AP-28 Approve or Reject Invoices

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Approve or Reject Invoices in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to Approve or Reject Invoices in NCFS.

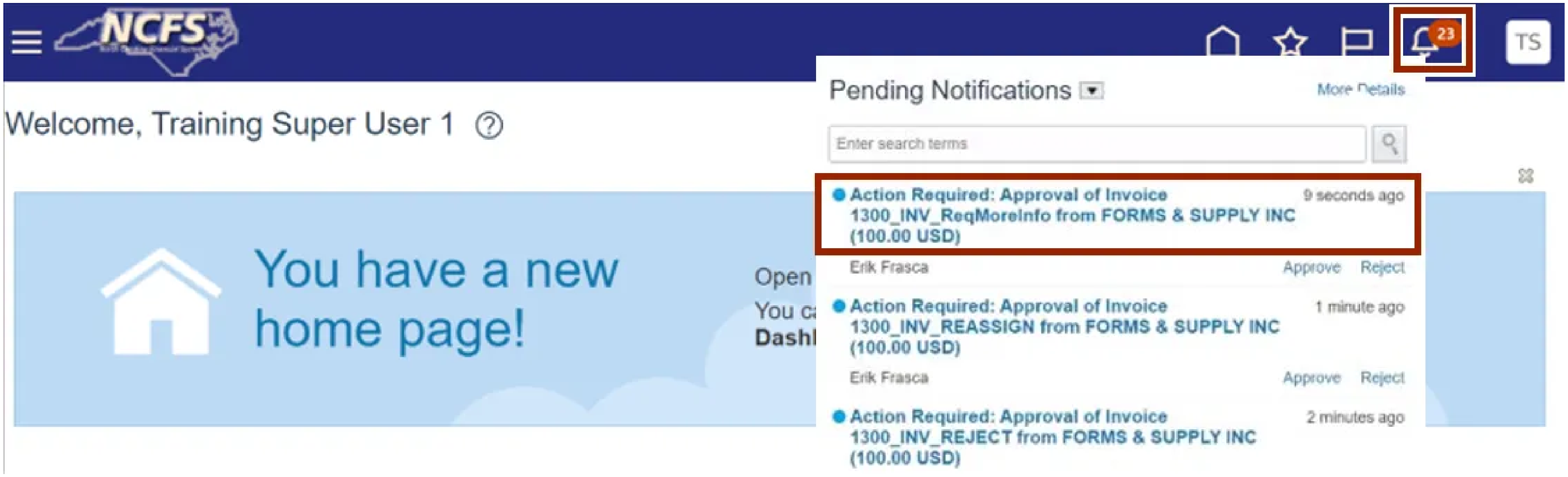
Approve Invoices

To Approve Invoices in NCFS, please follow the steps below. There are 5 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

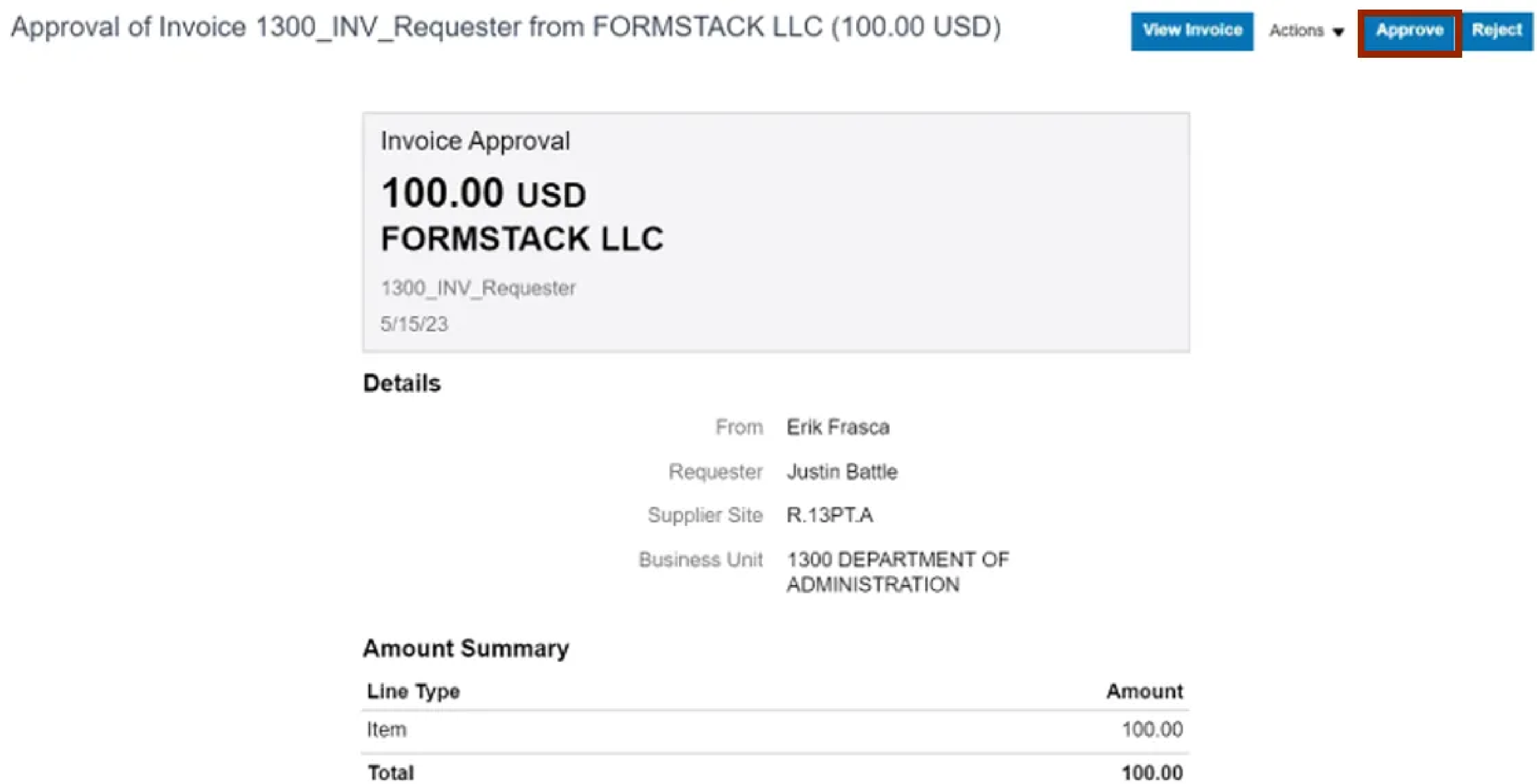
Step 2. On the **Home** page, click the **Notifications** icon and select the required notification.

