

## Supplier Self-Service Invoices Quick Reference Guide

**Purpose:** The document provides instructions to create self-service invoices in the Ascension Supplier Portal. Suppliers may choose to create self-service invoices OR may submit invoice documents directly to the MSC via email to [invoices@ascension.org](mailto:invoices@ascension.org).

**Audience:** Supplier Users with the AH\_EST\_SUP\_INVOICE\_ENTRY role in PeopleSoft and an accepted eSettlements Agreement in place with Ascension

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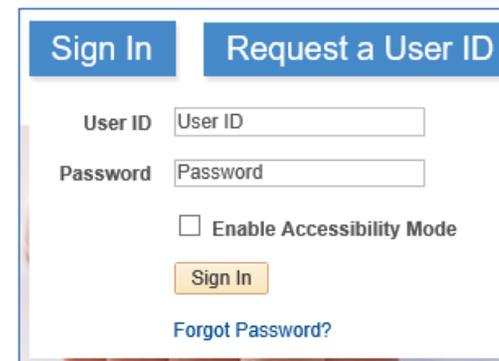
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### Logging In

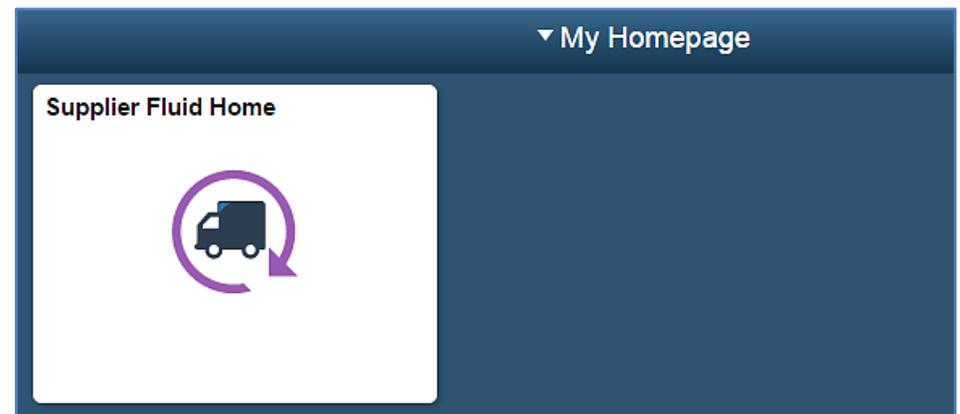
1. Navigate to the Ascension Supplier Portal at <https://supplierportal.ascension.org>.
2. Click the **Sign In** button in the top right corner.



3. Enter your User ID and Password and click the **Sign In** button.



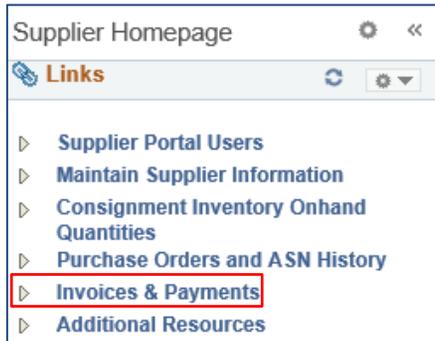
4. Click the **Supplier Fluid Home** tile.



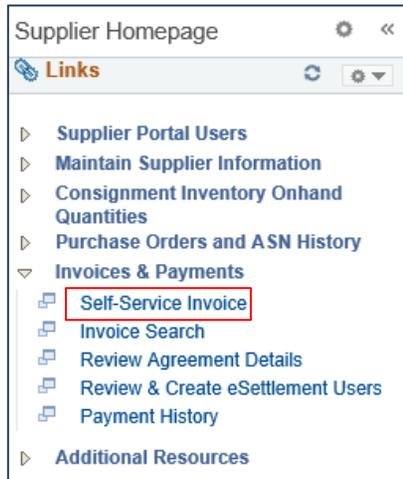
5. You will be taken to the **Supplier Homepage**.

