

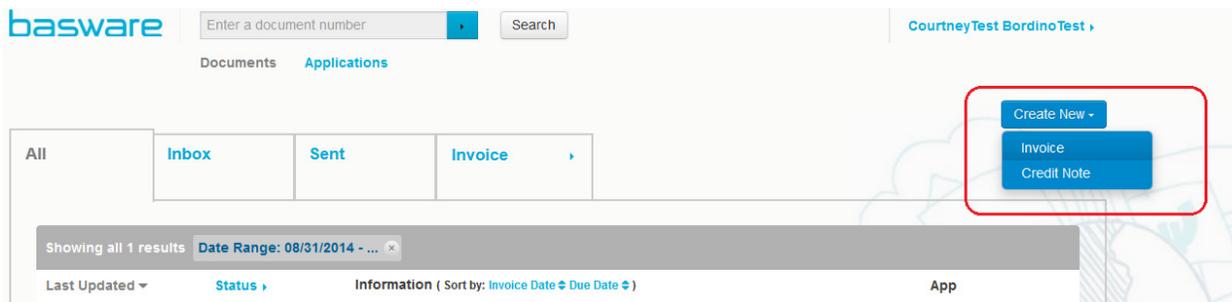
Basware Portal User Guide: Catholic Health Initiatives – Invoice Key In

1. Accessing Basware Portal

Go to: <https://portal.basware.com/>. Enter your username and password. You will then be directed to the home screen.

2. To Create an Invoice

- a. Click **“Create New”** in top right corner and select **“Invoice”**.



- b. On the left side you will search for the Recipient. Type **“Catholic Health”** in the name field and search by clicking the triangle to the right.
 - 1. You can mark the recipient as a favorite by clicking on the star next to the name. Then they will always appear first in the drop down list.



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- c. Some of the required information will auto populate for Catholic Health Initiatives – please do not change any of this information.
- d. On the left side of the screen, you will need to enter the **Delivery Address**
 1. Please enter the shipping address for the corresponding clinic
 2. If the delivery address is the same as the recipient address, then please check the box “Use Recipient’s Address”

Recipient Address

Name
Catholic Health Initiatives ▶

Street
198 Inverness Drive West

City Englewoc State CO ZIP 80112

Country
United States ▼

» Edit Delivery Address

Delivery Address

Use Recipient's Address

Name
[Redacted]

Street
[Redacted]

Postal Code [Redacted] City [Redacted]

Country
Select Country ▼

» Edit Construction Site

Click the check box to use the Englewood CO address (left)

OR

Enter the shipping address of the clinic (right)

