Invoice Payment Processing System (IPPS) for Veterans Benefits Administration (VBA)

Veteran Readiness and Employment Service (VR&E)

User Guide



March 2022 U.S. Department of Veterans Affairs Financial Services Center (FSC)

Table of Contents

| 1. | Relea | se Notes for 03/2022 | 5 |
|----|-----------|---|------|
| 2. | Introd | uction | 6 |
| | 2.1. Pur | pose | 6 |
| | 2.2. Ass | sumptions | 6 |
| | 2.3. Ser | vice and Support Contact | 6 |
| 3. | Syste | m Summary | 7 |
| | 3.1. Sys | tem Configuration | 7 |
| | 3.2. VR8 | &E Authorization High Level Flow | 7 |
| | 3.3. Use | r Functionality Roles | 8 |
| | 3.3.1. | VR&E Read Only | . 10 |
| | 3.3.2. | VR&E Case Manager | . 10 |
| | 3.3.3. | VR&E Supervisor | . 10 |
| | 3.3.4. | VR&E Site Administrator | . 10 |
| | 3.3.5. | VR&E Regional Office (RO) Director | . 10 |
| | 3.3.6. | VR&E Director | . 11 |
| | 3.3.7. | 508 Roles | . 11 |
| | 3.3.8. | VR&E National Read Only | . 11 |
| | 3.3.9. | VR&E National Site Admin | . 11 |
| | 3.4. Rol | es that Can Certify Invoices | . 11 |
| | 3.5. IPP | S Application Initial Screen for Case Manager | . 12 |
| 4. | Gettin | g Started | .14 |
| | 4.1. Log | iging In | . 14 |
| | 4.2. Exit | ting the System | . 14 |
| 5. | My W | ork and Processing your WorkList | .15 |
| 6. | Invoid | e Inquiry System (IIS) | .16 |
| | | bice Search with IIS | |
| | 6.1.1. | Viewing an Invoice | |
| 7. | Autho | prization Form | |
| | 7.1.1. | Search for Vendor | . 23 |
| | 7.1.2. | Search for Participant | . 26 |
| | 7.1.3. | Review Authorization Facility/Vendor | |
| | 7.1.3. | 1. Using the Calendar Tool | 27 |
| | 7.1.4. | Line Item Details | |
| | 7.1.5. | Authorization Fields | . 29 |

| 7.2. My Authorizations | |
|---|----------------|
| 7.2.1. Station Authorizations | |
| 7.2.2. Copying an Authorization to Create a New A | uthorization32 |
| 7.2.3. Filtering Authorizations | |
| 7.2.4. Clearing an Authorization Report Filter | |
| 7.2.5. Cancelling an Authorization | |
| 7.2.6. Viewing a PDF of an Authorization | |
| 7.2.7. Refreshing the Screen | |
| 7.3. Certifying Invoices | |
| 7.3.1. Low Dollar Invoices | |
| 7.3.1.1. Opening a Low Dollar Invoice | |
| 7.3.1.2. Certification Screen | |
| 7.3.1.3.Accepting an Invoice7.3.1.4.Refusing an Invoice | |
| 7.3.2. High Dollar Invoices | |
| 7.3.2.1. Opening High Dollar Invoices | |
| 7.3.2.2. IPPS Role and High Dollar Invoice Certification | |
| 7.3.2.3. Processing a High Dollar Invoice | |
| 7.3.2.4.Refusing the Invoice7.3.2.5.Return to Reviewer | |
| | |
| 7.3.3. Notes and Attachments 7.3.3.1. Adding Attachments to an Invoice | |
| 7.4. Viewing Audit Information | |
| 7.5. Viewing Case Narrative | |
| 7.6. Credit Memo | |
| 7.6.1. Accept or Refuse the Credit Memo | |
| 7.7. Site Administration | |
| 7.7.1. My Work | |
| 7.7.2. User Administration | |
| 7.7.2.1. Add a New User | |
| 7.7.2.2. Assign or Change a Role | |
| 7.7.2.3. Add an Authorization | |
| 7.7.2.4. Remove a User | |
| 7.7.2.5. Reactivate a User | |
| 7.7.2.6. Delete User-Assigned Authorizations7.7.2.7. Re-assign an Authorization Number | |
| 7.8. Dashboard | |
| 7.8.1.1. Chart Actions | |
| 7.9. Monitor Activity | |
| 7.9.1. Viewing a Report | |
| 8. Exporting to Excel | |
| 9. Troubleshooting | |
| ······································ | |

| ę | 9.1. Use | er or Access Issues | . 87 |
|-----|----------|-----------------------------------|------|
| | 9.1.1. | Error When Logging In | . 87 |
| | 9.1.2. | Log-in Error Persists | . 87 |
| 10. | Acror | ıyms | .88 |
| 11. | Appe | ndix A. List of Status Conditions | .89 |

1. Release Notes for 03/2022

- Credit Memo User Interface (UI) updates
- Handling Charges and Mandatory Taxes Added
- The Invoice Line Details user UI was updated to add the ability to <u>view handling charges</u> and <u>mandatory taxes</u>.
- Add Pagination Abilities to the Station Authorization Report
- When searching through a large Station Authorization Report/List, select the pagination feature for navigation. It is located in the top right section of the <u>Station Authorization</u> <u>List screen</u>. This feature is not available for My Authorizations.
- Use Microsoft Edge or Google Chrome for validated browser access. Internet Explorer (IE) 11 is no longer supported.
- Vendor search results list Unblocked and Blocked Vendors
- When using the Vendor Search capability, <u>search results</u> now include both unlocked and blocked vendors.
- Invoice Status Search Results includes the Check Date field.
- WorkList screen button changed from Export/Print button to Export button.

Known bugs:

- View PDF hyperlinks did not work in UTest. They will work in future deployment.
- A few screen shots need to be updated to new UI. The screen shots were not available in UTest. The skins of the UI are different, so the screen shots have the same layout. This will be captured in future deployment.
- Figure numbering had to be corrected on 3/11/22 which impacts alt text for 508 compliance. So I will update the alt text and complete it by the end of next week (3-18-22)

2. Introduction

2.1. Purpose

This User Guide aids in the use of the Invoice Payment Processing System (IPPS) for the Veteran Readiness and Employment (VR&E) Service in the Veterans Benefits Administration (VBA).

2.2. Assumptions

This guide was written with the following prerequisites:

- Validated access to the system using Microsoft Edge or Google Chrome
- Completion of any prerequisite training

2.3. Service and Support Contact

- For technical assistance with the IPPS product, contact <u>VAFSCEnterpriseSupport@va.gov</u>
- Phone: 866-372-1141, Monday through Friday 8:00 p.m. to 5:00 p.m. Central Time (CT) [UTC-06:00]

NOTE: UTC stands for Coordinated Universal Time. Also known as Greenwich Mean Time or GMT. UTC-06:00 is six hours ahead of UTC-00:00 (London, England).

• For VR&E policy questions, contact <u>VR&E_IPPS.VBACO@va.gov</u>

3. System Summary

In IPPS, an authorization is created and sent to the Tungsten-Network (Tungsten). The Service Provider logs into Tungsten to review the authorization and converts it into an invoice. The invoice is sent back to IPPS for certification and payment.

3.1. System Configuration

IPPS is a web-based system that recognizes your credentials if you're logged into your government computer with your Personal Identity Verification (PIV) card. A username or password is not needed.

3.2. VR&E Authorization High Level Flow

The VR&E Authorization High Level Process Flow consists of the following steps:

- 1. VRE Case Manager (CM) creates Authorization in IPPS system.
 - a. The IPPS system auto-generates an email. Go to step 2a.
 - b. IPPS System via EDI. Go to step 2.
- 2a. Email sent to vendor.
- 2. Authorization Data Transfer to Tungsten.
- 3. VBA Vendor logs into Tungsten, reviews authorization/provides service to Veteran.
- 4. Vendor creates and sends invoice/attachments. IPPS system auto imports via EDI. Go to step 5.
- 5. Import Invoice into IPPS.
- 6. VRE Case Manager Reviews Invoice.
- 7. VRE Case Manager Certification Action accept/refuse invoice?
 - a. If recommend, accept high dollar invoice, then go to step 7a.
 - b. If accept low dollar invoice then go to step 8.
- 7a. VRE Supervisor/RO Director Certification Action accept/refuse invoice? If accept high dollar invoice. Go to step 8.
- 8. Invoice submitted to FMS for payment (IPPS System).
- 9. Payment request/received by FMS.
- 10. FMS accept/reject.
 - a. If accept, go to step 11.
 - b. If reject, go to step 11a.
- 11. Payment sent to vendor.

11a. Invoice routed to FMS rejections WB (FSC Payment Resolution Team).

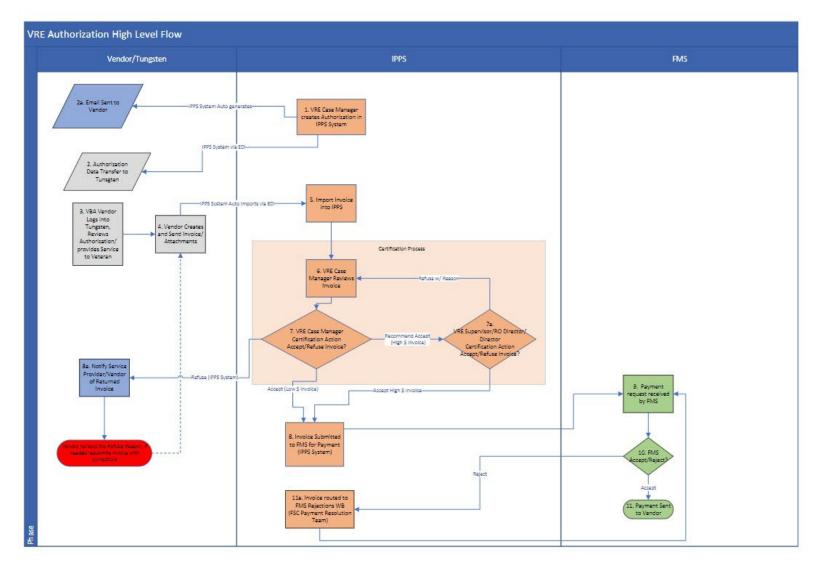


Figure 1: VR&E High Level Flow

3.3. User Functionality Roles

The following table lists each user role and their functionality available for each role.

- The user can only be assigned one role at a time.
- Each role has a corresponding Section 508 role for accessibility users.

| IPPS User Admin Role Labels | Ability to Research All Stations | Ability to Certify Invoices | Ability to Certify High \$ Invoices | Ability to Manage User Administration | Ability to Access/Run Reports (Monitor Activity) | Ability to View Dashboards | Ability to Create Authorizations | My Authorizations Button | Station Authorizations | IIS Reports |
|--------------------------------|---|-----------------------------------|--|---|---|-------------------------------|--|--------------------------------|---------------------------|----------------|
| VRE Read Only | Х | | | | | | | | | |
| VRE Case Manager | Х | Х | | | | | Х | X | Х | |
| VRE Supervisor | Х | Х | Х | | Х | | Х | X | Х | |
| VRE Site Admin | Х | | | X | X | X | | | | |
| VRE RO Director | Х | | Х | | Х | Х | | | | |
| VRE Director | Х | | Х | | Х | X | | | | |
| VRE Read Only - 508 | Х | | | | | | | | | |
| VRE Case Manager - 508 | х | х | | | | | x | x | | |
| VRE Supervisor - 508 | Х | Х | Х | | Х | | Х | X | | |
| VRE Site Admin - 508 | Х | | | Х | Х | Х | | | | |
| VRE RO Director - 508 | х | | x | | х | х | | | | |
| VRE Director - 508 | Х | | Х | | Х | Х | | | | |
| VRE National Read Only | х | | | | х | х | | x | x | x |
| VRE National Site Admin | х | | | Х | х | х | | x | x | x |

Table 1. User Functionality Roles

3.3.1. VR&E Read Only

VR&E Read Only access includes the ability to research all stations.

3.3.2. VR&E Case Manager

The VR&E Case Manager functions include the following:

- Research all stations.
- Create an authorization for a Service Provider on behalf of a Participant.
- View or cancel their own authorizations.
- Certify and approve low dollar invoices.
- Recommend approval for high dollar invoices, these invoices are automatically routed to the Supervisor for recommendation or final approval.

3.3.3. VR&E Supervisor

Supervisor functions include the following:

- Research all stations.
- Create an authorization for a Service Provider on behalf of a Participant
- View or cancel authorizations.
- Certify and approve low dollar invoices.
- Recommend approval for high dollar invoices within their threshold, these invoices must be routed to another Supervisor or RO Director for recommendation or final approval if they served as the initial case manager.
- Monitor Activity.

3.3.4. VR&E Site Administrator

Site Administrator functions include the following:

- Managing users and reassigning invoices for review to other Case Managers, if necessary
- User Administration
- Dashboard
- Monitor Activity

3.3.5. VR&E Regional Office (RO) Director

The RO Director functions include the following:

- Research all stations.
- Certify high dollar invoices
- Dashboard

• Monitor Activity

3.3.6. VR&E Director

The Director functions include the following:

- View all authorizations from all stations that require certification
- Research
- Certify high dollar invoices
- Dashboard
- Monitor Activity

3.3.7. 508 Roles

There are 508 roles for VR&E Read Only, VR&E Case Manager, VR&E Supervisor, VR&E Site Admin, VR&E RO Director, and VR&E Director.

3.3.8. VR&E National Read Only

VR&E National User Role Service will be better able to support the field with IPPS inquiries through the creation of National User roles.

• National User roles will allow Read Only access to IPPS for the Field Services, Quality Assurance, Strategic Analysis, the Support Services Division, and National Program Implementation teams.

3.3.9. VR&E National Site Admin

VR&E National Site Admins provide support to station admins.

3.4. Roles that Can Certify Invoices

The amount of the subtotal per Budget Object Code (BOC) determines the approval path for tuition, books, and supplies. It also determines which selections are seen by the approver (either approve/refuse or recommend approve/refuse).

Each invoice works its way through the layers of approval in the system. When a user submits an invoice for approval, the system considers two factors:

- Has the threshold for the BOC subtotal been met or exceeded?
- Which role is next in the line for approval?

Roles that can certify invoices include the following:

- Case Manager low dollar invoices
- Supervisor low dollar invoices, high dollar invoices
- RO Director and Director high dollar invoices The invoice are routed one of the following ways:
 - If approval is recommended, it goes to the next higher role in the process for approval.

- If approval is given, the invoice is paid.
- If refusal is given, the invoice is archived, and a notification is sent to the vendor/service provider.

The following are thresholds for the two types (Low Dollar and High Dollar) of invoices to give you an idea of the approvals required:

NOTE: Low Dollar invoices only require a single approval from the Case Manager or Supervisor.

| IPPS Role | Thresholds for Books | Thresholds for Supplies | Thresholds for Tuition Payments | | |
|--------------|----------------------|----------------------------|------------------------------------|--|--|
| Case Manager | <=\$5,000 | <=\$5,000 | <=\$25,000 | | |
| Supervisor | <=\$5,000 | | <=\$25,000 | | |

Table 2. IPPS Low Dollar Thresholds

| IPPS Role | Thresholds for Books | Thresholds for Supplies | Thresholds for Tuition Payments |
|-------------|----------------------|----------------------------|---------------------------------|
| Supervisor | >\$5,000 but <= | >\$5,000 but <= | \$25,000 but |
| | \$10,000 | \$10,000 | <=\$50,000 |
| RO Director | >\$10,000 but <= | >\$10,000 but <= | >\$50,000 but <= |
| | \$15,000 | \$15,000 | \$100,000 |
| Director | >\$15,000 | >\$15,000 | >\$100,000 |

Table 3. IPPS High Dollar Thresholds

For example:

- If an invoice comes in for books that exceeds \$15,000, the Supervisor can recommend approval, then the RO Director can recommend approval, but the Director has the final approval.
- If an invoice comes in for books for \$6,000, the Supervisor provides the final approval, and it does not go to the next level.

3.5. IPPS Application Initial Screen for Case Manager

When the Case Manager (CM) logs into IPPS, the IPPS Application Station CM role Initial screen displays. The following options are available:

- 1. **Process Work:** Process Work for the CM role includes the following, Invoice Inquiry System, Authorization Form, and My Authorizations
- 2. **Invoice Inquiry System:** Used to run searches for payment history, work in process, or invoices that are resolved or archived.

- 3. Authorization Form: The Authorization Form is created in IPPS so that Service Providers can invoice for services rendered and School Certifying Officials (SCOs) can be notified that training hours should be certified in VA-ONCE.
- 4. **My Authorizations**: A list of authorizations that have been created by you after they have been submitted.
- 5. **Station Authorizations**: Supervisors, Site Admins and Read Only users will have the ability to view a list with all authorizations created at the station. CMs will not have access to this feature.
- 6. National Contract Invoices: For VR&E National Contract (NC) users.
- 7. **iFAMS Station Inquiry System**: For VR&E NC users only.
- 8. **My Work**: Invoices that belong to the CM are located in the My Work.
- 9. Select a Station: Select the organization station the CM works with. If the CM has work with more than on station, then the drop down list will include the appropriate stations.
- 10. Worklist: A list of Invoices assigned to the CM.
- 11. Export: Export the CM Worklist.
- 12. Drop Down Menu: Navigate between screens.
- 13. Help Icon: Provides a link to SharePoint site for help resources for IPPS
- 14. Log Off: Select the Log Off menu item when you are ready to exit the application.

| U.S. Department of Veterans Affairs | Invoice Payment Processing System (FMS) [®] | O Log off 13 14 |
|---|--|--------------------|
| | My Work 8 | 12 🔻 |
| V Process Work 1 | Select a Station 438 V 9 | |
| Invoice Inquiry System 2 Authorization Form 3 | Document Locator Number * Auth Number * VendorName * VendorID * Amount * Participant Name * Certification Status * Age * Received Date * VA File N x000000000x x00000000x Sam Smith x00000000x 11/2/2020 xxxxxxx | lumber 💌 |
| My Authorizations 4 Station Authorizations 5 National Contract Invoices 6 | | |
| iFAMS Station Inquiry System 7 | | |

Figure 2: IPPS Initial Screen for Case Manager Role

4. Getting Started

4.1. Logging In

To log into IPPS:

- 1. Log into your government computer using your PIV card.
- 2. Go to https://vaww.ipps.fsc.va.gov/prweb/PRWebLDAP1/
 - A System Warning screen with an Authorized Use Only dialog box displays.
- 3. To agree, mark the **Checkbox** at the bottom of the dialog box and select the **Agree** button.

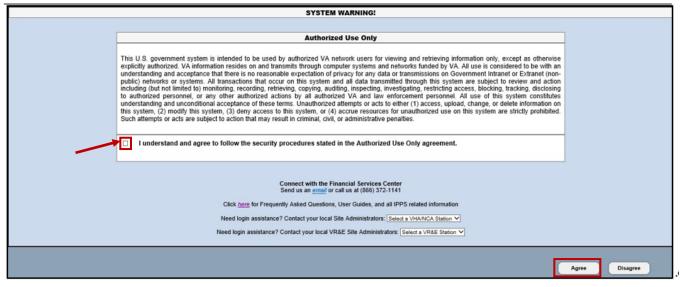


Figure 3: Authorization Use Screen

NOTE: Access is granted with a provisional 90-day activity window. If you do not log into IPPS within a 90-day period, your access to the application is removed and you will not be able to log in. To regain access, see, <u>Section 9 Troubleshooting.</u>

After a few seconds, the IPPS application displays. The interface may appear to have a different look based on your role in the system.

4.2. Exiting the System

To log off the system complete the following:

1. Select Log Off at the top right-hand side of the screen (see call out 11 on Figure 2: IPPS Initial Screen). When you log off, IPPS closes the application tab. If the application tab is the only one open, your browser window closes.

