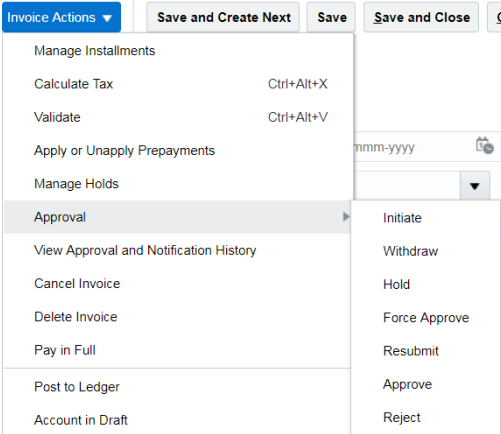


# Invoice Processing - Special Instructions for Payment

This will be used to request special action on checks processed for invoice payments, usually requesting they be held at the Controller's office for pickup.

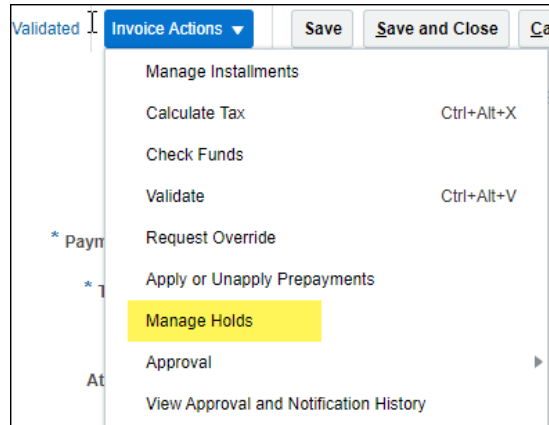
- Additional Resources:
- [GMHEC Website Support / Finance](#)
  - [ap@gmhec.org](mailto:ap@gmhec.org)

Process Step & Description	Action
<b>1.1 When to use</b>	<ul style="list-style-type: none"> <li>➤ This process is for when the user has <b>Special Instructions for Processing a Payment</b>, such as:               <ul style="list-style-type: none"> <li>○ Hold Request - for pickup of check instead of mailing to Supplier / Employee Address</li> <li>○ Documents need to be added to the envelope prior to mailing by the requestor</li> </ul> </li> </ul>
<b>1.2 Add a HOLD to Invoice</b>	<p>Navigation Path            Payables → Invoices → Recent → Create <i>(Follow Reference Guide for "Invoice Entry – Unmatched", then add the steps below for Special Requests)</i></p> <div style="border: 1px solid #008000; border-radius: 10px; background-color: #d9ead3; padding: 10px; margin: 10px auto; width: 80%; text-align: center;"> <p><b>QUICK TIP:</b> The <b>"Notes"</b> section is NOT intended for these requests</p> </div> <p>Once the Invoice Header and Line Item information is completed, including the Account Distribution details, follow the next steps to Validate and Initiate Approval – <b>all remaining steps must be done in this order!</b></p> <ul style="list-style-type: none"> <li>➤ Click the <b>Invoice Actions drop down</b> and click <b>Validate</b>. This will review for errors. Fix any that are indicated.</li> <li>➤ Click the <b>Invoice Actions drop down—Approvals – Initiate</b>. The approver is notified by email.</li> </ul> <div style="text-align: center; margin-top: 20px;">  </div>

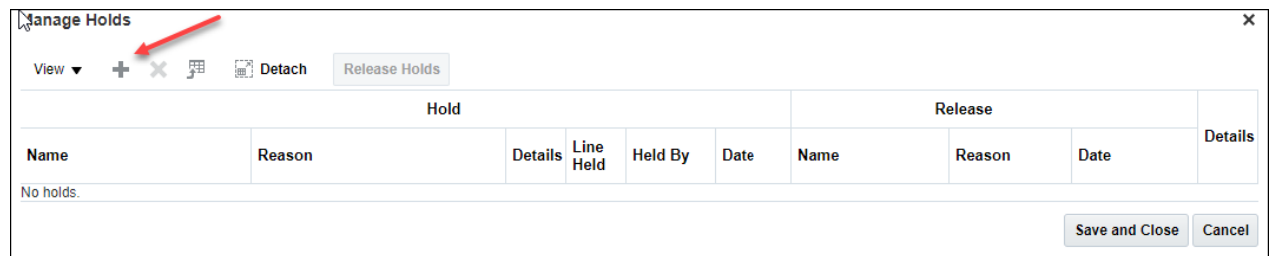
**Now create your Special Request:**

Go to the upper right corner:

- **Actions / EDIT**, then
- **Invoice Action / Manage Holds**.



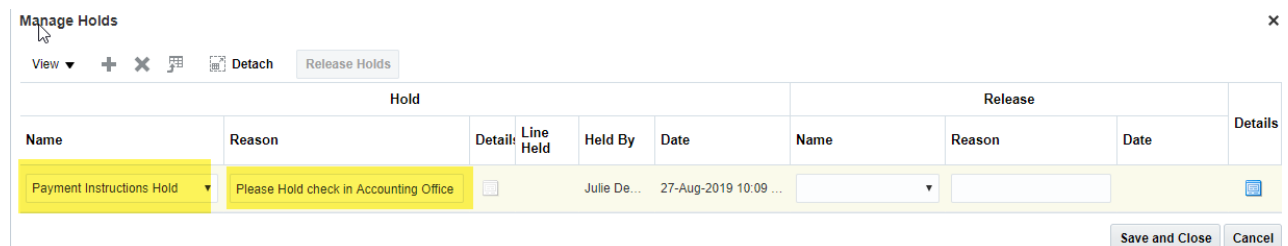
- Use the **PLUS** sign on the popup to add a Hold:



- Enter as follows:

**Name** – **Payment Instructions Hold** (by using the dropdown)

**Reason** - **DELETE** the default text, and add, concisely, exactly what you need AP to do



**1.3 Complete the Hold Information**

Click **SAVE AND CLOSE**

<b>1.3 Finish Invoice</b>	<p>Once the invoice is approved, the check will be picked up in the next scheduled payment run, and your instructions followed. You can check in with your local Finance office to arrange the pickup.</p> <ul style="list-style-type: none"><li>➤ If you need an <b>attachment</b> mailed with the check, please request that the check be held for pickup in the Finance office. Once you have it, you may add the additional documentation to the envelope before mailing or delivering it.</li></ul> <p><b>PLEASE NOTE:</b> due to the Hold, the invoice will go to status “<b>Needs revalidation</b>”. You actually <b>DO NOT</b> have to do anything further – the invoice will go out for approval, and once that is complete, Accounts Payable takes the steps to remove the hold and follow the instructions provided. Please disregard what logically seems to be action you should take.</p>