**Invoice Processing Platform (IPP) Frequently Asked Questions (FAQ)**

## Introduction and Document Organization

This document provides answers to common questions asked about the Invoice Processing Platform. The document is structured as follows:

- Vendor Transition to IPP
- IPP Access
- Awards in IPP
- Creating an IPP Invoice
- Resolving IPP Error Messages
- NIH Invoice Processing

**Acronyms used in this document:**

| Acronym | Description |
|---|---|
| COR | Contracting Officer's Representative |
| IPP | Treasury's Invoice Processing Platform |
| OFM | NIH Office of Financial Management |
| PO | All awards are referred to as "PO" in IPP |
| POC | Point of Contact |
| UEI | Unique Entity Identifier |
| Vendor | Includes contractors and vendors |

# Invoice Processing Platform (IPP) Frequently Asked Questions (FAQ)

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## Q&A Table of Contents:

# Invoice Processing Platform (IPP) Frequently Asked Questions (FAQ)

## Vendor Transition to IPP

***Updated July 2024* - Q1. How do I determine when my company transitions to IPP?**
A: The majority of existing NIH vendors have transitioned to IPP and must use IPP for invoice submission. A small number of foreign, utility and lease vendors have not transitioned to IPP. New vendors doing business with NIH will transition to IPP when the vendor is added to NBS, unless a determination is made by NBS and OFM that a specific vendor will not transition to IPP.

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***Updated July* 2024 - Q2: Are foreign vendors transitioning to IPP?**
A: Foreign vendors with a domestic Tax Identification Number (TIN) and an active SAM.gov record with domestic banking will transition to IPP. NIH staff should check the NBS Vendor Site Helpful Lookup to determine a vendor's IPP status (see NIH IPP FAQ Q3 below). If a foreign vendor has not transitioned to IPP, please send an email to the NIH OFM Vendor Management Team (nbrssgovtacctg@mail.nih.gov) with the vendor's name and associated UEI number.

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**Q3: How do I determine if a vendor has transitioned to IPP?**
A: Using the NBS Vendor Site Helpful Lookup (nih.gov) and the vendor's UEI number, if the "Vendor IPP Enabled = Yes" **and** "Vendor Site IPP Status = Matched", then the vendor has transitioned to IPP and must use IPP for invoicing. The NBS Vendor Site Helpful Lookup is only available to NIH staff. If the vendor is not matched, please contact the NIH OFM Vendor Management Team (nbrssgovtacctg@mail.nih.gov) for the vendor's matching status.

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**Q4. If my vendor is not matched in the NBS Vendor Site Helpful Lookup, how do I get them matched?**
A: Contact the NIH OFM Vendor Management Team at nbrssgovtacctg@mail.nih.gov for the vendor's matching status.

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## IPP Access

**Q5: Who is the vendor's IPP POC? What is the vendor's IPP User ID and Password?**
A: Please review the FAQs on Treasury's IPP website https://www.ipp.gov/vendors/faq-vendors under the "Enrollment" section for enrollment information.

If NIH enrolls a vendor in IPP (meaning the vendor is not already using IPP at another agency), then the vendor's SAM.gov POC will be the vendor's IPP POC.

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If a vendor does not know the name of their IPP POC, did not receive their IPP User ID and Password, or is having IPP access issues, then the vendor should contact Treasury's IPP help desk. Since IPP is a Treasury system, Treasury will need to assist with log-in or access issues.

**Treasury's IPP Help Desk:**
Support | (866) 973-3131, M-F 8AM to 6PM ET, IPPCustomerSupport@fiscal.treasury.gov

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**Q6: How quickly will a vendor receive their IPP User ID and Password?**
A: It depends.  If the vendor is already enrolled in IPP, then the vendor will use their existing login credentials.  If the vendor is not enrolled in IPP, then the Treasury IPP team typically enrolls vendors within 2-3 business days after the NIH OFM submits the vendor information to Treasury. The Treasury IPP team will reach out to the vendor's SAM.gov POC and provide IPP credentials.

