

Creating Invoices



Knowledge Base Article

Creating Invoices

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Creating Invoices

Overview

This knowledge base article discusses the **Provider Invoices** functionality detailing the steps to create and submit Invoices including linking a provider to the invoice and selecting service authorizations associated to the provided services. It will also discuss withdrawing invoices that have been submitted.

Navigating to the Provider Invoicing Screen

From the Ohio SACWIS Home Page:

1. Click the **Financial** Tab.



The sub-menu of tabs will change to financially related issues.

2. Click the **Invoicing** tab



The left navigation pane appears.

3. Click **Invoicing** in the navigation pane.



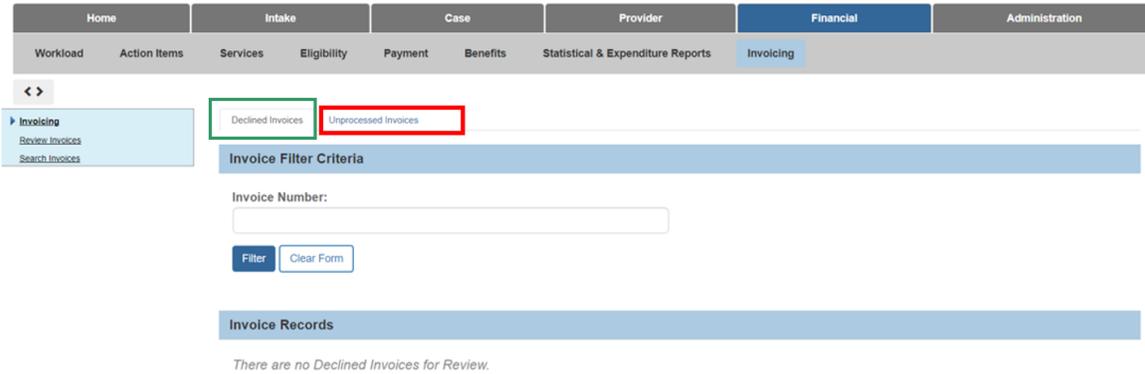
The **Declined Invoices** tab screen appears, displaying any Invoice Line Items that have a Status of Declined for Rework.

Understanding the Declined Invoices Screen

- Upon navigation to this screen, all Invoice Line Items that have a status of Declined for Rework will display, sorted by Invoice Date in ascending order.
- A search can be completed with the specific Invoice number to filter the results to that invoice.
- Select **edit** to be taken to the Line Item Details screen. Review the reason the Line Item was Declined for Rework and make any necessary adjustments/corrections.
- Select **Withdraw** to be taken to the Line Item Details screen to withdraw the Line Item.

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4. Click the **Unprocessed Invoices** tab.



Understanding the Unprocessed Invoices Screen

The **Unprocessed Invoices** tab screen appears.

- Upon navigation to this screen, all Invoice Line Items that have a Status of Unprocessed will display by Invoice Number in ascending order.
- A search can be completed with the specific Invoice Number to filter the results to that Invoice.
- Clicking Create Invoice will navigate the user to the Create Invoice Screen to create an Invoice.
- Clicking Process Line Items will navigate the user to the Process Line Items screen to submit Invoice Line Items for review/approval.
- Clicking edit next to the Invoice Number will navigate the user to the Create Invoice screen to modify the associated Invoice.
- Clicking edit next to the Line Item Number will navigate the user to the Line Item Details screen to modify the Line Item.
- Clicking the trashcan will delete the Line Item.

5. Click, **Create Invoice**.



The **Create Invoice** screen appears.

Creating Invoices

Creating an Invoice

- The user can start building an Invoice by entering the Invoice Number and Invoice Date, and then linking a Provider and Service Authorization(s).
- After linking a Provider and selecting Service Authorization(s), the screen will display each Service Authorization as a Line Item to be numbered. Service Authorizations can be selected multiple times to reflect the number of Service Dates for the Person and Provider.

1. Enter the **Invoice Number**.
2. Enter the **Invoice Date**.
3. Enter a **Provider Name**, or **Provider ID**.
4. Click, **Search Provider**.

The system will conduct a wildcard search to find all Providers based on the entered filter criteria.

The screenshot shows the 'Create Invoice' form. The 'Invoice Details' section includes 'Invoice Number' and 'Invoice Date' fields. The 'Service Provider Details' section includes 'Provider Name' and 'Provider ID' fields, with a 'Search Provider' button below.

The **Provider Search** screen appears, displaying the search results.

5. Click, **select** beside the relevant **Provider Name/ID**.

The screenshot shows the 'Provider Search' screen. It includes search criteria for 'Provider Name' (Buckeye) and 'Provider ID'. Below is a table of search results with a 'select' button next to 'The Buckeye Ranch'.

Provider Name / ID	Current Primary Address
select The Buckeye Ranch /	

The **Create Invoice** screen appears, displaying Provider information in the **Service Provider Details** grid.

6. Click, **Select Service Authorization**.

Creating Invoices

Note:

- Clicking **Save** will create the Invoice and return to the Unrprocessed Invoices screen.
- Clicking **Save and Add Another** will save the Invoice and create a new Invoice.

Create Invoice

Invoice Details

Invoice Number: *
xxxxxxxx

Invoice Date: *
06/30/2021 

Service Provider Details

Service Provider / ID:
The Buckeye Ranch / 

[Change Provider](#)

Service Authorization Details

No Service Authorizations have been selected.

[Select Service Authorization](#)

[Save](#) [Save & Add Another](#) [Cancel](#)

Creating Invoices

The **Select Service Authorization** screen appears.

Linking a Service Authorization

Upon navigation to the **Select Service Authorization** screen, the system will display all Service Authorizations associated to the selected Provider with Services that are able to be invoiced by the logged in user's agency.

1. Place a checkmark in the check box beside the relevant service authorization(s).
 - a. If you would like to select all Service Authorizations, select the checkbox in the column header.
2. Click, **Select**.

Select Service Authorization

Search Criteria

Currently displaying all non-end dated Service Authorizations. Enter filter criteria to find any closed Service Authorizations.

Name: OR Person ID:
First Name Last Name

Service Auth Begin Date:
Service Auth End Date:

Filter

Service Authorizations

<input checked="" type="checkbox"/>	Service Auth ID	Person Name / ID	Service Description / ID	Begin Date	End Date	Title IV-E Agency
<input type="checkbox"/>			Functional Family Therapy (FFT)	06/01/2021		County Job and Family Services
<input type="checkbox"/>			Functional Family Therapy (FFT)	05/01/2021		County Job and Family Services

Select Cancel

The **Create Invoice** screen appears, displaying the Service Authorization.

3. Enter a **Line Item Number**.
4. Click, **Save**.

Creating Invoices

Create Invoice

Invoice Details

Invoice Number: * Invoice Date: * 06/03/2021

Service Provider Details

Service Provider / ID:
Buckeye Ranch, Inc.

Service Authorization Details

Select Service Authorization

Service Authorization Details

Select Service Authorization

Service Authorization Details

Select Service Authorization

Service Auth ID	Person Name / ID	Service Description / ID	Begin Date	End Date	Title IV-E Agency	Line Item Number	
		Functional Family Therapy (FFT) /	06/01/2021		Job and Family Services	0000001	
		Functional Family Therapy (FFT) /	06/01/2021		Job and Family Services	0000002	

Save Save & Add Another Cancel

The **Unprocessed Invoices** tab screen appears.

5. Click the **Invoice Line Items** drawer to expand the screen and display existing Line Item information.
6. Once the drawer is expanded, select **edit** beside the relevant **Line Item Number**.

