

How to Search for Invoice Status and Other Invoice Detail

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Overview

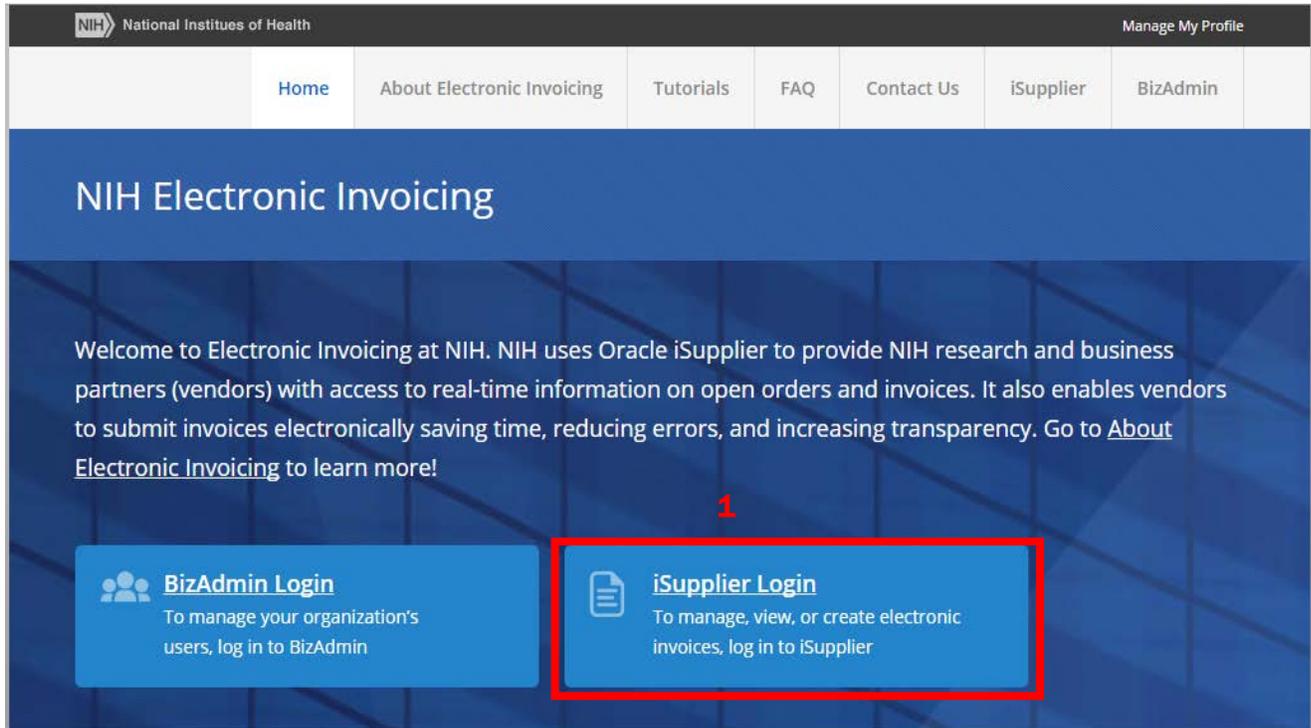
This job aid reviews how to look up the details of an invoice including its specific status, any holds placed on it, how it was matched across PO lines, potential cancellation reasons, and who to contact with questions.

The fastest way to look up this information is with the Invoice Number. If you don't have an invoice number, you can also look up a history of all invoices associated with a particular Purchase Order. Please review the Job Aid “How to Search for and Export the Invoice History of a Purchase Order” on the <https://evip.nih.gov> website.

Note that iSupplier refers to all types of agreements (i.e. Awards, Contracts, TODOs, BPAs, IDIQs, and Orders) as “**Purchase Orders**”.

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: Search for an Invoice

Select the **Invoices** link from the menu panel to search for information about a particular invoice such as its status, any holds or cancellation reasons, how it was matched, who to contact with questions, etc.