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**Q7: How are additional vendor individuals added to an IPP account?**
A: The vendor's IPP POC can add other vendor users to their IPP account.

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**Q8: I am a COR who is responsible for reviewing invoices.  How do I access IPP?**
A:  CORs, program staff, and acquisition staff do not need access to IPP to review and approve invoices. Invoice receiving, review and approval is performed in the NBS workflow.

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## Awards in IPP

**Q9: The vendor's award is not in IPP.  Who do I contact?**
Response: NIH as an agency and a vendor's POs will be available in IPP after the vendor transitions to IPP.  If a vendor has transitioned to IPP and does not see their POs in IPP, then the vendor should use the advance search in IPP and search for the full PO number (parent and child, if applicable) as it appears on the award and remove the date range in the search criteria. If the PO still is not in IPP, please contact NIH OFM Customer Service (301-496-6088 or ofm_customer_service@mail-cmp.niceincontact.com) for assistance.  Please provide vendor's name and full PO number.

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**Q10: How quickly will a vendor's PO be visible in IPP?**
*A:* Once the vendor is matched by the NIH OFM, POs are sent to IPP on a daily basis.

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## Creating an IPP Invoice

**Q11: I am not sure how to enter my invoice in IPP.  Who can I contact to walk me through the process of entering an IPP invoice?**

A: Treasury has an extensive IPP website (https://www.ipp.gov) with vendor training resources.  Please review the below vendor training resources located on Treasury's IPP website at ipp.gov/vendors/training-vendors:

- Monthly Vendor Webinars (training sessions)
- Video Tutorial (IPP First Time Login)
- Quick Reference Guide
- IPP Collector User Guide

Treasury's IPP FAQs are located at ipp.gov/vendors/faq-vendors.

In addition, the line item unit price and/or amount in IPP reflects the information in PRISM so vendors must invoice based upon the way the PRISM line was set-up. Please reference the "IPP PO Quantity and Unit Price Best Practices" document located on NIH's OALM Invoice Processing Platform (IPP) Information | Office of Management (nih.gov) website for best practices on invoicing using the Treasury IPP platform.

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**Q12: My award does not have a "Create" button so I cannot create an IPP invoice.  Who do I contact to resolve this issue?**

A: Please send an email to NIH OFM Customer Service at ofm_customer_service@mail-cmp.niceincontact.com  with the vendor's name, full award number, and a detailed description of the issue.

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**Q13: The award is closed in IPP, but the vendor has not fully billed for the total dollars and/or quantity.  What needs to be done to open the award so that the vendor can submit an invoice?**

A: Please send an email to NIH OFM Customer Service at ofm_customer_service@mail-cmp.niceincontact.com  with the vendor's name, award number, and a detailed description of the issue.

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**Q14: I am submitting my first invoice in IPP, but the unit price and amount does not match how I have been invoicing in the past.  What do I invoice in IPP?**

A: The line item unit price and/or amount in IPP reflects the information in PRISM so vendors must invoice based upon the way the PRISM line was set-up.  Please reference the "IPP PO Quantity and Unit Price Best Practices" document located on NIH's OALM Invoice Processing Platform (IPP) Information | Office of Management (nih.gov) website for best practices on invoicing using the Treasury IPP platform.

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# Invoice Processing Platform (IPP) Frequently Asked Questions (FAQ)

**Q15: In IPP, the line item unit price and/or amount is incorrect. How do I correct the line item unit price and/or amount?**

A: The line item unit price and/or amount in IPP reflects the information in PRISM. This information can only be changed via a PRISM modification. Once payment has been made on a PRISM line, the unit price and amount cannot be changed in PRISM.

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**Q16: How can I get my PRISM line changed?**

A: Please contact the NIH Contracting Officer.

