

# Advocate Health – Workday Bill Only App Welcome and Guide

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## Contents

Welcome to Advocate Health’s New Workday Bill Only App .....	3
Why Are We Making This Change? .....	3
What’s Changing? .....	3
Key Information to Know .....	4
What’s Not Changing? .....	5
Expected Challenges .....	5
I’m a New Rep – How Do I Get Access?.....	7
How to Enter a New Bill Only Requisition .....	8
Requesting a New Item to Be Built.....	13
Pricing Discrepancies and How to Handle .....	16
How Do I Print My PO?.....	17
Common Support Needs – “How Do I Get Help?” .....	19
Navicent Cost Center Lookup.....	20
Bill Only Order Supplier View .....	20

## Welcome to Advocate Health's New Workday Bill Only App

We're excited to welcome you to Advocate Health's new Bill Only Requisition Application, designed to make your experience with bill-only purchasing smoother, more transparent, and more efficient. This app uses Workday's supplier portal, where you will register for an account and have full access to enter requisitions for completed Bill Only cases, as well as monitor the status of those orders in real time as it flows through our purchase order and invoicing processes.

### Why Are We Making This Change?

The bill-only process controls hundreds of millions in annual spend for Advocate, but until now, it's relied heavily on manual entry, emails, and tribal knowledge. This led to frequent questions like "What is the status of that purchase order?" and made tracking and compliance challenging. Our new app, built on Workday, is here to standardize and automate these workflows, reducing manual work and increasing visibility for everyone involved, including you as the supplier rep. No longer will you have to email anyone regarding the status of your order; you will be able to log in and see it in real time.

We're piloting this process at Advocate Health Navicent in Macon, GA, with plans to roll it out enterprise-wide by the end of the year. Our goal is to ensure compliance, efficiency, and timely payment processing for all bill-only cases.

### What's Changing?

- **Self-Service Portal:** You'll now be able to enter, review, validate, and monitor all aspects of the bill-only process directly in the app.
- **Automated Tracking:** Every requisition, purchase order, and invoice is visible in real time—no more waiting for email updates.
- **Streamlined Requests:** You can request new items directly through the system, with a quick turnaround for item creation and notification.
- **Clear Routing:** Approvals and validations follow existing flows, but with improved transparency and fewer manual steps.
- **Support and Guidance:** If you have questions, our Procurement Resource Team and Data Management Team are ready to help. You'll receive ticket numbers for tracking any issues, and our teams will resolve them promptly.

### Key Information to Know

- **Scope:** Bill only orders only. These are purchases where the PO is created only for invoicing and payment after a case. This portal is not designed to handle consignment orders. Bill only PO's are for products specific to a case and are not for stocked inventory or consigned inventory.
- **Access:** You'll receive a welcome email with instructions to register and select your authenticator app. Once logged in, you can begin entering requisitions and tracking them in real time.
- **Requisition Process:** Initiate requisitions by selecting your company details and entering procedure information. Approvers will verify against Epic before processing.
- **Bill Only Timing:** It is still expected that bill only requisitions are entered within 24 hours after case completion. We understand

that requesting new items may delay, but please make every effort to enter within that time period.

- **Support Contacts:** For PO questions, contact the Procurement Resource Team (ASC-Procurement-Resource@aah.org). For item or pricing issues, reach out to Data Management (data.management.team@aah.org).
- **Compliance:** All bill-only items must be in the item master to order. Validation against Epic remains required, and governance and clinical approvals are unchanged.
- **Feedback:** We value your input! Please share feedback on the landing page experience and any suggestions for usability improvements.

### What's Not Changing?

- Governance, approvals, and clinical validation remain intact. The use of products still falls within the policies of Advocate Health regarding the use of non-approved or non-contracted items. Every item is subject for review before approval of order.
- No backdoor purchasing paths—compliance is still a priority.
- The process for handling new item requests and value analysis committee requirements continues as before.

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Thank you for partnering with us during this transition. Our team is here to support you every step of the way. The following page details the support model in place as you begin working in this new app.

