iPayables Tips and Tricks

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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

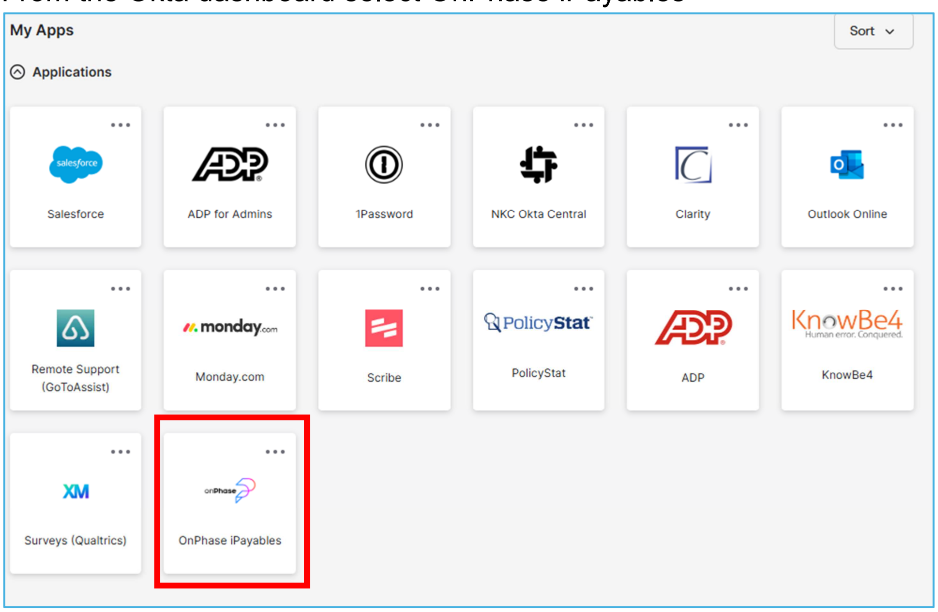
To sign into InvoiceWorks, click the link below:

https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Fsaml.ipayables.net%2FDefault.aspx%3FCustomerID%3DC0000657%26Commu-nity%3DIATA&data=05%7C02%7Cwilhelm.pettersson%40nwkidney.org%7Cfe42e6ed08e140649ee908dd4fd9cf9c%7C30327d25c1b2429d910230665160a7bc%7C0%7C0%7C638754519120717194%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=1vSo0UIuX%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



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.

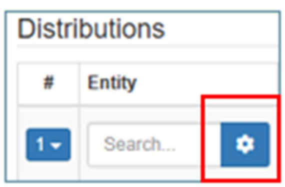
   

4. When you approve an invoice, it will automatically bring up the next one without having to go back to your approval worklist.

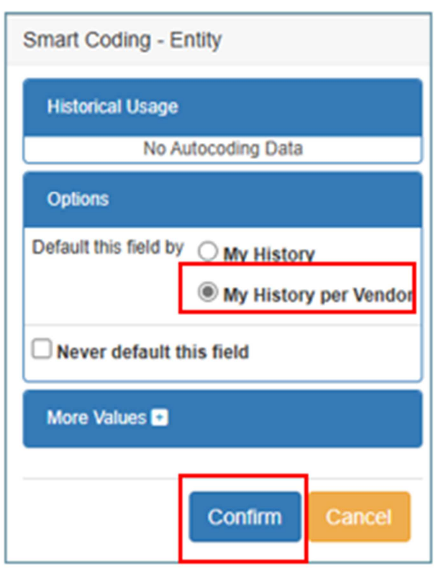
Turn on Auto-Coding

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.

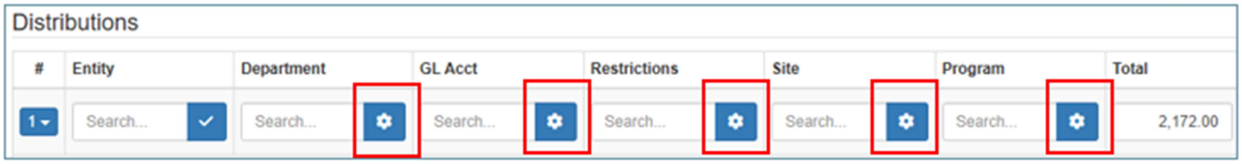
1. In any invoice, under Distributions, go to the Entity section and click on the Gear:

