



Supplier Invoice Submission

Source to Pay Quick Reference Guide (QRG)

Purpose

This Quick Reference Guide (QRG) provides step-by-step instructions and process considerations for a Supplier to submit, edit or cancel an invoice.

Role(s)

This Quick Reference Guide is useful for the following Role:

- Supplier

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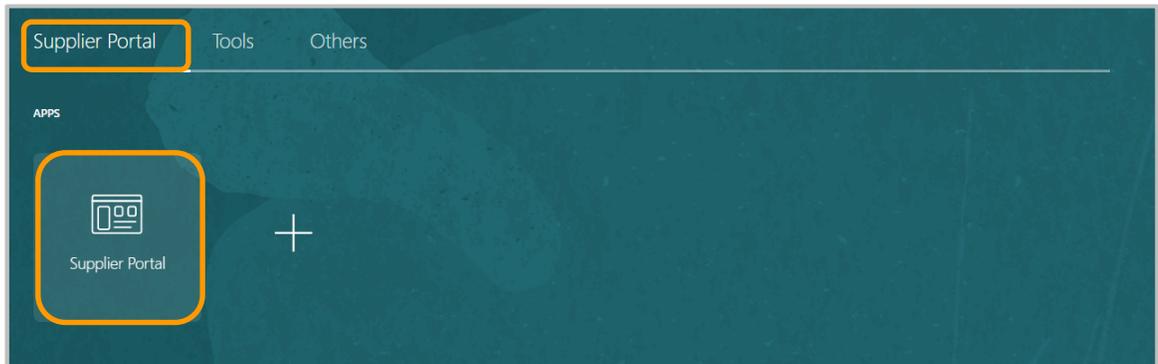
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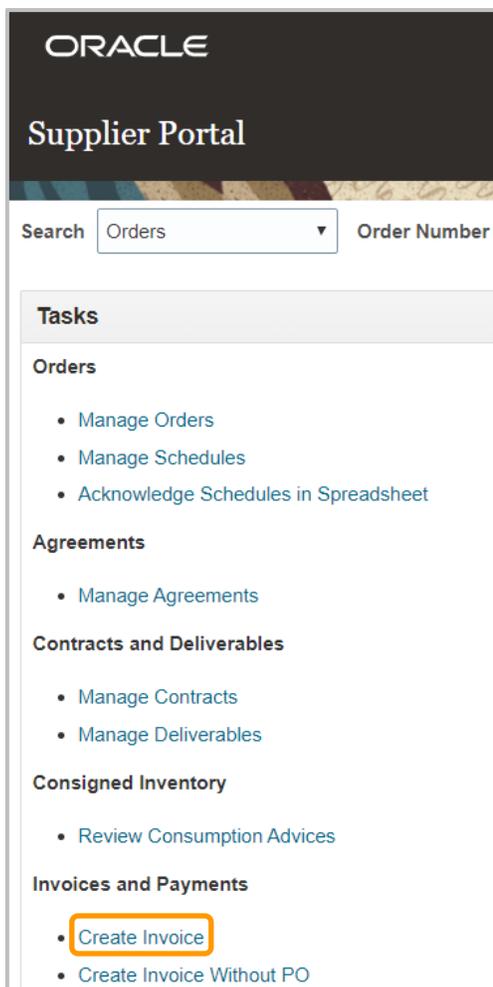
Step-by-Step Instructions:

Invoice Submission with PO

1. Under the **Supplier Portal** tab, click the **Supplier Portal** tile.



2. Click the **Create Invoice** hyperlink.





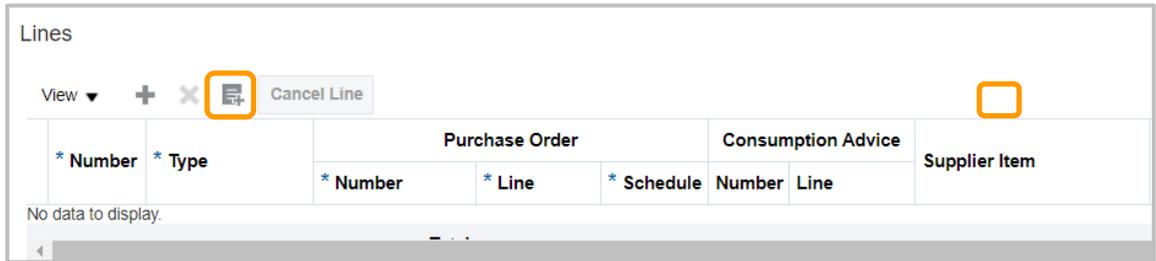
3. Enter the required details which are identified by an asterisk: Identifying PO, Supplier site, Number, Date (invoice date), Type and Attachments.
 - a. The PO number will start with US and a list of options will appear once you start to enter the number – click on the number that applies to the invoice being entered.
 - b. The dropdown arrow can be used to select a site.
 - c. Number refers to the invoice number.
 - d. Date refers to the date of your invoice.
 - e. Type should be invoice.

