

Scan Operator Role (including HIPAA responsibilities)

Description Certain paper documents must be scanned and attached to SAP transactions to support Scan paper documents that support Finance and Materials Management processes. Sweep electronic files that support Finance and Materials Management processes. Initiate electronic workflows for certain Finance processes (e.g. accounts payable). Attach images to Finance and Materials Management SAP documents.

Tasks/Responsibilities

- Perform SAP operations to attach images to SAP documents.
- Perform SAP operations to initiate electronic workflows.
- Perform scanning operations in the OnBase imaging system.
- Receive and organize paper documents and electronic files related to FI and MM processes.
- Recognize and group paper and electronic files into appropriate document types.
- Recognize HIPAA-protected information and process images appropriately.

Related Processes

- Imaging - Payable: HIPAA Vendor Invoice Direct
- Imaging - Payable: HIPAA Vendor Invoice With PO
- Imaging - Journal Entry: Journal Entry Late
- Imaging - Journal Entry: Journal Entry Park
- Imaging - FM: Budget Supporting Documentation
- Imaging - FM: Funds Reservation
- Imaging - Payable: Employee Travel Claim
- Imaging - Payable: IDT Debit Memo
- Imaging - Payable: IDT Live or Non
- Imaging - Payable: Vendor Invoice Direct
- Imaging - Payable: Vendor Invoice Direct - Travel
- Imaging - Payable: Vendor Invoice With PO
- Imaging - Payable: Pay Credit Memo Direct
- Imaging - Payable: Pay Credit Memo with PO
- Imaging - Payable: PAY Employee Travel Advance
- Imaging - Payable: Listing Voucher
- Imaging - Purchase Order: Correspondence
- Imaging - Purchase Order: Goods Receipt
- Imaging - Purchase Order: Other
- Imaging - Receivable: Bank Deposit
- Imaging - Receivable: Wire Transfer
- Imaging - Grant: Grant Award Documentation
- Imaging - Grant: Grant Budget Documentation
- Imaging - Grant: Grant Proposal

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role may also be assigned the following roles:

- None

Knowledge/Skills/Abilities

- Knowledge of a computer and the ability to read and write English
- Knowledge of HIPAA-protected information that appears on agency documentation
- Knowledge of Onbase imaging procedures (included in pre-live training)
- Knowledge of relevant paper documents in finance and material management processes.
- Knowledge of SAP imaging transactions and SAP business workflow inbox (included in pre-live training)

Expected Training Courses

Total Training Hours: 2

Course Title: IMG100 SCEIS Document Imaging Duration in Hours: 2

HIPAA Protected Viewing Role

Description Viewing rights for non-HIPAA-protected images are given to SCEIS users with composite roles. HIPAA-protected image viewing rights are only given to SCEIS users whom the agency has authorized to view HIPAA-protected images.

Tasks/Responsibilities

- Execute SAP transactions that have images attached which contain HIPAA-protected information.

Related Processes

- Imaging - Payable: HIPAA Vendor Invoice Direct
- Imaging - Payable: HIPAA Vendor Invoice With PO

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role may also be assigned the following roles:

- None

Knowledge/Skills/Abilities

- Authorization by the agency to view HIPAA-protected information

Expected Training Courses

Total Training Hours: 2

Course Title: IMG100 SCEIS Document Imaging

Duration in Hours: 2

Imaging Workflow Recipient

Description When documents are scanned by a scan operator as “early imaging” the images are work-flowed to a recipient’s SAP Business Workplace inbox. The recipient is automatically determined by the system based on the document type and business area/cost center that the scan operator selects at the time the document is scanned. There may be one or more than one recipient.

The recipient will view the image and perform the appropriate SAP transaction (e.g. create invoice). When the SAP transaction is completed the SAP document is created and the image is attached to the SAP document as supporting documentation. If the SAP transaction has an approval process the approval workflow will proceed to the next recipient/approver (e.g. Accounts Payable approval workflow).

Clarification: The scan operator and imaging workflow recipient may be different people, or they may be the same person. If they are the same person, that person should have the appropriate Imaging Workflow Recipient role and the Scan Operator role.

The following document types are configured in SCEIS for “early imaging”; therefore, at least one recipient in an agency must be mapped to each role. There may be more than one recipient for each role.

Clarification: If the role Cost Center (xxxxxxxx) is defined just to the business area level for a role then all images of that document type scanned in the agency will go to the same recipient(s). If scanned images need to go to certain recipients for one cost center and different recipients for another cost center than the role Cost Center should be defined to the appropriate number of cost center digits for each recipient.

Imaging Workflow Recipient Role (Recipient performs this transaction type)	Associated Transaction Code
JE Journal Entry Documentation Park Recipient	FV50
PAY Employee Travel Claim Recipient	ZTRAVEL
PAY Employee Travel Advance Recipient	ZTRAVEL
PAY Vendor Invoice Direct – Travel Recipient	ZTRAVEL
PAY IDT Live or Non Recipient	ZIDT
PAY Vendor Invoice Direct Recipient	FV60
PAY Vendor Invoice Direct - HIPAA Recipient	FV60
PAY Vendor Invoice With PO Recipient	MIR7
PAY Vendor Invoice With PO – HIPAA Recipient	MIR7
PAY Credit Memo Direct Recipient	FV65
PAY Credit Memo With PO Recipient	MIR7
PO Goods Receipt Recipient	MIGO_GR
RCV Bank Deposit Recipient	F-04
RCV Wire Transfer Recipient	F-04
RCV IDT Billable	ZARIDT

Tasks/Responsibilities

- Monitor your SAP Business Workflow Inbox for incoming images
- Perform the appropriate SAP transaction for each imaging item received in your Inbox

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role may also be assigned the following roles:

- Those assigned Imaging Workflow Recipient roles must also be assigned the role(s) needed to perform the associated transaction code
- Those assigned HIPAA Recipient roles must also be assigned the “HIPAA Protected Viewing” role

Knowledge/Skills/Abilities

- Knowledge of a computer and the ability to read and write English
- Knowledge of appropriate SAP transactions and SAP business workflow inbox (included in pre-live training).

Expected Training Courses

Appropriate transaction code course and/or workflow course.