## Creating a Self-Service Invoice

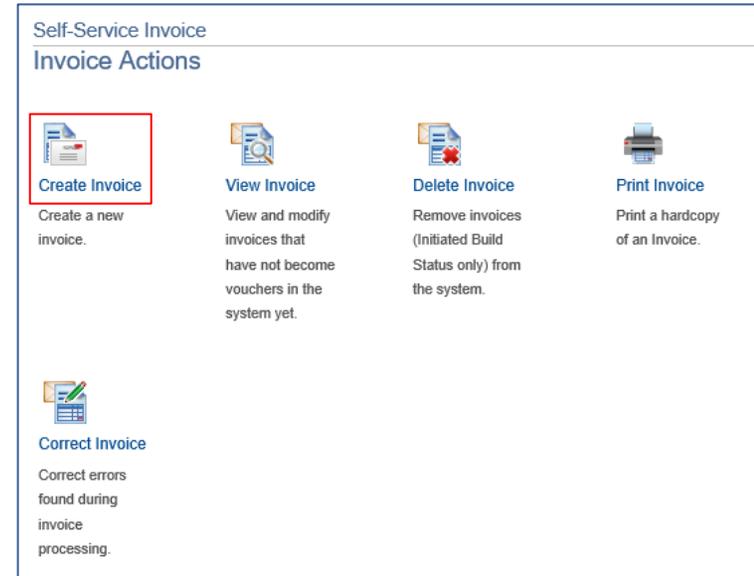
1. In the **Links** section, click on the arrow next to the **Invoices & Payments** group.



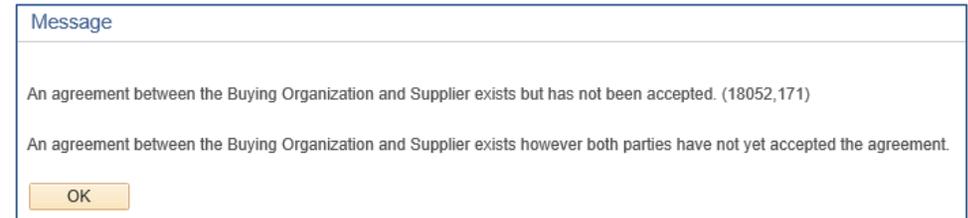
2. Under the **Invoices & Payments** group, click **Self-Service Invoice**.



3. Click the **Create Invoice** icon.



4. If you encounter an error message, this means that an accepted eSettlements Agreement does not exist between your company and Ascension. You will not be able submit a self-service invoice.



If you have the Supplier Administrator role, consult the [Supplier Portal Supplier Administrator Quick Reference Guide](#) for the steps to determine if an eSettlements Agreement is pending your approval and how to approve it.

Suppliers who do not have access to create self-service invoices should submit invoices via email directly to [invoices@ascension.org](mailto:invoices@ascension.org). Please note that all invoices required a valid 15-digit Ascension PO number for payment processing.

Create Invoice  
Invoice Entry

**Invoice Header Information**

\*Supplier SetID SHARE  
\*Supplier  
Location MAIN  
PO BOX 536486  
ATLANTA, GA 30353 USA  
\*Invoice ID  
\*Invoice Date 11/09/2017

Voucher ID NEXT  
\*Buyer  
PO Business Unit  
Currency USD US Dollar  
Requester

Add a New Invoice Line Copy from a Purchase Order Copy from a Packing Slip

**Invoice Details**

Invoice Lines Additional Information PO Details Receiver Details

Item ID	Description	Quantity	UOM	Unit Price	*Merchandise Amt	Currency	Tax
						USD	

**Settlement Information**

Payment Terms Total Amount 0.00 USD  
Payment Method System Check Sales Tax Amount 0.00 USD  
Misc. Charge Amount 0.00 USD  
Gross Amount 0.00 USD

Save and Submit Save for Later Attachments

5. The **Invoice Entry** page will display. Click the magnifying glass icon next to the **Supplier** field to select your supplier ID if the field is not already populated.

\*Supplier SAMPLE SUPPLIER 1

6. Click the magnifying glass icon next to the **PO Business Unit** field and select the desired Ascension PO Business Unit.

PO Business Unit 28012

**Note:** the first 5 digits on an Ascension Purchase Order represent the PO Business Unit.

7. Click the **Copy from a Purchase Order** button.

Copy from a Purchase Order

8. The **Look Up a Purchase Order** page will display. Click the **Search** button to view POs eligible for invoicing.

Create Invoice  
Look Up A Purchase Order

**Search Criteria**

Supplier 0000000027 SAMPLE SUPPLIER 1  
PO Unit 28012 TNNAS ST Rutherford Hospital  
PO Number  
\*PO Date No Date  
PO Buyer  
Item ID  
Description

Search Results Display Header Detail Search Clear

9. Within the **Search Results** panel, check the Select box for the desired PO and click the **Copy to Invoice** button.

