How to Create an Electronic Invoice in iSupplier

Contents

Overview

This job aid reviews the **process for creating and submitting an electronic invoice in Oracle iSupplier.** To submit an invoice in iSupplier to NIH, you will need:

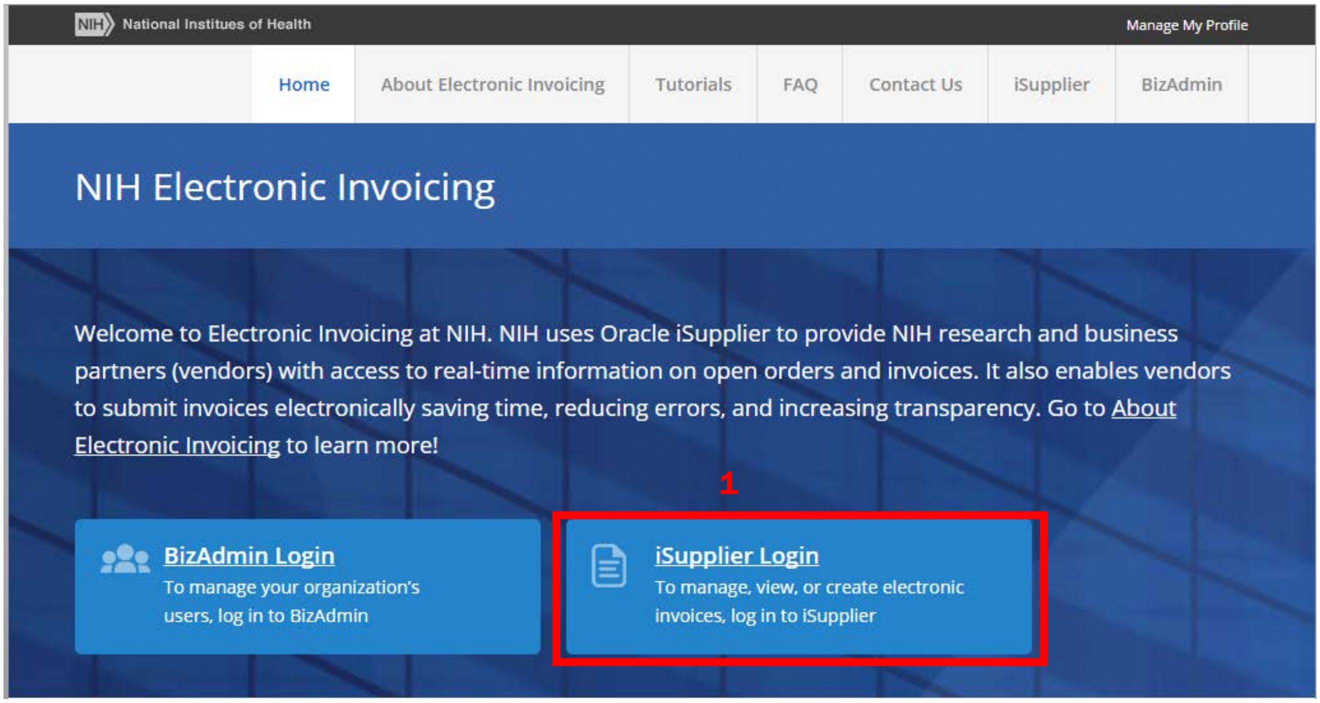
1) The Purchase Order (PO) number associated with the goods / services being invoiced, and Release number if it is a BPA or IDIQ.
2) Information to match the invoice to the relevant line number(s).
3) Required invoice details such as an invoice number, a detailed description of the goods or services being invoiced that matches the description on the Purchase Order, and the invoice amount.
4) The iSupplier "invoice entry" responsibility for your organization in order to see the "Create Invoice" button. This responsibility is designated at the time you are invited to register and can be managed by your organization's Biz Admin(s).

Important Tips:

- iSupplier refers to all types of agreements like Awards, Contracts, TODOs, BPAs, IDIQs, and Orders as **"Purchase Orders".**
- For BPAs and IDIQs with multiple releases, please **do not combine multiple releases** into one invoice. Invoices against multiple releases will be cancelled.
- **Matching your invoice to the correct PO lines is critical**. One common reason that invoices are cancelled by NIH is that the funding lines were matched incorrectly. If you are unsure which lines to match, contact your Contract Officer or Buyer for further guidance.
- **After you submit an invoice electronically, it cannot be changed**. If you need to make any adjustments to a submitted invoice, contact NIH Electronic Invoicing Vendor Support to cancel your invoice at (301) 496-6088.
- Use the **Back and Next buttons within iSupplier** to move between screens. Please **DO NOT use your internet browser's back or forward** buttons because it could disrupt your invoice entry session.