### Expected Challenges

The Advocate Health team has worked hard to customize the app to meet the needs of all involved. That said, there are some current known limitations at go-live. Please read these carefully:

### **1. Supplier Reps Who Sell Products from Multiple Suppliers**

a. An example here is a representative who sells products across multiple manufacturers, such as Stryker, Smith and Nephew, Depuy Synthes, and Medtronic.

**b. For each unique supplier in Advocate Health's supplier master, will require you to have a unique email for login.**

We understand that this can be a challenge, especially if each individual manufacturer does not give you an email address.

### **2. Unique Requisition, PO, and Invoice Required for Each Supplier**

a. In the instance where the procedure uses products across multiple suppliers (as defined by the current setup in Advocate Health's item master), the supplier representative must enter a unique requisition for each supplier.

b. An example – you are a representative for Stryker.

Unfortunately, many products in the Stryker catalog are required to be spread across multiple Stryker divisions – Stryker Spine, Stryker Instruments, Stryker Ortho, etc. If the case you finished contains products that cross those suppliers, you will have to enter a requisition for one, submit, then log out and log back in as the other supplier and enter another requisition. Invoicing will need to follow the two or more distinct purchase orders created through this supplier-specific process.

c. If you feel an item is set up under the wrong supplier, submit a request to [data.management.team@aah.org](mailto:data.management.team@aah.org) to review and make changes to simplify.

## I'm a New Rep – How Do I Get Access?

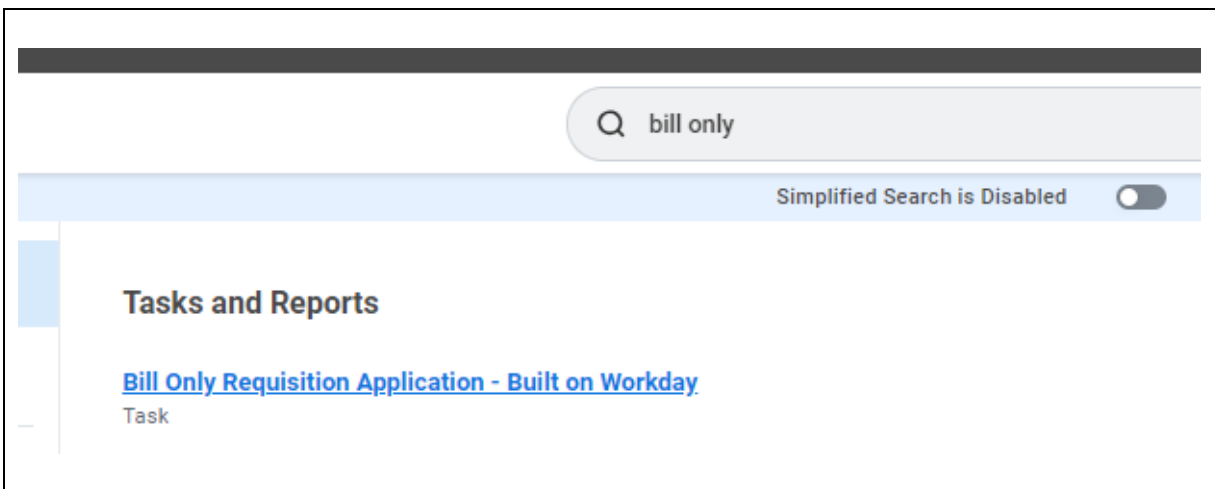
If you are a new rep or determine you need a new account in our portal, follow these steps:

1. Provide the following information to your Advocate Health contact within the OR, Cath Lab, etc. that you are servicing:
  - a. Your Name
  - b. The supplier/manufacturer of the products you are submitting a bill only for (e.g. Johnson & Johnson, Medtronic USA, Smith and Nephew, Etc.)
  - c. Your business email address
  - d. Your best phone number
2. The Advocate Teammate emails [vmo@aah.org](mailto:vmo@aah.org) with this info, putting **#billonly** in the subject line. This helps with prioritization and routing to the correct team. **Note: emails directly from the rep will be denied. This needs to come from an Advocate teammate.**
3. VMO will build the representative as a Supplier Contact in Workday.
4. A Workday Security admin will enable the Supplier Contact for Workday's portal.
5. This will generate a welcome and registration email to the representative.
6. The rep completes the registration, creating their portal account.
7. A Workday Security admin then will add the rep to the correct security group, giving the rep access to the **Bill Only Requisition Application - Built on Workday** app.
8. The rep will receive an email indicating their account is ready for bill only requisitioning.