**Search Results**

Select	PO Business Unit	Purchase Order	PO Date	Supplier	Supplier Name	Gross Invoice Amount	Curr
<input type="checkbox"/>	28012	0000022497	02/07/2013	0000000027	SAMPLE SUPPLIER 1	3,870.00	USD
<input checked="" type="checkbox"/>	28012	0000093178	03/20/2017	0000000027	SAMPLE SUPPLIER 1	1,237.50	USD

Select All Clear All

Copy To Invoice

10. The **Invoice Entry** page will display. Within the **Invoice Details** panel, review the details of the various tabs for accuracy.

Create Invoice  
Invoice Entry

**Invoice Header Information**

\*Supplier SetID SHARE  
\*Supplier SAMPLE SUPPLIER 1  
Location MAIN  
5658 S REX RD  
MEMPHIS, TN 38119 USA  
\*Invoice ID  
\*Invoice Date 11/11/2017

Voucher ID NEXT  
\*Buyer  
PO Business Unit 28012  
Currency USD US Dollar  
Requester

Add a New Invoice Line Copy from a Purchase Order Copy from a Packing Slip

**Invoice Details**

Invoice Lines Additional Information PO Details Receiver Details

Item ID	Description	Quantity	UOM	Unit Price	*Merchandise Amt	Currency	Tax
	5MM SINGLE USE VALVE	5.0000	BX	247.50000	1,237.50	USD	

11. If updates are necessary, make the edits and then click the **refresh**  icon within the **Settlement Information** panel and see the impacts on **Total Amount** and **Gross Amount**.

Settlement Information 				
Payment Terms	Net 30	Total Amount	1,237.50	USD 
Payment Method	System Check	Sales Tax Amount	0.00	USD
		Misc. Charge Amount	0.00	USD 
		Gross Amount	1,237.50	USD

12. Enter any desired attachment via the **Attachments** button.

**Note:** It is mandatory to enter at least one attachment, which must be a copy  of your physical invoice.

13. Enter your invoice number within the **Invoice ID** field towards the top left of the page.

\*Invoice ID 11A12345678

14. If you are ready to submit the eSettlements invoice for approval and payment, perform the following steps:

a. Click **Save and Submit** button towards the bottom left

Save and Submit

b. Click the **OK** button within the displayed message

Message

Selecting OK will Submit the invoice to the Buyer. Cancel will cancel submission to the Buyer. (18052,744)

Clicking on the Save and Submit button will edit and save the invoice. If the invoice passes all the edits and saves successfully, the invoice can no longer be modified, but it can be viewed.

Only a Buyer who can review Self-service invoices can modify the invoice.

15. Confirmation will display that you have successfully submitted your self-service invoice

Create Invoice

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Save Confirmation

 The Save was successful.

16. If you wish to save the self-service invoice as a draft, perform the following steps:

a. Click **Save for Later** button towards the bottom left

Save for Later

Confirmation will display that you have successfully saved your self-service invoice

Create Invoice

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Save Confirmation

 The Save was successful.

**Note:** Ascension will have no visibility to those invoices that you save as drafts. You must access these draft invoices via either the **View Invoices** or **Delete Invoices** page and click the **Save and Submit** button from there in order to be submitted for approval and payment by Ascension.

## Viewing a Self-Service Invoice

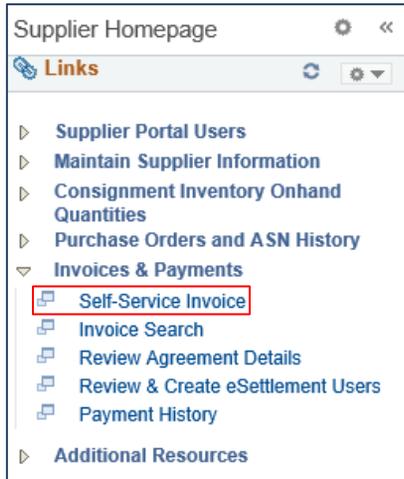
Supplier users utilize this functionality to view self-service invoices that fall within either of these two categories:

- Invoices they have just submitted for approval. These invoices will be visible only up until the invoices have been converted into vouchers via Ascension's nightly processing job runs.

