

How to Create an Electronic Invoice in iSupplier

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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:

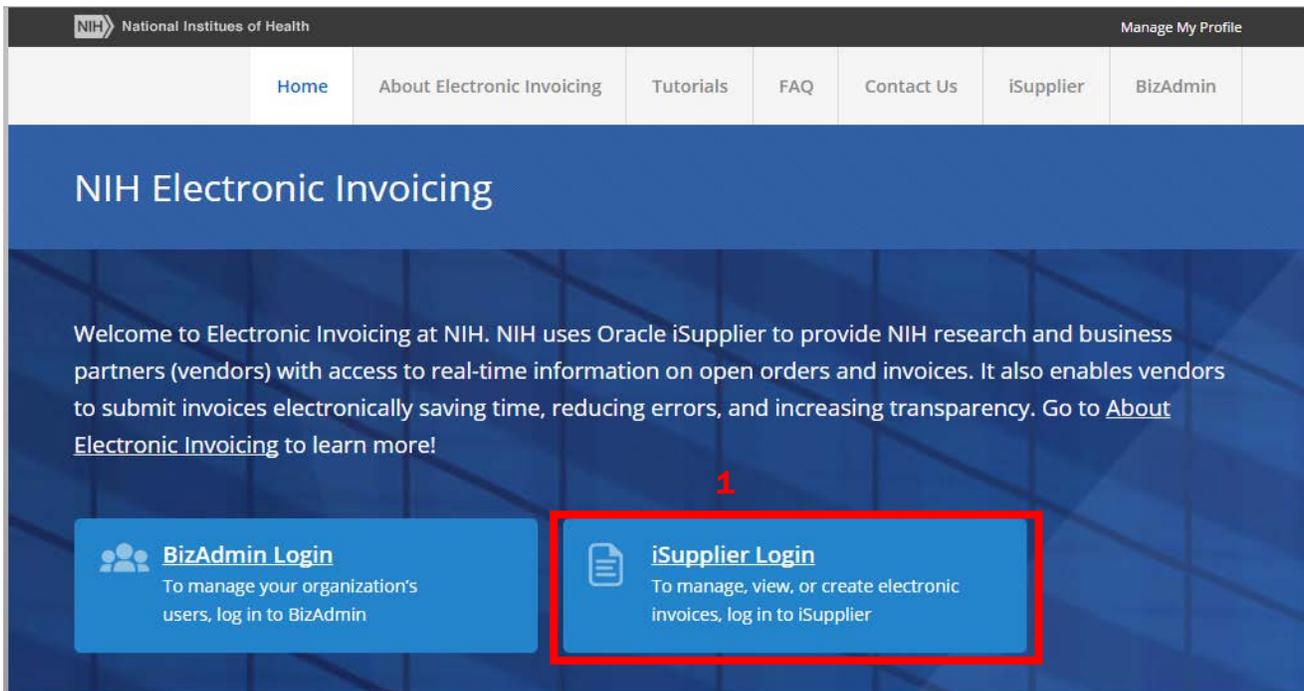
- 1) The Purchase Order (PO) number associated with the goods / services being invoiced, and Release number if it is a BPA or IDIQ.
- 2) Information to match the invoice to the relevant line number(s).
- 3) Required invoice details such as an invoice number, a detailed description of the goods or services 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.