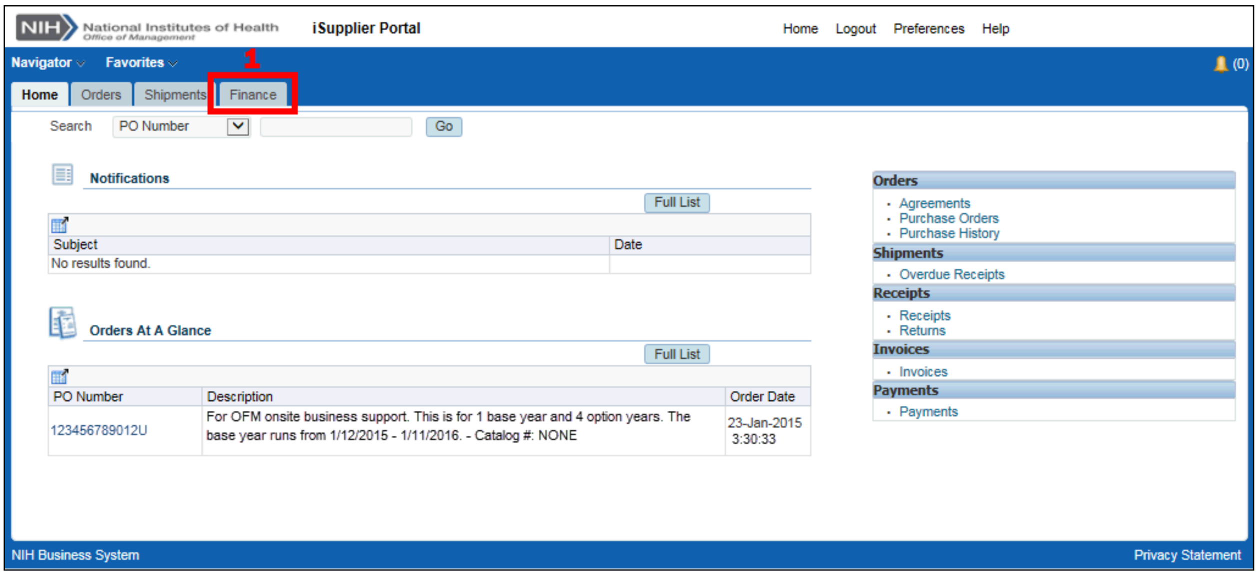
Step 1: Login to iSupplier

To begin, go to the NIH Electronic Invoicing website (https://evip.nih.gov) and complete the user authentication process to log in to iSupplier (1).



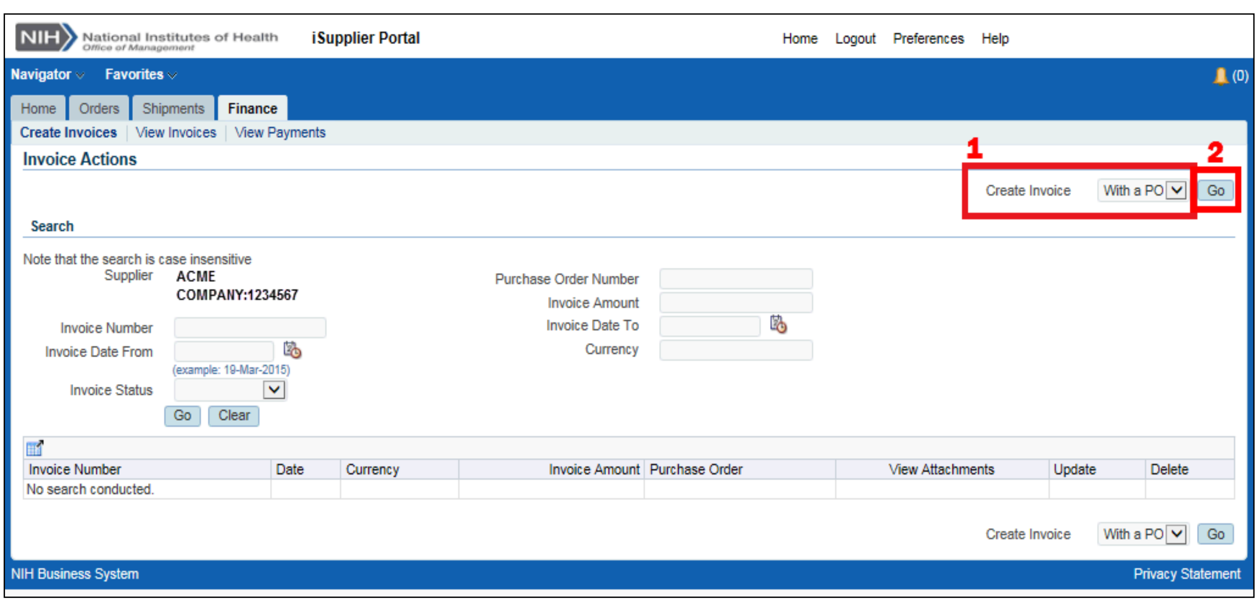
Step 2: Select Create an Invoice

From the iSupplier Home page, select the **Finance** (1) tab on the top left of the page to begin creating an invoice.



The **Invoice Actions** page appears.

- On the right side, see Create Invoice. The dropdown menu will default to **With a PO** (1), which is the option to select.
- **Note:** The action buttons on the top and bottom of the screen are the same and you can use either.
- Select either of the **Go** (2) buttons to continue.



Step 3: Search for Purchase Order Number

The **Create Invoice: Purchase Orders** page displays.

- In the **Purchase Order Number** (1) field, enter the PO number you would like to invoice against. When searching for a PO, do not include the first 4 characters of the PO number.