Image



Step 3. The *Approval* pop-up window appears. Click the **Approve** button.

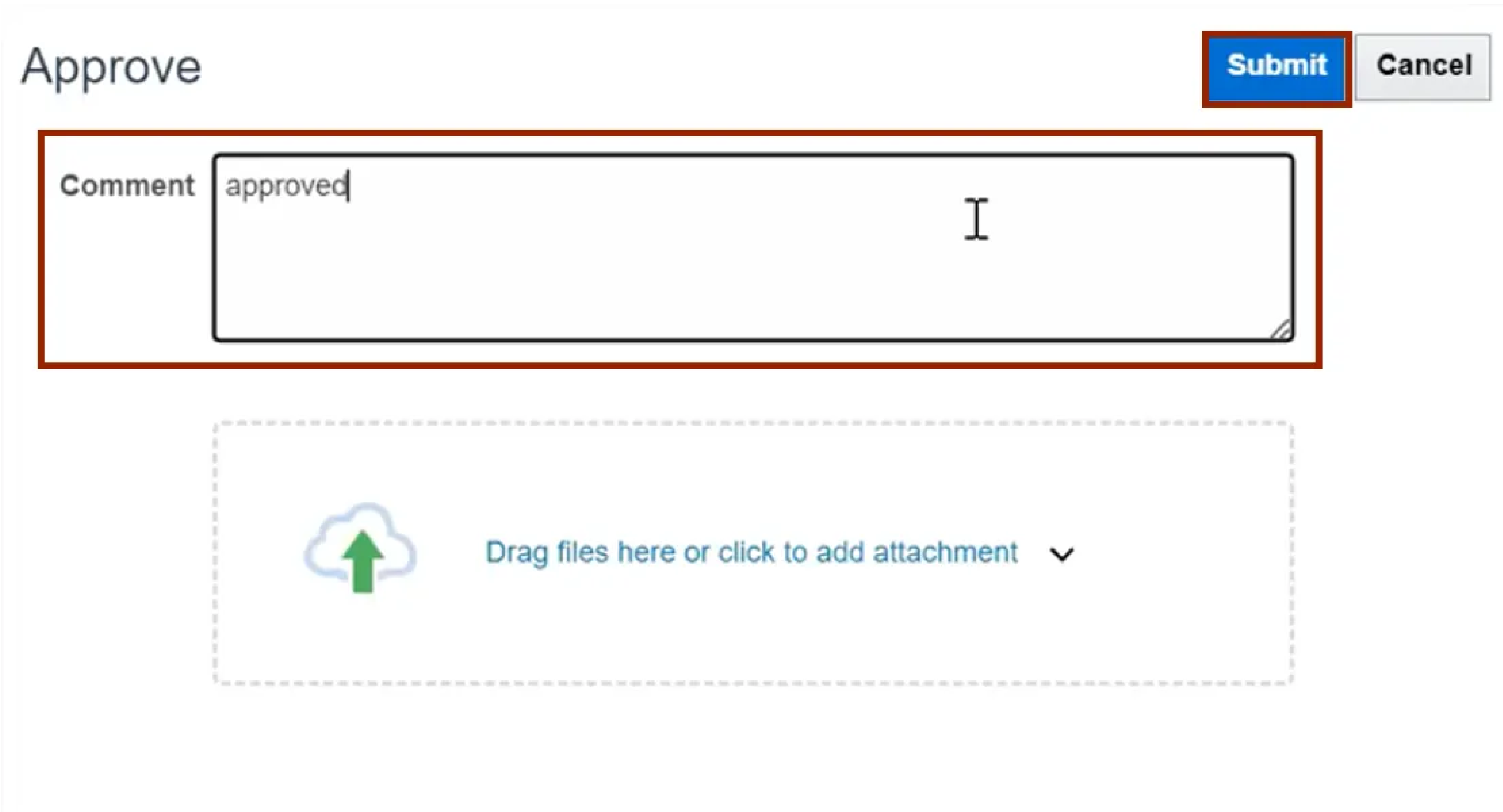
Image



Step 4. The *Approve* pop-up appears. Enter a **Comment** if required and click the **Submit** button. The Invoice is Approved.