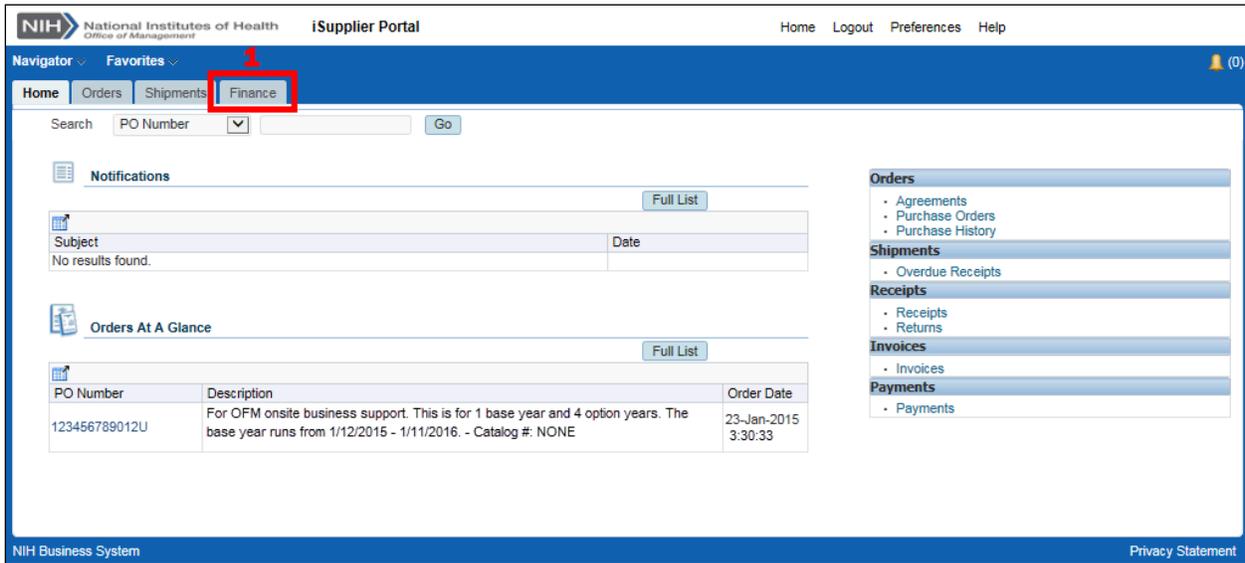
Step 1: Login to iSupplier

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).



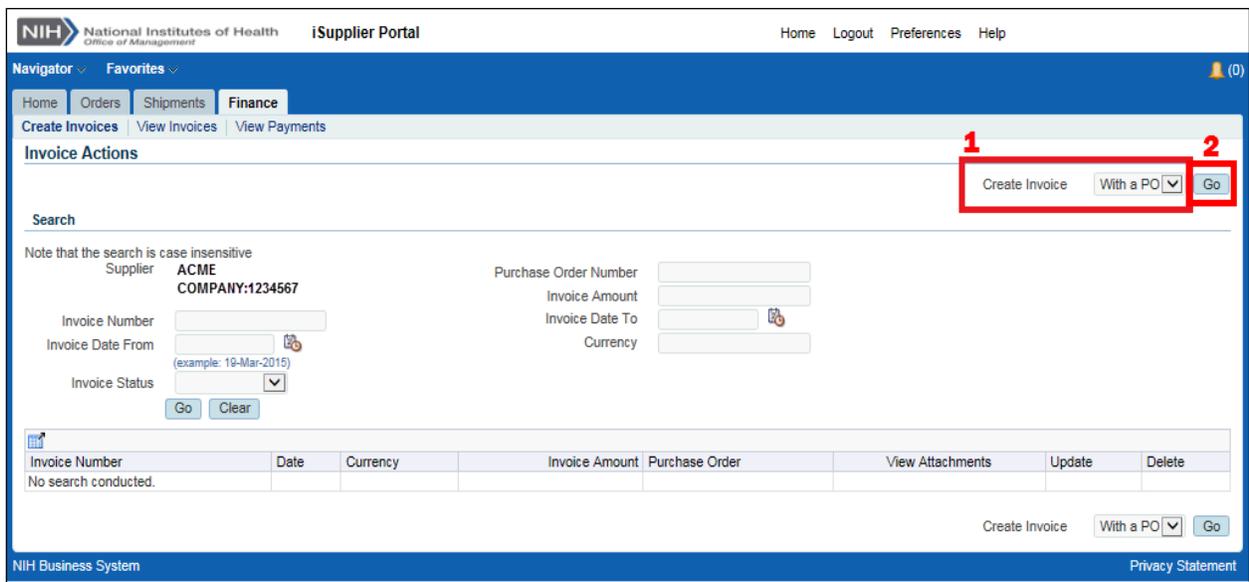
Step 2: Select Create an Invoice

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.**
- **Note:** 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.

