

Self-Service Invoices Quick Reference Guide

Purpose: This guide 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.

Audience: Supplier Portal users

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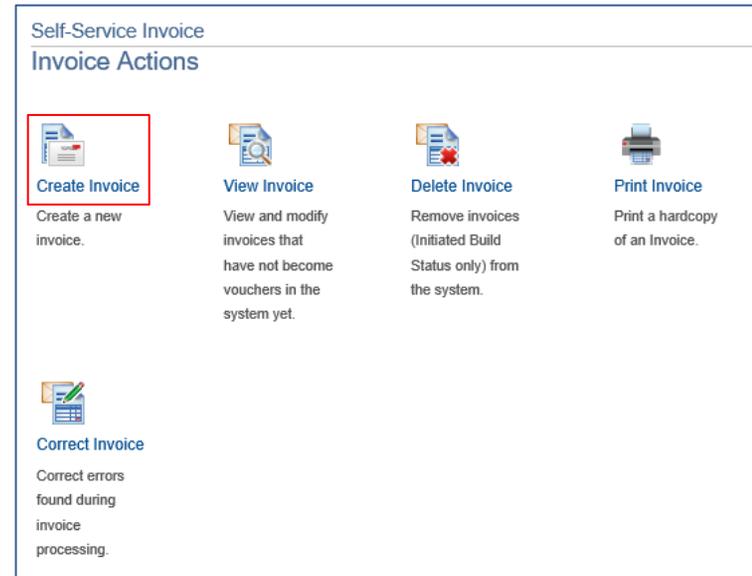
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General Information

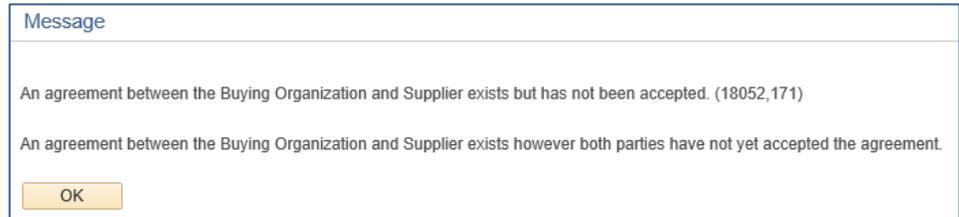
Effective May 7, 2019 Ascension is temporarily suspending all new enrollments for self-service invoicing on the Supplier Portal to allow us to develop enhancements to the process. We apologize for any inconvenience this may cause. Please email your invoices to us for processing at invoices@ascension.org, and check back at <https://supplierportal.ascension.org> for updates about our self-service invoicing feature.

Creating a Self-Service Invoice

1. In the left hand **Navigation Menu**, click 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. Please contact the MSC to request that an eSettlements Agreement is sent to you for the Supplier Portal.





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

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.

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

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

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

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

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

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

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

- 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
Payment Method	System Check
Total Amount	1,237.50 USD
Sales Tax Amount	0.00 USD
Misc. Charge Amount	0.00 USD
Gross Amount	1,237.50 USD

- Attach a copy of the physical invoice by clicking the the **Attachments** button. This is required for invoice payment processing.
- Enter your invoice number in the **Invoice ID** field towards the top left of the page.

*Invoice ID

- If you are ready to submit the invoice for approval and payment, click the **Save and Submit** button towards the bottom left.

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.

- Click the **OK** button to confirm and submit the invoice.
- Confirmation will display that you have successfully submitted your self-service invoice
- If you wish to save the self-service invoice as a draft, click the **Save for Later** button towards the bottom left. **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 submit the invoice for approval and payment by Ascension.