5. My Work and Processing your WorkList

In the **My Work** tab, the WorkList consists of the invoices ready for an action by the user. To access your WorkList screen, complete the following steps:

- 1. From the My Work tab, select the assigned **Station** for your user role from the drop down menu. The appropriate WorkList screen displays.
- 2. Select the drop **down arrow** next to each column heading to filter your worklist based on the filter selected. The WorkList displays with Filtered by information included.
- 3. To export your WorkList, select the **Export** button.

| My Work | | | | | | | | | | V |
|----------------------------|------------------------|------------------------------|------------------------|-----------|----------------------------------|--|------|-------------------------|---------------------------------------|----------------|
| Select a Station | 101 🗸 | | | | | | | | | |
| WorkList | | | | | | | | | | |
| | | | | | | | _ | | | |
| | | | | | | | | | | Export |
| Document Locator N | Number Auth Number | ▼ VendorName 🔹 | VendorID - | Amount | Participant Name | Certification Status | Age | Received Date | Original CM Name | VA File Number |
| 32406300002 | 101140007 | YVETTE L PULLEN | 000586672 | 199.00 | TESTERA TESTER | | | 11/2/2020 | vafscsyedistest6@va.gov | |
| 32406300003 | 101140006 | OSMAN NOURELHUDA | 001020920 | 199.00 | TESTERA TESTER | | | 11/2/2020 | vafscsyedistest6@va.gov | |
| 32406300004 | 101140008 | YVETTE L PULLEN | 000586672 | 199.00 | TESTERA TESTER | | 468 | 11/2/2020 | vafscsyedistest6@va.gov | |
| 04306300003 | 101040045 | FEDERICO COLLEGE INC | 473541625 | | DTESTERA TESTER | | | 12/2/2019 | vafscsyedistest6@va.gov | |
| 23196300001 | 101940176 | THE UNIVERSITY OF TEXAS | | | | | | 7/30/2019 | binod.kumartest2@va.gov | |
| 23196300002 | 101940176 | THE UNIVERSITY OF TEXAS | | | | | | 7/30/2019 | binod.kumartest2@va.gov | |
| 21196300002 | 101940144 | THE UNIVERSITY OF TEXAS | | | | | | 7/10/2019 | binod.kumar@va.gov | 323-32-3232 |
| 20906300001 | 101040067 | DELLSEMER | | | KRYSTAL KAREY | Pending-Unassigned | | 7/6/2019 | binod.kumar@va.gov | 223-19-1041 |
| 18296300001 | 101940036 | THE UNIVERSITY OF TEXAS | | | TESTERA TESTER | | | 6/20/2019 | Joy.Owen@va.gov | |
| 18296300002 | 101940036 | THE UNIVERSITY OF TEXAS | | | TESTERA TESTER | | | 6/20/2019 | Joy.Owen@va.gov | |
| 18296300005 | 101940036 | THE UNIVERSITY OF TEXAS | | | TESTERA TESTER TESTERA TESTER | | | 6/20/2019 | Joy.Owen@va.gov | |
| 18296300006 | 101940036 | THE UNIVERSITY OF TEXAS | | | DTESTERA TESTER | | | 6/20/2019 | Joy.Owen@va.gov | |
| 25996300001 14983400039 | 101940037 101940065 | OST, INC SDV CONSTRUCTION | 522175314 203225361 | | DIESTERATESTER | Pending-Unassigned Pending-Unassigned | 1151 | 12/20/2018 3/16/2017 | Joy.Owen@va.gov Binod.Kumar@va.gov | 101-10-0002 |
| 14903400039 | 101940065 | 30V CONSTRUCTION | 200220001 | 200,000.0 | UJOHN HALL | renuing-offassigned | 1795 | 3/10/2017 | Binou.rumar@va.gov | 101-10-0002 |

Figure 4: WorkList Screen

- 4. Select the Actions button. The Actions drop down menu displays.
- 5. Select one of the **Actions** from the available options.

NOTE: The Action button's drop down menu options can vary based on your role and the User Interface (UI).



6. Invoice Inquiry System (IIS)

The **Invoice Inquiry System** (IIS) component is used to run searches for payment history, work in process, or invoices that are resolved or archived. To navigate to IIS, complete the following:

1. Select **Invoice Inquiry System** from the Process Work section of the left navigation bar. The IIS tab displays.

The following invoice search options are available from IIS.

- Authorization #
- Vendor ID
- Invoice DLN (unique number in IPPS)
- Check #
- VA File #
- Invoices Paid After 30 Days

NOTE: Invoices paid to vendors by your station will be displayed

6.1. Invoice Search with IIS

- 1. First, select one of the following invoice search options:
 - a. Authorization #
 - b. Vendor ID
 - c. Invoice DLN (unique number in IPPS)
 - d. Check #
 - e. VA File #
 - f. Invoices Paid After 30 Days
- 2. Enter the following additional query parameters to narrow the search:
 - a. Enter the Value for the selected type. (Note: This is a required field.)

NOTE: Additional fields may display depending on the option type you select.

- b. Enter the **Beginning Date** for the check number. This is an **optional** entry.
- c. Enter End **Date** for the check number. This is an **optional** entry.
- d. Select the Search button. The Invoice Status search results display.

| | | Invoice | <u>Inquiry System</u> | |
|-------------------------------------|---------------|--------------|-----------------------|-------------------------------|
| Authorization # | O Invoice DLN | ○ Referral # | ○ VA File # | O Invoices Paid After 30 Days |
| Enter a Value * | | | | |
| | | Sear | rch Clear | |

Figure 5: Invoice Inquiry System Screen

| Invoice Details | | | | | | | | | | | | | | | |
|--------------------|---|-------------|-----------|--------------------|-------|--------------|------------|---------|---------------|---------------------|-----------------|----------------|--------------------|--------------------|------------------------|
| | | | | | | | | | | | | | | | Export to Excel |
| Authorization # SP | | DLN | Vendor ID | Vendor Name | Ref # | Invoice #▲ | Amount | Check # | Check Date | Participant Name | VA File # | Participant ID | Case Manager | Work Status | Late Payment reason |
| 101940058 | 3 | 34816300001 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO10 | (\$100.00) | | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 101940058 | (| 02426300001 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO10 | (\$300.00) | | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 101940058 | (| 02426300002 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO10 | (\$300.00) | | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 101940058 | | 34816300002 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO11 | (\$200.00) | | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 101940058 | | 34816300004 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO13 | (\$450.00) | | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 101940058 | 3 | 34816300005 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO14 | (\$550.00) | | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |

Figure 6: Invoice Status Search Results

The following table describes the columns found on the Invoice Status search results screen.

| Column Title | Entry/Description |
|------------------|---|
| Authorization # | Authorization ID number |
| SP | This is a two-digit alphanumeric number that is unique for each payment. It translates to the reference number. For example, if the reference number is IT 595C9000010, then SP = 10. |
| DLN | Document Locator Number, the unique identifier for the invoice in IPPS |
| Vendor ID | Assigned number for the vendor |
| Vendor Name | Name of the vendor assigned to the authorization. |
| Ref # | This is an alphanumeric accounting reference number that tells which invoice the payment came from and which section it came from. |
| Invoice Number | Invoice Number associated with the Authorization |
| Amount | Amount of the invoice |
| Check # | If an invoice has been paid, a seven-digit Check Number is displayed. A check date should also display in the Check Date field. A check number beginning with a "Z" means the payment was fully offset by an FSC Bill of Collection. The invoice should be considered paid in full. |
| Check Date | Date the check was issued by Treasury. |
| Participant Name | Name of the participant associated with the Purchase Order (PO) |

| Column Title | Entry/Description | | | | | |
|---------------------|---|--|--|--|--|--|
| Participant ID | Unique ID assigned to the participant | | | | | |
| VA File | Unique File Number assigned to participant. | | | | | |
| Case Manager | The Case Manager associated with the PO | | | | | |
| Work Status | This column displays the status of processing | | | | | |
| Late Payment Reason | Explanation by the case manager of why the invoice was paid late. | | | | | |

 Table 4: Column Details of the Invoice Status search results screen

6.1.1. Viewing an Invoice

To view an invoice you want to view complete the following:

1. To select the invoice **double press** your mouse or track pad. The image of the invoice and the invoice certification details displays

| uthorization # SP | DLN | Vendor ID | Vendor Name | Ref # | Invoice # | Amount | Check Date | Participant Name | VA File # | Participant ID | Case Manager | Work Status | Late Payment reason |
|-------------------|-------------|-----------|---------------------------------------|-------|---------------|--------------|---------------|---------------------|-----------------|----------------|--------------------|------------------------------------|------------------------|
| 01940058 | 19883400020 | 205980270 | EVOKE RESEARCH AND CONSULTING, LLC | | TESTVRE530019 | \$121,000.00 | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending- PaymentConfirmationFMS | Delinquent Approval |
| 01940058 | 33316300004 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO2 | (\$300.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | | |
| 01940058 | 34816300001 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO10 | (\$100.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 01940058 | 34816300002 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO11 | (\$200.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 01940058 | 34816300004 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO13 | (\$450.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 01940058 | 34816300005 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO14 | (\$550.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 01940058 | 34816300006 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO15 | (\$650.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 01940058 | 35116300005 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO9 | \$400.00 | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending- PaymentConfirmationFMS | Routing Issue |
| 01940058 | 02426300001 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO10 | (\$300.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| 01940058 | 02426300002 | 262711417 | ATLAS RESEARCH LLC | | CREDITMEMO10 | (\$300.00) | | JOHN HALL | 101-10- 0001 | 826999 | Binod.Kumar@va.gov | Pending-Unassigned | |
| orizations | | | | | | | | | | | | | |

Figure 7: Invoice Status Search Results

| VA Test Account UAT | | Invoice | | |
|--|------|--|--|-----------------|
| Bill From | E | ill To | Invoice No. | NCAslin503 |
| | - | | | |
| VA Test Account UAT | | Department of Veterans Affairs - Test Buyer Account | PO Number | 36828720C00040 |
| 2680 S Val Vista Dr #152 | | Test Drive | Vendor Code | 201195460 |
| TESTMY | - | ustin | Invoice Date | 05/18/2020 |
| TESTRG | | X | Currency | US Dollar |
| Gilbert | | 2308 | Amount to pay | 30,000.00 |
| AZ | | 2000 | Amount to pay | 50,000.00 |
| 85295 | | | | |
| United States | - | contact iel | Sent by Tungsten | 05/18/2020 |
| | | en Email | Network on | |
| Contact Tel | E | mail | Tungsten Network Transaction Number | BAA000016677289 |
| Email | s | hip To | Supplier Tungsten Number | AAA669397606 |
| Ship From | | epartment of Veterans Affairs - Test Buyer Account Test Drive | Buyer Tungsten Number | AAA408798528 |
| | | PO BOX 0 | Status | Sent |
| VA Test Account UAT | - | ustin | 510105 | 50m |
| 2680 S Val Vista Dr #152 | | X | | |
| Gilbert | | 2308 | Delivery Note | |
| AZ | Ŭ | 2000 | Payment Due By | 05/18/2020 |
| 85295 United States | | | | |
| | | | | |
| Remit To Address | | | | |
| VA Test Supplier - RemitToCompanyName | | | | |
| John Doe- RemitToContactName | | | | |
| 1234 East Peidmont Rd- RemitToAddress1 | | | | |
| PO BOX 7357: Additional address line. | | | | |
| Austin | | | | |
| тх | | | | |
| 30067 | | | | |
| UNITED STATES | | | | |
| CLIN / Description Quantity | Unit | Unit Price Total | Discount % Discou | unt Amou |
| | | | | |
| ine | | | | |

Figure 8: Invoice Image

The invoice details displays with associated information. For SIS Certification Details complete the following:

2. If the Show Markup button displays, Select It. Any additional markups previously added on the invoice image will display.

NOTE: Show Markup functionality is presently rarely used.

3. Select the Audit Trail/Attach /Notes & Files button. For additional information on using Audit Narrative/Case Details information (see, <u>7.4 Viewing Audit Info</u>).

| https:/ | //vaww.ipps | osoft Edge | | | łs | 0 |
|--|---------------------------------|--|--|--|----|---|
| 1 | Details DLN Number: | Status: 🏴 Pending-Certification | | | _ | |
| | | | | | | |
| articipant N articipant II (A file Numb authorization | D | Vendor Name Vendor ID Enrollment Start 01/02/2021 Enrollment End 01/01/2022 | Invoice Date Invoice Received Date Invoice Number Payment Amount | 02/10/2022 02/10/2022 \$1,809.00 | _ | |
| | | | | | | |
| ew Authori | zation Image | | | | | |
| ew myorce | maye | | | | | |
| | | | | | | |
| sice Line Detail | la . | | | | | |
| oice Line Detai | la . | | | | | _ |
| | a Description | | вос | | _ | |
| | | | вос | | | |
| ine | | | BOC | | | |
| ine | Description | | BOC | | | |
| ine | Description | | BOC | | | |
| ine | Description | | BOC | | | |
| ine | Description Tuition and Fees | | BOC | | | |
| Line 1 Date of A | Description Tuition and Fees | | BOC | | | |
| Line 1 Date of A | Description Tuition and Fees | , | BOC | | | |
| | Description Tuition and Fees | | BOC | | | |
| Line 1 Date of A | Description Tuition and Fees | | BOC | | | |
| Line 1 Date of A | Description Tuition and Fees | | BOC | | | |

Figure 9: Invoice Details Example 1

For invoice details for an invoice outside the enrollment period complete the following:

- 1. To view the authorization image, select View Authorization Image hyperlink.
- 2. To view invoice image, select View Invoice Image hyperlink.
- 3. Select the Audit Trail/Attach /Notes & Files button. For additional information on using Audit Narrative/Case Details information (see, <u>7.4 Viewing Audit Info</u>).

| Invoice Details | DLN Number: 33316300 | 004 Status: 🏴 Pending-Unas | signed | | |
|--|--|--|---|--|--|
| Invoice is outside t | he Enrollment period | | | | |
| Participant Name Participant ID VA file Number Authorization Numb | JOHN HALL 826999 101-10-0001 er 101940058 | Vendor Name Vendor ID Enrollment Start Enrollment End | A P CERTIFIED TESTING LLC 262746040 06/18/2019 06/29/2019 | Invoice Date Invoice Received Date Invoice Number Payment Amount | 03/09/2017 03/16/2017 CREDITMEMO2 -\$300.00 |
| View Authorization I | mage | | | | |
| View Invoice Image | | | | | |
| | | | | | |
| Invoice Line Details | | | | | |
| Line D | escription | | | BOC | |
| 1 V. | A798S12D0009 VAIC3 | Fixed Price IDIQ Contract V | A11915J0059 Task Order 12 | | |
| 1 V. | A798S12D0009 VAIC3 | Fixed Price IDIQ Contract V | A11915J0059 Task Order 12 | | |
| | | | | | |
| Date of Acceptar Audit Trail / At | nce : ttach Notes & Files | | | | |

Figure 10: Invoice Details Example 2

7. Authorization Form

The Authorization Form is created in IPPS so that Service Providers can invoice for services rendered and School Certifying Officials (SCOs) can be notified that training hours should be certified in VA-ONCE.

To create an authorization, complete the following steps:

1. Select the Authorization Form button from the left navigation bar.

NOTE: You must enter all required information denoted by an asterisk. Your level of access determines the selections available in the navigation bar.



Figure 11: Authorization Form Button

The Veteran Readiness & Employment Authorization screen displays.

It consists of the following sections:

- 1. Search for Vendor
- 2. Search for Participant
- 3. Review Authorization Facility/Vendor Selection
- 4. Line Item Details

| My Work | -33418 | | | | |
|-----------------------------|---|----------------|---|-------------|--|
| | | | | | |
| | | | | | |
| | | | | | |
| Veteran Readines | s & Employment Authorization | | | | |
| Search For Vendor | | | | | |
| Vendor Name : | | Vendor ID : | Enter 9 or 11 digit Vendor ID | Zip : | |
| Address 1 : | | State : | | SCO Email : | |
| | | | | | |
| Vendor Sear | ch Clear | | | | |
| | | | | | |
| Search For Participant | | | | | |
| Social Security Number | Do not Enter Dashes | VA File Number | Enter 8 or 9 Charecter File Number only | | |
| Participant S | earch | | | | |
| | | | | | |
| Review Authorization Facili | ty/Vendor Section | | | | |
| Name of Services | /Assistance (Include Degree Type When Applicable) * | | | 1 | |
| | | | | | |
| | | | | | |
| | | | | | |
| Enrollment Perio | d : | | | | |
| Start Date : * | | End Date : * | | | |
| Start Date . N | | Linu Date . * | ** | | |
| | | | | | |
| Line Item Details | | | | | |
| Tuition and Fee | es: 4107 | | | | |
| Required Book | s: 4108 | | | | |
| Required Supp | lies: 4109 | | | | |
| Handling Chan | ges * Applicable only to books & supplies: 4112 | | | | |
| | | | | | |
| Required Tutor | | | | | |
| Required Equi | oment: 4150 | | | | |
| Required One- | Time Miscellaneous: 4155 | | | | |
| Mandatory Tax | es: 4114 | | | | |
| | | | | | |
| Service Provider Email * | | Facility Code | Enter the 8 di | | |
| Case Manager | | | | | |
| Email Address * | | | | | |
| | | Submit | | | |

Figure 12: Veteran Readiness and Employment Authorization Form

7.1.1. Search for Vendor

The **Vendor Search** capability can be used to locate the service provider that will receive an authorization to provide services to a Participant.

To complete a vendor search:

- 1. Enter **One** or **More Fields**
 - a. Vendor Name: You can enter a partial search term, (example: Toml for Tomlinson).
 - b. **Vendor ID** (same as the Vendor's Tax ID): Must include full Vendor ID number. This number can be found in CWINRS.
 - c. **Zip**: Must include the exact vendor zip code.

- d. Address 1: Vendor address. Can do a search on partial elements (like Plant for Plantation Drive).
- 2. Select Vendor Search button. The search returns blocked and unblocked vendors.
- 3. Expand or minimize each section by selecting the **double chevrons** () to the left of the column. Information in the comments section of blocked vendors may point you to the correct unblocked vendor. You can only create authorizations on unblocked vendors.

NOTE: For the following figure (figure 13) Vendor search results with Unblocked and Blocked Vendors are listed. It is suggested that you increase your page view zoom to 200%, so you can easily view the figure.