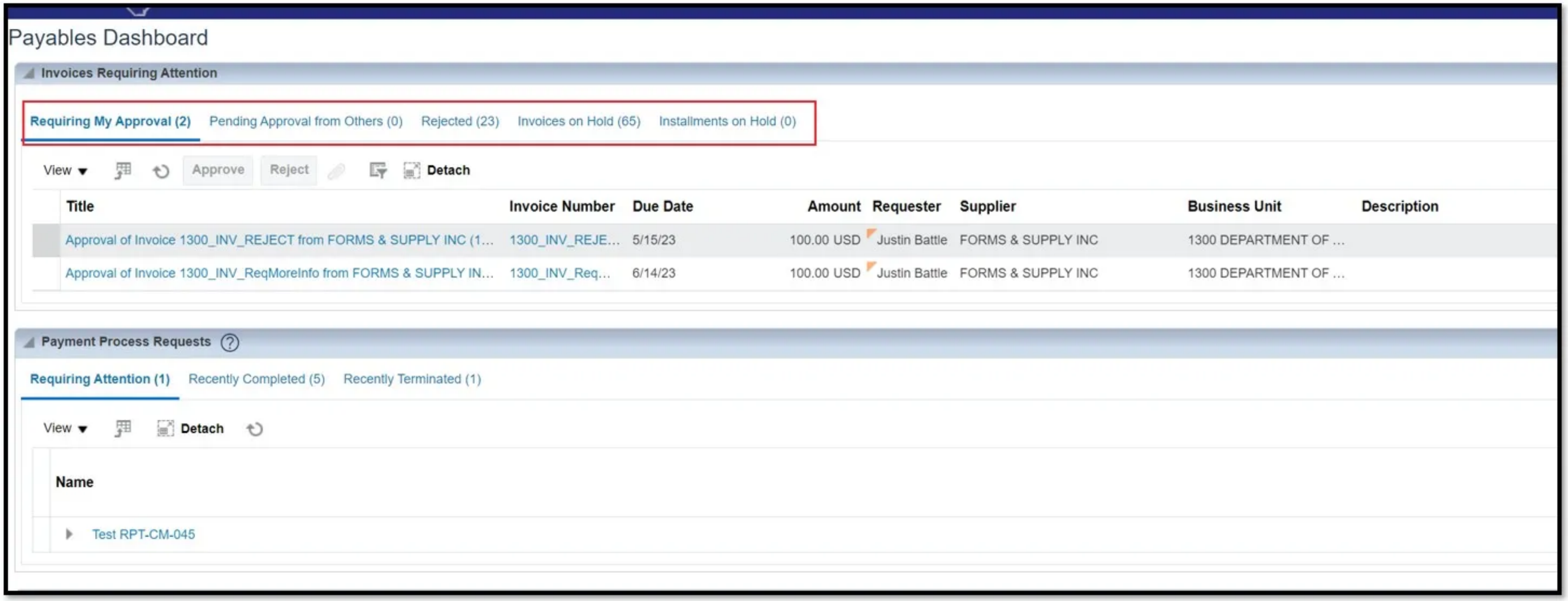
Note: Comments for approving an invoice is optional.

Image



Step 5. Users can also navigate to **Home** page > **Payables** tab > **Payables Dashboard** to view the list of Invoices requiring attention and Approve or Reject from here.