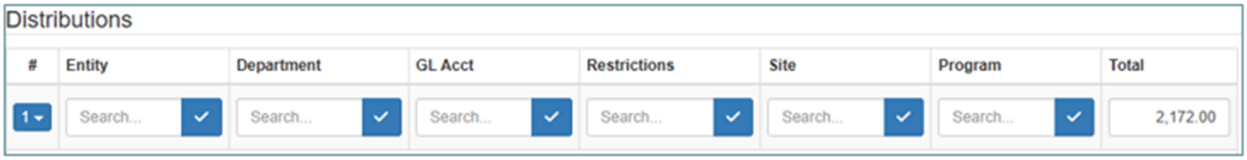
2. Click "My History per Vendor" then click Confirm

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

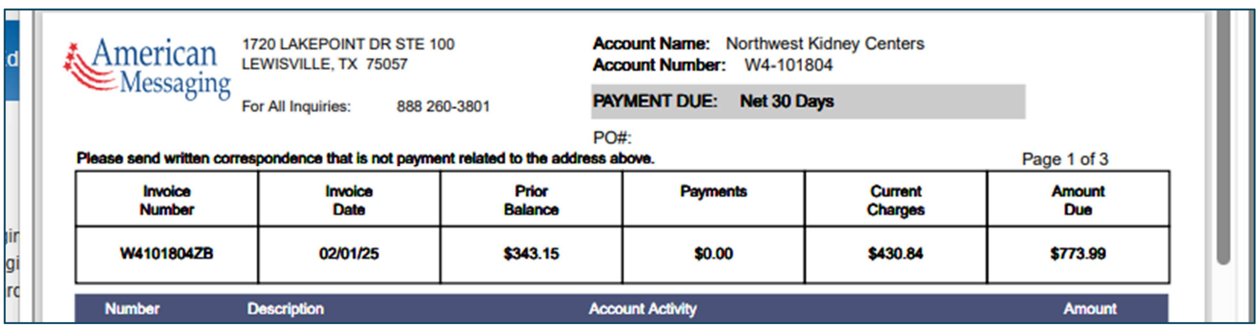


4. You'll know everything is set up as there will now be check marks rather than gears.



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.



American Messaging

1720 LAKEPOINT DR STE 100
LEWISVILLE, TX 75057

For All Inquiries: 888 260-3801

Account Name: Northwest Kidney Centers
Account Number: W4-101804

PAYMENT DUE: Net 30 Days

PO#:

Please send written correspondence that is not payment related to the address above.

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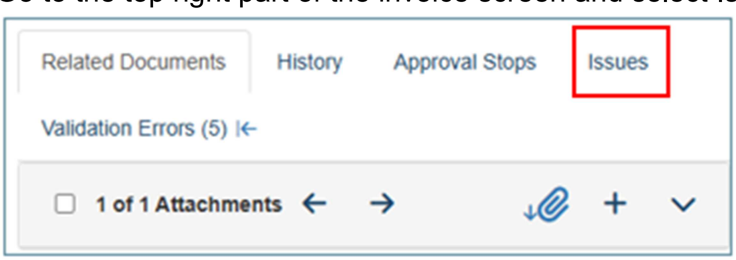
Invoice Number	Invoice Date	Prior Balance	Payments	Current Charges	Amount Due
W4101804ZB	02/01/25	$343.15	$0.00	$430.84	$773.99