| teran Readiness & Employment Authoriza | tion | | | | | |
|---|--|--------------------------------------|---|---|---|---|
| ech Rerittenbe | | | | | | |
| Indur Name UNV | Wendox ID | Enter 9 or 11 ogt Vendox E | | 20- 900 firmi | | |
| | | | | 1,000,000 | | |
| Winder Search Clear | | | | | | |
| Robel Webe | | | | | | |
| | | | | 7.8-5 10. No | (1) · · · · · · · · · · · · · · · · · · · | |
| Vendor Name | Vendor ID Address 1 525 w 120TH ST | Address 2 | City New YORK | State Zip | Contact | |
| | 252 M 1251H 21 | | NEW PLAN | NOV BOO27 | | |
| Company and the second second | BROOKD'N CAMPUS | UNIVERSITY PLADA | BROOKLYN | NY 11201 | | |
| | IT HILLS BEACH RD | | REDORFORD | HE DADD | 6 | |
| | BUS OFC | 1 COLLEGE CIRCLE | BANGOR | - | | |
| | 2 111 W CONCRESS ST | | OWALES TOWN | WV 25434 | | |
| | | | | | | |
| and a second state | 44055 SEEXRA HERY | | LANCASTER | CA 80504 | HAL AL | |
| | 340 BURLINGTON AVE | | DOWNERS GROVE | 8, 605.15 | 6 | |
| - | 5703 ALLHINI HALL STE 101 | | ORDRINO | HE 04400 | istra | |
| | 3 BURSARS OFFICE ORONO | 5703 ALLIMINE HALL RM 103 | ORONO | NE 04400 | 671 | |
| | | | | | | |
| | S FARMENGTON ATTIV BUSINESS I | OFFC 224 MAIN ST | RARMINGTON | ME 04938 | 11990 | |
| | ndor ID Address 1 | | City SI | | Comments | Contact |
| | 104 1 111 3 111 | | City SI MANUSSAS VI CHARLES TOWN W CHARLES TOWN W | ute Zip 2019320 V 2543416 V 2543416 | Conservate 05 BLOCKED 060518 21 BLOCK CCR 111309 25 21 BLOCK CCR 111309 25 | LL REF PMY 03072437002 LL REF PMY 03072437002 |
| | 104 2 311 3 331 4 311 5 809 | | City SA MANULASSAS IN CHARLES TOWN W CHARLES TOWN W CHARLES TOWN W REDNE N | ate Zip 2018020 V 2543416 V 2543416 V 2543416 4 0043543 | Comments 04 BLOOKD 060518 21 BLOOK COR 511309 28 21 BLOOK COR 511309 29 21 BLOOK COR 511309 29 41 BLOOK COR 511309 29 43 BLOOKED 120919 | LL ADF PAY 03072437002 1 ADF PAY 03072437002 1 ADF PAY 03073437002 AUF 02400093712 DUF P |
| | 104 2 111 3 111 4 111 5 KR1 1 5 KR1 2 570 4 000 | | City SA MANUSSAS UN CHARLES TOWN W CHARLES TOWN W CHARLES TOWN W REDRE NO BURLENCTON VT BURLENCTON VT | ate Zip 2018020 V 2543416 V 2543416 V 2543416 4 0043543 1 0540034 | Comments 05 8,0000 040518 21 80,000 008 111309 28 21 80,000 008 111309 28 21 80,000 008 111309 28 21 80,000 008 111309 2 44 80,0000 120511 296 | LL AEF PAY 03072437002 1 REF PAY 03072437002 1 REF PAY 03072437002 REF PAY 03017437002 REF PAY 03017544005 |
| | 104 111 311 311 4111 5 801 1 800 | | City SA MANUSSAS UN CHARLES TOWN W CHARLES TOWN W CHARLES TOWN W REDRE N NRLINCTON VT BURLINCTON VT | ate Zip 20110200 2543410 2543410 2543410 0043241 05403541 05403541 054055541 054055541 054055541 054055541 0540555541 0540555541 0540555541 054055555541 05405555555555555555555555555555555555 | Commercial 05 BLOCKID 040513 21 BLOCK COR 511309 20 21 BLOCK COR 511309 20 21 BLOCK COR 511309 20 31 BLOCKID 1101019 40 BLOCKID 100119 44 BLOCKID 100119 46 BLOCKID 052412 2146 BFT ADD 062719 | LL AEF PAY 03072437002 1 REF PAY 03072437002 1 REF PAY 03072437002 REF PAY 03017437002 REF PAY 03017544005 |
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| | 104 2 311 3 321 4 311 5 KU 2 5KU 2 000 2 Non 2 Non 2 Com | | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 24 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 2046 BFT ADD 012412 2046 BFT ADD 012412 2045 | L ADF MAY 03073437002 1 ADF MAY 03073437002 ADF MAY 03073437002 ADF MAY 030174437002 ADF MAY 03017544000 ADF MAY 04104735205 |
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| nt for temper and the temper and the temper and the temperature and the temperature an | 104 2 111 3 111 4 111 5 50 6 000 2 100 2 100 2 100 2 100 2 100 2 100 2 100 | | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 24 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 2046 BFT ADD 012412 2046 BFT ADD 012412 2045 | L ADF MAY 03073437002 1 ADF MAY 03073437002 ADF MAY 03073437002 ADF MAY 030174437002 ADF MAY 03017544000 ADF MAY 04104735205 |
| et for benegat and for any of the course and for any of the course and for any of the course of the course and for any of the course of the co | 104 2 111 3 111 4 111 5 50 6 000 2 100 2 100 2 100 2 100 2 100 2 100 2 100 | | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 24 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 2046 BFT ADD 012412 2046 BFT ADD 012412 2045 | L AGF MAY 03072437002 1 68F May 03072437002 Roy 0200005712 0.04 1 68F May 030174427002 Roy 0200005712 0.04 1 68F May 03017544005 82F May 04106725205 |
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| et for beingen and the | 104 2 111 3 111 4 111 5 50 6 000 2 100 2 100 2 100 2 100 2 100 2 100 2 100 | | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 24 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 2046 BFT ADD 012412 2046 BFT ADD 012412 2045 | L AGF MAY 03072437002 1 68F May 03072437002 Roy 0200005712 0.04 1 68F May 030174427002 Roy 0200005712 0.04 1 68F May 03017544005 82F May 04106725205 |
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| A for heavy and the many most the | 104 2 11 3 12 4 11 5 82 2 87 2 90 2 87 2 87 2 90 2 87 2 90 2 97 3 87 2 90 2 97 3 87 2 90 2 97 3 87 2 97 3 87 2 97 3 87 2 97 3 87 2 97 3 87 3 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | 2 REF Her 02072437002 1 REF Her 02073437002 REF Her 02073437002 Ref Her 02073437002 Ref Her 020173437002 8 REF Her 02017344005 8 REF Her 0201734405 8 REF Her 0201734405 |
| | 104 2 11 3 12 4 11 5 82 2 87 2 90 2 87 2 87 2 90 2 87 2 90 2 97 3 87 2 90 2 97 3 87 2 90 2 97 3 87 2 97 3 87 2 97 3 87 2 97 3 87 2 97 3 87 3 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | 2 ADF Her 02072437902 1 ADF Her 02072437902 ADF Her 02072437902 ADF Her 02070437902 ADF Her 02017447902 4 ADF Her 0201794400 ADF Her 04106735205 |
| | 104 2 11 3 12 4 11 5 82 2 87 2 90 2 87 2 87 2 90 2 87 2 90 2 97 3 87 2 90 2 97 3 87 2 90 2 97 3 87 2 97 3 87 2 97 3 87 2 97 3 87 2 97 3 87 3 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | L AGF MAY 03072437002 1 68F May 03072437002 AGF May 03072437002 AGF May 03072437002 AGF May 03017544005 AGF May 0301754405 AGF May 04106725205 |
| et for being with the second s | 104 111 121 411 5 KU 2 500 2 000 2 00 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | L AGF MAY 03072437002 1 68F May 03072437002 AGF May 03072437002 AGF May 03072437002 AGF May 03017544005 AGF May 0301754405 AGF May 04106725205 |
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| ent han were enter han were beine ausses enter han were beine ausses enter of han were hander beine beginn enter han were hander beine enter hander enter hander en | 104 111 121 411 5 KU 2 500 2 00 2 0 2 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN W VX OMALIS TOWN W VX OMALIS TOWN W VX MALIS TOWN W VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | L AGF MAY 03072437002 1 68F May 03072437002 AGF May 03072437002 AGF May 03072437002 AGF May 03017544005 AGF May 0301754405 AGF May 04106725205 |
| ent han you water han you water han you han you han you han you han han han you han han you han han han you han han han han han han han han han han | 104 111 121 411 5 KU 2 500 2 00 2 0 2 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN IV VX OMALIS TOWN IV VX OMALIS TOWN IV VX INBLINGTON VX DOSTON VX SHELWSTON VX SHELWSTON VX SHELWSTON VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | L AGF MAY 03072437002 1 68F May 03072437002 AGF May 03072437002 AGF May 03072437002 AGF May 03017544005 AGF May 0301754405 AGF May 04106725205 |
| A for honours and the | 104 111 121 411 5 KU 2 500 2 00 2 0 2 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN IV VX OMALIS TOWN IV VX OMALIS TOWN IV VX INBLINGTON VX DOSTON VX SHELWSTON VX SHELWSTON VX SHELWSTON VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | L ADF MAY 03073437002 1 ADF MAY 03073437002 ADF MAY 03073437002 ADF MAY 030174437002 ADF MAY 03017544000 ADF MAY 04104735205 |
| et felenaet cont Transfil Teaching (Denier Feler Connes Teaching (Denier Feler Connes Teaching (Denier Connes) Teaching (Denier Connes) Teachi | 104 111 111 5 x01 2 5% 2 5% 2 5% 2 197 2 19 | (Crime II on 1) Drawn far Fak Hannan | City H MARADSAS VX OMALIS TOWN IV VX OMALIS TOWN IV VX OMALIS TOWN IV VX INBLINGTON VX DOSTON VX SHELWSTON VX SHELWSTON VX SHELWSTON VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | L ADF MAY 03073437002 1 ADF MAY 03073437002 ADF MAY 03073437002 ADF MAY 030174437002 ADF MAY 03017544000 ADF MAY 04104735205 |
| A for honours and the | 104 111 111 111 111 111 111 111 | | City H MARADSAS VX OMALIS TOWN IV VX OMALIS TOWN IV VX OMALIS TOWN IV VX INBLINGTON VX DOSTON VX SHELWSTON VX SHELWSTON VX SHELWSTON VX | ate Zig 2011020 2540400 2540400 2540400 0040540 0540004 0540004 02205 4 01055 | Commercial Commercial 21 BLOCK COR 1111009 20 21 BLOCK COR 11110109 20 21 BLOCK COR 1111009 20 23 BLOCK COR 1111009 20 43 BLOCKED 1000139 44 BLOCKED 1000139 44 BLOCKED 012412 206 BFT ADD 012412 2045 BFT ADD 012412 2045 | L AGF MAY 03072437002 1 68F May 03072437002 AGF May 03072437002 AGF May 03072437002 AGF May 03017544005 AGF May 0301754405 AGF May 04106725205 |

Figure 13: Vendor search results with Unblocked and Blocked Vendors listed

- 4. From the Unblocked Vendors list, select the **radio button** next to Vendor Providing services.
- 5. Select the **OK** button.

| ۲ | ***** | XXXXXXXX | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 224 MAIN ST |
|---|--|----------|--|--------------------------|
| 0 | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXXXX | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 37 COLLEGE AVE |
| 0 | ***** | XXXXXXXX | ***** | 46 UNIVERSITY DR |
| 0 | ***** | XXXXXXX | **** | 23 PLEASANT ST |
| 0 | ****** | XXXXXXXX | ****** | 116 OBRIEN AVE |
| 0 | ***** | XXXXXXX | ***** | 181 MAIN ST |
| 0 | ***** | XXXXXXXX | ****** | 224 N MAIN ST |
| 0 | ***** | XXXXXXX | ***** | 5703 ALUMNI HALL STE 200 |

Figure 14: Vendor Selection

- **NOTE:** Blocked vendors are vendors whose address or banking information is incorrect in the system (so they are unable to be invoiced). If there is an issue, have the vendor log into SAM.gov and update their information
 - When an Unblocked Vendor is selected and the OK button is selected, it's vendor details are populated in the Selected Vendor Details area.

| Selected Vendor De | tails | | | | | |
|--------------------|------------|-----------|--------|-------|-----|--|
| Vendor Name | Address 1 | Address2 | City | State | Zip | |
| XXXXXXXXX | XXXXXXXXXX | XXXXXXXXX | DALLAS | ТΧ | | |

Figure 15: Vendor Details

NOTE: A vendor must be selected to submit the authorization; otherwise, an error message displays on the screen. If you can't find the vendor you are searching for, contact VAFSCEnterpriseSupport@va.gov.

7.1.2. Search for Participant

The **Participant Search** capability is used to locate the Participant who is entitled to receive services from the Service Provider. To search for a Participant, follow these steps:

- 1. Enter: **Social Security Number** no dashes or spaces
- 2. Enter: VA File Number eight- or nine character number only with no special characters
- 3. Enter one or more fields and select Participant Search. Search results display.

| Social Security Number | VA File Number | Enter 8 or 9 Charecter File Number only |
|--------------------------------------|----------------|---|
| Participant Search Clear | | |
| | | |
| Participant Details | | |
| Participant Details Participant Name | Participant ID | - |

Figure 16: Search for Participant Screen

NOTE: A participant must be selected to submit the authorization; otherwise, an error message displays on the screen.

7.1.3. Review Authorization Facility/Vendor

The Review Authorization Facility/Vendor Section provides further information to the vendor or facility. To complete review authorization, follow these steps:

- 1. In the Name of Services/Assistance field (a required field) enter the **name of** services/assistance including degree type when applicable.
- 2. In the Enrollment Period section enter the following:
 - Start Date
 - End Date

NOTE: The **End Date** cannot be more than one year from the **Start Date**. If you select a date range of more than a year, an error message displays when you submit the form. If you select an End Date before the Start Date or a Start Date after the End date, you will also get an error message when you submit the form.

| Review Authorization Facility/Vendor Section |
|---|
| Name of Services/Assistance (Include Degree Type When Applicable) * Enter up to 256 Characters |
| Enrollment Period : Start Date : * End Date : * |

Figure 17: Name of Services/Assistance Sageera is this the latest screen in the UI

7.1.3.1. Using the Calendar Tool

To use the calendar tool, complete the following:

1. Select the **Calendar** to the right of the Start Date/ End Date. A calendar displays.

| Start Date : * | | | | | 雦 | | | End Date : * | # |
|-------------------|-----|-----|-----|------|-----|-----|-----|--------------|----------|
| | 3 | | | May | | | • | | |
| | | | | 2019 | | | • | | |
| Line Item Details | Sun | Mon | Tue | Wed | Thu | Fri | Sat | | |
| Line Rein Details | | | | 1 | 2 | 3 | 4 | | |
| | 5 | 6 | 7 | 8 | 9 | 10 | 11 | | |
| | 12 | 13 | 14 | 15 | 16 | 17 | 18 | | |
| | 19 | 20 | 21 | 22 | 23 | 24 | 25 | | |
| | 26 | 27 | 28 | 29 | 30 | 31 | | | |
| | | | | | | | | | |

Figure 18: Start Date Calendar Tool

2. Select a **Date** on the calendar. The field is filled with the selected date.

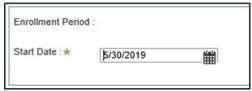


Figure 19: Date Field Filled

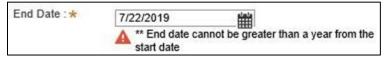


Figure 20: Date more than one year error

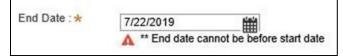


Figure 21: End Date not before Start Date error

7.1.4. Line Item Details

The Line Item Details are the approved goods/services that VBA is funding.

Complete the following:

1. Select the **Checkbox** next to the Line Item(s) that are being funded.

NOTE: At least one line item must be selected to submit the authorization; otherwise, an error message displays on the screen.

A Notes field displays to the right of all checked line items for optional additional information.

| Line Item Details | | |
|---------------------------------------|---------|---|
| Tuition and Fees: 4107 | Notes : | |
| ☑ Required Books: 4108 | Notes : | The Beauty of Butterflies How to Have Your Cake and Eat it Too |
| Required Supplies: 4109 | | |
| Required Handling Charges: 4112 | | |
| Required Tutorial: 4113 | | |
| Required Equipment: 4150 | | |
| Required One-Time Miscellaneous: 4155 | | |

Figure 22: Line Item Details

7.1.5. Authorization Fields

The fields at the bottom of the authorization form include:

- Service Provider Email the email address for the Service Provider point of contact (POC), typically the School Certifying Official (SCO).
- Case Manager Email Address the authorizing case manager. The Case Manager Email Address field is auto populated. The field is still editable to allow for an alternative VA POC who has an IPPS account configured as a Case Manager or Supervisor.
- Facility Code 8-digit code assigned to the facility. This code can be found in CWINRS.

Complete the following:

- 1. Enter **information** into all required field denoted by an asterisk.
- Select the Submit button. An authorization is created and email is generated to send to the Service Provider. You can view the authorization in My Authorizations (see, <u>My</u> <u>Authorizations</u>).

| Service Provider Email <mark>*</mark> | info@utexas.edu | Facility Code <mark>*</mark> | 12345678 |
|--|-----------------|------------------------------|----------|
| Case Manager Email Address | | | |
| | | Submit | |

Figure 23: Authorization Fields

NOTE: Upon selecting Submit, the email address entered for the Service Provider receives the New Authorization Notification email from IPPS.

NOTE: Only a Case Manager or Supervisor can submit an authorization.

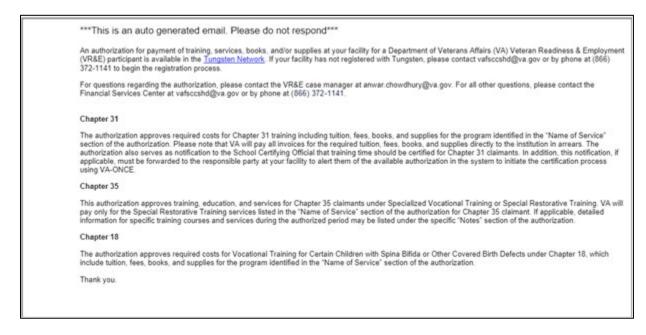


Figure 24: Auto Generated Email Example

NOTE: If any required fields have not been correctly filled, an error message displays. Select *OK*, make appropriate corrections, and select *Submit* again.

7.2. My Authorizations

The My Authorizations selection is located in the left navigation bar. It provides the Case Manager or Supervisor a list of authorizations that have been created by you after they have been submitted. Complete the following to view your authorizations:

1. From the left navigation bar Process Work area., select the **My Authorizations** button. The My Authorizations Report displays a list of authorizations.

| U.S. Department of Veterans Affairs | |
|---|---|
| | < |
| Y Process Work | |
| Invoice Inquiry System Authorization Form My Authorizations Station Authorizations National Contract Invoices iFAMS Station Inquiry System | |

Figure 25: Selecting My Authorizations

- 2. To cancel the Authorization, select the Cancel button for the authorization..
- 3. To view the Authorization's PDF, select the View PDF Image link.
- 4. To copy the Authorization, select the **Copy** button for the authorization.
- 5. Select **Export** to Excel to export the list of your Authorizations.

| | | | | | | | | | | Ð | xport to Exc | _ | | |
|---------------------|------------------|-------------|--------------------|-----------------|-------------|--------------------|------------------|--------------------------------|---------------|-----------------|--------------|----------|----------------|------|
| Created DateTime 🔻 | Authorization #* | SSN * | Participant Name * | Participant ID* | VA File # * | Enrollment Start * | Enrollment End * | Vendor Name 👻 | Vendor Code * | Facility Code * | Status* | | * | |
| 02/02/2022 09:15 AM | 101240054 | 123-45-6789 | TESTERA TESTER | 41 | | 02/02/2022 | 02/23/2022 | SUNY UPSTATE MED UNIV | 16146957110 | 123 | Open | Cancel | View PDF Image | Copy |
| 12/10/2021 10:46 AM | 101240045 | 123-45-6789 | TESTERA TESTER | 41 | | 12/10/2021 | 12/10/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 567 | Open | Cancel | View PDF Image | Cop |
| 2/09/2021 04:08 PM | 101240044 | 123-45-6789 | TESTERA TESTER | 41 | | 12/01/2021 | 12/30/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 678 | Open | Cancel | View PDF Image | Cop |
| 2/09/2021 03:48 PM | 101240043 | 123-45-6789 | TESTERA TESTER | 41 | | 12/09/2021 | 12/09/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 678 | Cancelled | | View PDF Image | Сор |
| 2/09/2021 03:45 PM | 101240041 | 123-45-6789 | TESTERA TESTER | 41 | | 12/09/2021 | 12/09/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 345 | Open | Cancel | View PDF Image | Cop |
| 1/16/2021 01:41 PM | 101240024 | 123-45-6789 | TESTERA TESTER | 41 | | 11/16/2021 | 11/16/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 123 | Open | Cancel | View PDF Image | Сор |
| 1/16/2021 01:36 PM | 101240022 | 123-45-6789 | TESTERA TESTER | 41 | | 11/16/2021 | 11/16/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 123 | Cancelled | | View PDF Image | Сор |
| 1/01/2021 10:41 AM | 101240007 | 123-45-6789 | TESTERA TESTER | 41 | | 11/01/2021 | 11/01/2021 | UPPER CAPE COD REGL VOCATIONAL | 042382003 | 104 | Open | Cancel | View PDF Image | Сор |
| 9/17/2021 01:43 PM | 101140036 | 123-45-6789 | TESTERA TESTER | 41 | | 09/17/2021 | 09/17/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 1234 | Open | Cancel | View PDF Image | Сор |
| 07/23/2021 02:28 PM | 101140035 | 123-45-6789 | TESTERA TESTER | 41 | | 07/23/2021 | 07/23/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 34567 | Open | Cancel | View PDF Image | Cop |
| 6/07/2021 03:13 PM | 101140023 | 123-45-6789 | TESTERA TESTER | 41 | | 06/01/2021 | 06/30/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 12345678 | Open | Cancel | View PDF Image | Cop |
| 6/07/2021 02:58 PM | 101140022 | 223-19-1041 | KRYSTAL KAREY | 829940 | 223-19-1041 | 06/07/2021 | 06/30/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 12 | Cancelled | | View PDF Image | Сор |
| 06/07/2021 02:54 PM | 101140021 | 223-19-1041 | KRYSTAL KAREY | 829940 | 223-19-1041 | 06/07/2021 | 06/30/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 12 | Open | Cancel | View PDF Image | Сор |

Figure 26: My Authorizations Report

7.2.1. Station Authorizations

Case Managers, Supervisors, Site Admins and Read Only users will have the ability to view a list with all authorizations created at the station. Users will be able to filter by all the fields and have insight into the Authorizations generated across the station.

