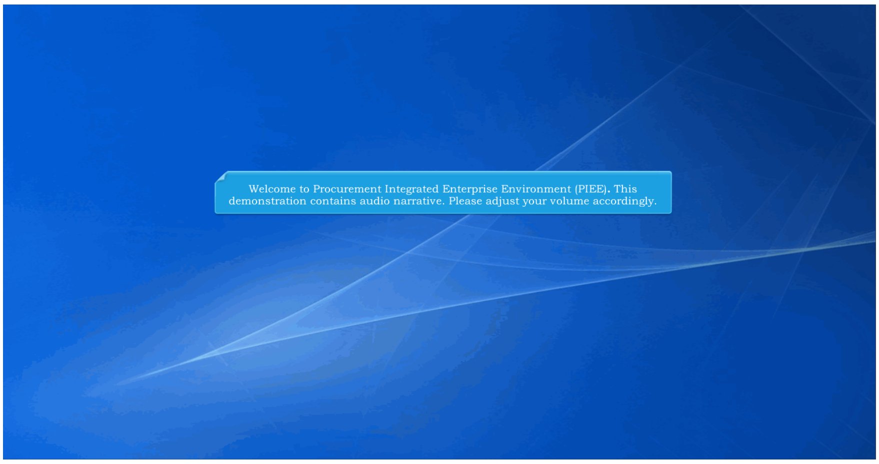
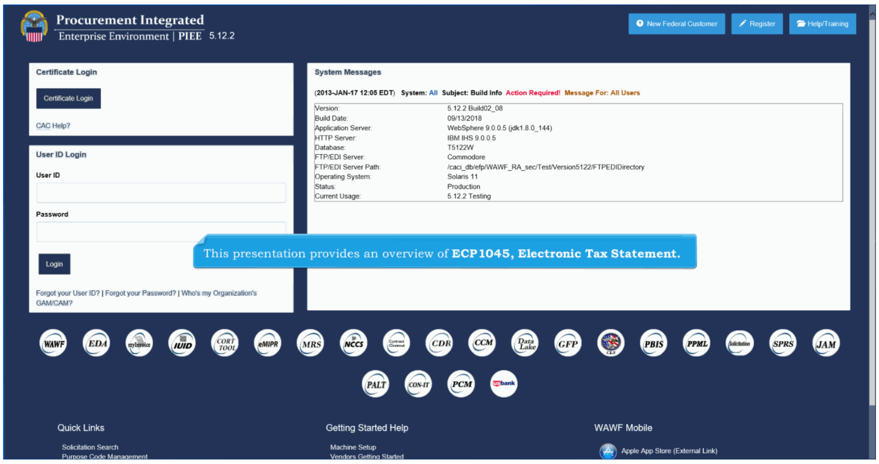
Intro



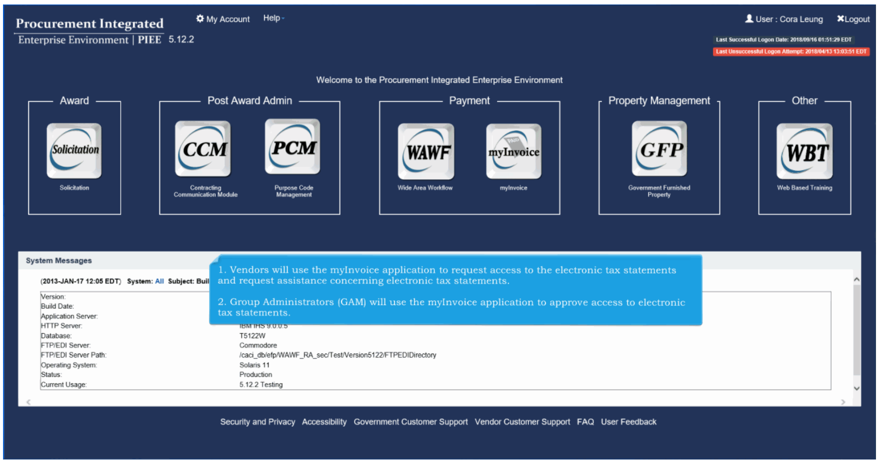
Welcome to Procurement Integrated Enterprise Environment (PIEE). This demonstration contains audio narrative. Please adjust your volume accordingly.

Step 1



This presentation provides an overview of ECP1045, Electronic Tax Statement.

