When to do

Once a voucher has been fully approved AND posted or paid by a campus user in ConnectCarolina, the voucher can no longer be deleted. It must instead be closed. This document explains how to close a voucher.

Requesting to delete or close a voucher in order to stop it from processing should be an exception rather than the norm. Your normal due diligence in entering requests for payment will usually prevent you from needing to stop vouchers from processing.

How to do

Depending on the status of the voucher, do the following to ensure it is not processed:

- *Voucher saved but not budget checked.*

    o Delete the department from the chartfield string to create a combo edit error. This will prevent the voucher from submitting into workflow.

    o Click OK on the subsequent messages, and contact Disbursement Services to delete voucher.

- *Voucher has been budget checked but not submitted to workflow.*

    o Delete the department from the chartfield string to create a combo edit error.

    o Save the voucher. The system displays a warning about an invalid combo code. This will prevent the voucher from submitting into workflow.

    o Click OK on the subsequent messages, and contact Disbursement Services to delete voucher.

- *Voucher has been budget checked and submitted for approval but has not passed all approvals.*

    o Ask the approvers at the current approval level to deny the voucher.

    o Once the voucher is denied, contact Disbursement Services to delete voucher. At this point, it can no longer be deleted.

- *Voucher has been fully approved but voucher is not posted or paid.*

    o Contact Disbursement Services to close voucher.

Contact

If you have questions about closing vouchers, contact Janet Rupert in Disbursement Services.

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