Storyboard

Relative Caregiver Invoicing

This Storyboard covers how Relative Caregiver Workers will invoice payments for youth receiving a stipend.

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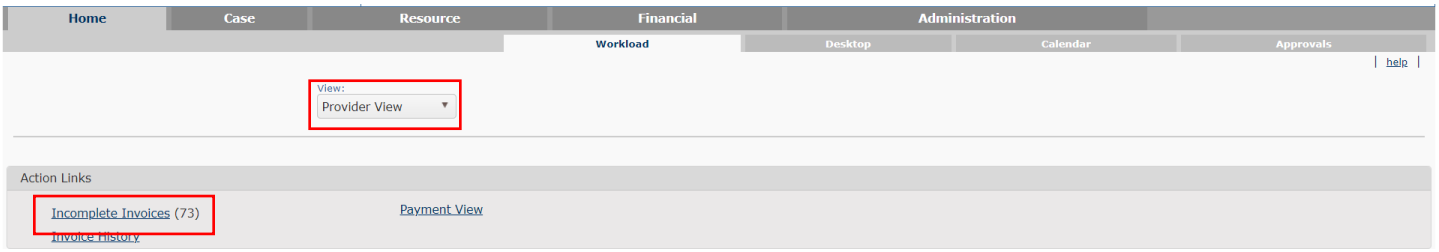
Relative Caregiver Invoicing

Step 1: Incomplete Invoices

Invoices are generated once a month for youth who were eligible for a Relative Caregiver Stipend during the previous month. These invoices will be available on the Incomplete Invoices list for Relative Caregiver Workers with this access in the early part of each month. Once available, the dates of service can be reviewed and confirmed by Relative Caregiver staff for payment.

1. From the **TFACTS Home** page, click the **View** dropdown
2. Click **Provider View**
3. Click **Incomplete Invoices**



The **Incomplete Invoice Search Criteria** displays

4. Click **Search Criteria** field to filter by **Description**, **Invoice Number**, **Period End Date**, **Person ID**, **Person Name** or **Region**
    a. Multiple options can be selected to narrow results
    b. To view only Relative Caregiver Stipend invoices, choose **Description** for **Search Criteria** and **Relative Caregiver Subsidy Regular Rate** in the **Description** dropdown

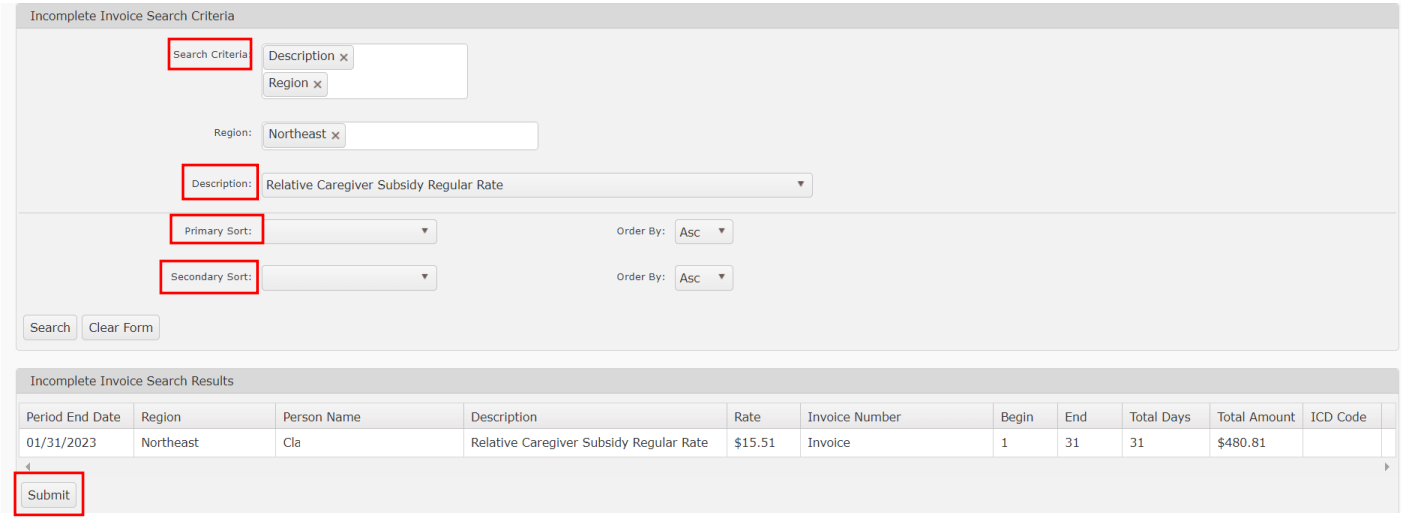
Note: If a selection is made using the **Search Criteria** field, this will open additional search fields; **Description, Invoice Number**, **Period End Date**, **Person ID**, **Person Name**, **Region** – If any of these are selected, there will be additional boxes that display to complete the search.