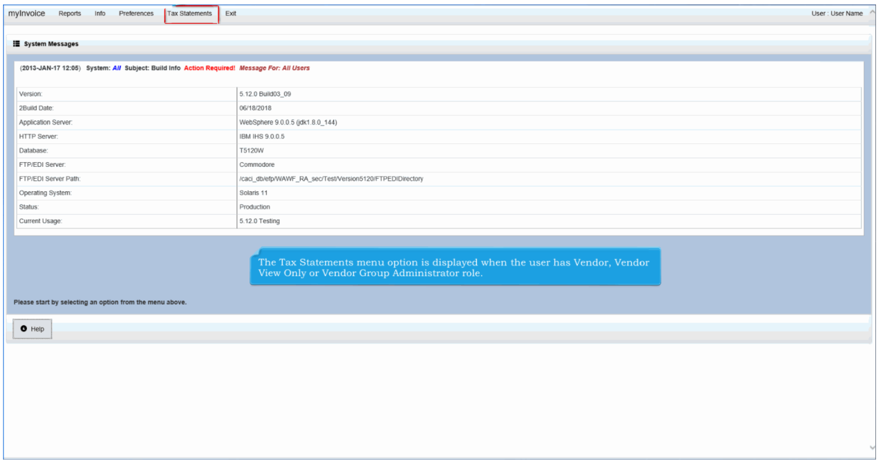
Step 2



1. Vendors will use the myInvoice application to request access to the electronic tax statements and request assistance concerning electronic tax statements.

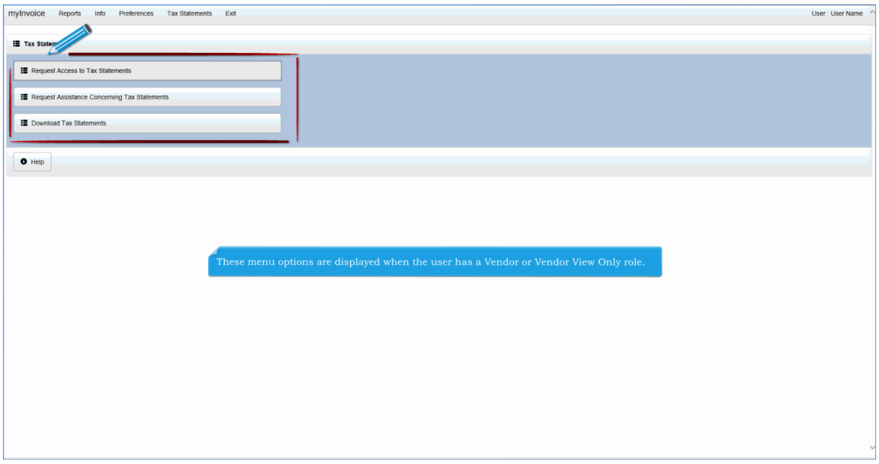
2. Group Administrators (GAM) will use the myInvoice application to approve access to electronic tax statements.

Step 3



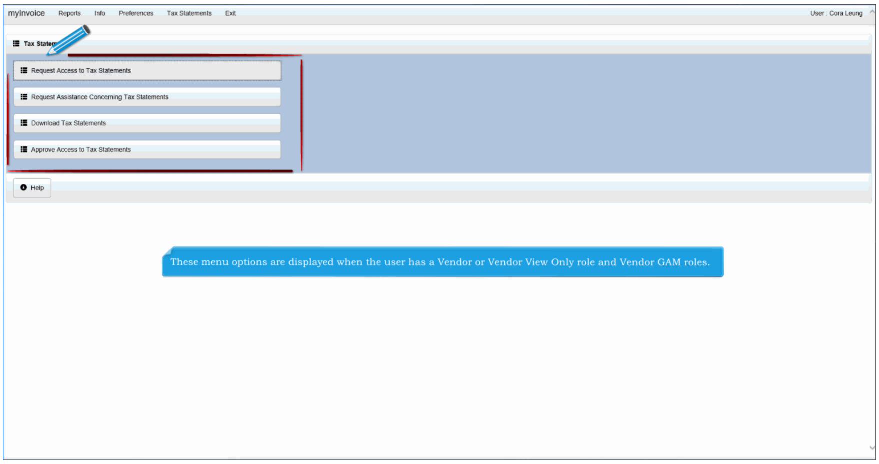
The Tax Statements menu option is displayed when the user has Vendor, Vendor View Only or Vendor Group Administrator role.

Step 4



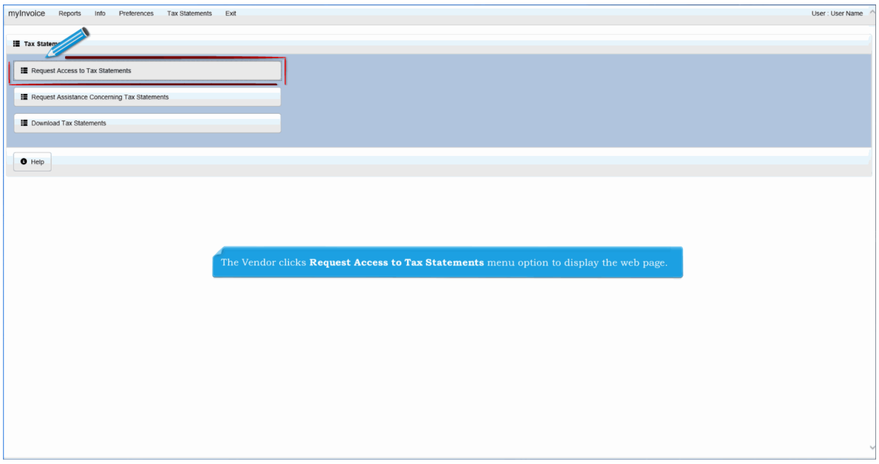
These menu options are displayed when the user has a Vendor or Vendor View Only role.