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**Q17: In IPP, how can I determine the remaining quantity and unit price on a line item?**

A: In IPP when a vendor tries to create an Invoice against a Purchase Order, the remaining quantity and unit price are auto-populated in the corresponding invoice lines.

The below screenshots from IPP Collector module show the auto-populated invoice lines with the remaining quantity and unit price for the corresponding PO lines. If a PO line does not have any remaining balances left, the corresponding invoice line will not appear. A vendor cannot invoice in excess of the remaining quantity or amount.



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**Q18: My PO states a quantity of "1", but I need to invoice for more than a quantity of "1". What quantity do I enter?**

A: It is possible that the PO was incorrectly set-up. If it looks like the quantity and amount should be "flipped", then the vendor will need to leave the unit price unchanged and invoice for a quantity of less than "1". IPP has a 6 decimal limit.

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# Invoice Processing Platform (IPP) Frequently Asked Questions (FAQ)

**Q19:  I have submitted several invoices against a line item with a Quantity of "1".  How do I determine the remaining balance on the line item?**
A: When the vendor creates an invoice in IPP, the remaining Quantity will be shown in the column with the "QTY" label.

**Q20: How do I determine what quantity of less than 1 to enter in IPP when invoicing against a line set-up with a quantity of 1?**
A: You will divide the line amount that you want to invoice for by the unit price to get the decimal quantity to enter in IPP (Invoice Line Amount /Unit Price= Quantity). Please note that IPP has a 6 decimal limit.

    Example: <u>Unit Price: 19,539.38</u>      <u>Invoice Line Amount: 2,166.66</u>



Factoring Quantity:

2,166.66 /19,539.98=0.110883429768096
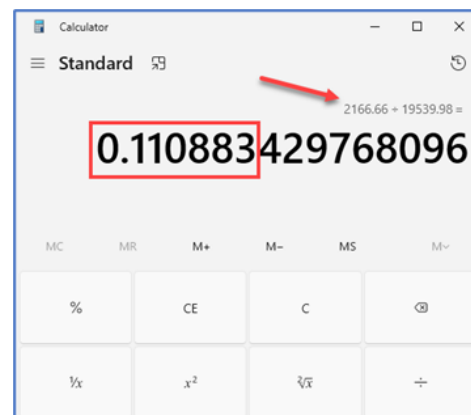
Checking Quantity:

0.110883 * 19,539.98 = $2,166.65
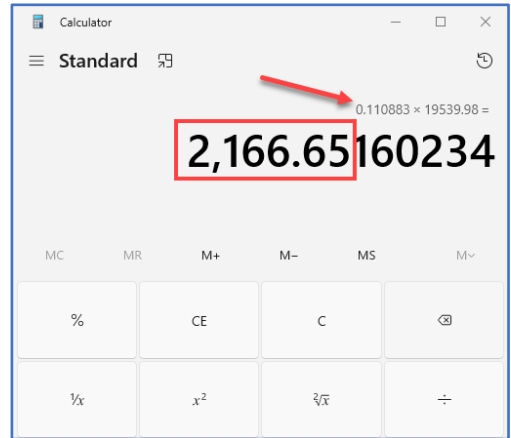
**Q21: How does a vendor cancel an IPP invoice?**
A: The vendor should contact NIH OFM Customer Service at ofm_customer_service@mail-cmp.niceincontact.com and request that an IPP invoice be cancelled.  Please provide the vendor's name, full PO number and invoice number.

**Q22: A vendor's invoice is on hold. Who should the vendor contact?**
A: A 2-way match invoice may require invoice approval in NBS, or a 3-way match invoice may require receiving to be entered in NBS.  Please contact the NIH Contracting Officer. If the NIH Contracting Officer cannot resolve the issue, then please contact NIH OFM Customer Service at ofm_customer_service@mail-cmp.niceincontact.com .  NIH OFM will need the vendor's name, full PO number and invoice number.

