



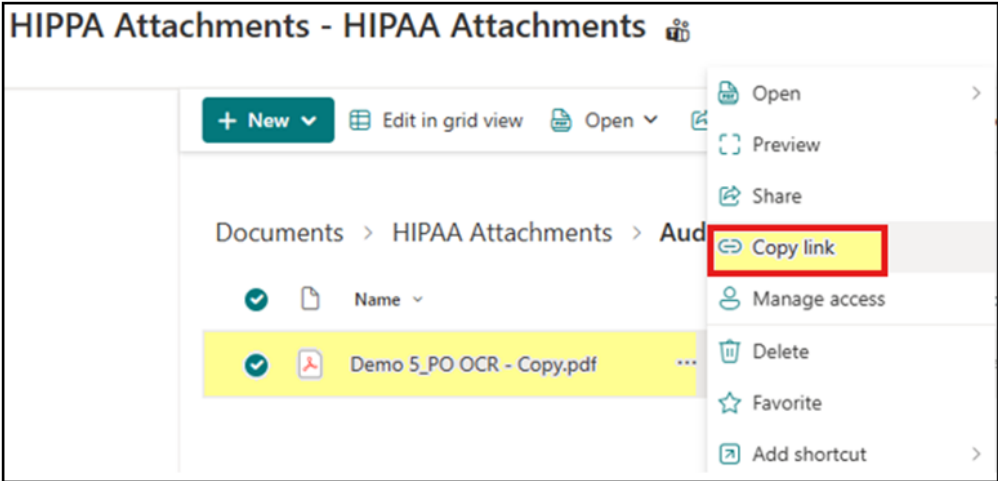
KERN COUNTY WORKDAY JOB AID

Uploading HIPAA-Sensitive Invoices



Audience / Role	Accounts Payable / Employees
Description	This Job Aid provides instructions when attaching invoice that contains HIPAA-protected information. This method keeps sensitive data out of Workday while still allowing AP and approvers to review the files securely.
Related Job Aid(s)	Create Supplier Invoice with OCR, Create Supplier Invoice – Non-OCR

****Do not upload HIPAA documents directly into Workday****

1	Upload your documents into your SharePoint folder: - Go to your department's designated SharePoint folder for HIPAA-sensitive documents. - Upload all invoice files directly to the SharePoint folder. - If you do not have access to the folder, please submit a Workday Help ticket to request access.
2	Copy a secure link to the document: - After your file uploads, hover over the document and click the three dots next to the file name. - From the list that appears, select Copy Link. 
3	Paste the link into a Word document: - Open a new blank Word document. - Paste the SharePoint link into the document. - Add any optional reference details (invoice number, supplier name, etc.).



Uploading HIPAA-Sensitive Invoices

	• Name the Word file carefully — do not include any HIPAA-sensitive information in the file name. • Save the Word file to your computer in the same location where you normally store invoices prior to uploading.
4	Upload into Workday: • Once the Word document (containing only the secure link) is saved, follow the standard OCR upload process to add it to Workday.

Things to Know

- The Word document stored in Workday contains only the link, not the HIPAA-sensitive files themselves.
- Only users who already have access to your department's SharePoint folder will be able to open the linked documents.
- This process keeps all HIPAA-sensitive content inside SharePoint, where access is controlled and monitored.

Related Reports

- Find Supplier Invoices report