



Storyboard

Provider Interface- Invoicing & Payments

This storyboard demonstrates how to invoice and review payments.

Table of Contents

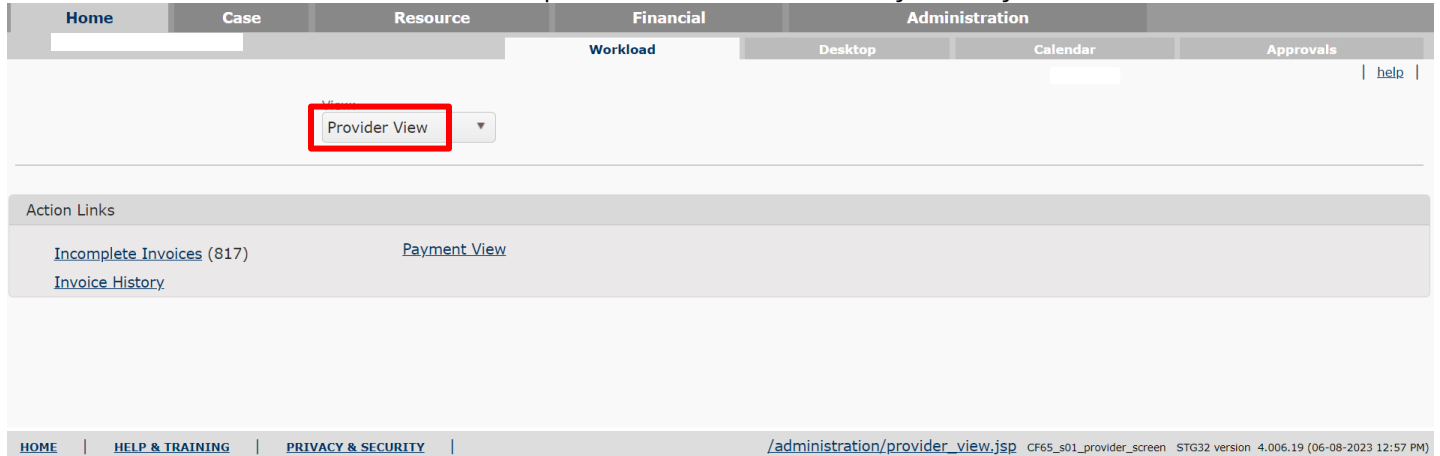
Reviewing the Provider Screen	2
Incomplete Invoices.....	2
Invoice History.....	4
Payment View.....	6

Provider Interface

Note: By default, the worker will initially land on the **Workload View** page and will need to click the **View** drop down list to select **Provider View** to perform the following tasks.

Step 1: Reviewing the Provider View Screen

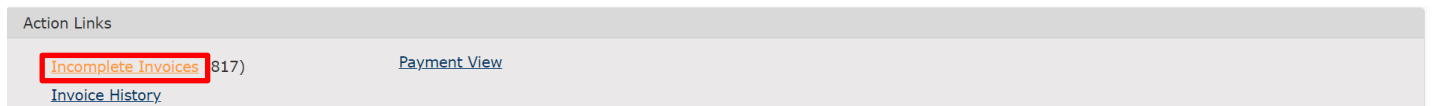
Private Providers will be able to view Incomplete Invoices, Invoice History and Payments.



Step 2: Incomplete Invoices

Invoices are generated once a month for DCS children who were placed in a provider setting during the previous month. These invoices are available under each provider's **Incomplete Invoices** in the early part of each month so that dates of service may be reviewed and confirmed by the provider staff for payment.

1. Click **Incomplete Invoices**



2. The **Incomplete Invoice Search Criteria** displays and allows the user to filter by **Search Criteria**, **Primary Sort**, or **Secondary Sort**, or the user can click **Search** to view all **Incomplete Invoices**.

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

Click **Search** to display results or **Clear Form** to clear Search Criteria

Home > Provider View

Incomplete Invoice Search Criteria

Search Criteria:

Primary Sort: Description

Secondary Sort: Invoice Number

Order By: Asc

Order By: Asc

Search Clear Form

Incomplete Invoice Search Results

(Note: Displayed DCS Begin and DCS End dates are generated based on the dates of service stored in TFACTS. Users can invoice for fewer days within the DCS Begin and DCS End date range.)

Period End Date	Region	Person Name	Description	Rate	Invoice Number	DCS Begin	DCS End	Begin	End	Total Days	Total Amount	ICD Code
Submit												

Apply Save Cancel

Incomplete Invoice Search Results displays the **Period End Date, Region, Person Name, Description, Rate, Invoice Number, DCS Begin, DCS End, Begin, End, Total Days, Total Amount, and ICD Code.**

4. Enter **Invoice Number** by clicking within the **Invoice number** field
5. (Note: Displayed DCS Begin and DCS End dates are generated based on the dates of service stored in TFACTS. Users can invoice for fewer days within the DCS Begin and DCS End date range.)
Enter the **Begin** and **End** date by clicking within the date field, then tab over for the **Total Days** and **Total Amount** calculate. (Example: 10/5/20-10/30/20 would be entered as Begin = 5, End Date =30. If child is at placement from 10/1-10/30 the Begin = 1 and End = 30. The system will calculate the Total Days x the Rate = Total Amount.)
6. Click the magnify icon to search for the **ICD code** if it did not auto-generate from the Monthly Summary.
7. Click **Submit**

Incomplete Invoice Search Results

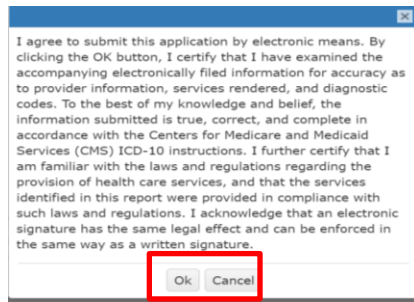
(Note: Displayed DCS Begin and DCS End dates are generated based on the dates of service stored in TFACTS. Users can invoice for fewer days within the DCS Begin and DCS End date range.)

