Supervisor / Reviewer Approval Guide

After the cardholder verifies the purchase, their supervisor must approve. Similar to the verify process, the approval is submitted through PeopleSoft Financials.

The supervisor receives an email notification from PeopleSoft stating a transaction is awaiting approval after the cardholder verifies the transaction. The email is sent daily until the transaction is approved. The transaction must be approved within five days of the initial email. A link is provided in the email leading the supervisor to the approval page.

Besides through the email’s link, the supervisor can access the transaction by going to the following PeopleSoft navigation: Purchasing – Procurement Cards – Reconcile – Reconcile Statement. Once on the reconcile statement page, select the search button. The transactions needing approval have a Verified status. One can also select the Worklist link on the top of the page in PeopleSoft to access the transaction.

Prior to approving, the supervisor must review the following:

- The transaction has an appropriate business purpose and is in compliance with all purchasing rules and regulations, and UNO and the State’s Corporate Liability Purchasing Card policy.
- The charge is not a duplication of personal request and/or reimbursements.
- The correct account number and speed key is entered (chartfield combination is valid).
- In the comment section, a comment is entered describing the charge and an itemized receipt, signed P-Card Log, and Pre-Approval Form is uploaded. A new comment can be added if needed, but a comment should never be deleted.
- The receipt’s purchase amount matches the transaction amount.

The transaction can be approved if all the requirements above are met. To approve, the supervisor must change the “Status” column’s drop down menu to “Approve” and “Save”. See the screen shot on the following page.
If one of the items above is not sufficient, the transaction should not be approved. Some issues causing a non-approval may be corrected in PeopleSoft, such as changing the account number, speed key or adding a comment or receipt. The supervisor must contact the cardholder to inform them of the error. The Coordinator for Card Services or Program Administrator can correct data in a transaction. What needs to be corrected should be requested in written (email).

If a transaction does not fall within all purchasing rules and regulations, and UNO and the State's Corporate Liability Purchasing Card Policy, the transaction cannot be approved, and the Coordinator for Card Services must be notified. In instances of card misuse, the cardholder will have two pay periods to resolve the matter or the amount can be deducted from cardholder's paycheck, and the card can be revoked.