Step 5



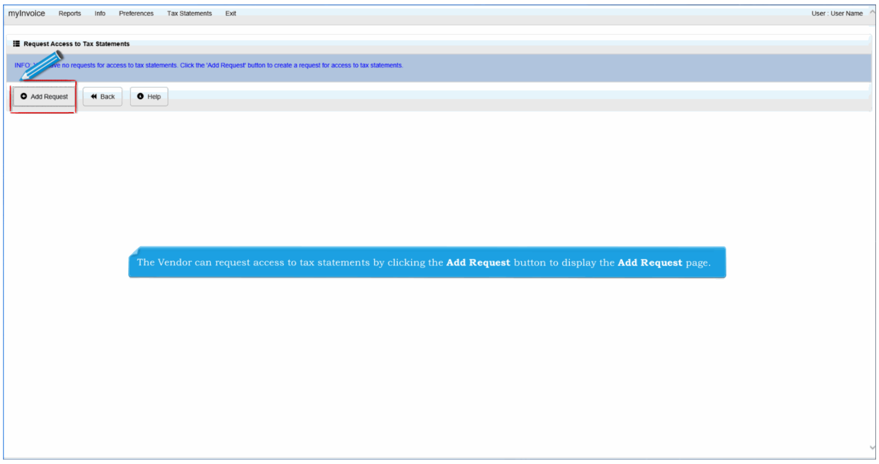
These menu options are displayed when the user has a Vendor or Vendor View Only role and Vendor GAM roles.

Step 6



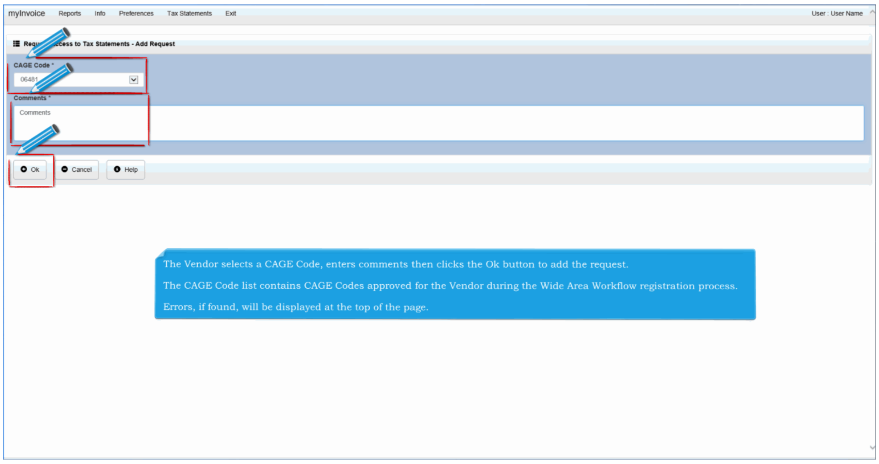
The Vendor clicks Request Access to Tax Statements menu option to display the web page.

Step 7



The Vendor can request access to tax statements by clicking the Add Request button to display the Add Request page.

Step 8

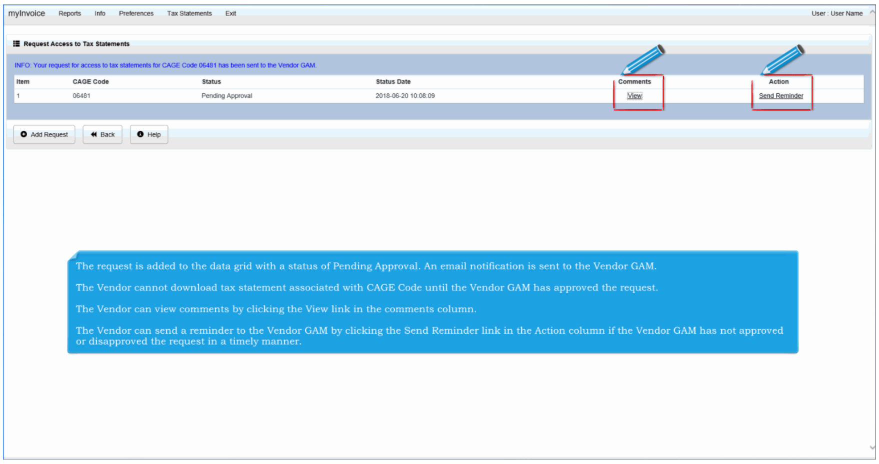


The Vendor selects a CAGE Code, enters comments then clicks the Ok button to add the request.

The CAGE Code list contains CAGE Codes approved for the Vendor during the Wide Area Workflow registration process.

Errors, if found, will be displayed at the top of the page.

