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. 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 view handling charges and mandatory taxes.
- 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 Station Authorization List screen. 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, search results 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 VAFSCEnterpriseSupport@va.gov
- 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 VR&E_IPPS.VBACO@va.gov

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).

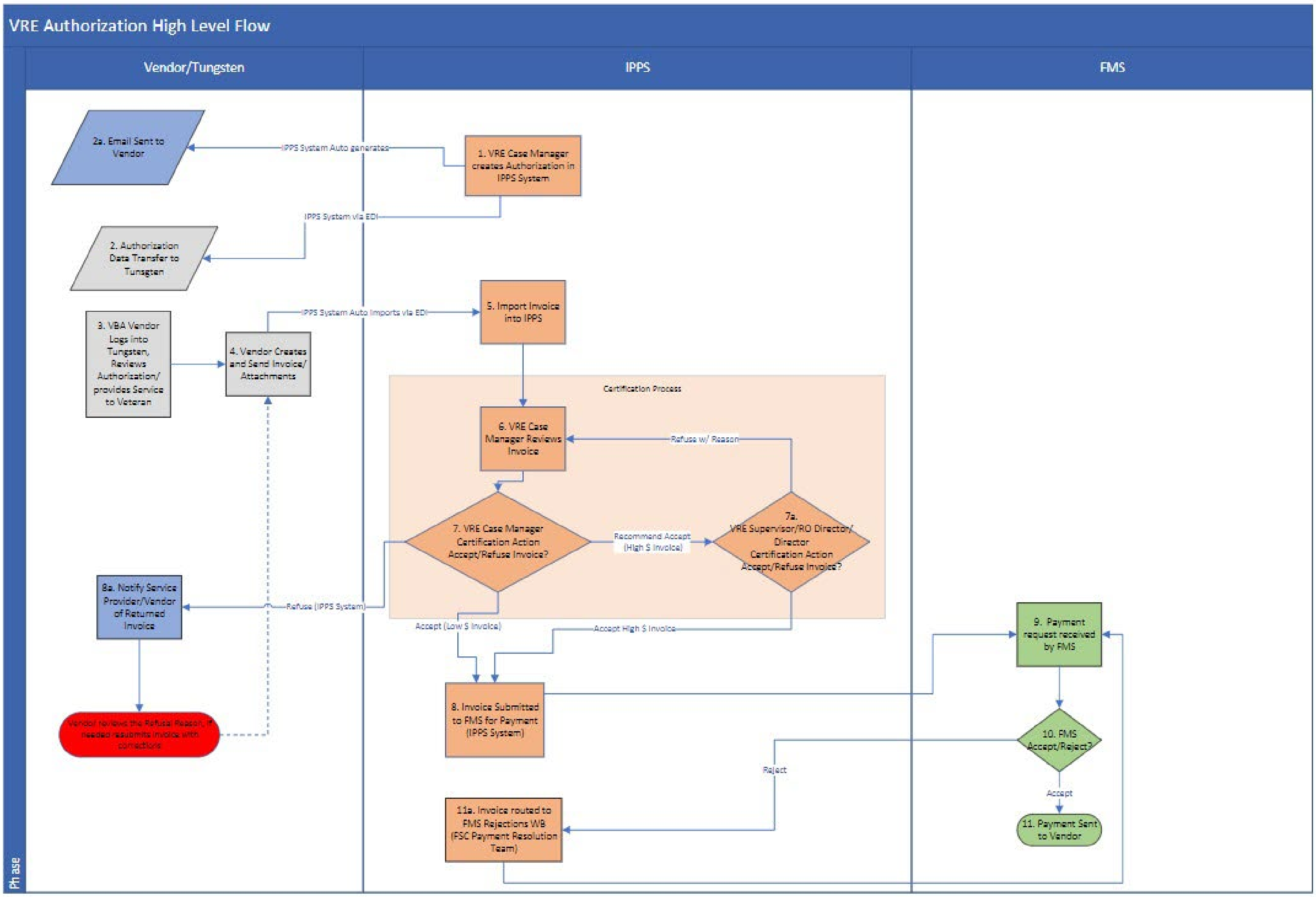


Figure 1: VR&E   High Level Flow

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	X									
VRE Case Manager	X	X					X	X	X	
VRE Supervisor	X	X	X		X		X	X	X	
VRE Site Admin	X			X	X	X				
VRE RO Director	X		X		X	X				
VRE Director	X		X		X	X				
VRE Read Only - 508	X									
VRE Case Manager - 508	X	X					X	X		
VRE Supervisor - 508	X	X	X		X		X	X		
VRE Site Admin - 508	X			X	X	X				
VRE RO Director - 508	X		X		X	X				
VRE Director - 508	X		X		X	X				
VRE National Read Only	X				X	X		X	X	X
VRE National Site Admin	X			X	X	X		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 <= $10,000	>$5,000 but <= $10,000	$25,000 but <=$50,000
RO Director	>$10,000 but <= $15,000	>$10,000 but <= $15,000	>$50,000 but <= $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.

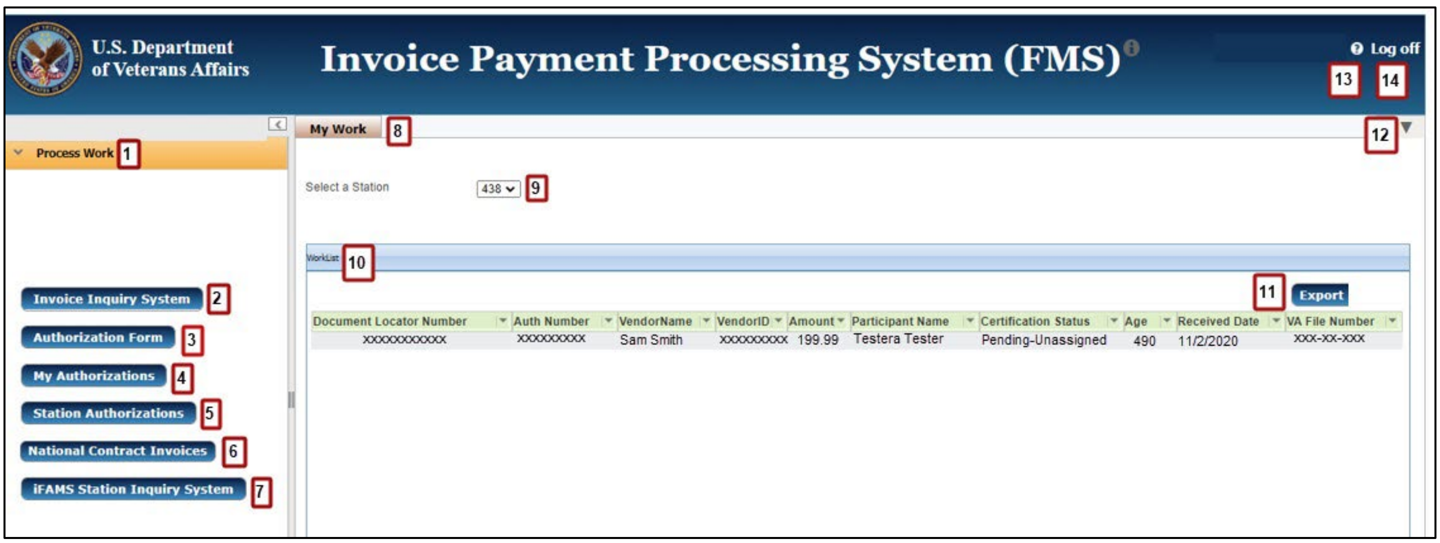


Figure 2: IPPS Initial Screen for Case Manager Role

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.

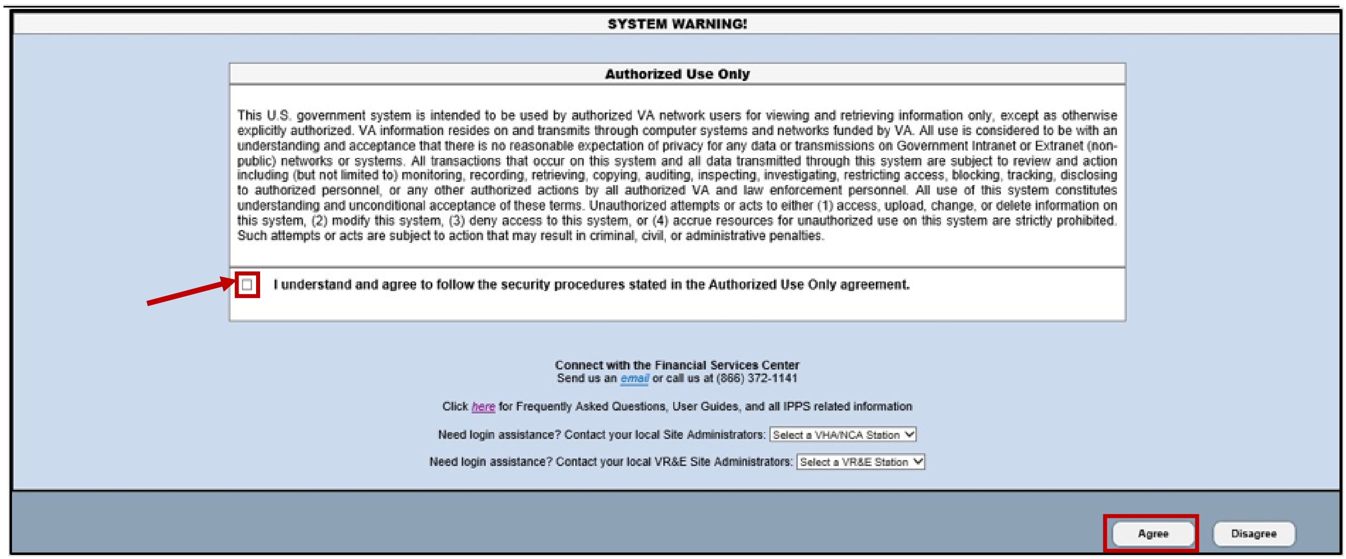


Figure 3: Authorization Use Screen

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, Section 9 Troubleshooting.*

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.

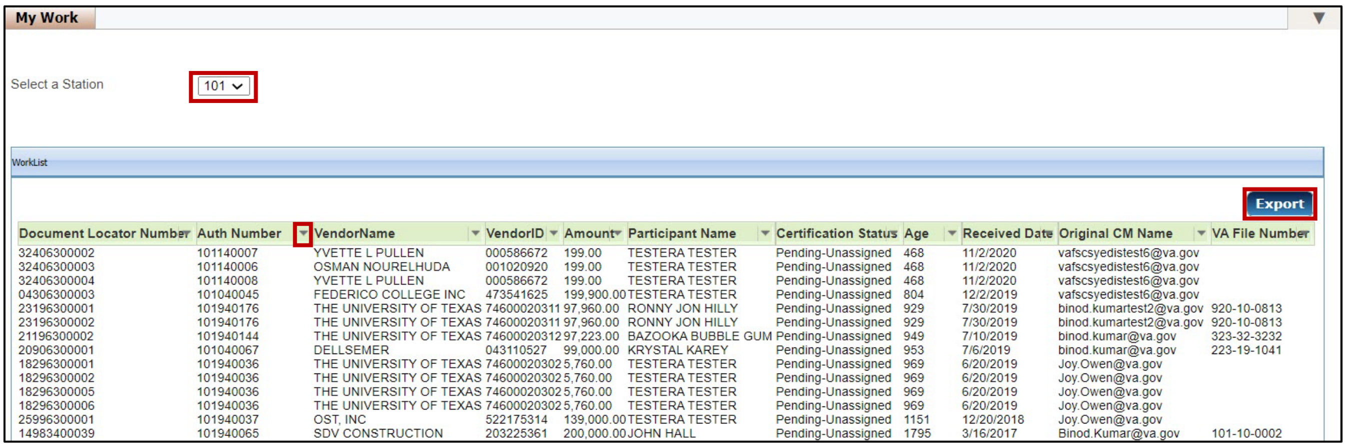
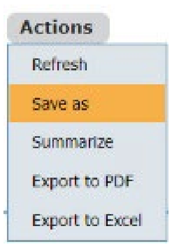


Figure 4: WorkList Screen

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.

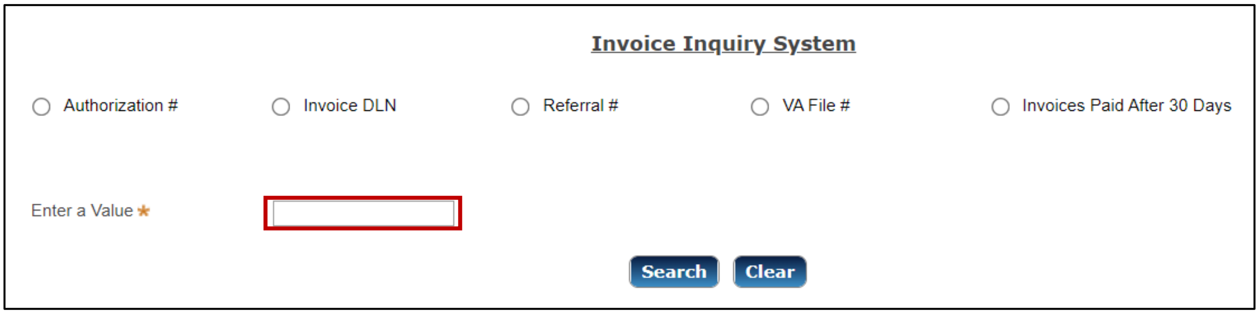
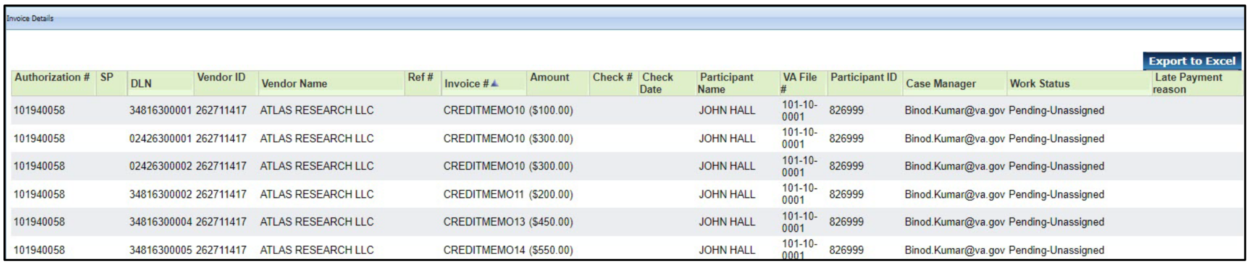


Figure 5: Invoice Inquiry System Screen



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		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		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)

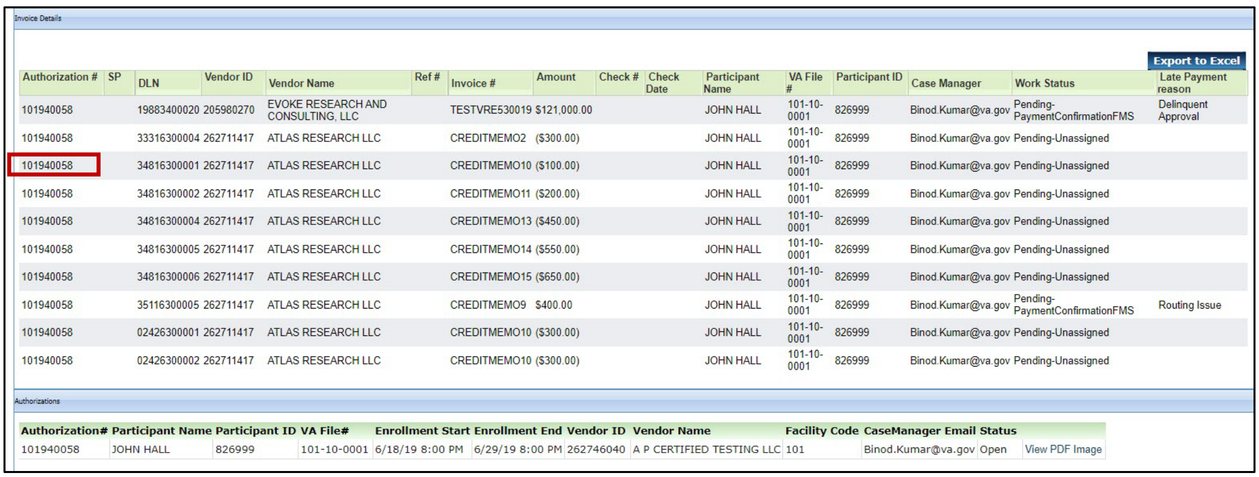
Column Title	Entry/Description
Participant ID	Unique ID assigned to the participant
VA File	Unique File Number assigned to participant.
Case Manager	The Case Manager associated with the PO
Work Status	This column displays the status of processing
Late Payment Reason	Explanation by the case manager of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



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		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
101940058		33316300004	262711417	ATLAS RESEARCH LLC		CREDITMEMO2	($300.00)			JOHN HALL	101-10-0001	826999	Binod.Kumar@va.gov	Pending-Unassigned	
101940058		34816300001	262711417	ATLAS RESEARCH LLC		CREDITMEMO10	($100.00)			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		34816300005	262711417	ATLAS RESEARCH LLC		CREDITMEMO14	($550.00)			JOHN HALL	101-10-0001	826999	Binod.Kumar@va.gov	Pending-Unassigned	
101940058		34816300006	262711417	ATLAS RESEARCH LLC		CREDITMEMO15	($650.00)			JOHN HALL	101-10-0001	826999	Binod.Kumar@va.gov	Pending-Unassigned	
101940058		35116300005	262711417	ATLAS RESEARCH LLC		CREDITMEMO9	$400.00			JOHN HALL	101-10-0001	826999	Binod.Kumar@va.gov	Pending-PaymentConfirmationFMS	Routing Issue
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	

Authorizations

Authorization#	Participant Name	Participant ID	VA File#	Enrollment Start	Enrollment End	Vendor ID	Vendor Name	Facility Code	CaseManager Email	Status	
101940058	JOHN HALL	826999	101-10-0001	6/18/19 8:00 PM	6/29/19 8:00 PM	262746040	A P CERTIFIED TESTING LLC	101	Binod.Kumar@va.gov	Open	View PDF Image

Figure 7: Invoice Status Search Results

VA Test Account UAT **Invoice**

Bill From
VA Test Account UAT
2680 S Val Vista Dr #152
TESTMY
TESTRG
Gilbert
AZ
85295
United States

Contact
Tel
Email

Ship From
VA Test Account UAT
2680 S Val Vista Dr #152
Gilbert
AZ
85295
United States

Bill To
Department of Veterans Affairs - Test Buyer Account
1 Test Drive
PO BOX 0
Austin
TX
32308

Contact
Tel
Email

Ship To
Department of Veterans Affairs - Test Buyer Account
1 Test Drive
PO BOX 0
Austin
TX
32308

Invoice No.	NCAslin503
PO Number	36828720C00040
Vendor Code	201195460
Invoice Date	05/18/2020
Currency	US Dollar
Amount to pay	30,000.00

Sent by Tungsten Network on	05/18/2020
Tungsten Network Transaction Number	BAA000016677289
Supplier Tungsten Number	AAA669397606
Buyer Tungsten Number	AAA408798528
Status	Sent

Delivery Note	
Payment Due By	05/18/2020

Remit To Address
VA Test Supplier - RemitToCompanyName
John Doe- RemitToContactName
1234 East Peidmont Rd- RemitToAddress1
PO BOX 7357: Additional address line.
Austin
TX
30067
UNITED STATES

CLIN / PO Line	Description	Quantity	Unit	Unit Price	Total	Discount %	Discount	Amount
1	Line Item	6	Each	5,000.00		0.00	0.00	30,000.000

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, 7.4 Viewing Audit Info).

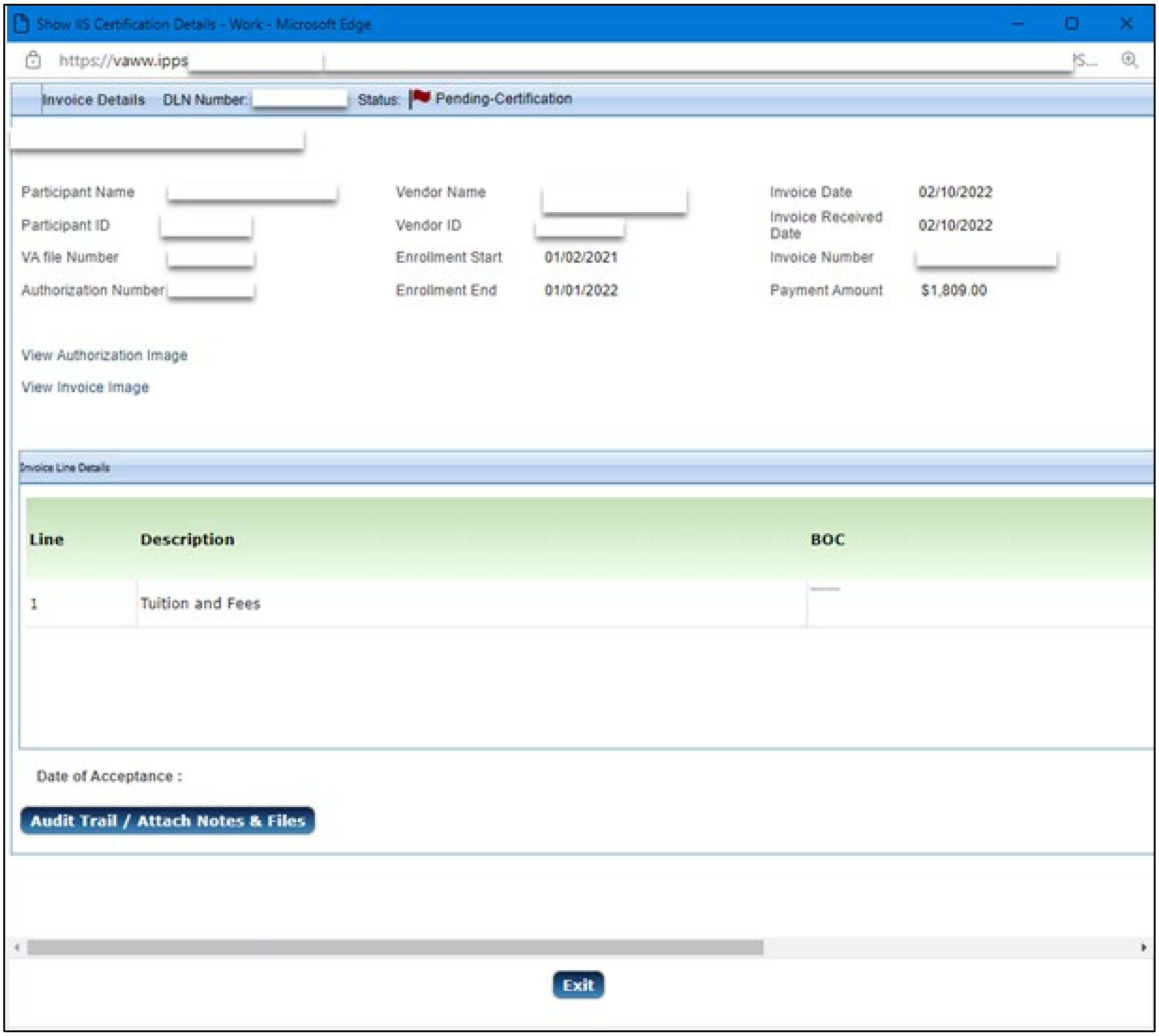


Figure 9: Invoice Details Example 1

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, 7.4 Viewing Audit Info).