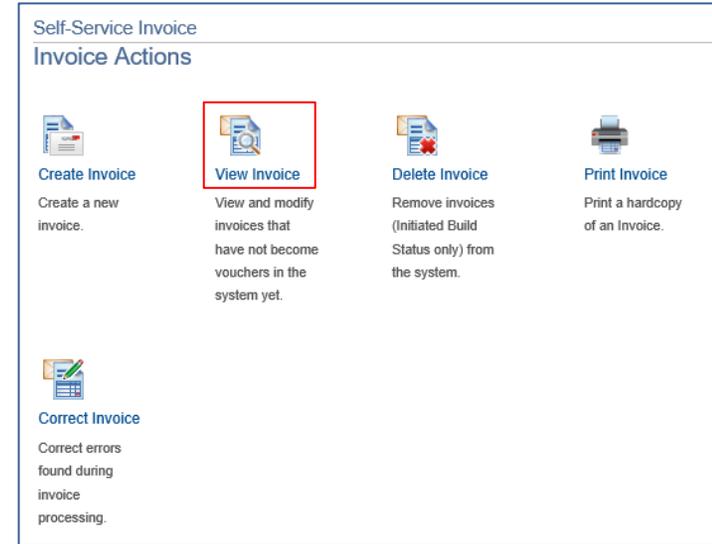
Once the self-service invoice has been converted to a voucher, users should utilize the **Manage Bills** page. Please consult the **Viewing Invoice and Payment Status QRG** for more details.

- Invoices that have been saved as drafts (e.g. Save for Later)

1. In the **Links** section, click on the arrow next to the **Invoices & Payments** group
2. Within the **Invoices & Payments** group, click **Self-Service Invoice**.



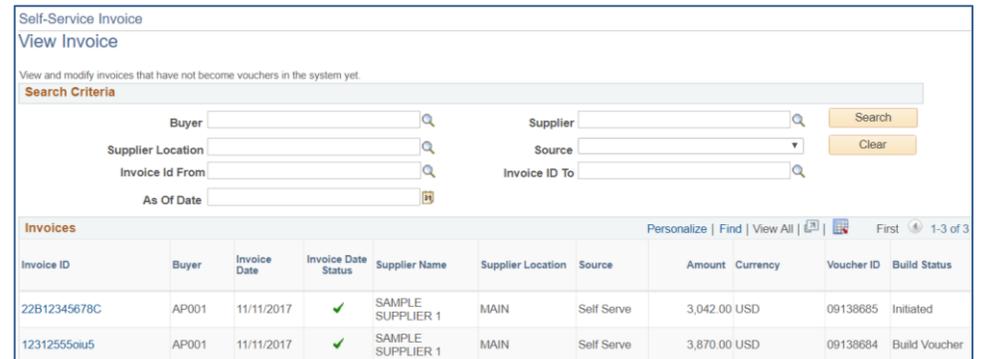
3. Click the **View Invoice** icon.



4. The **View Invoice** page is displayed.

Invoices that have been saved as a draft will have a **Build Status** of *Initiated*.

Invoices that have been submitted for approval and payment will have a **Build Status** of *Build Voucher*.



5. Click the link for the desired **Invoice ID**.

Invoice ID	Buyer	Invoice Date	Invoice Date Status	Supplier Name	Supplier Location	Source	Amount	Currency	Voucher ID	Build Status
22B12345678C	AP001	11/11/2017	✓	SAMPLE SUPPLIER 1	MAIN	Self Serve	3,042.00	USD	09138685	Initiated

6. The **Invoice Entry** page is displayed.

If the invoice you selected is in a **Build Status** of *Initiated* (ie. a draft invoice), you will have access to the **Save and Submit** and **Save for Later** buttons.

If the invoice you selected is in a **Build Status** of *Build Voucher*, you are presented with a view-only version of the **Invoice Entry** page.

Create Invoice  
Invoice Entry

**Invoice Header Information**

\*Supplier SetID: SHARE      Voucher ID: 09138685  
 \*Supplier: SAMPLE SUPPLIER 1      \*Buyer: PO Business Unit 22006  
 Location: MAIN      5658 S REX RD      Currency: USD      US Dollar  
 MEMPHIS, TN 38119 USA      \*Invoice ID: 22B12345678C      Requester:   
 \*Invoice Date: 11/11/2017      VAT Treatment Group:   
 Add a New Invoice Line      Copy from a Purchase Order      Copy from a Packing Slip

**Invoice Details**      Personalize | Find | View All | First 1 of 1

Item ID	Description	Quantity	UOM	Unit Price	*Merchandise Amt	Currency	Tax
00000000000000	DRAIN MEDIASTINAL AXIOM EYE	18.0000	EA	169.00000	3,042.00	USD	

