Service Provider Billing (SPB) Document in KFS

Currently utilizing:
- IPF Billing – February 2016
- Telecom – August 2016
- University Services – October 2016
- More to follow

 Highlights:
1) Can add or modify all sub string elements on the accounting line
2) Can add or remove accounting lines as long as the sub total by object code remains the same
3) Can change the Account Number or add new Account Numbers as long as they belong to the Fiscal Officer/Delegate. (It is encouraged to notify IPF of these types of changes.)
4) Can copy either the Account Number or the IPF reference in the Line Description field and click on the link provided in the “XXX” section to search for greater information on the IPF customer statement site.
5) Can do nothing and wait until the document auto approves after 5 calendar days
6) Can have account delegates take action on your behalf
7) Can ad hoc route the document. (Keep in mind no one can disapprove.)
8) Can add Notes/Attachments consistent with other FP documents

 What you can’t do:
1) Cannot disapprove the document
2) Cannot change to an Account that does not belong to the current Fiscal Officer
3) Cannot change the document total
4) Cannot change the object code sub totals
5) Cannot change the asset number
6) Cannot change the description or explanation fields

 Tips:
Too many notifications? – Remember that in your Action List there is a “Preferences” button toward the upper right. Once clicked, scroll to the bottom and you can change your notification preferences specifically for the “SPB” document type through “Document Type Notifications”.
**Too many documents in your action list?** – Most Fiscal Officers should receive 5 or less documents a month. However, if your action list is bogged down with these new documents and you want to reduce what you see in your action list, your options are to

1) Approve the documents
2) Wait the 5 calendar days until they auto approve and are removed from your action list
3) Set a filter in your action list to exclude the “SPB” document type. (Filter image shown below)

![Action List Filter](image)

**Only want to review or modify certain documents?**
If you have many “SPB” documents in your action list, but only want to review those with a certain criteria such as Account or Object Code, the “doc search” has been customized to allow a user to search for just the SPB documents they are interested in. You may also save these search criteria by entering a name in the “Name this Search” field, which will then be in the “Searches” drop down menu.

![Document Search](image)

**Contact for Questions:**
For any questions related to this new document you may contact the Accounting Office at (517) 355-5000 or contact the Service Desk at 517-432-6200 or ithelp@msu.edu.