4. To attach the invoice, click on the + sign next to Attachments. When the following screen appears click on the Choose File button and select the file for the invoice click open.

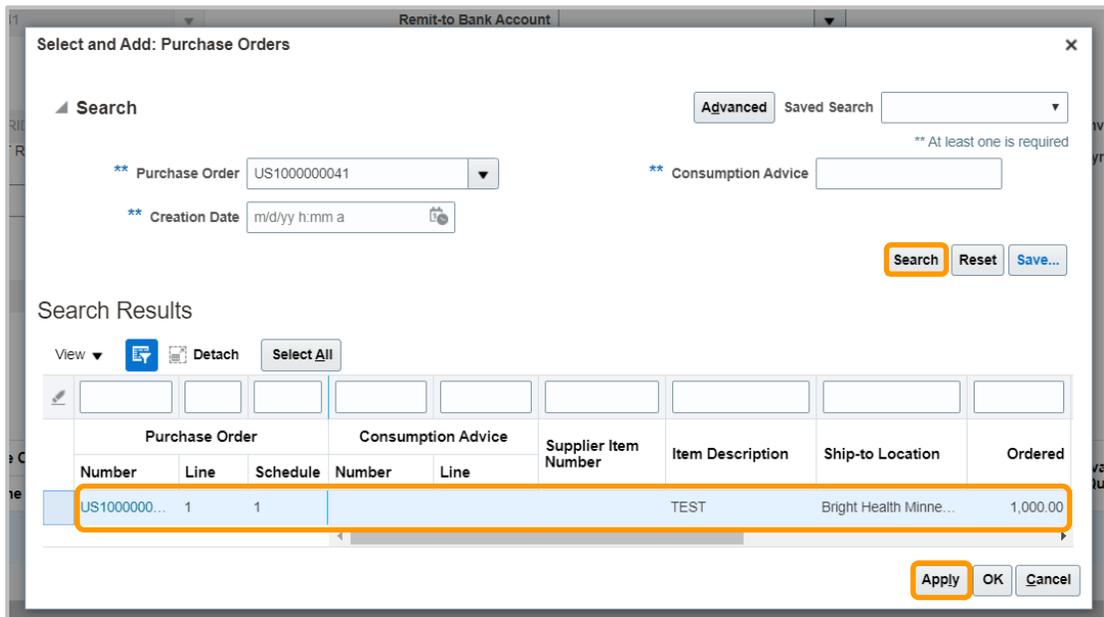
5. Once the file appears, click **OK**.



- 6. Under the Lines section, click the **Select and Add** icon. The icon that looks like a paper with + sign.



- 7. Select the **Purchase Order**. Click **Apply**.



To identify the appropriate purchase order number, refer to previously approved contracts.



8. Click **OK**.

Select and Add: Purchase Orders

Advanced Saved Search [dropdown]

** At least one is required

** Purchase Order US100000041

** Consumption Advice [input]

** Creation Date m/d/yy h:mm a

Search Reset Save...

Search Results

View [dropdown] [icon] Detach Select All

Purchase Order			Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Order
Number	Line	Schedule	Number	Line				

Apply OK Cancel

9. When this screen appears scroll to the right until the amount box appears.

Lines

View [dropdown] + X [icon] Cancel Line

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Av. Qt
		* Number	* Line	* Schedule	Number	Line					
1	Item	US2500...	1	1			Staff Aug - S. Zandlo	Bright Health M	[dropdown]	[dropdown]	
Total											

Summary Tax Lines

View [dropdown]



- 10. The amount field will display the balance of what is left on the PO. If the current invoice amount is different than the amount referenced, this field should be updated with the current invoice amount.

Lines

View

Position Advice	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Description
Line		Staff Aug - S. Zandlo	Bright Health M						2,960.00	Staff Aug - S. Z
									2,960.00	

Summary Tax Lines



- 11. Go to the upper right-hand corner of the screen and click **SAVE**.