Number	Description	Account Activity	Amount

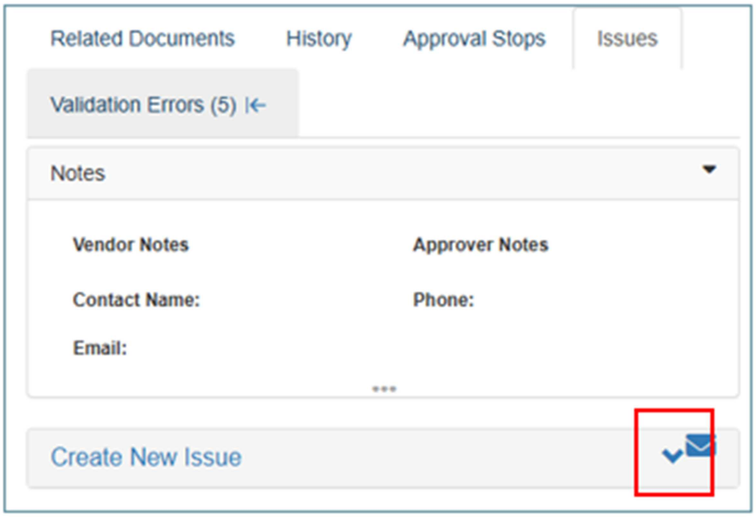
How to Dispute an Invoice

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

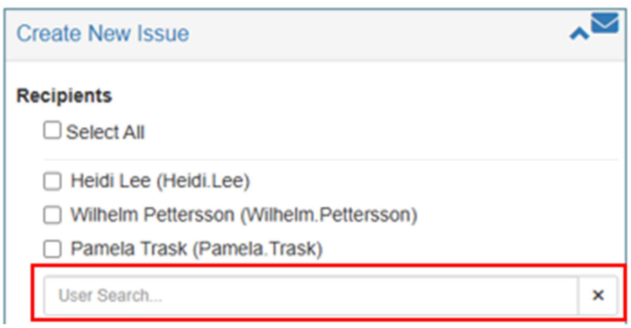
1. Go to the top right part of the invoice screen and select Issues.



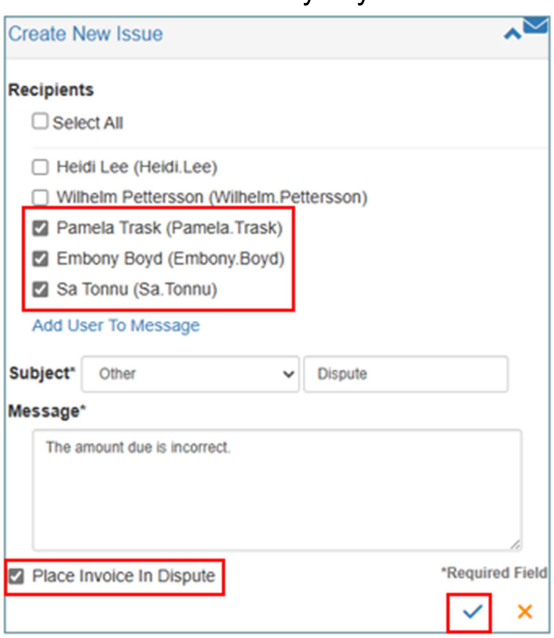
2. Click on the down arrow next to Create New Issue



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.



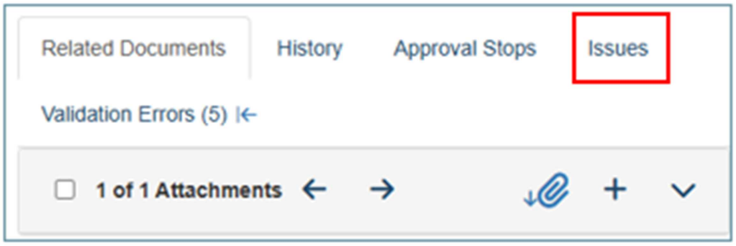
4. Check their names, enter a Subject and Message. Check the box for Place Invoice in Dispute and click the Green Checkmark to submit.
5. Note the invoice will stay in your worklist until you are ready to approve



