

Instructions for SOA eForm for PO Vouchers (\$1,500 - \$10,000)

Need help?

Contact SOA Reconciliation
734-615-2000 press 3, press 1
soareconciliation@umich.edu
M-F, 8:00AM-5:00PM

Use the SOA eForm to certify that a good or service was received and that the ChartFields and amount are correct. You may also use the eForm to provide the Shared Services Center (SSC) with supporting documentation for PO voucher transactions between \$1,500 and \$10,000 (if applicable – for example, a packing slip). Note: an asterisk * next to a field indicates that it is a required field to submit the form.

Step 1: Select the type of support

- * Select type of support ?
- PO Voucher - Between \$1,500 and \$10,000
- External Hosting ShortCode - greater than \$75

1. Select the **PO Voucher - Between \$1,500 and \$10,000** radio button under **Select type of support**. Additional required and optional fields display after selecting the button.

Step 2: Complete the eForm fields

* Select type of support ?

PO Voucher - Between \$1,500 and \$10,000

External Hosting ShortCode - greater than \$75

* PO number ?

0123456789

* Certification ?

I certify receipt of any goods and/or services and that the chartfields and amount are correct.

Multiple shipments/invoices

The PO has multiple shipments/invoices

Supplier

biomet

ShortCode

12345

Dollar amount

123.99

2. Enter the U-M purchase order number in the PO number field (required).
3. Confirm receipt of the good(s) or service(s) by checking the box in the Certification field (required).
4. Check the box in the Multiple shipments/invoices field (if applicable).
5. Enter the name of the vendor in the Vendor field (optional).
6. Enter the ShortCode (optional).
7. Enter the Dollar amount (optional).
8. Enter any additional information in the Comments field (optional).

Step 3: Attach Supporting Documents (if applicable, such as a receipt and/or attendee list)

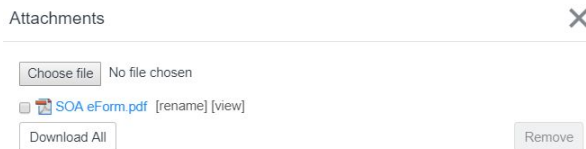


1. Click the paperclip icon located in the upper right section of the eForm. The **Attachments** pop up window will then display for your use.



2. Click **Choose file** to locate the document file(s) on your computer. Select the file from your computer to attach and click **Open**. Click on **OK** when you get the confirmation (not shown).

Note: to attach additional documents, repeat step 2 above.



3. The filename displays in the Current file attachments section.

4. Click on OK when you get the confirmation. (not shown)

Note: If you selected the incorrect file to attach, check the box next to the filename and click **Remove**.

Step 4 Submit the eForm



To send the eForm information and any attachments to the SSC, click the Submit button located at the bottom right of the eForm: