

# **Knowledge Base Article**

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#### **Overview**

This Knowledge Base Article discusses the **Review Invoices** functionality, detailing the steps for the Title IV-E Agency to approve Invoice Line Items, and allow the associated payments to be created, rostered and disbursed.

#### Navigating to the Review Invoices Screen

From the SACWIS Home Page:

1. Click the Financial Tab.

Home		Intake		Case	PI	ovider	Financial		Administration
Workload Activ	n Items	Services	Eligibility	Payment	Benefits	Statistical & Ex	penditure Reports	Provid	er Invoicing

2. Click the **Provider Invoicing** tab.

Home		Intake		Case	Р	rovider	Financial		Administration
Workload	Action Items	Services	Eligibility	Payment	Benefits	Statistical & Ex	penditure Reports	Provide	er Invoicing

The left navigation pane appears.

3. Click **Review Invoices** in the navigation pane.

Home	Intake	Case	Provider	Financial	Administration
Workload Action Items	Services El	ligibility Payment	Benefits Statistical & E	xpenditure Reports Pro	ovider Invoicing
>					
vicing					
view Invoices					

The Review Invoices screen appears, displaying the Invoicing Agency dropdown.

- 4. Make a selection from the **Invoicing Agency** drop-down menu.
- 5. Click, Filter.

< >	
Invoicing	Review Invoices Filter Criteria
Review Invoices Search Invoices	Invoicing Agency:
	Filter



The **Review Invoices** screen appears, displaying the **Review Invoices List** grid (items that are awaiting review from the selected Invoicing Agency).

6. Select the **review** hyperlink next to the desired Invoice Line Item.

Invoicing Review Invoices Search Invoices	Review Invoicing	Invoices Filter ( g Agency:	Criteria	~					
[	Review	Invoices List							
		Invoice Number Invoice Date	Line Item Number	Provider Name / ID	Person Name / ID	Service Service Date	Cost Total	Prevention Amount	Status
	<u>review</u>	00000000 MM/DD/YYYY	0000000	<provider name=""> / 00000000</provider>	Lastname, Firstname / 00000000	<service> MM/DD/YYYY</service>	\$0.00	\$0.00	<status></status>
	<u>review</u>	00000000 MM/DD/YYYY	000000	<provider name=""> / 00000000</provider>	Lastname, Firstname / 00000000	<service> MM/DD/YYYY</service>	\$0.00	\$0.00	<status></status>
	review	00000000 MM/DD/YYYY	0000000	<provider name=""> / 00000000</provider>	Lastname, Firstname / 00000000	<service> MM/DD/YYYY</service>	\$0.00	\$0.00	<status></status>
	<u>review</u>	00000000 MM/DD/YYYY	0000000	<provider name=""> / 00000000</provider>	Lastname, Firstname / 00000000	<service> MM/DD/YYYY</service>	\$0.00	\$0.00	<status></status>
	review	00000000 MM/DD/YYYY	0000000	<provider name=""> / 00000000</provider>	Lastname, Firstname / 00000000	<service> MM/DD/YYYY</service>	\$0.00	\$0.00	<status></status>

The Review Line Item screen appears.

#### **Reviewing a Line Item**

1. The **Review Line Item** screen will display the specific **Service Details** for the Line Item as well as a payment breakdown for all the funding sources related to the payment that will be created. Please ensure the Service Details are accuate.

Review Line Item	
INVOICE NUMBER: 00000000	PROVIDER NAME / ID: ProviderName / 00000000
INVOICE LINE NUMBER: 00000000	PERSON NAME / ID: Lastname, Firstname / 00000000
Service Details	
Service Provider / ID·	Agency Name / ID:
<service name="" provider=""> / ID</service>	AgencyName / 00000000
Service:	Date of Service:
<service></service>	MM/DD/YYYY
Service: <service></service>	Date of Service: MM/DD/YYYY



Payment Breakdown				
Unit of Measure: 15 Minutes	Units: 3		Service Rate: \$0.00	
	Service Cost (Maintenance): \$0.00	Operating Cost (Administration): \$0.00	Cost Total: \$0.00	
Medicaid Covered Amount:	\$0.00	\$0.00	\$0.00	
Private Insurance Covered Amount:	\$0.00	\$0.00	\$0.00	
Other State Funding Covered Amount:	\$0.00	\$0.00	\$0.00	State Funding Source: <funding source=""></funding>
Other Federal Funding Covered Amount:	\$0.00	\$0.00	\$0.00	Federal Funding Source: <funding source=""></funding>
Other Funding Covered Amount:	\$0.00	\$0.00	\$0.00	Other Funding Source: <funding source=""></funding>
Prevention Services Line Item Amount:	\$0.00	\$0.00	\$0.00	

- 2. From the **Status** drop-down menu, select the desire status:
  - Approved: This status will approve the Line Item and allow the payment to be issued. Enter comments if desired.
  - Declined: This status will return the Invoice Line Item to the Invoicing Agency for corrections. For this status, comments will be required to detail why the line item is being declined. These comments will also be available to the Invoicing Agency.
  - Denied: This status will deny the Line Item and prevent any payments from being created and notify the Invoicing Agency that the Line Item has been denied. For this status, coments will be required to detail why the line item is being denied. These comments will also be available to the Invoicing Agency.

**Note:** Any comments that were previously entered, by either the Invoicing Agency or the Reviewing Agency, will display below the status drop-down menu in descending order.

3. Click **Save**. If the status is approved, payments will be created and issued the first of the following month to the invoicing agency.



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If you need additional information or assistance, please contact the SACWIS Help Desk at: 614-466-0978, select #3, then select #5.