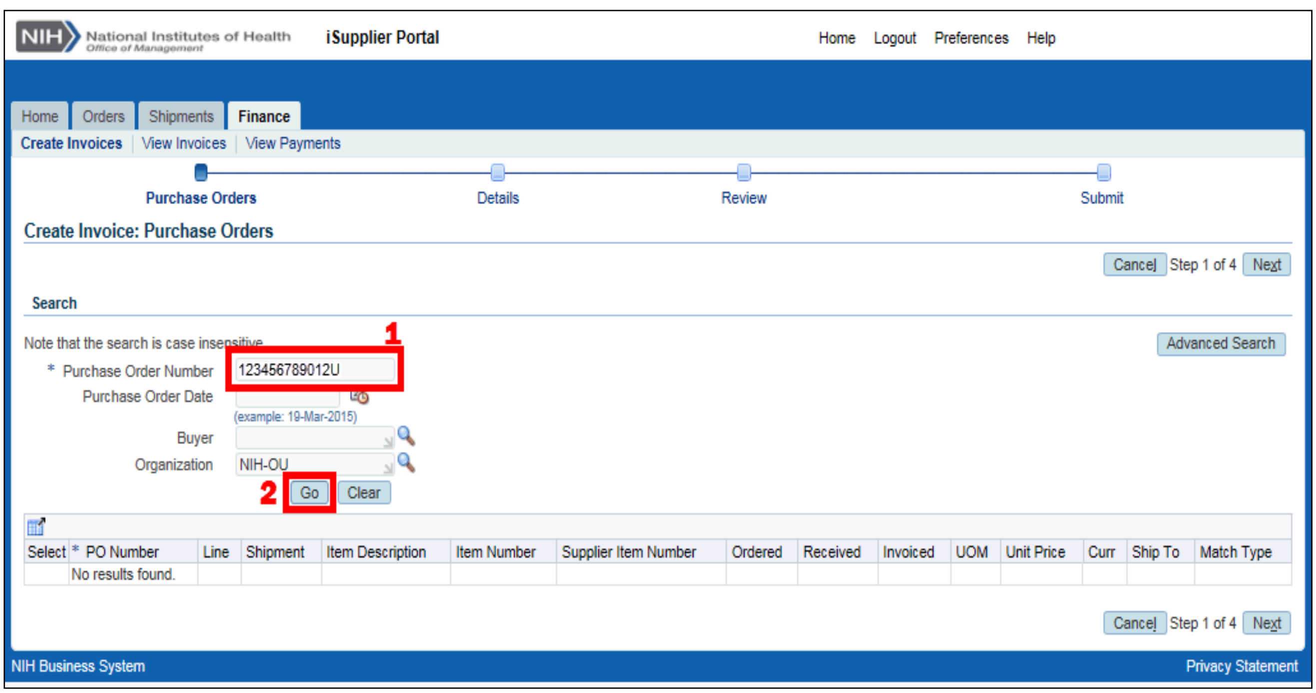
  - **For example: if the PO number is HHSN123456789012U, just enter 12356789012U.**

- If you are invoicing the release of a BPA or IDIQ, you can either select the specific release from the search results or you can narrow the initial search by entering the PO number-release number into the search field.

  - **For example: 1235678912U-111222.**

- **<u>Note:</u>** You cannot create an invoice for multiple releases on a BPA or IDIQ. You must invoice one release at a time in order for the invoice to be routed for approval. An invoice submitted against multiple releases will be cancelled.

- Select **Go** (2) to search for the PO.



Step 4: Select Lines

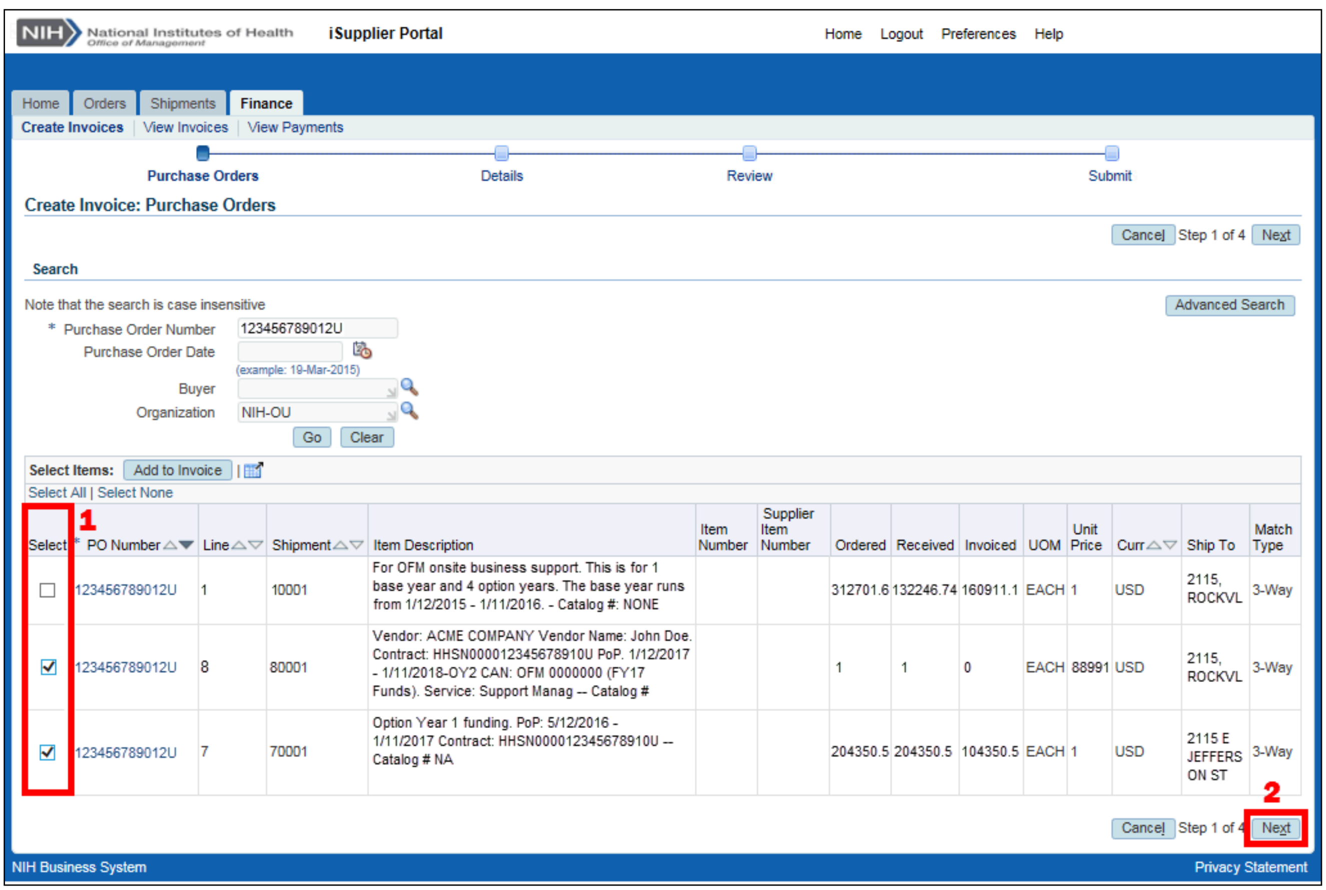
Once the search is complete, the PO along with all of its associated lines will display.