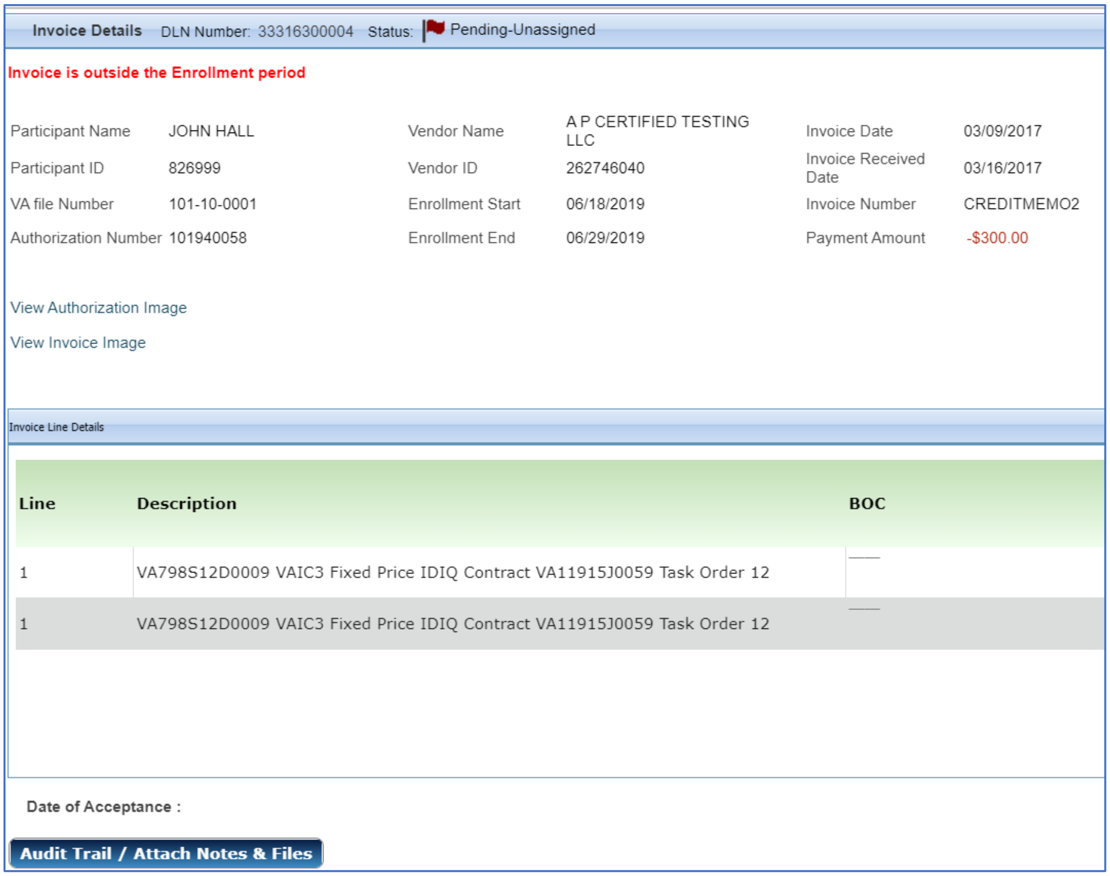


Figure 10: Invoice Details Example 2

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

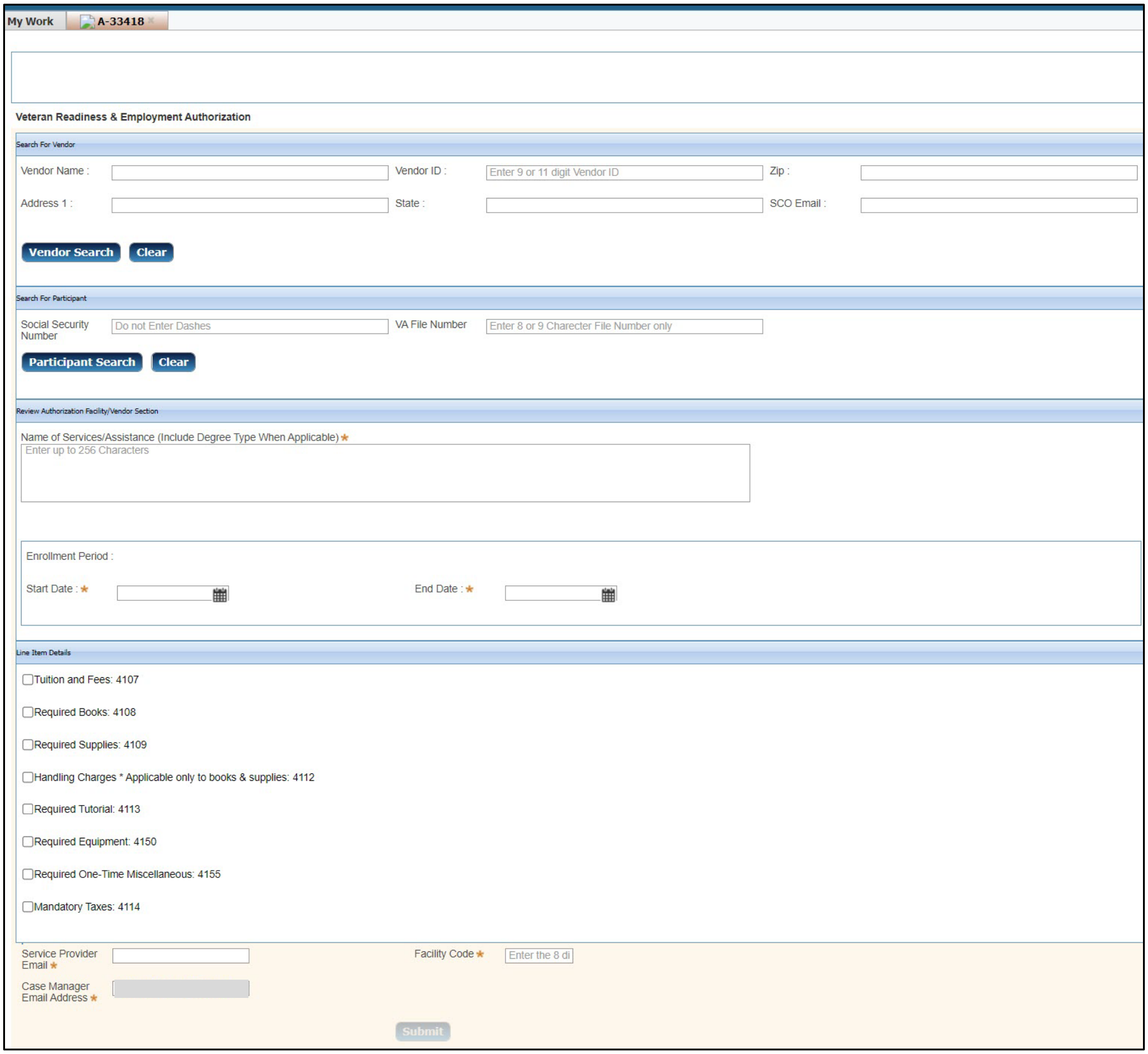


Figure 12: Veteran Readiness and Employment Authorization Form

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.*

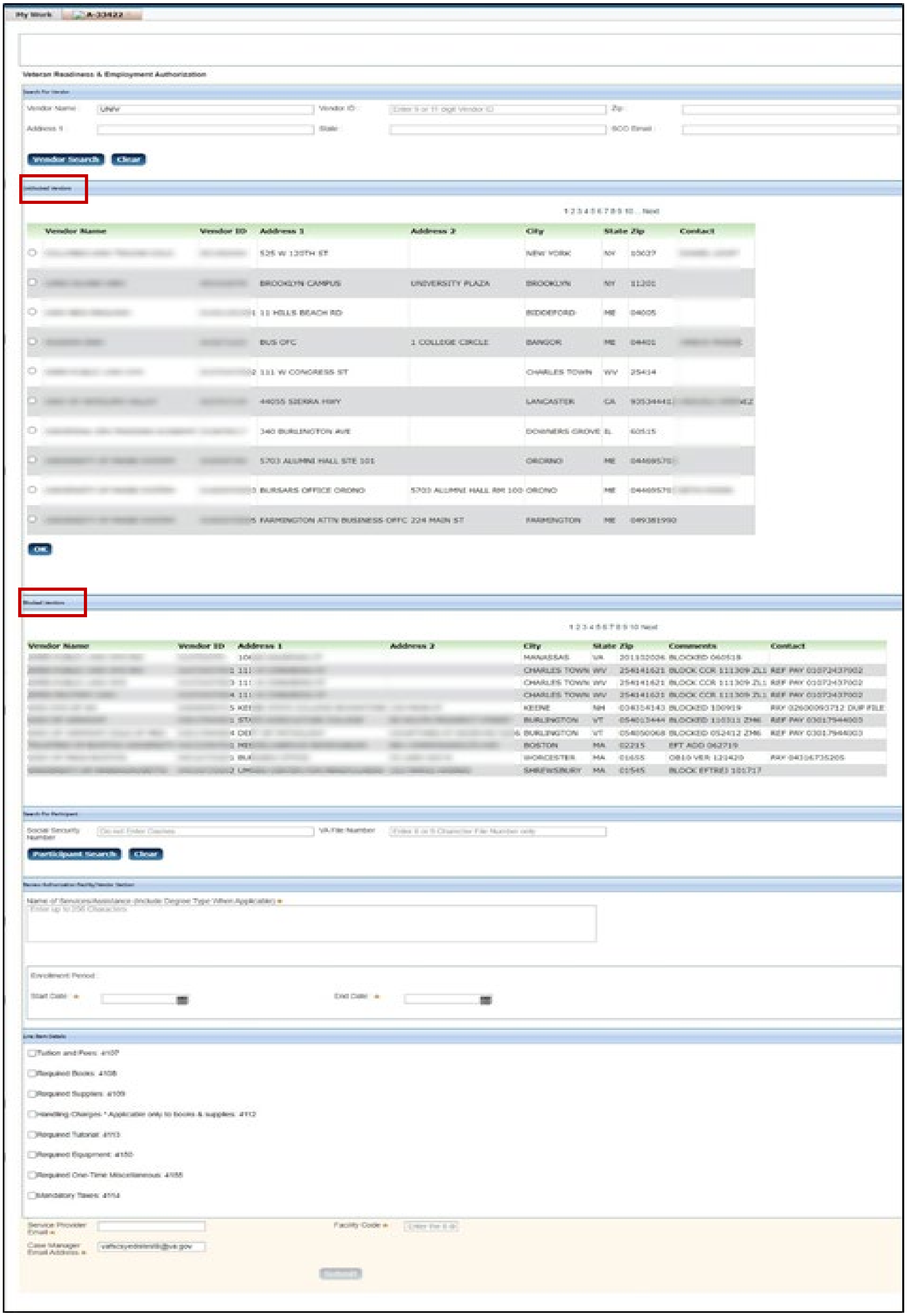


Figure 13: Vendor search results with Unblocked and Blocked Vendors listed

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

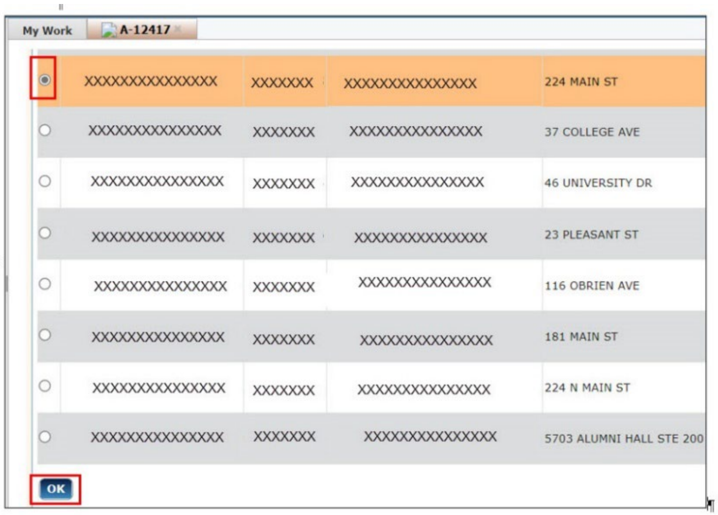


Figure 14: Vendor Selection

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.

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.

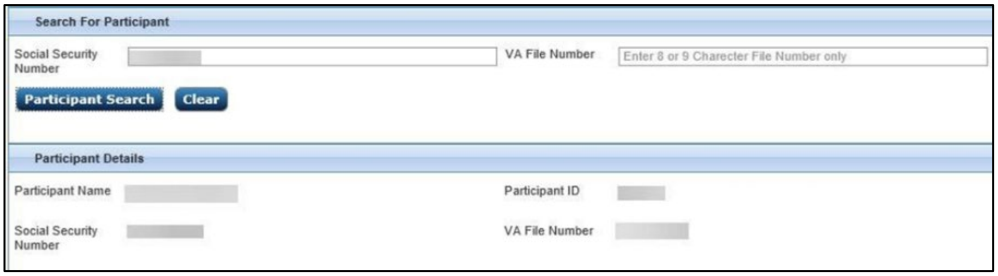


Figure 16: Search for Participant Screen

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.*

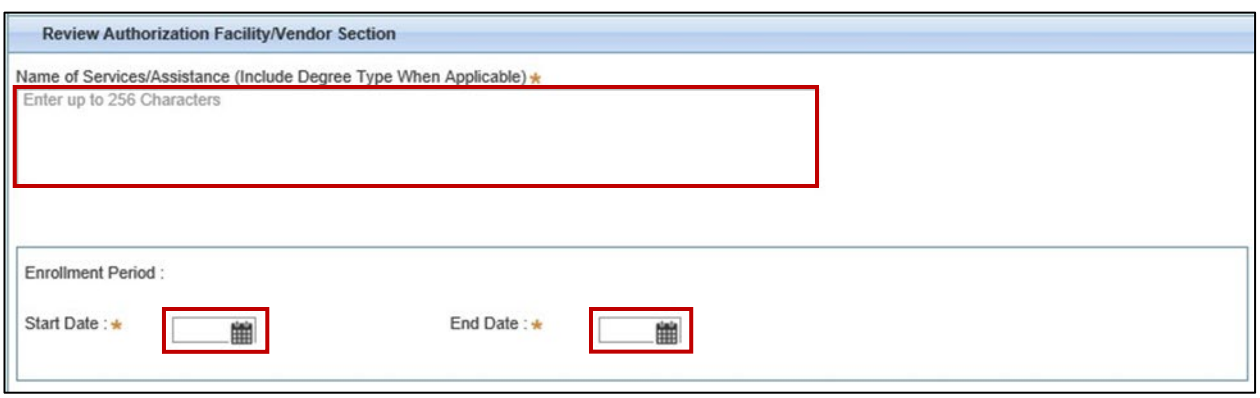


Figure 17: Name of Services/Assistance Sageera is this the latest screen in the UI

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.

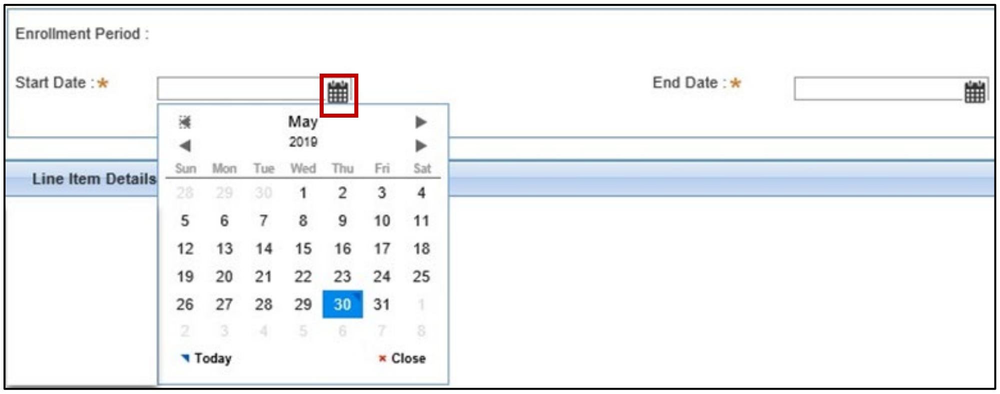


Figure 18: Start Date Calendar Tool

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

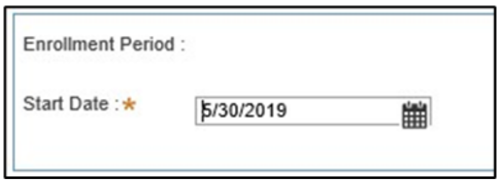


Figure 19: Date Field Filled

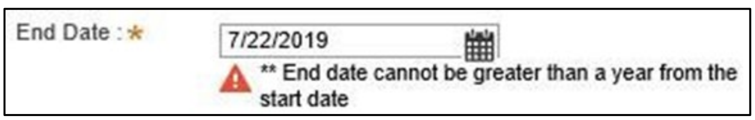


Figure 20: Date more than one year error

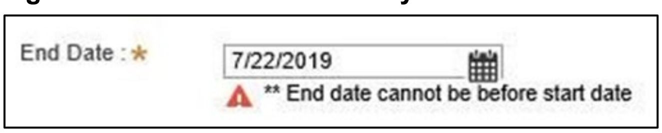


Figure 21: End Date not before Start Date error

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.

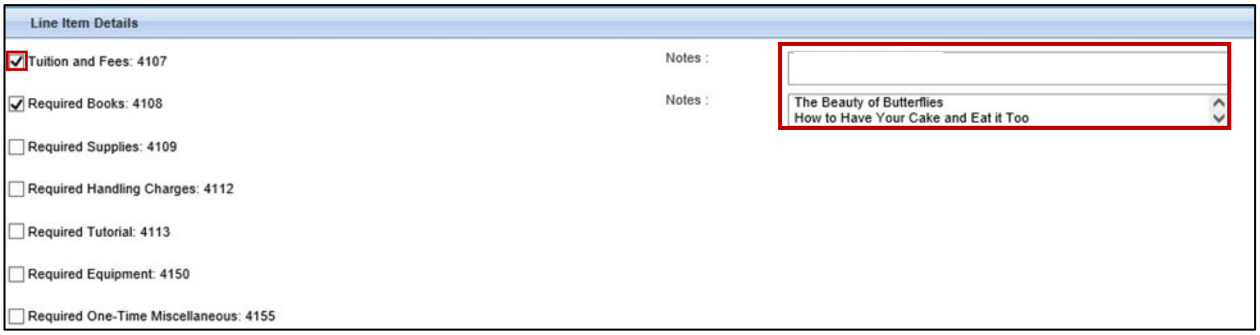


Figure 22: Line Item Details

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.
2. 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, My Authorizations).

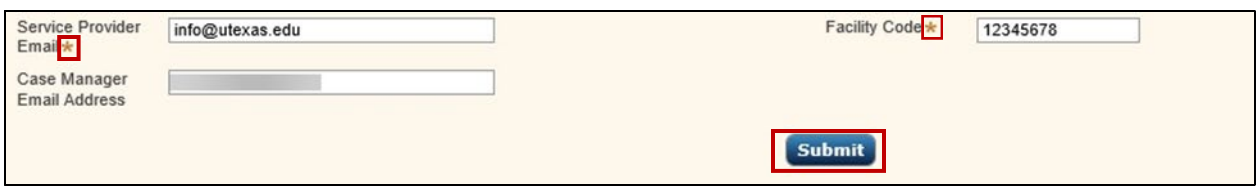
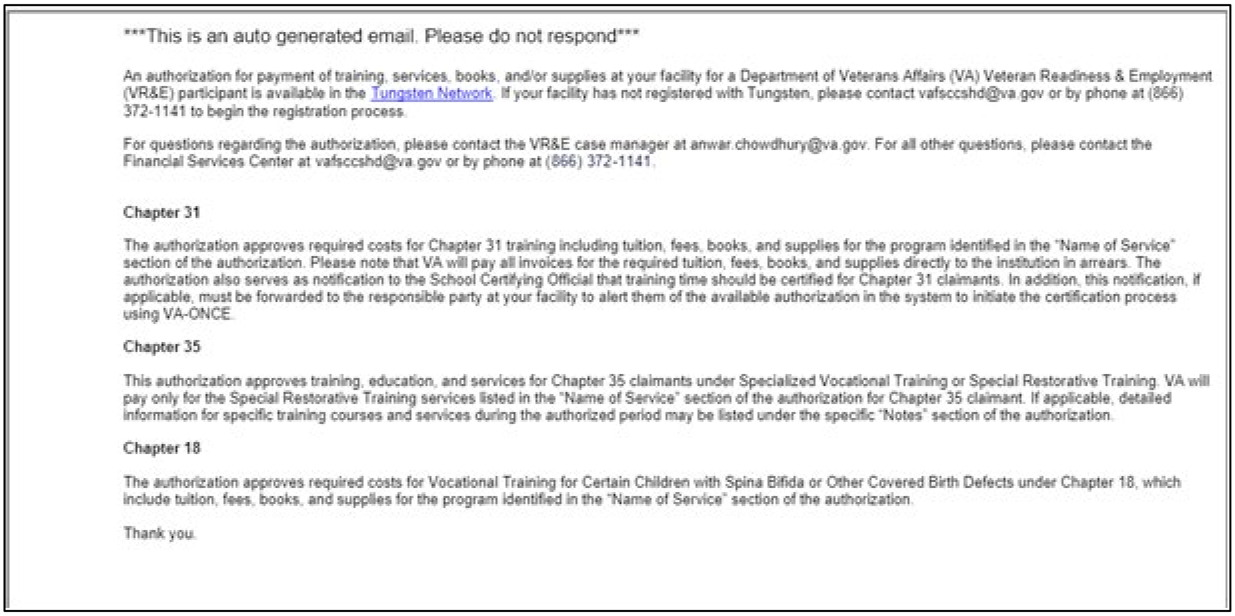


Figure 23: Authorization Fields

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.*



This is an auto generated email. Please do not respond

An authorization for payment of training, services, books, and/or supplies at your facility for a Department of Veterans Affairs (VA) Veteran Readiness & Employment (VR&E) participant is available in the Tungsten Network. If your facility has not registered with Tungsten, please contact vafsccshd@va.gov or by phone at (866) 372-1141 to begin the registration process.