Step 9



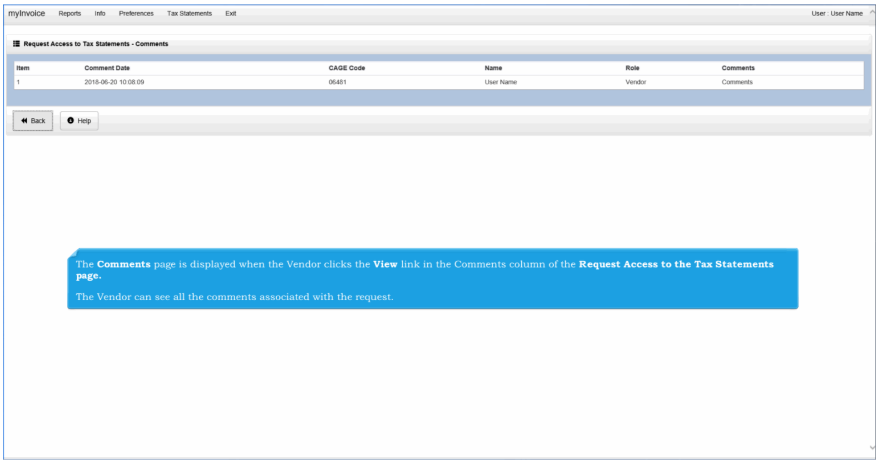
The request is added to the data grid with a status of Pending Approval. An email notification is sent to the Vendor GAM.

The Vendor cannot download tax statement associated with CAGE Code until the Vendor GAM has approved the request.

The Vendor can view comments by clicking the View link in the comments column.

The Vendor can send a reminder to the Vendor GAM by clicking the Send Reminder link in the Action column if the Vendor GAM has not approved or disapproved the request in a timely manner.

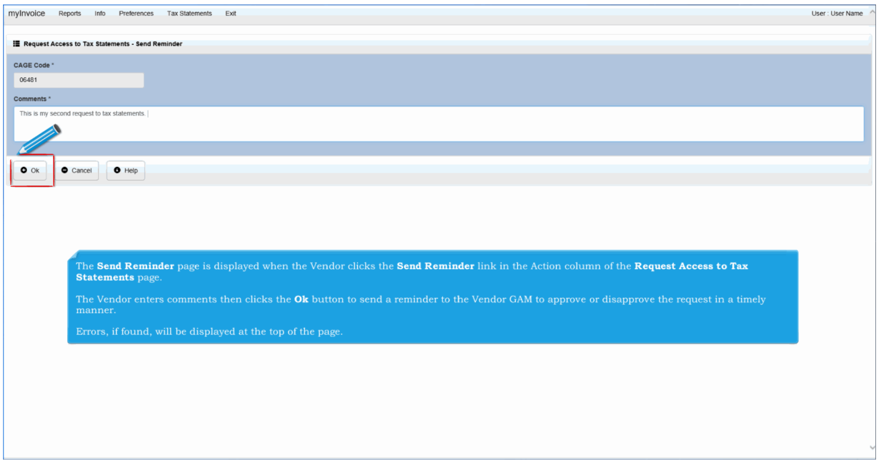
Step 10



The Comments page is displayed when the Vendor clicks the View link in the Comments column of the Request Access to the Tax Statements page.

The Vendor can see all the comments associated with the request.

Step 11

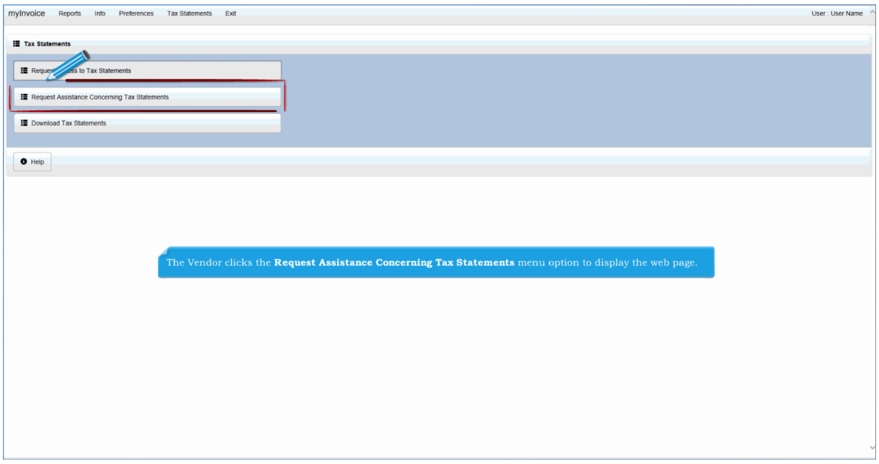


The Send Reminder page is displayed when the Vendor clicks the Send Reminder link in the Action column of the Request Access to Tax Statements page.

The Vendor enters comments then clicks the Ok button to send a reminder to the Vendor GAM to approve or disapprove the request in a timely manner.