## How to Enter a New Bill Only Requisition

### Bill Only Application – Step by step instructions:

1. Login to Bill Only Application as a Supplier using <supplier user id> <password>
2. Search for task “**Bill Only Requisition Application - Built on Workday.**”



3. Click on the task opens the Bill Only Requisitions home page.  
Two actions can be performed by the Supplier.
  - Click on **Create Requisition** button takes Supplier to Create Bill Only Transaction data entry page.
  - Supplier can view the past transactions in the “**All Past Requisitions**” grid. It provides the complete lifecycle status of Bill Only transactions here.
    - Requisition Status
      - “In Progress” means the transaction is created by the supplier.
      - “Successfully Completed” means transaction is approved by the OR Clerk and ready to be sourced to PO.
    - Purchase Orders and Status
      - “Approved” means PO is approved and ready to be issued
      - “Issued” means PO is issued
      - “Fully Invoiced” means Invoice is fully invoiced.
      - “Unpaid” means supplier payment status is not paid.
      - Note: Receiving status is not a valid status for Bill Only Transaction

Bill Only Requisitions											
<a href="#">Create Requisition</a>											
All Past Requisitions 113 of 121 items											
Requisition ID	Requested By	Created Date	Requisition Status	Edit Requisition	Procedure	Procedure Number	Physician ID	Requisition Items	Total Cost	Purchase Orders and Statuses	Invoices
REQ-7101	Zimmer Contact	15-Nov-2024	Successfully Completed		Knee Implant	PN12345	Doe John	KNEE PLATE	\$50.00	PO-4062 - Issued	Supplier Invoice: 19532 - KNEE PLATE - 50
REQ-7100	Zimmer Contact	15-Nov-2024	Canceled		Knee Surgery	PN12345	Doe John	KNEE ART SURF LT	\$2,142.00	Payment Status - Unpaid	Invoicing Status - Fully Invoiced
REQ-7099	Zimmer Contact	15-Nov-2024	Successfully Completed		Knee Surgery	PN123	Doe John	KNEE PLATE	\$50.00		
REQ-7098	Zimmer Contact	30-Oct-2024	Successfully Completed		Knee Surgery	PRN101010101	Doe, J	KNEE PLATE	\$50.00	PO-4069 - Draft	

4. Click on “Create Requisition” button to start Bill only transaction.

### Enter header information – Company, Ship To, Department

Create Bill Only Requisition

Requested By: Zimmer Contact

Buyer: Teresa Serrano

Company: \*

Ship To: \*

Department: \*

Requisition Type: External Bill Only

Currency: USD

Entered By: \*

**Contact your local facility rep for this info. This is important for proper accounting and budgeting.**

**Company** = Three digit number (e.g., 145)  
**Ship To** = Will default in. No need to enter.  
**Department** = Also called “Cost Center”. Format will be XXX-XXXX XXXXX (e.g., 145-0145 37703)  
**Entered By** = Will be your name. Do not change.

**Additional procedure** date, Procedure Number, Procedure, Patient ID (patient 3 initials) Medical Record Number (Note: MRN will not be saved in delivered requisition page), Physician Name,

**Procedure verified by** – The Advocate teammate who signed off on the Bill Only sheet.

**Procedure Information**

Procedure Date:

Procedure Number:

Procedure:

Patient Id:

Medical Record Number:

Physician Id:

Procedure Verified By:

Supplier Representative:

Additional Procedure Details:

**Item:** Enter items consumed in procedure. You can search using Item Description, MFG Number or Supplier Item Number. Search with and without special characters (like dashes, dots, etc.) for best results.