From the left navigation bar Process Work area, complete the following:

1. Select the **Station Authorization** button. The My Authorizations Report displays a list of authorizations.

| U.S. Department of Veterans Affairs |
|---|
| |
| Process Work |
| Invoice Inquiry System Authorization Form My Authorizations Station Authorizations National Contract Invoices iFAMS Station Inquiry System |

Figure 27: Selecting Station Authorizations

NOTE: When searching through a large list, select the pagination feature for navigation. It is located in the top right section of the Station Authorization List screen. This feature is not available for My Authorizations.

| My Work Station Aut | :ho = | | | | | | | | | | | |
|---------------------|---------------------|----------------|--------------------------|------------------|-------------|--------------------|----------------|-----------------------|-----------------|----------------|-----------|----------------|
| | | | | | | | | | | 144 4 | Page 1 | of 28 🕨 🗰 |
| Created DateTime 🔻 | * Authorization # * | SSN * P | articipant Name * | Participant ID * | VA File # 👻 | Enrollment Start * | Enrollment End | Vendor Name | * Vendor Code * | Facility Code* | Status * | * |
| 02/02/2022 09:15 AM | 101240054 | 123-45-6789 TI | ESTERA TESTER | 41 | | 02/02/2022 | 02/23/2022 | SUNY UPSTATE MED UNIV | 16146957110 | 123 | Open | View PDF Image |
| 01/27/2022 11:49 AM | 101240052 | 144-12-8888 C | RSC B SIXTEEN | 823645 | 144-12-8888 | 01/03/2022 | 01/27/2022 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |
| 01/20/2022 04:13 PM | 101240051 | 139-44-0101 D | EPENDENCY ONE CISTONTEST | 836774 | 139-44-0101 | 01/05/2022 | 01/20/2022 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |
| 12/23/2021 10:37 AM | 101240050 | 144-12-8888 C | RSC B SIXTEEN | 823645 | 144-12-8888 | 12/01/2021 | 12/23/2021 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |
| 12/21/2021 10:21 AM | 101240049 | 123-45-6789 T | ESTERA TESTER | 41 | | 12/12/2021 | 12/21/2021 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |
| 12/20/2021 02:33 PM | 101240048 | 144-12-8888 C | RSC B SIXTEEN | 823645 | 144-12-8888 | 12/01/2021 | 12/20/2021 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |
| 12/16/2021 02:13 PM | 101240047 | 343-09-0440 30 | DHN FISHER | 638616 | 343-09-0440 | 12/01/2021 | 12/17/2021 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |
| 12/14/2021 04:33 PM | 101240046 | 343-09-0440 30 | DHN FISHER | 638616 | 343-09-0440 | 12/01/2021 | 12/16/2021 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |
| 12/10/2021 10:46 AM | 101240045 | 123-45-6789 T | ESTERA TESTER | 41 | | 12/10/2021 | 12/10/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 567 | Open | View PDF Image |
| 12/09/2021 04:08 PM | 101240044 | 123-45-6789 T | ESTERA TESTER | 41 | | 12/01/2021 | 12/30/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 678 | Open | View PDF Image |
| 12/09/2021 03:48 PM | 101240043 | 123-45-6789 T | ESTERA TESTER | 41 | | 12/09/2021 | 12/09/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 678 | Cancelled | View PDF Image |
| 12/09/2021 03:45 PM | 101240041 | 123-45-6789 T | ESTERA TESTER | 41 | | 12/09/2021 | 12/09/2021 | SUNY UPSTATE MED UNIV | 16146957110 | 345 | Open | View PDF Image |
| 12/08/2021 10:36 AM | 101240040 | 144-12-8888 C | RSC B SIXTEEN | 823645 | 144-12-8888 | 12/01/2021 | 12/08/2021 | OFFICE DEPOT INC | 592663954 | 101 | Open | View PDF Image |

Figure 28: Station Authorization List

7.2.2. Copying an Authorization to Create a New Authorization

Case Managers and Supervisors will see a "Copy" button in "My Authorizations." When the button is selected, a new Authorization is created with all data **except** the enrollment dates. The user can either accept the pre-populated data (such as when a Veteran is returning to the same school next year) or modify the data (such as sending another Veteran to the same school).

If the vendor data is no longer valid, the Vendor field will not populate. For example, several vendors need to update their banking details, and these vendors will be blank on the copied Authorization.

7.2.3. Filtering Authorizations

To use filters in a My Authorization Report, complete the following:

1. Apply a filter for the column title by selecting the **downward arrow** located next to the top right of each column title. After selecting the filter, a Filter Dialog box will display a list of information specific to that column.

| _ | | | | | | | | | | | |
|------|-------------------|-----------------|-----|------------------|----------------|-----------|------------------|----------------|-------------|---------------|--------|
| | | | * | - | | | | a | | - | A. |
| | - | | | - | | | - | | - | | |
| | Created DateTime | Authorization # | SSN | Participant Name | Participant ID | VA File # | Enrollment Start | Enrollment End | Vendor Name | Facility Code | Status |
| - 11 | created paternine | Authorization # | 331 | Participant name | Participant 10 | VATIC # | chronment start | chroniment chu | venuor name | racinty coue | Status |
| | | | | | | | | | | | |

Figure 29: Dropdown Arrows for each Column Title to Filter the Authorizations

| | Clear Filter | |
|------|--------------|--|
| | 101-10-0002 | |
| | 123-45-6789 | |
| | 920-10-0813 | |
| | | |
| | | |
| | | |
| | | |
| Sear | ch Text | |
| | | |
| | | |
| | Apply Cancel | |

Figure 30: Example Filter Dialog Box

- 2. Select the **Option** you want to filter by.
- 3. Select the **Apply** button. Only Authorizations containing that option display.

| | Clear Filter 101-10-0002 |
|-------|-----------------------------|
| | |
| | 123-45-6789 |
| | 920-10-0813 |
| | |
| | |
| | |
| | |
| Searc | ch Text |
| | |
| | Apply Cancel |

Figure 31: Select Filter Option

| | 20 | - 3 | | | | * | * | * | ÷ | | * | |
|---------------------|-----------------|-----|------------------|----------------|-----------|------------------|----------------|-------------|---------------|--------|--------|----------------|
| Created DateTime* | Authorization # | SSN | Participant Name | Participant ID | VA File # | Enrollment Start | Enrollment End | Vendor Name | Facility Code | Status | | |
| 07/01/2019 2:54 PM | 101940098 | | ESTERA TESTER | 41 | | 07/01/2018 | 07/01/2019 | | 41 | Cancel | | View PDF Image |
| 06/10/2019 11:32 AM | 101940066 | | ESTERA TESTER | 41 | | 06/07/2019 | 08/30/2019 | | . 1 | Cancel | | View PDF Image |
| 06/03/2019 10:48 AM | 101940037 | | ESTERA TESTER | 41 | | 09/01/2019 | 12/31/2019 | | 12345678 | Open | Cancel | View PDF Image |
| 06/03/2019 10:38 AM | 101940036 | | ESTERA TESTER | 41 | | 09/01/2019 | 12/31/2019 | | . 12345678 | Open | Cancel | View PDF Image |
| 05/28/2019 1:51 PM | 101940025 | | ESTERA TESTER | 41 | | 05/21/2019 | 05/31/2019 | | (12345678 | Cancel | | View PDF Image |

Figure 32: Filtered List

7.2.4. Clearing an Authorization Report Filter

To cancel a report filter, complete the following:

1. Select **Clear Filter**. You will return to the complete list of authorizations in your Authorization Report. The complete list of authorizations re-displays.

| | Clear Filter |
|------|-----------------|
| | RONNY JON HILLY |
| | TESTERA TESTER |
| Sear | ch Text |
| | |
| | |

Figure 33: Clear Filter

7.2.5. Cancelling an Authorization

You can only cancel your own authorization

To cancel your authorization, complete the following:

1. Select the **Cancel** button next to the authorization with a Status of Open. A dialog box displays asking for you to confirm that you want to cancel the authorization.

NOTE: You can only cancel authorizations with a status of open.



Figure 34: Canceling an Authorization

2. Select the **Submit** button. The authorization is canceled, the Status changes from Open to Cancel, and the Cancel button no longer displays

| Cancel Authorization 101940175 ? Back Submit | | : |
|---|--------------------------|----------|
| Back | Cancel Authorization 101 | 940175 ? |
| | Back | |

Figure 35: Cancel Authorization Prompt

| | | Export to Excel Refresh |
|--------|---|-------------------------|
| Status | • | • |
| Cancel | | View PDF Image |
| Cancel | | View PDF Image |

Figure 36: Canceled Status for Authorization

In addition, an auto-generated email is sent to the Service Provider.

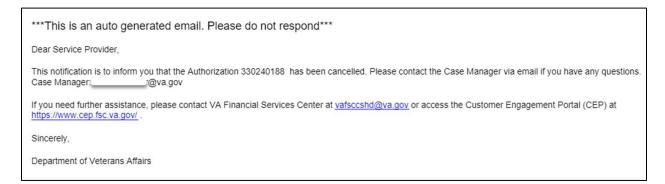


Figure 37: Autogenerated email sent to service provider

7.2.6. Viewing a PDF of an Authorization

To view a PDF of an Authorization, complete the following:

- 1. Complete the steps in <u>Section 7.2 My Authorizations</u> to open the My Authorization Report.
- 2. Select View PDF Image to view the PDF. The PDF displays.

| My Authorizations Re | eport | | | | | | | | | | | | |
|----------------------|--------|---------------------|-------------|-----------------------|----------------|------------|------------------|----------------|-------------------------|---------------|-------------|--------|----------------|
| Created DateTime ¥ | ▼ A | • uthorization # | SSN | • Participant Name | Participant ID | File # | Enrollment Start | Enrollment End | • Vendor Name | Facility Code | * Status | • | * |
| 04/23/2019 3:38 PM | 10 | 01940000 | 920-10-0813 | RONNY JON HILLY | 823656 | 920-10-081 | 3 04/25/2019 | 04/28/2019 | THE UNIVERSITY OF TEXAS | 12345678 | Open | Cancel | View PDF Image |

Figure 38: View PDF Image

| - | ment of Veterans Affairs adiness & Employment Authorization |
|--------------------------------|--|
| | Identifying Data |
| il | Authorization # |
| Auth | orization to Facility/Vendor Details |
| 08/01/2017 - 12/31/2017 | Service Provider Address |
| Veteran to obtain an MA degree | Service Provider Email |
| | Line Item Details |
| Description | Notes |
| Tuition and Fees: 4107 | |
| Mandatory Taxes: 4114 | |

Figure 39: View PDF Image Results

7.2.7. Refreshing the Screen

If the Refresh button displays, complete the following:

- 3. To update the screen contents to display the most current information. Select the **Refresh** button.
 - For example, if you had the My Authorizations open in one tab and created an authorization in another tab, the refresh button would update the list to include the newly created authorization.

| My Authorizations Re | eport | | | | | | | | | Б | port to Excel | Refresh |
|-----------------------|----------------------|-------------|-----------------------|----------------|-----------|-----------------------|---------------------|---------------------------------------|---------------|--------|---------------|----------------|
| ा Created DateTime | • Authorization # | Vanlary. | * Participant Name | Participant ID | VA File # | * Enrollment Start | * Enrollment End | • • • • • • • • • • • • • • • • • • • | Facility Code | Status | | |
| 06/03/2019 10:48 AM | 101940037 | 123-45-6789 | TESTERA TESTER | 41 | | 09/01/2019 | 12/31/2019 | UTMB HLTHCARE SYSTEMS INC | 12345678 | Open | Cancel | View PDF Image |
| 06/03/2019 10:38 AM | 101940036 | 123-45-6789 | TESTERA TESTER | 41 | | 09/01/2019 | 12/31/2019 | BAYLOR SCOTT & WHITE MEDICAL | 12345678 | Open | Cancel | View PDF Image |

Figure 40: Refresh Button

7.3. Certifying Invoices

The certification Work List is a list of all invoices that need to be certified.

| CertificationList_Au | uth | | | | | | | | Action |
|----------------------|----------------------|---|------------------|-----------------|----------------------------|-------------------------|-------------|-----------------------------------|--------------|
| | | | | | | | | Generated on August 19,2019 02 | :45:43 PM |
| Filtered by: | : = Pending-Certific | cation and IPPSUserID = vafsckumarbtest6) or (Statu | isWork = Pending | HighValueInvoic | eReview and NextApproverVR | E = CaseManager and Cer | tifiedBy != | vafsckumarbtest6)) and stationN | um = 101) |
| Displaying 12 reco | | | | | | | | | |
| DLN | PONumber | VendorName | vendorID | TotalDue | ParticipantName | StatusWork | Age | invoiceReceivedDate | VAFileNumber |
| 22596300001 | 101940152 | THE UNIVERSITY OF TEXAS | 74600020313 | 979770 | SILVIA SHRUBBERY | Pending-Certification | 30 | Jul 20, 2019 1:00:00 AM | 933-93-1045 |
| 22596300005 | 101940163 | SAMUEL B RAMOS | 093387359 | 979660 | BAZOOKA BUBBLE GUM | Pending-Certification | 30 | Jul 20, 2019 1:00:00 AM | 323-32-3232 |
| 21196300002 | 101940144 | THE UNIVERSITY OF TEXAS | 74600020312 | 97223 | BAZOOKA BUBBLE GUM | Pending-Certification | 40 | Jul 10, 2019 1:00:00 AM | 323-32-3232 |
| 21096300001 | 101940142 | THE UNIVERSITY OF TEXAS | 74600020311 | 97999 | KRYSTAL KAREY | Pending-Certification | 44 | Jul 6, 2019 1:00:00 AM | 223-19-1041 |
| 17796010949 | 101876128 | BETHANNE A KAPP | 000856366 | 25 | JOHN HALL | Pending-Certification | 55 | Jun 26, 2019 12:00:00 AM | 101-10-0001 |
| 18996300003 | 101940105 | THE UNIVERSITY OF TEXAS | 74600020305 | 102000 | KRYSTAL KAREY | Pending-Certification | 59 | Jun 21, 2019 1:00:00 AM | 223-19-1041 |
| 18396300002 | 101940101 | MASS COLG OF PHARM | 042104700 | 14600 | TESTERA TESTER | Pending-Certification | 65 | Jun 15, 2019 1:00:00 AM | |
| 18396300003 | 101940101 | MASS COLG OF PHARM | 042104700 | 14600 | TESTERA TESTER | Pending-Certification | 65 | Jun 15, 2019 1:00:00 AM | |
| | | | | 139000 | JOHN HALL | Pending-Certification | 886 | Mar 16, 2017 1:00:00 AM | 101-10-0002 |
| 34789000002 | 101940041 | SIEMENS HEALTHCARE DIAGNOSTICS | | | | | | | |

Figure 41: Certification My Work

7.3.1. Low Dollar Invoices

To process a low-dollar invoice, complete the steps noted in the following subsections. Only a Case Manager or Supervisor can approve low dollar invoices.

7.3.1.1. Opening a Low Dollar Invoice

To open low dollar invoices, complete the following:

- 1. From the My Work tab, select the assigned **Station** for your user role (Case Manager or Supervisor) from the drop down menu.
- 2. Or if you have access to multiple stations, select the **Station** for which you are processing invoices. The appropriate WorkList screen displays.
- 3. Select the **Invoice** to process. The invoice image opens in a separate window. The certification details screen displays

| My Work | | | | | | | | | | |
|---------------------------------|--------------------------|--------------|------------|------------|------------------------------|---|-------|-------------------|-------------------|-----|
| Select a Station | [101 | V | | | | | | | | |
| WorkList | | | | | | | | | | |
| _ | | | | | | | | | Export | _ |
| Document Locator Number V | Auth Number V | VendorName V | VendorID + | Amount 🔻 🕶 | Participarit, Name | Certification, Status | Age 🔻 | Received, Date | VA File Number | 100 |
| Locator - | | VendorName V | VendorID V | Amount 🗸 🕶 | | | Age 🔻 | Received, | VA File | |
| Locator Number V | Number | | | | Name | Status Pending- | Age | Received. Date | VA File Number | |
| Locator Number V XXXXXXXX | Number V XXXXXXXXXXXX | X00000000000 | X000000X | 139,000.00 | Name JOHN HALL TESTERA | Status Pending- Certification Pending- | 887 | Received, Date | VA File Number | |

Figure 42: WorkList Screen

| VA Test Account UAT | | Invoice | | | |
|-------------------------------------|-----------|---|---------------|--|-----------------|
| Bill From | | Bill To | | Invoice No. | NCAslin503 |
| | | Department of Veterans Affairs - Test E | liver Account | PO Number | 36828720C00040 |
| VA Test Account UAT | | 1 Test Drive | ayer Account | | |
| 2680 S Val Vista Dr #152 | | PO BOX 0 | | Vendor Code | 201195460 |
| TESTMY | | Austin | | Invoice Date | 05/18/2020 |
| TESTRG Gilbert | | TX | | Currency | US Dollar |
| AZ | | 32308 | | Amount to pay | 30,000.00 |
| AZ 85295 | | | | | 00,000.00 |
| United States | | Contact | | | |
| United States | | Contact | | Sent by Tungsten | 05/18/2020 |
| | | Email | | Network on | |
| Contact Tel | | Email | | Tungsten Network Transaction Number | BAA000016677289 |
| Email | | Ship To | | Supplier Tungsten Number | AAA669397606 |
| Ship From | | Department of ∨eterans Affairs - Test E 1 Test Drive | Suyer Account | Buyer Tungsten Number | AAA408798528 |
| VA Test Account UAT | | PO BOX 0 | | Status | Sent |
| 2680 S Val Vista Dr #152 | | Austin | | | |
| Gilbert | | TX | | 0.1 | |
| AZ | | 32308 | | Delivery Note | |
| 85295 | | | | Payment Due By | 05/18/2020 |
| United States | | | | | |
| | | | | | |
| | | | | | |
| Remit To Address | | | | | |
| VA Test Supplier - RemitToCompany | Name | | | | |
| John Doe- RemitToContactName | | | | | |
| 1234 East Peidmont Rd- RemitToAd | | | | | |
| PO BOX 7357: Additional address lin | e. | | | | |
| Austin | | | | | |
| TX | | | | | |
| 30067 | | | | | |
| UNITED STATES | | | | | |
| CLIN / Description Quan | tity Unit | Unit Price | Total | Discount % Disco | ount Amou |
| PO | | | | | |
| Line | | | | | |
| 1 Line Item | 6 Each | 5,000.00 | | 0.00 0 | .00 30.000.00 |

Figure 43: Invoice Image Example

7.3.1.2. Certification Screen

The Certification screen include the following sections:

- 1. Audit Link provides a history of the invoice (see, Viewing Audit Information)
- 2. Invoice Summary contains metadata submitted from IPPS and is collapsed by default. You can view this information by selecting the chevrons. This includes:
 - a. Document Locator Number (DLN) Number the unique ID of every invoice in IPPS
 - b. Status of the invoice (see, <u>List of Status Conditions</u> for a list of possible statuses)
- 3. Authorization Details this area is pre-populated from the invoice and authorization. There are also links to open the Authorization and Invoice images.
- 4. Invoice Line Details this area displays the items that were entered by the service provider

- a. From the dropdown menu, select the **Budget Object Code (BOC)**
- b. If you disagree with the amount provided on the invoice, you have the ability to update it.
- 5. Provide Certification Decision this area allows you to Accept or Refuse the invoice (or return it to the reviewer for high-dollar invoices).

If there's a difference between the payment amount and the total of the line amounts, complete the following:

- a. Open the **invoice image** to see if there's a handling charge and/or tax amount included.
- b. If you see one, select the **plus** sign.
- c. Add the amount using the appropriate **BOC**.
- 6. Notes Allows for additional notes to be filed with the invoice (see, <u>Notes and Attachments</u>).
- 7. Attachments Allows for additional attachments to be filed with the invoice (see, <u>Notes</u> <u>and Attachments</u>).

| iuremary 2 | DLN 20816300002 | Status | Pending-Certification | | | | 1 e Auto |
|---|--|--|---|--|--|---|-------------------|
| Percetter Details | 3 | | | | | | |
| voice is outs | side the Enrolment period | | | | | | |
| Participant Nan Participant ID UA the Number Authorization N | 41 | Vendor Name Vendor ID Envolment Start Envolment End | SURY UPSTATE MED UNIV 16146(967110 07/23/2021 07/23/2021 | Invoice Date Invoice Received Date Invoice Number Payment Amount | 02062017 06082021 TEST08 \$126.23 | | |
| lev Authoriza lev Invokce In | and the second sec | | | | | | |
| | 4 | | | | | | |
| ine | Description | | | вос | | | Amount to Apply |
| | EMERGENCY PRESCRIPTION I | DISPENSING ADMINIST | RATIVE PEES | Select one | | ~ | 245.00 g |
| | | | | | | | |
| D | EMERGENCY PRESCRUPTION I | INGREDIENT COSTS | | Select one | | v | \$711.50 |
| nde Gettifuatur De | | O Refue | | Select one | | | 571150), g |
| nile Gettifugtur De | | | Submit Cancel | | | | 57+150) <u>g</u> |
| inte Gettikastan De | 5 | | Submit Cancel | | | | 5711 SÚ 🖠 |
| 2 D anto bathater for Accept Accept Accept Accept Accept | 5 | | Submit Cancel | | | | 5711 50 g |

Figure 44: Certification Details Screen

• To add a Line to Invoice Line Details, select the Line Details Plus Sign icon.

| Line | Description | BOC | Amount to Apply |
|------|---------------------------------------|------------------------|-----------------|
| 1 | BUR TN40RFL TRANSNASAL 4MM RND FLUTED | Required Books: 4108 | ▶ 1529.80 |
| 1 | BUR TN40RFL TRANSNASAL 4MM RND FLUTED | Tuition and Fees: 4107 | ✓ 1529.80 😭 |

Figure 45: Line Details Plus Sign

• Handling Charges and Mandatory Taxes can be added.

| nvoice Line Deta | h | | |
|------------------|---|--|-----------------|
| Line | Description | вос | Amount to Apply |
| 1 | IST LVL1 AQUS CTL(10X1.7) | Tuition and Fees: 4107 | 26.23 |
| 2 | IST LVL2 AQUS CTL | Required Books. 4108 | 25.00 |
| 3 | IST LVL3 AQUS CTL(10X1.7) | Required Supplies: 4109 | 25.00 |
| 4 | Handling Charges* Applicable only to books & supplies | Handling Charges * Applicable only to books & supplies: 4112 💙 | 25.00 |
| 5 | Mandatory Taxes | Mandatory Taxes: 4114 | 25.00 |

Figure 46: Line Details - Handling Charges and Mandatory Taxes Added

7.3.1.3. Accepting an Invoice

• If the invoice is within the threshold for approval, the certifying official sees the Accept/Refuse radio buttons on the certification screen.

| Provide Certification Decision | |
|--------------------------------|----------------|
| Accept | ○ Refuse |
| | |
| | |
| | |
| | Submit Cancel |
| | Subinit Cancel |
| | |

Figure 47: Provide Certification Decision

• If the books or supplies subtotal amounts are <=\$5000 (or tuition <= \$25,000), no approvals are needed after certification.

