

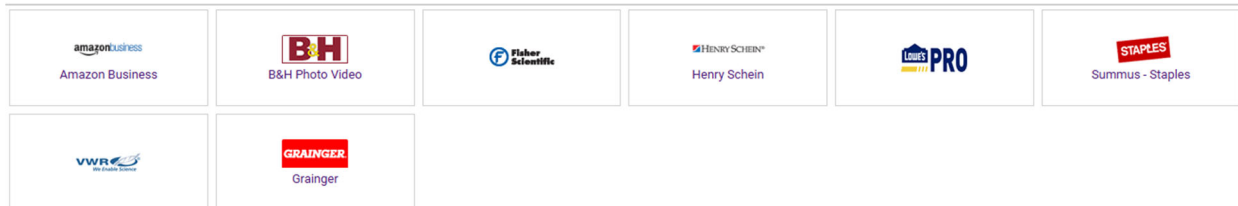
## How To Request a Different Fiscal Year in Jaggaer

**UNDERSTANDING SUBMISSIONS** – There are three methods to process invoices in Jaggaer

- 1) Catalogs – No action is required by departments related to year end. Expenses associated with catalog purchases will be recorded based on the date the supplier electronically submits the invoice. *Recommended departments order early to avoid FY26 expenses recorded in FY27.*

This document does not address catalog purchases beyond this section.

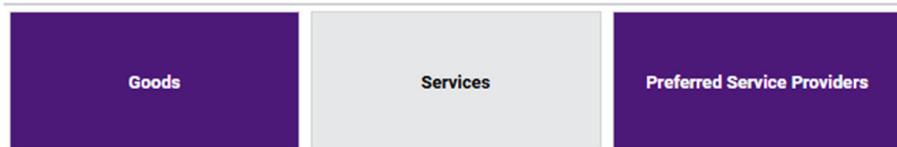
Catalogs



### 2) Procurement Forms

- a. For payment to be made, you must “manually” match the supplier’s invoice to the PO and submit into workflow. Note: *Submission requires Invoice Owner’s approval in Jaggaer.*

Procurement Forms



### 3) Non-Procurement Forms

- a. For payment to be made, you must complete a requisition, attach the supplier’s invoice and submit into workflow

Non-Procurement Forms



**DEFINITIONS -**

- FY = Fiscal Year
- PeopleSoft = System where financial transactions are recorded
- TCU Fiscal Year ends 5/31/26

**UNDERSTANDING WHAT DETERMINES FISCAL YEAR** – Fiscal year is determined based on when goods were received, or the date services were performed.

- 1) Goods received or services performed 5/31/26 or earlier = FY26
- 2) Goods received or services performed after 5/31/26 = FY27

**UNDERSTANDING DEADLINES IN JAGGAER** – There are two deadlines in Jaggaer, 5/29/26 and 6/8/26, which applies to both Procurement and Non-Procurement Forms. *The 6/8/26 deadline requires that you request a different fiscal year in Jaggaer.*

1) Procurement Forms –

- Departments must manually match supplier’s invoices to respective PO’s and submit by 5pm CST, 5/29/26 and/or 6/8/26 to be recorded in FY26.
- The date you match and submit an invoice associated with a PO, is the date the expense will be recorded in PeopleSoft; *unless a different fiscal year is requested.*

**It is up to the department to ensure all invoices are manually matched, submitted and approved by invoice owners by the deadlines (5pm CST, 5/29/26 and/or 6/8/26).**

2) Non-Procurement Forms –

- Requisitions must complete all Jaggaer approvals by 5pm CST, 5/29/26 and/or 6/8/26. Requisitions may require special approvals and many levels of SDA (Signature delegation of Approval) approvals.
- The date requisitions complete all SDA (Signature Delegation of Approval) approvals is the date the expense will be recorded in PeopleSoft; *unless a different fiscal year is requested.*

**It is up to the department to ensure all SDA approvals are obtained by the deadlines (5pm CST, 5/29/26 and/or 6/8/26).**

**ELIGIBILITY TO REQUEST DIFFERENT FISCAL YEAR** – To request a different fiscal year, the expense must be \$250 or greater. You will not be able to request a different fiscal year in Jaggaer for amounts less than \$250. Expenses less than \$250 will be recorded in the fiscal year:

- Procurement Forms – The invoice was manually matched to the PO and submitted (including invoice owner approval).
- Non-Procurement Forms – The requisition was fully approved in Jaggaer.

**REQUIREMENTS** – When submitting an invoice and requesting a different fiscal year, whether manually matching an invoice to a PO or submitting a non-procurement requisition, submitters **MUST** include a comment in Jaggaer explaining the reason for the request.

Submissions without comments will be returned by Accounts Payable.

Examples of required comments:

- Charge FY26, received goods 5/29/26
- Charge FY26, services performed 5/29/26
- Charge FY27, received goods 6/2/26
- Charge FY27, services performed 6/2/26

**TO REQUEST DIFFERENT FISCAL YEAR IN JAGGAER** – To request a different fiscal year in Jaggaer, whether manually matching an invoice to a PO or submitting a non-procurement requisition; from the Summary Tab in the Jaggaer invoice or requisition, select the edit pencil in the General box, and click the Request Different Fiscal Year box:

Jaggaer Invoice:

**Edit General**

**Invoice Information**

Supplier Invoice No. ★ TCU051624

Business Unit ★ TCU

**General Information**

Invoice Date ★ 5/28/2024  
mm/dd/yyyy

Accounting Date 5/29/2024  
mm/dd/yyyy

Request Different Fiscal Year

Jaggaer Requisition:

**Edit General**

**General**

Business Unit ★ TCU

Cart Name ★ Test5748

Description

Prepared by VCFA Payment Request

Prepared for VCFA Payment Request

Cart Source Manual

Request Different Fiscal Year

★ Required fields Save Close

Complete form(s) as required and submit into workflow.