For questions regarding the authorization, please contact the VR&E case manager at anwar.chowdhury@va.gov. For all other questions, please contact the Financial Services Center at vafsccshd@va.gov or by phone at (866) 372-1141.

Chapter 31

The authorization approves required costs for Chapter 31 training including tuition, fees, books, and supplies for the program identified in the "Name of Service" section of the authorization. Please note that VA will pay all invoices for the required tuition, fees, books, and supplies directly to the institution in arrears. The authorization also serves as notification to the School Certifying Official that training time should be certified for Chapter 31 claimants. In addition, this notification, if applicable, must be forwarded to the responsible party at your facility to alert them of the available authorization in the system to initiate the certification process using VA-ONCE.

Chapter 35

This authorization approves training, education, and services for Chapter 35 claimants under Specialized Vocational Training or Special Restorative Training. VA will pay only for the Special Restorative Training services listed in the "Name of Service" section of the authorization for Chapter 35 claimant. If applicable, detailed information for specific training courses and services during the authorized period may be listed under the specific "Notes" section of the authorization.

Chapter 18

The authorization approves required costs for Vocational Training for Certain Children with Spina Bifida or Other Covered Birth Defects under Chapter 18, which include tuition, fees, books, and supplies for the program identified in the "Name of Service" section of the authorization.

Thank you.

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.

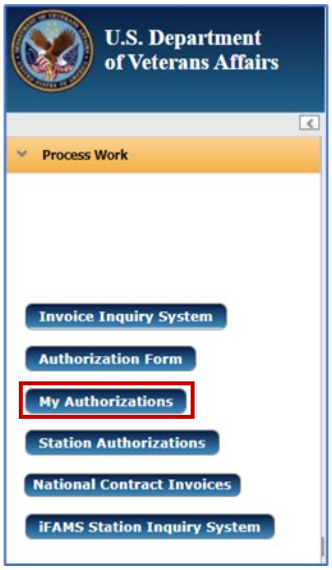


Figure 25: Selecting My Authorizations

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.

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	Copy
12/09/2021 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	Copy
12/09/2021 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	Copy
12/09/2021 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	Copy
11/16/2021 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	Copy
11/16/2021 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	Copy
11/01/2021 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	Copy
09/17/2021 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	Copy
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	Copy
06/07/2021 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	Copy
06/07/2021 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	Copy
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	Copy

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.

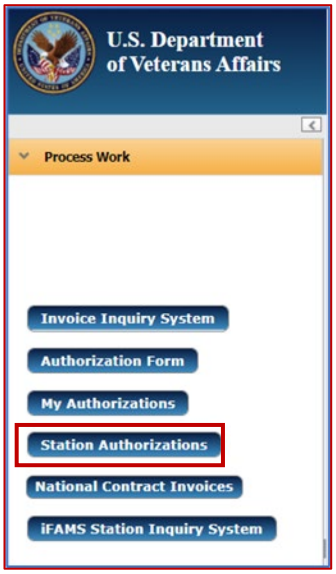
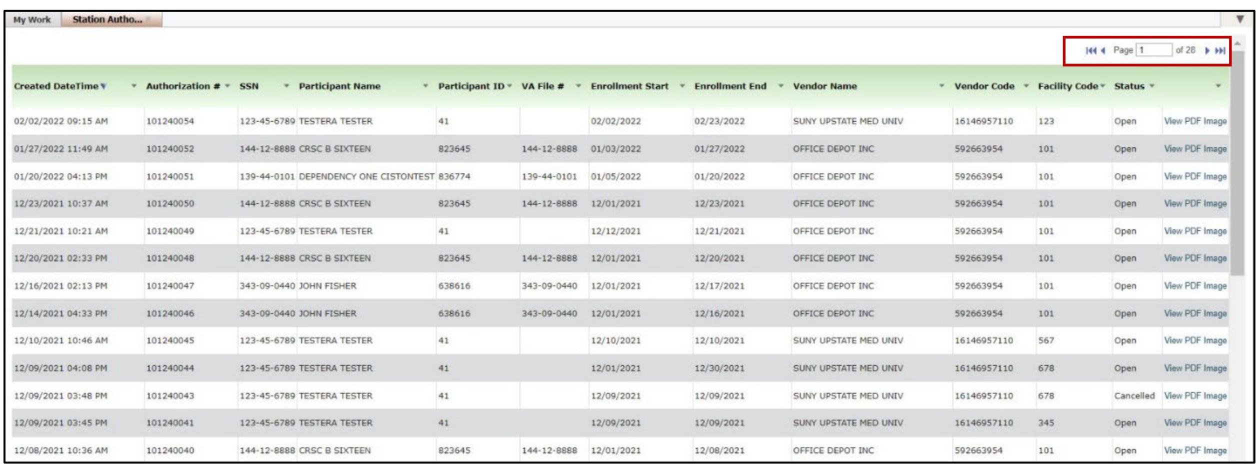


Figure 27: Selecting Station Authorizations

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.*



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	View PDF Image
01/27/2022 11:49 AM	101240052	144-12-8888	CRSC 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	DEPENDENCY 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	CRSC 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	TESTERA 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	CRSC 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	JOHN 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	JOHN 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	TESTERA 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	TESTERA 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	TESTERA 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	TESTERA 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	CRSC 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.

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

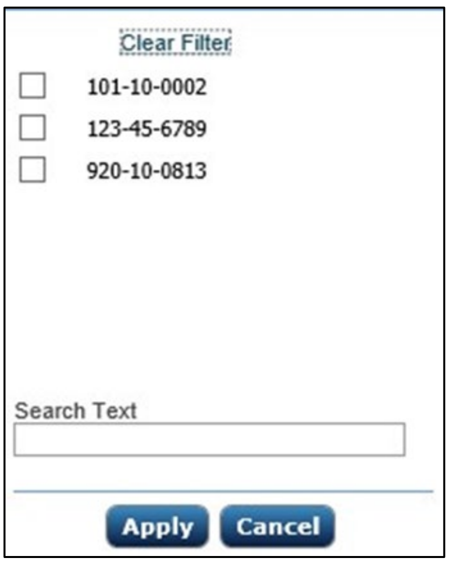


Figure 30: Example Filter Dialog Box

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

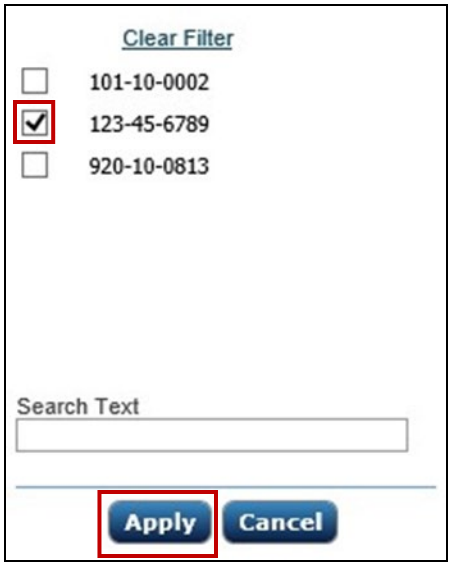


Figure 31: Select Filter Option

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.

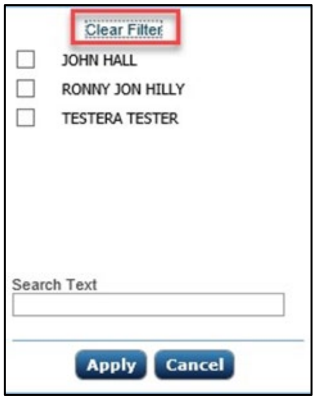


Figure 33: Clear Filter

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.*

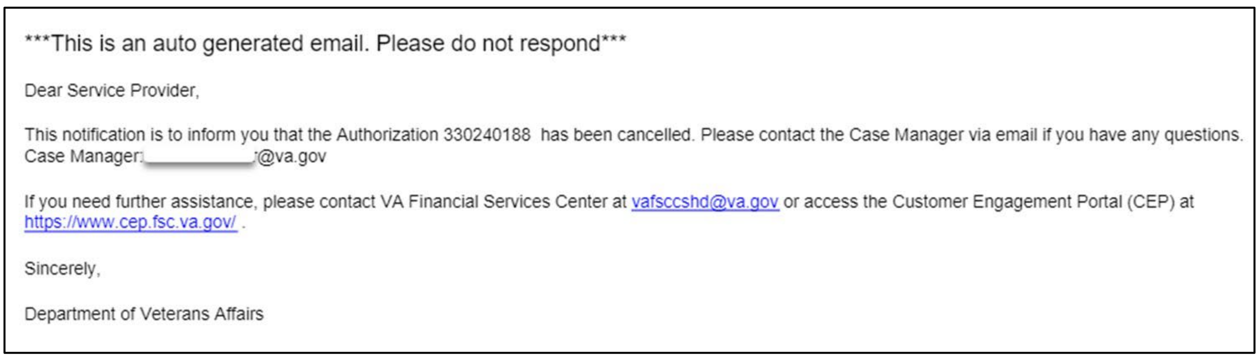
Figure 34: Canceling an Authorization

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

Figure 35: Cancel Authorization Prompt

Figure 36: Canceled Status for Authorization

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



This is an auto generated email. Please do not respond

Dear Service Provider,

This notification is to inform you that the Authorization 330240188 has been cancelled. Please contact the Case Manager via email if you have any questions.
Case Manager: [redacted]@va.gov

If you need further assistance, please contact VA Financial Services Center at vafsccshd@va.gov or access the Customer Engagement Portal (CEP) at https://www.cep.fsc.va.gov/ .

Sincerely,

Department of Veterans Affairs

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 Section 7.2 My Authorizations to open the My Authorization Report.
2. Select **View PDF Image** to view the PDF. The PDF displays.

Figure 38: View PDF Image

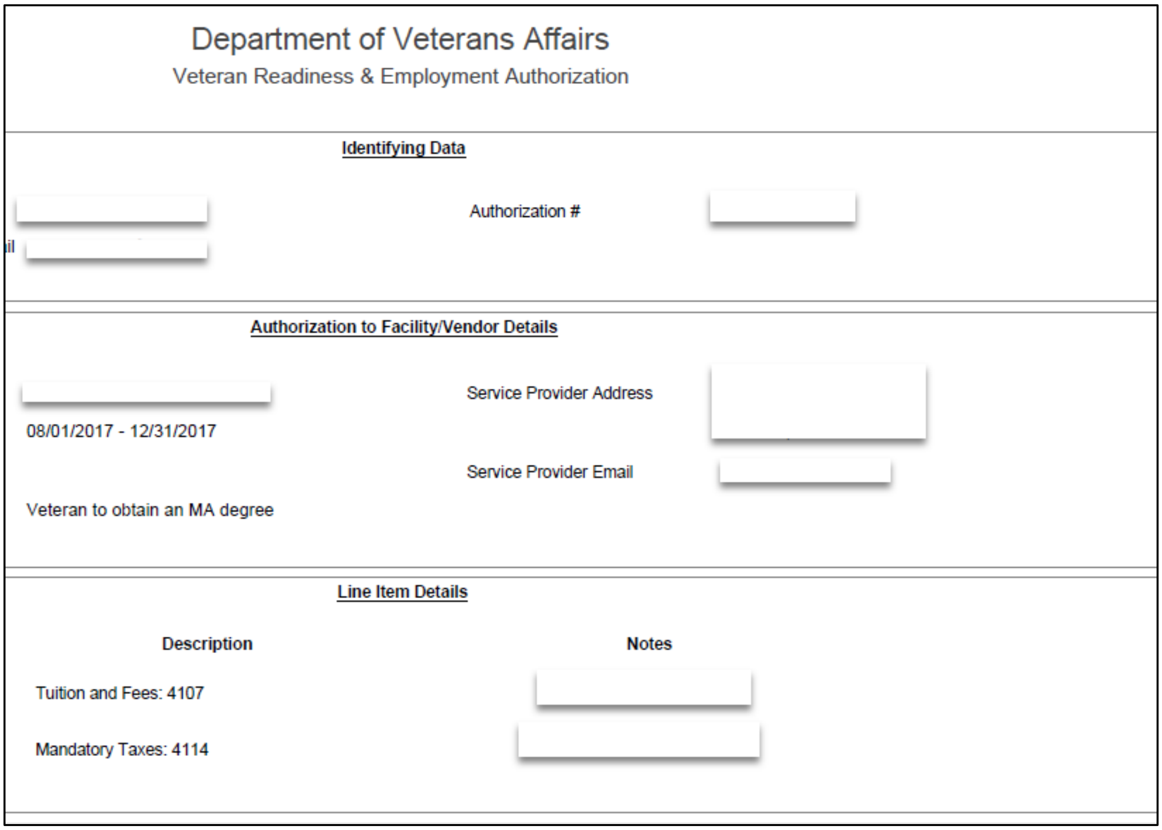


Figure 39: View PDF Image Results

7.2.7. Refreshing the Screen

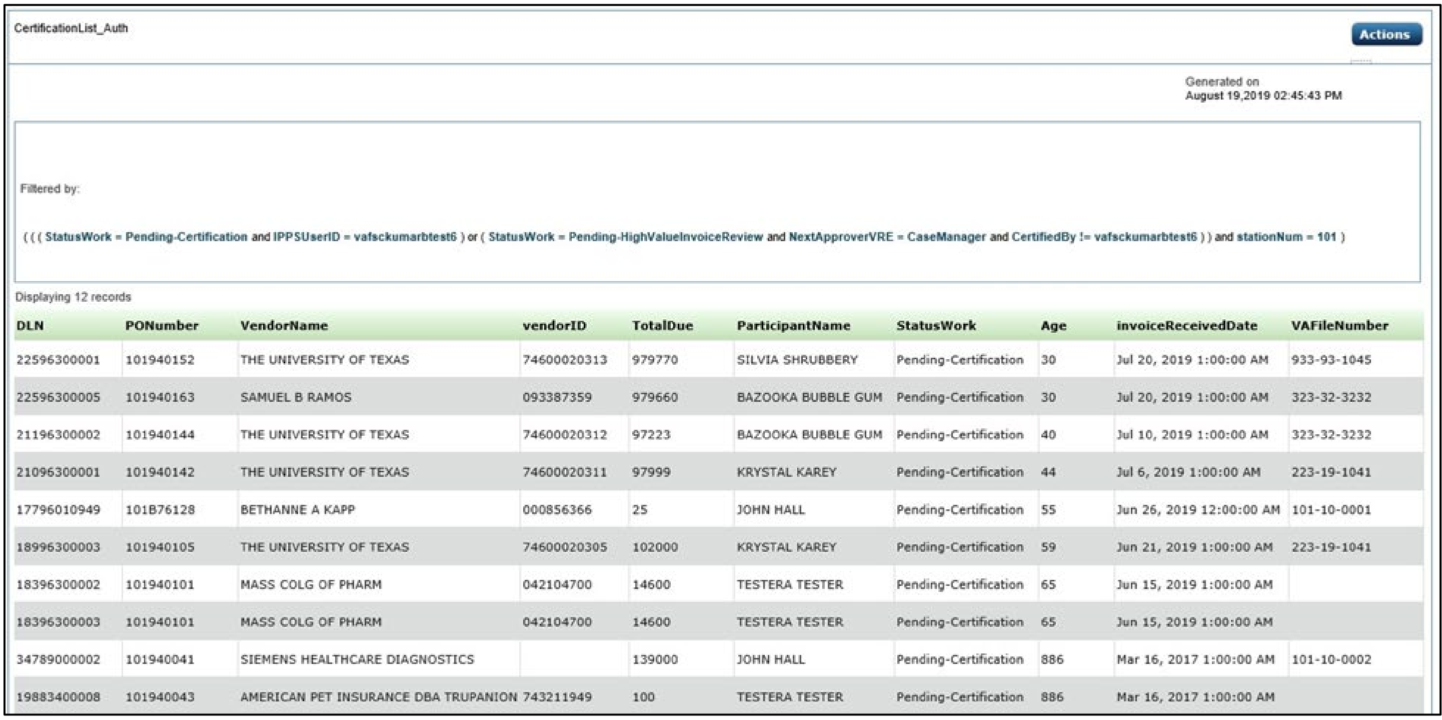
If the Refresh button displays, complete the following:

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.

Figure 40: Refresh Button

7.3. Certifying Invoices

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



CertificationList_Auth

Actions

Generated on
August 19,2019 02:45:43 PM

Filtered by:

(((StatusWork = Pending-Certification and IPPSUserID = vafsckumarbtest6) or (StatusWork = Pending-HighValueInvoiceReview and NextApproverVRE = CaseManager and CertifiedBy != vafsckumarbtest6)) and stationNum = 101)

Displaying 12 records

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	101B76128	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	
34789000002	101940041	SIEMENS HEALTHCARE DIAGNOSTICS		139000	JOHN HALL	Pending-Certification	886	Mar 16, 2017 1:00:00 AM	101-10-0002
19883400008	101940043	AMERICAN PET INSURANCE DBA TRUPANION	743211949	100	TESTERA TESTER	Pending-Certification	886	Mar 16, 2017 1:00:00 AM	

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

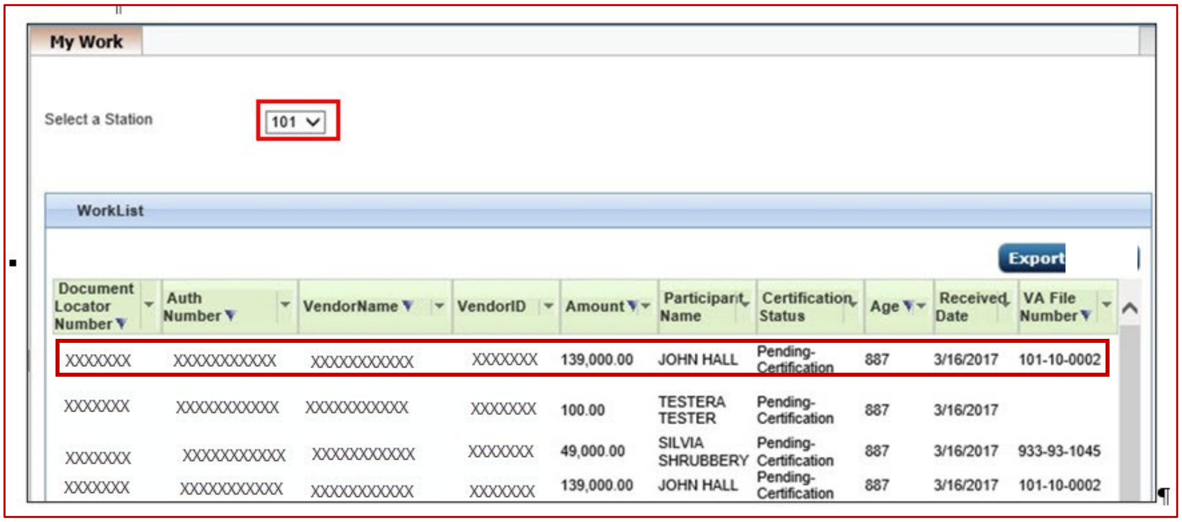


Figure 42: WorkList Screen

VA Test Account UAT **Invoice**

Bill From

VA Test Account UAT
2680 S Val Vista Dr #152
TESTMY
TESTRG
Gilbert
AZ
85295
United States

Contact
Tel
Email

Ship From

VA Test Account UAT
2680 S Val Vista Dr #152
Gilbert
AZ
85295
United States

Bill To

Department of Veterans Affairs - Test Buyer Account
1 Test Drive
PO BOX 0
Austin
TX
32308

Contact
Tel
Email

Ship To

Department of Veterans Affairs - Test Buyer Account
1 Test Drive
PO BOX 0
Austin
TX
32308

Invoice No.	NCAslin503
PO Number	36828720C00040
Vendor Code	201195460
Invoice Date	05/18/2020
Currency	US Dollar
Amount to pay	30,000.00

Sent by Tungsten Network on	05/18/2020
Tungsten Network Transaction Number	BAA000016677289
Supplier Tungsten Number	AAA669397606
Buyer Tungsten Number	AAA408798528
Status	Sent

Delivery Note	
Payment Due By	05/18/2020

Remit To Address
VA Test Supplier - RemitToCompanyName
John Doe- RemitToContactName
1234 East Peidmont Rd- RemitToAddress1
PO BOX 7357: Additional address line.
Austin
TX
30067
UNITED STATES

CLIN / PO Line	Description	Quantity	Unit	Unit Price	Total	Discount %	Discount	Amount
1	Line Item	6	Each	5,000.00		0.00	0.00	30,000.000

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, List of Status Conditions 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, Notes and Attachments).
7. Attachments – Allows for additional attachments to be filed with the invoice (see, Notes and Attachments).

