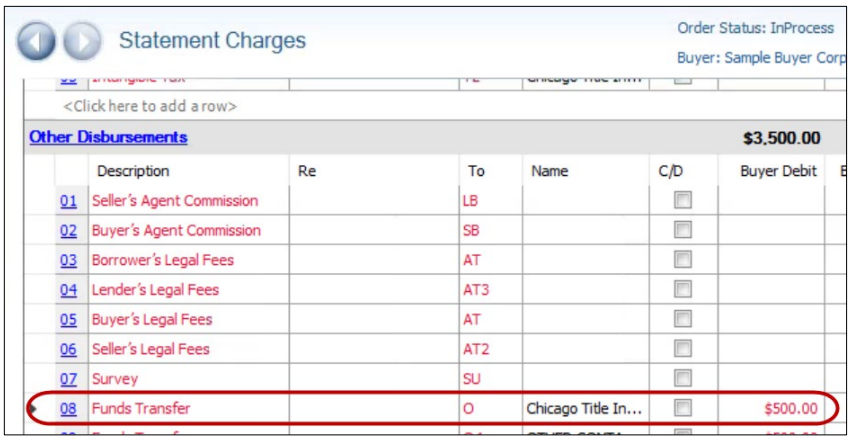
Approval Required before Disbursement

Follow these steps when approval is required to release the disbursement.

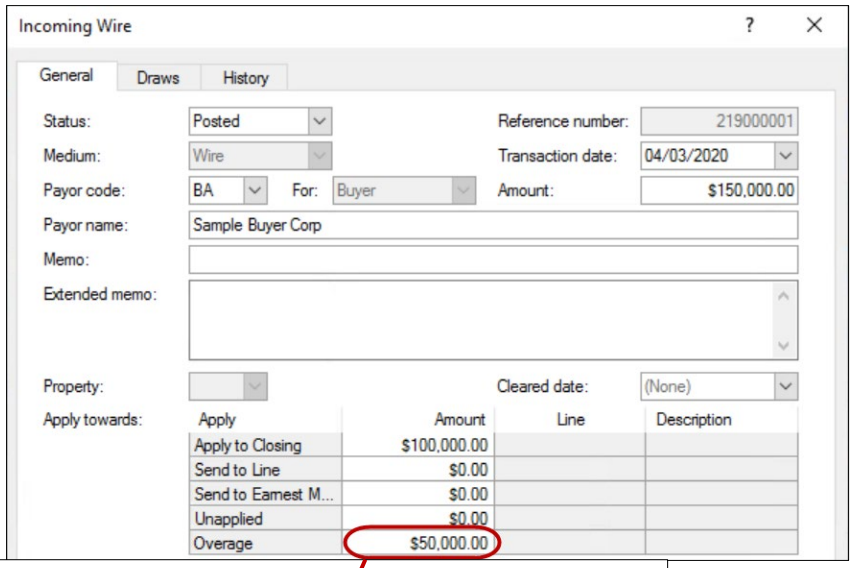
The Register must show a pending disbursement identifying the intended transfer amount. This also reduces the amount of work required of the user when processing the transfer.

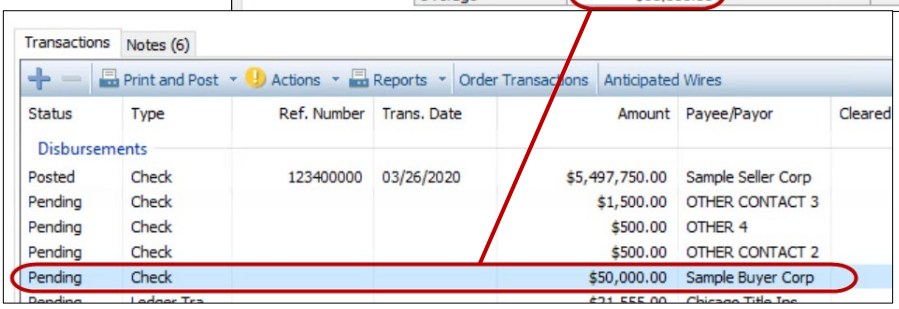
Prepping the Disbursement

1. Create the pending disbursement; this can be created by one of the following,
   - Enter the amount on a Statement Charges line



   - An overage from a posted receipt creating a pending disbursement





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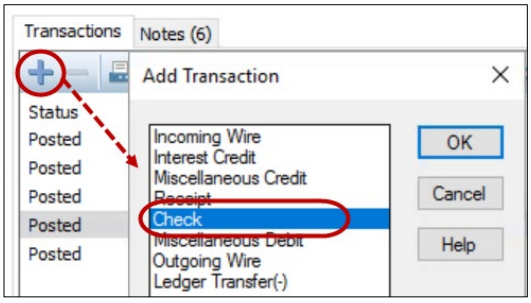
〉 Create a manual check for the transfer amount



2. Request approval [from a teammate/coworker] of the pending disbursement; providing the disbursement detail

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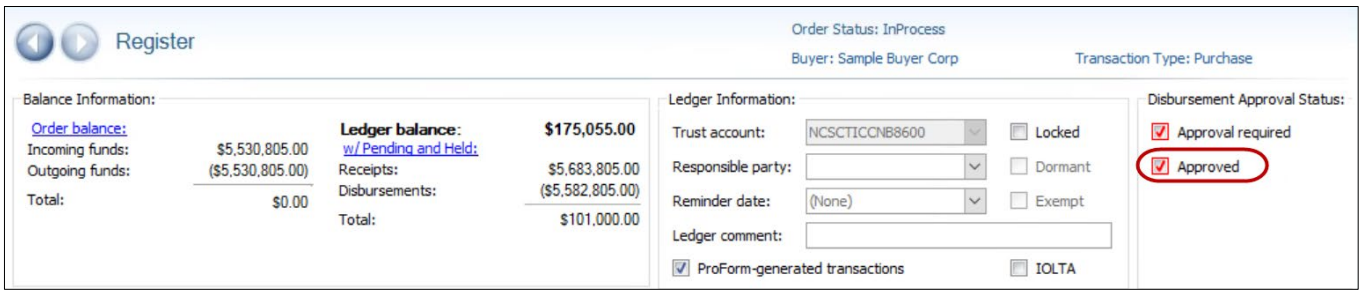
Approving the Disbursement

If you are an approver on an order,

1. Navigate to the **Register**
2. Check the **Approved** check box

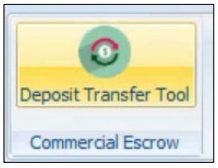


3. **Save** and exit the order
4. Notify the requestor the disbursement is approved

Disbursing the Order

Once notified the disbursement is approved,

3. Transfer the funds; refer to the *Deposit Transfer Tool – User Guide* if needed
4. Disburse your order, if needed
5. Save and exit the order



NOTE: When you save and exit the order after completing the transfer, the **Approved** check box is automatically unchecked. If the transaction requires additional transfers, repeat the above process.

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