- In the left hand column of the table, **Select** (1) the box next to the line(s) you would like to invoice against. You may select multiple lines.

- Matching to the correct line(s) can be challenging for complex multi-line Purchase Orders. Carefully review your Purchase Order documentation and the Item Description field to verify that you are selecting the lines that correspond to the charges on your invoice. If you do not know which lines to select, please work with your Contract Officer, Buyer or Program Officer to verify prior to submitting your invoice.

    - **Note:** This is a **critical step**. Incorrectly matched lines can result in cancelled invoices and / or impacts to the available funding on lines that have a trickledown effect on other invoices.

- Once you have selected the appropriate lines to invoice, in this case lines 7 and 8, select **Next** (2) to continue.



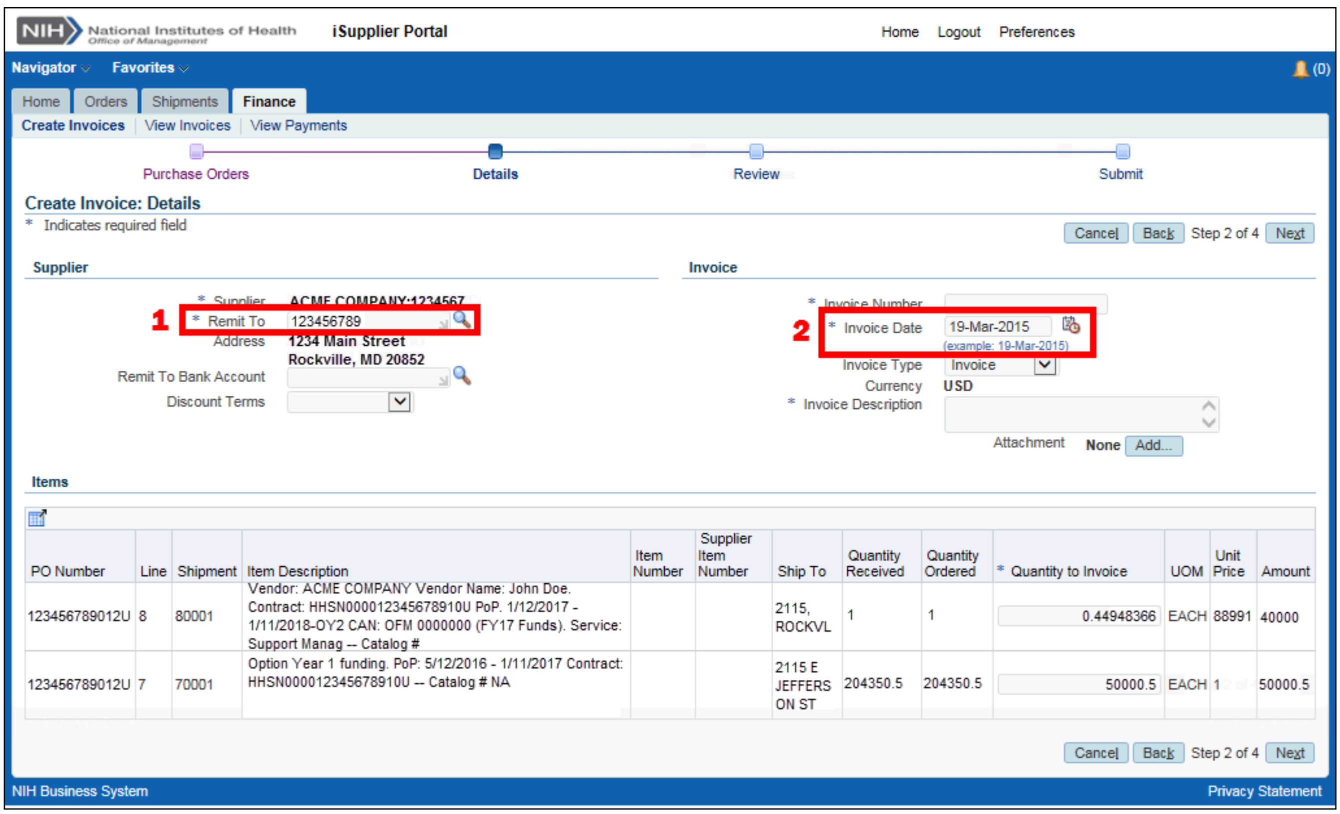
Step 5: Enter Invoice Header Information

The **Create Invoice: Details** page displays.