To accept a low dollar invoice, complete the following:

- 1. From the Invoice Line Detail screen, ensure that the **Amounts** are **correct** for each Line Item by completing the following:
 - a. Select a **BOC** from the BOC drop down menu.
 - b. Update the Amount to apply, as needed, directly into the Amount to Apply field.

- c. If needed, delete a Line Item by selecting the **Trashcan** to the right of the Amount to Apply field.
- d. If needed, select **plus** icon to add another invoice line detail.

| Invoic | e Line Details | | |
|--------|---|--|-----------------|
| Line | Description | вос | Amount to Apply |
| 1 | Progress billing for Little Rock Medical Center Interim payment 8 | Select one Tutition and Fees: 4107 Required Books: 4108 | 1150.00 |
| 1 | Progress billing for Little Rock Medical Center Interim payment 8 | Required Books: 4109 Required Supplies: 4109 Required Handling Charges and Taxes; 4112 | 4000.00 |
| • | | Required Tutorial: 4113 Required Equipment: 4150 Required One-Time Miscellaneous: 4155 | |
| | | Required One-Time Miscellaneous, 4155 | |

Figure 48: Budget Object Code and Amount Entry

2. Select **Accept** in Provide Certification Decision screen. Depending on the condition of the invoice, additional fields may display. If it's late or if amounts mismatch and so on, you are asked to provide further information. At a minimum, you are asked for the Date of Acceptance and a checkbox is provided if this is the final invoice to be approved for this authorization.

| Provide Certification Decision | |
|--------------------------------|---------------|
| Accept | ⊖ Refuse |
| | |
| | |
| | Submit Cancel |
| | |

Figure 49: Select Accept in Provide Certification Decision Screen

- 3. Enter the following required fields denoted by an asterisk:
 - a. Date of Acceptance: This field auto populates with the current date, but you can also enter the date in mm/dd/yyyy format or use the Calendar icon to select dates.

| Provide Certification Decision | | | |
|--------------------------------|----------|----------|-----------|
| Provide Certification Decision | | O Refuse | |
| | | | |
| Date Of Acceptance * | 2/9/2022 | | ** |

Figure 50: Date of Acceptance Auto Populates or can be Selected

- b. Verify the Total Certified Amount when accepting the invoice.
 If the Payment Amount is not equal to Certified Amount, complete the following:
 - Review the Payment Amount in the Authorization Details section and compare it to the Amount to Apply in the Invoice Line Details section.

• If the Certified Amount is less than Payment Amount a reason must be provided.

| Authoritation Detail | in . | | | | | |
|--|------------------------------|--|--|--|---|-----------------|
| Invoice is o | utside the Enrollment period | | | | | |
| Participant N Participant II VA file Numb Authorization | D 41 | Vendor Name Vendor ID Enrollment Start Enrollment End | UPPER CAPE COD REGL VOCATIONAL 042382003 05/01/2021 05/31/2021 | Invoice Date Invoice Received Date Invoice Number Payment Amount | 03:09:2017 12:02:2019 TSTCREDITMEMO1 \$19:00 | |
| View Author View Invoice Invoke Line Dateils | | | | | | |
| Line | Description | | | BOC | | Amount to Apply |
| 1 | 111011111 | | | Required One-Tir | ne Miscellaneous: 4155 🗸 | 10.00 |
| • | | | | | | |

Figure 51: Authorization Details and Invoice Line Details Sections

| Provide Certification Decision | | | | | |
|---|------------------------------|----------|-----------|-------|--|
| Accept | | O Refuse | | | |
| | | | | | |
| Date Of Acceptance * | 2/9/2022 | | ** | | |
| Total Certified Amount | \$10.00 | | | | |
| "Is this a Final Invoice?" | | | | | |
| Late Payment Reason ★ | Select Late Payment Reason 🗸 | | | | |
| Amount Billed and Amount Certified do not match. | | | | | |
| Please enter comments: * | | | | | |
| | | | Submit Ca | incel | |
| | | | | | |

Figure 52: Provide a Reason Why the Certified Amount is less than Payment Amount

- If the Certified Amount is greater than the Payment Amount, a warning error message will display. Complete the following:
 - 1. Select the **Cancel** button. You will be prompted with a dialog box titled "Unsaved changes." Fix the amount to remove the warning error message.

NOTE: The Submit button will be disabled, so you will be unable to proceed.

| Accept | | ⊖ Refuse | |
|----------------------------|--------------------------|----------|----------|
| Date Of Acceptance \star | 2/9/2022 | | # |
| Total Certified Amount | \$2,490.00 | | _ |
| "Is this a Final Invoice?" | | | |
| Late Payment Reason * | Select Late Payment Reas | | |

Figure 53: Warning Error Message Certified Amount Cannot Be Greater Than Invoice (Payment) Amount

| Unsaved changes | × |
|--|---|
| You are about to discard your unsaved changes. | |
| OK Cancel | h |

Figure 54: Unsaved Changes Dialog Box

- 4. Determine if this is a final invoice. If this is a final invoice and no further invoices should be received from the service provider for the authorized time period, select the **Checkbox** next to "Is this a final invoice?" This prevents the vendor from sending any further invoices under the same authorization.
- **NOTE:** Authorizations can be based on various criteria (for every semester, for every fiscal year, and so on. If you select **Is this a Final Invoice** checkbox, you are saying that this is the final invoice for the semester or fiscal year or other criteria upon which the authorization was based.
 - If displayed, enter a Late Payment Reason from the dropdown menu. This displays for any invoice over 56 days.

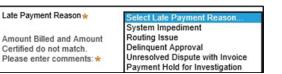


Figure 55: Late Payment Reason

- Amount Billed and Amount Certified do not match. If displayed the required comment text box is provided. Enter **comments**
- 5. Select the **Submit** button to submit the invoice.

| | 9 | | |
|---------------|---------------|------------------|--|
| | | | |
| | | | |
| | | | |
| Payment Reaso | on 🗸 | | |
| | | | |
| | | | |
| | | | |
| | Payment Reaso | Payment Reason V | |

Figure 56: Accepting an Invoice

- **NOTE:** If you selected "Is this a Final Invoice?" checkbox, upon submission a status of Final displays in the **My Authorizations Report**.
 - 6. You are asked to **verify** that you are authorized to certify this invoice. The Certification Alert displays.
- *NOTE:* If you are overriding an error or if you've selected Final Invoice, a warning displays in this authorization window.
 - 7. Select the **OK** button

| × |
|---|
| |
| |
| |
| |
| |
| |

Figure 57: Authorized to Certify

7.3.1.4. Refusing an Invoice

To refuse an invoice, complete the following steps:

- 1. From the open invoice screen, select the **Refuse** option in Provide Certification Decision section.
- 2. Select a **Reason** from the dropdown list for refusing the invoice.

| Provide Certification | Decision |
|-----------------------|---|
| ⊖ Accept | Refuse |
| Refusal Reason * | Select Refusal Reason Unauthorized Item Unauthorized Service Unauthorized Training, Outside of Approved Degree Program Items/Services outside the authorization period Items/Services do not match Veteran record Other |
| | Submit Cancel |

Figure 58: Provide Certification Decision Screen

- 3. If you select **Other** as your refusal reason, you will be prompted for required comments. **Describe your reason for refusal** in the text box.
- 4. Select the **Submit** button. The invoice is archived and a notification is sent to the vendor. It no longer displays in your Work List.

| Accept | | | Refuse | |
|----------------------|---------------------|---------|--------|--|
| Refusal Reason \star | Others | ~ | | |
| Comments: * | Enter Refusal Reaso | in | | |
| | Remaining: 256 char | racters | | |

Figure 59: Enter Other Reason in text box

7.3.2. High Dollar Invoices

Only the Supervisor, the RO Director, and the Director user roles can certify high-dollar invoices.

7.3.2.1. Opening High Dollar Invoices

To process high dollar invoices, complete the following:

1. After logging into IPPS, the Supervisor or RO Director/Director My Work tab is available. To change Stations, select your **Station** from the drop down menu. The WorkList for your Station displays.

NOTE: The RO Director and Director will not see a Pending-Certification status since they do not handle certifications.

NOTE: Certification Status for high dollar invoices shows Pending-HighValueInvoiceReview.

2. Select the Invoice you want to process. The Certification Details Screen displays.

| My Work | | | | | | | | | |
|------------------|-----------|--|-------------|-----------|------------------|--------------------------------|------|-------------------------|--------------|
| Select a Station | 1 | 01 🗸 | | | | | | | |
| DLN | PONumber | VendorName | vendorID | TotalDue | ParticipantName | StatusWork | Age | invoiceReceivedDate | VAFileNumber |
| 20796300001 | 101940141 | THE UNIVERSITY OF TEXAS | 74600020311 | 97000 | JOHN HALL | Pending-HighValueInvoiceReview | 972 | Jul 5, 2019 1:00:00 AM | 908-20-0003 |
| 00606300001 | 101040022 | BOISE STATE UNIV | 82029070108 | 239000 | TESTERA TESTER | Pending-HighValueInvoiceReview | 971 | Jul 6, 2019 1:00:00 AM | |
| 20396300003 | 101940134 | THE UNIVERSITY OF TEXAS | 74600020311 | 88890 | SILVIA SHRUBBERY | Pending-HighValueInvoiceReview | 984 | Jun 23, 2019 1:00:00 AM | 933-93-1045 |
| 19096300004 | 101940106 | THE UNIVERSITY OF TEXAS | 74600020306 | 105000 | CRSC B SIXTEEN | Pending-HighValueInvoiceReview | 985 | Jun 22, 2019 1:00:00 AM | 144-12-8888 |
| 18996300001 | 101940104 | THE UNIVERSITY OF TEXAS | 74600020304 | 100000.99 | JOHN HALL | Pending-HighValueInvoiceReview | 987 | Jun 20, 2019 1:00:00 AM | 101-10-0002 |
| 14673400038 | 101940073 | CULPEPPER & ASSOCIATES SECURITY SERVICES, INC. | 582027627 | 1000000 | CRSC B SIXTEEN | Pending-HighValueInvoiceReview | 1813 | Mar 16, 2017 1:00:00 AM | 144-12-8888 |

Figure 60: My Work Tab

High Dollar Invoices Certification Details Screen

The screen includes the following sections:

IPPS for VBA Veteran Readiness and Employment User Guide

- 1. Audit Link provides a history of the invoice (see <u>Viewing Audit Information</u>). This is hidden by default but can be seen by selecting the link.
- 2. Invoice Summary contains metadata submitted from IPPS and is collapsed by default. You can view this information by clicking on the chevrons. This includes:
 - a. Document Locator Number (DLN) Number the unique ID of every invoice in IPPS
 - b. Status of the invoice (see <u>A List of Status Conditions</u> for a list of possible statuses)
- 3. Authorization Details this area is pre-populated from the invoice and authorization.
 - a. There are also links to open the Authorization and Invoice images.
 - b. Reviewer History this area displays actions taken by previous reviewers.
- 4. Reviewer History Displays reviewed by, date, time, and action.
- 5. Invoice Line Details this area displays the items that were entered by the service provider in Tungsten, a dropdown list for their Budget Object Code (BOC), and the amount for each line item.
- 6. Provide Certification Decision this area allows you to Accept or Refuse the invoice (or return it to the reviewer for high-dollar invoices). Based on your role, and the dollar value of the invoice you will see actions described in Table 2.
- 7. Notes allow for additional notes to be filed with the invoice. See <u>Notes and</u> <u>Attachments.</u>

8. Attachments – allow for additional attachments to be filed with the invoice. See <u>Notes</u> <u>and Attachments.</u>

| oice Summary 2 DLN: 20796 | 300001 | Status 🏲 Pending-HighValu | eInvoiceReview | | | 1 |
|--|------------------|---------------------------|------------------------|--------------|--------------------|--|
| norization Details | | | | | | |
| voice is outside the Enrollment period | | | | | | |
| articipant Name JOHN HALL | Vendor Name | SAMUEL B RAMOS | Invoice Date | 03/09/2017 | | |
| articipant ID 824060 | Vendor ID | RAMOSSB | Invoice Received | 07/05/2019 | | |
| A file Number 908-20-0003 | Enrollment Start | 07/26/2019 | Date Invoice Number | A31794000214 | | |
| uthorization Number 101940141 | Enrollment End | 07/26/2019 | Payment Amount | \$97,000.00 | | |
| iew Authorization Image | | | | | | |
| iew Invoice Image | | | | | | |
| ewer History | | | | | | |
| eviewed By Date Time | Action | | | | | |
| inod 07/26/2019 11:38 AM | Accept | | | | | |
| | | | 100 | | | |
| | | | BOC | es: 4107 | | |
| Ambulance Transports | | | | | | \$58,194.72 |
| Ambulance Transports | | | Tuition and Fee | | | \$58,194.72 |
| Ambulance Transports | | | Tuition and Fee | | | \$58,194.72 |
| Ambulance Transports Ambulance Transports | | | Tuition and Fee | | | \$58,194.72 |
| Ambulance Transports Ambulance Transports | ⊖ Refuse | | Tuition and Fee | | Return to Reviewer | \$58,194.72 |
| Ambulance Transports Ambulance Transports | Refuse | | Tuition and Fee | | Return to Reviewer | Amount to Apply \$58,194.72 \$500.72 |
| Ambulance Transports Ambulance Transports |) Refuse | | Tuition and Fee | | Return to Reviewer | \$58,194.72 |
| Ambulance Transports Ambulance Transports |) Refuse | Submit | Tution and Fee | | Return to Reviewer | \$58,194.72 |
| Ambulance Transports Ambulance Transports | ⊖ Refuse | Submit | Tution and Fee | | Return to Reviewer | \$58,194.72 |

Figure 61: Enter Other Reason in text box

7.3.2.2. IPPS Role and High Dollar Invoice Certification Actions

| IPPS Role | High Dollar Invoice Certification Action | | | |
|-----------------|--|---|--|--|
| VR&E Supervisor | Recommend Accept | Based on the Amount of Tuition/Books (threshold) the supervisor can have a Recommend Accept option. | | |
| | Refuse | Archives the invoice and sends a notification to the vendor with the reason for refusal | | |
| | Return to Reviewer | The invoice is returned to the original invoice reviewer. | | |

| VR&E RO Director | Accept | You only see Accept if you are the final approver or if this is the original review when the invoice status is Pending- Certification. |
|---------------------|---------------------|--|
| | Refuse | Archives the invoice and sends a notification to the vendor with the reason for refusal |
| | Recommend Accept | If the Amount to approve is above your threshold limit, you will see the Recommend Accept option. Recommendation for approval must always be routed directly to the Director role |
| | Return to Reviewer | Return to Reviewer must always be returned to the original invoice reviewer. Invoice status is Pending-HighValueInvoiceReview. |
| VR&E Director | Accept | You only see Accept if you are the final approver or if this is the original review when the invoice status is Pending- Certification. |
| | Refuse | Archives the invoice and sends a notification to the vendor with the reason for refusal |
| | Return to Reviewer | Return to Reviewer must always be returned to the original invoice reviewer. Invoice status is Pending- HighValueInvoiceReview. |

Table 5 High Dollar Certification Actions

7.3.2.3. Processing a High Dollar Invoice

To process an invoice with a value over the threshold for a certifying official:

- The invoice must first be recommended for acceptance which sends the invoice upward in the approval chain.
- If the next certifying official does not have authority to approve the dollar amount, they recommend acceptance as well until the invoice finally ends up on the desk of the certifying official that does have authority over this amount. For the amounts each role can certify up to see <u>Table 3. IPPS High Dollar Thresholds</u>.

Recommending Accept

If this is out of the certifying official's threshold for acceptance, the "Recommend Accept" radio button displays. Complete the following steps (Supervisor and potentially the RO director) to recommend a high dollar invoice for approval:

1. From the Certification Details screen, Review the **Invoice** and ensure the Line details are correct.

NOTE: Invoice Line details are not editable for high dollar invoices

| Invoice Line Deta | ala - | | |
|-------------------|-----------------------------|------------------------|-----------------|
| Line | Description | вос | Amount to Apply |
| 1 | WESTLAW DECEMBER 2015 USAGE | Tuition and Fees: 4107 | \$10,314.48 |
| 1 | WESTLAW DECEMBER 2015 USAGE | Required Books: 4108 | \$10,314.48 |

Figure 62: Invoice Line Details section of the Certification Details Scree

- 2. From the Provide Certification Decision section, select **Recommend Accept**. Certification Information displays
- 3. Review the information displayed, and if there are no changes select the **Submit** button.

| Recommend Accept | | ⊖ Refuse | | Return to Reviewer |
|---|-------------------|----------|--------|--------------------|
| Date Of Acceptance | 01/01/0001 | | | |
| Total Certified Amount "Is this a Final Invoice?" | \$20,628.96 No | | | |
| Amount Billed and Amount Certified do not match. Please enter comments: | qwee | | | |
| | | | Submit | |

Figure 63: Provide Certification Decision Section of the Certification Details Screen

NOTE: If changes are required, see <u>7.3.2.5 Return to Reviewer</u>.

The system processes the invoice and routes it to next higher role in the system. The invoice no longer displays in your Work List. It is listed as "Pending-HighValueInvoiceReview" in the Work List of the approver.

Accepting the Invoice

Every invoice is in Pending-Certification or Pending-HighValueInvoiceReview status. To accept a high Dollar invoice, complete the following:

- 1. If the invoice is in Pending-Certification status, it is editable.
- 2. If the invoice is in Pending-HighValueInvoiceReview status, it is read only.
- 3. If the fields are editable, select from the drop down menu a **list of possible entries for BOC**.
- 4. Next, update the **amount to apply** into the Amount to Apply field.
- 5. You can also delete a line item by selecting the **trashcan** to the right of the Amount to Apply field.

| Line | Description | Select one Tuition and Fees: 4107 Required Books: 4108 | Amount to Apply |
|------|--------------------|--|---------------------------|
| 1 | CLIN1004 AZ Travel | Required Supplies: 4109 | 20132.74 |
| 2 | CLIN1008 TN Travel | Required Handling Charges i Required Tutorial: 4113 Required Equipment: 4150 | nis invoice line 11465.66 |
| 3 | CLIN1013 GA Travel | Required One-Time Miscellaneous: 4155 | 26602.47 |
| 1 | CLIN1004 AZ Travel | Select one V | 20132.74 |
| 2 | CLIN1008 TN Travel | Select one V | 11465.66 |
| 3 | CLIN1013 GA Travel | Select one | 26602.47 |

Figure 64: Budget Object Code and Amount Entry section of the Certification Details Screen

- 6. Select Accept option in Provide Certification Decision section.
- 7. Enter the **Date of Acceptance** (It is a required field denoted by an orange asterisk.). This field auto populates with the current date, but you can also enter the date in mm/dd/yyyy format or use the Calendar to select dates (see <u>7.1.3.1 Using the Calendar Tool</u>).
- 8. Verify the **Total Certified Amount**.
- 9. If this is a final invoice and no further processing will be done, select the **Checkbox** next to "Is this a Final Invoice." This prevents the vendor from sending another invoice under the same authorization.

NOTE: Authorizations can be based on various criteria (for every semester, for every fiscal year, and so on. If you select final, you are saying that this is the final invoice for the semester or fiscal year or other criteria upon which the authorization was based.