The screenshot shows the NIH iSupplier Portal interface. At the top, there is a navigation bar with the NIH logo, "National Institutes of Health Office of Management", and "iSupplier Portal". To the right of the logo are links for "Home", "Logout", "Preferences", "Help", and "Diagnostics". Below the navigation bar is a "Navigator" section with tabs for "Home", "Orders", "Shipments", and "Finance". A search bar is located below the tabs, with a dropdown menu set to "PO Number" and a "Go" button. The main content area is divided into several sections: "Notifications" (with a "Full List" button), "Orders At A Glance" (with a "Full List" button), and a table of orders. The table has columns for "PO Number", "Description", and "Order Date". The first row shows PO Number 123456789012U and Order Date 23-Jan-2015 3:30:33. On the right side, there is a vertical menu with sections for "Orders", "Shipments", "Receipts", "Invoices", and "Payments". The "Invoices" section is highlighted with a red box and a red number "1" next to it.

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JOB AID: How to Search for Invoice Status and Other Invoice Detail

The **View Invoices** page displays and allows you to research invoice summary information.

- To research an existing invoice, enter the number of the invoice for which you want to search in the **Invoice Number** (1) field. You can also search with any of the other fields and find your invoice number in the results.
- **Note:** The search fields on this page are **case sensitive**. Oracle requires a character to be entered into at least one search field before it will display results. To view a list of ALL submitted invoices, enter a % sign in the **Invoice Number** search field.
- Select **Go** (2).

The screenshot displays the NIH iSupplier Portal interface. At the top, there is a navigation bar with 'Home', 'Logout', 'Preferences', 'Help', and 'Diagnostics'. Below this is a 'Navigator' section with tabs for 'Home', 'Orders', 'Shipments', and 'Finance'. The 'View Invoices' page is active, showing a search form. The 'Invoice Number' field is highlighted with a red box and a red '1', containing the text 'INV123'. The 'Go' button is highlighted with a red box and a red '2'. Below the search form is a table with columns for Invoice, Type, Description, Invoice Date, PO Number, PO Details, Invoice Source, Invoice Amount, Amount Due, Due Date, Available Discount, Discount Date, Status, Payment Number, Attachments, Payment Terms, Action History/Reason Codes, and Markview Invoice Images. The table currently shows 'No search conducted.'

Step 3: Review Invoice Summary Information

- The search results will return invoice summary information:
 - **Invoice, Description and Invoice Date** show the information entered when the invoice was created.
 - **PO Number** provides a link to information about the associated PO.
 - **PO Details** provides a link that shows additional invoice detail such as how it was matched. Note the numbers in this column are internal NIH generated numbers.
 - **Invoice Source** indicates whether the invoice was a manually submitted paper invoice or electronically submitted through iSupplier.
 - **Invoice Amount** is what was invoiced.
 - **Amount Due** is the amount of pending payment, if it is 0 then the invoice has either been paid or cancelled.
 - **Status** shows invoice status and will say either **Approved, On Hold, or Cancelled**. Electronic invoices cannot be partially paid, so if there are any unpayable charges the invoice will be cancelled and must be resubmitted without the unpayable charges.
 - **Payment Number** will display for tracking purposes if the invoice has been paid. If it has not yet been paid, this field will be blank.
- To change the way that the information is sorted, select a raised column heading.
- **Note:** You may select **Export** (1) at the top or bottom of any screen to export the displayed information into an excel file that can be saved and / or shared.
- **Scroll** (2) to the right of the table to view more information.

The screenshot displays the NIH iSupplier Portal interface. At the top, there are navigation links: Home, Logout, Preferences, Help, and Diagnostics. Below this is a 'Navigator' section with tabs for Home, Orders, Shipments, and Finance. The 'View Invoices' section includes a search form with various filters and a table of results. The table has the following data row:

Invoice	Type	Description	Invoice Date	PO Number	PO Details	Invoice Source	Invoice Amount	Amount Due	Due Date	Available Discount	Discount Date	Status	Payment Number	Attach
INV123	Standard	Professional Services for the Period: July 01, 2014 to July 31, 2014	15-Apr-2014	123456789012U	7654321	iSupplier	13454.67	0.00	15-MAY-2014			Approved	40088855	

Step 4: Review Invoice “Action History/Reason Codes” for Status and Cancellation Reasons

- The **Action History/Reason Codes** is very helpful to view additional detail if the status of your invoice is On Hold or Cancelled.
- Select the **Action History/Reason Codes (1)** icon to open the table.