5. Click **Primary Sort** dropdown to sort by **Description**, **Period End Date**, **Person Name** or **Region** if applicable
6. Click **Secondary Sort** dropdown to add a secondary sort by **Description**, **Period End Date**, **Person Name** or **Region** if applicable
7. Click **Search** to display results or **Clear Form** to clear Search Criteria

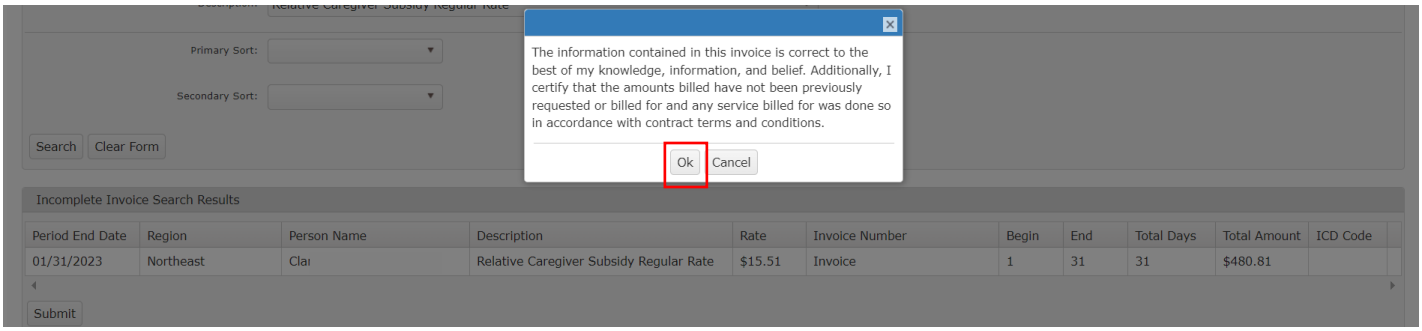
Incomplete Invoice Search Results displays the **Period End Date**, **Region**, **Person Name**, **Description, Rate,** and **Invoice Number**.

8. **Invoice Number** can be updated if needed by clicking within the **Invoice number** field
9. Enter the **Begin** and **End** date by clicking within the date field, then tab over for the **Total Days** and **Total Amount** calculate**.** (Example: 01/05/23-01/31/23 would be entered as Begin = 5, End Date = 31. If child is at eligible for the stipend from 01/01-01/31 the Begin = 1 and End = 31. The system will calculate the Total Days x the Rate = Total Amount.)
10. **ICD Code** is not required for Relative Caregiver Stipend Youth

11. Click **Submit**



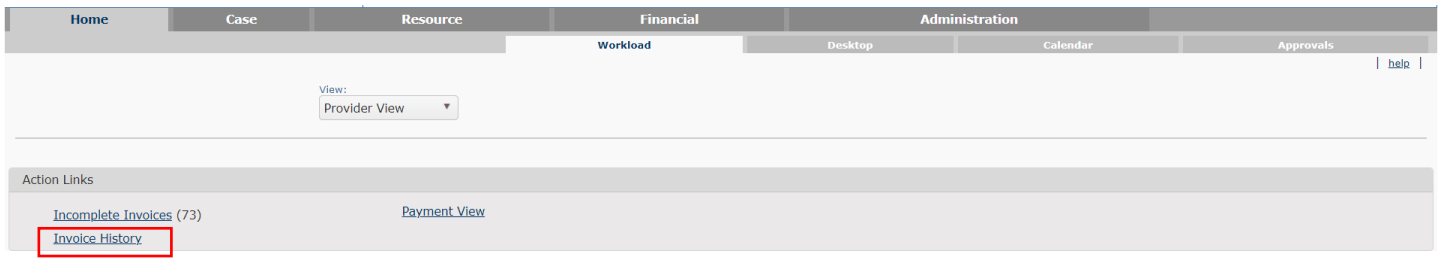
12. A pop-up message will display, click **OK** to submit the Invoice or **Cancel** to be returned to the Invoice screen