- The **Supplier**, **Remit To**, **Address**, **Invoice Type** and **Currency** fields default with information based on the selected Purchase Order.

- Please verify that the **Remit To** (1) field is correct. This field determines what bank account your invoice payment will be sent to. If payment should be directed to a different bank account, select it from the drop down list. The list of Remit To sites comes from your organization's records (DUNS) on www.sam.gov.

- The **Invoice Date** (2) prepopulates with the current date but can be changed.



- In the form fields enter the **Invoice Number** (1) and a detailed **Invoice Description** (2).

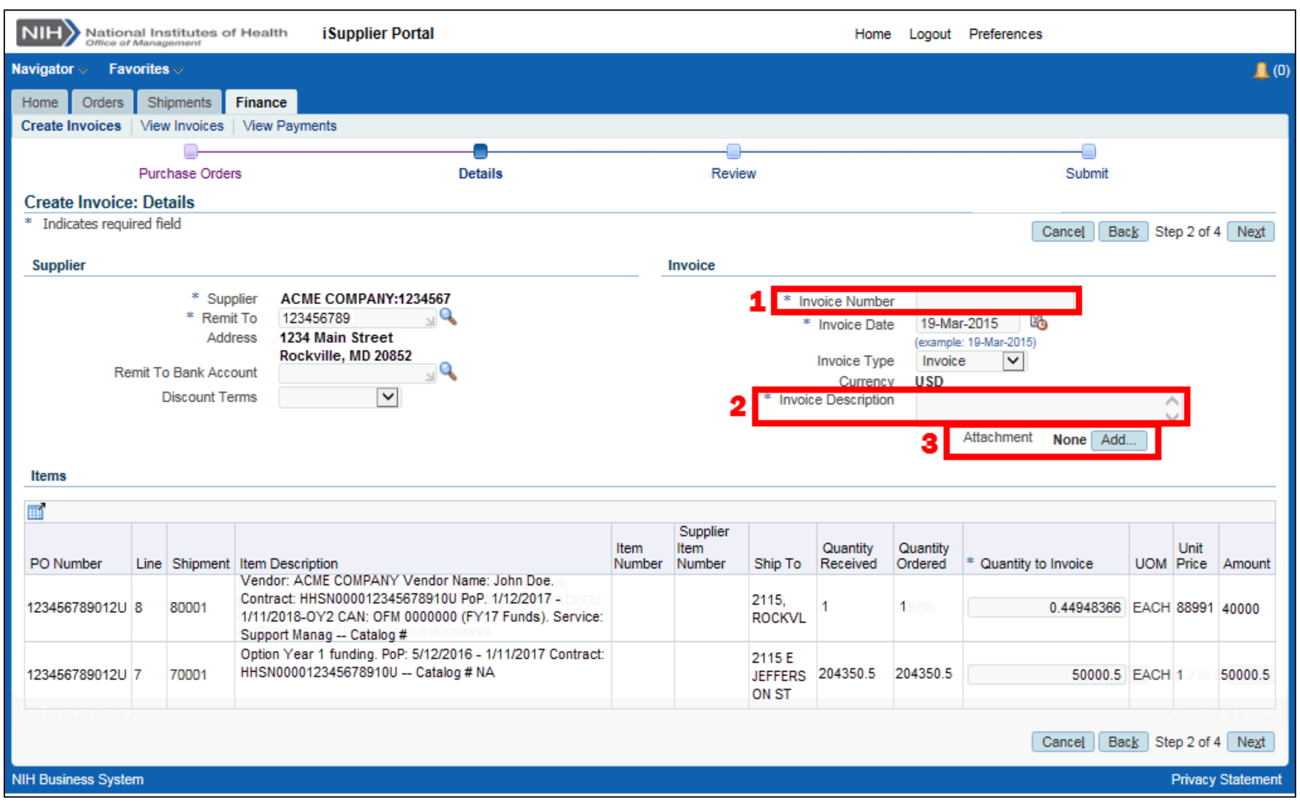
- The **invoice description is an important field** that is used to review and approve your invoice. If the description is not clear and does not **match the details of your PO,** your invoice could be cancelled.

  - **For Goods:** Include information that will help describe the goods delivered such as the shipping date, the product description, quantity, unit cost, shipping & handling, or any other information specifically requested by your NIH contacts.

  - **For Services:** Include information that will help describe the services delivered such as the period of performance (PoP), a description or title of the program name, how it is being billed (e.g. by percent complete, a monthly payment, if it is a final invoice, etc.) the type of charges (e.g. T&M, travel, overtime, etc.), or any other information specifically requested by your NIH contacts.