The screenshot shows the NIH iSupplier Portal interface. At the top, there are navigation links: Home, Logout, Preferences, Help, and Diagnostics. Below that is a 'Navigator' and 'Favorites' section. The main content area is titled 'View Invoices' and includes an 'Export' button. A 'Simple Search' section contains various input fields for Invoice Number (INV123), PO Number, Release Number, Invoice Status, Gross Amount, and Amount Due. An 'Advanced Search' button is also present. Below the search filters is a table of invoices. The table has columns for Date, PO Number, PO Details, Invoice Source, Invoice Amount, Amount Due, Due Date, Available Discount, Discount Date, Status, Payment Number, Attachments, Payment Terms, Action History/Reason Codes, and Markview Invoice Images. The first row of the table is highlighted, and the 'Action History/Reason Codes' column contains a red square icon with the number '1' above it, indicating one record.

Date	PO Number	PO Details	Invoice Source	Invoice Amount	Amount Due	Due Date	Available Discount	Discount Date	Status	Payment Number	Attachments	Payment Terms	Action History/Reason Codes	Markview Invoice Images
:014	123456789012U	7654321	iSupplier	13454.67	0.00	15-MAY-2014			Approved	40088855		PROMPT PAY		

The **Invoice Action History** page will open.

- The **Invoice Status** (1) table shows where the invoice is in the review / approval process, including dates, the current step in the process, and the group or individual who is responsible for that step.
- All invoices over \$100,000 and a random 1% sample of invoices under \$100,000 will go through a Quality Assurance Process which, if applicable, will be reflected in the Action History table.
- If your invoice was cancelled you can locate cancellation reasons in the **Cancel/Disallow Reason** (2) section.
- **Close** this tab to return to the previous page.

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Navigator Favorites (0)

Invoice Action History

Vendor Name ACME COMPANY:1234567
Invoice No INV123

Invoice Status 1

Date	Status	Performer
15-Apr-2014 13:01:09	Approved	

Cancel/Disallow Reason 2

Reasons
No results found.

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Step 5: Review Line Level, Payment and Hold Details

- Select the **Invoice Number** link in the table to view detailed information for that invoice, such as how it was matched at the line level, scheduled payments, and specific hold reasons if your invoice is on hold.
- Select the **INV123 (1)** link.

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

Navigator Favorites (0)

Home Orders Shipments **Finance**

Create Invoices **View Invoices** View Payments

View Invoices Export

Simple Search Advanced Search

Invoice Number: INV123 PO Number:
 Payment Number: PO Number: (example : 1234)
 Invoice Status: Release Number:
 Gross Amount From: To: Payment Status:
 Amount Due From: To: Invoice Date From: To:
 Due Date From: To: (example: 29-Apr-2015)

Go Clear

Invoice	Type	Description	Invoice Date	PO Number	PO Details	Invoice Source	Invoice Amount	Amount Due	Due Date	Available Discount	Discount Date	Status	Payment Number	Attac
1 INV123	Standard	Professional Services for the Period: July 01, 2014 to July 31, 2014	15-Apr-2014	123456789012U	7654321	iSupplier	13454.67	0.00	15-MAY-2014			Approved	40088855	

Export

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Review Invoice Line Details

- This page shows detailed information about the invoice.
- It will open to the **Invoice Lines** (1) tab. The Invoice Lines table shows how the invoice was matched at the line level.
- The status field is at the line level. You can select the PO Number link or the Contract Officer link for additional information.
- Select the **Scheduled Payments** (2) tab to see payment status.