Note: After clicking **OK**, you will no longer see the invoices that were successfully submitted. If there are any discrepancies with the invoices, Validation Errors will display, and those errors will need to be corrected before the invoices are able to be submitted successfully.

Step 2: Invoice History

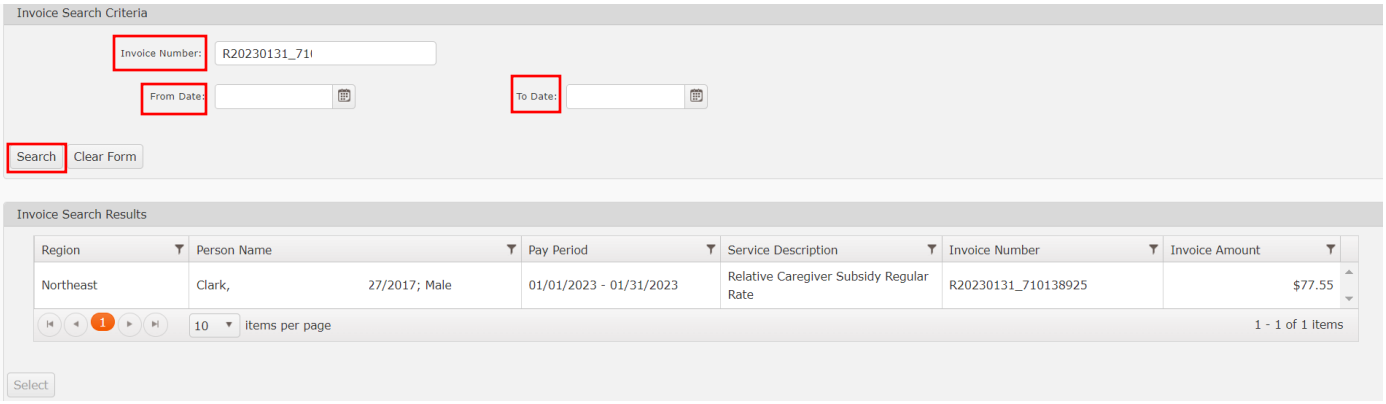
1. Click **Invoice History**



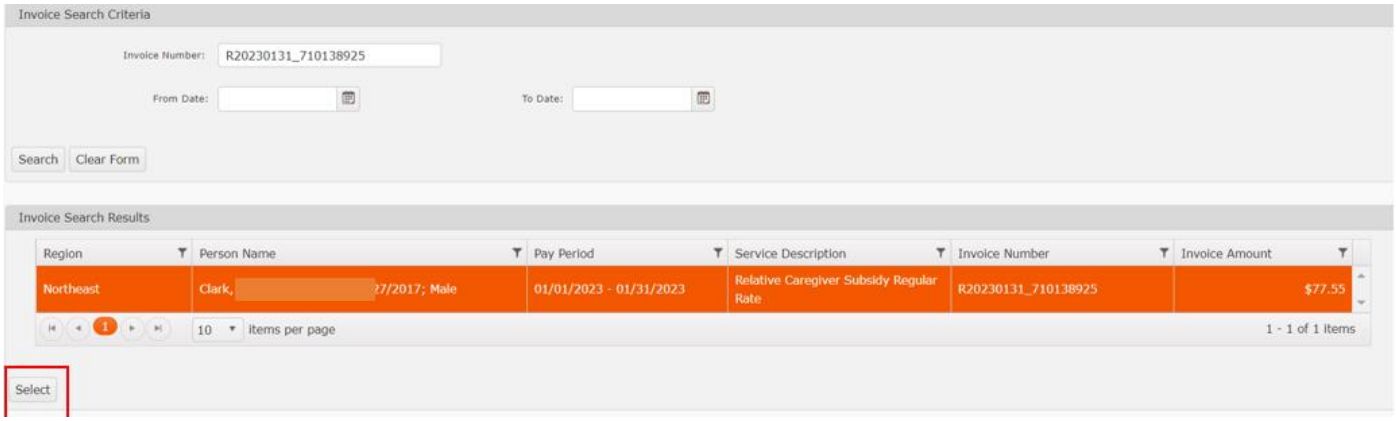
The **Invoice Search Criteria** displays and allows the user to filter by **Invoice Number, From Date, or To Date.**