**Settlement Information**

Payment Terms: Net 30      Total Amount: 3,042.00 USD  
 Payment Method: System Check      Sales Tax Amount: 0.00 USD  
 Misc. Charge Amount: 0.00 USD  
 Gross Amount: 3,042.00 USD

Save and Submit      Save for Later      Attachments (1)

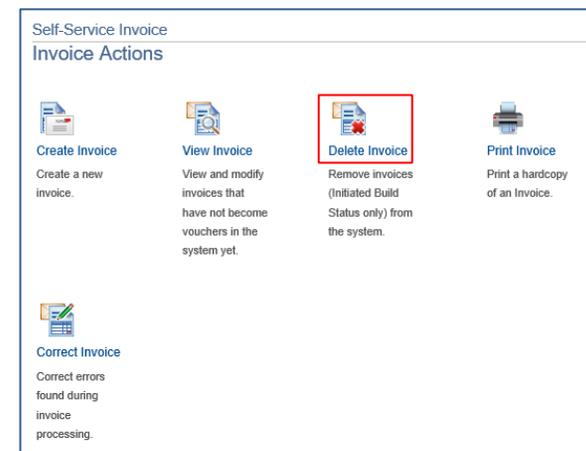
## Deleting a Self-Service Invoice

**Note:** Supplier users can delete only those self-service invoices that been saved as drafts and not yet submitted for payment and approval.

1. In the **Links** section, click on the arrow next to the **Invoices & payments** group.
2. Under the **Invoices & Payments** group, click **Self-Service Invoice**.



3. Click the **Delete Invoice** icon.



4. The **Delete Invoice** page is displayed.

Self-Service Invoice  
Delete Invoice

Remove invoices (Initiated Build Status only) from the system.

**Search Criteria**

Buyer  Supplier  Search

Supplier Location  Source  Clear

Invoice Id From  Invoice ID To

As Of Date

**Invoices** Personalize | Find | View All | First

Select	Invoice ID	Buyer	Invoice Date	Invoice Date Status	Supplier Name	Supplier Location	Source	Amount	Currency	Voucher ID	Build Status
<input type="checkbox"/>	22B12345678C	AP001	11/11/2017	✓	SAMPLE SUPPLIER 1	MAIN	Self Serve	3,042.00	USD	09138685	Initiated

Select All  Clear All

5. To delete an invoice, perform the following steps:

a. Click the **Select** checkbox to the left of the desired invoice.

**Invoices** Personalize | Find | View All | First

Select	Invoice ID	Buyer	Invoice Date	Invoice Date Status	Supplier Name	Supplier Location	Source	Amount	Currency	Voucher ID	Build Status
<input checked="" type="checkbox"/>	22B12345678C	AP001	11/11/2017	✓	SAMPLE SUPPLIER 1	MAIN	Self Serve	3,042.00	USD	09138685	Initiated

b. Click the **Delete** button at the bottom left of the page.

Confirmation will display that you have successfully deleted your self-service invoice.

Delete Invoice  
Save Confirmation

The Save was successful.

Self-Service Invoice  
Delete Invoice

Remove invoices (Initiated Build Status only) from the system.

**Search Criteria**

Buyer  Supplier  Search

Supplier Location  Source  Clear

Invoice Id From  Invoice ID To

As Of Date

**Invoices** Personalize | Find | View All | First

Select	Invoice ID	Buyer	Invoice Date	Invoice Date Status	Supplier Name	Supplier Location	Source	Amount	Currency	Voucher ID	Build Status
<input type="checkbox"/>	22B12345678C	AP001	11/11/2017	✓	SAMPLE SUPPLIER 1	MAIN	Self Serve	3,042.00	USD	09138685	Initiated

Select All  Clear All

6. If you wish to submit the draft invoice for approval, click the link for the desired **Invoice ID**.

Invoice ID	Buyer	Invoice Date	Invoice Date Status	Supplier Name	Supplier Location	Source	Amount	Currency	Voucher ID	Build Status
22B12345678C	AP001	11/11/2017	✓	SAMPLE SUPPLIER 1	MAIN	Self Serve	3,042.00	USD	09138685	Initiated

7. The **Invoice Entry** page is displayed. You will have access to the **Save and Submit** and **Save for Later** buttons.

**Note:** you will only have the ability to submit the invoice for approval if you did not delete it via step #5 above.