- Any supporting documentation requested by the CO, Buyer, or Project Officer must be added using the Attachment function. The description and invoice number should match any supporting documentation that you attach. Attachments can be added to the invoice by selecting the **Add** (3) button on the **Attachment** line.

  - **Note:** Attachments have a size limit of 5MB, but multiple attachments can be added.



Step 6: Enter Invoice Detail Information

- In the **Items** section on the bottom part of the page, the **Quantity to Invoice** (1) field defaults to the remaining quantity, i.e. what has not yet been invoiced. Make sure to adjust this field if it is not a final invoice, and enter the quantity you would like to invoice. Quantity could be a dollar value or a number of units, depending on how your Purchase Order is set up.

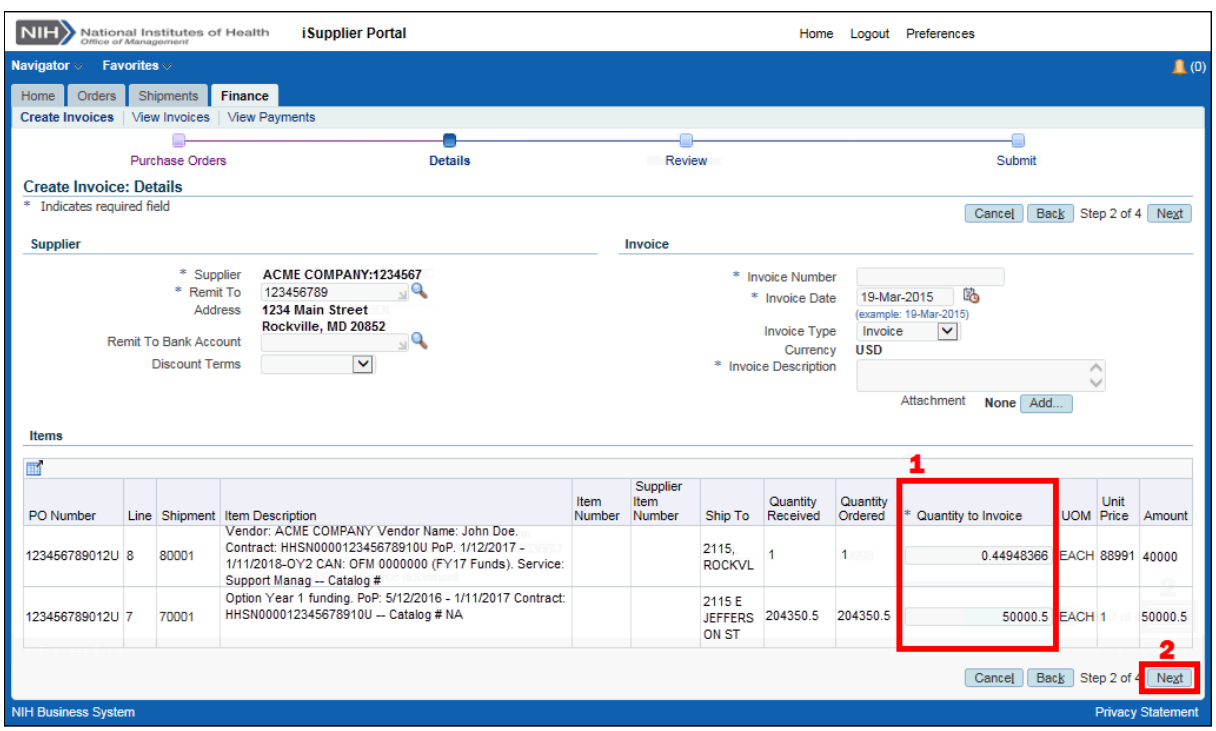
  - ➢ **Note:** In this example, the lines were set up in different ways. For line 7, the Quantity Ordered field is a dollar amount ($204,378.80) and the Unit Price is a quantity of 1. For line 8, the Quantity Ordered field is a unit amount (1) and the Unit Price is a dollar amount ($88,991.00).

  - ➢ If you notice that a line is showing a Quantity Ordered value of 1 and you want to invoice an amount that is less than the full value of the Unit Price ($88,991.00), then you need to divide your invoice dollar amount by the Unit Price and enter your Quantity to Invoice as a decimal.

  - ➢ **For example, if your invoice value for line 8 is $40,000, divide it by the Unit Price of $88,991.00 and you will get .44948366. Enter .44948366 as the Quantity to Invoice**. Note you can add up to 12 decimal places.

- On the following page you can use the **Recalculate Total** button to verify that the decimal you entered outputs the correct dollar amount.