Image



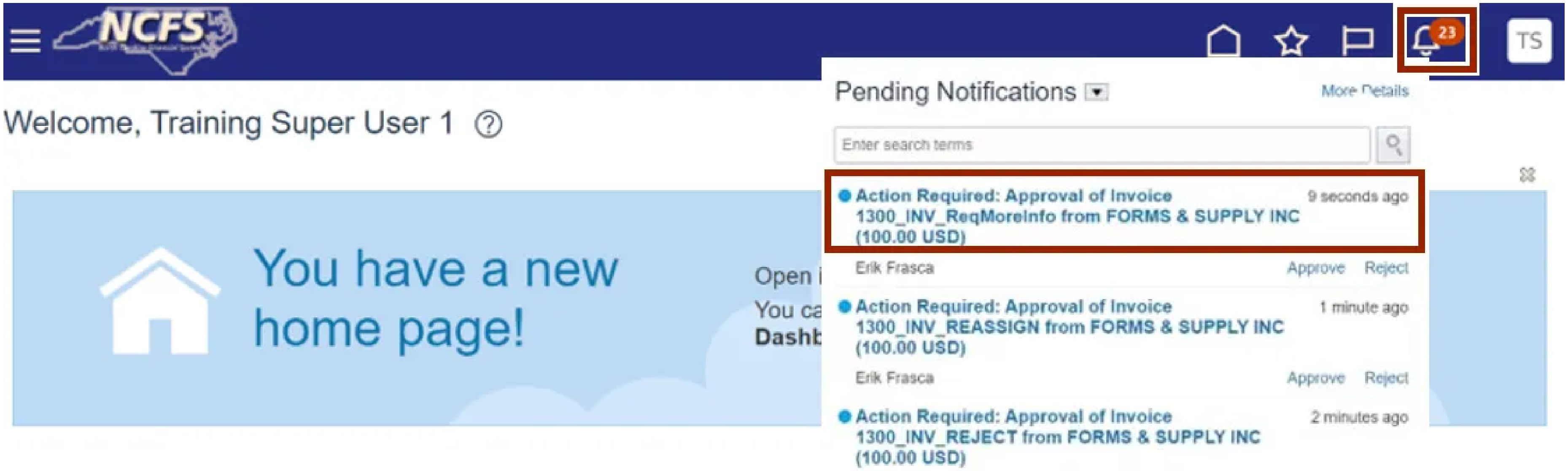
Reject Invoices

To Reject Invoices in NCFS, please follow the steps below. There are 4 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **Notifications** icon and click on the required notification.

Image



Step 3. The *Approval* pop-up appears. Click the **Reject** button.

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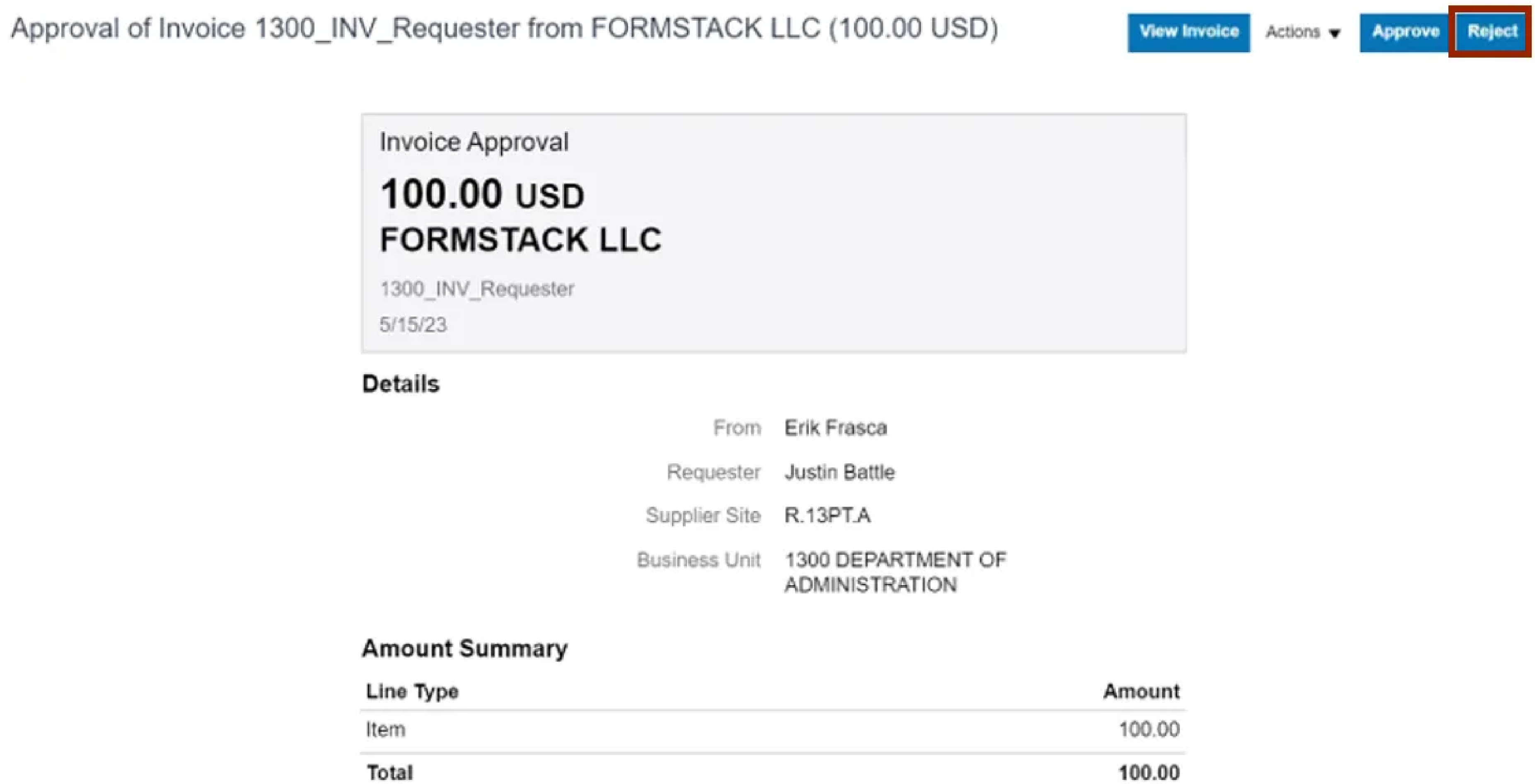

