Voucher Line Item Comments

Please submit all questions about this Fact Sheet to the DRGR Ask-A-Question (AAQ)
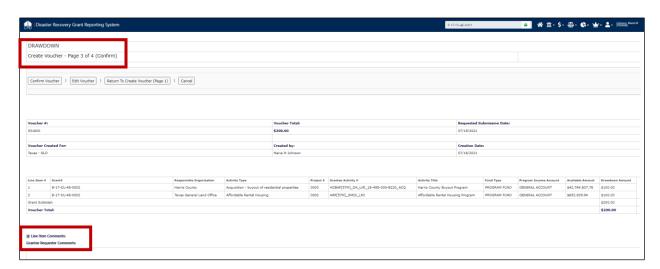https://www.hudexchange.info/program-support/my-question/

Overview

With Release 8.4, DRGR users are now able to enter voucher line item comments during the voucher creation process and voucher review process for authorized grantee and HUD users. The voucher line item comment feature can be configured to be mandatory on an individual grant basis by HUD authorized users.
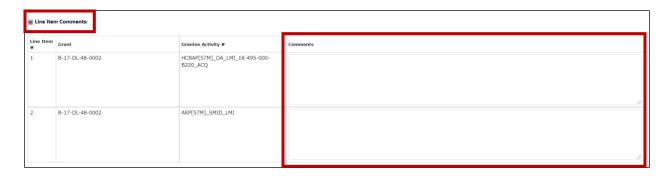
Creating Vouchers – Drawdown Requester Entering Line Item Comments

When authorized grantee users are creating a new voucher, users will be able to add comments under the **Line Item Comments** section on the **Create Voucher – Page 3 of 4** screen. Authorized grantee users will have the ability to add comments for each voucher line item for other applicable grantee users and HUD users to review.

1. Grantee users with the Drawdown Requester role, complete Page 1, and Page 2 of the **Create Voucher** screens via the **Manage My Financial – Create a Voucher** link.

2. On **Create Voucher - Page 3 of 4** screen, grantee users should confirm the financial data entered on all the voucher line items and then scroll down to access the **Line Item Comments** section of the page to enter voucher line item comments for each line item.

Note: Users must select the dropdown arrow next to Line Items Comments to display each voucher line item and comments box to enter text.
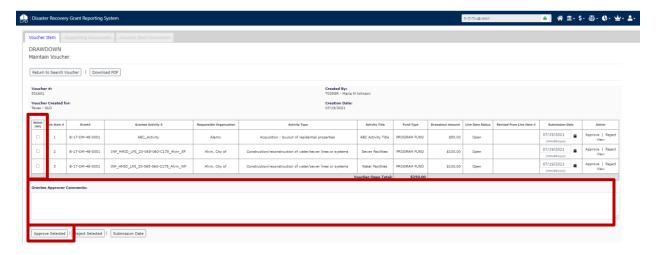
3. After comments are entered for line items and the user attaches supporting documents, if necessary, users then select the **Confirm Voucher** button to submit the voucher for Drawdown Approver review.
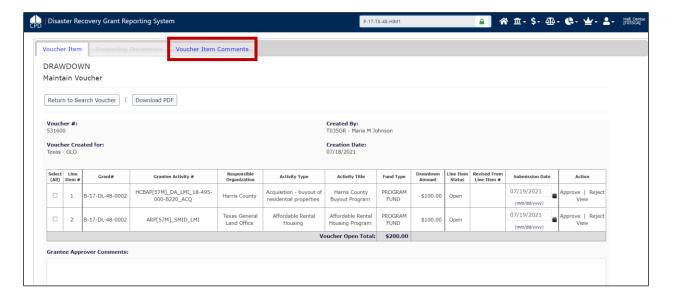
Approving Vouchers – Drawdown Approvers Entering Line Item Comments

When authorized grantee users are reviewing and approving vouchers, users will be able to see the new **Voucher Items Comments** tab on the **Create Voucher** screens and enter comments for each line item.

1. Grantee users with the Drawdown Approver role, select the **Manage My Financial – Search/Maintain Voucher** link to search vouchers. Select **Maintain** from the **Action** column of the applicable voucher to display the **Maintain Voucher** screen (or select the applicable voucher for approval on the **Task list** on the **Home Page)**.

2. On the **Voucher Item** tab, grantee Drawdown Approvers can enter comments in the **Grantee Approver Comments**, then select the checkbox next to the applicable voucher line item or **Select (All)** and select **Approve Selected** to approve the line item(s) and add the applicable comments. Line items can be individually approved as well by selecting **Approve** in the **Action** column (the same process can be performed for line item(s) rejection).
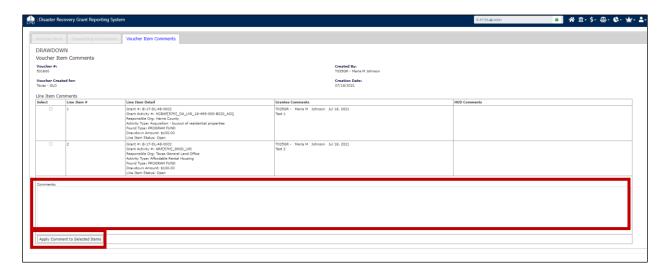

3. Grantee users can review grantee Drawdown Requester comments prior to approval by selecting the new **Voucher Item Comments** tab (following **Voucher Item** and **Supporting Documents** tab). Grantee Drawdown Approvers also can enter comments for each line item in the **Comments** text box.