**Quantity:** Enter the total quantity consumed in procedure.

**Lot Number:** Enter the applicable Lot Number. Enter NA if not applicable

**Serial Number:** Enter the applicable Serial Number. Enter NA if not applicable

Goods Lines

2 items











*Item	Quantity	Unit Details	Extended Amount	Lot and Serial Number	Memo
X KNEE ART SURF LT	1	Unit Of Measure: Each Unit Price: 2142	2142	Supplier: ZIMMER BIOMET Manufacturer: ZimmerBiomet Lot Number: * LOT444 Serial Number: * SER444	
X KNEE PLATE	1	Unit Of Measure: Each Unit Price: 50	50	Supplier: ZIMMER BIOMET Manufacturer: ZimmerBiomet Lot Number: * LOT111 Serial Number: * SER111	
	2		2192		

If item is not available for choosing, complete a New Purchase Item Request (see section of requesting a new item in Table of Contents)

Upload procedure **attachment(s) of the bill only sheet/sticker sheet/case sheet.**  
 This will be used during internal approval to make sure all items are accounted for and

match Epic documentation. – # of attachment **up to 5**, valid format is **pdf's** or **image** can be uploaded.

Procedure Attachment (pdf or image files only) (Max 5 Nos.)

-  billonly\_sample\_005.pdf 
-  billonly\_sample\_004.pdf 
-  billonly\_sample\_003.pdf 
-  billonly\_sample\_002.pdf 
-  billonly\_sample\_001.pdf 

**Declaration** – Check the attest button, verify certification date (defaulted to today's date)

DECLARATION

This is to certify that the information provided above is true to the best of my knowledge and belief.

Attest

Certification Date \*  

Powered by Workday Extend - Built on Workday by Huron Consulting Group

**Actions**

- Click on **Submit** button completes the transaction.
- Click on **Save for Later** if there is a need to get items created, supplier is not ready to submit the transaction, etc. Supplier can login later and select the transaction to take further action from “All Past Transactions” grid on the home page.
- Click on **Cancel** button cancel's the transaction.


Click on Submit button **successfully creates the Bill Only transaction**. (Note: The Requisition number). Click takes you back to home page to view the life cycle status of the Bill Only transaction. Requisition status is **“In Progress”** meaning the requisition has been successfully created and ready to be sourced to become PO. You can check the Requisition status in the “All Past Transactions” grid of the home page.

**Bill Only Requisitions**

Create Requisition

All Past Requisitions 122 items

	Requisition ID	Requested By	Created Date	Requisition Status	Edit Requisition	Procedure	Procedure Number
...	REQ-7160	Zimmer Contact	07-Apr-2025	In Progress			
...	REQ-7159	Zimmer Contact	04-Apr-2025	Successfully Completed			
...	REQ-7158	Zimmer Contact	04-Apr-2025	In Progress		Knee Replacement	PRN111



**Requisition Created Successfully**

Your reference number is "REQ-7160"

### 5. View “All Past Transactions”

**Bill Only Requisitions**

Create Requisition

All Past Requisitions 122 items

	Requisition ID	Requested By	Created Date	Requisition Status	Edit Requisition	Procedure
...	REQ-7160	Zimmer Contact	07-Apr-2025	In Progress		Knee Surgery
...	REQ-7159	Zimmer Contact	04-Apr-2025	Successfully Completed		Knee Replacement
...	REQ-7158	Zimmer Contact	04-Apr-2025	In Progress		Knee Replacement

You can view requisition by clicking on the ... dots

**View Requisition - REQ-7160**

Requested By: Zimmer Contact  
 Buyer: Teresa Serrano  
 Company: Global Modern Services, Inc. (USA)  
 Ship To Address: 200 East Randolph Street Aon Center, Chicago, IL 60605, United States of America  
 Department: 61335 Surgery  
 Requisition Type: External Bill Only  
 Currency: USD  
 Entered By: Zimmer Contact

**Procedure Information**

Procedure Date: 04/07/2025  
 Procedure Number: PN10102  
 Procedure: Knee Surgery  
 Medical Record Number: MRN102340  
 Physician Name: Doe, J  
 Procedure Verified By: Sara Goldstein  
 Additional Procedure Details: (empty)  
 Goods Line Subtotal: 2,192.00 USD