Step 4. The *Reject* pop-up appears. Enter a **Comment** as required and click the **Submit** button. The Invoice is Rejected.

Note: The Comment is optional but it is encouraged to add the reasons for rejection.

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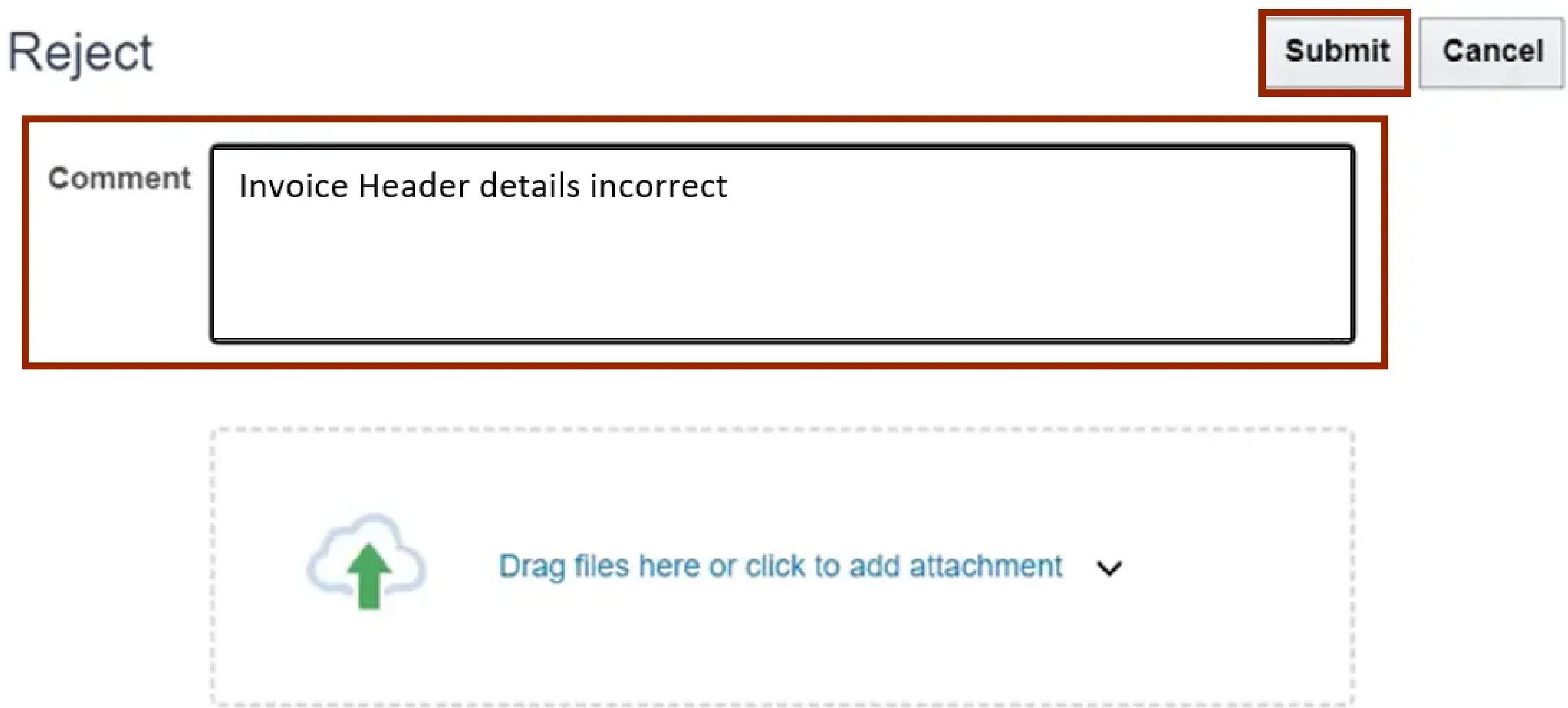

Request Additional Information

An approver can send an invoice back to the requestor if adequate details are not mentioned in it. Complete the following steps to request for additional information. There are 4 steps to complete this process.

Step 1. On the **NCFS Home** page, click the **Notifications** icon. Select the required notification.