2. Enter Search Criteria information

3. Click **Search** or **Clear Form**



4. Invoice Search Results display, Highlight the row and click **Select**

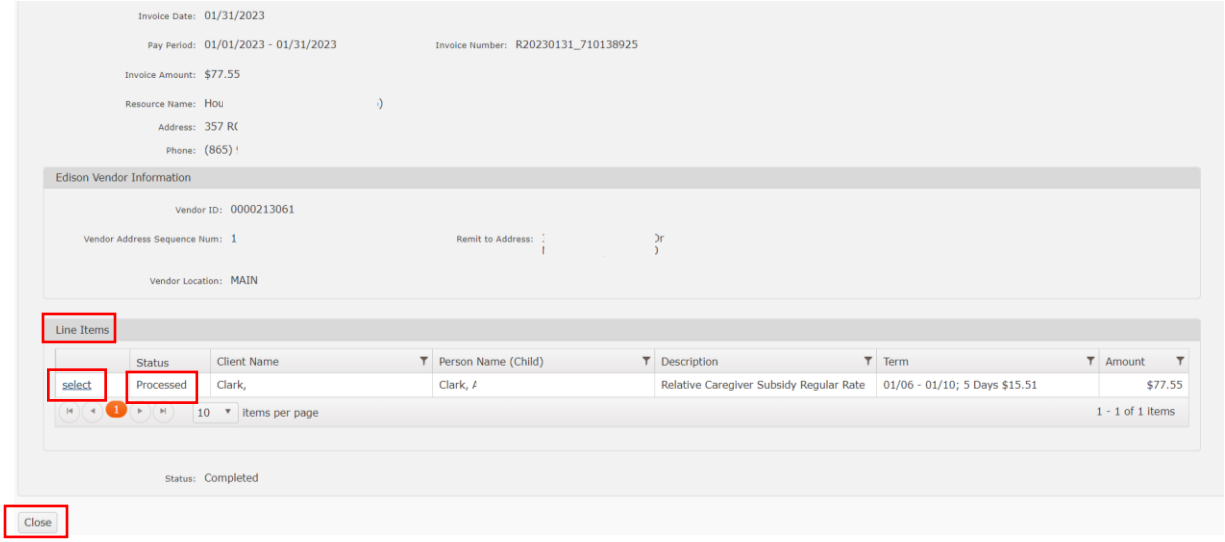


The Invoice Detail displays exactly what has been entered (Date, Invoice Number, Pay Period, Invoice Amount, Resource Name/Address and what amount to expect for payment).

Line Items display Status of Invoice, Client Name, Description (contract level), Term= Days @ Rate, Amount.

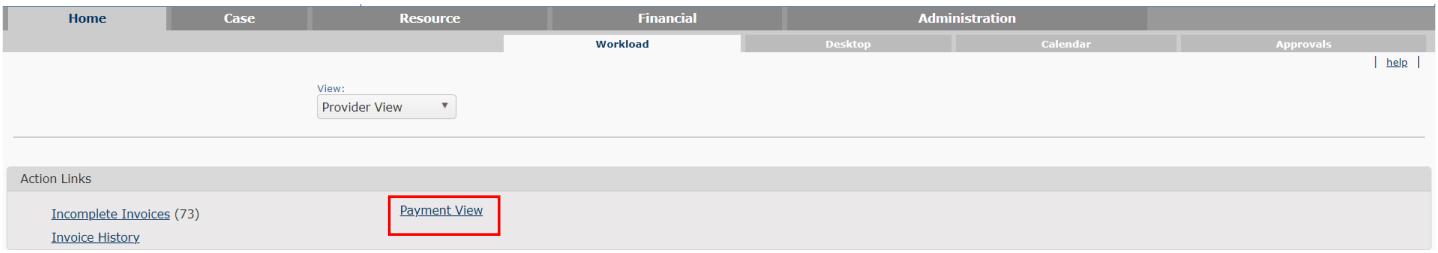
A Status of **Processed** shows the invoice has been submitted and is ready to be sent to Edison.

