iPayables Tips and Tricks

Table of Contents

How to Access iPayables	2
Open More than One Invoice in Your Approval List	3
Turn on Auto-Coding	3
What to Look for in an Invoice	4
How to Dispute an Invoice	4
Resolve Issues Such as Routing Errors	6
How to Fill out the Description	7
How to Add More than One set of Coding	7
What to do When I Will Be on Vacation	9
What to do When I Receive an Invoice Directly from a Vendor	10
How to Get Help while Processing an Invoice	10

*Click on each title above to go directly to that topic.

How to Access iPayables

You can access iPayables one of two ways:

1. Via the email notification sent to you when you have an invoice to approve:

Subject: ACTION REQUESTED: AP - Invoice Pending Notification

WARNING: This email originated from outside Northwest Kidney Centers.

Do you recognize the sender's email address? Were you expecting this email? If the answer is no, do not open any attachments or click on links within the email.

InvoiceWorks - Invoice Requiring Your Action

The following invoice has been submitted for your review, coding and/or approval:

Customer: Northwest Kidney Centers Vendor: Spectrotel Invoice Number: 12819317 Invoice Date: 02/15/2025 P.O. Number: Invoice Total: 356.10

To sign into InvoiceWorks, click the link below:

https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Fsaml.ipayables.net%2FDefault.aspx%3FCustomerID%3DC0000657%26Community%3DIATA&data=05%7C02%7Cwilhelm.pettersson%40nwkidney.org%7Cfe42e6ed08e140649ee908dd4fd9cf9c%7C30327d25c1b2429d910230665160a7bc% 7C0%7C0%7C638754519120717194%7CUnknown% 7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsllYiOilwLjAuMDAwMCIsILAiOiJXaW4zMilsIkFOIjoiTWFpbCIsILdUIjoyfQ%3D%3D%7C0%7C%7C% 7C&sdata=1vSo0UluX%2F1DuJtPagjhnkCgujWTI6I09Uu6zCeXjxA%3D&reserved=0

For technical problems with the InvoiceWorks system, contact the Help Desk at InvoiceWorks.Support@iPayables.com or by phone at 801-224-8300.

PLEASE DO NOT REPLY TO THIS AUTOMATED MESSAGE

2. From the Okta dashboard select OnPhase iPayables

My Apps					Sort 🗸
⊘ Applications					
salesforce	Æ	0	ф.	C	•
Salesforce	ADP for Admins	1Password	NKC Okta Central	Clarity	Outlook Online
ക	/. monday.com	=	R Policy Stat	Æ	KnowBe4 Human error. Conquered.
Remote Support (GoToAssist)	Monday.com	Scribe	PolicyStat	ADP	KnowBe4
XM	onPhase				
Currupy (Ourthring)	On Dhanna i Deurah Ing				
Surveys (Qualtrics)	Onenase reayables				

Open More than One Invoice in Your Approval List

If you have more than one invoice in your list, you can make it easier to move through them by opening up to 15 invoices.

1. In your worklist click this button on the lower middle part of the screen



- 2. You'll see it highlight up to 15 invoices then will bring you to the first invoice.
- 3. Complete all required fields and click the thumbs up button to approve it.



4. When you approve an invoice, it will automatically bring up the next one without having to go back to your approval worklist.

Turn on Auto-Coding

iPayables can predict what coding you will use for an invoice based on previous entries. To turn on this feature, do the following steps. *You only need to do this once*, not for each invoice.

1. In any invoice, under Distributions, go to the Entity section and click on the Gear:



2. Click "My History per Vendor" then click Confirm



3. Repeat Steps 1 and 2 for Department, GL Acct, Restrictions, Site, and Program

Distri	ibutions											
#	Entity	Department		GL Acct		Restrictions		Site		Program	_	Total
1-	Search 🗸	Search	٠	Search	٠	Search	٠	Search	٠	Search	٠	2,172.00

4. You'll know everything is set up as there will now be check marks rather than gears.

Distr	ibutions						
#	Entity	Department	GL Acct	Restrictions	Site	Program	Total
1+	Search 🗸	Search 🗸	Search 🗸	Search 🗸	Search 🗸	Search 🗸	2,172.00

What to Look for in an Invoice

Review invoice carefully, you must look at the amount due and include only the *current* charges. If there is a prior/previous/past due amount, only pay what is current and send a message in the Issue tab to Pamela Trask. Do not deny the invoice or click the thumbs down button.

d	4	American	1720 LAKEPOINT DR STE 1 LEWISVILLE, TX 75057	00	Account Name: Northwest	Kidney Centers 804		
		Wiessaging	For All Inquiries: 888 20	60-3801 F	AYMENT DUE: Net 30 D)ays		- 11
		Please send written corr	PO#: ease send written correspondence that is not payment related to the address above. Page 1 of 3					
		Invoice Number	Invoice Date	Prior Balance	Payments	Current Charges	Amount Due	
iir gi		W4101804ZB	02/01/25	\$343.15	\$0.00	\$430.84	\$773.99	
rc		Number	Description	Account Activity Amount				

How to Dispute an Invoice

Do not click the thumbs down button. This removes the invoice from the system. Instead, report it as an issue.