Standard Invoice: INV123 (Total USD 13454.67)
Currency=USD

General		Amount Summary		Payment Information	
Invoice Date	15-Apr-2014	Item	13454.67	Paid	13454.67
Status	Approved	Freight	0.00	Discount Taken	0.00
On Hold		Miscellaneous	0.00	Due	0.00
Batch	ISP20140415130000	Tax	0.00	Status	Paid
Attachments	View	Prepayment	0.00	Payment Date	28-APR-2014
Supplier	ACME Company	Retainage	0.00	Payment	40088855
Supplier Site	1234567	Withholding Tax	0.00	Term	PROMPT PAY
Address	1234 MAIN STREET ROCKVILLE, MD 20852	Total	13454.67		

1 Invoice Lines **2** Scheduled Payments Hold Reasons

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Contracting Officer	Receipt
1	Item	For OFM onsite business support. (Period of Performance 7/31/2015 to 7/30/2016)	15500.88	EACH	1.00		15500.88	0.00	Approved	123456789012U	1	10001	BROWN, ANITA	

Review Scheduled Payments

- The **Scheduled Payments** (1) tab shows information about payments.
- Check the **Status** column for payment status. This invoice has been fully paid.
- If any of the invoice lines are on hold, select the **Hold Reasons** (2) tab for more information.

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Home Orders Shipments **Finance**

Create Invoices View Invoices View Payments

Standard Invoice: INV123 (Total USD 13454.67)

Currency=USD Export

General		Amount Summary		Payment Information	
Invoice Date	15-Apr-2014	Item	13454.67	Paid	13454.67
Status	Approved	Freight	0.00	Discount Taken	0.00
On Hold		Miscellaneous	0.00	Due	0.00
Batch	ISP20140415130000	Tax	0.00 (i)	Status	Paid
Attachments	View	Prepayment	0.00	Payment Date	28-APR-2014
Supplier	ACME Company	Retainage	0.00	Payment	40088855
Supplier Site	1234567	Withholding Tax	0.00	Term	PROMPT PAY
Address	1234 MAIN STREET ROCKVILLE, MD 20852	Total	13454.67		

Invoice Lines **1** Scheduled Payments Hold Reasons **2**

Due Date	Amount	Remaining Amount	Remit-to Supplier	Remit-to Supplier Site	Status	Method
15-May-2014	15500.88	0.00			Fully Paid	Electronic

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Review Hold Reasons

- The **Hold Reasons** (1) tab shows historical and current reasons for invoice holds. If the invoice is on an active hold, then the release date field will be blank. If a hold has been released, then the associated dates of release will be listed.
- The two holds shown in this example will be automatically applied for almost every invoice as it goes through the review / approval process. If other holds are placed during the process they will also be listed.
- If you have any status questions, please contact your Contract Officer, Buyer, IC Vendor Specialist, or look up the specific status step of the invoice in the Action History Table to find the corresponding individual or group responsible.

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Home Orders Shipments Finance

Create Invoices View Invoices View Payments

Standard Invoice: INV123 (Total USD 13454.67)
Currency=USD

General		Amount Summary		Payment Information	
Invoice Date	15-Apr-2014	Item	13454.67	Paid	13454.67
Status	Approved	Freight	0.00	Discount Taken	0.00
On Hold		Miscellaneous	0.00	Due	0.00
Batch	ISP20140415130000	Tax	0.00	Status	Paid
Attachments	View	Prepayment	0.00	Payment Date	28-APR-2014
Supplier	ACME Company	Retainage	0.00	Payment	40088855
Supplier Site	1234567	Withholding Tax	0.00	Term	PROMPT PAY
Address	1234 MAIN STREET ROCKVILLE, MD 20852	Total	13454.67		

Export

Invoice Lines Scheduled Payments **Hold Reasons**

Hold Name	Hold Reason	Hold Date	Release Name	Release Reason	Release Date
EVIP_APPROVAL_REQUIRED	Invoice on OFM Research	15-Apr-2014	Invoice Approval Workflow Release	Approval Workflow Completed	15-Apr-2014
EVIP_HOLD	Invoice on OFM Research	15-Apr-2014	Invoice Approval Workflow Release	Approval Workflow Completed	15-Apr-2014

Export

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Need Help?

If you have any issues while searching for invoice information, 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.