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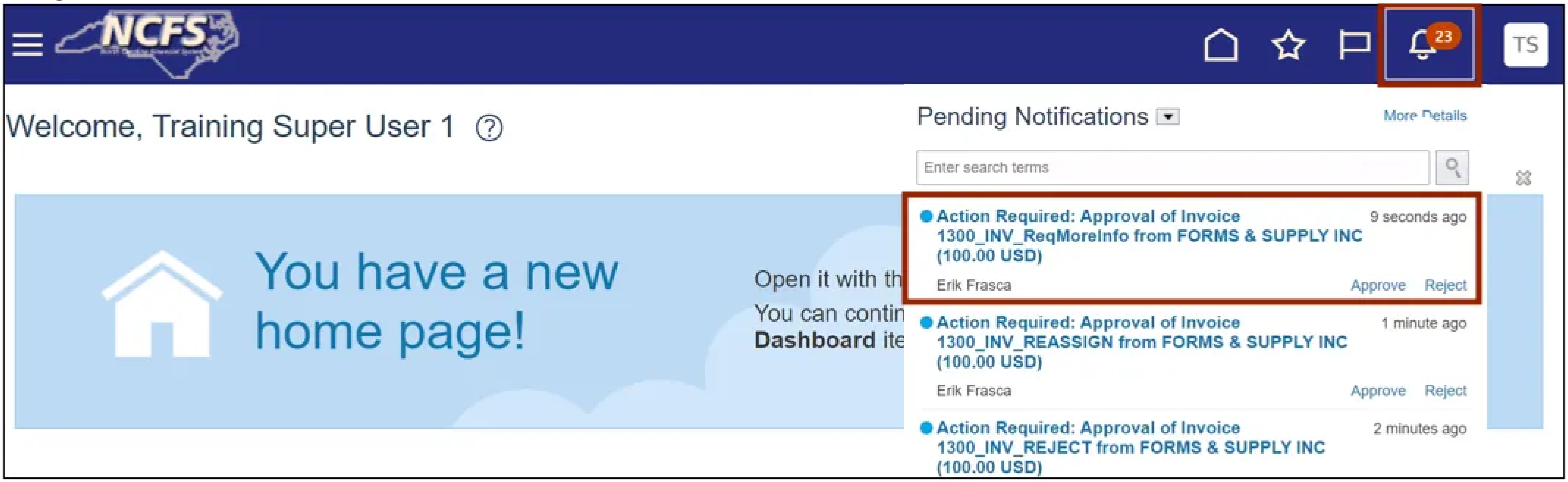
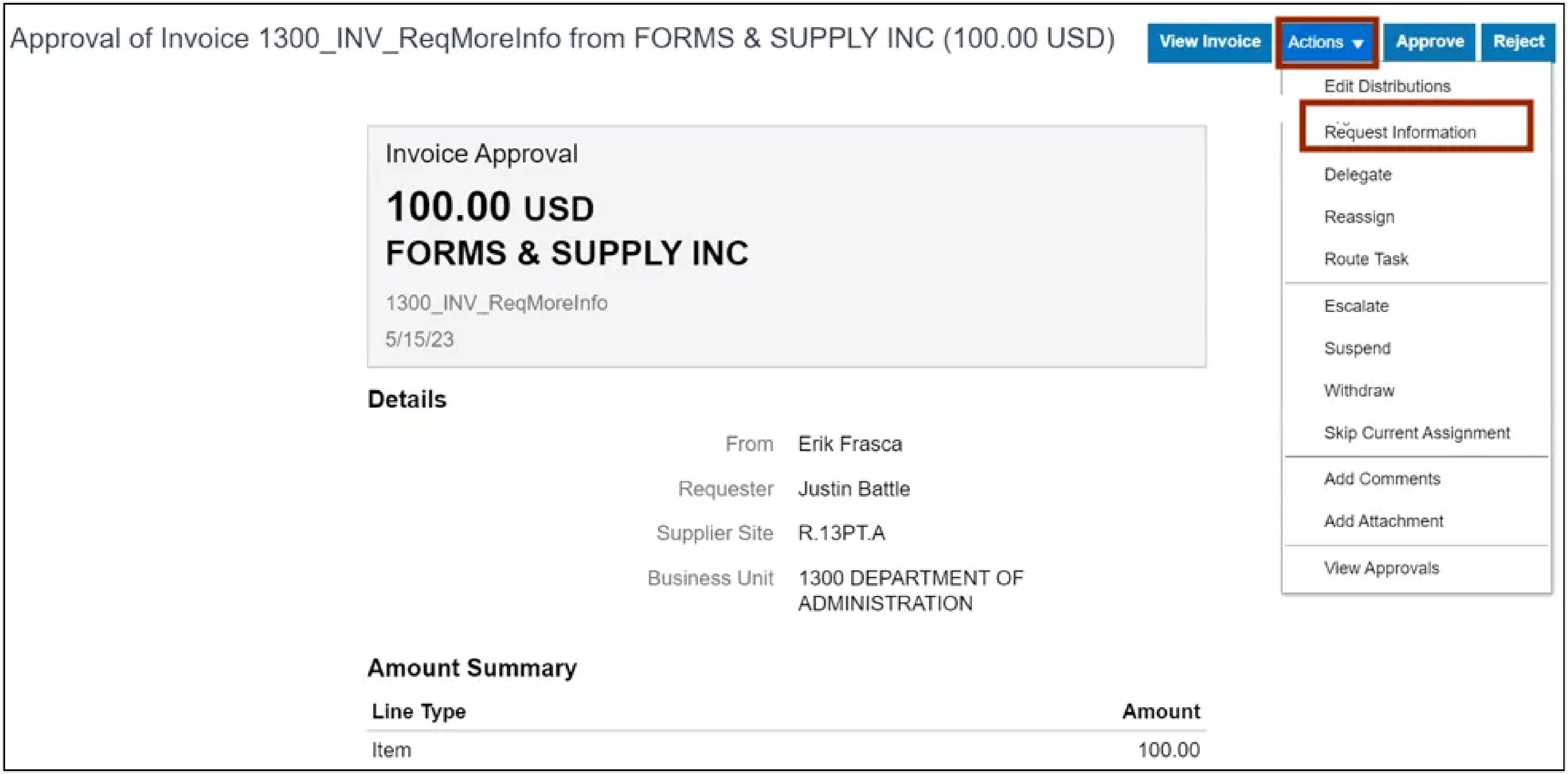


