## Non PO Voucher eForm

This topic shows how Medical School users will complete and submit an ImageNow eForm to request a Non PO Voucher.

A link to access this eForm can be found on the web site for the Medical School Office of Finance.



| **Step** | **Action** |
| --- | --- |
| 1.
 | When you click the link for eForms, the **Non PO Voucher eForm** appears in the Voucher Header by default.If needed, use the right side of the **Voucher Header** to select the **Non PO Voucher** eForm.Click the **Voucher Type** dropdown button to activate the menu. |

| **Step** | **Action** |
| --- | --- |
| 1.
 | Click the **Non PO Voucher** list item. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Click the **Transaction Business Unit** dropdown button to activate the menu. |

| **Step** | **Action** |
| --- | --- |
| 1.
 | Select the **UTHSC** or the **UTP** business unit as needed.Click the **UTHSC** list item. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Enter your full name in the **Entered By:** field.Enter the desired information into the **Entered By:** field. Enter "**Sample User**". |

| **Step** | **Action** |
| --- | --- |
| 1.
 | Enter your area code and work telephone number.  No special characters are needed here.Enter the desired information into the **Entered By Phone Number:** field. Enter "**7135001234**". |

| **Step** | **Action** |
| --- | --- |
| 1.
 | Your phone number is formatted when you move to the next field on the eForm.Enter the name of the department where you work.  This may not necessarily be the same as the department used in the ChartField String.  Enter the desired information into the **Department Name** field. Enter "**Psychiatry**". |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Enter the 10-digit **Vendor ID** or use the **Look up Vendor ID** button to search for a vendor/supplier.This example will demonstrate both search methods.Enter the desired information into the **Vendor ID** field. Enter "**0000014481**". |



| **Step** | **Action** |
| --- | --- |
| 1.
 | When you enter the **Vendor ID** and move to the next field, or click the Look up Vendor ID button, the **Vendor Search** pop-up window appears with address options for the vendor.Double-click the vendor address to which payment should be sent (or click the address and click Ok).Double-click an entry in the **Vendor Search** rows. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Next the **Vendor Location** pop-up window appears with one or more location options.Because Vendor and Address Sequence Number (selected on the previous search screen) will be used to build the voucher and to populate Payment Address and Payment Method, you can usually choose "MAIN" as the Location on the Location selection screen.The exception to selecting "MAIN" is when a different payment method is required (i.e., CHECK, EFT, WIRE) for your transaction.  For instance, when sending research-related payments from UTH to UTP, the location is not the "MAIN" location, but is one that lists "CHECK" as the Payment Method.Double-click an entry in the **Vendor Search** rows. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | The selected vendor ID, name, and address display under **Vendor Information**. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Now see another way to search for a vendor/supplier.Click the **Look up Vendor ID** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | A blank **Vendor Search** pop-up window appears where you can search by vendor name or ID.Enter the desired information into the **Input Vendor** field. Enter "**American College of Psychiatrists**". |

| **Step** | **Action** |
| --- | --- |
| 1.
 | Click the **Go** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | The **Vendor Search** pop-up window appears with address options for the vendor.Double-click the vendor address to which payment should be sent (or click the address and click Ok).Double-click an entry in the **Vendor Search** rows. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Next the **Vendor Location** pop-up window appears with one or more location options.Because Vendor and Address Sequence Number (selected on the previous search screen) will be used to build the voucher and to populate Payment Address and Payment Method, you can usually choose "MAIN" as the Location on the Location selection screen.The exception to selecting "MAIN" is when a different payment method is required (i.e., CHECK, EFT, WIRE) for your transaction.  For instance, when sending research-related payments from UTH to UTP, the location is not the "MAIN" location, but is one that lists "CHECK" as the Payment Method.Double-click an entry in the **Vendor Location** rows. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | The selected vendor ID, name, and address display under **Vendor Information**.Enter the vendor's **Invoice Number** exactly as it appears on the bill; spaces and special characters are allowed.Enter the desired information into the **Invoice Number** field. Enter "**12345**". |



| **Step** | **Action** |
| --- | --- |
| 1.
 | **Invoice Date** is not an input field.  Click in the **Invoice Date** field, or click the **Calendar** button to select a date from the pop-up calendar.Select the date on the vendor's invoice or use today's date if no date is provided.Click the **Calendar** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Scroll to the desired month/year.Click the **Previous/Back** button. |

| **Step** | **Action** |
| --- | --- |
| 1.
 | Select the date for the selected month/year.Click the **Aug 10** object. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Close the calendar pop-up window when the correct Invoice Date displays in the field.Click the **Close Calendar** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Enter the total amount of the invoice.Enter the desired information into the **Invoice Amount** field. Enter "**2000**". |

| **Step** | **Action** |
| --- | --- |
| 1.
 | The **Invoice Amount** is formatted when you move to the next field.In the **Voucher Line Detail** section, enter the appropriate **Line Description, ChartField String,** and **Amount**. As needed, click the **(+) Add a New Row** button to add additional voucher lines and enter the details.Click the **Vertical** scrollbar. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Once you have input all of the information on the eForm, click the **Validate** button to check for any errors.(In this example, the voucher line detail has been entered with an incorrect amount.)Click the **Validate** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | If needed, correct any errors or click the **Reset** button and re-enter the eForm data. Then validate the eForm again.(In this example, we are correcting the voucher line detail amount.)Enter the desired information into the **Amount** field. Enter "**2000**". |

| **Step** | **Action** |
| --- | --- |
| 1.
 | Click the **Validate** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | After you have successfully validated the eForm information, attach the supporting documentation.Click the **Attachments** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Click **Add** to search for and attach the supporting documentation for the transaction.  Once all required file(s) are displayed in the **Attachments** pop-up window, click OK.Click the **OK** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Notice the **Attachments** button indicates the number of files attached to the eForm.Click the **Acknowledge radio button** option. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Optional:  Use the **Print** button to get a copy of the completed eForm.The last step is to submit the eForm.Click the **Submit** button. |



| **Step** | **Action** |
| --- | --- |
| 1.
 | Once the eForm is submitted, a confirmation message appears. |

| **Step** | **Action** |
| --- | --- |
| 1.
 | You have successfully completed this topic.**End of Procedure.** |