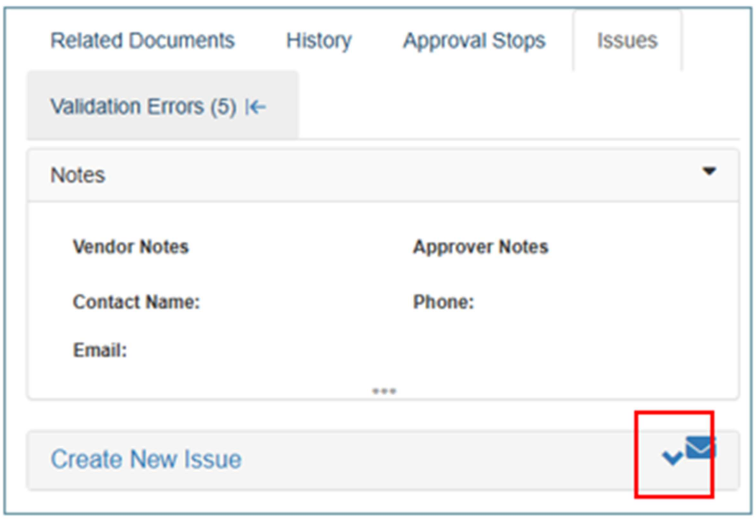
Resolve Issues Such as Routing Errors

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



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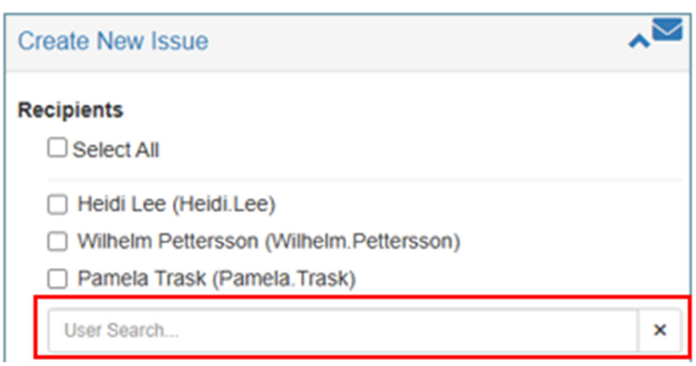
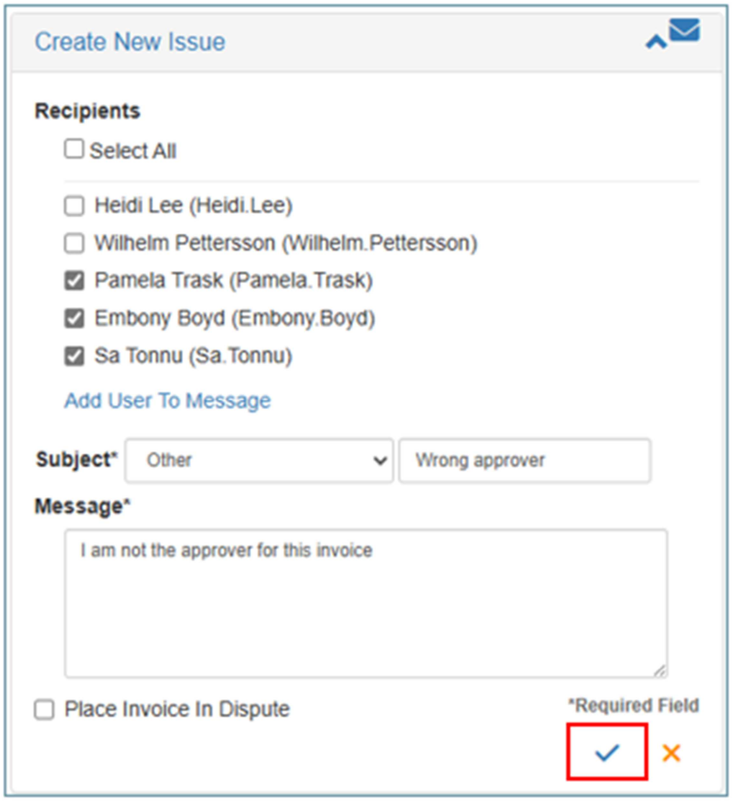


4. Check their names, enter a Subject and Message. Do NOT select to place invoice in dispute. Click the Green Checkmark to submit.



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

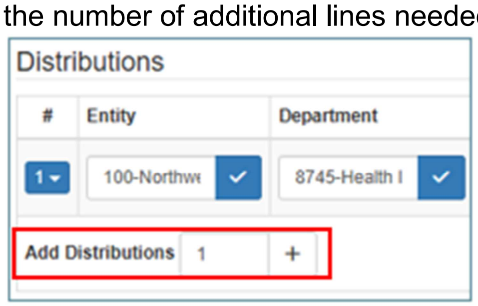
How to Fill out the Description

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.

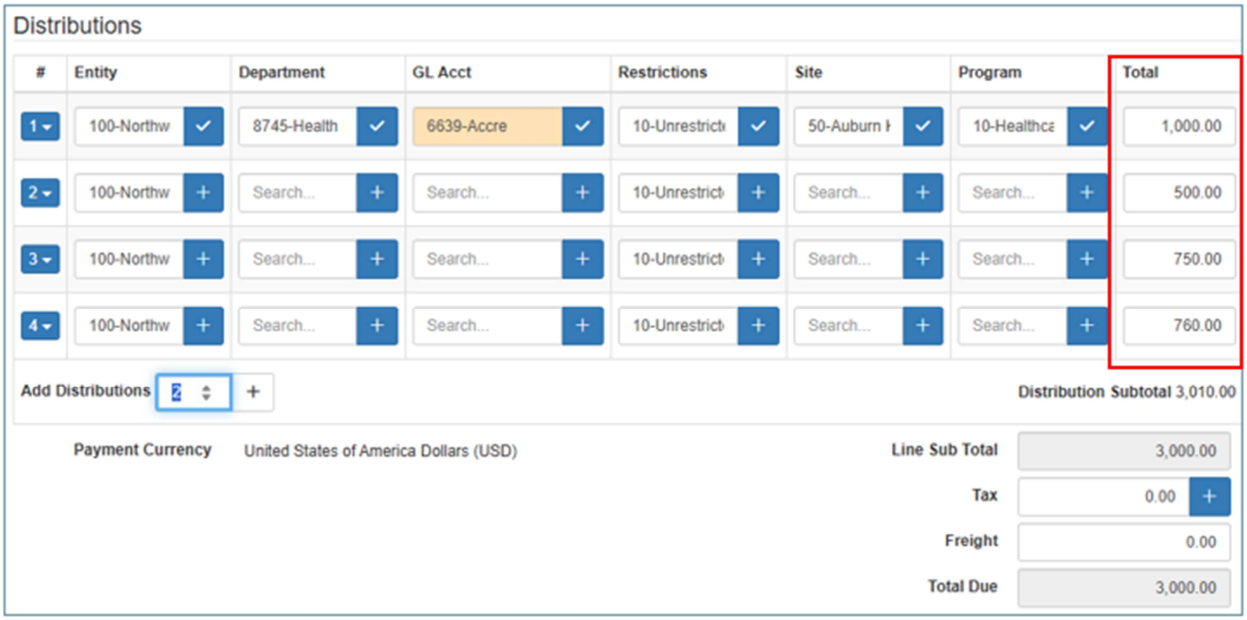
How to Add More than One set of Coding

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

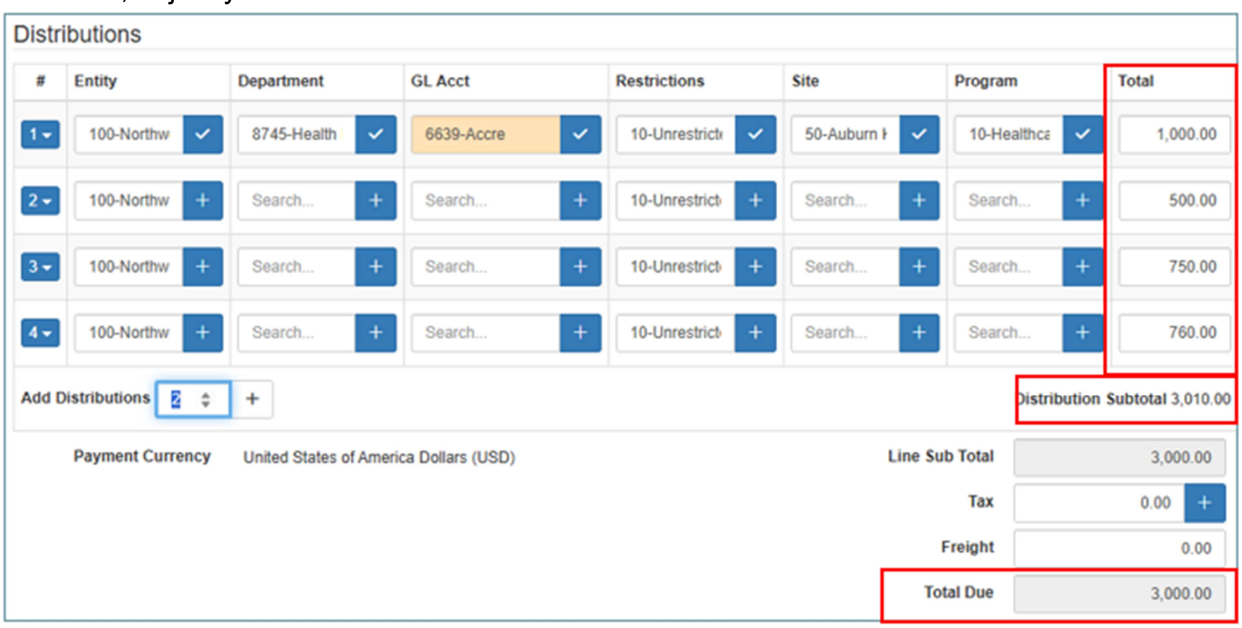
1. Under the coding, click on Add Distribution. You can accept the default of 1, or type in the number of additional lines needed.