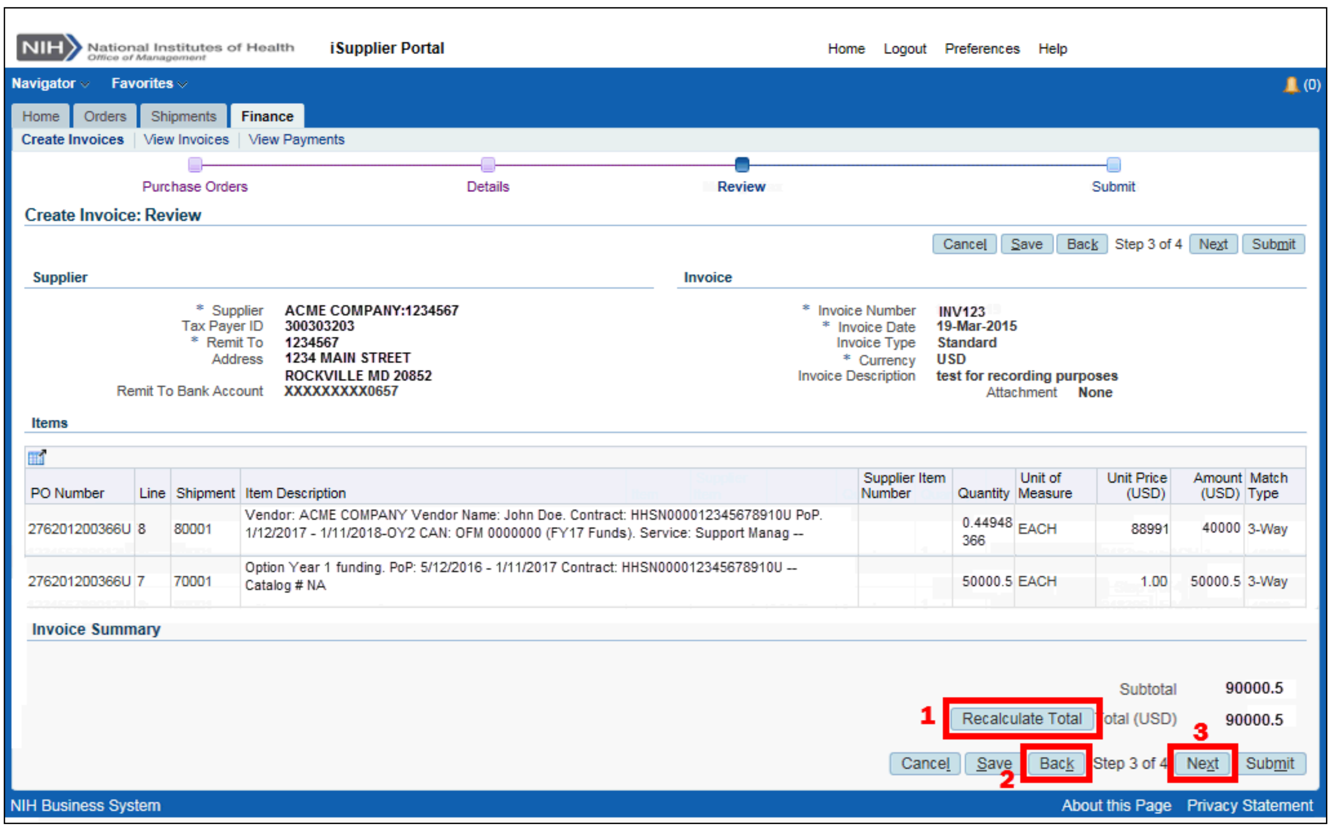
- Select **Next** (2) to continue.



Step 7: Review Invoice and Calculate Total

The **Create Invoice: Review** page displays.

- Review the invoice details. If you want to verify the total amount on the current invoice screen, select **Recalculate Total** (1) and the totals will update.
- If the details are not correct, select **Back** (2) to return to the previous page to edit the invoice details.
- Confirm by selecting **Next** (3).