Need Help?

Invoice Actions

* Number

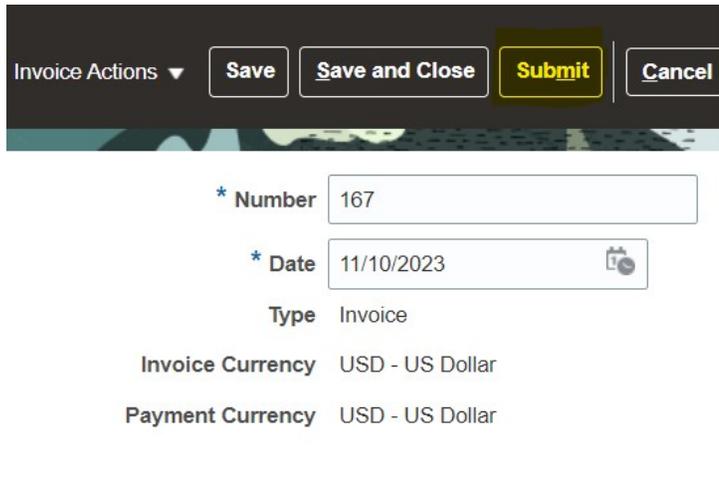
* Date

Type Invoice

Invoice Currency USD - US Dollar

Payment Currency USD - US Dollar

- Click **Submit**.



Invoice Actions ▾ **Save** **Save and Close** **Submit** **Cancel**

* Number

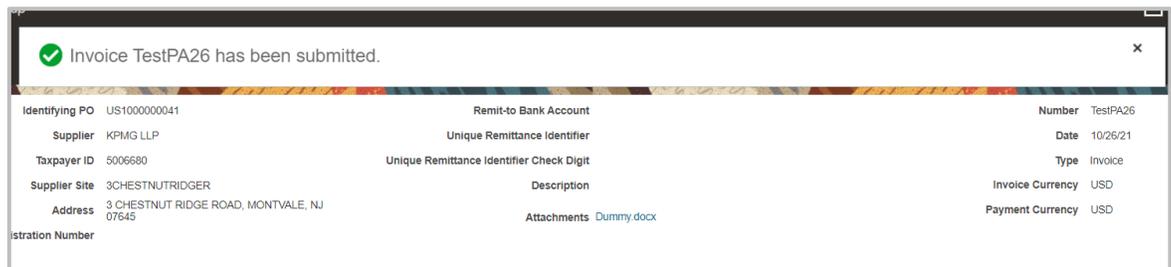
* Date 

Type Invoice

Invoice Currency USD - US Dollar

Payment Currency USD - US Dollar

- A message will appear on the screen. Invoice XXXXX has been submitted. This message is confirmation that the invoice has been successfully entered in the system.



 Invoice TestPA26 has been submitted. ✕

Identifying PO	US1000000041	Remit-to Bank Account	Number	TestPA26
Supplier	KPMG LLP	Unique Remittance Identifier	Date	10/26/21
Taxpayer ID	5006680	Unique Remittance Identifier Check Digit	Type	Invoice
Supplier Site	3CHESTNUTRIDGER	Description	Invoice Currency	USD
Address	3 CHESTNUT RIDGE ROAD, MONTVALE, NJ 07645	Attachments	Payment Currency	USD
Registration Number				

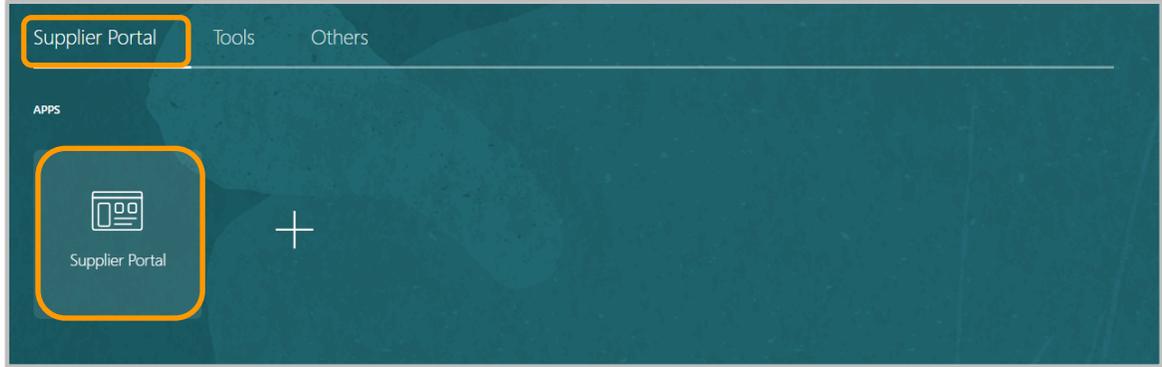


The Status will change once the invoice is validated by the AP users.