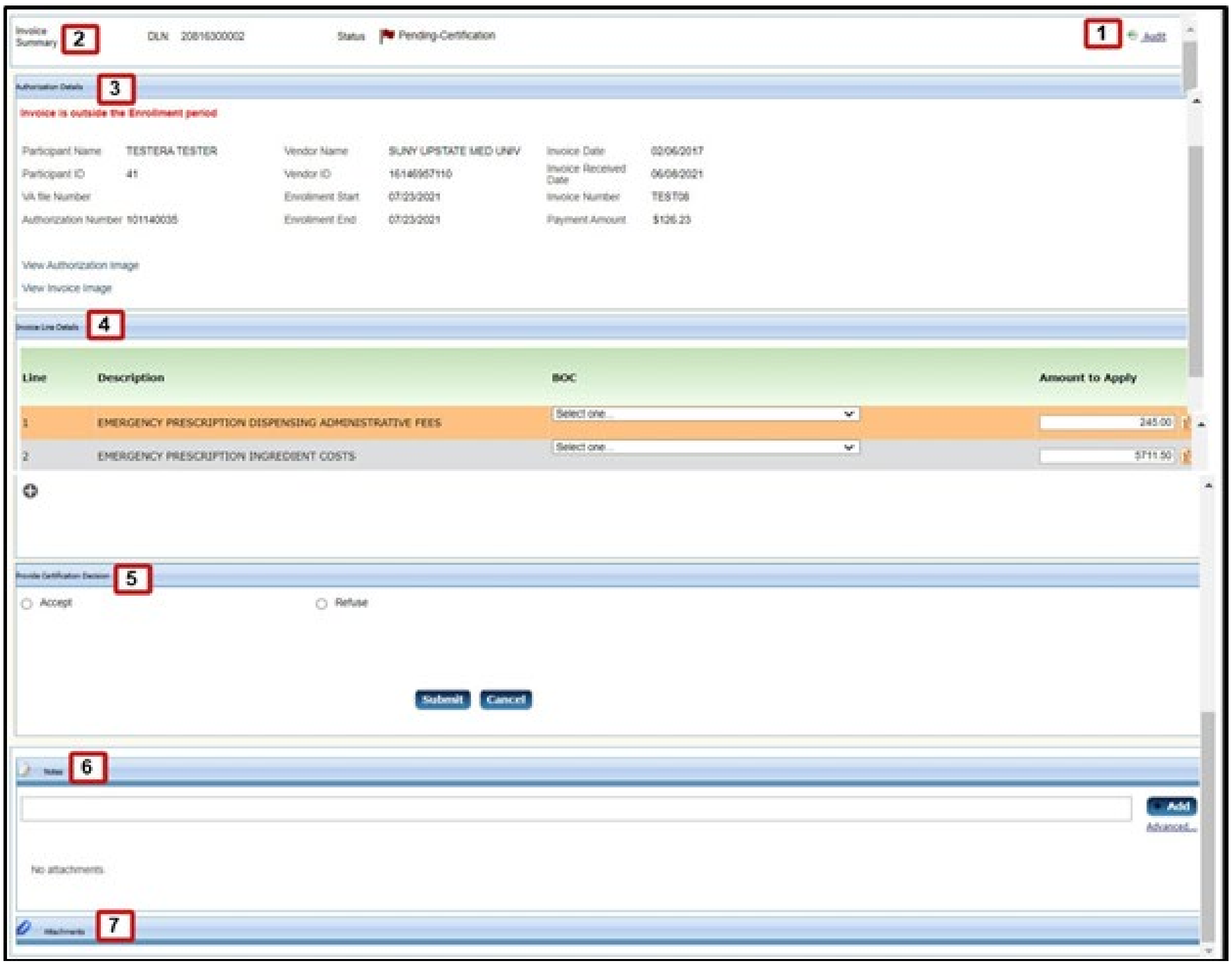


Figure 44: Certification Details Screen

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

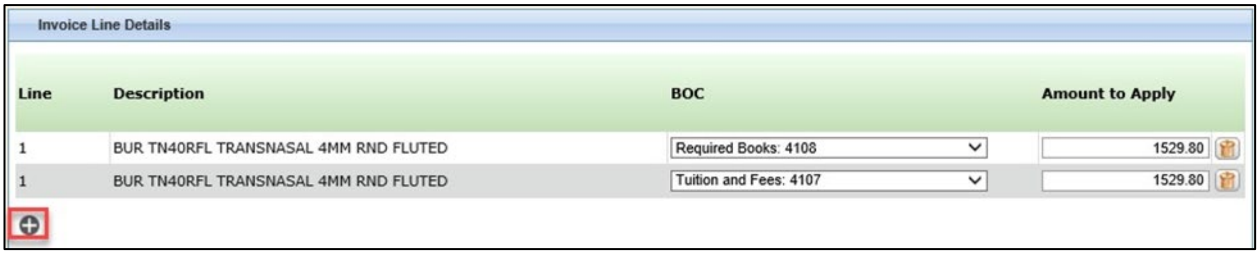


Figure 45: Line Details Plus Sign

- Handling Charges and Mandatory Taxes can be added.

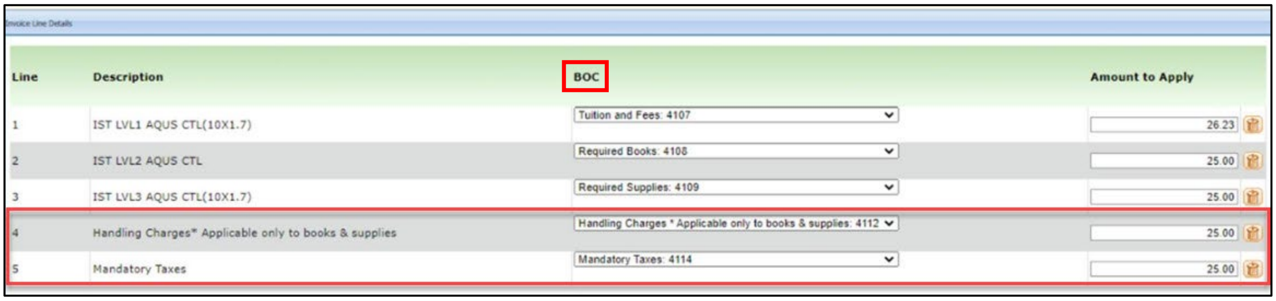


Figure 46: Line Details - Handling Charges and Mandatory Taxes Added

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.

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.

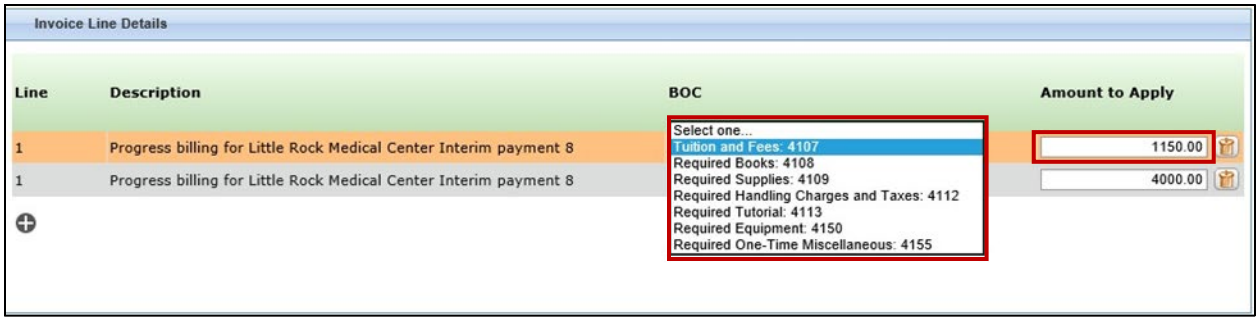


Figure 48: Budget Object Code and Amount Entry

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.

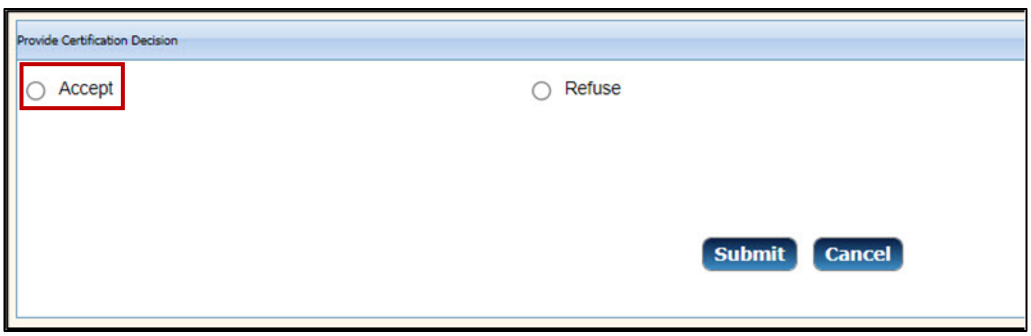


Figure 49: Select Accept in Provide Certification Decision Screen

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.

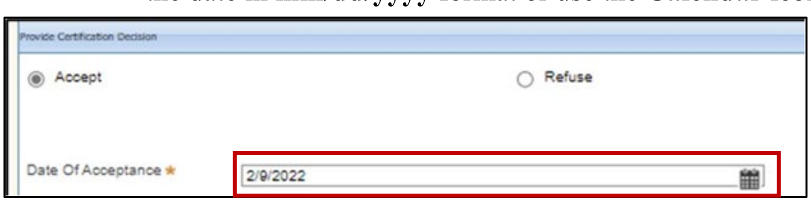


Figure 50: Date of Acceptance Auto Populates or can be Selected

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.

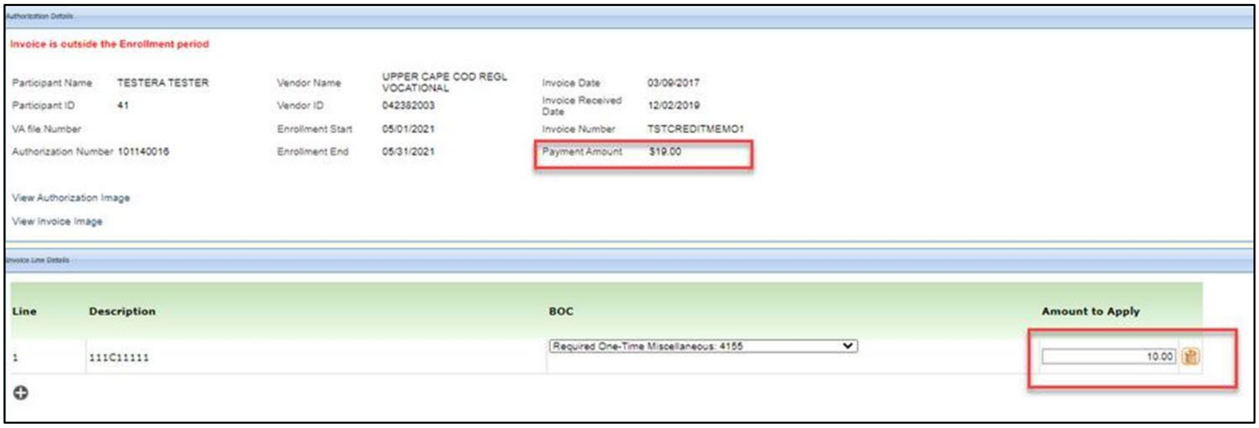


Figure 51: Authorization Details and Invoice Line Details Sections

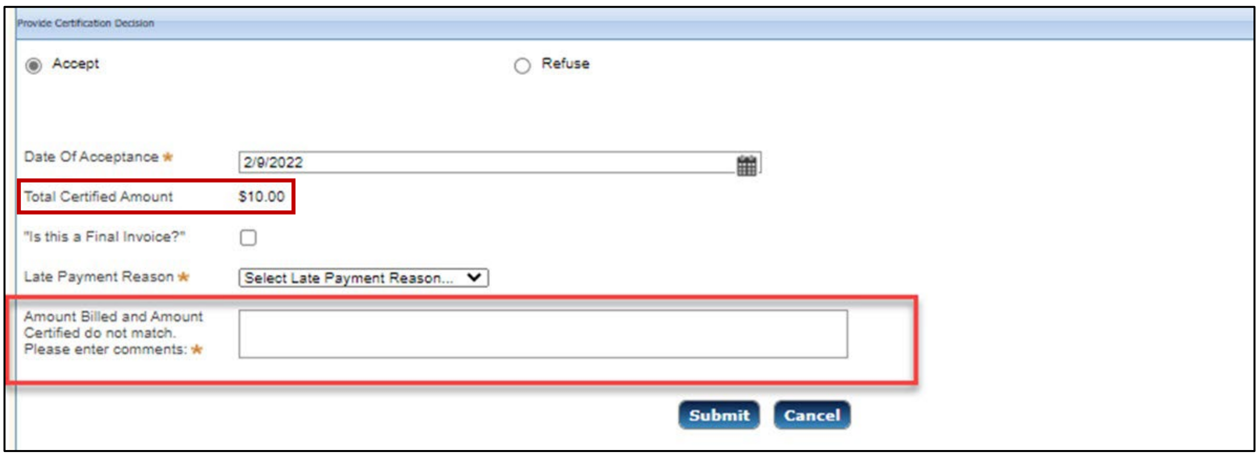


Figure 52: Provide a Reason Why the Certified Amount is less than Payment Amount

- 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.*

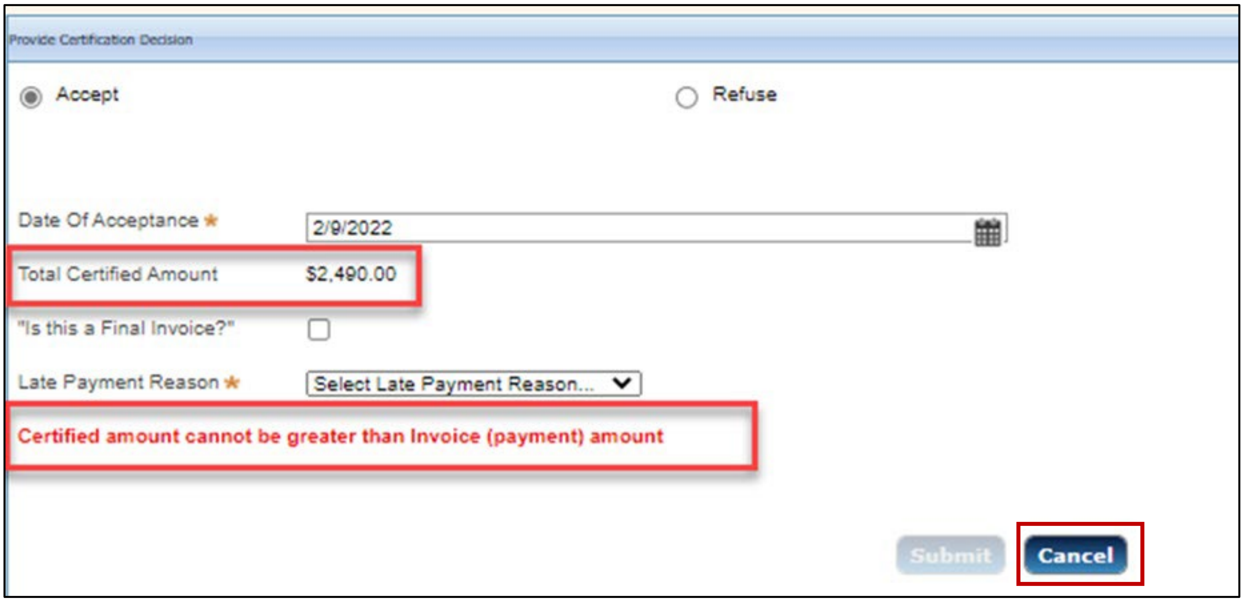


Figure 53: Warning Error Message Certified Amount Cannot Be Greater Than Invoice (Payment) Amount

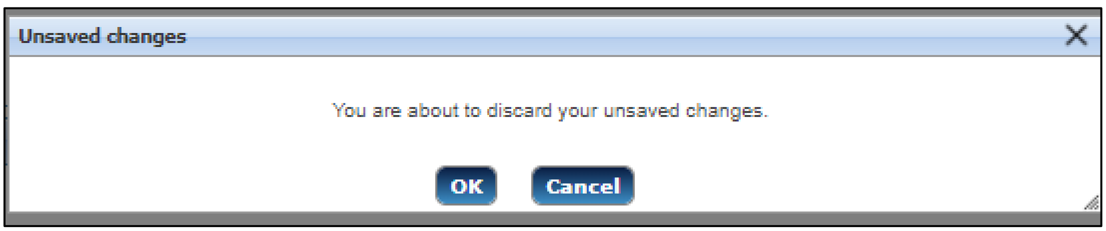


Figure 54: Unsaved Changes Dialog Box

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.

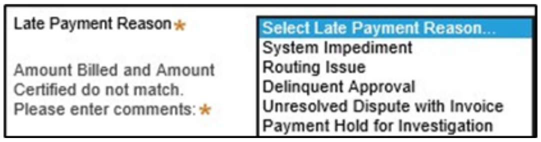


Figure 55: Late Payment Reason

- 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.

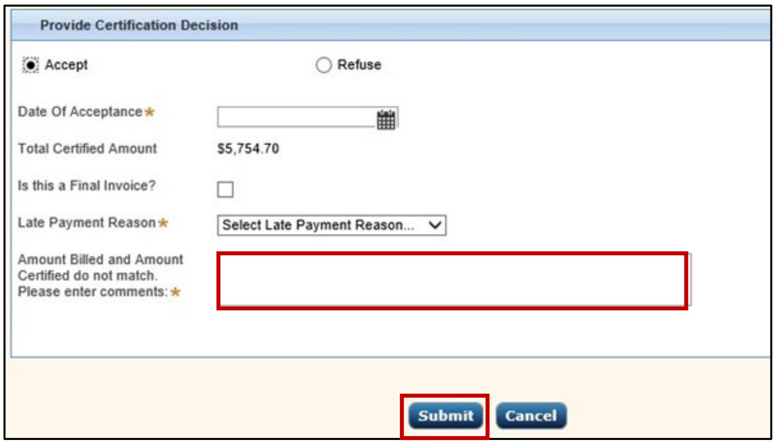


Figure 56: Accepting an Invoice

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

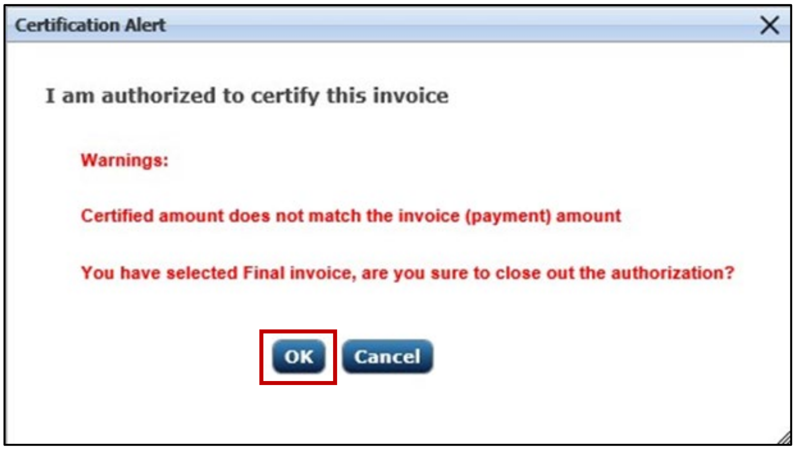


Figure 57: Authorized to Certify

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.

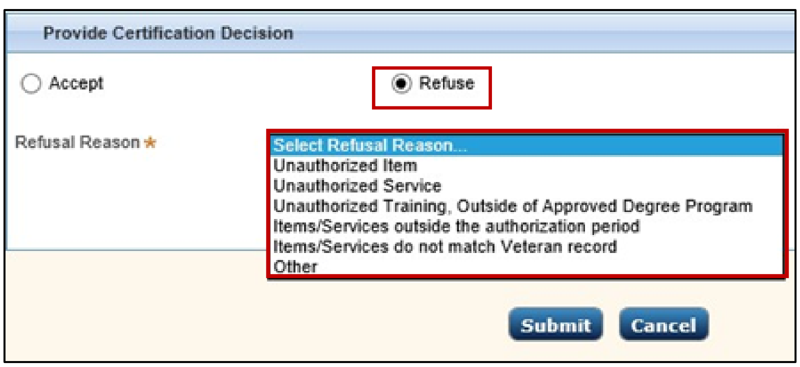


Figure 58: Provide Certification Decision Screen

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.

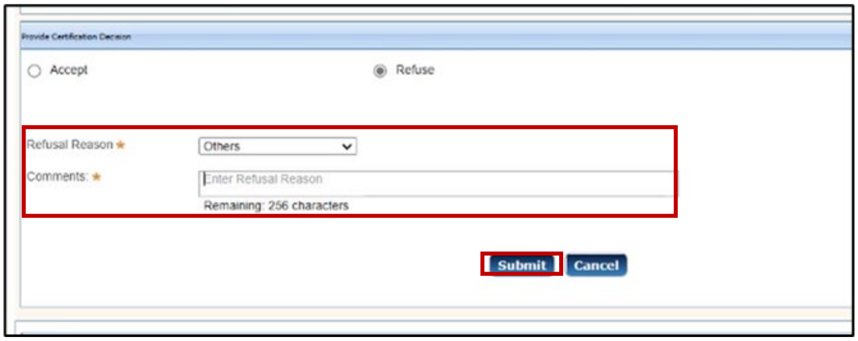


Figure 59: Enter Other Reason in text box

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

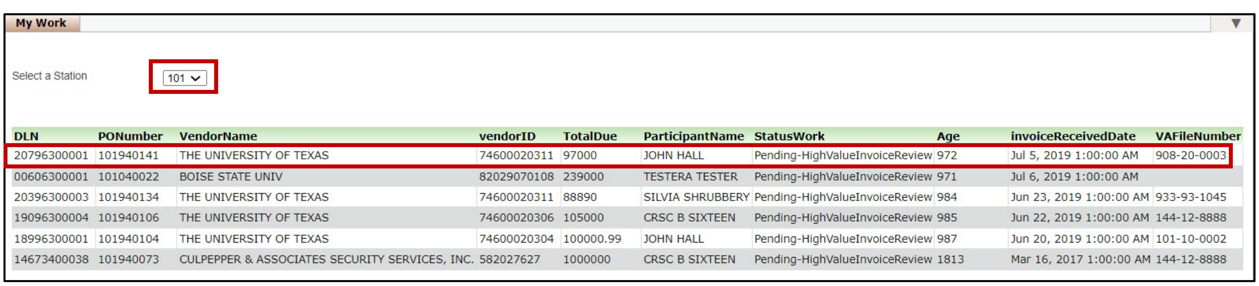
To process high dollar invoices, complete the following:

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 101

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:

1. Audit Link – provides a history of the invoice (see Viewing Audit Information). 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 A List of Status Conditions 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 Notes and Attachments.