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

Create Invoice

Save Confirmation

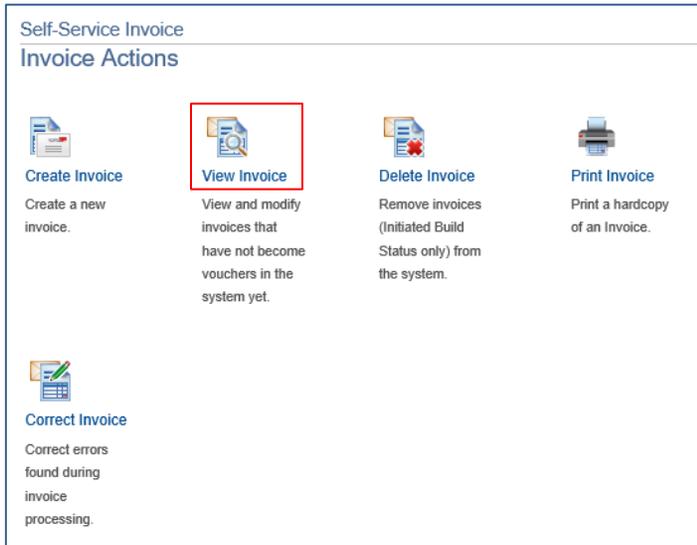
The Save was successful.

Viewing a Self-Service Invoice

You can view 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, you can view it through the **Invoice Search** section of the Supplier Portal.
- Invoices that have been saved as drafts (e.g. Save for Later)

1. In the left hand **Navigation Menu**, click the arrow  next to the **Invoices & Payments** group.
2. Under the **Invoices & Payments** group, click **Self-Service Invoice**.
3. Click the **View Invoice** icon.



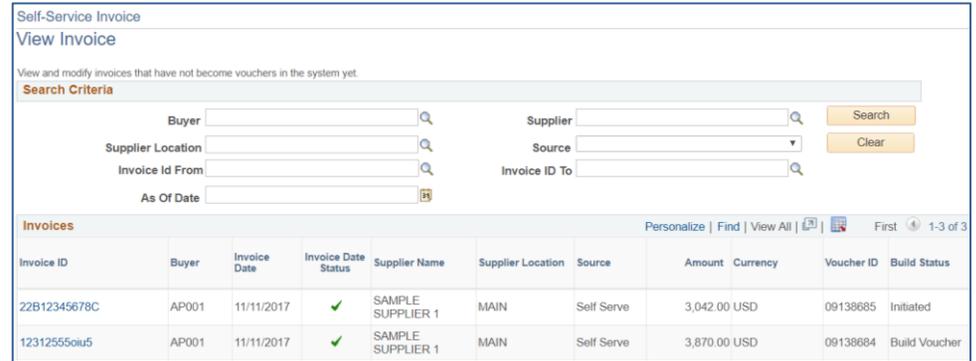
Self-Service Invoice
Invoice Actions

- Create Invoice**
Create a new invoice.
- View Invoice**
View and modify invoices that have not become vouchers in the system yet.
- Delete Invoice**
Remove invoices (Initiated Build Status only) from the system.
- Print Invoice**
Print a hardcopy of an invoice.
- Correct Invoice**
Correct errors found during invoice processing.

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*.



Self-Service Invoice
View Invoice

View and modify invoices that have not become vouchers in the system yet.

Search Criteria

Buyer: Supplier: Search

Supplier Location: Source: Clear

Invoice Id From: Invoice ID To:

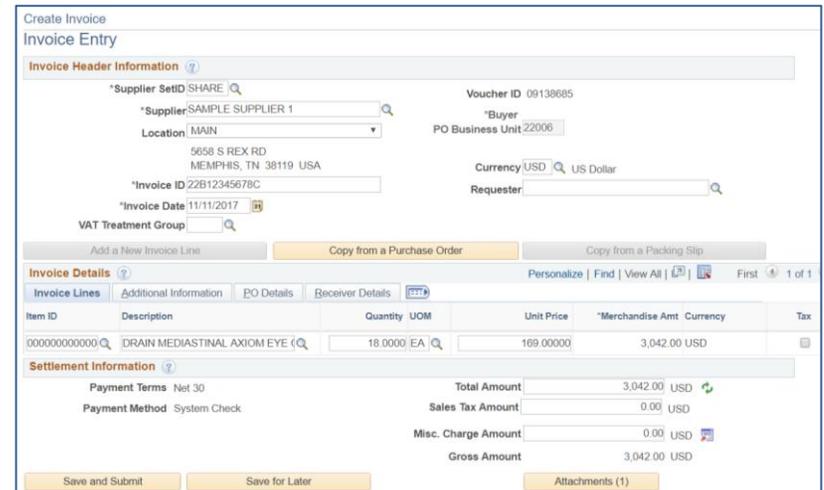
As Of Date:

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
12312555oiu5	AP001	11/11/2017	✓	SAMPLE SUPPLIER 1	MAIN	Self Serve	3,870.00	USD	09138684	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.



Create Invoice
Invoice Entry

Invoice Header Information

*Supplier SetID: SHARE Voucher ID: 09138685

*Supplier: SAMPLE SUPPLIER 1 *Buyer: PO Business Unit 22006

Location: MAIN

9658 S REX RD
MEMPHIS, TN 38119 USA

*Invoice ID: 22B12345678C Currency: USD US Dollar

*Invoice Date: 11/11/2017 Requester:

VAT Treatment Group:

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

Invoice Details

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

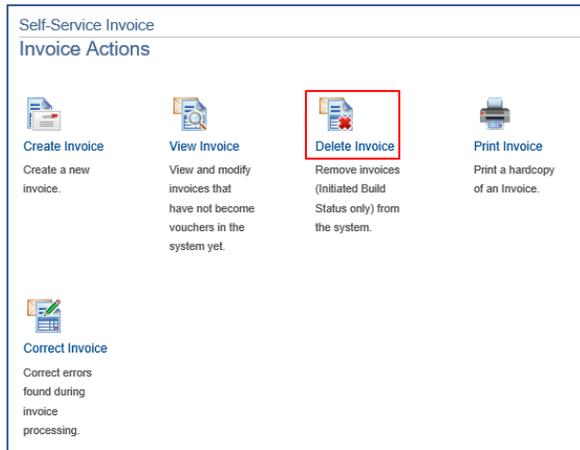
Save and Submit Save for Later Attachments (1)

7. 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 to submit the draft invoice for approval.
8. 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.

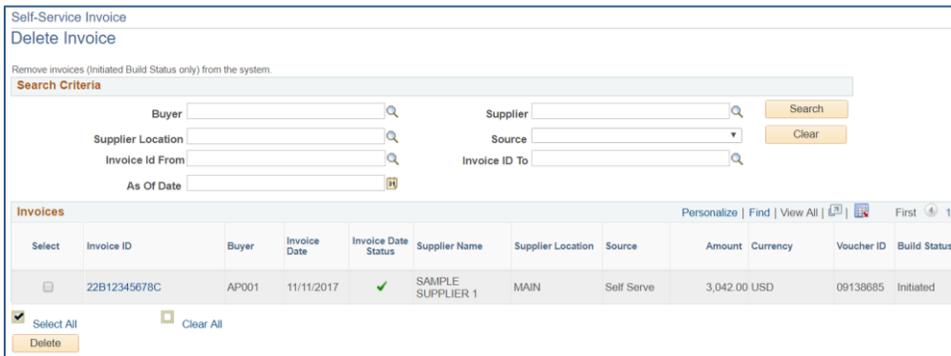
Deleting a Self-Service Invoice

Note: You will only be able to delete self-service invoices that been saved as drafts and not yet submitted for payment and approval. Invoices that have been submitted cannot be deleted.

1. In the left hand Navigation Menu, click 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

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

Select All Clear All

Delete

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



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

6. Click the **Delete** button at the bottom left of the page.
7. Confirmation will display that you have successfully deleted your self-service invoice.