Step-by-Step Instructions:

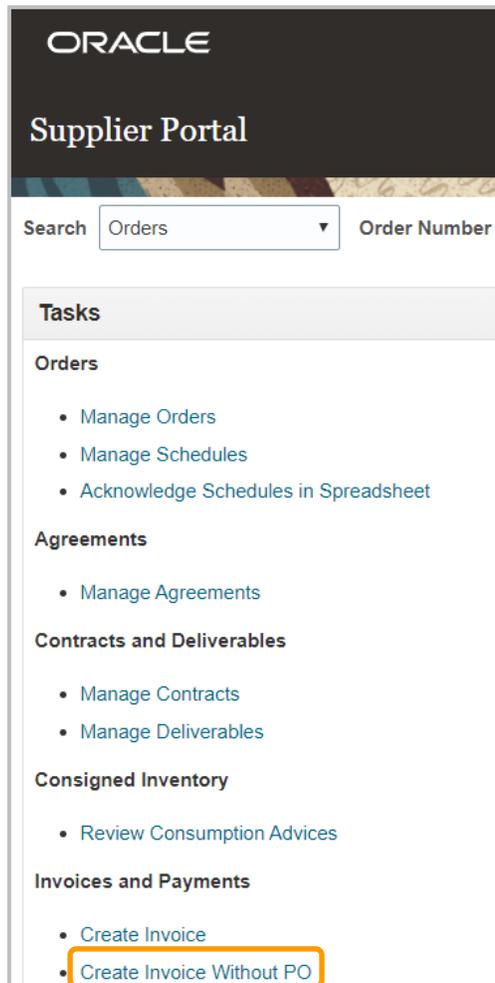
Invoice Submission without PO

1. Under the **Supplier Portal** tab, click the **Supplier Portal** tile.

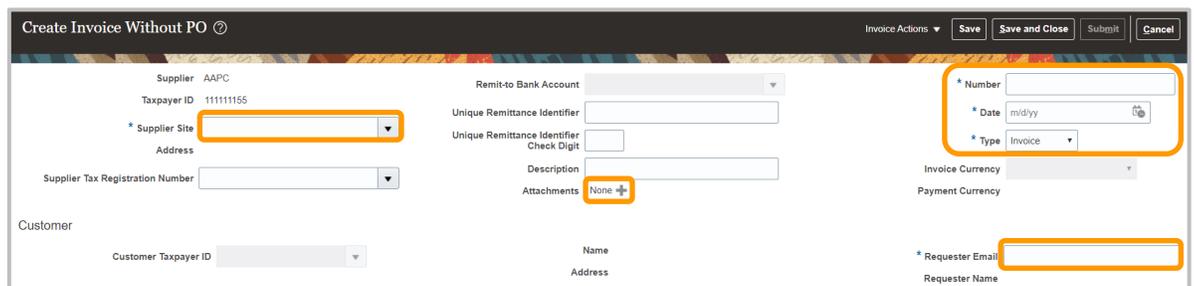




2. Under **Invoices and Payments**, click **Create Invoice Without PO**.

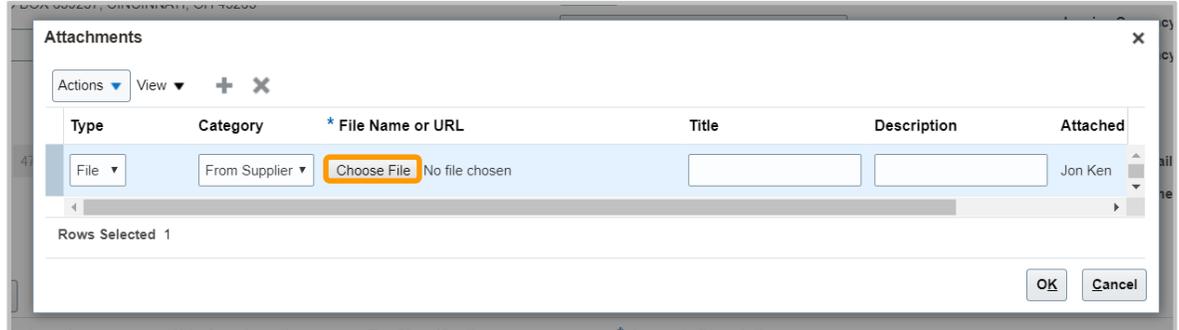


3. Enter the details for required **Supplier Site**, **Number**, **Date** and **Requester Email** fields. The requestor should be the business owner from Bright Health Group that engaged your organization to provide services or goods. If the requestor is not known, contact the Bright Health Group Procurement Department. Click the **+** icon to add Attachment.



Suppliers Site locations will be defined during the supplier set up stage.

- Click **Choose File**.



Attachments

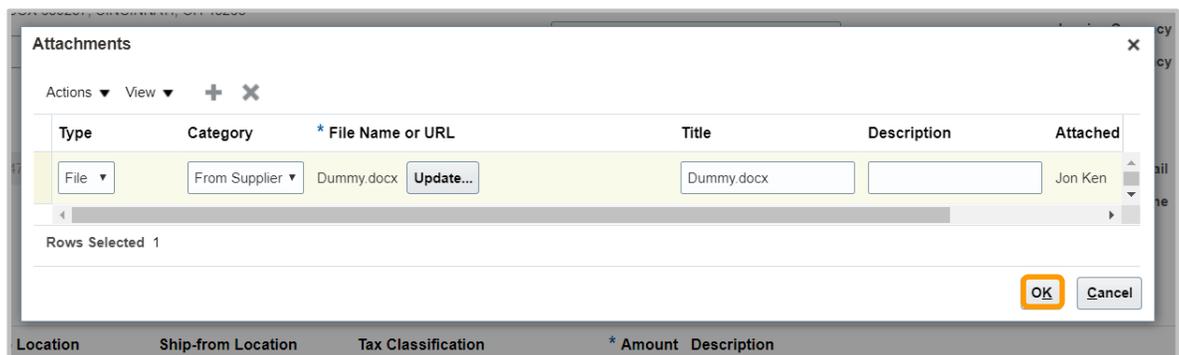
Actions View + X

Type	Category	* File Name or URL	Title	Description	Attached
File	From Supplier	Choose File No file chosen			Jon Ken

Rows Selected 1

OK Cancel

