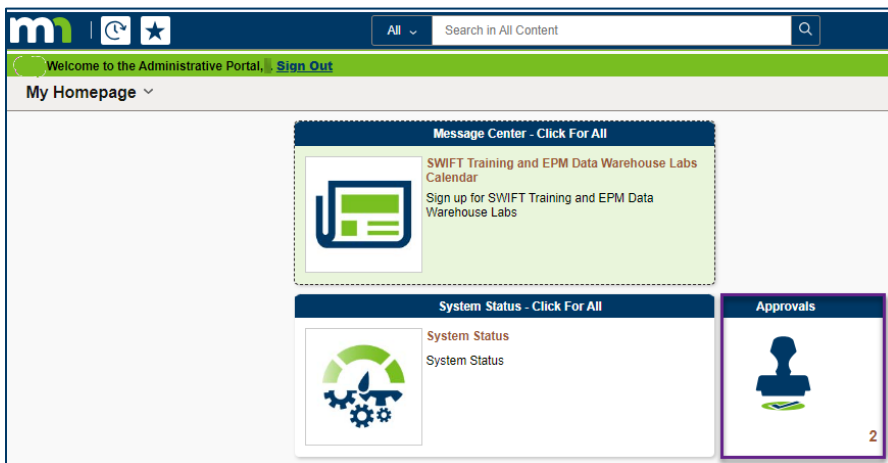## QUICK REFERENCE GUIDE

February 20, 2024

Voucher Approval

This Quick Reference Guide provides steps to find and approve, deny, or request more information for vouchers in SWIFT.

Step 1: Access the Approvals tile

1. From the Administrative Portal, select the **Approvals** tile.

2. SWIFT displays the Pending Approvals page. From the left-menu, select the **Voucher** category. On the right side of the page, select the voucher to approve from the Voucher list.
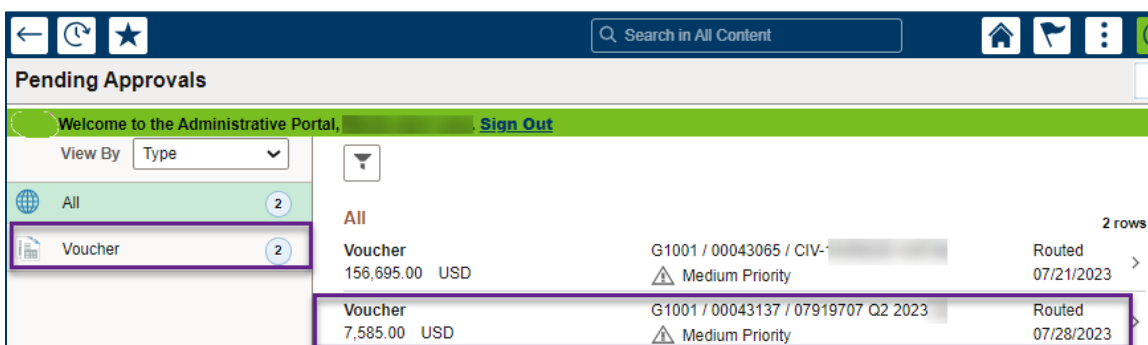
Step 2: Review the voucher for approval

SWIFT displays the Voucher page. Review the information to ensure the voucher is correct.

- At the top of the header, you can see the **Approve, Deny,** and **Request Information** buttons.
- The **Summary** section contains information from the header such as supplier and dates.
- You can select the **View Voucher** link to see more information about the voucher.

- The **Voucher Lines** section shows how many lines, a description of the purchase, how many were purchased, the merchandise amount and ChartField information.
- In order to approve, deny or request information on the voucher line, select the box next to the line.

Step 3: Approve, Deny, or Request Information

Approve

1. To approve the voucher, check mark the line(s) under the Voucher Lines section, and then select the **Approve** button in the header of the page.
2. The Approve window displays. Leave any **Approver Comments**, if applicable.
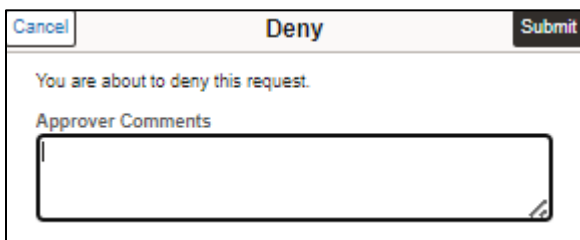3. Then, press the **Submit** button.

Deny

1. If the voucher or line cannot be approved, check mark the line(s) under the Voucher Lines section. Then, press the **Deny** button in the header of the page.
2. The Deny window displays. Enter the reason for denial in the Approver Comments.

NOTE: Approver comments are required when an approver denies a voucher. SWIFT sends an alert to the requester that the voucher was denied.

3. Press the **Submit** button.

Request Information

1. If you need more information about the voucher or line before you can approve the voucher, check mark the line(s) under the Voucher Lines section. Then, press the **Request Information** button in the header of the page.
2. The Request Information window displays. Enter comments to request information about the voucher in the Approver Comments.

NOTE: Approver comments are required when an approver requests information.

3. Press the **Submit** button.