

Reviewing Person Invoice Line Items



Knowledge Base Article

Reviewing Person Invoice Line Items

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Reviewing Person Invoice Line Items

Overview

This Knowledge Base Article discusses the **Review Invoices** functionality for Person Invoices, detailing the steps for the Agency to approve Invoice Line Items.

Navigating to the Review Invoices Screen

From the Ohio SACWIS Home Page:

1. Click the **Financial** Tab.



No Broadcast messages at this time.

2. Click the **Invoicing** tab.
3. Click the Review Invoices link on the side navigation menu.



The **Review Invoices** screen appears, displaying the **Review Invoices List** grid.

Note: The screen will default results to any Invoice Line Items that are awaiting approval for the Logged in Agency. The User can enter Search Criteria to filter down to a specific item.

4. Make a selection from the **Invoicing Agency** drop-down menu.
OR
5. Provide the **Invoice Number** or **Person ID**.
6. Click, **Filter**.

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Invoicing

- Review Invoices**
- Search Invoices

Review Invoices Filter Criteria

Invoice Number: Person ID:

Invoicing Agency:

Awaiting state approval

Filter

The **Review Invoices** screen appears, displaying the **Review Invoices List** grid.

7. Select the **Review** hyperlink next to the desired Invoice Line Item.

Invoicing

- Review Invoices**
- Search Invoices

Review Invoices Filter Criteria

Invoice Number: Person ID:

Invoicing Agency:

Awaiting state approval

Filter

Review Invoices List

	Invoice Number / Date	Line Item Number / ID	Provider Name / ID	Person Name / ID	Service Service Dates	Cost Total	Total Reimbursement	Status
review	202406000000121 06/01/2024	003 / 1		Test Person / 123456	RTC 06/01/2024 - 06/28/2024	\$90.00	\$0.00	Submitted
review	202405000000222 05/01/2024	002 / 10		Test Person / 123456	RTC 05/01/2024 - 05/31/2024	\$500.00	\$1,200.00	Submitted

The **Line Item Details** screen appears.

Reviewing a Line Item

1. The **Line Item Details** screen will display in **View Mode** to allow the reviewer the ability to see all the **Service Details** for the Line Item. Please ensure the **Service Details** are accurate.

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- If the reviewer wants to view, **Approved/Pending Costs, Custody Details, Eligibility/Reimbursability Details, Bridges Ongoing Eligibility and Housing/Dependent Records**, click the **Dropdown** button to expand each section.

Line Item Details

NAME / ID: Test_Person / 123456	Age 15, 08/24/2008
INVOICING AGENCY: <i>Bridges</i>	INVOICE ID: 1234
INVOICING FOR MONTH:	

Service Details

Service: RTC	Service Provider: * <input type="text" value="Internet"/>
Service Begin Date: * <input type="text" value="06/01/2024"/>	Service End Date: * <input type="text" value="06/28/2024"/>
Cost Total: * <input type="text" value="\$ 90"/>	Agency Paid Date: * <input type="text" value="06/27/2024"/>
Other funding used to pay for this service. <input type="text" value="\$"/>	Other Funding Source: <input type="text" value=""/>

Calculate

Approved/Pending Costs ^

Incomplete Line Items

Invoice Number	Line Item Number	Service
2024	001	Rent
2024	002	Utilities
2024	004	Internet
2024	005	Cell Phone
2024	006	Furniture
2024	007	Car payment
2024	008	Gas
2024	009	Auto Insurance
2024	010	Laundry
2024	011	Clothing

Line Item for June 2024

Invoice Number	Line Item Number	Service	Service Dates	Line Item Amount	Status
	003	Renters Insurance	06/01/2024 - 06/28/2024	\$90	Submitted STATE APPROVAL

Payment Breakdown

Month	Ceiling	Approved / Pending Costs	Other Funding	Federal Share	State Share	Total Reimbursement	Balance Remaining
06/2024	\$0.00	\$0.00	\$0.00	\$0.00	\$90.00	\$90.00	\$0.00

- [Custody Details](#) ▾
- [Eligibility / Reimbursability Details](#) ▾
- [Bridges Ongoing Eligibility](#) ▾
- [Housing / Dependent Records](#) ▾

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3. From the **Status** drop-down menu, select the desired status:

- **Approved:** This status will approve the Line Item and allow the payment to be issued. Enter comments if desired. If the Line Item requires State Approval, once approved by Bridges Fiscal Supervisor, the Line Item will be sent to the State for Approval.
- **Declined for Rework:** This status will return the Invoice Line Item for corrections. For this status, comments will be required to detail why the line item is being declined. The Invoice will now display on the Declined Invoices page.
- **Denied:** This status will deny the Line Item and prevent any payments from being created and notify the Worker that the Line Item has been denied. For this status, comments 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 will display below the Status History section in descending order.

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

Reimbursed Service Tier

No service tier exists

New Status:

Comments:

✓ ABC

2000

Status History

Current Status: Submitted Date: 06/24/2024 03:20:30 pm

Comments:

Status: Submitted Date: 06/24/2024 03:20:30 pm

Save Cancel

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