- Select the appropriate file to add as attachment.
Click **OK**.



Attachments

Actions View + X

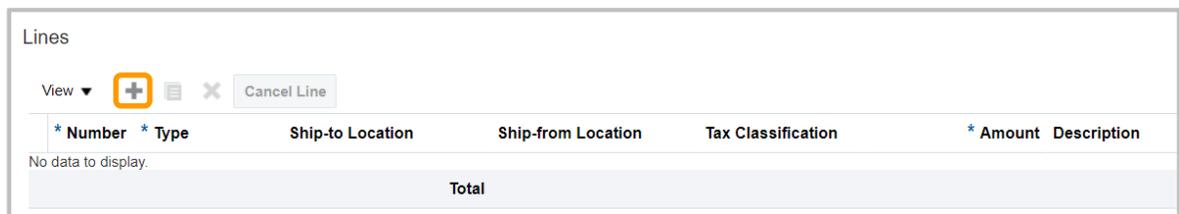
Type	Category	* File Name or URL	Title	Description	Attached
File	From Supplier	Dummy.docx Update...	Dummy.docx		Jon Ken

Rows Selected 1

OK Cancel

Location Ship-from Location Tax Classification * Amount Description

- Under the **Lines** section, click **+** icon to add a row.



Lines

View + Cancel Line

* Number	* Type	Ship-to Location	Ship-from Location	Tax Classification	* Amount	Description
No data to display.						
Total						



- 7. Enter the required details (Number, Type and amount)

Lines

View ▾ + [List Icon] X Cancel Line

* Number	* Type	Ship-to Location	Ship-from Location	Tax Classification	* Amount	Description
1	Item				100.00	
Total					100.00	

- 8. Click **Submit**.

Invoice Actions ▾ Save Save and Close **Submit** Cancel

- 9. Review the submitted message.
Click **Done**.

ITM [Checkmark] Invoice USER INITIALS - 014 has been submitted. X Create Another Done

Printable Page Create Another **Done**