiplier	Qty Avail	Invoice Qty	Unit Price	Tax	Amount	Invoice #	Actions
	Receipt	1400267774	1	CYTOPLAST Membrane Titanium 12mmx20mm	2	270	0	540	EA	1	2	2	320	0	640.00	D100448562	
															<b>\$640.00</b>		

5. Let's check the imaged invoice to find out more about the extra charge of \$14.32. Scroll to the bottom of the invoice.

If you notice the invoiced image is difficult to read you can make the imaged invoice bigger.



Use the following options to improve the readability of the imaged invoice:

- The **New Window** button opens the imaged invoice in full-screen mode (if you need to take a closer look).



- Another option is to use the **Zoom** buttons to adjust your view of the imaged invoice.



6. Because this \$14.32 was not included in the original purchase order, you'll need to allocate it now.
7. Click the **Allocations** tab.
8. Click the **Business Unit** dropdown menu and click the **UFLOR** list item.
9. Input ChartField information.
10. Scroll to the beginning of the line and click the **Save** icon.
11. The full amount is now listed as **Allocated**.

Amount:	654.32	Allocated: 654.32 Remaining: 0.00
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12. Click the large **Save** button.

**NOTE:** If this were an invoice charged to a Foundation Funding Source (Fund 171 *and* Source FXXXXXXX), you have two options:

- You would need to route the invoice manually to the Fund Administrator for approval *or*
- Departments approve the invoice and upload a signed UFF PA form.

13. Provided that all ChartField information is correct, the **Approve** button (green checkmark) will become active. If there are issues with the invoice, hovering your mouse over this icon will reveal the updates to make prior to approval. Click the **Approve** button.

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If you need help with...

- Technical issues, contact the UF Help Desk:
  - 392-HELP(4357)
  - [helpdesk@ufl.edu](mailto:helpdesk@ufl.edu)
- Procedures, Policies and Directives, contact University Disbursements:
  - 392-1241
  - [Disbursements@ufl.edu](mailto:Disbursements@ufl.edu)