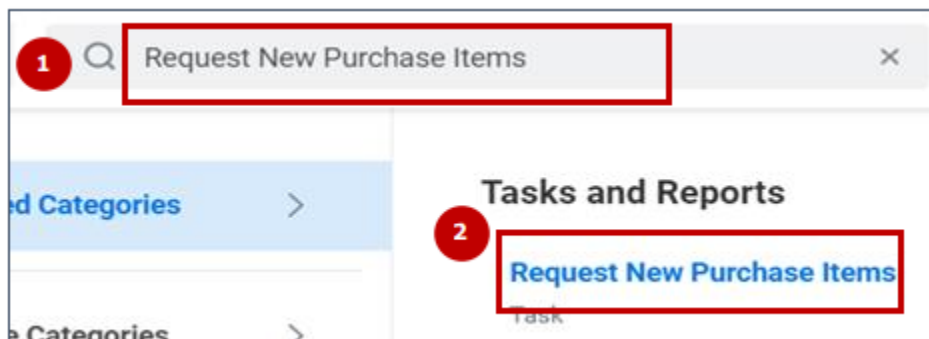
**Goods Lines**

2 Items

Item	Quantity	Unit Details	Extended Amount	Lot and Serial Number	Memo
KNEE ART SURF LT	1	Unit Of Measure: Each	2,142	Supplier: ZIMMER BIOMET	
		Unit Price: 2,142		Manufacturer: ZimmerBiomet	
				Lot Number: LOT444	
				Serial Number: SER444	
	1	Unit Of Measure:	50	Supplier:	

## Requesting a New Item to Be Built

1. To request a new medical item, begin by searching “Request New Purchase Items in the Workday Search Bar
2. Select the “Request New Purchase Items” Task.



3. Select the company for which you are requesting and clear out the Request Location field (it isn't required and sometimes creates errors). Choose 'New Purchase Item Request Bill Only' for the Purchase Item Request Type. The 'Pricing Effective Date' will be current date.
4. Click OK to access the questionnaire.

### Request New Purchase Items

↻
🔖
✕

**Requester** Hunter Chandler

**Company** ✕ 145 The Medical Center of Central Georgia, Inc (MCCG) ⋮

**Request Location** ⋮

**Purchase Item Request Type \*** ✕ New Purchase Item Request Bill Only 📄 ⋮

**Pricing Effective Date** 02/09/2026 📅

**Memo**

Cancel
OK

5. On the Questionnaire tab, simply enter your name, company, and an email address. Attach a scan of the bill only sheet here. This is required.

Questionnaire
Request Purchase Items

New Item Request Bill Only

Intended for use when a supplier representative delivers product(s) or services directly related to a specific patient case. A Bill Only PO provides an automated/expedited PO number in the ERP. These POs are already delivered and no shipment for goods are necessary.

Please complete the New Purchase Item Bill Only Questionnaire and Enter New Items to Request Tab as complete as possible. Reminder to make sure the correct company is selected when submitting your request.

If the supplier is not an AAH approved supplier, your request will not be completed and the supplier will need to register in Workday Strategic Sourcing

Please provide company or sales rep name and company information (phone number, email, website).

John Smith, Medtronic, johnsmith@medtronicusa.com

Please provide any additional information on your request (Bill Only Paperwork, FDA Approval) (Required)

DOC

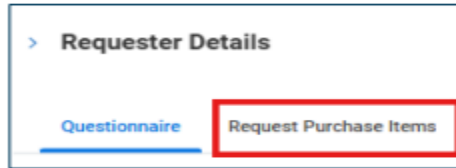
Bill Only Sheet Scan.docx

✓ Successfully Uploaded!