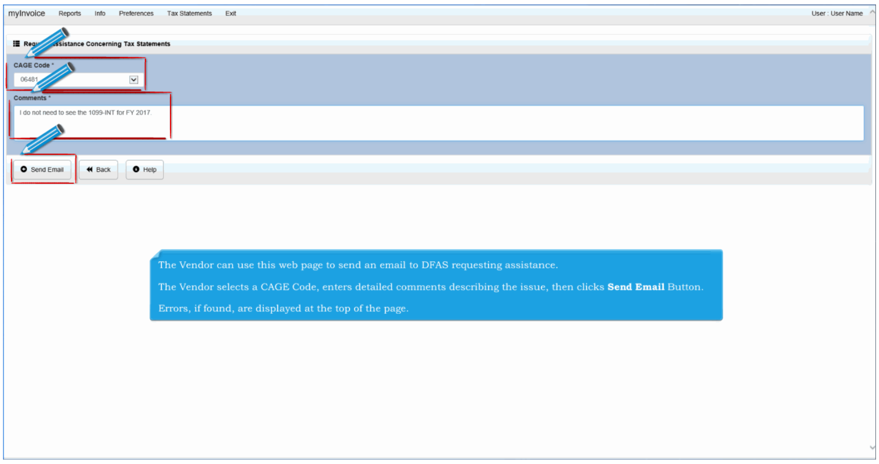
Errors, if found, will be displayed at the top of the page.

Step 12



The Vendor clicks the Request Assistance Concerning Tax Statements menu option to display the web page.

Step 13

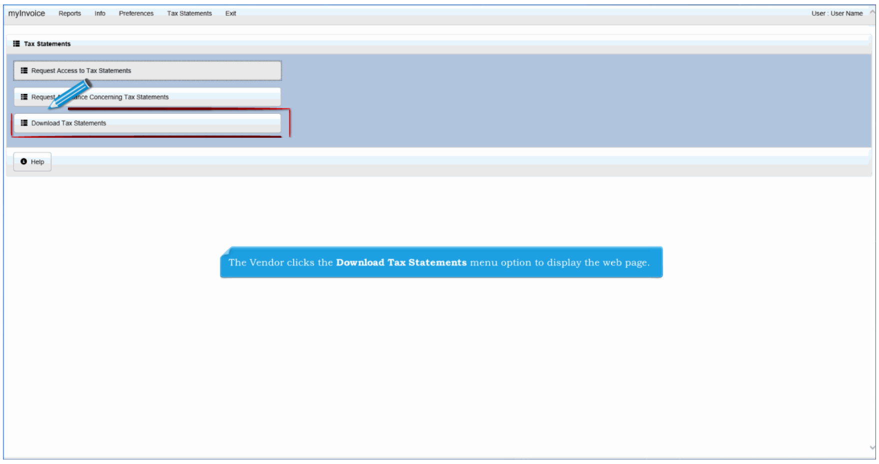


The Vendor can use this web page to send an email to DFAS requesting assistance.

The Vendor selects a CAGE Code, enters detailed comments describing the issue, then clicks Send Email Button.

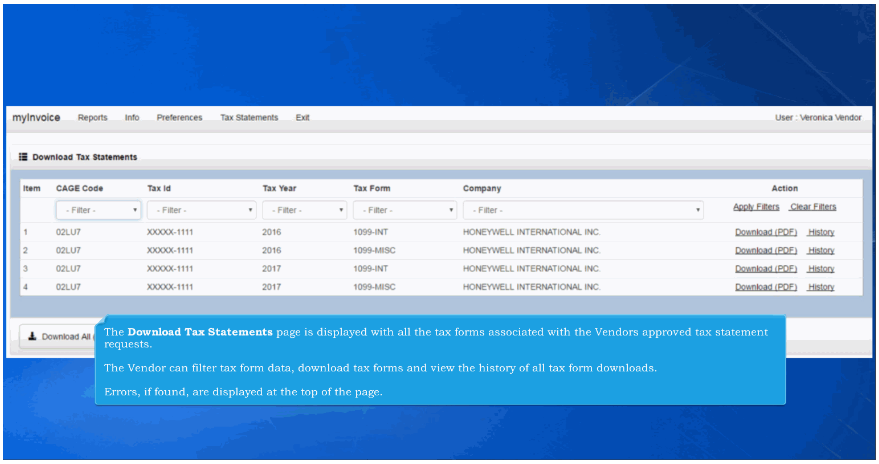
Errors, if found, are displayed at the top of the page.

Step 14



The Vendor clicks the Download Tax Statements menu option to display the web page.

Step 15

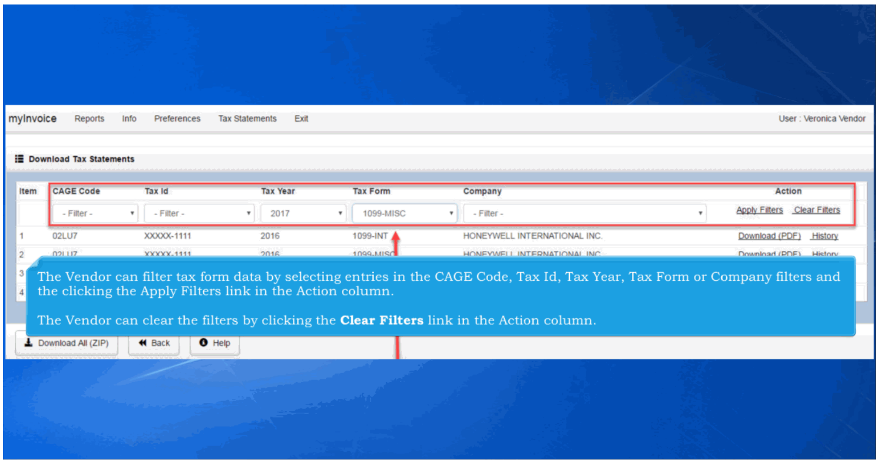


The Download Tax Statements page is displayed with all the tax forms associated with the Vendors approved tax statement requests.