5. Click **select** to view the **Line Item** details of the Invoice
6. Click **Close** to return to prior screen



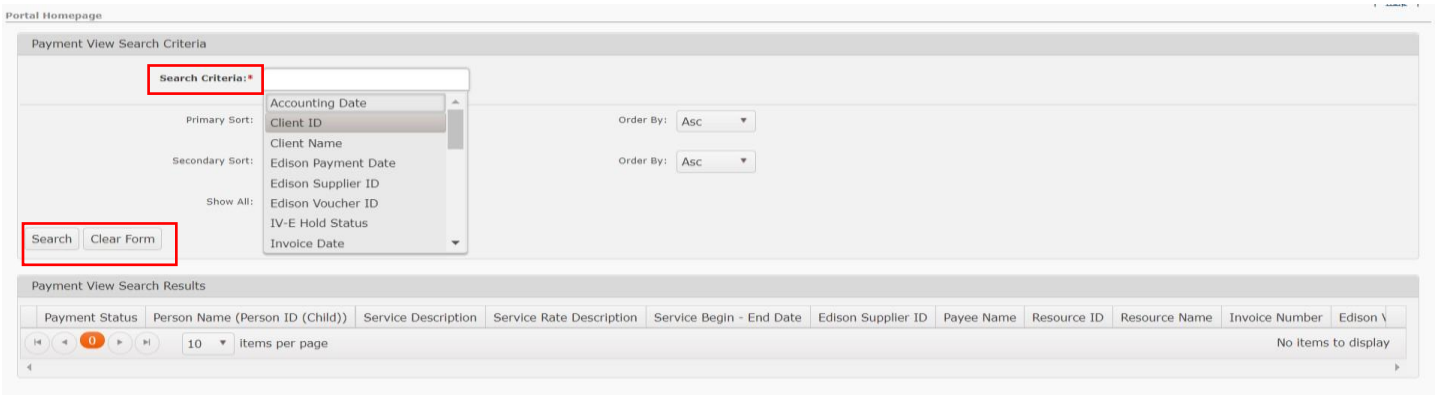
Step 3: Payment View

1. Click **Payment View** to check the Payment Status of an Invoice



Payment View Search Criteria displays

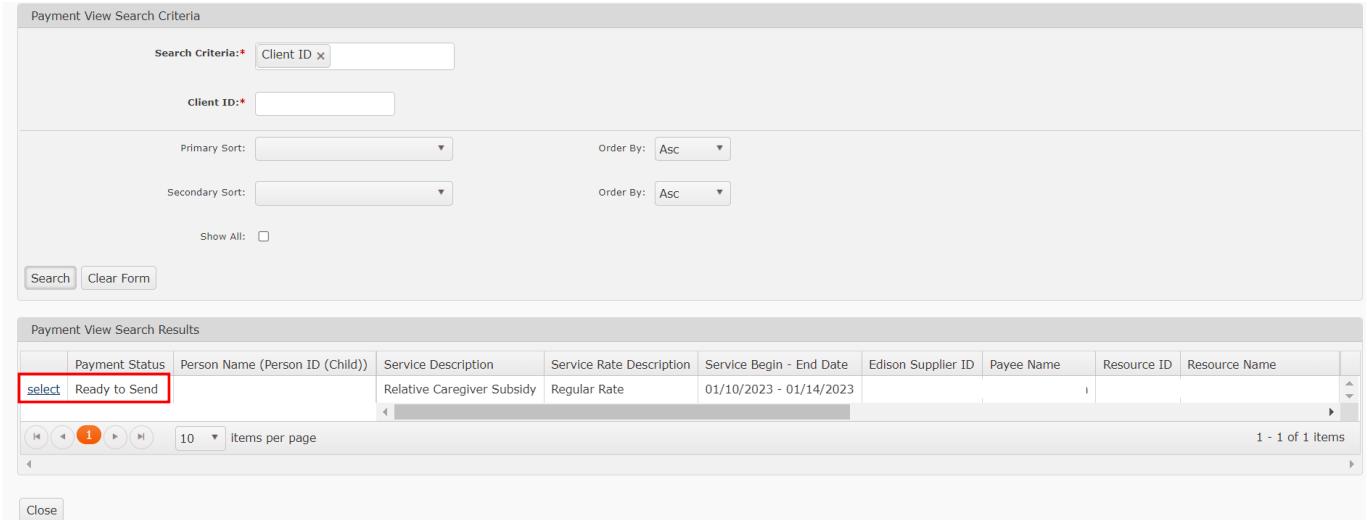
2. Select applicable criteria from **Search Criteria*** dropdown; depending on what criteria is being used, the system will prompt additional fields to perform the search.
3. Click **Search** or **Clear Form**