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

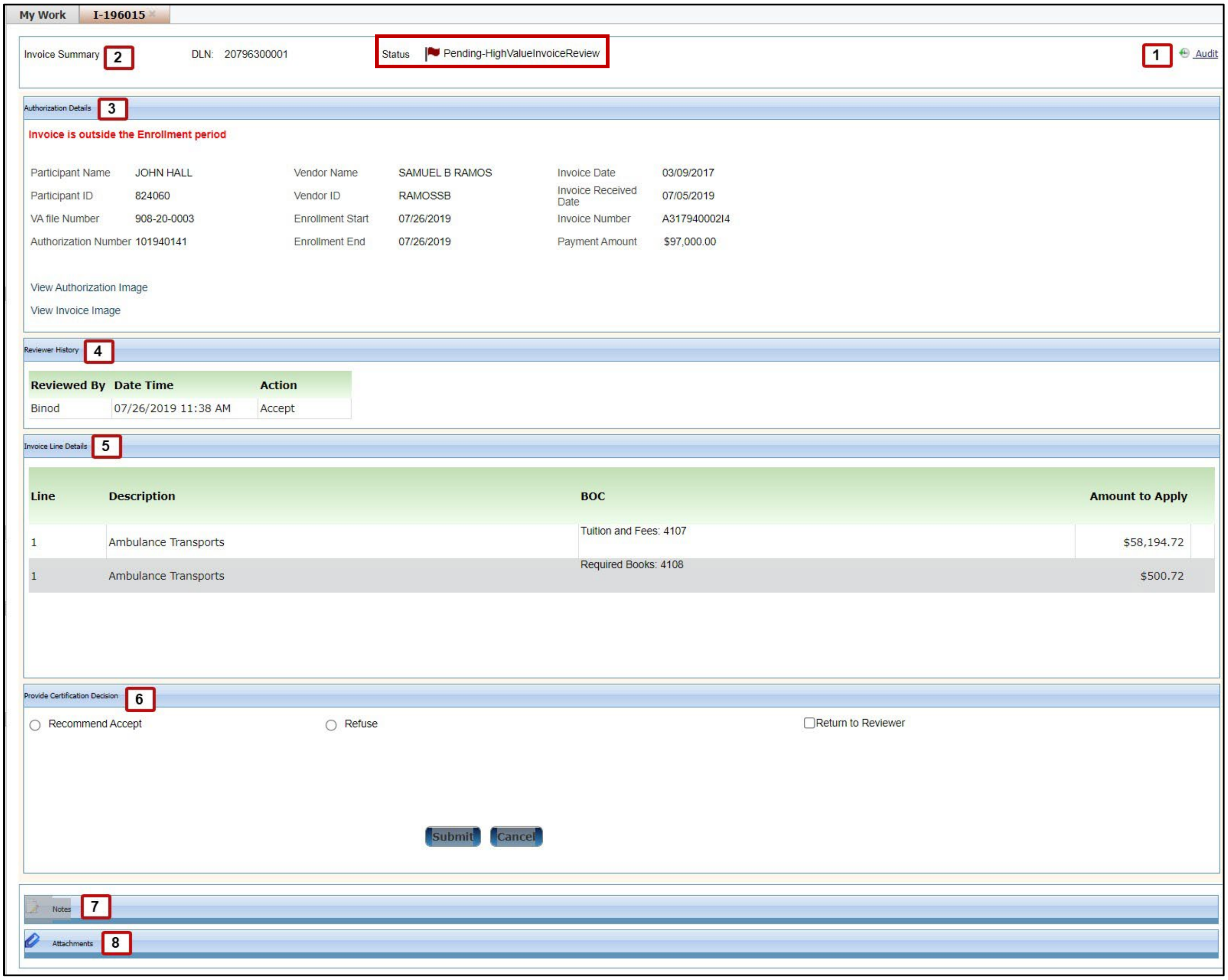


Figure 61: Enter Other Reason in text box

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:

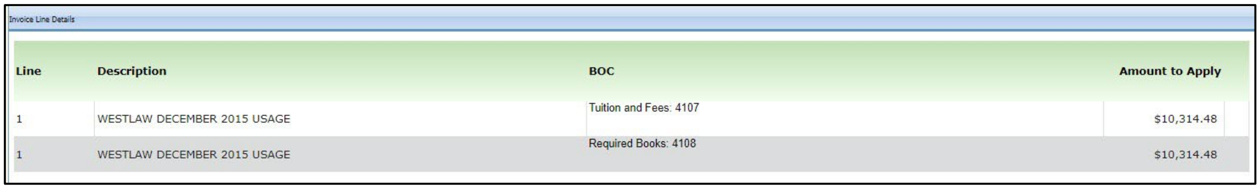
- The invoice must first be recommended for acceptance which sends the invoice upward in the approval chain.
- If the next certifying official does not have authority to approve the dollar amount, they recommend acceptance as well until the invoice finally ends up on the desk of the certifying official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

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 Details

Line	Description	BOC	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.

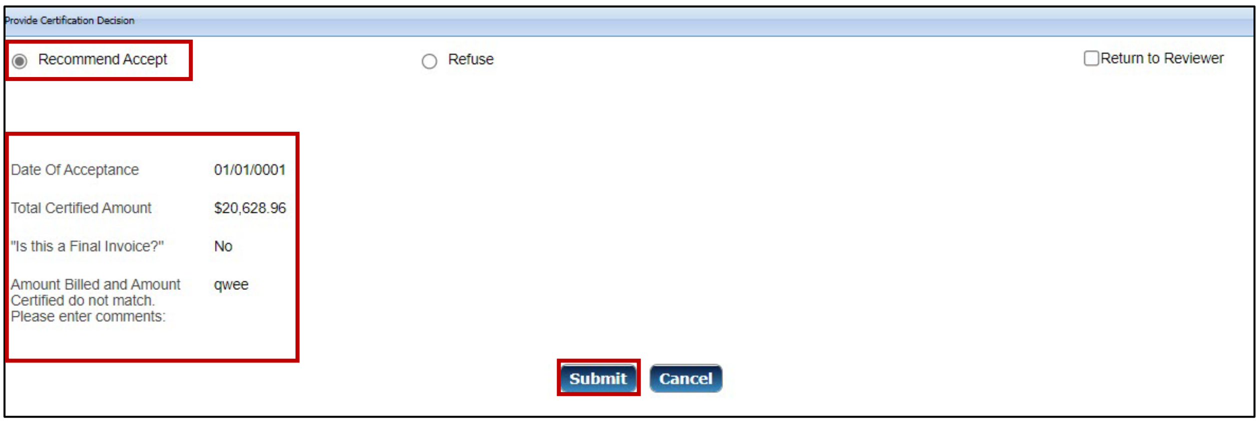


Figure 63: Provide Certification Decision Section of the Certification Details Screen

NOTE: *If changes are required, see [7.3.2.5 Return to Reviewer](#).*

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.

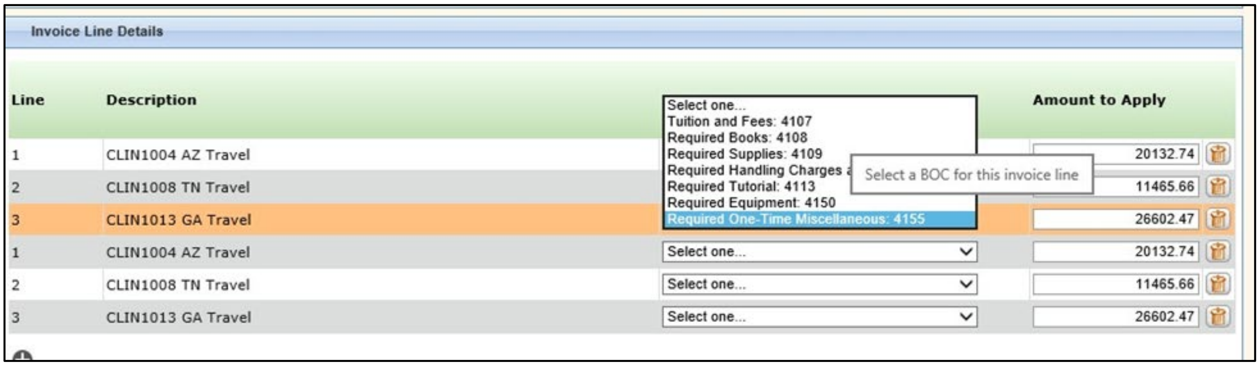


Figure 64: Budget Object Code and Amount Entry section of the Certification Details Screen

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 7.1.3.1 Using the Calendar Tool).
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

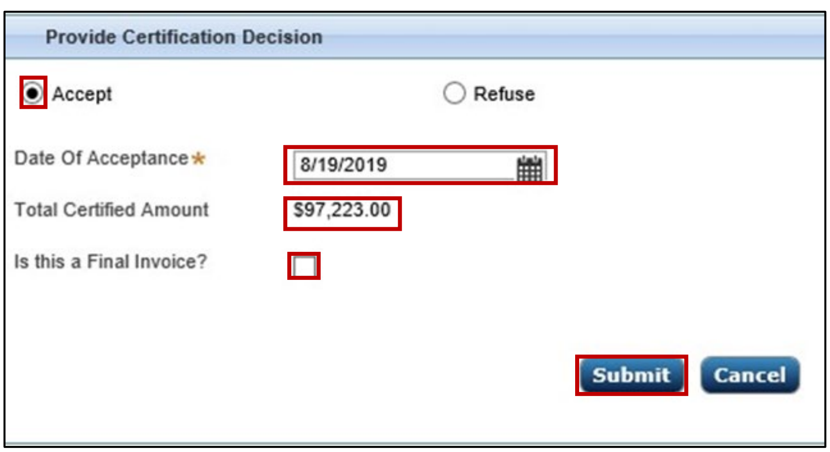


Figure 65: Accepting an Invoice section of the Certification Detail Screen

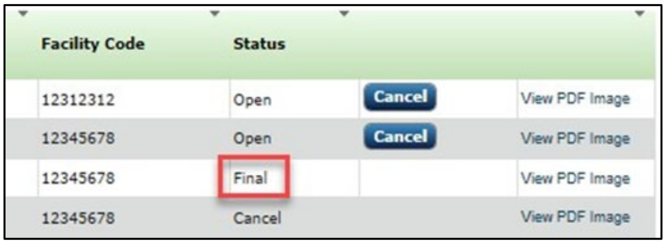


Figure 66: Status of Final shows when My Authorizations is selected

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.

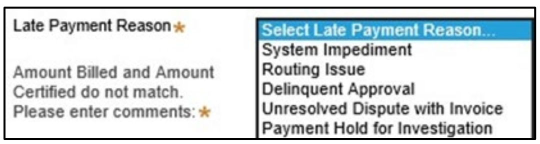


Figure 67: Late Payment Reason dropdown menu

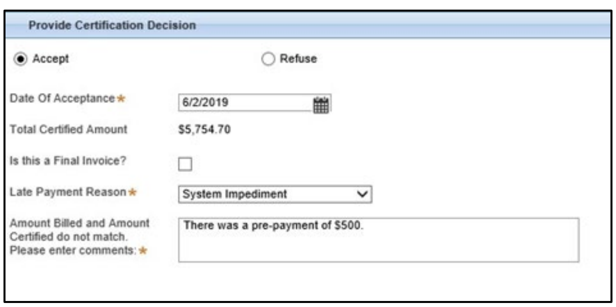


Figure 68: Required Fields Entered

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.*

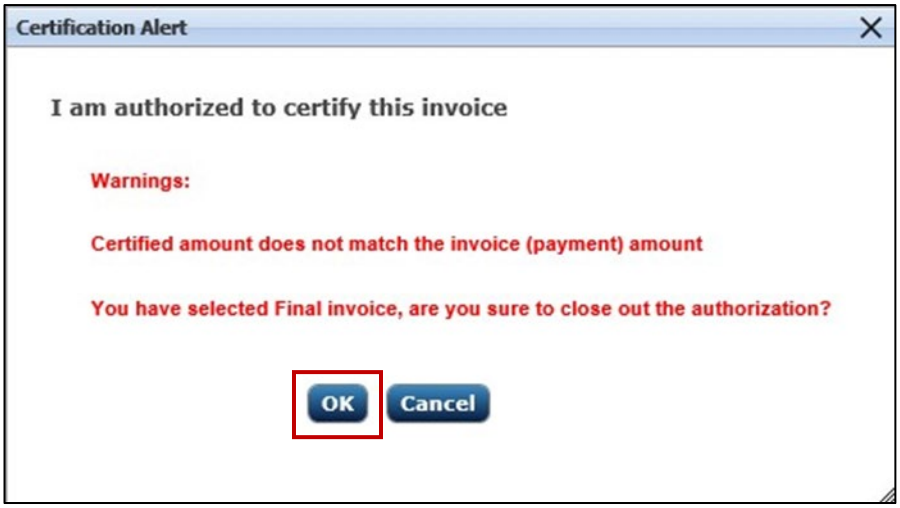


Figure 69: Authorized to Certify

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.

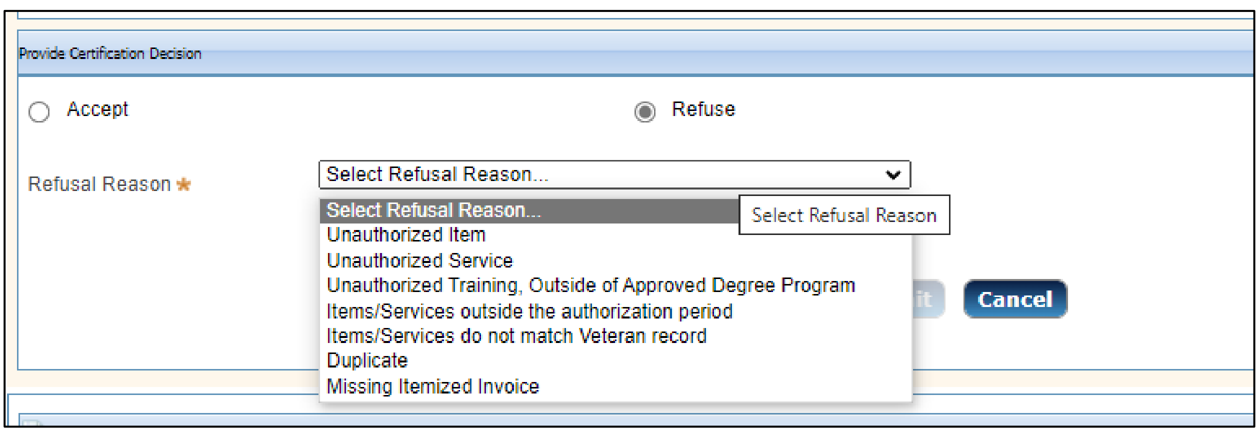


Figure 70: Provide Certification Other Decision Screen

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.

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.

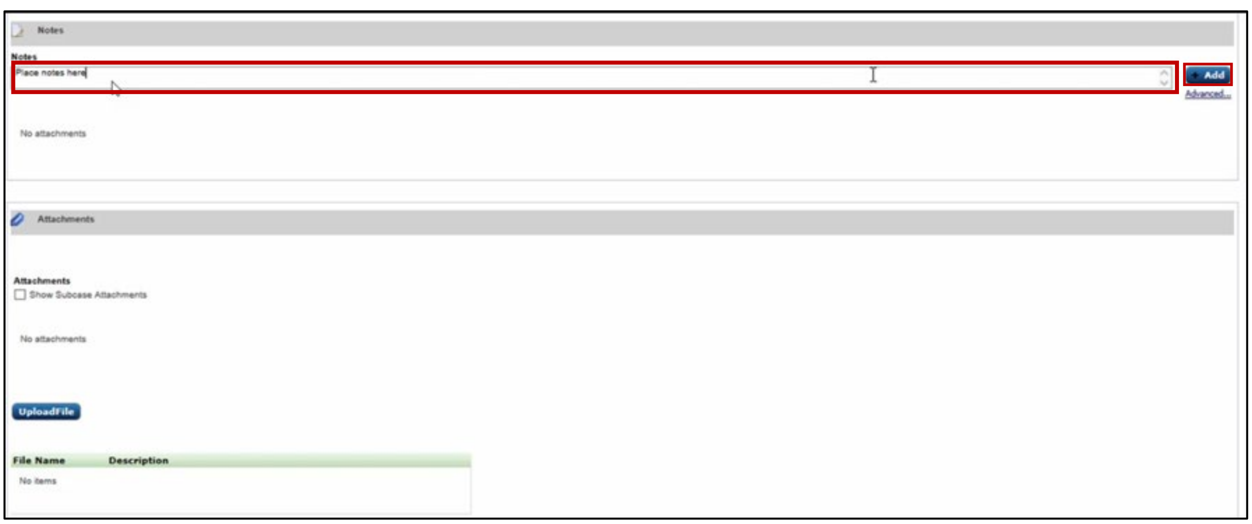


Figure 72: Notes and Attachment section of the Certification Details screen

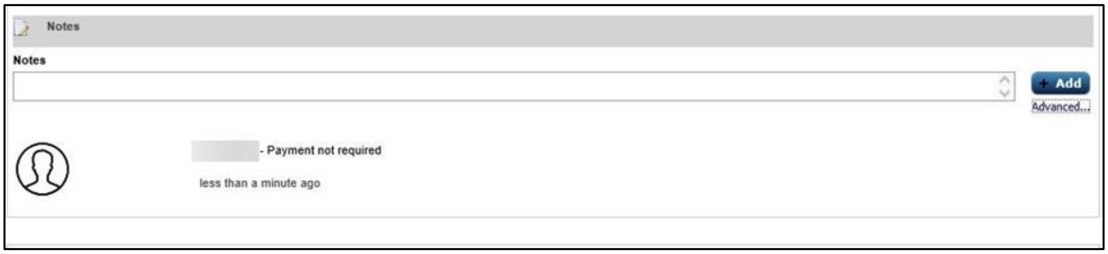


Figure 73: Notes are added to the invoice

Advanced Notes

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

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

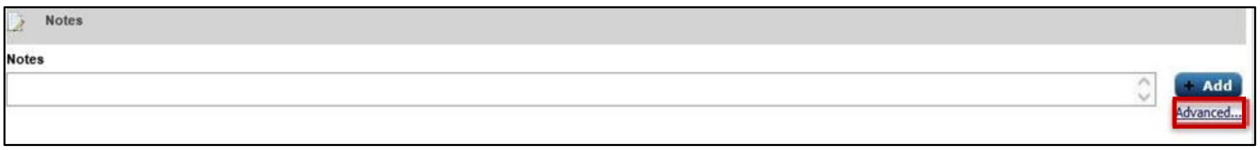


Figure 74: Select Advanced Link to add a subject to your note

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.

Figure 75: Add a Note screen

The note is added to the invoice.

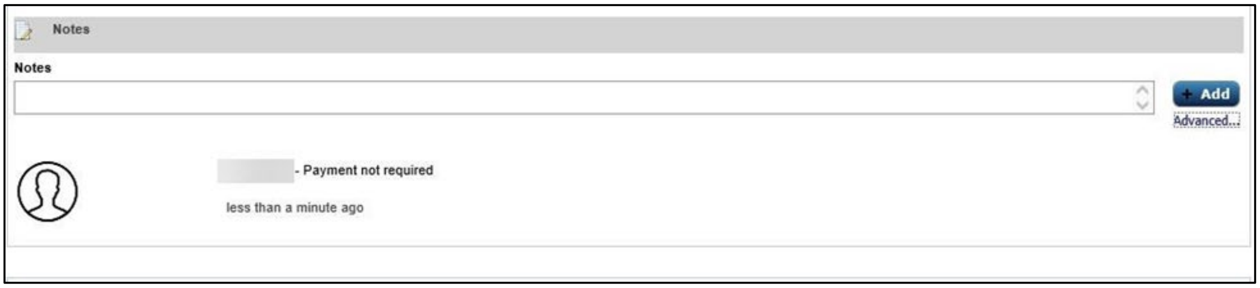


Figure 76: Note added to invoice

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.

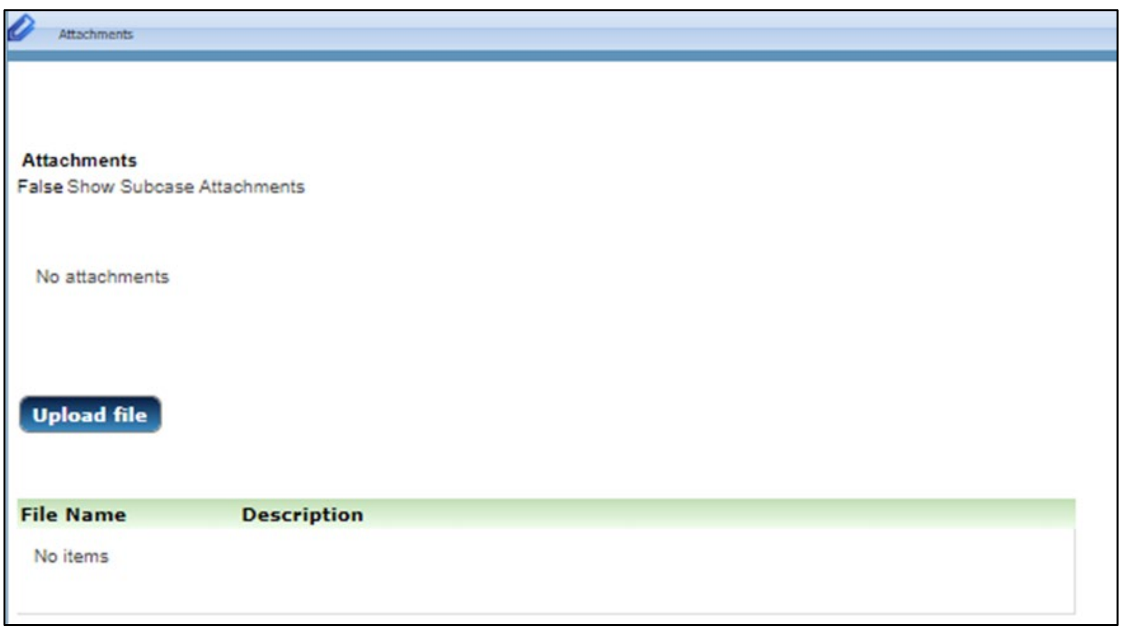


Figure 77: Attachments Section

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.