Step 2. The *Approval* pop-up window appears. Click the *Actions* drop-down choice list button, select **Request Information**.

Image



Step 3. The *Request Information* pop-up window appears. Enter the **Name** of the user from whom additional information is required. Enter a **Comment** mentioning the required information.

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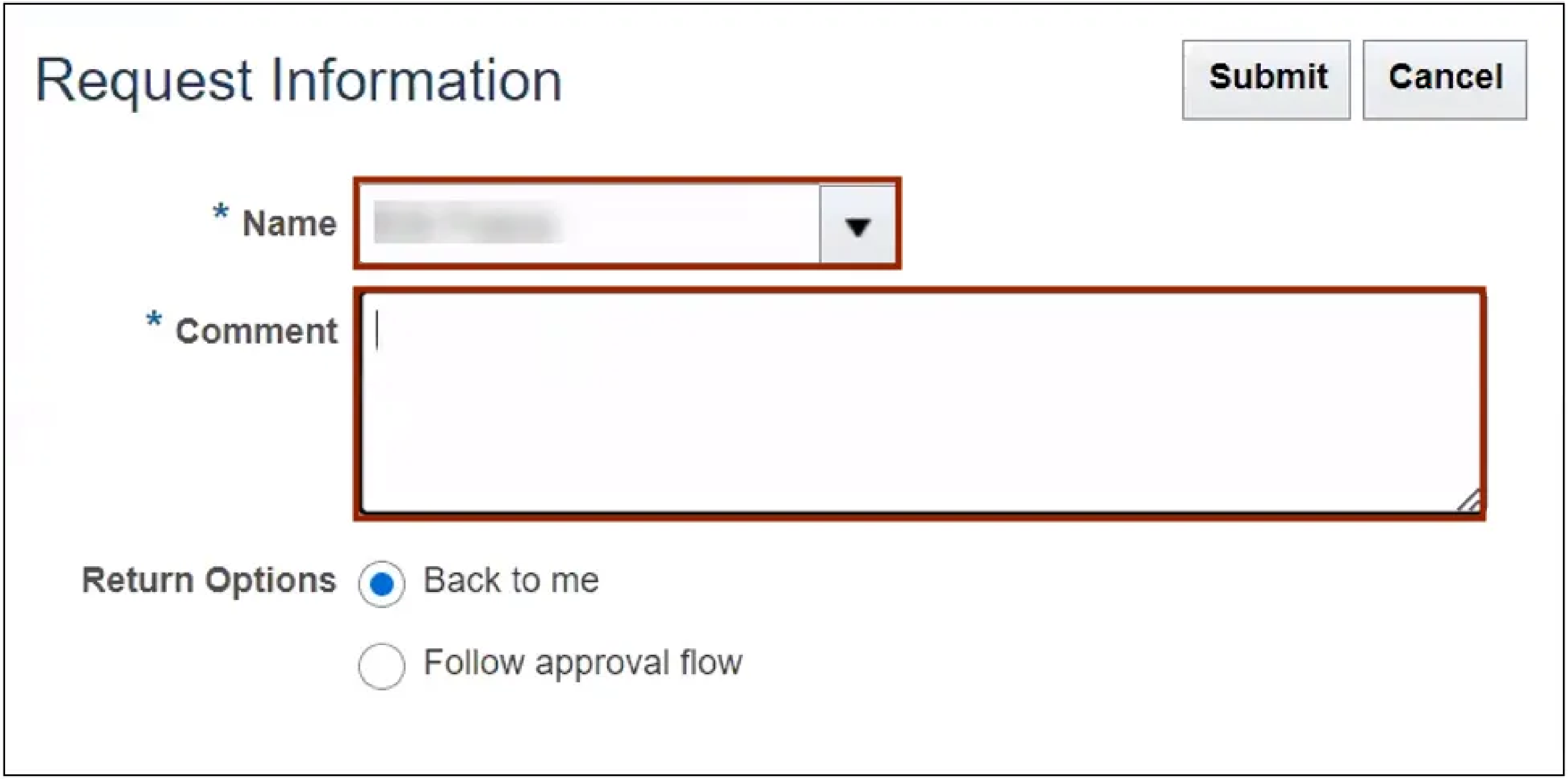

Step 4. Select the required **Return Options** radio button. Click the **Submit** button.