The screenshot shows the NIH iSupplier Portal interface. At the top, there are navigation links for Home, Logout, Preferences, and Help. Below that, there are tabs for Home, Orders, Shipments, and Finance. The 'Finance' tab is active, and the sub-tab 'Create Invoices' is selected. A progress bar shows four steps: Purchase Orders, Details, Review, and Submit. The current step is 'Purchase Orders'.

The main content area is titled 'Create Invoice: Purchase Orders'. It includes a search form with the following fields:

- Purchase Order Number:** 123456789012U (highlighted with a red box and a red '1')
- Purchase Order Date:** (example: 19-Mar-2015)
- Buyer:** (dropdown menu)
- Organization:** NIH-OU (dropdown menu)

Below the search form are 'Go' and 'Clear' buttons. The 'Go' button is highlighted with a red box and a red '2'. There is also an 'Advanced Search' button.

The search results table is empty, showing 'No results found.' The table has the following columns: Select, PO Number, Line, Shipment, Item Description, Item Number, Supplier Item Number, Ordered, Received, Invoiced, UOM, Unit Price, Curr, Ship To, Match Type.

At the bottom of the page, there are links for 'Cancel', 'Step 1 of 4', and 'Next'.

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.

The screenshot shows the 'Create Invoice: Purchase Orders' workflow in the NIH iSupplier Portal. The search criteria are as follows:

- Purchase Order Number: 123456789012U
- Purchase Order Date: 19-Mar-2015
- Buyer: NIH-OU
- Organization: NIH-OU

The table below shows the search results for Purchase Order 123456789012U:

Select	* PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Match Type
<input type="checkbox"/>	123456789012U	1	10001	For OFM onsite business support. This is for 1 base year and 4 option years. The base year runs from 1/12/2015 - 1/11/2016. - Catalog #: NONE			312701.6	132246.74	160911.1	EACH	1	USD	2115, ROCKVL	3-Way
<input checked="" type="checkbox"/>	123456789012U	8	80001	Vendor: ACME COMPANY Vendor Name: John Doe. Contract: HHSN000012345678910U PoP. 1/12/2017 - 1/11/2018-OY2 CAN: OFM 0000000 (FY17 Funds). Service: Support Manag - Catalog #			1	1	0	EACH	88991	USD	2115, ROCKVL	3-Way
<input checked="" type="checkbox"/>	123456789012U	7	70001	Option Year 1 funding. PoP: 5/12/2016 - 1/11/2017 Contract: HHSN000012345678910U -- Catalog # NA			204350.5	204350.5	104350.5	EACH	1	USD	2115 E JEFFERS ON ST	3-Way

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.

Create Invoice: Details

* Indicates required field

Supplier: ACME COMPANY:1234567

1 * Remit To: 123456789

Address: 1234 Main Street, Rockville, MD 20852

Remit To Bank Account: [Search]

Discount Terms: [Dropdown]

Invoice:

* Invoice Number: [Field]

2 * Invoice Date: 19-Mar-2015 (example: 19-Mar-2015)

Invoice Type: Invoice

Currency: USD

* Invoice Description: [Field]

Attachment: None Add...

PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ship To	Quantity Received	Quantity Ordered	* Quantity to Invoice	UOM	Unit Price	Amount
123456789012U	8	80001	Vendor: ACME COMPANY Vendor Name: John Doe. Contract: HHSN000012345678910U PoP. 1/12/2017 - 1/11/2018-OY2 CAN: OFM 0000000 (FY17 Funds). Service: Support Manag -- Catalog #			2115, ROCKVL	1	1	0.44948366	EACH	88991	40000
123456789012U	7	70001	Option Year 1 funding. PoP: 5/12/2016 - 1/11/2017 Contract: HHSN000012345678910U -- Catalog # NA			2115 E JEFFERS ON ST	204350.5	204350.5	50000.5	EACH	1	50000.5

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JOB AID: How to Create an Electronic Invoice in iSupplier

- 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.

Create Invoice: Details
 * Indicates required field

Supplier: ACME COMPANY:1234567
 * Supplier: 123456789
 * Remit To: 1234 Main Street, Rockville, MD 20852

Invoice: 1 * Invoice Number, * Invoice Date: 19-Mar-2015, Invoice Type: Invoice, Currency: USD

2 * Invoice Description

3 Attachment: None [Add...]

PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ship To	Quantity Received	Quantity Ordered	* Quantity to Invoice	UOM	Unit Price	Amount
123456789012U	8	80001	Vendor: ACME COMPANY Vendor Name: John Doe. Contract: HHSN000012345678910U PoP: 1/12/2017 - 1/11/2018-OY2 CAN: OFM 0000000 (FY17 Funds). Service: Support Manag -- Catalog #			2115, ROCKVL	1	1	0.44948366	EACH	88991	40000
123456789012U	7	70001	Option Year 1 funding. PoP: 5/12/2016 - 1/11/2017 Contract: HHSN000012345678910U -- Catalog # NA			2115 E JEFFERS ON ST	204350.5	204350.5	50000.5	EACH	1	50000.5

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.

The screenshot shows the 'Create Invoice: Details' page in the NIH iSupplier Portal. The page is divided into sections for Supplier, Invoice, and Items. The Supplier section includes fields for Supplier (ACME COMPANY:1234567), Remit To (1234 Main Street, Rockville, MD 20852), and Remit To Bank Account. The Invoice section includes fields for Invoice Number, Invoice Date (19-Mar-2015), Invoice Type (Invoice), Currency (USD), and Invoice Description. The Items section contains a table with columns for PO Number, Line, Shipment, Item Description, Item Number, Supplier Item Number, Ship To, Quantity Received, Quantity Ordered, Quantity to Invoice, UOM, Unit Price, and Amount. Two items are listed: line 8 with a quantity ordered of 1 and a quantity to invoice of 0.44948366, and line 7 with a quantity ordered of 204350.5 and a quantity to invoice of 50000.5. A red box highlights the 'Quantity to Invoice' field for line 8, and another red box highlights the 'Next' button at the bottom right.

PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ship To	Quantity Received	Quantity Ordered	* Quantity to Invoice	UOM	Unit Price	Amount
123456789012U	8	80001	Vendor: ACME COMPANY Vendor Name: John Doe. Contract: HHSN000012345678910U PoP. 1/12/2017 - 1/11/2018-OY2 CAN: OFM 0000000 (FY17 Funds). Service: Support Manag - Catalog #			2115, ROCKVL	1	1	0.44948366	EACH	88991	40000
123456789012U	7	70001	Option Year 1 funding. PoP: 5/12/2016 - 1/11/2017 Contract: HHSN000012345678910U - Catalog # NA			2115 E JEFFERS ON ST	204350.5	204350.5	50000.5	EACH	1	50000.5

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).

