

REVIEWING INVOICE INFORMATION

The State of Ohio Supplier Portal is accessed at <https://supplier.ohio.gov/>.

The Supplier Portal is designed to provide you, a supplier or provider that is conducting business with the State of Ohio, with convenient access to information about your business's financial interactions with the state.

FIRST STEP FOR USING THE PORTAL

To begin using the Portal, State of Ohio Supplier Users will log into the site using their OH|ID. OH|ID provides an 8-digit user ID that can be used to access a variety of the State of Ohio's online applications. **OH|ID is your personal account (it is for you, not for your business)**. It delivers a more secure and private experience for users during online interactions with the state – with advanced fraud detection, prevention, and analytics features.

SECOND STEP FOR USING THE PORTAL

Once you obtain and sign into the Supplier Portal with your OH|ID account, you can either:

- Register your business (or yourself if you're a Provider) to conduct business with the state.
- OR associate your personal OH|ID with one (or many) business(es) that are already in the state's accounting system to conduct business with the state

USING THE PORTAL

The Supplier Portal is meant to be explored, so make yourself at home. We encourage you to sign up for an OH|ID, log in, add your business to your account (either as a new or existing supplier), and begin clicking around. Most information you need (such as invoices, purchase orders, payments – and the financial details in them) is only a few clicks away – and can be found through the top menu bar options and/or by searching for specific items on the applicable pages.

If you run into challenges, don't hesitate to reach out by email (ohiosharedservices@ohio.gov) or phone (877-644-6771).

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The Supplier Portal is designed to make it quick and easy to navigate through information about your financial transactions with the State and find the details you need.

Understanding the Dashboard View

After you have associated a business with your account, the dashboard will be the first page you see when you log in. The dashboard contains a wealth of summarized information about your financial interactions with the State of Ohio, as shown below.

Supplier information for
ACME COMPANY

Based on the underlined selection the total amount for applicable items will be shown here, with a breakdown by State agency shown in the pie chart on the right

Use these dropdown menus to narrow the information shown by agency or year

Agencies by Activity
Ohio State Agencies ordered by their level of involvement with your business.

2017

Job and Family Services: 1738

Hovering over and / or clicking on a section will reveal more details

Supplier Portal News

This section will contain articles, notices, and more

Now You Can Invite Your Colleagues to be a Part of Your Business!

Thanks to all that attended online and in-person to the recent "How to do Business with the State" presentation. The presentation overview is now available for you to download.

Supplier Portal News - Feb 21, 2018, 4:01:56 PM EST

Know the New Supplier Portal Functions

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- Feb 21, 2018, 3:59:47 PM EST

Selected Agency

Job and Family Services	\$1,738.00
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Helpful Hints:

- The invoice, purchase order, and payment information shown on this page are all in summary form, by year and state agency. For details on a specific invoice, purchase order, or payment, click on the applicable page in the menu bar and use the list or search functions to find the desired item and view the details page.
- The total amount and pie chart will only display if there is data available for the options selected. If these are blank, change your selections to options where you have transactional data available.
- On rare occasions, errors in data transfers between Supplier Portal and the state's accounting system may result in the total amount and pie chart being empty. Clicking 'ctrl + R' will reload the page and therefore refresh data for the selections you have made.
- eSettlement invoice data is not included in the summaries found on the dashboard. eSettlements invoices can be viewed by navigating to the eSettlements functionality under 'Invoices'.

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Understanding the Financial Details Pages

The Supplier Portal displays information from individual invoices, purchase orders, and payments, pulled directly from the state's accounting system at the time that you load the detail page.

Invoice Details

The Invoice Details page displays the full details for a single invoice as shown here. You can access Invoice Detail pages through either selecting a specific Invoice from a list in the 'Invoices' page (menu along the top) or clicking on the invoice hyperlink in an associated purchase order or payment.