Payment View Search Results display.

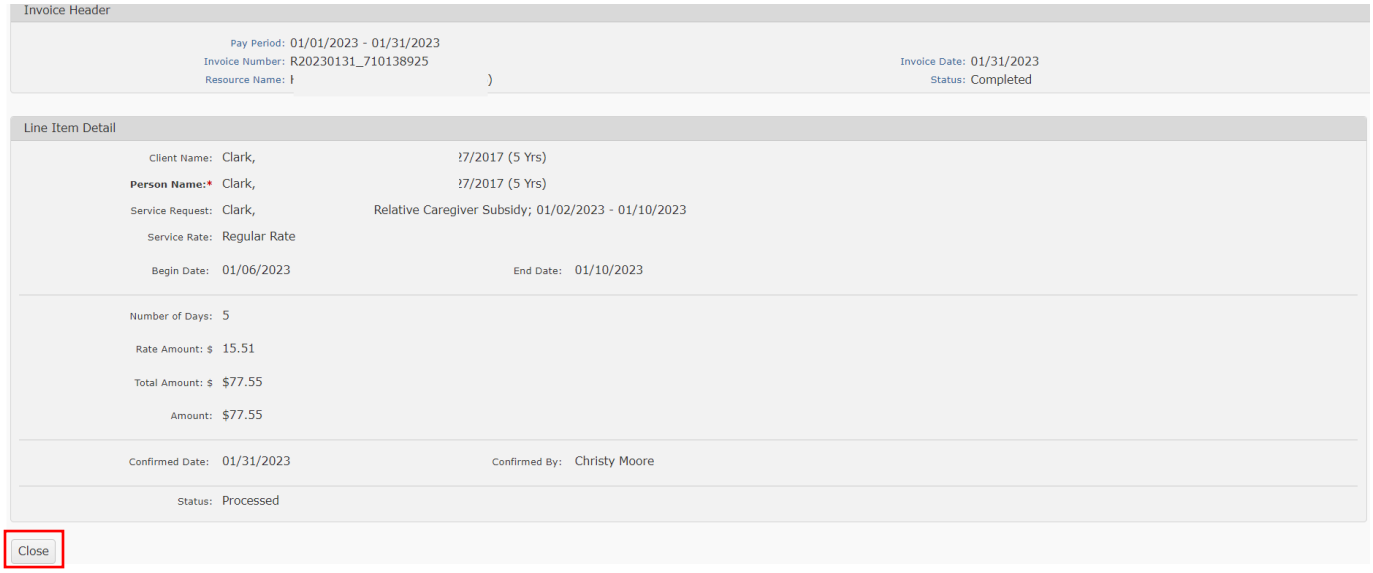
The **Payment Status** will display **Ready To Send** until it has been paid; once the Invoice has been paid, the Payment Status changes to Paid.

4. To view the payment information, click **select** next to the row that is to be reviewed.



The **Line Item Detail** displays.

5. Click **Close** to return to **Payment View**.



You have completed this storyboard.