Supplier

* Supplier: ACME COMPANY:1234567
 * Tax Payer ID: 300303203
 * Remit To Address: 1234 MAIN STREET, ROCKVILLE MD 20852, XXXXXXXXXXX0657
 Remit To Bank Account: XXXXXXXXXXX0657

Invoice

* Invoice Number: INV123
 * Invoice Date: 19-Mar-2015
 * Invoice Type: Standard
 * Currency: USD
 Invoice Description: test for recording purposes
 Attachment: None

PO Number	Line	Shipment	Item Description	Supplier Item Number	Quantity	Unit of Measure	Unit Price (USD)	Amount (USD)	Match Type
276201200366U	8	80001	Vendor: ACME COMPANY Vendor Name: John Doe. Contract: HHSN000012345678910U PoP: 1/12/2017 - 1/11/2018-OY2 CAN: OFM 0000000 (FY17 Funds). Service: Support Manag --		0.44948366	EACH	88991	40000	3-Way
276201200366U	7	70001	Option Year 1 funding. PoP: 5/12/2016 - 1/11/2017 Contract: HHSN000012345678910U -- Catalog # NA		50000.5	EACH	1.00	50000.5	3-Way

Invoice Summary

Subtotal: 90000.5
 Total (USD): 90000.5

Buttons: **1** Recalculate Total, **2** Back, **3** Next, Cancel, Save, Submit

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.

NIH National Institutes of Health Office of Management **iSupplier Portal** Home Logout Preferences Help

Navigator Favorites (0)

Home Orders Shipments **Finance**

Create Invoices View Invoices View Payments

Purchase Orders Details Review **Submit**

Create Invoice: Submit Cancel Save Back Step 4 of 4 **Submit**

Supplier		Invoice	
* Supplier	ACME COMPANY:1234567	* Invoice Number	INV123
Tax Payer ID	300303203	* Invoice Date	19-Mar-2015
* Remit To	1234567	Invoice Type	Standard
Address	1234 MAIN STREET	* Currency	USD
Remit To Bank Account	ROCKVILLE MD 20852	Invoice Description	test for recording purposes
	XXXXXXXXXX0657	Attachment	None

PO Number	Line	Shipment	Item Description	Supplier Item Number	Quantity	Unit of Measure	Unit Price (USD)	Amount (USD)	Match Type
276201200366U	8	80001	Vendor: ACME COMPANY Vendor Name: John Doe. Contract: HHSN000012345678910U PoP. 1/12/2017 - 1/11/2018-OY2 CAN: OFM 0000000 (FY17 Funds). Service: Support Manag --		0.44948366	EACH	88991	40000	3-Way
276201200366U	7	70001	Option Year 1 funding. PoP: 5/12/2016 - 1/11/2017 Contract: HHSN000012345678910U -- Catalog # NA		50000.5	EACH	1.00	50000.5	3-Way

Invoice Summary

Subtotal 90000.5

Recalculate Total Total (USD) 90000.5

Cancel **Save** Back Step 4 of 4 **Submit**

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

Confirmation
 Invoice INV123 was submitted to our Accounts Payable department on 19-Mar-2015. The confirmation number for this invoice is the invoice number. You can query its status by using Search by navigating to the Home page.

Invoice: INV123

Supplier: ACME COMPANY:1234567
 Tax Payer ID: 300303203
 Remit To Address: 1234 MAIN STREET, ROCKVILLE MD 20852, XXXXXXXXX0657

Invoice: INV123
 Invoice Date: 19-Mar-2015
 Invoice Type: Standard
 Currency: USD
 Invoice Description: test for recording purposes
 Attachment: None

PO Number	Line	Shipment	Item Description	Supplier Item Number	Quantity	Unit of Measure	Unit Price (USD)	Amount (USD)	Match Type
276201200366U	8	80001	Vendor: ACME COMPANY Vendor Name: John Doe. Contract: HHSN000012345678910U PoP. 1/12/2017 - 1/11/2018-OY2 CAN: OFM 0000000 (FY17 Funds). Service: Support Manag --		0.44948366	EACH	88991	40000	3-Way
276201200366U	7	70001	Option Year 1 funding. PoP: 5/12/2016 - 1/11/2017 Contract: HHSN000012345678910U -- Catalog # NA		50000.5	EACH	1.00	50000.5	3-Way

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.