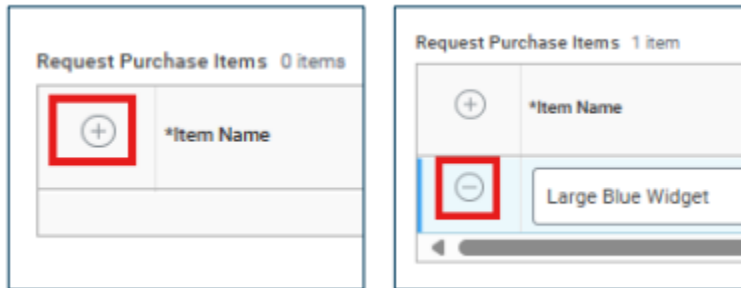
✕

Comment

6. Now click the Request Purchase Items tab to enter information about your items.



7. Click the '+' sign to add items. (You may click on the '-' sign to remove any errors)



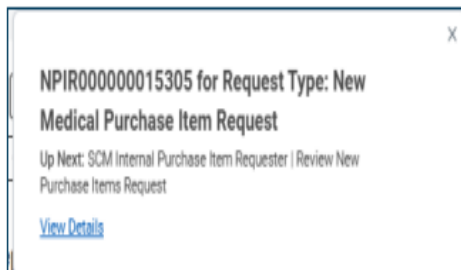
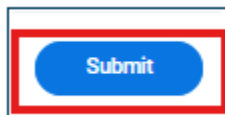
8. Required Fields and tips on each:
- Item Name** – Just give a reasonably strong description of the item
  - Item Description** – can be same as Item Name
  - Spend Category** – Choose Supplies: General – Medical (SC71741). **Tip: just search “supplies general” and hit enter - it will be the first selection.** The Advocate Health master data team will improve this later.
  - Manufacturer** – Search the manufacturer of the product. The Advocate Health master data team will fix anything wrong here; just get close.
  - Manufacturer Part ID** – Be as accurate as possible here.
  - Base UOM** – the lowest UOM in the packaging string (probably EA)
  - Default Ordering UOM** – the UOM that you sell the product to us in
  - Currency** – always USD
  - Default Ordering Price** – the price of the Default Ordering UOM
  - Preferred Supplier** – search for your supplier name and press enter
  - Preferred Supplier Item ID** – typically the same as the Manufacturer Part ID. This is the part number on the PO line.

Default Ordering Price	*Preferred Supplier	*Preferred Supplier Item ID	Preferred Supplier Contract
0			

Default Ordering Price	*Preferred Supplier	*Preferred Supplier Item ID	Preferred Supplier Contract
0	X OWENS & MINOR		

- **Tips:**
- An '\*' indicates a required field. Please note that some fields may only become fillable until a pre-requisite field is complete. (see below)
- You may need to scroll to the far right to view all fields

9. Click 'Submit' when complete



You will receive a pop-up message with your request ID. You may click 'view details' for additional information and status

## Pricing Discrepancies and How to Handle

When entering orders, the price in our Workday system will occasionally differ from the information that the representative has in their information. While pricing differences often have complex root causes, these are the general scenarios:

### 1. Supplier Rep's Price > Workday Price

- The best practice is to email [data.management.team@aah.org](mailto:data.management.team@aah.org).

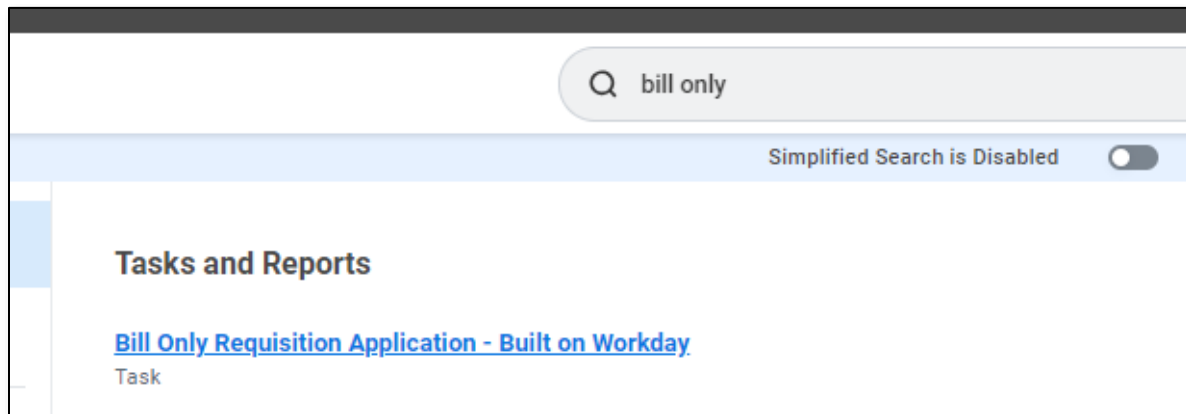
- Advocate’s pricing team will review your recommended price and update the price in the system, or they will inform you that the price in the system is accurate per contract.
- Once updated, the rep submits their request with no issues.
- If the rep submits the requisition without aligning on price before submission, Advocate Health’s normal pricing match exception processes will catch these. This potentially delays the most efficiency payment turnaround time.