The Vendor can filter tax form data, download tax forms and view the history of all tax form downloads.

Errors, if found, are displayed at the top of the page.

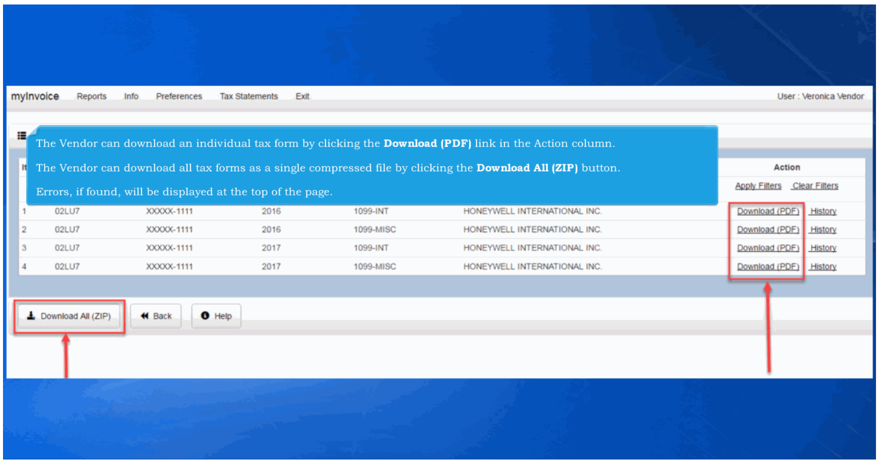
Step 16



The Vendor can filter tax form data by selecting entries in the CAGE Code, Tax Id, Tax Year, Tax Form or Company filters and the clicking the Apply Filters link in the Action column.

The Vendor can clear the filters by clicking the Clear Filters link in the Action column.

Step 17

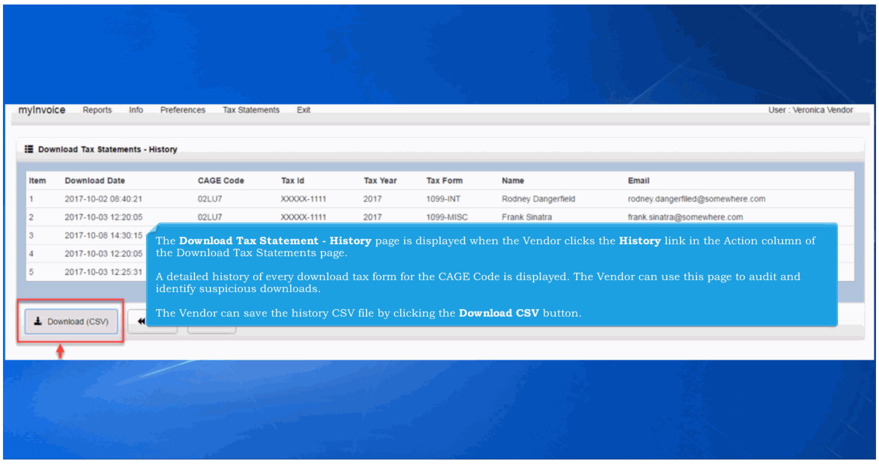


The Vendor can download an individual tax form by clicking the Download (PDF) link in the Action column.

The Vendor can download all tax forms as a single compressed file by clicking the Download All (ZIP) button.

Errors, if found, will be displayed at the top of the page.

Step 18

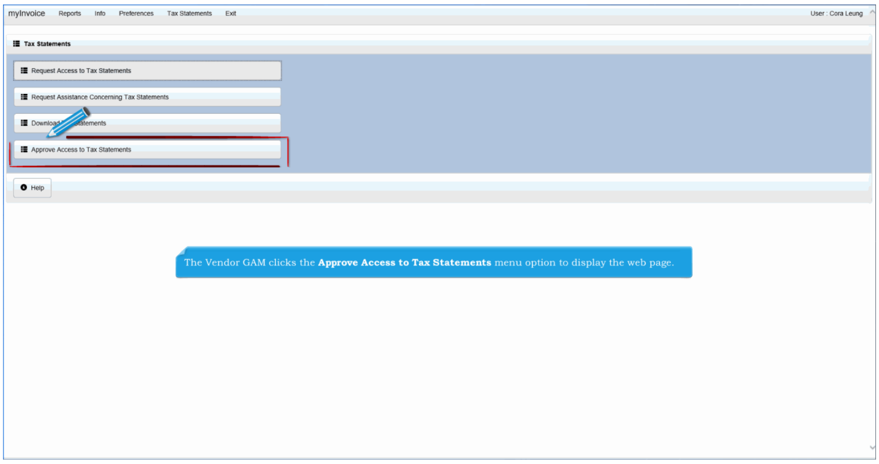


The Download Tax Statement - History page is displayed when the Vendor clicks the History link in the Action column of the Download Tax Statements page.

