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## Reviewing the Invoice Header

This guide is designed for reviews and 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 appropriate online course for your role in the system: PST967 myUF Payments for Reviewers or 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**

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1. At the Inbox, select your invoice and click the **Work Invoice** button in the row of the invoice needed.
  2. The Invoice is made of six parts:
    - The Imaged Invoice
    - Invoice Image Annotation Toolbar
    - The Header
    - The Approval/Action Bar
    - The Allocations Tab
    - The Line Items Tab
  3. The header contains the following information:
    - COR360 Voucher Number
    - Invoice Number and Date
    - Total Amount
    - PO Number
    - Vendor Number, Name, and Address

You may use the invoice header to enter a Reason Code or receive an asset, if necessary.

The COR360 Voucher Number will export with the approved invoice information to myUFL. Search for it in myUFL via Accounts Payable > Find an Existing Voucher and replace the first digit with a "P" to obtain the voucher number. *Therefore, 10000028 in myUF Payments would be P0000028 in myUFL.*

The Invoice Number is the number on the imaged invoice.

4. The **Amount** is shown in the Header along with the following:
  - Allocated
  - Remaining

Once the invoice is complete and saved, the **Remaining** value should be 0.00. Check the Allocations ChartField line amounts if this does not appear as 0.00 once saved.

5. The header will contain the **PO Number** of the purchase order that matches the invoice and is used solely for routing purposes. In order to add the PO to the voucher, one or more lines must be matched.
6. If the total amount being paid is different from the Total Amount in the imaged invoice, add a **Reason Code** by clicking the dropdown.
7. For this example, click the **Freight Not Allowed** list item.
8. To provide additional information about assets received, you would check the **Asset Purchase** checkbox. Checking this box would reveal additional fields to complete.

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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)