1. Go to the top right part of the invoice screen and select Issues.



2. Click on the down arrow next to Create New Issue

_				
	Related Documents	History	Approval Stops	Issues
	Validation Errors (5) I←			
	Notes			-
	Vendor Notes		Approver Notes	
	Contact Name:		Phone:	
	Email:			
		••	•	
	Create New Issue			~⊠

3. If you don't see Pamela Trask, Embony Boyd, and Sa Tonnu, add them by clicking Add User to Message and search by typing their names into User Search.

Create New Issue	^⊠
Recipients	
Select All	
Heidi Lee (Heidi.Lee)	
Wilhelm Pettersson (Wilhelm.Pettersson)	
Pamela Trask (Pamela.Trask)	
User Search	×

- 4. Check their names, enter a Subject and Message. Check the box for Place Invoice in Dispute and click the Green Checkmark to submit.
- 5. Note the invoice will stay in your worklist until you are ready to approve

Recipients Select All Heidi Lee (Heidi.Lee) Wilhelm Pettersson (Wilhelm.Pettersson) Pamela Trask (Pamela.Trask) Embony Boyd (Embony.Boyd) Sa Tonnu (Sa.Tonnu) Add User To Message Subject* Other Dispute	
Select All Heidi Lee (Heidi.Lee) Wilhelm Pettersson (Wilhelm.Pettersson) Pamela Trask (Pamela.Trask) Embony Boyd (Embony.Boyd) Sa Tonnu (Sa.Tonnu) Add User To Message Subject* Other Dispute Message*	
Heidi Lee (Heidi.Lee) Wilhelm Pettersson (Wilhelm.Pettersson) Pamela Trask (Pamela.Trask) Embony Boyd (Embony.Boyd) Sa Tonnu (Sa.Tonnu) Add User To Message Subject* Other Dispute Message*	
 Wilhelm Pettersson (Wilhelm.Pettersson) ✓ Pamela Trask (Pamela.Trask) ✓ Embony Boyd (Embony.Boyd) ✓ Sa Tonnu (Sa.Tonnu) Add User To Message Subject* Other ✓ Dispute Message* 	
Pamela Trask (Pamela.Trask) Embony Boyd (Embony.Boyd) Sa Tonnu (Sa.Tonnu) Add User To Message Subject* Other Dispute Message*	
Embony Boyd (Embony.Boyd) Sa Tonnu (Sa.Tonnu) Add User To Message Subject* Other Dispute Message*	
Sa Tonnu (Sa.Tonnu) Add User To Message Subject* Other Message*	
Add User To Message Subject* Other Message*	
Subject* Other Dispute Message*	
Message*	
The amount due is incorrect.	
Place Invoice In Dispute *Requ	10
	//

Resolve Issues Such as Routing Errors

For any issues you'll follow similar steps as for disputing an invoice. A common issue is that an invoice was routed to you, but you are not the

1. Go to the top right part of the invoice screen and select Issues.



2. Click on the down arrow next to Create New Issue

Related Documents	History	Approval Stops	Issues
Validation Errors (5) I←			
Notes			•
Vendor Notes		Approver Notes	
Contact Name:		Phone:	
Email:			

Create New Issue			~≥

3. If you don't see Pamela Trask, Embony Boyd, and Sa Tonnu, add them by clicking Add User to Message and search by typing their names into User Search.

Create New Issue	^⊠
Recipients	
Select All	
Heidi Lee (Heidi.Lee)	
 Wilhelm Pettersson (Wilhelm.Pettersson) 	
Pamela Trask (Pamela Trask)	
User Search	×

4. Check their names, enter a Subject and Message. Do NOT select to place invoice in dispute. Click the Green Checkmark to submit.

Create New Issue	~
Recipients	
 Heidi Lee (Heidi.Lee) Wilhelm Pettersson (Wilhelm.Pettersson) Pamela Trask (Pamela.Trask) Embony Boyd (Embony.Boyd) Sa Tonnu (Sa.Tonnu) Add User To Message 	
Subject* Other Virong approver	
Message* I am not the approver for this invoice	le.
Place Invoice In Dispute	*Required Field

5. Note the invoice will stay in your worklist until it is re-routed. Do not approve it.

How to Fill out the Description

In the Description field, delete what is there and describe what the service is for and what unit it is for. For example: Water Burien. Note there is a 35 character limit on the description.