**2. Supplier Rep’s Price < Workday Price**

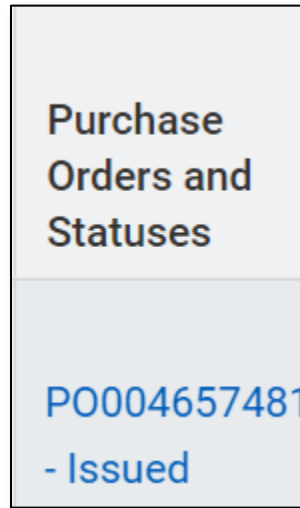
- The Advocate approver of your requests is empowered to reduce the price to the lower price stated on the scan of the sticker sheet/bill only sheet.
- These will not create match exceptions and will match and pay in a timely manner.
- Again, emailing [data.management.team@aah.org](mailto:data.management.team@aah.org) is the primary mechanism to get a price updated permanently in Advocate Health’s Workday item master.

### How Do I Print My PO?

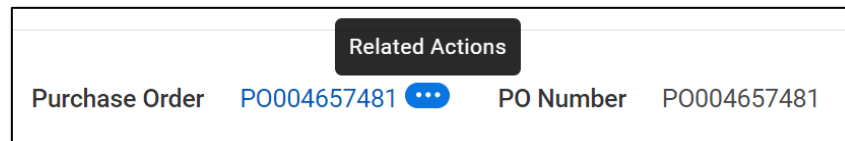
1. Log in and navigate to the Bill Only App.



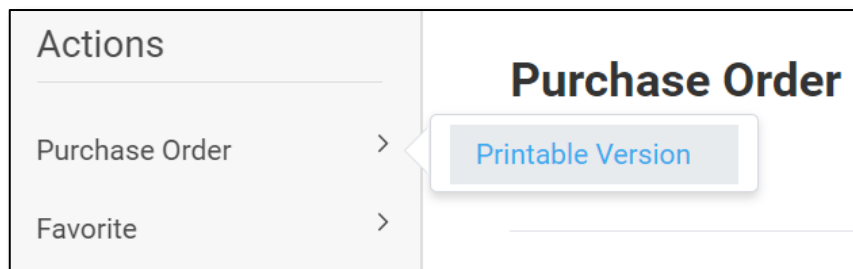
2. On your landing page, find the Requisition and Purchase Order you’d like to print. Click on the blue hyperlink to the issued Purchase Order.



3. At the top of the page, look for the blue Purchase Order number and find the Related Actions button (three dots in a “Twinkie” shaped button). Click Related Actions.



4. Select Purchase Order > Printable Version



5. Click OK
6. Wait a few seconds and click Refresh. When complete, you will see a blue link with a PDF file that you can now download and print.