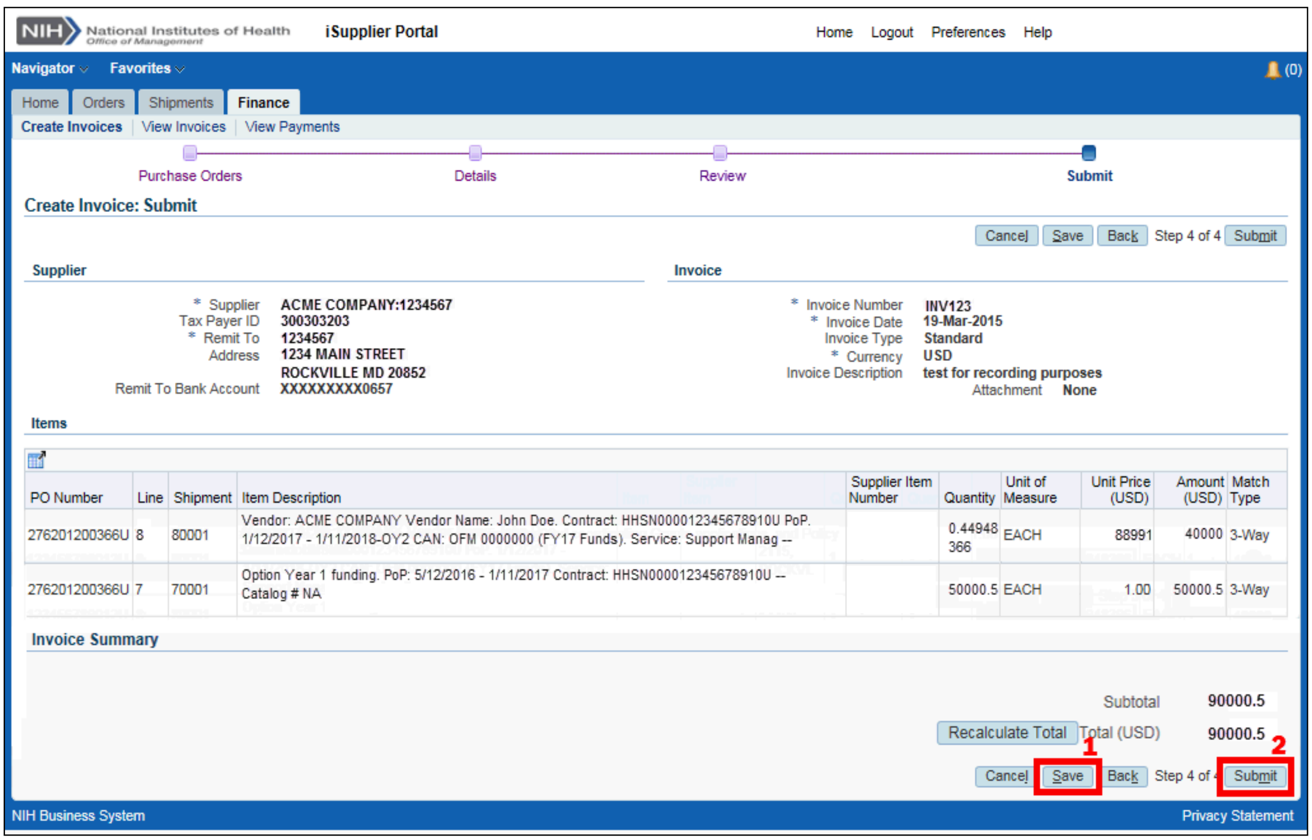
Step 8: Submit Invoice

The **Create Invoice: Submit** page displays.

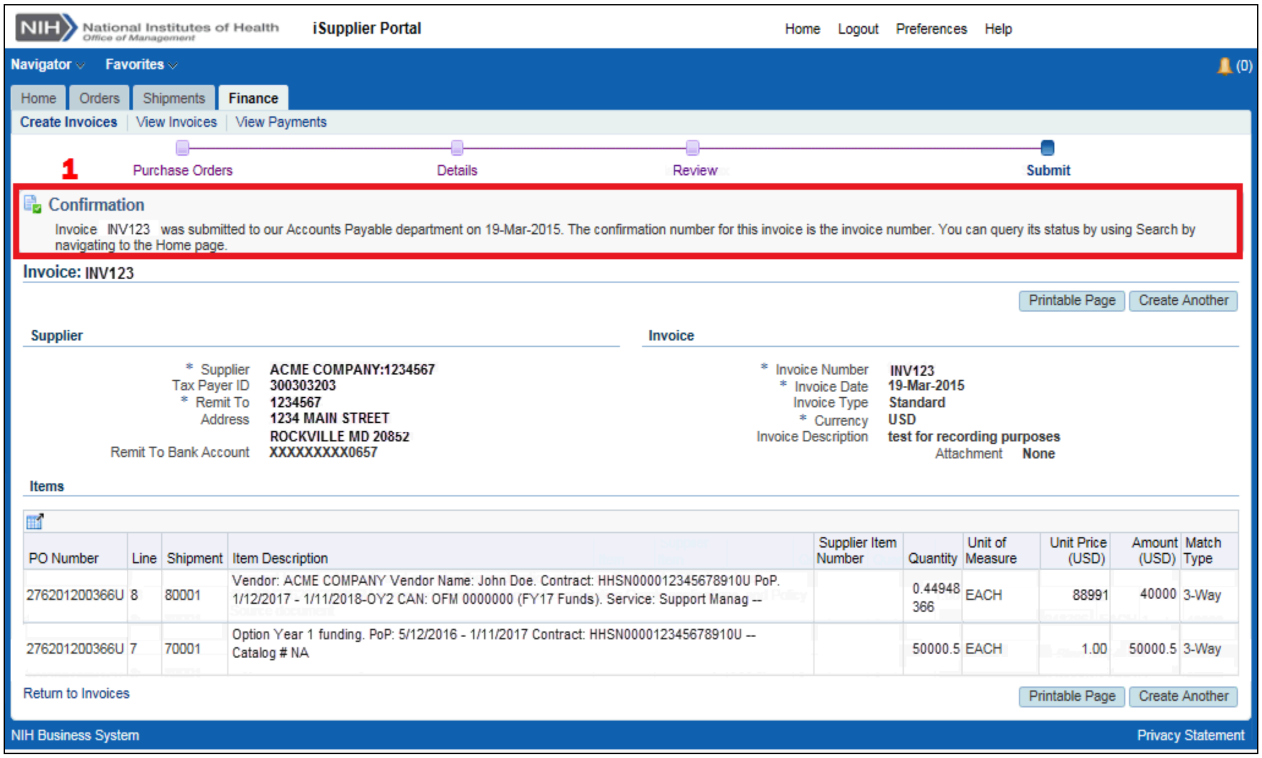
- Conduct a final review to ensure all details are correct prior to submitting the Invoice. If you'd like to save your progress and submit your invoice at a later time, select the **Save** (1) button. You can search for a previously saved invoice on the Finance tab by entering the saved invoice number in the search field.

- If you need to make changes to the invoice before submitting, select **Back.**

- Select **Submit** (2) to submit the invoice to NIH.



A **Confirmation** (1) message displays confirming that the Invoice was successfully submitted.



Need Help?

If you have any issues while submitting your invoice, please contact Vendor Support at (301) 496-6088.

HOURS OF OPERATION 8:30 a.m. to 4:30 p.m., EST Monday through Friday.

The office is closed each day from noon to 1:00 p.m.