## Resolving IPP Error Messages

**Q23: How does the vendor fix an IPP invoice that is save in "Exception" with an "EFT/+4 Code does not match the vendor site code" or "No Vendor Site given for combination of Site Code and EFT" error message?**
A: Please check the EFT/+4 Code field on the invoice. This field should be blank unless the vendor has more than one (1) Unique Entity Identifier (UEI) number.  In this case, the EFT/+4 Code field will contain the 4-digit Electronic Funds Transfer (EFT) code that is added to the base UEI number.  Please resubmit the invoice with a different invoice number and ensure that the EFT/+4 Code field reflects the correct information. If the field should be blank, then remove any pre-populated information.

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**Q24: How does the vendor fix an IPP invoice that is save in "Exception" with an "Vendor site ID is not Active" error message?**
A: The vendor's SAM.gov record was expired at the time that the invoice was submitted. The vendor must reactivate its SAM.gov record.  Once the SAM.gov record is active, then the vendor should resubmit the invoice with a different invoice number.

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**Q25: How does the vendor fix an IPP invoice that is save in "Exception" with an "Unit price is above limit set by the agency for PO Line – Please correct Unit Price" error message?**
A: The vendor should keep the Unit Price as stated in IPP (do not change the unit price) and update the Quantity to reflect the full price that the vendor wants to invoice for that line.

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**Q26: How does the vendor fix an IPP invoice that is save in "Exception" with an "Quantity is above limit set by the agency for PO Line – Please correct Quantity" error message?**
A: This may be a situation where the PO was set-up with a Quantity of "1" and the vendor has submitted more than 1 invoice.  The vendor should keep the Unit Price as stated in IPP (do not change the unit price) and update the Quantity to reflect a number less than "1".  IPP has a 6 decimal limit so rounding issues will occur.

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**Q27: How does the vendor fix an IPP invoice that is save in "Exception" with an "Extended Price is above limit set by the agency for PO Line – Please correct Quantity and/or Unit Price" error message?**
A: This is a situation where the vendor is invoicing in excess of the Quantity and/or Unit Price.  The vendor should review the line item and invoice according to the way the line was set-up.

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**Q28: What should the vendor do if they cannot figure out how to correct an IPP error message?**
A: Please send an email to the NIH OFM Customer Service at ofm_customer_service@mail-cmp.niceincontact.com with the vendor's name, IPP screenshots of the error message and a description of the problem.

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## NIH Invoice Processing

**Q29: What processes have changed with NIH's transition to IPP?**
A: The method by which a vendor submits an invoice has changed **from** electronic invoice submission to the NIH Office of Financial Management (OFM) **to** invoice submission via IPP. Partial approval of invoices is not permitted with IPP.  Existing processes for inspection, acceptance, receiving, invoice review and approval have not changed.

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**Q30: How does NIH staff cancel an IPP invoice?**

A: Please do the following:

- <u>For 2-way match awards</u> – NIH staff should cancel the invoice in the NBS workflow.  An OFM Triage Ticket is no longer needed.
- <u>For 3-way match awards</u> - NIH staff should contact your NIH Institute/Center (IC) Invoice Specialist who must submit an OFM Triage Ticket.  The Triage Ticket must be identified as "IPP".

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**Q31: How do I determine the funds remaining on a PRISM line?**

A: NIH staff should use iSupplier (see below screenshot) or the nVision NIH Award Search to obtain this information.



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**Q32: How do I determine all invoices that were paid against a PRISM line?**

A: NIH staff should use iSupplier (see below screenshot) or the nVision NIH Award Search to obtain this information.