10. Select the **Submit** Button. After submission, a status of Final shows when My Authorizations is selected

| Provide Certification | Decision | | |
|--------------------------|-------------|----------|---------------|
| Accept | | ◯ Refuse | |
| Date Of Acceptance * | 8/19/2019 | 1 | |
| Total Certified Amount | \$97,223.00 | | |
| Is this a Final Invoice? | | | |
| | | 9 | Submit Cancel |
| | | | |

Figure 65: Accepting an Invoice section of the Certification Detail Screen

| | * | * | |
|---------------|--------|--------|----------------|
| Facility Code | Status | | |
| 12312312 | Open | Cancel | View PDF Image |
| 12345678 | Open | Cancel | View PDF Image |
| 12345678 | Final | | View PDF Image |
| 12345678 | Cancel | | View PDF Image |

Figure 66: Status of Final shows when My Authorizations is selected

Late Payment Reason

If Late Payment Reason occurs, since the Amount Billed and Amount Certified do not match, complete the following:

- 1. Select a Late Payment Reason from the dropdown menu.
- 2. If displayed, enter **required notes** in Amount Billed and Amount Certified do not match field.
- 3. Select the **Submit** button. The Certification Alert dialog box displays.

| Late Payment Reason * | Select Late Payment Reason |
|--------------------------|---------------------------------|
| | System Impediment |
| Amount Billed and Amount | Routing Issue |
| Certified do not match. | Delinquent Approval |
| Please enter comments: * | Unresolved Dispute with Invoice |
| | Payment Hold for Investigation |

Figure 67: Late Payment Reason dropdown menu

| Accept | ◯ Refuse | |
|---|-----------------------------------|--|
| Date Of Acceptance * | 6/2/2019 | |
| Total Certified Amount | \$5,754.70 | |
| Is this a Final Invoice? | | |
| Late Payment Reason * | System Impediment | |
| Amount Billed and Amount Certified do not match. Please enter comments: * | There was a pre-payment of \$500. | |

Figure 68: Required Fields Entered

NOTE: If you are overriding an error or if you've selected Final Invoice, a warning displays in this authorization window. You are asked to verify that you are authorized to certify this invoice. Select the **OK** button.

| Certification Alert | × |
|---|---|
| I am authorized to certify this invoice | |
| Warnings: | |
| Certified amount does not match the invoice (payment) amount | |
| You have selected Final invoice, are you sure to close out the authorization? | |
| OK Cancel | |

Figure 69: Authorized to Certify

The system processes the certification and the invoice no longer displays in your Work List.

7.3.2.4. Refusing the Invoice

To refuse a high dollar invoice, complete the following steps:

- 1. From the Certification Details screen, select the Provide Certification Decision screen.
- 2. Select the **Refuse** option.
- 3. If you select **Other from** the drop down menu, you are asked to enter further information in the Reasons text field.

|) Accept | Refuse | |
|----------------------------|--|------|
| efusal Reason * | Select Refusal Reason | |
| | Select Refusal Reason Select Refusal Reason | |
| | Unauthorized Service | |
| | Unauthorized Training, Outside of Approved Degree Program | ncel |
| | Items/Services outside the authorization period Items/Services do not match Veteran record | |
| | Duplicate | |
| | Missing Itemized Invoice | |

Figure 70: Provide Certification Other Decision Screen

4. Click Submit.

The invoice is archived, and a notification is sent to the service provider. It no longer displays in your Work List.

7.3.2.5. Return to Reviewer

If the next level approver feels the invoice needs to be adjusted, complete the following:

- 1. From the Certification Details screen in the Provide Certification Decision section, select the **Return to Reviewer** checkbox. A Return to Reviewer text field displays the message "Enter comments for returning this invoice to the reviewer."
- 2. Enter your **comments** into the text field.
- 3. Select the **Submit** button. The system processes the invoice and routes it to the original reviewer. It no longer displays in your Work List.

| Provide Certification Decision | | |
|--------------------------------|---------------|--|
| Recommend Accept | ⊖ Refuse | Return to Reviewer Enter comments for returning this invoice to the reviewer |
| | | |
| | | |
| | Submit Cancel | |
| | | |

Figure 71: Return to Reviewer

7.3.3. Notes and Attachments

At the bottom of the Certification details screen are the Notes and Attachments sections. For notes complete the following:

- 1. Enter your **Notes** into the text box.
- 2. Select the Add button to add the note. Notes are added to the invoice.

| Notes | | |
|--------------------------------------|---|-------|
| Notes Place notes here | | |
| Place notes here | I | C Add |
| No attachments | | |
| ivo attacimienta | | |
| | | |
| Attachments | | |
| | | |
| Attachments Show Subcase Attachments | | |
| No attachments | | |
| | | |
| UploadFile | | |
| File Name Description | | |
| No items | | |

Figure 72: Notes and Attachment section of the Certification Details screen

| D Notes | | |
|------------|--|----------|
| Notes | |) 🖝 Add |
| | | ädvanced |
| \bigcirc | - Payment not required less than a minute ago | |
| 8 | less than a minute ago | |
| | | |

Figure 73: Notes are added to the invoice

Advanced Notes

To add a subject to your notes, complete the following steps:

1. Select the **Advanced...** link located under the Add button.

| 2 Notes | | |
|---------|---|----------|
| Notes | | |
| | 0 | + Add |
| | | Advanced |

Figure 74: Select Advanced Link to add a subject to your note

- 2. Enter a **subject** for the note in the Subject field and contents of the **note** in the Note field.
- 3. Select the **OK** button.

| Add Note | × |
|-----------|--------|
| Subject 🎪 | |
| Note | ^ |
| Note * | \sim |
| ο | Cancel |
| | 1. |

Figure 75: Add a Note screen

The note is added to the invoice.

| Notes | | | |
|-------|--|---|-----------|
| Notes | | 0 | + Add |
| | - Payment not required less than a minute ago | | CMCM/MARK |

Figure 76: Note added to invoice

7.3.3.1. Adding Attachments to an Invoice

This section allows you to upload documents. To upload a document:

- 1. From the Certification Details screen, select the Attachments section.
- 2. Select the file that you want to upload (a required field) by selecting the **Upload** button to select it.
- 3. Enter a **description** for the file.
- 4. Select the **OK** button. The file is uploaded and saved to the invoice.

| Attachments | | | |
|----------------------------------|---------------|--|---|
| Attachments False Show Subcas | e Attachments | | |
| No attachments | | | |
| Upload file | | | |
| File Name | Description | | _ |
| No items | | | |

Figure 77: Attachments Section

7.4. Viewing Audit Information

To view audit information, complete the following:

1. From the top right corner of the Certification details screen, select the **Audit** link. The audit details view displays. This screen shows a detailed outline of when the action was taken, what action was taken, and who took the action.

| Invoice Summary | DLN: 20816300002 | Status 🏴 Pending-Certification | ⊕_ <u>Audt</u> ^ |
|--------------------|------------------|--------------------------------|------------------|
| | | | |

Figure 78: Audit Link

| | Case Narrative | | | | |
|---|---------------------------|---|--------------------|--|--------|
| Case Status P | ending-Certification Ur | gency 30 ID I-195828 | | | + |
| Subject | Invoice | | | | |
| Ipdated | 7/1/19 12:36 PM | by Sabbir Chowdhury | Aging since | | |
| Created | 6/26/19 12:23 PM | by Sabbir Chowdhury | Urgency adjustment | 30 | |
| History | | | | | |
| Report that pop | ulates the audit trail of | a case | | Export to E | xcel |
| | | | | Displaying 8 | ecords |
| Time 🔺 | ▼ Description | | | | |
| 6/26/2019 12:23 P | M Item created. | | | Sabbir Chowdhur | 1 |
| 6/26/2019 12:23 P | M Status changed to | New-Invoice. | | Sabbir Chowdhur | 1 |
| 6/26/2019 12:23 P | | Pending-Certification. | | Sabbir Chowdhur | 1 |
| 6/26/2019 12:23 P | M Invoice successful | y submitted to ODS. | | Sabbir Chowdhur | 1 |
| 6/26/2019 12:23 P | | cationWB to ' complete task '. | | Sabbir Chowdhur | |
| 6/26/2019 12:24 P | | y submitted to ODS. | | Sabbir Chowdhur | |
| 6/29/2019 12:24 P 7/1/2019 12:36 PM | | for assignment to ' complete task hed for assignment to ' complete | | Service Level Age Service Level Age | |
| Attachments | | | | | _ |
| Attachments | | | | | |
| Attachments | Attachments | | | | |
| Attachments Attachments Show Subcase / No attachments | Attachments | | | | |
| Attachments] Show Subcase / | Attachments | | | | |
| Attachments Show Subcase / No attachments | Attachments | | | | |
| Attachments Show Subcase / No attachments Upload file | | | | | |

Figure 79: Audit Details View

Attachments Section

Complete the following:

1. To view attachments or upload files, select the **vertical double chevron** located next to attachments to expand the listing. From this section you can add, view, or delete attachments.

- 2. To view Subcase Attachments, select the Show Subcase Attachments checkbox.
- 3. To upload an attachment, select the **Upload file** button.
- 4. Select the **Submit** button to add the attachment.
- 5. Select the **Close** button to Close Audit Details/Case Narrative section.

| Attachments | | |
|----------------|-------------|-------|
| Attachments | Attachments | |
| No attachments | | |
| | | |
| Upload file | | |
| File Name | Description | |
| No items | | |
| | | |
| | | Close |

Figure 80: Attachments section

7.5. Viewing Case Narrative

To see comments left by the Certifying Official complete the following:

1. Select the Case Narrative tab

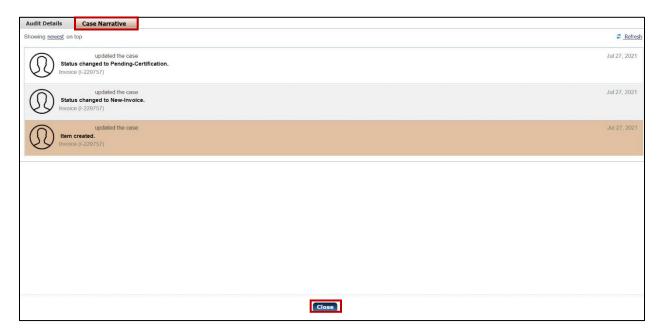


Figure 81: Case Narrative Tab

2. When finished viewing the Case Narrative tab, at the bottom of the Attachments section select the **Close button**.

7.6. Credit Memo

A credit offset is money owed to the Veterans Administration (VA) by vendors. The credit memo is a vendor-issued credit memo.

Processing a Credit Memo is similar to certifying an invoice; however, there are two differences:

- 1. A notification message titled "Credit Memo Received" in red bold lettered font will display in authorization details.
- 2. There will not be a Final Invoice option displayed.

| Invoice Summary | DLN: 014263000 | 102 | Status 🏴 Pending-Certifica | ation | | | € <u>Audit</u> | |
|--|---|------------------|----------------------------|--------------------------|--------------------|----|----------------|--|
| thorization Details | | | | | | | | |
| Invoice is outside the Enro | ollment period | | | | | | | |
| Participant Name TES | TERA TESTER | Vendor Name | | Invoice Date | 03/09/2017 | | | |
| Participant ID 41 | | Vendor ID | | Invoice Received Date | 06/08/2021 | | | |
| VA file Number | | Enrollment Start | 09/17/2021 | Invoice Number | TESTVRECREDITMEMO2 | | | |
| Authorization Number | | Enrollment End | 09/17/2021 | Payment Amount | -\$28.00 | | | |
| | | | | | | | | |
| View Authorization Image View Invoice Image | | Credit Me | mo Received | | | | | |
| woice Line Details | | | | | | | | |
| Line Descript | ion | | | BOC | | Am | ount to Apply | |
| | | | | Select one | ~ | | | |
| 1 SUPPORT | IVE HOUSING | | | | | | 132862.44 | |
| 0 | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| ovide Certification Decision | | | | | | | | |
| | | | | | | | | |
| Accept | | 0 | Refuse | | | | | |
| Accept | | 0 | | it Cancel | | | | |
| | | 0 | | t Cancel | | | | |
| cept | | 0 | | t Cancel | | | | |
| ide Certification Decision | | | | t Cancel | | | | |
| cept le Centration Decision) Accept | | | Submi | t) Cancel | | | | |
| cept or Confliction Decision Accept 3D Email * | | | Submi | | | | | |
| cept de Caffation Decision) Accept 3D Email * te Of Acceptance * | 2/8/2022 | | Submi | B Cancel | | | | |
| Accept ccept ccept ccept contraction Decision contraction Decision contraction contetion contraction contraction contraction contraction contrac | [[2/8/2022 -\$28.00 | | Submi | | | | | |
| cept de Caffation Decision) Accept 3D Email * te Of Acceptance * | Land the second s | | Submi | | | | | |
| cept de Catification Decision) Accept ID Email * the Of Acceptance * tal Certified Amount | Land the second s | | Submi | | | | | |
| cept (contriction Decision) Accept SD Email * tate Of Acceptance * tata Certified Amount fuse | Land the second s | | Submi | | | | | |
| cept cecoffication Decision cecoffication Decision SD Email * tabe Of Acceptance * tal Certified Amount fuse severe confication Decision | Land the second s | | Submi | | | | | |
| cept cecoffication Decision cecoffication Decision SD Email * tabe Of Acceptance * tal Certified Amount fuse severe confication Decision | Land the second s | | Submi | | | | | |
| cept centration Decision Accept Comparison Compari | -\$28.00 | | Submi | | | | | |
| cept de Catification Decision) Accept SD Email * the Of Acceptance * tal Certified Amount fuse fuse www.contrastee Decision | Land the second s | | Submi | | | | | |
| cept de Confliction Decision) Accept 3D Email * ate Of Acceptance * tal Certified Amount fuse fuse wee confliction Decision Accept | -\$28.00 | | Submi | | | | | |
| ept contrication Decision Accept D Email * a Of Acceptance * al Certified Amount USE USE USE | -\$28.00 | | Submi | ubmit Cancel | | | | |

Figure 82: Credit Memo Details Screen without Notes and Attachments Section

NOTE: For details on the Notes and Attachment sections, see <u>Notes and Attachments</u>.

NOTE: For detailed information about the entire Credit Memo Screen refer to <u>Sections of the</u> <u>Certification Details Screen</u>.

7.6.1. Accept or Refuse the Credit Memo

From the Provide Certification Section either **Accept** or **Refuse** the Credit Memo. Complete the following:

1. Accept: Select the Accept option.

Depending on the condition of the invoice, additional fields may display. If it's late or if amounts mismatch and so on, you are asked to provide further information. At a minimum, you are asked for the Date of Acceptance.

| Provide Certification Decision | |
|--------------------------------|---------------|
| Accept | ⊖ Refuse |
| | |
| | |
| | Submit Cancel |
| | |

Figure 83: Certification Decision Screen

- 2. Enter the following required fields denoted by an asterisk:
 - a. **Date of Acceptance**: This field auto populates with the current date, but you can also enter the date in **mm/dd/yyyy** format or use the **Calendar icon** to select dates.

| Provide Certification Decision | | | |
|--------------------------------|----------|----------|----------|
| Accept | | O Refuse | |
| | | | |
| Date Of Acceptance * | 2/9/2022 | | m |

Figure 84: Date of Acceptance Auto Populates or can be Selected

| b. | Enter the Support | Services Divi | ision (SSD) | Email |
|----|-------------------|---------------|-------------|-------|

| vite Cartification Decision | |
|-----------------------------|----------|
| Accept | O Refuse |
| SSD Email # | |

Figure 85: Enter SSD Email

- c. You must verify the **Total Certified Amount** when accepting the invoice. Refer to <u>7.3.1.3</u> <u>Section Accepting an Invoice</u> for detailed instruction.
- 3. Refuse: Select the **Refuse** option.
 - If the Refusal Reason drop down menu displays, select the **Reason**.
 - If you select **Other** as the Refusal Reason, a Comments text box will display. Enter your **required comments**.

NOTE: If you refuse the certification, an email is sent to the vendor.

4. Select the **Submit** button to submit the invoice.

| | Status 🏴 Pending-Ce | ertification | | € <u>Audt</u> |
|---|-----------------------------|---------------------------------------|-----|-----------------|
| Authorization Details | | | | |
| Invoice is outside the Enrollment period | | | | |
| Participant Name TESTERA TESTER | Vendor Name | Invoice Date 03/09/2017 | | |
| Participant ID 41 | Vendor ID | Invoice Received 06/08/2021 Date | | |
| VA file Number | Enrollment Start 09/17/2021 | Invoice Number TESTVRECREDITME | MO2 | |
| Authorization Number | Enrollment End 09/17/2021 | Payment Amount -\$28.00 | | |
| View Authorization Image View Invoice Image | Credit Memo Received | i i i i i i i i i i i i i i i i i i i | | |
| Availab Line Details | | | | |
| Line Description | | вос | | Amount to Apply |
| | | Select one | ~ | |
| 1 SUPPORTIVE HOUSING | | | | 132882.44 |
| Accept | 🔿 Refuse | | | |
| | | | | |
| | Su | abmit Cancel | | |
| fuse | | abmit Cancel | | |
| | 6 | abmit Cancel | | |
| ovde Cettfication Decision | © Refuse | abmit Cancel | | |
| over Cartification Decision | Refuse | abmit Cancel | | |
| fuse were Certification Demoke Accept Refusal Reason * Duplicate G | | abmit Cancel | | |
| wele Cetification Decision | Refuse | abmit Cancel | | |

Figure 86: Select Refusal Reason Credit Memo

|) Accept | | Refuse | |
|------------------|---------------------------|--------|--|
| Refusal Reason ★ | Others v | | |
| Comments: ★ | Enter Refusal Reason | | |
| | Remaining: 256 characters | | |

Figure 87: Select Refusal Reason Others includes required Comments

NOTE: Credit Memo is for information only. IPPS does not do any further processing

| | Department of Veterans Affairs Financial Services Center PO BOX 149971 Austin TX 78714-9970 | |
|--|--|-------------------|
| | | Date: Feb 8, 2022 |
| Vendor Na | tion Number : 101140036 ame : DOE FUND INC imber : TESTVRECREDITMEMO2 | |
| Dear SSD, | | |
| Please process credit | memo 101140036. tion is needed, contact the assigned VRC. | |
| Regards, Department of Veter Financial Service Cen | | |
| This is a system gene | rated email and any replies addressed to this email will not be processed. | |

Figure 88: Email Sent to SSD When Credit Memo Refused

7.7. Site Administration

This section discusses the following features available to the Site Administrator.

- My Work
- Dashboard
- Process Work:
 - User Admin
 - Invoice Inquiry System
 - <u>Station Authorizations</u>
 - iFAMS Station Inquiry System Note: For VR&E NC users only
- Monitor Activity

| 4 | My Work | | | | | | | | | | | ۲ |
|--|--|---|---|---|---|--|--|--|---|--|---|-------|
| > Dashboard | | | | | | | | | | | | |
| Y Process Work | Select a Station | 101 🗸 | | | | | | | | | | |
| | | | | | | | | | | | | |
| | WorkDat | | | | | | | | | | | |
| User Administration | | | | | | | | | | | E | xport |
| | Document Locator Number | * Auth Number | ▼ VendorName | * VendoriD | - Amount - | Participant Name | * Certification Status | - Age | * Received Date | Original CM Name | * VA File Number | - |
| Invoice Inquiry System Station Authorizations iFAMS Station Inquiry System | 2240530001 2240530001 2319530001 2319530001 2319530001 2319530001 2319530001 2225530001 1225530001 1225530001 1225530001 1225530001 1225530001 1225530001 1225530001 1225530001 1225530001 1225530001 1255300001 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 125500000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 1255300000 12553000000 12553000000 1255300000000000000000000000000000000000 | 101140006 101140008 101940176 101940176 101940176 101940176 101940176 101940036 101940036 101940036 101940036 101940036 101940056 101140005 101140005 101140005 101940032 101040032 101040032 | OSMAN NOURELHUDA VIETTE I PAULER INC FFE UNIVERSITY OF TEXAS Int UNIVERSITY OF TEXAS SOV CONSTRUCTION DECLE UNIVERSITY DREAL UNIVERSITY | 001020920 000588672 473541625 74600020311 74600020311 74600020312 74600020302 7460020302 7460020302 7460020302 7460020302 7450020000000000000000000000000000000000 | 99.000.00 5,760.00 5,760.00 5,760.00 5,760.00 5,760.00 | TESTERA TESTER TESTERA TESTER RONNY JON HILLY BAZDOKA BUBBLE GUM BAZDOKA BUBBLE GUM HESTERA HER TESTERA TESTER TESTERA TESTER | Pending-Unassigned | 493 493 829 954 954 978 994 994 994 994 1176 1820 493 493 769 770 770 770 770 770 | 11/2/2020 11/2/2020 12/2/2019 7/30/2019 7/30/2019 7/30/2019 7/30/2019 7/30/2019 7/30/2019 6/20/2019 12/20/2018 12/20/2018 11/2/2020 11/2/2020 11/2/2020 11/30/2020 11/30/2020 11/30/2020 11/30/2020 | vafacsýválstatříčý va pov vafacsýválstatříčý va pov vafacsýválstatříčý va pov vafacsýválstatříčý va pov binod kumatýva gov binod kumatýva gov binod kumatýva gov Joy Ovenějíva pov Joy Ovenějíva pov Joy Ovenějíva pov Joy Ovenějíva pov vafacsýválstatříčýva pov vafacsýválstatříčýva pov vafacsýválstatříčýva pov vafacsýválstatříčýva pov vafacsýválstatříčýva pov vafacsýválstatříčýva pov vafacsýválstatříčýva pov | \$20.18-0013 \$20-10-0013 \$23-32-323 \$23-32-323 \$23-19-1041 101-10-0002 | · |
| > Monitor Activity | | | | | | | | | | | | |

Figure 89: Site Administration Initial Screen

7.7.1. My Work

The Site Administration My Work tab provides information on invoices that require administrative action. The Site Administrator does not have security permissions to open the invoices, but they can reassign unassigned invoices on the My Work tab.