Figure 78: Audit Link

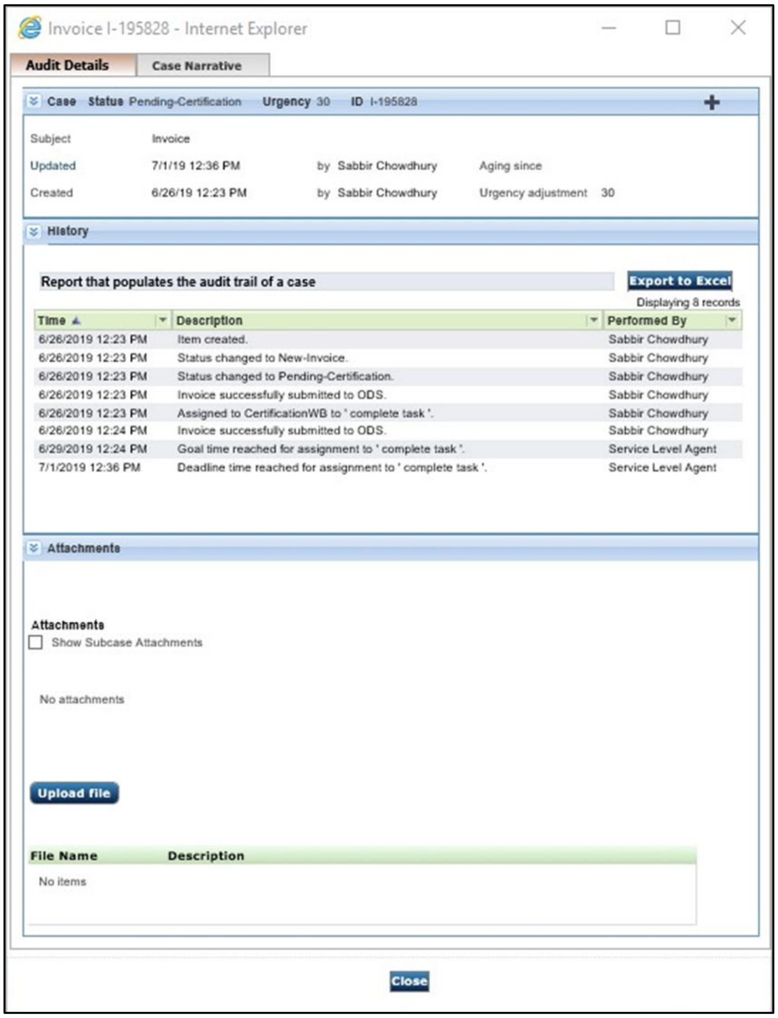


Figure 79: Audit Details View

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.

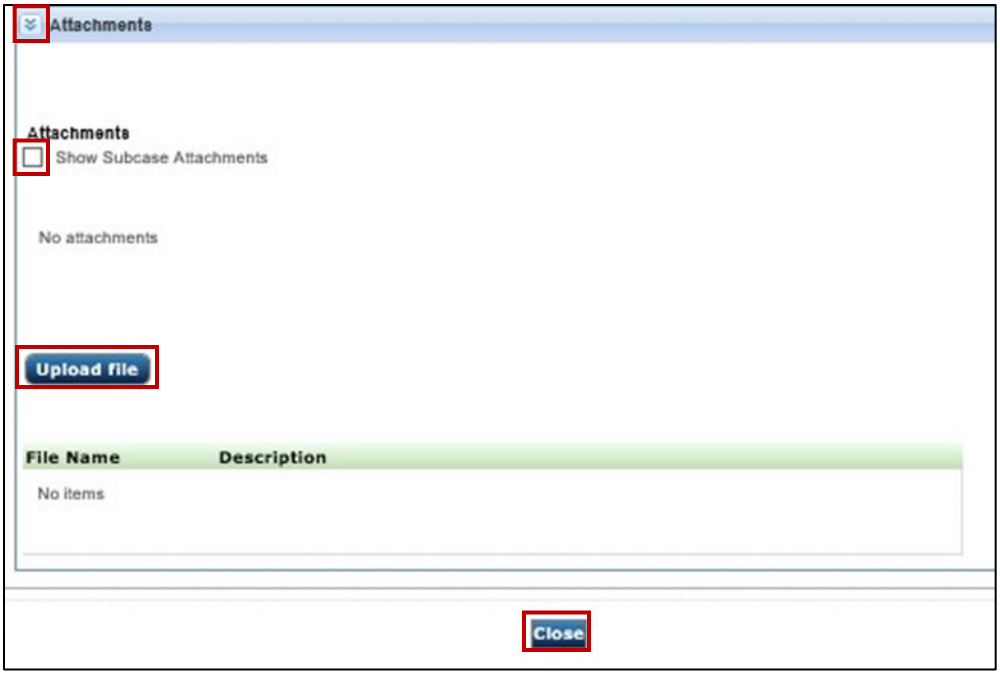


Figure 80: Attachments section

7.5. Viewing Case Narrative

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

1. Select the **Case Narrative** tab

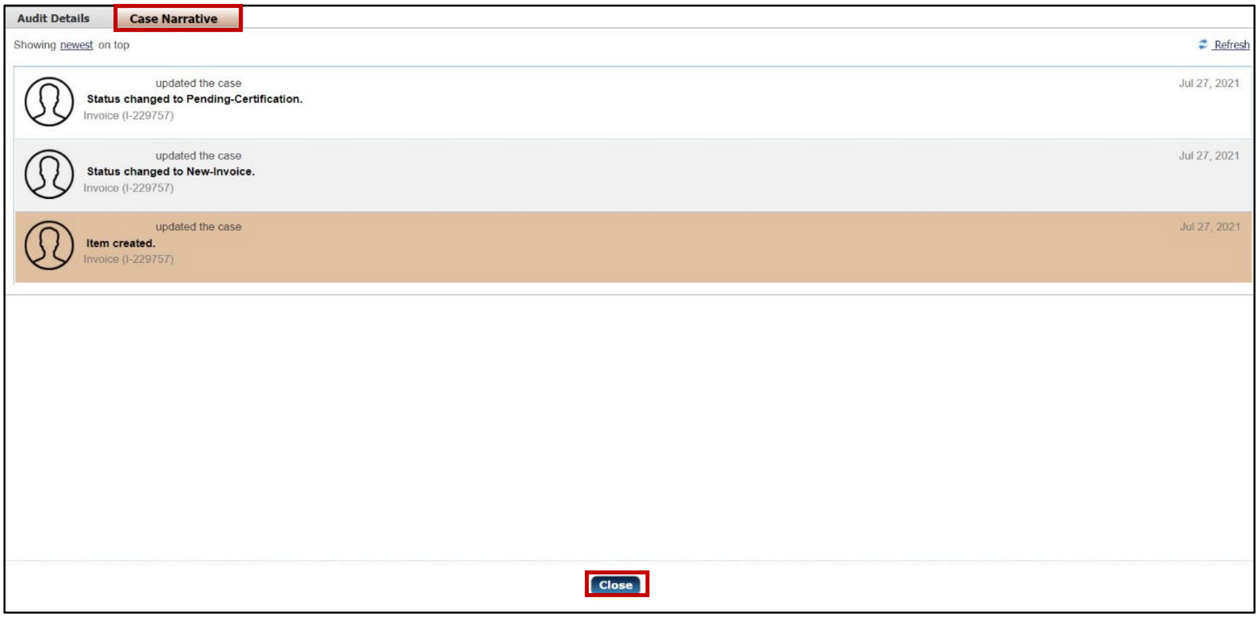


Figure 81: Case Narrative Tab

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.

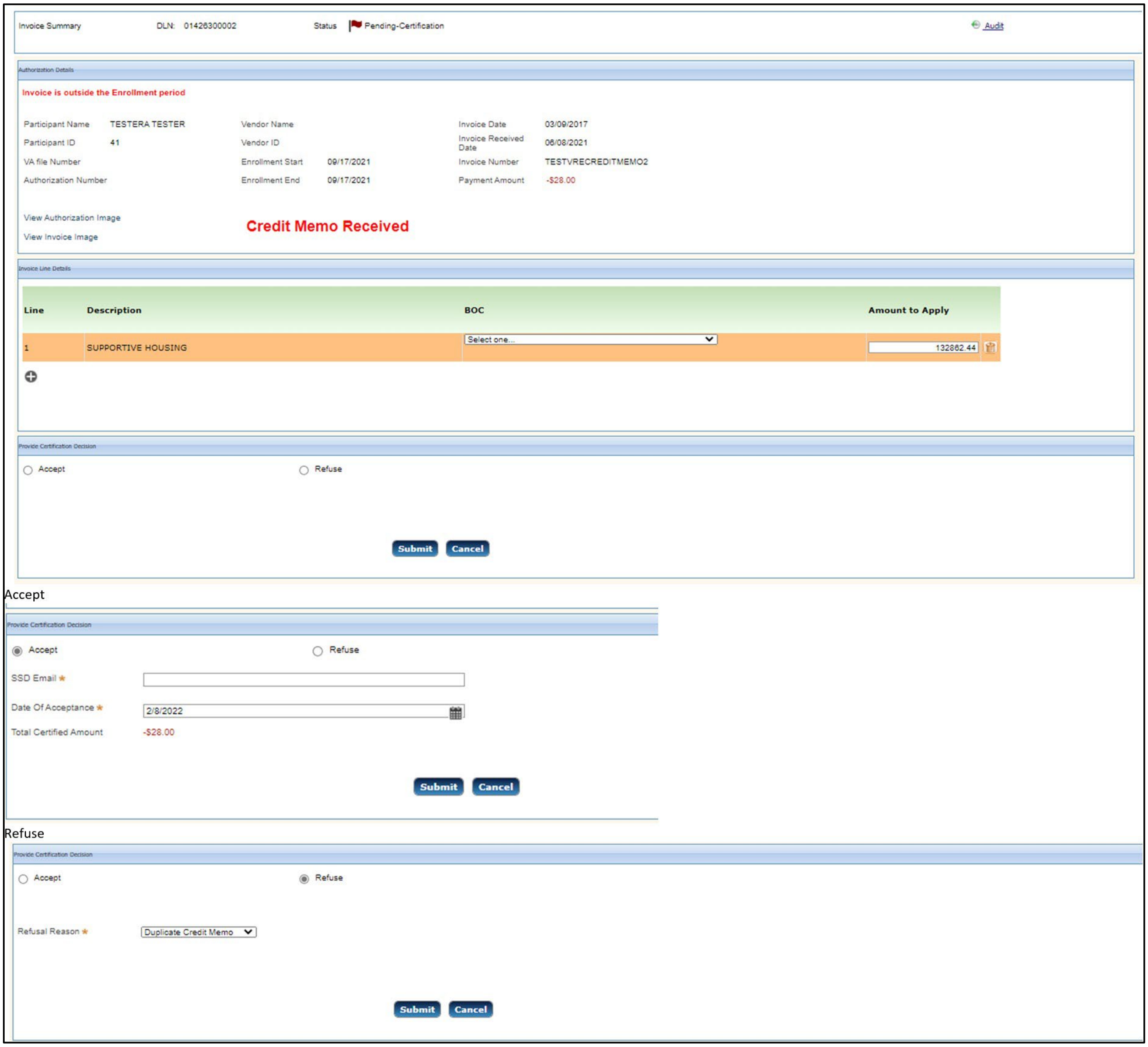


Figure 82: Credit Memo Details Screen without Notes and Attachments Section

NOTE: *For details on the Notes and Attachment sections, see [Notes and Attachments](#).*

NOTE: *For detailed information about the entire Credit Memo Screen refer to [Sections of the Certification Details Screen](#).*

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.

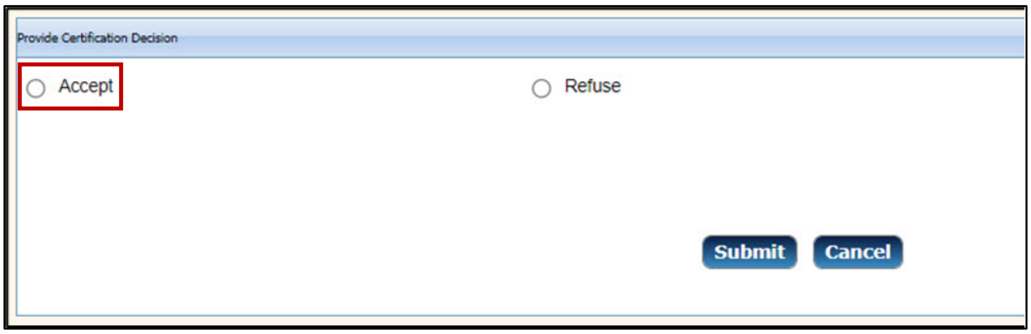


Figure 83: Certification Decision Screen

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.

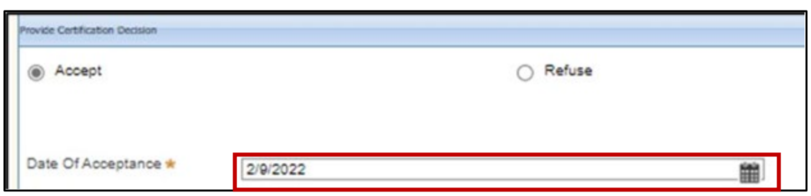


Figure 84: Date of Acceptance Auto Populates or can be Selected

   b. Enter the **Support Services Division (SSD) Email**

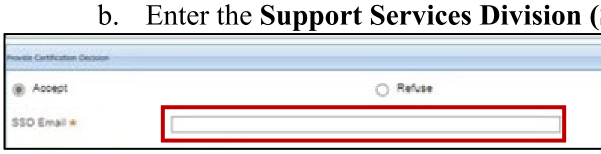


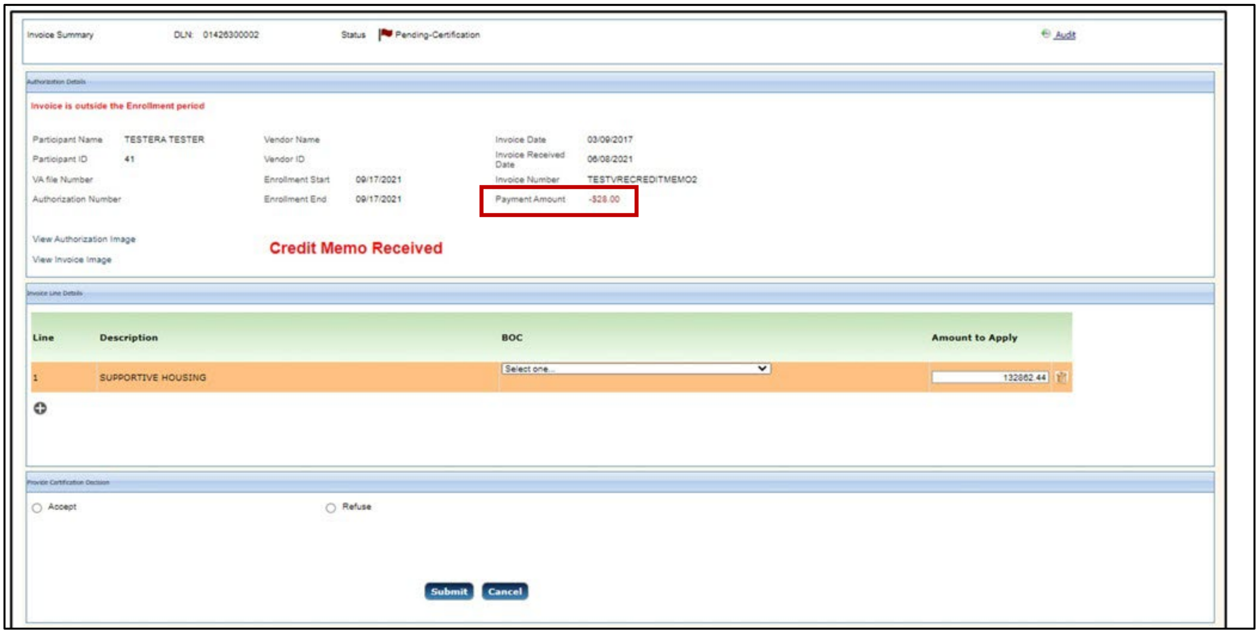
Figure 85: Enter SSD Email

   c. You must verify the **Total Certified Amount** when accepting the invoice. Refer to 7.3.1.3 Section Accepting an Invoice 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.



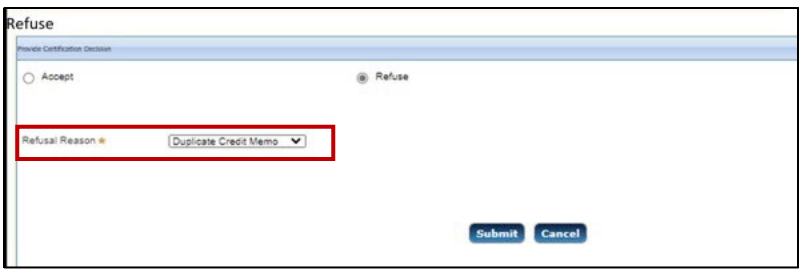


Figure 86: Select Refusal Reason Credit Memo

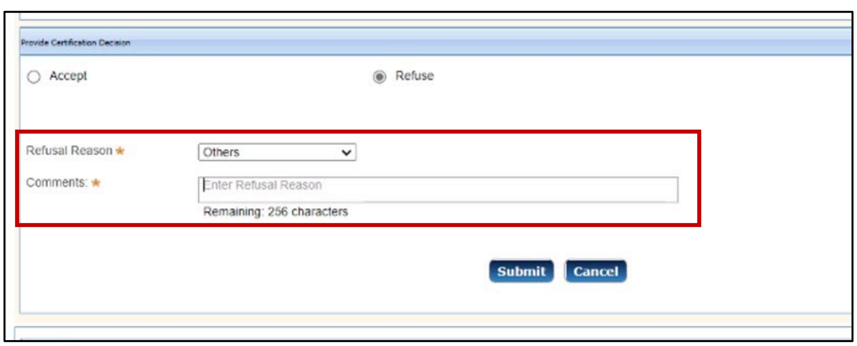


Figure 87: Select Refusal Reason Others includes required Comments

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

Reference DLN: : 01426300002
Authorization Number : 101140036
Vendor Name : DOE FUND INC
Invoice Number : TESTVRECREDITMEMO2

Participant ID : 41

Dear SSD,

Please process credit memo 101140036.
If additional information is needed, contact the assigned VRC.

Regards,
Department of Veterans Affairs
Financial Service Center

This is a system generated 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
    - Station Authorizations
    - iFAMS Station Inquiry System **Note**: For VR&E NC users only
- Monitor Activity

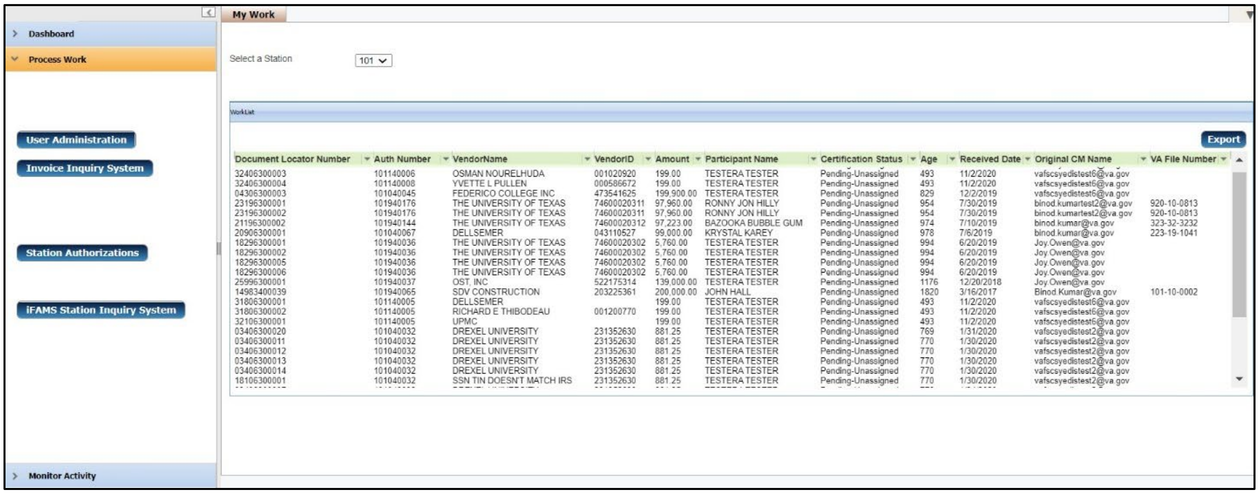


Figure 89: Site Administration Initial Screen

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.

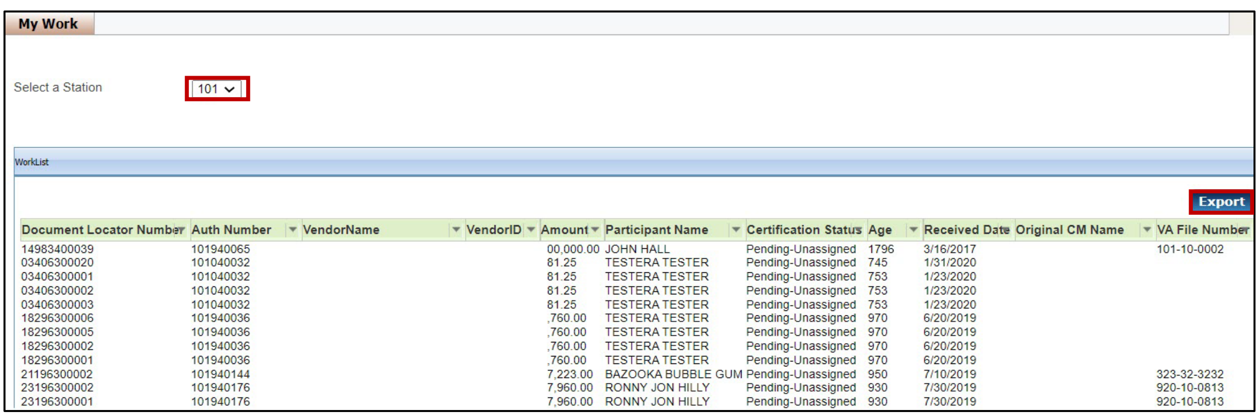


Figure 90: Site Administrator My Work Tab with Unassigned Invoices

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.