Recipient Address

Name
Catholic Health Initiatives ▶

Street
198 Inverness Drive West

City Englewoc State CO ZIP 80112

Country
United States ▼

» Edit Delivery Address

Delivery Address

Use Recipient's Address

Name
CHI Test

Street
123 Main Street

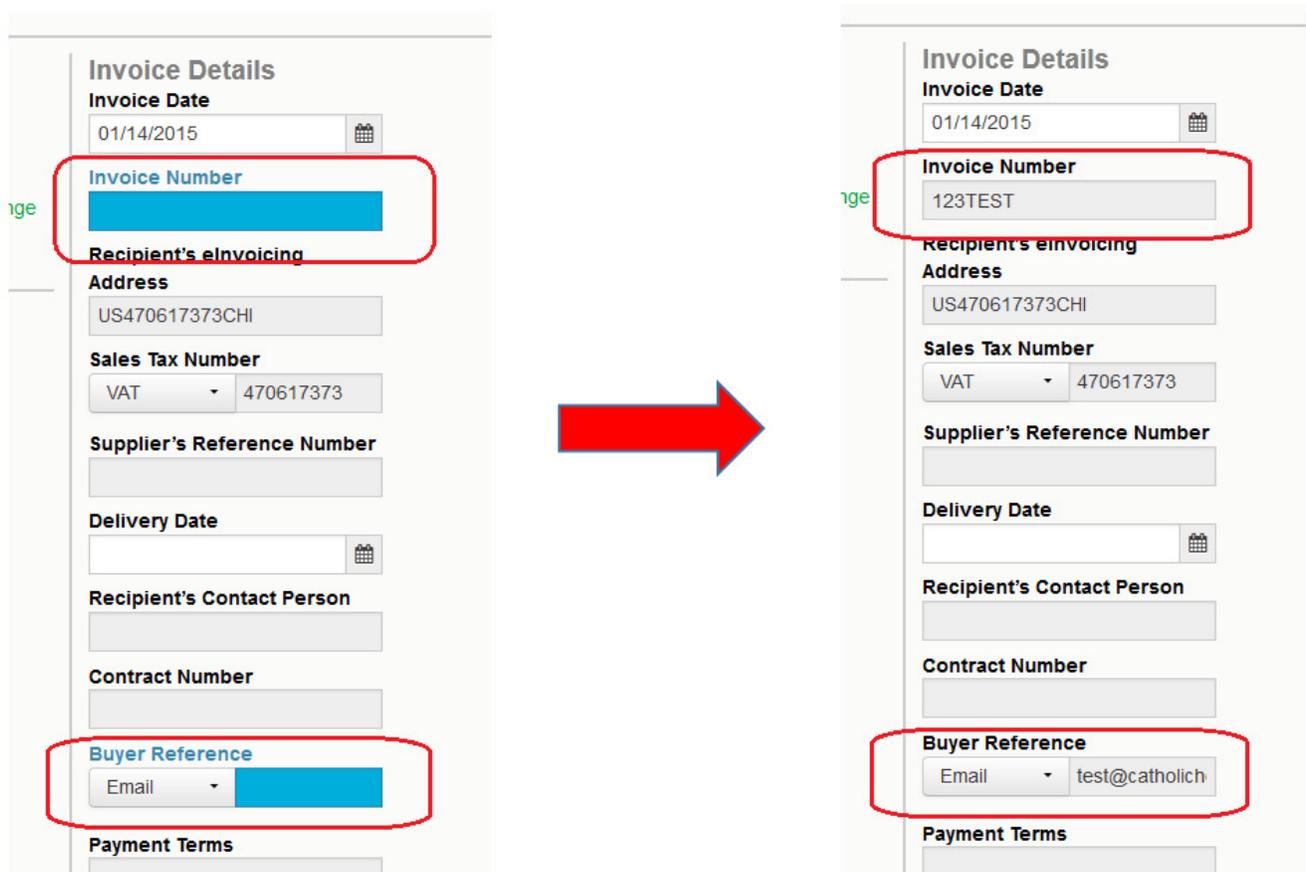
City Anytown State NJ ZIP 07054

Country
United States ▼

» Edit Construction Site

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- e. On the right side of the screen, you will need to enter information into the **Invoice Number** and the **Buyer Reference** fields.
 1. Invoice Number: please enter your invoice number
 2. Buyer Reference: please enter the complete email address of your contact at CHI that will be coding/approving the invoice (For example: adam@catholichealth.net is acceptable. If you enter Adam Jones, that is not acceptable)



- f. Please leave all other fields blank. The above three fields are the only fields which need to be populated by you.

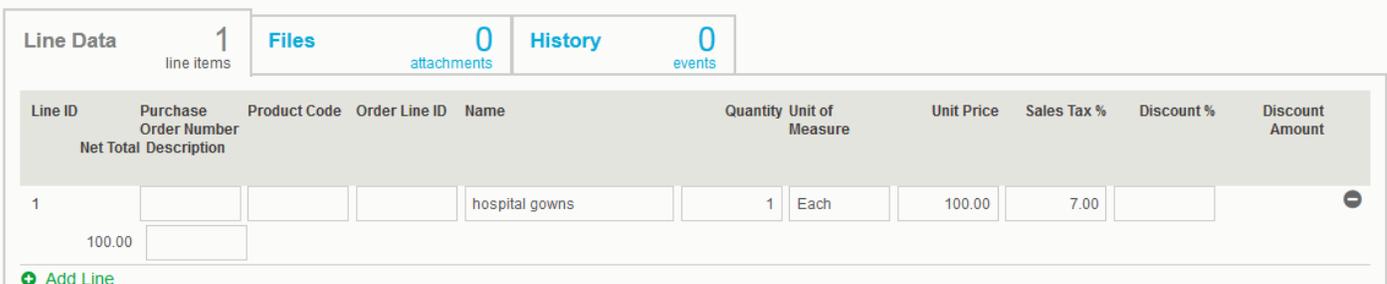
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g. Scroll down the page and click **Add Line**



h. You will need to enter the following information for each invoice line:

1. **Name:** Description of the service/product
2. **Quantity:** Quantity of the service/product
3. **Unit of Measure:** Please type “EA” and select **Each** or “HO” and select **Hour**
4. **Unit Price:** Net amount, format should be **##.##** (please do not add the \$) For items less than a dollar, format should be **#.##** (for example 0.95)
5. **Sales Tax:** Tax percentage rate, format should be **##.##** (please do not add the %)



i. You now can “**Send Invoice**” by clicking the button at the top of the screen.



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3. FAQs and Tips

Organization ID

When registering you provided your Tax ID as the Organization ID. Please ensure you follow the below instructions before submitting any invoices.

1. Log in to the Basware Portal
2. Click on your **Username** (top right in blue) then select **My Organization**.
3. Then select **Edit** (in green).
4. Go to the Organization Identifier section
5. The following information is mandatory:
 - a. Select **TIN** in the drop down box.
 - b. Enter your **Tax ID** (TIN) in the box to the right.



Organization's Identifiers + Add Identifier

TIN 12-1212121 ? -

6. Then click **Save Changes**
7. To return to the home screen, click **Basware** in the top left corner

Add User

Please follow the below instructions if you'd like to add a user to your account.

1. Main user logs in to the Basware Portal
2. Click on your **Username** (top right in blue) then select **My Organization**.
3. Then select **More Actions** and **Add User**.
5. Then fill in the required information for the new user:
 - a. Email Address
 - b. User Name (should be the email address)
 - c. Select the Language
6. Then click **Save Changes**
7. The user will receive an email address to confirm their account.
8. To return to the home screen, click **Basware** in the top left corner

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Support

If you have questions about the CHI invoice transition, please email:

CHIaccounts payable@catholicealth.net

If you have questions during the registration process, please visit our [Knowledgebase](#) and utilize the chat option.

If you have questions about the Basware Portal/entering your invoices for CHI into the Basware Portal:

Click the “help” box in the bottom right corner of the Basware Portal to chat with a support agent.

Filters/Searches

There are different search and filtering options within the Basware Portal.

Please ensure if you are looking for a specific document, you ensure the date filter is not on. You can remove it by clicking the “x” next to the date range – see below.