After logging into IPPS as a Site Administrator, the Site Administrator screen displays with the unassigned invoices listed in the My Work tab for the station they are associated with.

Complete the following:

- 1. If you are associated with other stations, select the **appropriate station(s)** from the drop down menu.
- 2. To Export select the **Export** button.

| Select a Station | 101 🗸 | | | | | | | | |
|---|---|--------------------------------|---|---|---|--|---|---|-------------------------------|
| WorkList | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | Export |
| | | | | | | | | | |
| Document Locator Numb | er Auth Number | VendorName | ▼ VendorID ▼ Am | nount Particip | ant Name | Certification Statu | is Age | Received Date Original CM Nan | me 🔻 VA File Number |
| 14983400039 | 101940065 | ▼ VendorName | 00 | 0,000.00 JOHN H | ALL | Pending-Unassigned | 1796 | 3/16/2017 | VA File Number 101-10-0002 |
| 14983400039 03406300020 | 101940065 101040032 | ▼ VendorName | 00 81 | 0.000.00 JOHN H | ALL A TESTER | Pending-Unassigned Pending-Unassigned | d 1796 d 745 | 3/16/2017 1/31/2020 | |
| 14983400039 03406300020 03406300001 | 101940065 101040032 101040032 | ▼ VendorName | 00 81 81 | 0,000.00 JOHN H | ALL A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned | d 1796 d 745 d 753 | 3/16/2017 1/31/2020 1/23/2020 | |
| 14983400039 03406300020 03406300001 03406300002 | 101940065 101040032 101040032 101040032 | ▼ VendorName | 00 81 81 81 81 | 0,000.00 JOHN H 1.25 TESTER 1.25 TESTER 1.25 TESTER | ALL A TESTER A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned | d 1796 d 745 d 753 d 753 d 753 | 3/16/2017 1/31/2020 1/23/2020 1/23/2020 | |
| 14983400039 03406300020 0340630001 03406300001 03406300002 03406300003 | 101940065 101040032 101040032 101040032 101040032 | VendorName | 00 81 81 81 81 81 | 0,000.00 JOHN H 25 TESTER 25 TESTER 25 TESTER 25 TESTER 25 TESTER | ALL A TESTER A TESTER A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned | 1 1796 745 753 753 753 753 | 3/16/2017 1/31/2020 1/23/2020 1/23/2020 1/23/2020 | |
| 14983400039 03406300020 03406300001 03406300002 03406300003 18296300006 | 101940065 101040032 101040032 101040032 101040032 101040032 101940036 | VendorName | 00 81 81 81 81 ,76 | 0,000.00 JOHN H 1.25 TESTER 1.25 TESTER 1.25 TESTER 1.25 TESTER 1.25 TESTER 60.00 TESTER | ALL A TESTER A TESTER A TESTER A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned | 1 1796 745 753 753 753 753 753 970 | 3/16/2017 1/31/2020 1/23/2020 1/23/2020 1/23/2020 6/20/2019 | |
| 14983400039 03406300020 03406300001 03406300002 03406300003 18296300006 18296300005 | 101940065 101040032 101040032 101040032 101040032 101940036 101940036 | VendorName | 00 81 81 81 76 .76 | 0,000.00 JOHN H/ 1.25 TESTER 1.25 TESTER 1.25 TESTER 1.25 TESTER 60.00 TESTER 60.00 TESTER | ALL A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned | 1 1796 745 753 753 753 753 753 753 970 970 | 3/16/2017 1/3/1/2020 1/23/2020 1/23/2020 1/23/2020 6/20/2019 6/20/2019 | |
| 14983400039 03406300020 03406300001 03406300002 03406300002 03406300003 18296300005 18296300005 | 101940065 101040032 101040032 101040032 101040032 101940036 101940036 | VendorName | 00 81 81 81 81 76 76 | 0,000.00 JOHN H. .25 TESTER .25 TESTER .25 TESTER 60.00 TESTER 60.00 TESTER 60.00 TESTER | ALL A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned | 1 1796 1 745 1 753 1 753 1 753 1 753 1 753 1 970 1 970 1 970 | 3/16/2017 1/31/2020 1/23/2020 1/23/2020 1/23/2020 6/20/2019 6/20/2019 6/20/2019 | |
| 14983400039 03406300020 03406300001 03406300002 03406300003 18296300005 18296300005 18296300002 18296300002 | 101940065 101040032 101040032 101040032 101040032 101940036 101940036 101940036 101940036 | VendorName | 00 81 81 81 ,76 ,76 ,76 ,76 | 0,000.00 JOHN H. 1.25 TESTER 1.25 TESTER 1.25 TESTER 1.25 TESTER 1.25 TESTER 1.20 TESTER 1.20 TESTER 1.20 TESTER 1.20 TESTER 1.20 TESTER 1.20 TESTER | ALL A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned | 1 1796 1 745 1 753 1 753 1 753 1 753 1 753 1 970 1 970 1 970 1 970 1 970 | 3/16/2017 1/31/2020 1/23/2020 1/23/2020 1/23/2020 6/20/2019 6/20/2019 6/20/2019 6/20/2019 | 101-10-0002 |
| 14983400039 03406300020 03406300001 03406300002 03406300002 03406300003 18296300005 18296300005 | 101940065 101040032 101040032 101040032 101040032 101940036 101940036 | vendorName | 00 81 81 .76 .77 .77 .76 .77 | 0,000.00 JOHN H 1.25 TESTER 1.25 TESTER 1.25 TESTER 60.00 TESTER 60.00 TESTER 60.00 TESTER 60.00 TESTER 223.00 BAZOOH | ALL A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER A TESTER | Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned Pending-Unassigned | 1796 745 753 753 753 753 970 970 970 970 970 970 970 970 970 970 | 3/16/2017 1/31/2020 1/23/2020 1/23/2020 1/23/2020 6/20/2019 6/20/2019 6/20/2019 | |

Figure 90: Site Administrator My Work Tab with Unassigned Invoices

NOTE: Vendor Name, Vendor ID, and Original CM Name are not shown in the figure above due to security requirements.

7.7.2. User Administration

User Administration is only available for the Site Administrator role. In this role, you can:

- Add a new user
- Assign or Change a Role
- Add an Authorization
- Remove a User
- Reactivate a User
- Delete User-Assigned Authorizations
- Reassign an Authorization Number

To get to the User Management screen complete the following:

1. Select User Administration from the left navigation pane under Process Work. The IPPS User Administration displays.

| L |
|----------------------------------|
| > Dashboard |
| Process Work |
| |
| User Administration |
| Invoice Inquiry System |
| Contractions, and and contract |
| |
| Station Authorizations |
| |
| iFAMS Station Inquiry System |
| |
| |
| |
| |
| |
| > Monitor Activity |

Figure 91: Select User Administration button

| My Work IP | PS User Adm× | | | |
|--------------------|------------------------------|---------------|---------------------|----------|
| If you have access | s to multiple Stations, Sele | ect to Change | | |
| Select a Station | 101 🗸 | | | |
| New User | | | | |
| | | | | |
| FirstName | LastName | UserID | Role | |
| Jeremy | XXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 童 |
| Brenda | XXXXXXXXXXXXXXX | XXXXXX | IPPS:VRECaseManager | 鱼 |
| Carl | ****** | XXXXXXX | ****** | 鱼 |
| Eduard | XXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 血 |
| Shelly | XXXXXXXXXXXXXXX | XXXXXX | IPPS:VRECaseManager | 血 |

Figure 92: IPPS User Administration Screen

7.7.2.1. Add a New User

To add a new user from the IPPS User Administration screen, complete the following:

- 1. If you have access to multiple stations, select the appropriate **station** for the new user from the drop down menu.
- 2. Select New User button. The User Details window displays.

| My Work | IPPS User Adm | | | |
|---------------|--------------------------------|-----------------|---------------------|---|
| lf you have a | access to multiple Stations, S | elect to Change | | |
| Select a Stat | ion 101 🗸 |] | | |
| New Use | | | | |
| Hew Ost | | | | |
| FirstName | e LastName | UserID | Role | |
| | | | | |
| Jeremy | | | IPPS:VRECaseManager | 量 |

Figure 93: Add a New User

3. To search for the user, enter the user's VA email address in the Email Address field.

NOTE: If a user already exists in the system, a notification displays.

4. Select the **Search User** button. Data is retrieved from the VA's global address listing (GAL). This populates the Selected User Details section with the user's name and user ID fields. In addition, if there are any authorizations assigned to the user they will display.

| User Details | | |
|--|------------|--|
| Search For User | | |
| Search For User Email Address: * A Value cannot be blank | | |
| Value cannot be blank | | |
| Search User | | |
| Selected User Details | | |
| | | |
| User ID: | | |
| User ID: First Name: Assign a Role Select | Last Name: | |
| Assign a Role | | |
| Select 🗸 | | |
| | | |
| Submit Cancel | | |

Figure 94: Users Details Window and Search for User

- 5. Confirm the **user's details** are correct.
- 6. Select **Submit**. The user is added to the IPPS User Admin screen.

| User Details | |
|-----------------------|-------------------|
| Search For User | |
| Email Address: \star | |
| Search User | |
| Selected User Details | |
| User ID: | |
| First Name: | Last Name: |
| Assign a Role | |
| IPPS:VRECaseManag 🗸 | |
| Station Authorization | Number (Ontional) |
| | |
| No items | |
| ÷ | |
| | |
| Submit Cancel | |

Figure 95: User Information and Authorizations (Listed if assigned to user.)

7.7.2.2. Assign or Change a Role

Users can only have one role even if assigned to two different stations. If you are changing the role of the user, the station number carries over to the new role. Complete the following to assign or change a role:

NOTE: If a user has transferred from a different VA station, they must be deleted from their previous station and added by their new site admin to their correct User ID.

- 1. To search for the user, select the **user** if listed from the IPPS User Administration screen. Complete the following:
 - a. From the Selected User Details section, select the **assigned role** from the Assign a Role drop down menu.
 - b. Select the **Submit** button.
- 2. To search for a user not listed in the IPPS User Administration screen complete the following:
 - a. From the IPPS User Administration screen, select the Users assigned **Station** from the Select a Station drop down menu.

- b. Select the New User Button.
- c. Enter the user's VA email address in the Email Address field.
- d. Select the **Search User** button.
- e. From the Selected User Details section, select the **assigned role** from the Assign a Role drop down menu.
- f. Select the **Submit** button to complete the entry.

| User Details | |
|-----------------------|-------------------|
| Search For User | |
| Email Address: * | |
| | |
| Search User | |
| | |
| Selected User Details | |
| User ID: | |
| First Name: | Last Name: |
| Assign a Role | |
| | |
| | |
| Station Authorization | Number (Optional) |
| No items | |
| Đ | |
| | |
| | |
| Submit Cancel | |

Figure 96: Select the Assign a Role Drop Down Menu

7.7.2.3. Add an Authorization

To add an authorization, complete the following steps:

NOTE: Authorization Number is an optional field unless you are reassigning an authorization to a user.

- 1. To search for user from the IPPS User Admin screen if listed, select the user by double pressing their **name** via a mouse or touch pad. The User Details screen displays.
 - a. From the bottom of the User Details screen below the Station column select the **circled plus** sign. A new line displays at the bottom of the screen.

- b. Select the Station Number from the Station Number drop down menu.
- c. Enter the Authorization Number into the empty text field to the right of the station number.
- d. Select the **Submit** button.
- 2. To search for a user not listed in the IPPS User Admin screen complete the following:
 - a. From the IPPS User Admin screen, select the Users assigned **Station** from the Select a Station drop down menu.
 - b. Select the New User Button.
 - c. Enter the user's VA email address in the Email Address field.
 - d. From the Selected User Details section, select the **assigned role** from the Assign a Role drop down menu.
 - e. From the bottom of the User Details screen below the Station column select the **circled plus** sign. A new line displays at the bottom of the screen.
 - f. Select the **Station Number** from the Station Number drop down menu.
 - g. Enter the Authorization Number into the empty text field to the right of the station number.
 - h. Select the **Submit** button to complete the entry.

NOTE: Authorization number is read only for the roles of VR&E Director, VR&E RO Director, and for corresponding 508 roles.

NOTE: If this is a new user, select the station and leave the Authorization Number to the defaulted value. The only exceptions to this are: a) if you are a VR&E Director, VR&E RO Director, and for corresponding 508 roles, you must enter an Authorization Number and b) if the user doesn't have any authorizations assigned yet, one must be assigned.

| User Details | |
|-------------------------|-------------------|
| Search For User | |
| Email Address: * | |
| | |
| Search User | |
| Selected User Details | |
| User | |
| ID: | |
| First Name: | Last Name: |
| Assign a Role | |
| | |
| IPPS:VRECaseManag 🗸 | |
| | |
| | |
| Station Authorization N | Number (Optional) |
| A1 - 11 | |
| No items | |
| | |
| () | |
| | |
| | |
| Submit Cancel | |

Figure 97: Adding an Authorization



7.7.2.4. Remove a User

If a user has transferred from a different VA station, they must be deleted from their previous station and added by their new site admin to their correct User ID. To remove a user from list within the IPPS User Admin screen complete the following:

- 1. From the IPS User Administration screen, select the **Trashcan** icon next to the user you want to remove. A confirmation dialog box displays with the message "Do you want to continue?"
- 2. Select the **Yes** button.

| My Work IP | ly Work IPPS User Adm X | | | | | | |
|--|--|---------|---------------------|----------|--|--|--|
| f you have access to multiple Stations, Select to Change | | | | | | | |
| Select a Station | 101 🗸 | | | | | | |
| New User | | | | | | | |
| FirstName | LastName | UserID | Role | | | | |
| riistivallie | Lastivanie | USETID | KUIE | | | | |
| Jeremy | XXXXXXXXXXXXXXXXXX | XXXXXX | IPPS:VRECaseManager | 鱼 | | | |
| Brenda | XXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 山 | | | |
| Carl | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXXX | xxxxxxxxxxxxxxxxx | <u>۵</u> | | | |
| Eduard | XXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 鱼 | | | |
| Shelly | XXXXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | <u>ش</u> | | | |

Figure 98: IPPS User Administration Screen

| Confirm Deletion | × |
|--|---|
| This action will delete the user from all stations you have in common. | |
| Do you want to continue? | |

Figure 99: Confirm Deletion

7.7.2.5. Reactivate a User

If a user has not logged into IPPS in the last 90-days, that user no longer has access to the system. If this is the case, when you view the user in the User Administration screen, the Enable button is displayed. For the user to regain system access complete the following:

- 3. From the User Administration screen, select the **Enable User** button next to the user you want to reactivate.
- 4. Select the **Ok** button. The user now has access to the system.

| My Work | IPPS User Adm 🕷 | | | |
|-----------------|----------------------------|------------------|---------------------|----------|
| If you have acc | cess to multiple Stations, | Select to Change | | |
| Select a Statio | n 372 🗸 |] | | |
| New User | 1 | | | |
| FirstName | LastName | UserID | Role | |
| Miles | | | IPPS:VREReadOnly | finable |
| Katie Jo | | | IPPS:VRECaseManager | 量 |
| Joann | | | IPPS:VRECaseManager | <u>ش</u> |

Figure 100: Reactivate a User with the Enable button

7.7.2.6. Delete User-Assigned Authorizations

To delete authorizations for a user, complete the following:

- 1. Select the User's Name from the IPPS User Administration screen. The User Details screen displays.
- 2. Select the **Trashcan** to the right of the authorization you want to remove from the user. The Authorization is deleted from the window.
- 3. Select the **Submit** button. Your changes are saved.

| My Work IP | PS User Adm ≍ | | | |
|--------------------|--|---------------|---------------------|----------|
| If you have access | to multiple Stations, Sele | ect to Change | | |
| Select a Station | 101 🗸 | | | |
| New User | | | | |
| New Oser | | | | |
| FirstName | LastName | UserID | Role | |
| Jeremy | XXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 童 |
| Brenda | XXXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 鱼 |
| Carl | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXXX | xxxxxxxxxxxxxxxx | 鱼 |
| Eduard | XXXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 血 |
| Shelly | xxxxxxxxxxxxxx | XXXXXXX | IPPS:VRECaseManager | 血 |

Figure 101: IPPS User Admin Screen

| elected User | Details | | |
|----------------|---------------|---------------------|----------|
| User | | | |
| ID: | | | |
| First Name: | | Last Name: | |
| Assign a | Role | | |
| IPPS:VF | RECaseManaç 🗸 | | |
| | | | |
| | | | |
| Station | Authorization | n Number (Optional) | |
| oración | Hattonization | (optional) | |
| 101 | 10098 | ť | <u>ل</u> |
| | | | |
| 101 | 20078 | Ū | Ì |
| 301 | 30012 | ť | Ì |
| 101 | 40018 | ť | ļ |
| \oplus | | | |
| ~ | | | |
| | | | |

Figure 102: User Details and Remove an Authorization

7.7.2.7. Re-assign an Authorization Number

To re-assign an authorization number to another user, complete the following:

1. Select the User's Name from the IPPS User Admin screen. The User Details screen displays.

| My Work IP | PS User Adm 🕷 | | | |
|--------------------|----------------------------|---------------|---------------------|----------|
| If you have access | to multiple Stations, Sele | ect to Change | | |
| Select a Station | 101 🗸 | | | |
| | | | | |
| New User | | | | |
| FirstName | LastName | UserID | Role | |
| Jeremy | XXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 血 |
| Brenda | XXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | ۵ |
| Carl | XXXXXXXXXXXXXXX | XXXXXXX | xxxxxxxxxxxxxxxxx | 血 |
| Eduard | XXXXXXXXXXXXXXX | XXXXXXX | IPPS:VRECaseManager | 量 |
| Shelly | ****** | XXXXXXX | IPPS:VRECaseManager | 鱼 |

Figure 103: IPPS User Admin Screen

2. Select the **Plus** sign below the station name towards the bottom of the User Details screen. An additional line displays for the authorization you want to add.

| User Detail | S | | |
|-----------------|--------------|----------------------|---|
| Selected User D | etails | | |
| User ID: | | | |
| First Name: | | Last Name: | |
| Assign a F | Role | | |
| IPPS:VR | ECaseManaç 🗸 |] | |
| _ | | | _ |
| Station | Authorizatio | on Number (Optional) | |
| 101 | 10098 | | 血 |
| 101 | 20078 | | 曲 |
| 301 | 30012 | | ۵ |
| 101 | 40018 | | 曲 |
| \oplus | | | |
| | | | |
| Submit | Cancel | | |
| Submit | Cancer | | |

Figure 104: Select Plus Sign to Add an Authorization

- 3. Select the **Station Number** associated with the Authorization Number.
- 4. Enter the Authorization into Authorization Number field.

| Station | Authorization Number (| Optional) |
|---------|------------------------|-----------|
| 101 | 1234567891 | 1 |
| 528 | 7834783478 | 1 |
| 101 | 7876678776 | 1 |
| 101 🗸 | 0 | 1 |

5. Select the **Submit** button. The new Authorization Number is added to the list of Authorizations for this user.

7.8. Dashboard

The dashboard provides users with the status of payment processing in the system. There are three categories displayed:

- 1. Invoices Pending Certification Over 14 Days
- 2. Invoices Pending Certification Greater Than or Equal to 30 Days
- 3. All Pending Invoices

To view the Dashboard, complete the following:

1. From the left navigation bar select **Dashboard**. The Dashboard Charts display.

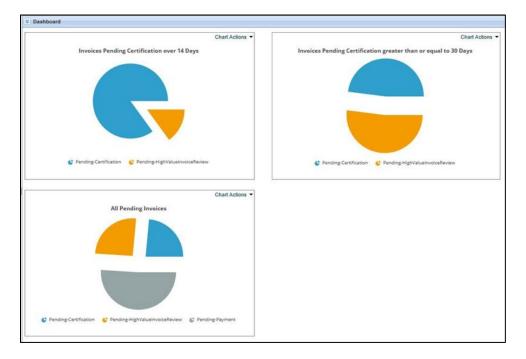


Figure 105: Dashboards

2. Hover over the images to show the percentage of invoices in that category

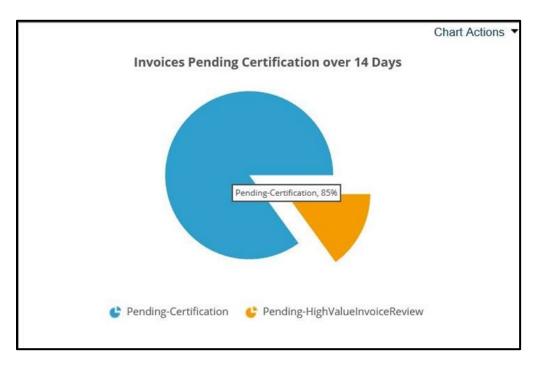


Figure 106: Example of Percentage of Invoices in that category

The charts have a Chart Actions dropdown menu selection. See the following section for more information.