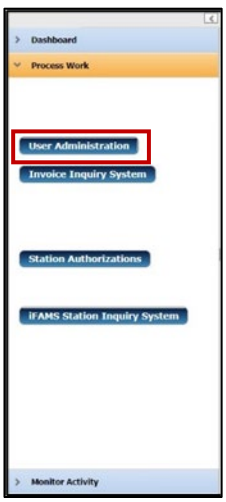


Figure 91: Select User Administration button

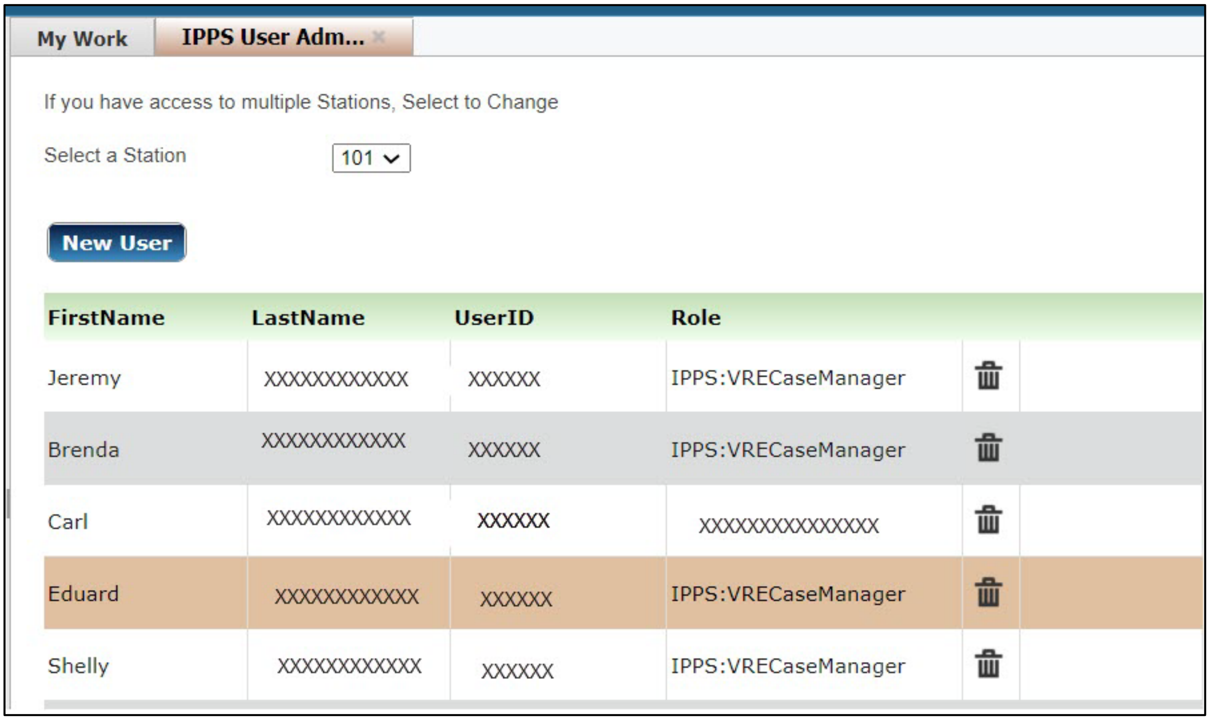


Figure 92: IPPS User Administration Screen

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.

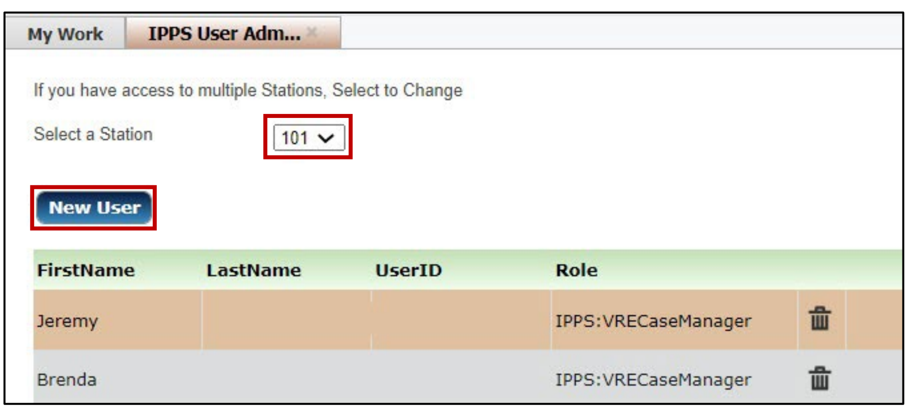


Figure 93: Add a New User

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.

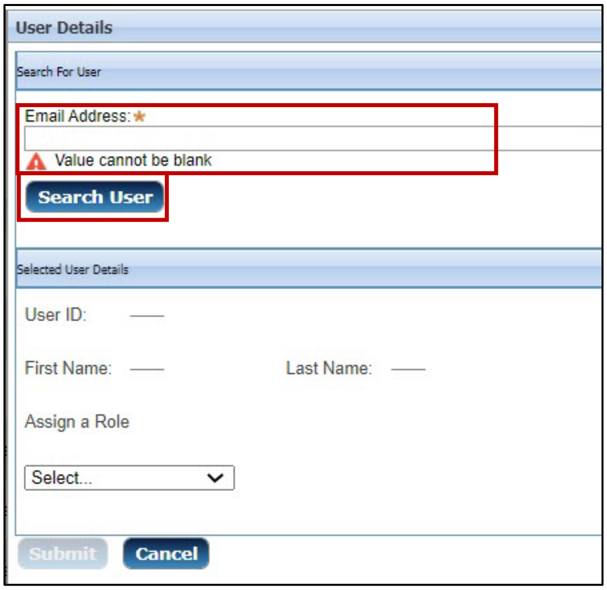


Figure 94: Users Details Window and Search for User

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

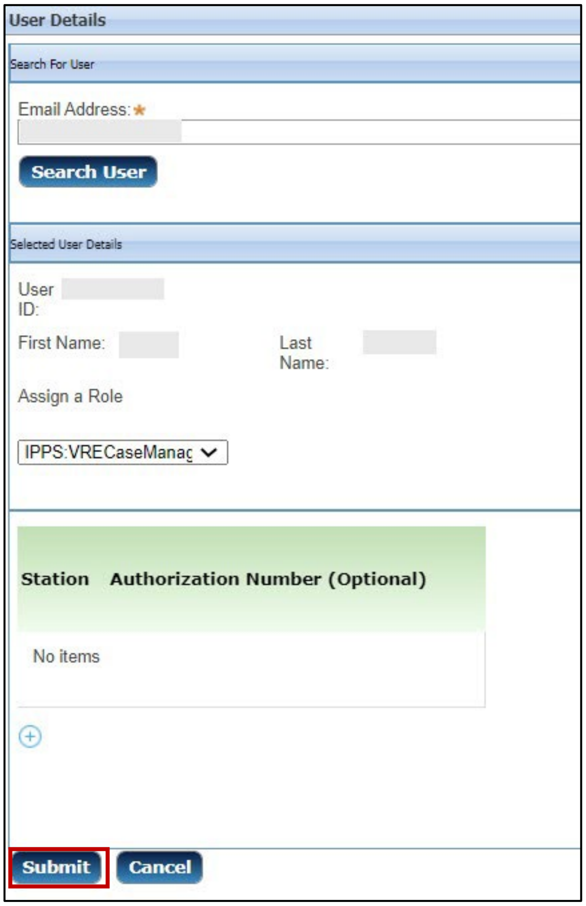


Figure 95: User Information and Authorizations (Listed if assigned to user.)

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.

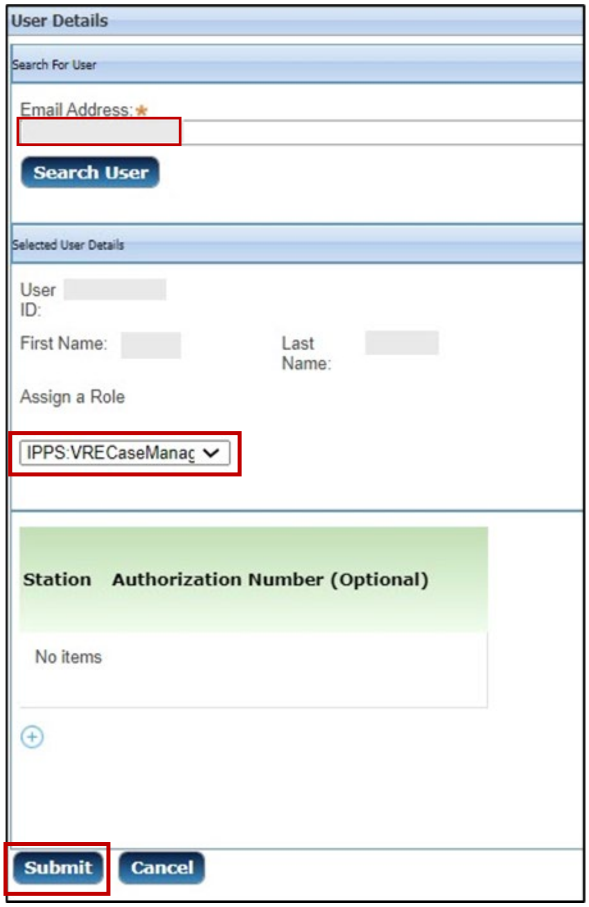


Figure 96: Select the Assign a Role Drop Down Menu

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.*

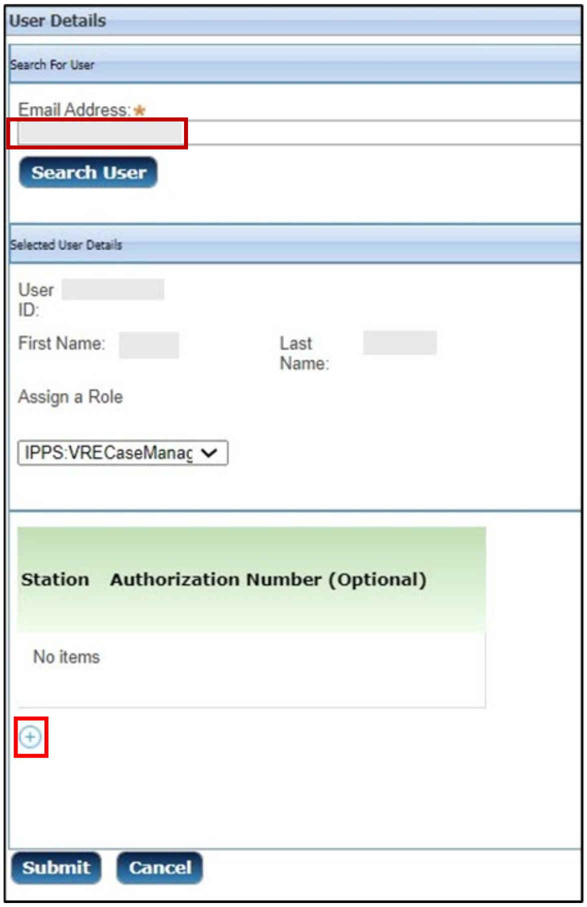


Figure 97: Adding an Authorization

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.

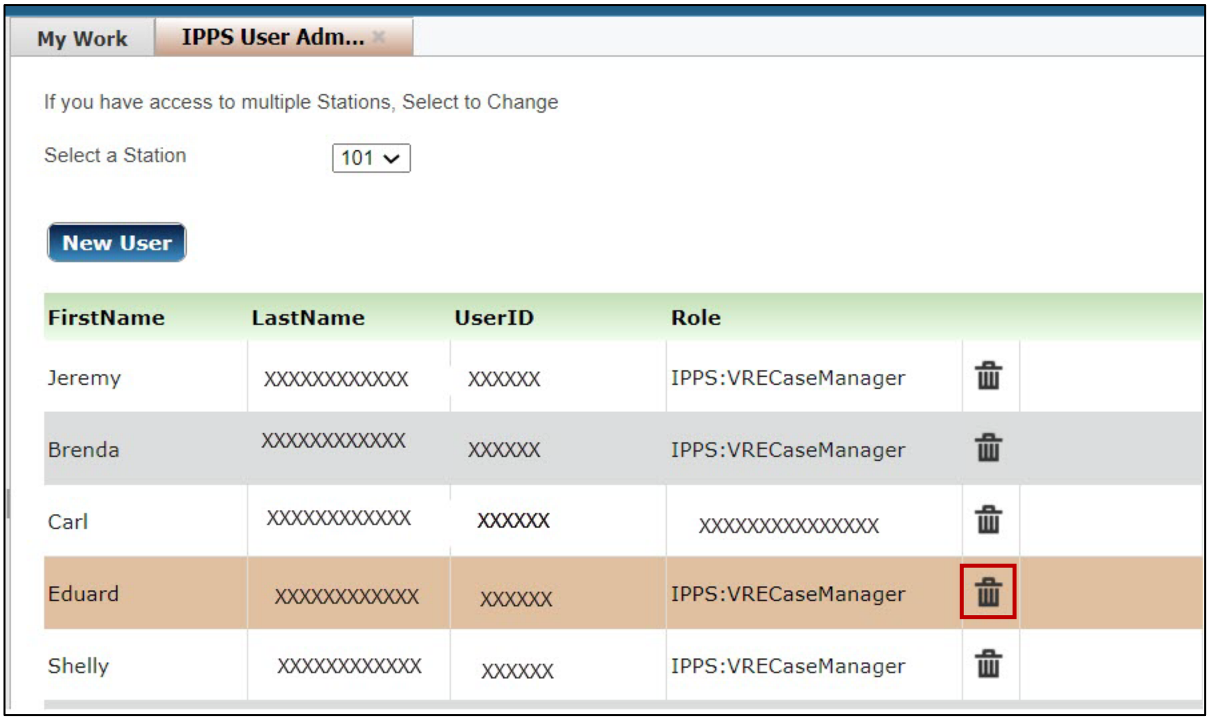


Figure 98: IPPS User Administration Screen

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.

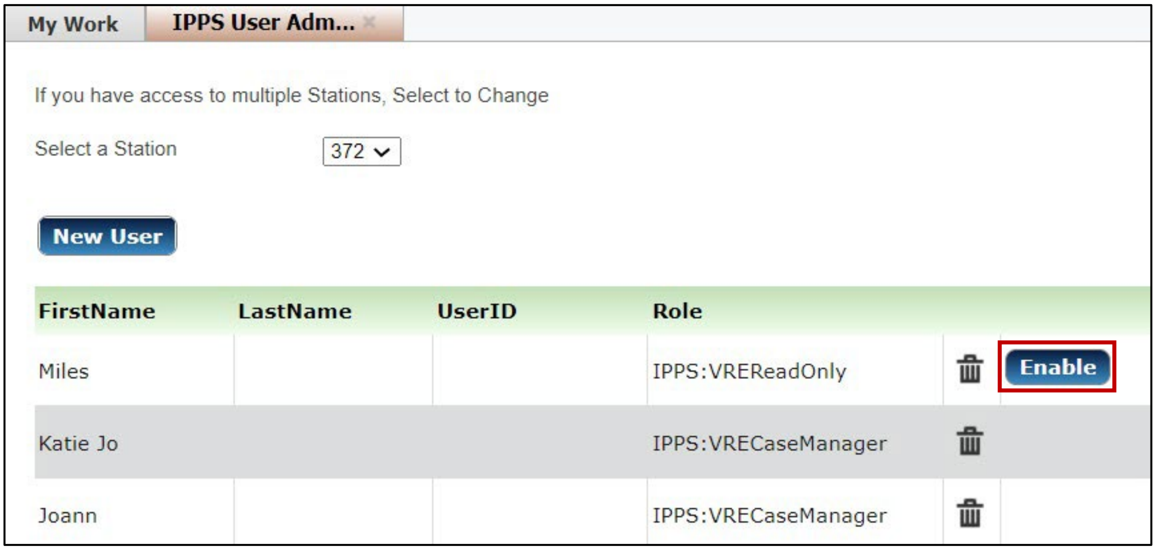


Figure 100: Reactivate a User with the Enable button

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.

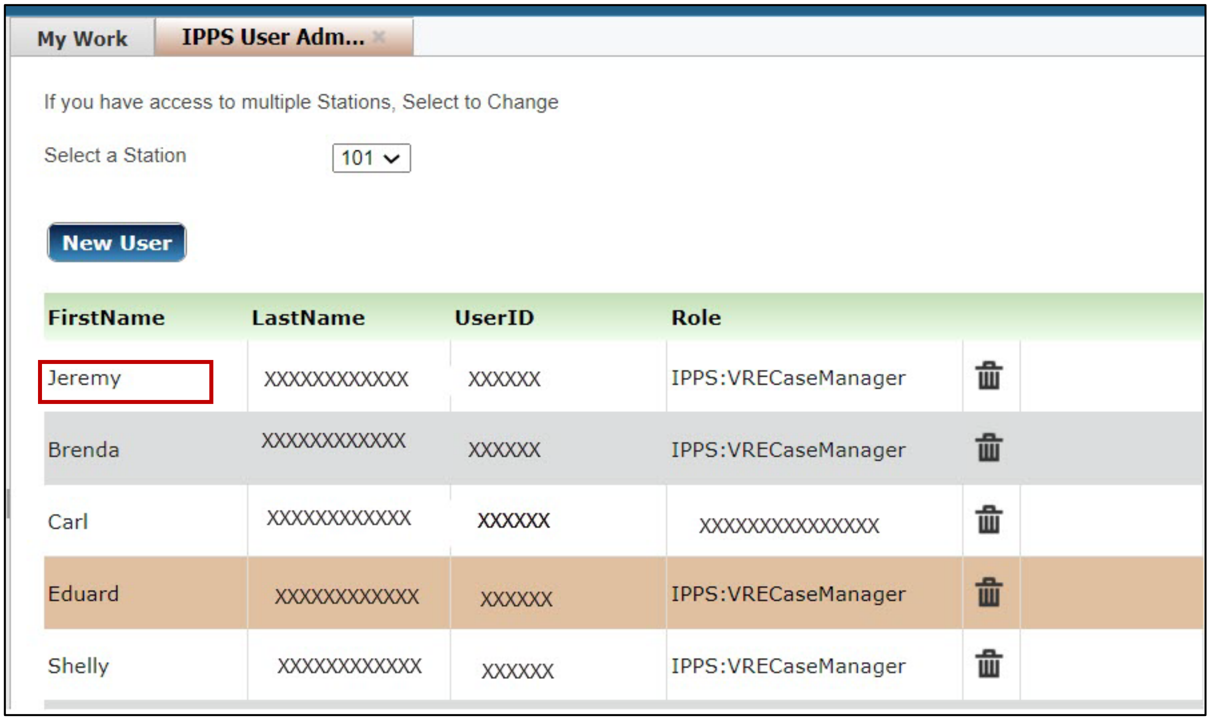


Figure 101: IPPS User Admin Screen

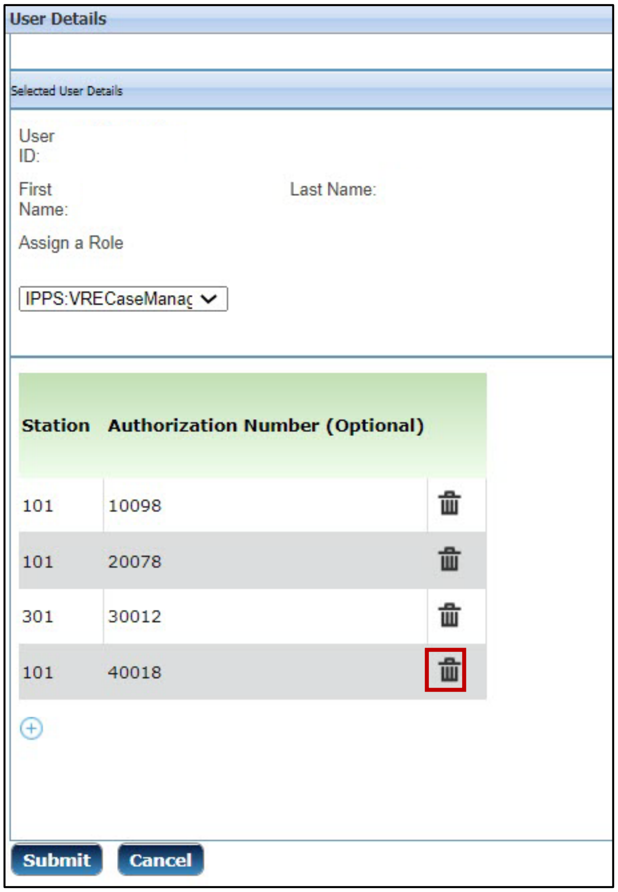


Figure 102: User Details and Remove an Authorization

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.