How to Add More than One set of Coding

If the Invoice should have more than one set of coding, you'll want to add distribution lines.

1. Under the coding, click on Add Distribution. You can accept the default of 1, or type in the number of additional lines needed.

Distri	ibutions	
#	Entity	Department
1•	100-Northwe 🗸	8745-Health I 🗸
Add D	istributions 1	+

2. For each distribution line, fill out the coding and specify in the Total column what amount should be applied for each distribution.

Distri	ibutions						
#	Entity	Department	GL Acct	Restrictions	Site	Program	Total
1-	100-Northw 🗸	8745-Health	6639-Accre 🗸	10-Unrestricta 🗸	50-Auburn F 🗸	10-Healthca 🗸	1,000.00
2 -	100-Northw +	Search +	Search +	10-Unrestrict +	Search +	Search +	500.00
3 🕶	100-Northw +	Search +	Search +	10-Unrestrict +	Search +	Search +	750.00
4 -	100-Northw +	Search +	Search +	10-Unrestrict +	Search +	Search +	760.00
Add Distributions 🗵 🗘 + Distribution Subtota					Subtotal 3,010.00		
	Payment Currency United States of America Dollars (USD)		ca Dollars (USD)		Line Su	b Total	3,000.00
						Tax	0.00 +
Freight					0.00		
					То	tal Due	3,000.00

3. Below the Total column there is a field called Distribution Subtotal that shows what all the distributions you've entered add up to. If the Distribution Subtotal does not equal the Total Due, adjust your entries in the Total column until it does.

Distri	ibutions						
#	Entity	Department	GL Acct	Restrictions	Site	Program	Total
1+	100-Northw 🗸	8745-Health	6639-Accre 🗸	10-Unrestrict	50-Auburn F 🗸	10-Healthca 🗸	1,000.00
2 -	100-Northw +	Search +	Search +	10-Unrestrict +	Search +	Search +	500.00
3 🕶	100-Northw +	Search +	Search +	10-Unrestrict +	Search +	Search +	750.00
4+	100-Northw +	Search +	Search +	10-Unrestrict +	Search +	Search +	760.00
Add Distributions 😰 🌩 +						Subtotal 3,010.00	
Payment Currency United States of America Dollars (USD) Line Sub Total					3,000.00		
					Тах	0.00 +	
						Freight	0.00
					Т	otal Due	3,000.00

What to do When I Will Be on Vacation

You can set up iPayables to route your invoices to another person while you're out of the office.

1. Click on the Person icon in the very top right corner



2. Select User Profile



3. Click on the Workflow icon on the left



4. In the middle of the box, select the person who will approve on your behalf. Make sure they have agreed to this task while you are out.

Vacation Reroute				
Approver	Search			

5. Fill out From and To dates

Vacation Reroute					
Approver	Jeff Abrams				
Email jeff.abrams@nwkidney.org					
Department	Accounting				
From m/d/yyyy	🗎 To <i>m/d/yyyy</i>				
You must select a Vacation Reroute From Date and To Date if Approver is filled out.					

6. Click Apply in the bottom right corner



7. iPayables will automatically turn on the re-routing and turn it off on the days you specified. You will not need to turn it off yourself.

What to do When I Receive an Invoice Directly from a Vendor

- 1. If you receive a non-PO invoice directly from a vendor, make sure it is in a pdf format then forward it to <u>ap@nwkidney.org</u> Don't send anything other than non-PO invoices.
- 2. Statements and past due invoices should be sent to accounting@nwkidney.org.
- 3. All other inquiries should be directed to accounting@nwkidney.org.

How to Get Help while Processing an Invoice

If you need help in iPayables, you have two options:

1. Click on the ? in the top right corner



2. There will be a pop up with 2 options.

a. Click on Help Documentation to open a new tab in the browser. The tab will contain information pertinent to the page you are on.

Help Documentation Contact Support						
on Phase A	P Approval Worklist ~					
Approval Worklist						
This page contains a list of invoices that are pending your approval.						
O DOCUPHASE AP Test IF	Approval Worklist ~					
Filters 🗸	Invoices 🗅					
Invoice Assigned To	Invoice Number Vendor Name Dusiness Unit					
Name Admin X	test12002022_2					
Business Unit						
~						
Location						

b. Clicking on Contact Support will produce a popup with options on contacting iPayables' support team. If you choose Online Chat then a new window will pop up and you can follow the instructions there.



Contact AP Support	
Email us at invoiceworks.support@ipayables.com	
Online Chat	
Phone Call us at 1-801-224-8300 (Long distance fees may apply)	
Cancel	