Invoicing
Search Invoices

Declined Invoices **Unprocessed Invoices**

Invoice Filter Criteria

Invoice Number:

Filter Clear Form

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Invoice Records						
Create Invoice		Process Line Items		Expand All		
Invoice Number	Invoice Date	Provider Name / ID				
edit Test COE2	06/03/2021	Buckeye Ranch, Inc.				
Invoice Line Items ^						
Line Item Number	Person Name / ID	Service Service Date	Cost Total	Prevention Amount		
edit 0000002		Functional Family Therapy (FFT)	\$0.00	\$0.00		
edit 0000001		Functional Family Therapy (FFT) 08/02/2021	\$0.00	\$0.00		
Totals			\$0.00	\$0.00		

The **Line Item Details** screen appears.

Completing the Line Items Details Screen

Important: When completing a Line Item Detail, the system will conduct a check to identify any duplicate Line Items based on the following being the same:

- Service Date
- Recipient ID
- Service ID

If a Line Item already exists in the system for the same Provider, Service Recipient, Service and Date of Service, the system will display the following warning message to let you know of a possible duplicate: **Please confirm the Line Item you are completing is not a duplicate prior to submitting to the IV-E Agency.**

1. Enter the **Date of Service**.
2. Enter the Units.
3. Click **Calculate**.

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Line Item Details

INVOICE NUMBER: 00000000

PROVIDER NAME / ID: ProviderName / 00000000

Line Item Details

Line Item Number: *

00000001

Service Recipient Details

Person Name / ID:

Lastname, Firstname / 00000000

Service Details

Service:

<Service>

Service Auth Dates:

MM/DD/YYYY - MM/DD/YYYY

Title IV-E Agency

AgencyName

Date of Service: *



When the Service is Multisystemic Therapy (MST) or Functional Family Therapy (FFT)

- If Service Covered by Medicaid is **Yes**, upon calculate, the system will set the Medicaid Covered Amount to equal the Cost Total.

2.5.1.1.1 If Service Covered By Medicaid is Yes Screen Prototype:

Payment Breakdown

Cost Total:	\$0.00
Medicaid Covered Amount:	\$0.00
Prevention Services Total Cost Amount:	\$0.00

- If Service Covered by Medicaid is **No**, the system will take the Total Cost Amount and subtract amounts covered by other funding sources to calculate the Prevention Services Total Cost Amount.

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2.5.1.1.2 If Service Covered By Medicaid is No:

Payment Breakdown	
Cost Total:	\$0.00
Service Cost (Maintenance):	\$0.00
Operating Cost (Administration):	\$0.00

Private Insurance Covered Amount:	\$	<input type="text"/>		
Other State Funding Covered Amount:	\$	<input type="text"/>	<input type="text"/>	<small>State Funding Source</small>
Other Federal Funding Covered Amount:	\$	<input type="text"/>	<input type="text"/>	<small>Federal Funding Source</small>
Other Funding Covered Amount:	\$	<input type="text"/>	<input type="text"/>	<small>Other Funding Source</small>

Calculate Prevention Services Cost

When the Service is Healthy Families America (HFA) or Parents as Teachers (PAT)

- Upon clicking Calculate, the system will take the Total Cost Amount and subtract amounts covered by other funding sources to calculate the Prevention Services Total Cost Amount.
- If Service covered by ODH is yes, Health Total Cost Amount will equal the Prevention Services Cost Amount minus the federal reimbursement (FMAP).

When the Service is Ohio START

- Upon clicking Calculate Prevention Services Cost, the system will look at the Eligibility Details to determine if the service will be covered by Ohio START or Prevention Services. If the youngest child within Eligibility Details is 6 or older or if the Medicaid Covered Amount is more than \$0, the START Total Cost Amount will equate the Cost Total minus any amounts entered for other funding sources.
- If the youngest child within Eligibility Details is younger than 6, or if the Medicaid Covered Amount is blank or \$0. The Prevention Services Total Cost Amount will equal the Cost Total minus any amounts entered for other funding sources.

