Quick Reference Card – Subaward Online Invoice Process

PI Subaward Online Invoice Approval Process

Process: To approve an online subaward invoice for payment based on email notification through the workflow process.

PROCEDURES

Click on the link listed in the notification email to access the invoice.

NOTE: The email notification is only sent when the invoice is initially routed for certification. The invoice can be accessed either by the original email notification or by going directly to the workflow through the portal.

After directed to the workflow tab, click on the “Approve Subaward Invoice XXX with Value XXX” on the task list that matches the email, and then click process invoice at the bottom of the screen.

Note: If you are not logged in to SAP, the system will prompt you to log on, then direct you to the workflow tab.
Review the relevant information on the screen related to the purchase order and account to which the invoice relates, and then double click on the invoice listed under the description column as shown below.

After double clicking on the invoice, the following message will appear. Select Adobe Reader from the “Open with” list if prompted, and then click the OK button.

Note: To avoid this prompt in the future, click the check box for the “Do this automatically…” selection.
Review the invoice for reasonableness, and when ready to approve close the window to go back to the approval screen.

Note: See PI Hold QRC for instructions if questions arise during review.
When the invoice is ready for certification, click the approve button at the top of the screen.
Ensure the certification statement is accurate, then click the “Yes” button.

This is the last step of the certification process. Once the “Yes” button is selected, the block will be released and payment initiated through SAP.

Note: The invoice must be certified within 30 calendar days of the Receive Date listed on the approval screen unless there is a valid hold reason.