## Common Support Needs – “How Do I Get Help?”

	Trouble finding an item. Question about an item. Question about price.	Need to request a new item.	Question About a Purchase Order.	Difficulties with Logins, App Access, Technical Issues.	Mismatch or Disagreement on Product Usage (Requisition does not match Epic documentation).
<b>Example(s)</b>	<ul style="list-style-type: none"> <li>• Pricing on Workday item doesn't match your expectation.</li> <li>• Item set up under the wrong supplier.</li> <li>• Part number, description</li> </ul>	<ul style="list-style-type: none"> <li>• Trying to add item to requisition and cannot find.</li> </ul>	<ul style="list-style-type: none"> <li>• Request to change something about a PO <u>after</u> there is an existing PO in Workday</li> </ul>	<ul style="list-style-type: none"> <li>• Cannot log in.</li> <li>• Unable to find Bill Only App once logged in.</li> </ul>	<ul style="list-style-type: none"> <li>• Disagreement on quantity used between in-room documentation and what representative enters.</li> </ul>
<b>Contact</b>	<a href="mailto:data.management.team@aah.org">data.management.team@aah.org</a>		<a href="mailto:ASC-Procurement-Resource@aah.org">ASC-Procurement-Resource@aah.org</a>	<a href="#">Open service now ticket using this link.</a>	Work directly with local site contact. Resolved between requisition Approver and supplier rep.
<b>Who Should Request Support?</b>	Advocate Health teammate (preferred) or Supplier Representative	Supplier Representative	Advocate Health teammate (preferred) or Supplier Representative	Advocate Health teammate (external reps don't have access)	Rep works with local site contact collaboratively.
<b>Important Information</b>	Manufacturer Part Number and Manufacturer. Details about what is wrong.	Refer to section in this document of how to request item.	PO Number. Question or request to change.	Name, Supplier, Issue at hand, Screenshots	Case Number, Requisition Number, Case Date, Item Information
<b>Next Steps</b>	You will receive a ticket from our Salesforce system.	You will be notified with the new item.	You will receive a ticket from our Salesforce system.	Teammate will track ticket status in Service Now and communicate back with rep when resolved.	Advocate teammate updates requisition or deny back to representative to start new requisition.

## Navicent/Sherman Cost Center Lookup


When entering your requisition, use the following Departments/Cost Centers depending on where your case was performed. **Navicent's Company is 145. Sherman's Company is 160.**

145-0145 37703	Navicent Operating Room
145-0145 36913	Navicent Electrophysiology (EP) Lab
145-0145 36903	Navicent Cath Lab/Hybrid OR
145-0145 37707	Navicent ASC
145-0145 36343	Navicent Interventional Radiology
145-0145 37751	Navicent Children's Operating Room

160-0160 37703	Advocate Sherman Hospital-Surgery Room
160-0160 36943	Advocate Sherman Hospital Interventional
160- 0160 37707	Advocate Sherman Hospital -Day Surgery Center

## Bill Only Order Supplier View

This report was created to allow each Supplier the opportunity to see all orders entered. Log into Workday and in the search field enter 700191.

 Search

Click on the report as shown below.

### Bill Only Orders Supplier View 700191

Report

[Report Definition](#)

This report is to be used by Supplier Representatives accessing our **Bill Only** Platform. Results will only return for those logged into Workday under a Supplier Contact account.

Company: Enter the applicable company

Request Date: Represent the date the requisition was created.

### Bill Only Orders Supplier View 700191 ✕

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**Bill Only Orders Supplier View 700191**

**Company** ✕ 145 The Medical Center of Central Georgia, Inc (MCCG) ⋮

**Request Date On or After** 02 / 16 / 2026 📅

**Request Date On or Before** 03 / 31 / 2026 📅

Cancel
OK

The table below will appear providing the information show plus more.

Bill Only Orders Supplier View 700191																				
Company: 145 The Medical Center of Central Georgia, Inc (MCCG) Request Date On or Before: 03/31/2026																				
Request Date On or After: 02/16/2026																				
This report is to be used by Supplier Representatives accessing our Bill Only Platform. Results will only return for those logged into Workday under a Supplier Contact account.																				
Requestion Line																				
User	Supplier	Requestion	Requested By	Submitted By	Request Date	Requestion Status	Procedure	Procedure Date	Procedure Number	Medical Record Number	Physician ID	Supplier	Item	Supplier Item Identifier	Unit of Measure	Quantity	Unit Cost	Extended Amount	Purchase Order Line	PO Star
No items available.																				