An Official website of **Ohio.gov**

Supplier Portal **Ohio.gov**

Need assistance? **Help Center**

Dashboard Invoices Purchase Orders Payments Supplier Actions Forms

Invoice Details

← Back to Invoices List

Invoice ID: 2K16-08-25

PO #: 0000063888

Status: **Completed**

\$30,740.00 USD

Payment Terms: Net 30

The color here shows invoice status (see key terms below for full list)

Invoice Date: September 7th, 2016

Entered Date: October 11th, 2016

Due Date: June 6th, 2018

Purchasing Agency: OH Dept of MH & Addiction Svcs

Print

Invoice Lines

Item Id	Item Description	U O M	Quantity	Unit Price	Merchandise Amt
	Computers for Central Office	EA	29	\$1,060.00	\$30,740.00

Payments

Payment Id	Payment Date	Payment Status	Payment Amount
0008936461	2016/10/14	Paid	\$30,740.00

Find an Invoice

Search Invoices

Click these links to view the Purchase Order or Payment Details associated with this Invoice

Help/FAQS Privacy Statement Contact **ohio.gov**

Helpful Hints:

- The data on this screen represents what was keyed into the system by the State processor from the invoice.

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Key Terms and Field Definitions:

Term	Definition
<i>Invoice ID</i>	The number assigned to the invoice when it was entered into the state's accounting system
<i>PO #</i>	The purchase order to which this invoiced is tied
<i>Status</i>	The invoice status can be: <ul style="list-style-type: none"> - <i>Completed</i> = Invoice fully processed and payment complete - <i>Scheduled for Payment</i> = Invoice fully processed; payment approved but not yet sent - <i>Open</i> = Invoice approved, but payment not yet processed - <i>Pending</i> = Invoice received, but not yet approved
<i>Invoice Amount</i>	The total dollar amount of the invoice minus fee/tax exceptions; the color of the text indicates the payment status: <ul style="list-style-type: none"> - <i>Completed</i> = black - <i>Scheduled for Payment</i> = green - <i>Open</i> = yellow - <i>Pending</i> = yellow
<i>Invoice Date</i>	The date on the invoice that was sent to the State by the supplier
<i>Entered Date</i>	The date the invoice was entered into the State's accounting system (OAKS)
<i>Due Date</i>	The date the invoice is due to be paid
<i>Item ID</i>	An ID associated with each item. If a purchase order is associated with the invoice and an item ID is populated on the purchase order, this is the item ID from the purchase order
<i>U O M</i>	<u>U</u> n <u>i</u> t of <u>M</u> ea <u>s</u> ure for the item (e.g., dozen, box, etc.)
<i>Merchandise Amt</i>	The quantity times the unit price for the line item
<i>Payment ID</i>	The reference IDs for the payment(s) associated with this invoice
<i>Payment Status</i>	Possible values are: <ul style="list-style-type: none"> - <i>Prenote</i> – State is reviewing the electronic payment account info - <i>Overflow</i> – used for payments that reference more than eleven-line items - <i>Paid</i> – the payment was made to the supplier - <i>Stop</i> – the payment was stopped by the State - <i>Void</i> – the payment was voided by the State per request by the agency

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Using the Search Function

On Invoice pages, you will see a search box on the right side of the page. Clicking on the search button – in this case ‘**Search Invoices**’ – will reveal a search menu, as shown here.

The screenshot shows the 'Invoices' section for 'ACME COMPANY'. It displays a list of invoices with details like 'Invoice # B004' for '\$560.00 USD' and 'Invoice # ODRC01' for '\$55,158.00 USD'. A 'Search Invoice' modal is open in the center, with fields for 'PO ID', 'Invoice', 'From date', and 'To date'. Below these fields is a note: 'Please use * for wildcard search'. There are 'Cancel' and 'Search' buttons at the bottom of the modal. On the right side of the page, a 'Find an Invoice' button with a magnifying glass icon and the text 'Search Invoices' is highlighted with a red box.

Helpful Hints:

- Remember that invoices, purchase orders, and payments each have their own search function. Check to be sure you're in the search function that looks for the type of transaction you are wanting to find.
- The search function only looks up specific invoices, purchase orders, and payments based on their number in the state accounting system. If you know the full invoice, purchase order, or payment number, enter it in the appropriate field and click '**Search.**'
- If you only know part of the number, you can do wild card searches using the "*" to match one or more characters. For example, to search for all POs with a PO # that starts with 1001, the user would type '1001*' in the PO ID field.
- The search function returns all items that match the search terms you entered. It ignores blank fields. For example, you can search for all items within a specified date range by only entering the 'From date' and/or 'To date' and leaving the other fields blank.