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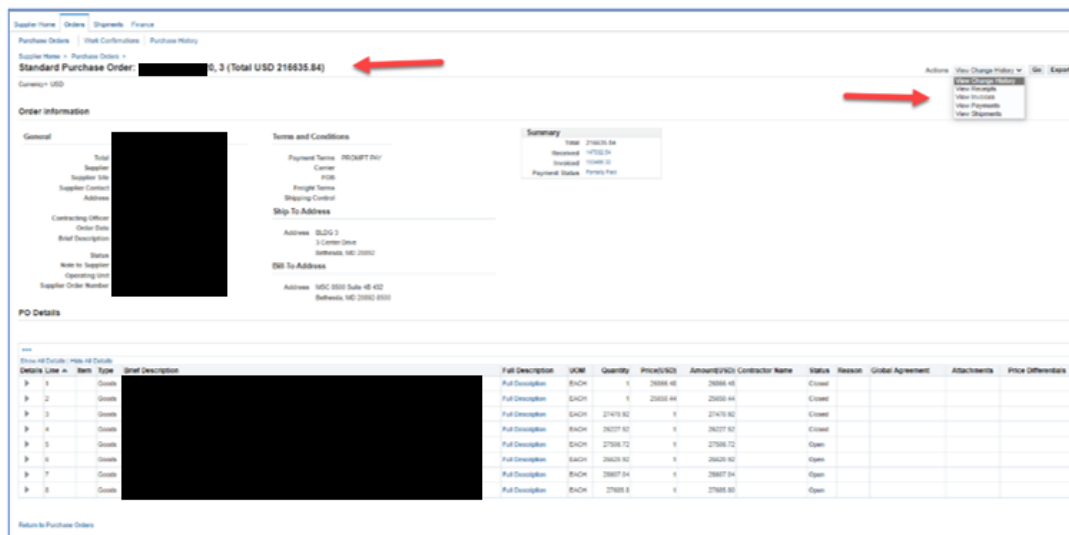
## New FAQs Added After July 12, 2023

**Q33: What is Multifactor Authentication and where can I find information on this change?**
A: Beginning August 28, 2023, Multifactor Authentication (MFA) will be required to login to IPP.  MFA requires two factors to confirm user identity. For additional information, please visit Treasury's MFA webpage and FAQs (ipp.gov/vendors/multi-factor-authentication).

**Q34: The vendor's award is not in IPP.  Who do I contact?**
Response: NIH as an agency and a vendor's POs will be available in IPP after the vendor transitions to IPP.  If a vendor has transitioned to IPP and does not see their POs in IPP, then the vendor should use the advance search in IPP and search for the full PO number (parent and child, if applicable) as it appears on the award and remove the date range in the search criteria. If the PO still is not in IPP, please contact NIH OFM Customer Service (301-496-6088 or ofm_customer_service@mail-cmp.niceincontact.com) for assistance.  Please provide vendor's name and full PO number.

**Q35: In IPP, what does "Pending Approval" mean?**
A: The invoice is pending Government approval (e.g., receiving needs to be entered for a 3-way match PRISM award, or the invoice needs Contracting Officer approval for a 2-way PRISM match award). Please contact your NIH Contracting Officer and program/Contracting Officer Representative (COR) for assistance.

# Invoice Processing Platform (IPP) Frequently Asked Questions (FAQ)

**Q36: My vendor submitted an invoice via IPP.  When will the vendor receive payment for the invoice?**
A: Before invoice payment is made, receiving needs to be entered in NBS for a 3-way match invoice, or the Contracting Officer needs to approve the 2-way match invoice in NBS.  Once the receiving or invoice approval is completed, the invoice is processed for payment.  A specific invoice payment date can be located as follows:

- Vendors should contact NIH Office of Financial Management (OFM) Customer Service for assistance: 301-496-6088 or ofm_customer_service@mail-cmp.niceincontact.com . NIH OFM will need the vendor's name, full PO number, and invoice number.
- NIH staff can locate an invoice estimated payment date by using the invoice search in iSupplier. Enter the invoice number and the invoice/vendor information should appear.  Click on the "Scheduled Payments" and the detailed invoice information will appear, including the Due Date which is the payment date.  See below screenshots.