4. Grantee Drawdown Approvers can enter a comment(s) in the **Comments** text box and then selecting the checkbox next to the applicable voucher line item. After verifying comment(s) entered are accurate, the grantee user selects **Apply Comments to Selected Items** button to save text for each voucher line item. Once saved, comments will be copied to the **Grantee Comments** column, following any comments entered by the Drawdown Requestor.

*Note: Grantee users can apply the same comment to multiple line items by selecting multiple voucher line items under the **Select** column, instead of entering comments for one line item at a time, if applicable.*
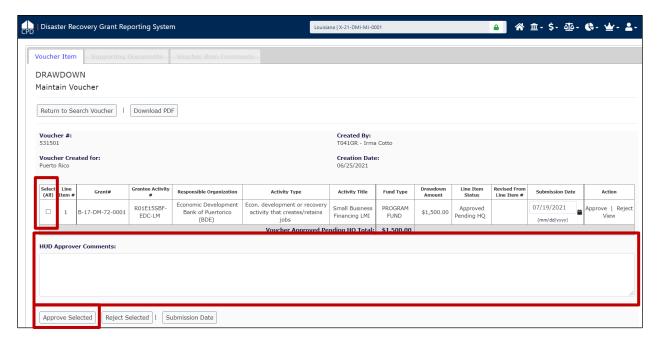

Note: Drawdown Approvers can return to the Voucher Items Comments tab to confirm comments were saved prior to voucher approval or at any point while reviewing the voucher.

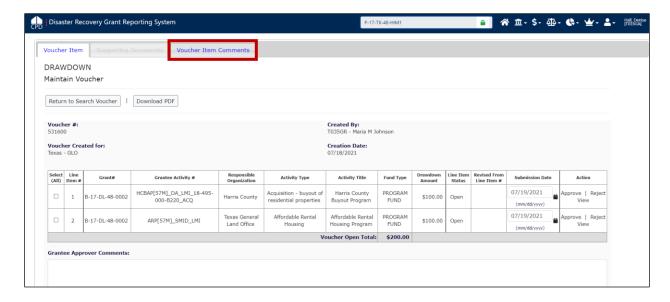# HUD Voucher Review – HUD Users Entering Line Item Comments

When HUD users are reviewing and/or approving vouchers, users will be able to see the **Voucher Items Comments** tab on the **Create Voucher** screens and enter comments for each line item.

Note: HUD users with the Drawdown Approver role (approving overthreshold vouchers) and HUD users with no drawdown approver approval privileges can enter voucher line item comments.

1. Select the **Manage My Financial – Search/Maintain Voucher** link to search vouchers. Select **Maintain** from the **Action** column of the applicable voucher to display the **Maintain Voucher** screen (or select the applicable voucher for approval on the **Task list** on the **Home Page**).

2. On the **Voucher Item** tab, HUD Drawdown Approvers can enter comments in the **HUD Approver Comments**, then select the checkbox next to the applicable voucher line item or **Select (All)** and select **Approve Selected** to approve the line item(s) and add the applicable comments. Line items can be individually approved as well by selecting **Approve** in the **Action** column and the comments entered will be applied to the individually approved line items. Comments will need to be re-entered for each individual approval (the same process can be performed for line item(s) rejection).
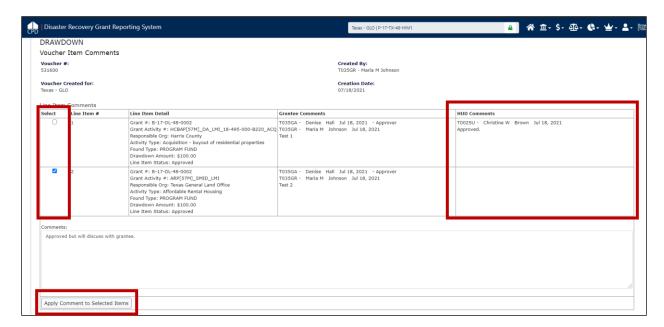

3. HUD users can review grantee Drawdown Requester and Drawdown Approver comments prior to approval by selecting the **Voucher Item Comments** tab (following **Voucher Item** and **Supporting Documents** tabs). The HUD user also can enter comments for each line item in the **Comments** text box. This feature can be utilized by HUD reviewers (non-approvers) to enter comments for review by HUD approvers.

4. HUD users can enter a comment(s) in the **Comments** text box and then select the checkbox next to the applicable voucher line item. After verifying comment(s) entered are accurate, the HUD user should select the **Apply Comments to Selected Items** button to save text for each voucher line item. Once saved, comments entered will be copied to the **HUD Comments** column next to **Grantee Comments** for the applicable line item.

   *Note: HUD users can apply the same comment to multiple line items by selecting multiple voucher line items under the **Select** column, instead of entering comments for one line item at a time, if applicable.*

Note: HUD users can return to the Voucher Items Comments tab to confirm comments were saved prior to voucher approval or at any point while reviewing the voucher.