1. Enter the **Line Item Number**.
2. Enter the **Date of Service**.
3. Click, **Save**.

Creating Invoices

Line Item Details

INVOICE NUMBER: PROVIDER NAME / ID: *Buckeye Ranch, Inc.*

Line Item Details

Line Item Number: *

Service Recipient Details

Person Name / ID:

Case ID:

Service Details (MST / FFT)

Service
Functional Family Therapy (FFT)

Service Auth Dates:
06/01/2021 -

Title IV-E Agency / ID:
 County Job and Family Services

Date of Service: *



Unit of Measure:
15 Minutes

Service Rate:
\$0.00

Units:

Service Covered by Medicaid?

Eligibility Details

Name / ID	Age as of Service Date	PS Eligible	Eligibility Dates
<input type="text"/>	10		

Payment Breakdown (MST & FFT - Medicaid No)

Cost Total: \$

Service Cost (Maintenance): \$

Operating cost (Administration): \$

Private Insurance Covered Amount:

\$

Other State Funding Covered Amount:

\$

State Funding Source

Other Federal Funding Covered Amount:

\$

Federal Funding Source

Other Funding Covered Amount:

\$

Other Funding Source

Creating Invoices

Calculate Prevention Services Cost

Prevention Services Total Cost Amount: \$
Service Cost (Maintenance): \$
Operating cost (Administration): \$

New Status:

Comments:

✓ ABC
2000

Current Status: Unprocessed
Date: 08/19/2021 12:55:09 pm
Comments:

Save Cancel

Creating Invoices

The **Unprocessed Invoices** tab screen appears.

4. Click, **Process Line Items**.

Your data has been saved

Declined Invoices Unprocessed Invoices

Invoice Filter Criteria

Invoice Number:

Filter Clear Form

Invoice Records

Create Invoice **Process Line Items** Expand All

	Invoice Number	Invoice Date	Provider Name / ID	
edit		06/03/2021	Buckeye Ranch, Inc.	
	Invoice Line Items ▾			
edit	Testing final	06/30/2021		
	Invoice Line Items ▾			
edit		07/02/2021	Applewood Centers - Lorain Office	
	Invoice Line Items ▾			

The **Process Line Items** screen appears.

Processing Line Items

Note: From this screen, the user can select all Line Items that are ready to be reviewed by the Title IV-E Agency. Upon clicking Save, the system will set the Status of the selected Line Items to **Submitted**.

5. Place a checkmark in the check box beside the relevant agency.
6. Click, **Save**.

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Process Line Items

Line Items

Sort by:

Invoice Number (Ascending) ▾

Filter

By selecting the Line Item(s) and clicking save, you are confirming the Line Item(s) are valid and ready for approval by the Title IV-E Agency.

	Invoice Number Invoice Date	Line Item Number	Title IV-E Agency	Provider Name / ID	Person Name / ID	Service Service Date	Cost Total	Prevention Amount
<input type="checkbox"/>	xxxxxxxx 06/30/2021	1	County Job and Family Services	Buckeye Ranch, Inc. / 24473		Functional Family Therapy (FFT)	\$0.00	\$0.00
<input type="checkbox"/>	12345 08/09/2021	2	County Job and Family Services	Buckeye Ranch, Inc. / 24473		Functional Family Therapy (FFT)	\$0.00	\$0.00
<input type="checkbox"/>	67890 07/02/2021	test2	County Job and Family Services	Applewood Centers - Lorain Office / 28070914		Multisystemic Therapy (MST)	\$0.00	\$0.00
<input type="checkbox"/>	xxxxxxxx 08/09/2021	0000001	County Job and Family Services	Buckeye Ranch, Inc. / 24473		Functional Family Therapy (FFT)	\$0.00	\$0.00

Save

Cancel

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).