7.8.1.1. Chart Actions

To show chart data and view further details complete the following:

1. Select **Show Data** from the Chart Actions dropdown menu.



Figure 107: Show Data

Fields associated with the chart display. The amount of days indicates the number of days since IPPS received the Invoice.

| nvoicesPendingCertificationOver14Days | Actions |
|--|--|
| | Generated on July 11,2019 09:53:48 AM |
| | |
| Filtered by: (Work status = Pending-Certification or Work s invSourceType = VREInvoice and CalculateAge CalculateAgeOfDate [.invoiceReceivedDate] <= Collapse all group beadings | OfDate [.invoiceReceivedDate] > 14 and |
| (Work status = Pending-Certification or Work s invSourceType = VREInvoice and CalculateAge | OfDate [.invoiceReceivedDate] > 14 and |
| (Work status = Pending-Certification or Work s invSourceType = VREInvoice and CalculateAge CalculateAgeOfDate [.invoiceReceivedDate] <= | OfDate [.invoiceReceivedDate] > 14 and 29 and stationNum = 101 |
| (Work status = Pending-Certification or Work s invSourceType = VREInvoice and CalculateAge CalculateAgeOfDate [.invoiceReceivedDate] <= Collapse all group headings | OfDate [.invoiceReceivedDate] > 14 and 29 and stationNum = 101 DLI |

Figure 108: Show Data Fields

- 2. Select an **entry** in the first column to drill down further into details. The Invoice Detail Report displays.
- 3. Select the Action button to Refresh, Export to PDF, or Export to Excel.

NOTE: For the Action button's drop down menu options will vary, since they are UI specific (e.g., different reports have different options).

| Invoice Detail Report | rt - Internet Explorer | | | | | | | | | | | | - 0 |
|---|----------------------------------|---------------------------|------------------|----------------|--------------------------------|-----------------------------------|----------------------------------|--------------------------------|--|----------------------------------|---|--------------------------------|----------------|
| Invoice Detail Report | | | | | | | | | | | | | Actions |
| | | | | | | | | | | | Au | enerated on agust 15,2019 1 | |
| InvocasPendingCert | idicationOver14Days > Pending-Co | ertification | | | | | | | | | | | |
| InvoicesPendingCert Displaying 3 records | tificationOver14Days > Pending-O | erification | | | | | | | | | | | |
| | | | Participant Name | Participant ID | Participant SSN | Authorization Number | Enrollment Start Date | Enrollment End Date | Invoice Received Date | Days Pending Certification (Age) | | Total Due | Invoice Status |
| Displaying 3 records | | Vendor TIN | | Participant ID | Participant SSN 223-19-9003 | Authorization Number 101940151 | Enrollment Start Date 8/12/19 | Encollment End Date 8/12/19 | Invoice Received Date Jul 20, 2019 1:00:00 AM | | | Total Due | |
| Naplaying 3 records | Vendor Banne | Vendor TIN 74600020312 | ELIZABETH JACOB | | | | | | | 26 | Case Hanager Email bined.kumartest2@va.gov | Total Due | Invoice Status |

Figure 109: Drill Down Report

7.9. Monitor Activity

The Monitor Activity section of IPPS, like the Dashboard, allows users to retrieve data to monitor the health of a station's invoice processing.

NOTE: Results are filtered to the station(s) the user has access to.

To access Monitor Activity, complete the following:

1. Select the **Monitor Activity** button from the left navigation bar. A reports list displays.

Reports available include the following

- All Pending Invoices
- Credit Memo Report
- Credit Memo Report Resolved
- Invoice Paid Over Thresholds
- Invoices Pending Certification Greater Than or Equal To 30 Days
- Invoices Pending Certification Over 14 Days
- Invoices Refused by Certifying Official

| Reports | |
|---|---|
| Report name | Description |
| All Pending Invoices | All Pending Invoices |
| Credit Memo Report | List of all credit memo invoices |
| Credit Memo Report - Resolved | List of all credit memo invoices resolved |
| Invoices Paid Over Thresholds | Invoices Paid Over Thresholds |
| Invoices Pending Certification Greater Than or Equal To 30 Days | Invoices Pending Certification Greater Than or Equal To 30 Days |
| Invoices Pending Certification Over 14 Days | Invoices Pending Certification Over 14 Days |
| Invoices Refused by Certifying Official | Invoices Refused by Certifying Official |

Figure 110: Monitor Activity Listing

7.9.1. Viewing a Report

To view a report, complete the following steps:

- 1. Select the **Report** you want to view. The report you want to view. After a pause, the report displays in a new window.
- 2. You can drill down into the report by selecting the **heading (e.g., Pending Certification)** in the Work Status area for the desired detailed report.
- 3. Select the **Actions** button to complete the following:
 - a. Refresh
 - b. Export to PDF
 - c. Export to Excel

NOTE: For the Action button's drop down menu options will vary, since they are UI specific (e.g., different reports have different options).

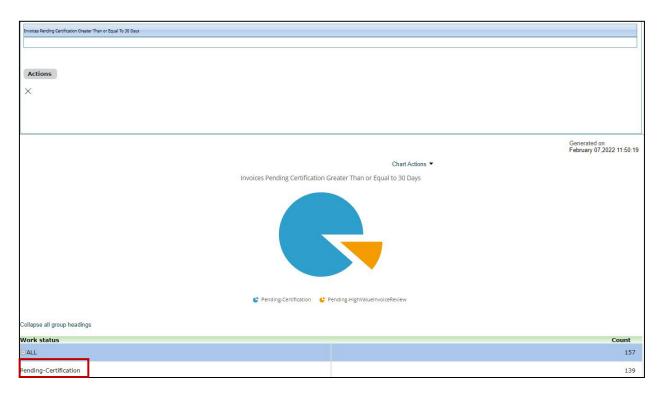


Figure 111: Sample Report

| NOTE. | To view a lancer in age in DDE format aclest 700m |
|-------|--|
| NUIL: | To view a larger image in PDF format, select Zoom |

| ucitie Detail Report | | | | | | | | | | | | | |
|------------------------|---|--------------|----------------------------|----------------|-----------------|----------------------|----------------------|--------------------|--------------------------|------------------------------------|-------------------------------|-----------|---|
| | | | | | | | | | | | | | Generalist on July 28 2019 83 11 43 PM |
| | Latur Singer That is \$quit 14.30 Days + Petidog-Cet) | Ruter | | | | | | | | | | | |
| Daytaying 28 millionte | | | | | | | | | | | | | |
| Station Number | Vander Natte | Vander TIN | Participant Rama | Participant 39 | Participant SSN | Astherization Number | Enrolment Start Date | Enrolmant End Date | Involce Received Data | Days Panding Certification (Age) 1 | Case Manager Email | Total Due | Involue Status |
| 347 | THE UNIVERSITY OF TEXAS | 74606030303 | IDUSIFER AND PARKER-DISTIN | 2234 | 123-12-3123 | 347940052 | 7/34/38 | 7/36/14 | Jun 23, 2019 1:00:00 AM | 34 | Inter Gauge@un.gov | 1260 | Pending Cathlanta |
| 147 | THE UNIVERSITY OF TERMS | 24600020382 | INVESTIGATION PARKER SHOTS | 2231 | 123-12-3125 | 347940003 | 7/10/15 | 1/34/19 | Non 23, 2018 1:00:00 AM | 28 | Salist. Group Hex.ptv | 1285 | Pending Certificatio |
| 947 | THE UNIVERSITY OF TEXAS | 14600020362 | SENATER AND PARKED SPETS | 2231 | 125-12-3123 | 347540002 | 1/18/18 | 2726758 | Ref. 23, 2019 1,00,00 AM | 36 | Justin Geographys.gov | 1260 | Fending Centratio |
| 343 | THE UNIVERSITY OF TEXAS | 74000022362 | JEWSTER-ANN PARKER-SHUTH | 2230 | 123-12-3123 | 347540003 | 9/18/19 | 7/25/18 | No. 23, 2019 1:00:00 AM | 36 | Justin, Gauged vie.gev | 1260 | Pending-Centitions |
| 187 | BOISE STATE UNIV | 82029270108 | DAVE CRIZ TOH | 7505 | 789-79-5789 | 347940003 | 7/34/39 | 7/31/19 | 3un 23, 2010 1:00:00 AM | 38 | Jantin Geopi@va.gin | 3710 | Feiding Centrols |
| 347 | BODE STATE UNIV | 82029070108 | | 7004 | 191-19-0789 | 347940003 | 2(18/19 | 3/31/18 | Jun 23, 2018 1:00:00 AM | 34 | Justin, Grappillers.gov | 2710 | Hending Cantilians |
| 347 | BODSE STATE UNIV | 42029070108 | | 2006 | 199-18-9789 | 347940003 | 2/10/14 | 1/35/19 | Jun 23, 2018 1:00:00 AM | 36 | Justin, Geografius, pro | 3710 | Ferding Centrals |
| 347 | BOISE STATE UNIV | 82029070108 | DAVE CRUZ TOM | 7008 | (89-78-6794 | 347540003 | 1/18/14 | 3733/18 | 3un 23, 2019 1:00:00 AM | 26 | Inches.Gauge@va.ges | 3718 | Pending-Camiliant |
| 247 | BOISE STATE UNIV | A2129071188 | DAVE CRIZ TOH | 2458 | 789-79-8795 | 347840023 | 2/16/19 | 7/35/19 | 3un 23, 2011 1:00:00 AM | 26 | Justic Group Brauges | 2715 | Pending-Cartification |
| 304 | THE UNIVERSITY OF TEXAS | 74600120307 | JOHN JAMES HOLLER M. | 421 | 115-13-1111 | 304340007 | 6/34/59 | 4/15/19 | Sun 20, 2019 L 00:00 AM | 29 | Justin Group Banges | 12760 | Pending Cardinani |
| 304 | THE UNIVERSITY OF TEXAS | 74600020302 | XOWN JAMES HILLER JR | A23 | 100-10-1013 | 304940304 | 6/10/19 | 8/14/19 | Jun 6, 2019 1 05:00 AM | 53 | latin.Geop@ve.gev | 440 | Feeding Centificate |
| 347 | BOUSE STATE UNIV | 82029250138 | DAVE CRIZ TOH | 7608 | 785-76-8788 | 347940003 | 2/35(138 | 3/25/59 | Hay 25, 3010 1:00:00 AM | 83 | Jastin, Geogo@va.geo | 2710 | Pending Centrulu |
| 347 | BOISE STATE UNIV | 82020070108 | GAVE CRUZ TOH | 1906 | 789-79-9799 | 347940003 | 2/38/34 | 1/34/19 | May 23, 2010 1-00-00 KM | 67 | Justin Geograffick are | 2716 | Pending Cartificatio |
| 362 | BOISE STATE ONLY | 82029070128 | GAVE CRUZ TOH | 2906 | 189-79-8789 | 347940003 | 3/38/19 | 2/24/19 | Hey 23, 2019 1-00:00 AM | 4.7 | Justin Gropp Birn, pro- | 2758 | Peopleg-Certificatio |
| 347 | BOISE STATE UNIV | 82029070108 | DAVE CRUZ TOM | 7006 | 789-29-8789 | 34.7940.003 | 7/18/59 | 2/26/14 | Hey 23, 2016 1-00-00 AM | 8.7 | Justin Gruppillum gen | 2718 | Penting Certificate |
| 347 | BOISE STATE UNIV | 825240/0108 | DAVE CRIZ TOM | 7626 | 285-29-5785 | 347540003 | 7/28/19 | 8/31/19 | May 23, 2010 1-00-00 AM | 4.7 | Justice, Galagier Weite, gale | 2718 | Perding Certificate |
| 34.7 | THE UNIVERSITY OF TEXAS | 14600020302 | 2016/07ER-ANN PARKER-SPETH | 2231 | 123-12-3123 | 347940002 | 7/38/108 | 7/34/59 | May 23, 2019 1:00:00 AM | 67 | Justin, Gauge Bird, pile | 1240 | Fending Cartificate |
| 347 | THE LINIVERSITY OF TEXAS | 74608125302 | JENNIFER-ANN PARKER-SMITH | 2221 | 121-12-1173 | 347940002 | 7/14/39 | 3/36/19 | May 33, 2019 1-00-00 AM | 6.7 | Justin Geografive.gov | \$260 | Petiding Cantilizate |
| 147 | THE UNIVERSITY OF TELES | 14400020382 | MARITER-AND PARKER-SHITS | 2231 | 125-12-3123 | 347940002 | 2/58/298 | 8/35/19 | Hey 23, 2019 1:00:00 AM | 8.7 | Justo, Geograd vo. gev | 1260 | Pending-Centificate |
| 347 | THE LINIVERSITY OF TERMS | 74600520302 | RENDER AND PARKER ON TH | 2231 | 123-12-3523 | 347949022 | 2/16/19 | 3/35/19 | Her 23, 2519 1-00-00 AM | 6.7 | Justin, Gauge Ban, gan | 1260 | Pending Carbficals |
| 347 | THE UNIVERSITY OF TEXAS | 24600321302 | IENNIFER ANN PARKER OFFICE | 2231 | 123-12-3123 | 347640002 | 7/16/3/9 | 2/25/19 | Hey 23, 2010 1:00:00 AM | 47 | Justin, Gauge But, pro- | 1290 | Ferding Certificate |
| 347 | THE LINUXERUTY OF TEAMS | 74600030382 | IDARITER-AND PARKER-DRITE | 2231 | 123-12-3123 | 347540003 | 7/30/59 | 7/31/19 | May 23, 3010 1-00-00 AM | 8.7 | Testa Gropp Dat gav | 1265 | Pending Certification |
| 347 | THE UNIVERSITY OF TEXAS | 74600331942 | IENNIPER ANN PARKER-SHITH | 2231 | 123-12-8128 | 347540362 | 7/18/54 | 1/36/18 | Hay 25, 2010 1:00:00 AM | 67 | laster, Gaugedtun gen | 30004 | Pending Cartificate |
| 100 | UN TEST SUPPLIER - REWITTOCOMPANYMAN | E 481264065 | JENNIPEA ANN FARAER SPICTS | 2231 | 123-12-3123 | 389940218 | 4/8/19 | 4/3/15 | Hay 2, 2008 1:00:00 AM | 44 | Justin Gaugettan gen | 160.1 | Pending Centilizatio |
| 304 | UN TEST SUPPLIER - REMITTOCOMPANYMENT | HE 481264065 | HORINY GRITS | 8711 | 333-35-3535 | 104940002 | 5/20119 | 5/24/59 | May 2, 2019 1-00-00 AM | 84 | Justin Groupedive gen | 139 | Fending-Centrum |
| 354 | US TEST SUPPLIER - REPOTTOCOPIDALISAN | E 481264085 | JOHN JAMES MILLER JR. | 823 | \$15-13-1311 | 201540004 | 6/16/19 | 8/34/19 | Feb 2, 2019 1:00:00 AM | 1.77 | Setter, Gaugedive gev | 139. | Perding-Cartification |
| 204 | UN TEST DUPPLIER - REMITTICCOMPANYMAN | R 481264065 | KHAN DAMES MILLER M | 421 | 133-13-1313 | 10+9+0203 | 4/10/19 | 8/24/18 | Pail 2, 2018 1 00 00 AM | 437 | Jay awat give gov | 110000 | Pending Carldoon |
| 304 | FEDEX GROUND PACKAGE EVSTEN IN | 481264065 | SOME JAMES MILLER M | 421 | 101-11-1113 | 304940308 | 6/11/19 | 4/14/13 | Feb 3, 2018 1,00:08 AM | 177 | Justa Group Bungts | 139 | Pending-Camiliania |
| 204 | FEDEX GROUND PACKAGE SYSTEM IN | 481264065 | KING MARKS MILLER IN | 823 | 103-13-1310 | 104840008 | 6/11/19 | 8/26/28 | Fell 3, 3019 1:00:08 4H | 177 | laster.Gauge@us.gov | 1.39 | Rending Calificate |

Figure 112: Detailed Report

8. Exporting to Excel

You can export data to Excel whenever the Export to Excel button displays. Complete the following:

3. To export to Excel, select the Export to Excel button. Export to Excel button.

| Search | Clear | |
|--------|-------|-----------------|
| | | Export to Excel |
| | | |

Figure 113: Export to Excel

- 2. You are asked "Do you want to open or save ExportData.xls from _____?. Select the **Open**, **Save** or **Cancel** button.
- 3. Select **Open** to view the document or **Save** to save the document to your computer.

| | | | | | - |
|---|------|--------|-------------|---------------|--------------------|
| ? | Open | Save | • | Cancel | × |
| | ? | ? Open | ? Open Save | ? Open Save 🔻 | Open Save + Cancer |

Figure 114: Open or Save

9. Troubleshooting

In this section, you'll find troubleshooting procedures for system errors.

9.1. User or Access Issues

9.1.1. Error When Logging In

If you fail to log off, you may encounter a screen error when you try to re-enter IPPS. To clear the error, select **File > New Session** from your IE11 browser and try again.

NOTE: On June 15. 2022 Internet Explorer (IE) 11 will be disabled. Use Microsoft Edge or Google Chrome for validated browser access.

9.1.2. Log-in Error Persists

Access is granted with a provisional 90-day activity window. If you do not log into IPPS within a 90-day period, your account is deactivated. Contact your Site Administrator.

To locate your local IPPS administrator complete the following:

- 1. Go to <u>https://vaww.ipps.fsc.va.gov/prweb/PRWebLDAP1/</u> An Authorized Use warning displays.
- 2. From the Select a VR&E Station dropdown menu, select your **Station**.

A list of site administrators displays for your station

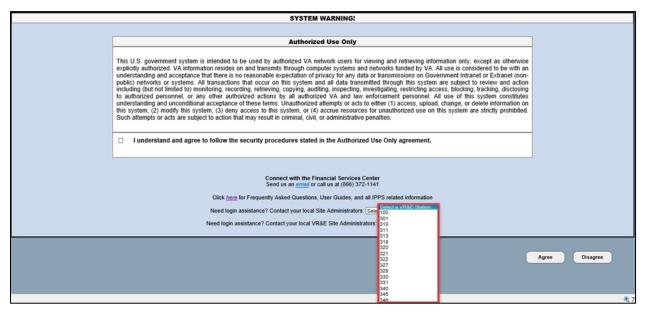


Figure 115: Authorization Notice

| Need login assistance? Contact your local VR&E Site Administrators: 372 | | | | |
|---|-------|--|--|--|
| Name | Email | | | |
| Kinnary | | | | |
| Dale | | | | |

IU. ACIUIIVIIIS

Figure 116: A list of Site Administrators

| Acronym | Description |
|---------|--|
| BOC | Budget Object Code |
| CWINRS | A case management system |
| DLN | Document Locator Number |
| EFT | Electronic Funds Transfer |
| FAQ | Frequently Asked Questions |
| FSC | Financial Services Center |
| GAL | Global Address Listing |
| IE11 | Internet Explorer 11 |
| IIS | Invoice Inquiry System |
| IPPS | Invoice Payment Processing System |
| PDF | Portable Document File format developed by Adobe |
| PIV | Personal Identity Verification |
| POC | Point of Contact |
| RO | Regional Office |
| SCO | School Certifying Official |
| SSD | Support Services Division |
| TIFF | Tagged Image File Format – one of several formats for digital graphics |
| VA | Veterans Affairs |
| VA-ONCE | VA-ONCE is an application used by SCOs to submit VA Forms 22-1999, 22-1999b, and 22-6553c. |
| VBA | Veterans Benefits Administration |
| VR&E | Veteran Readiness and Employment |

11. Appendix A. List of Status Conditions

The following are a list of status conditions:

- Pending-Certification
- Pending-HighValueInvoiceReview
- Pending-Unassigned
- Pending-PaymentConfirmationFMS
- Pending-ScheduledPayment
- Pending-VR&EFMSRejectionResolution
- Resolved-PaymentConfirmed
- Resolved-Archived