A detailed history of every download tax form for the CAGE Code is displayed. The Vendor can use this page to audit and identify suspicious downloads.

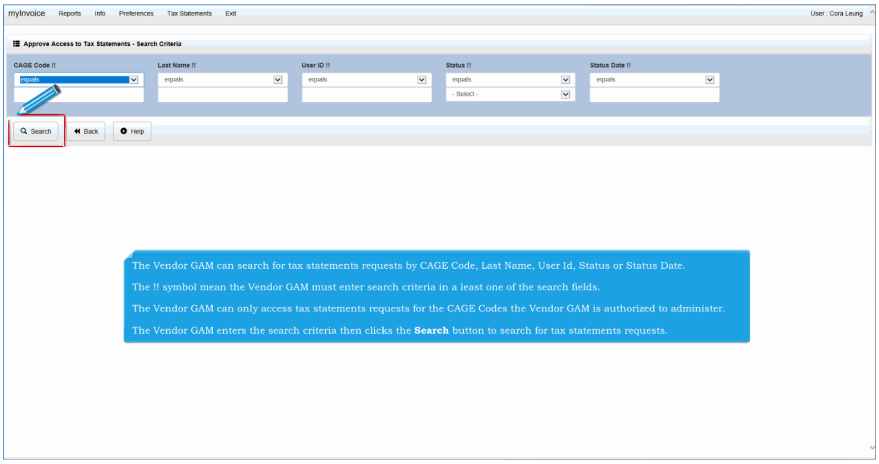
The Vendor can save the history CSV file by clicking the Download CSV button.

Step 19



The Vendor GAM clicks the Approve Access to Tax Statements menu option to display the web page.

Step 20



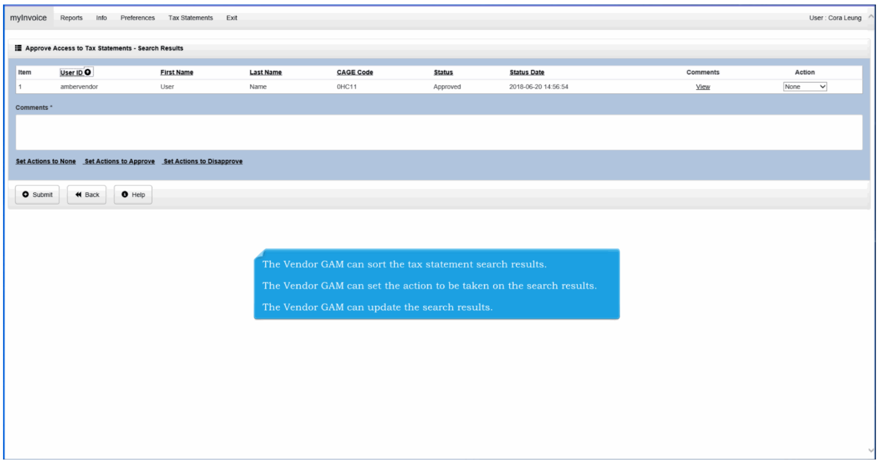
The Vendor GAM can search for tax statements requests by CAGE Code, Last Name, User Id, Status or Status Date.

The !! symbol mean the Vendor GAM must enter search criteria in a least one of the search fields.

The Vendor GAM can only access tax statements requests for the CAGE Codes the Vendor GAM is authorized to administer.

The Vendor GAM enters the search criteria then clicks the Search button to search for tax statements requests.

Step 21

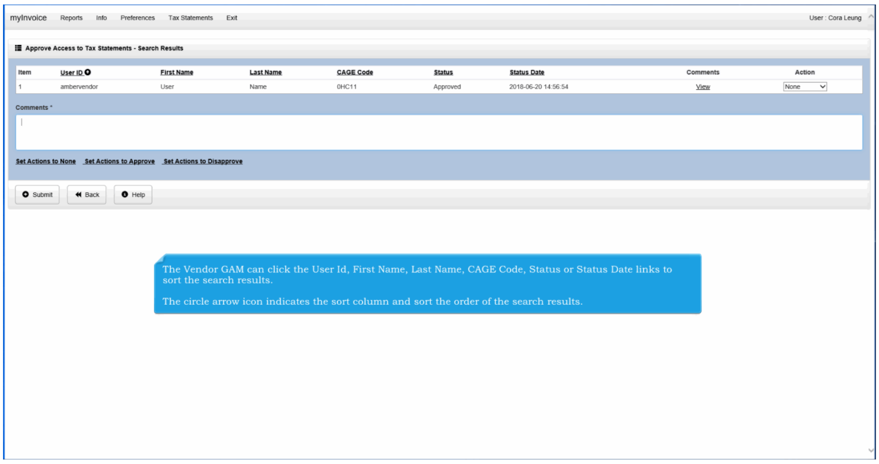


The Vendor GAM can sort the tax statement search results.