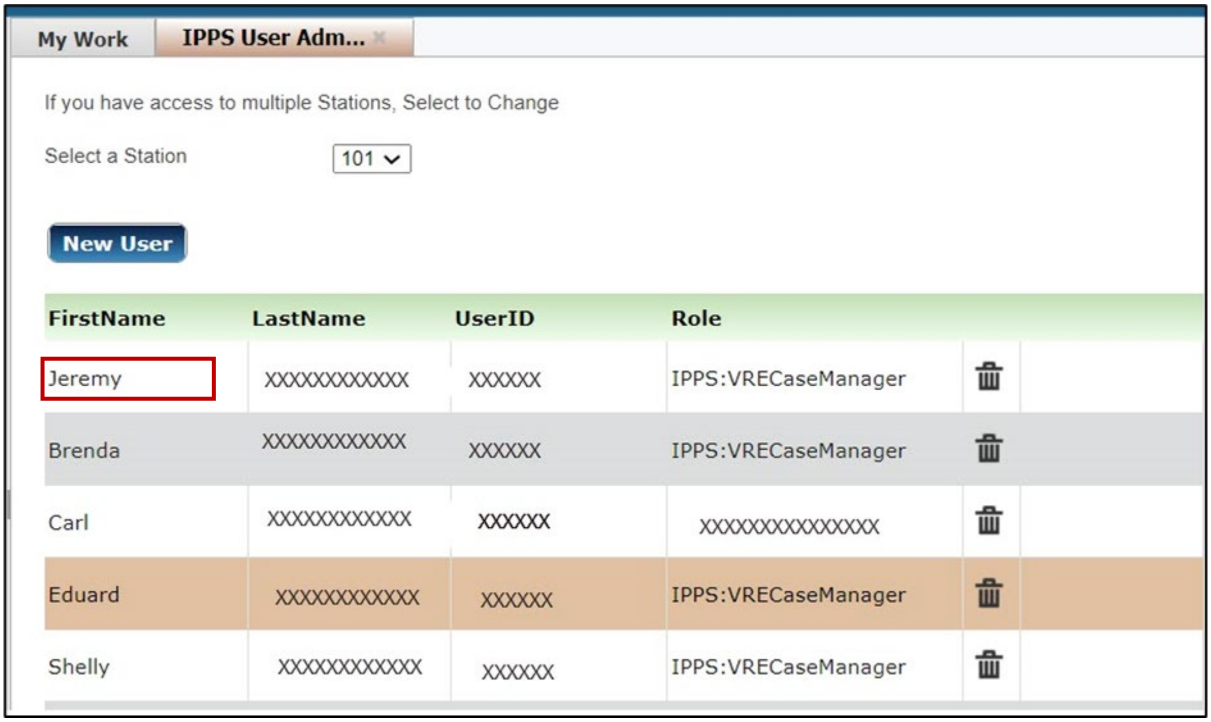


Figure 103: IPPS User Admin Screen

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.

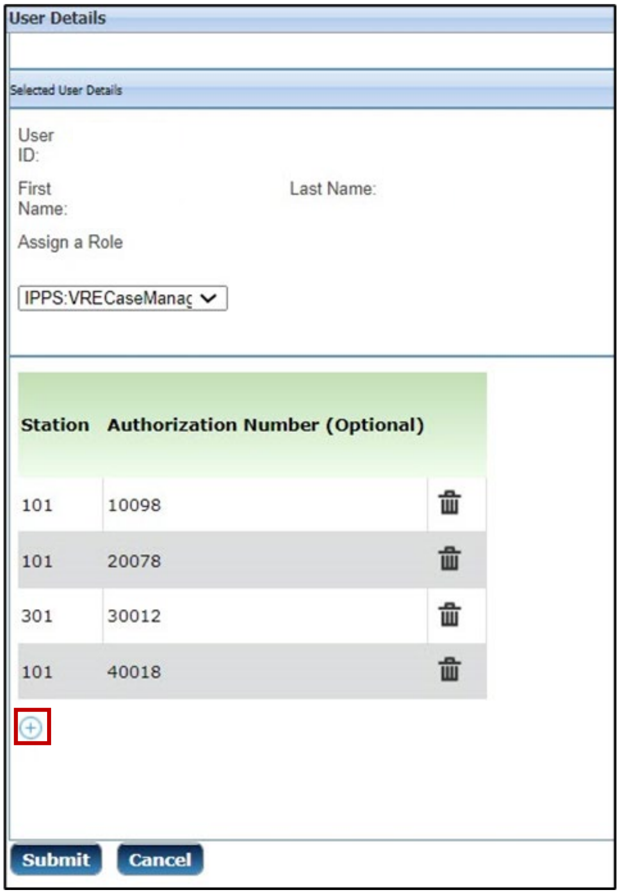
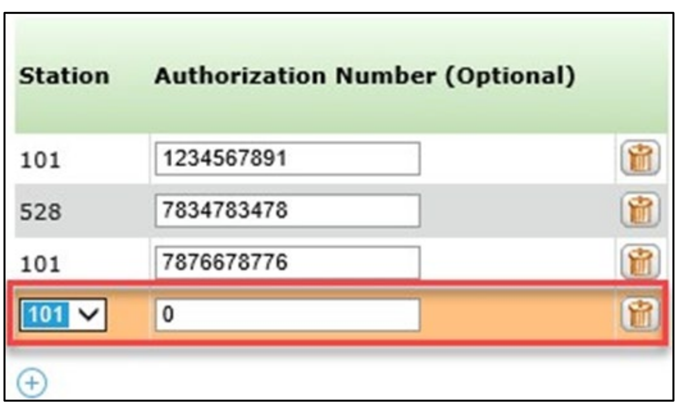


Figure 104: Select Plus Sign to Add an Authorization

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



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.

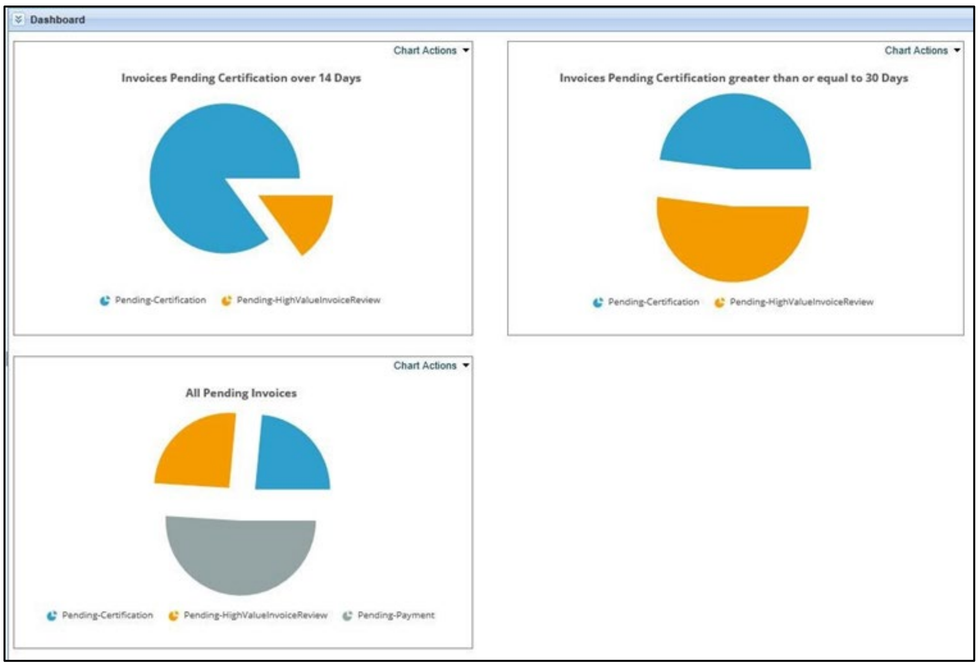


Figure 105: Dashboards

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

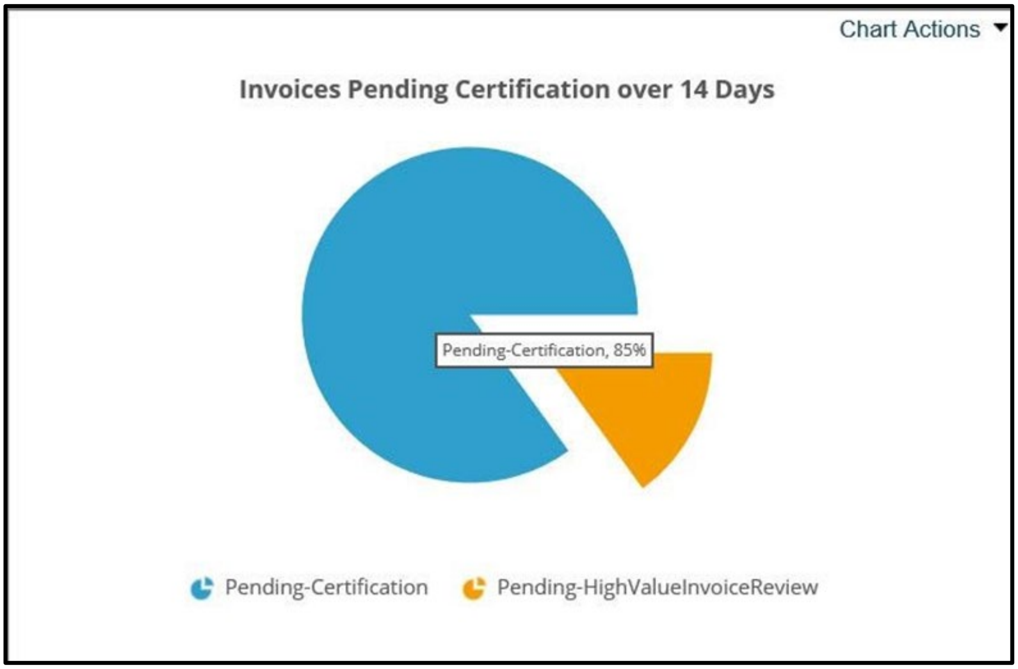


Figure 106: Example of Percentage of Invoices in that category

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.

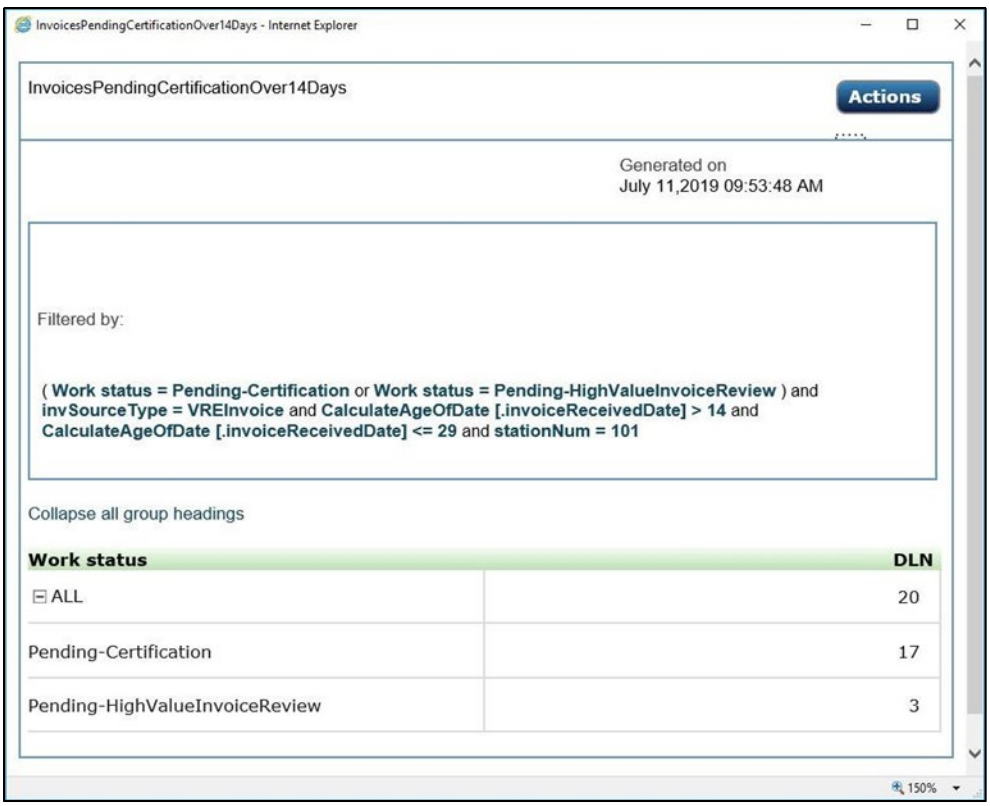


Figure 108: Show Data Fields

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).*

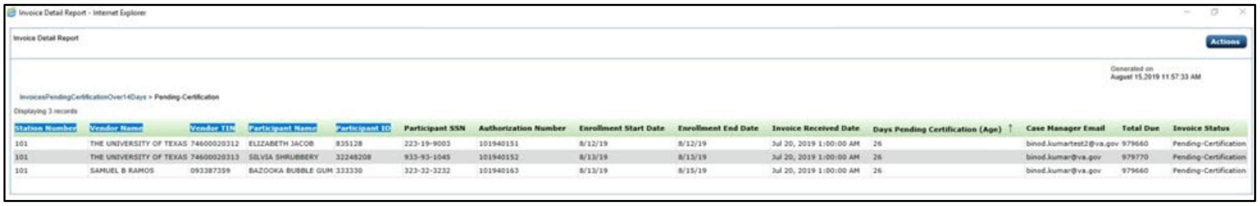


Figure 109: Drill Down Report

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.

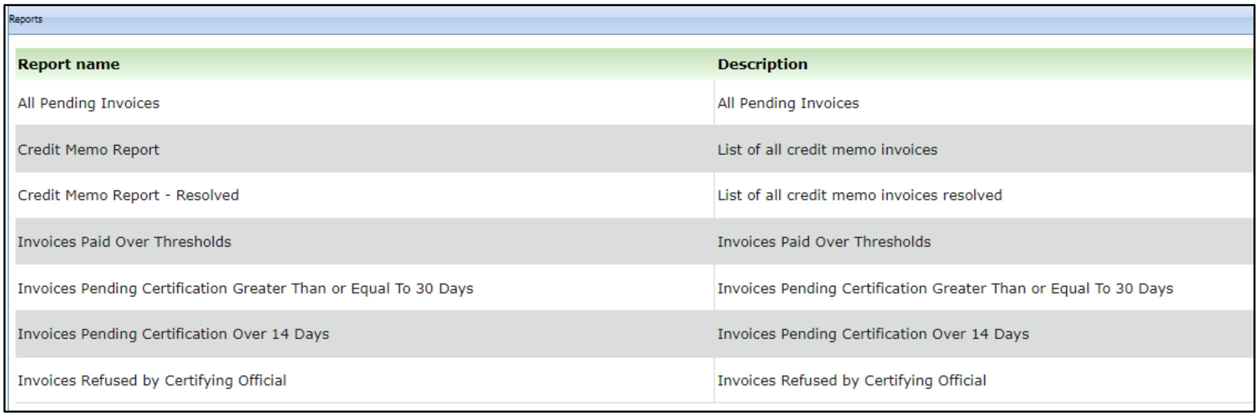
NOTE: *Results are filtered to the station(s) the user has access to.*

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).*

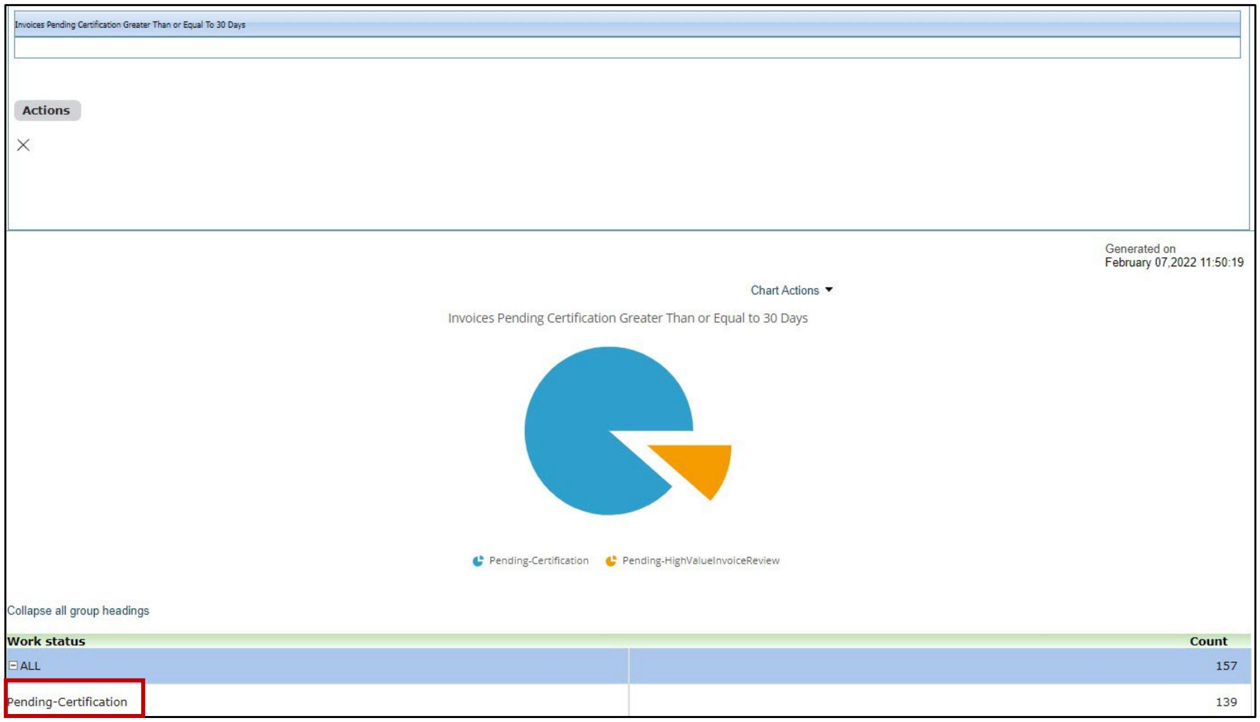


Figure 111: Sample Report

NOTE: *To view a larger image in PDF format, select* ***Zoom***

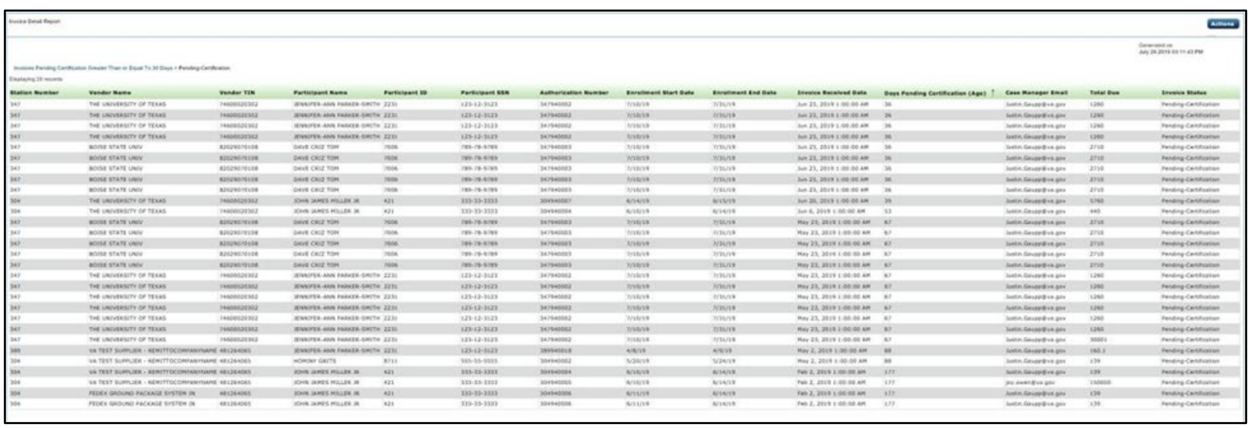


Figure 112: Detailed Report

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.

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.

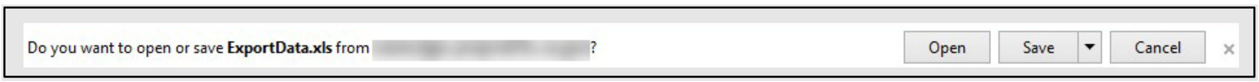


Figure 114: Open or Save

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 https://vaww.ipps.fsc.va.gov/prweb/PRWebLDAP1/
   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

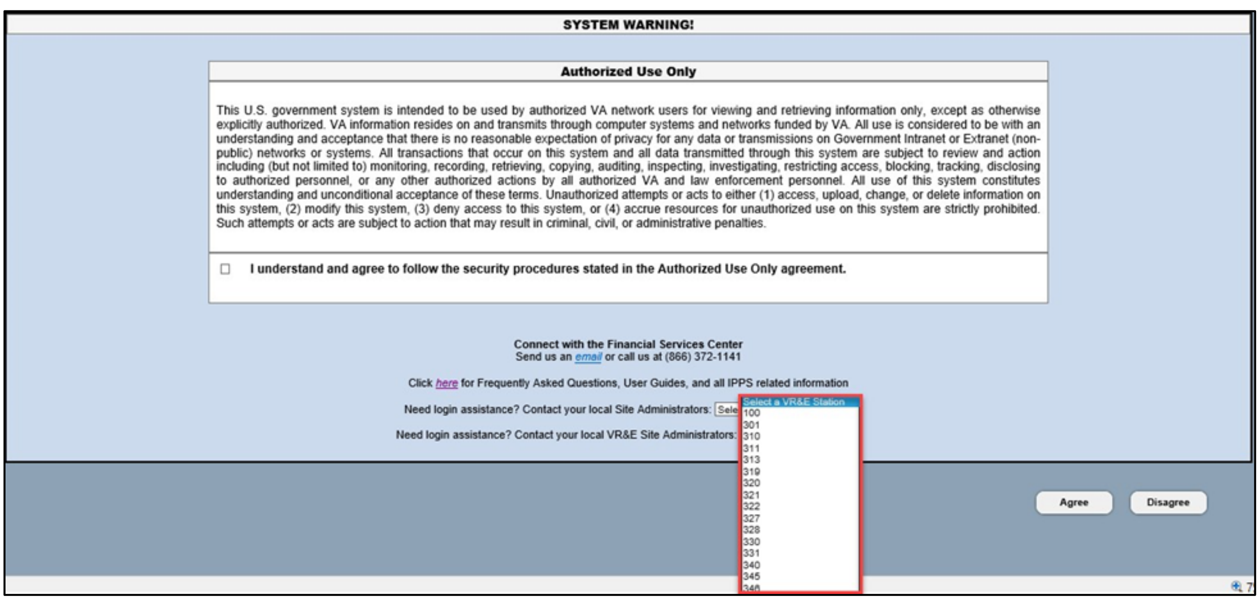


Figure 115: Authorization Notice

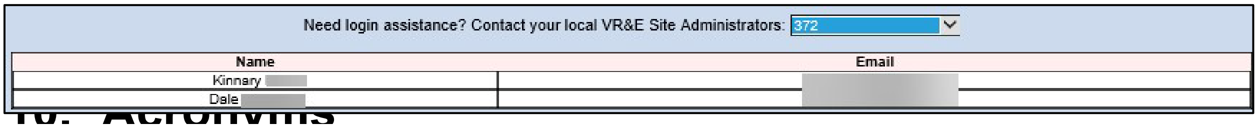


Figure 116: A list of Site Administrators

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