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



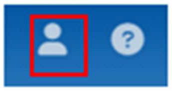
3. Below the Total column there is a field called Distribution Subtotal that shows what all the distributions you've entered add up to. If the Distribution Subtotal does not equal the Total Due, adjust your entries in the Total column until it does.



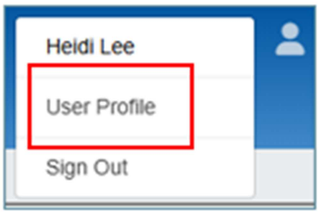
What to do When I Will Be on Vacation

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

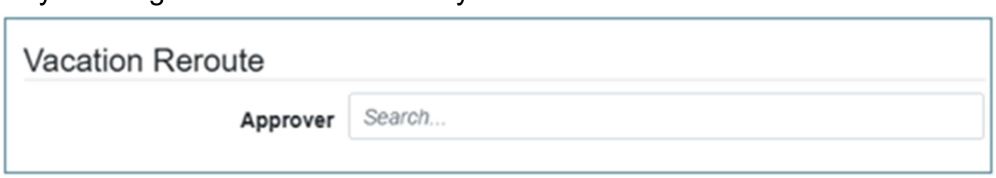


2. Select User Profile

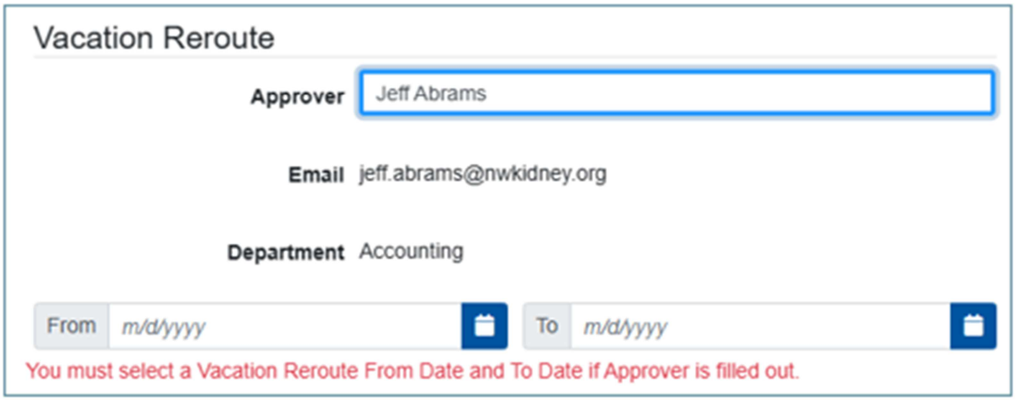


3. Click on the Workflow icon on the left

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.



5. Fill out From and To dates



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.

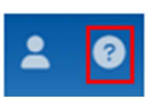
What to do When I Receive an Invoice Directly from a Vendor

1. If you receive a non-PO invoice directly from a vendor, make sure it is in a pdf format then forward it to ap@nwkidney.org 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

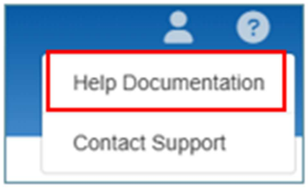
If you need help in iPayables, you have two options:

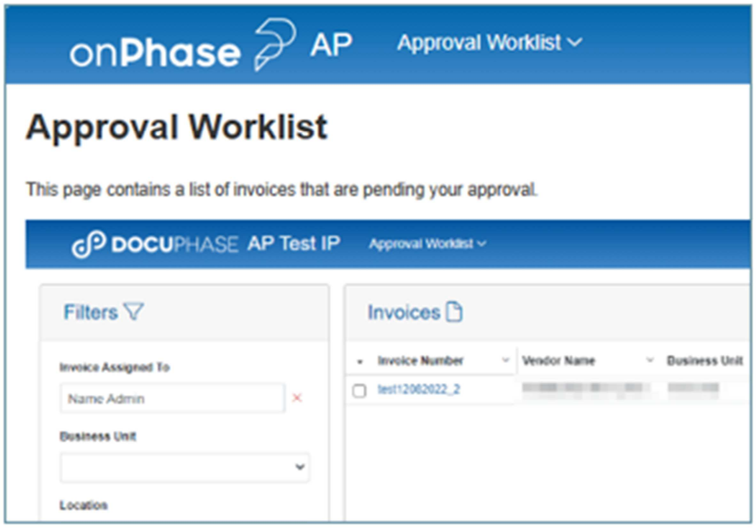
1. Click on the ? in the top right corner



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.





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.