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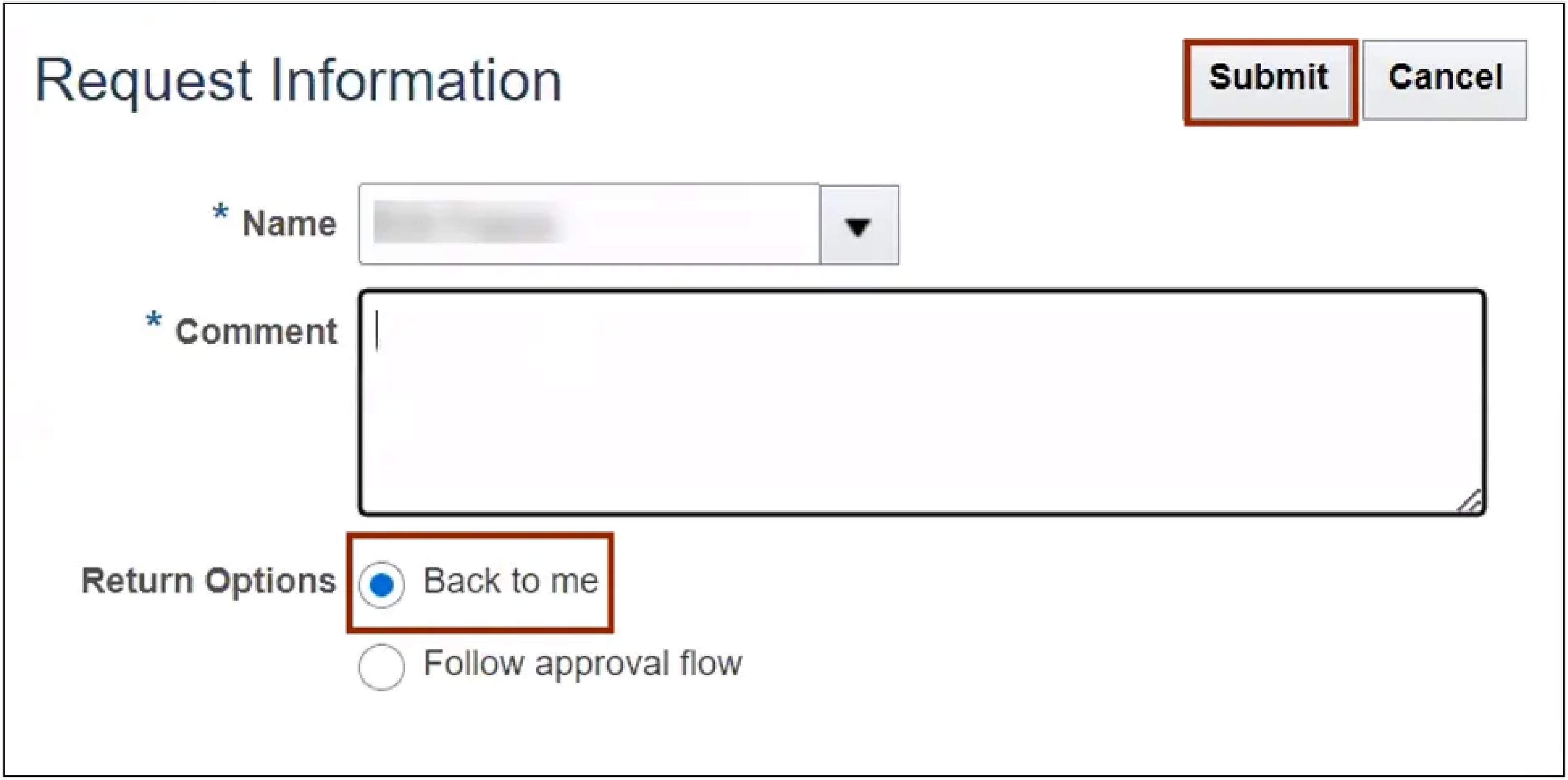

Wrap-Up

Approve or Reject Invoices using the steps above. The Invoice Approver must approve or reject an invoice sent to a requestor/employee supervisor for approval in the event of invoice not getting auto approved.

Additional Resources

- Virtual Instructor-Led Training (vILT)

  - AP101: Invoice Management

First Published

Thu, 07/27/2023

Last Updated

Mon, 08/25/2025

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