

# Emory's Invoice Status and Statement Reconciliation Portal Guide

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## GENERAL QUESTIONS

### What is the purpose of this portal?

This is a multi-functional self-service portal for reconciling statements and researching statuses of invoices and payments that is available 24/7 and does not require a registration, a username, or a password. Though validation through a data matched transaction is required to access advanced features of the portal, the system is inherently secure, as it does not contain sensitive or confidential data.

### How do I start using the self-service portal?

Using this self-service portal is an easy 3 step process.

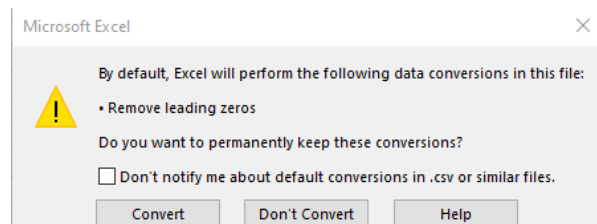
1. Access the website via <https://emory.invoiceinfo.com/>
2. A search homepage will appear, allowing users to conduct status searches on invoices or payments. A successful search will require two fields to be entered that exactly match the data in our system, and one of the required fields must be Supplier Invoice Number, Emory Voucher Number, Payment Advice Reference Number, Emory Payment Reference Number, or Supplier Number. The second field can be any other field available. Once these fields have been entered, click 'search'.
3. If the search criteria exactly matches that in the system, then the associated invoice or payment information will populate. A Supplier Number will also be displayed, which allows for advanced features to be utilized. If input criteria do not exactly match the system data, then no results will display. For security reasons, the system will time-out for roughly 10-15 minutes after the threshold for unsuccessful searches has been exceeded.

### Why can't I use partial values or ranges to search?

Rather than having to set up individual user accounts and passwords, the system is designed to require specific combinations of information that would only be available to vendors or individuals who have authorized access to that information. Therefore, ranges or partial values are not allowed as search criteria.

### Can I download the results after performing a successful search?

Yes. Simply click on the **Download Results in CSV Format** link. Please note the data may contain leading zeros like in the supplier invoice number field so if you retain these leading zeros, select "Don't Convert" when viewing the file in excel.



## INVOICE QUESTIONS

### How far back can an invoice status be retrieved on this website?

Invoices with an invoice date less than 3 years old can be accessed; for anything older, use the Contact Us link on the site to contact the appropriate Emory Customer AP Team. Include the Invoice ID and Vendor Name in question.

### What if my invoice is less than 3 years old but I can't retrieve it on this website?

This could be due to several reasons:

1. You did not enter the correct search criteria or entered your criteria using the wrong fields. All search criteria must match exactly to the invoice (invoice ID, date, amount, etc.), so you must enter full values that match exactly. Partial values will not be found as they are not an exact match.
2. The invoice data was adjusted when processing the invoice causing a mismatch with what you have on file versus how Emory processed the invoice. It is recommended that a date range invoice search be conducted to rule out this possibility. This advanced feature is unlocked by performing one successful search using a different invoice that has been processed which will auto populate your **Supplier Number** in the search fields along with a secondary date field added to **Invoice Date**. To search for invoices by date range, remove all prior search criteria manually (do not click reset), leaving only the supplier number, and then enter the beginning and ending invoice date range desired. A successful Invoice Date Range Search will provide the status of all invoices dated within that period but is limited to invoices received within the last three years.
3. You entered special characters or spaces contained in your Invoice ID# for an invoice associated with Emory Healthcare. Emory Healthcare often modifies Invoice ID# to omit special characters and spaces during processing. Invoice ID#'s that are the same Customer # each month, are modified by adding the 3 letter Month & 2-digit Year to the end of the Customer #.
4. If none of the above and it has been more than 5 business days since the invoice was submitted, then it can be assumed your invoice has not been received. You should resubmit the invoice using the original invoicing method.

### What is the difference between an *Invoice Amount* and *Payment Amount*?

**Invoice Amount** is the amount that is associated with the specific invoice, whereas the **Payment Amount** is the full amount of the ACH deposit, check or SUA credit card payment (and may include payment for more than one invoice). Only when an invoice is marked payable or paid is the invoice amount noted a 'final' amount, as invoices that are 'in process' may still be adjusted to comply with the contracted pricing of the PO.

## PAYMENT QUESTIONS

### How far back can a payment status be retrieved on this website?

Payments associated with an invoice with an invoice date less than 3 years old can be accessed; for anything older, use the Contact Us link on the site to contact the appropriate Emory Customer AP Team. Include the Invoice ID and Vendor Name in question.

### How do I see what invoices were included for a payment?

Enter the **Payment Advice Reference Number** and either the **Payment Date** or **Payment Amount** (information provided either by your bank or via email from Emory) and click Search. All invoices making up the specified payment, along with their amounts, will be displayed.

### How do I see what invoices were included for a payment without knowing the payment advice reference number?

Enter the **Supplier Invoice Number** and either the **Invoice Date** or **Invoice Amount** and click Search. The invoice should be displayed and, if paid via ACH, will have a **Payment Advice Reference Number, Payment Date, and Payment Amount**. Make note of these value, and then click RESET. Now enter the noted **Payment Advice Reference Number** and either the **Payment Date** or **Payment Amount** and click Search. You should see a list of all invoices and the amount paid for each.

### How do I determine the account that received the deposit for an ACH payment?

If your invoice is displayed and indicates that **Payment Status = P (Paid)** and the **Payment Method = ACH**, review the **Bank Acct Ending In** field to see the last 4 digits of the bank account to which the deposit was made.

### What do I do if I am paid via physical check and my check has not been received?

The check number will be displayed in the **Emory Payment Reference Number** field. If the check has been cashed and cleared the bank, it will have a **Payment Cleared Date** populated. Payments which have cleared are not re-issuable. If the check has not cleared, use the Contact Us link on the site to contact the appropriate Emory Customer AP Team to request that the check be cancelled and reissued.

Please ensure that you include your proper mailing address in your correspondence, as well as your business name and the Invoice ID Number in question, so that we may verify that we have the correct mailing address.

Please note that ACH is Emory's preferred payment method. You may wish to provide ACH information for your company, which will enable you to receive your payments faster electronically. Please email the appropriate Emory Customer AP Team to request our ACH form.