The Vendor GAM can set the action to be taken on the search results.

The Vendor GAM can update the search results.

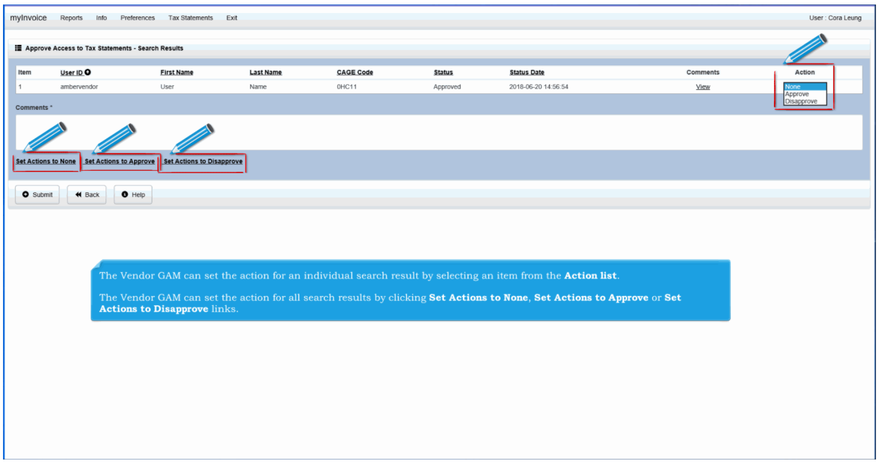
Step 22



The Vendor GAM can click the User Id, First Name, Last Name, CAGE Code, Status or Status Date links to sort the search results.

The circle arrow icon indicates the sort column and sort the order of the search results.

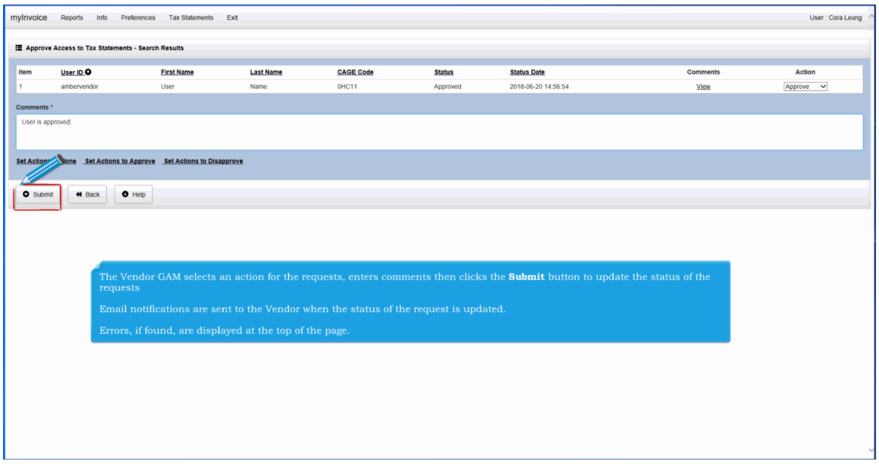
Step 23



The Vendor GAM can set the action for an individual search result by selecting an item from the Action list.

The Vendor GAM can set the action for all search results by clicking Set Actions to None, Set Actions to Approve or Set Actions to Disapprove links.

Step 24

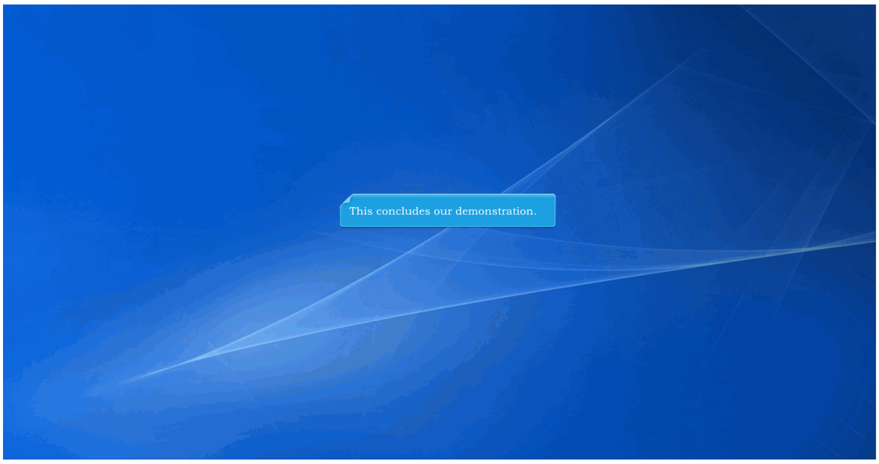


The Vendor GAM selects an action for the requests, enters comments then clicks the Submit button to update the status of the requests

Email notifications are sent to the Vendor when the status of the request is updated.

Errors, if found, are displayed at the top of the page.

End



This concludes our demonstration.