Period End Date	Region	Person Name	Description	Rate	Invoice Number	DCS Begin	DCS End	Begin	End	Total Days	Total Amount	ICD Code
04/30/2022	Davidson	y (1023470)	Level 3 Continuum Special Needs Level 3 Continuum Special Needs	\$220.32		1	30					🔍

Submit

Apply Save Cancel

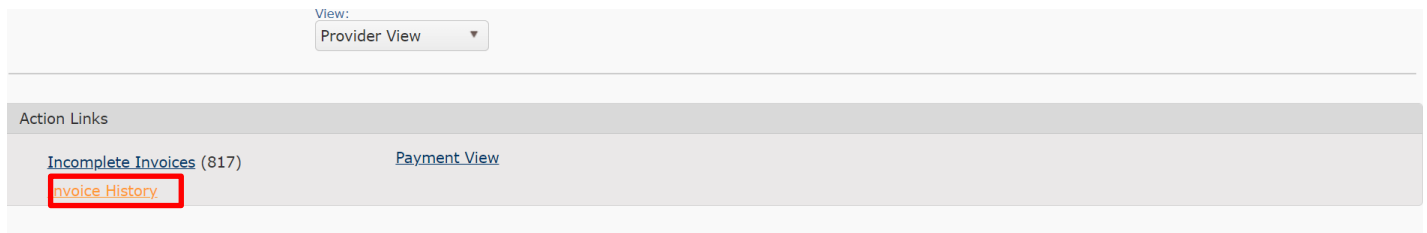
8. A pop-up message will display, click **OK** or **Cancel** to be returned to the Invoice screen



Note: After clicking **OK**, 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.

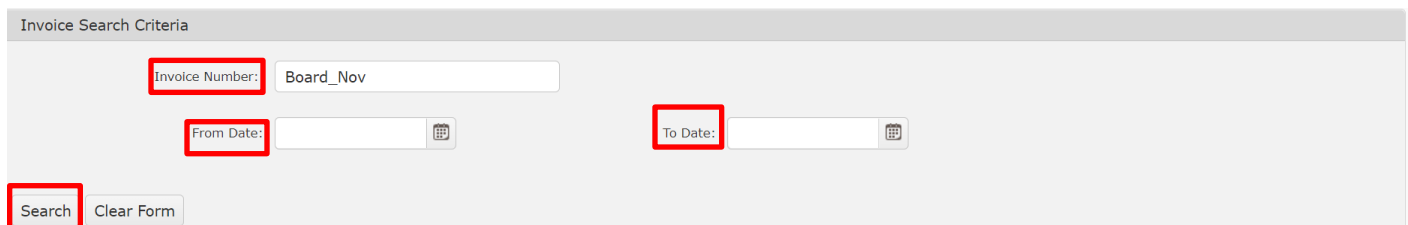
Step 3: Invoice History

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**

TFACTS Storyboard- Provider Interface- Change Passwords, Invoicing and Payments

Invoice Search Results

Region	Person Name	Pay Period	Service Description	Invoice Number	Invoice Amount
Northeast	Boa ; 02/27/	11/01/2020 - 11/30/2020	Level 2 Continuum Level 2 Continuum	Board_Nov	\$3,360.00

10 items per page 1 - 1 of 1 items

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.

- Click **select** to view the **Line Item Details** of the Invoice

Invoice Detail

Invoice Date: 10/06/2021
 Pay Period: 06/01/2021 - 06/30/2021
 Invoice Number: Cla
 Invoice Amount: \$3,600.00
 Invoice Billing Amount: \$3,600.00
 Resource Name: Holston United Methodist Home for Children
 Address: 404 HOLSTON Dr GREENEVILLE, TN 37743
 Phone: (423) 247-3007

Edison Vendor Information

Vendor ID: 0000090080
 Vendor Address Sequence Num: 1
 Vendor Location: MAIN

Line Items

Status	Name	Description	Term	Amount	Billable Amount
Processed	Clark, Jack Martin (115586951)	Level 2 Continuum Level 2 Continuum	06/01 - 06/30; 30 Days \$120.00	\$3,600.00	\$3,600.00

1 - 1 of 1 items

Status: Completed

Close

- Click **Close** to return to prior screen

Line Item Detail

Client Name: Bennett, Ky (6); DOB/Age: 01/02/2014 (7 Yrs)
 Service Request: Bennet (6); Level 3 Continuum Special Needs;
 12/01/
 Service Rate: Continuum: Level 3 Special Needs
 Begin Date: 12/01/2020
 End Date: 12/31/2020

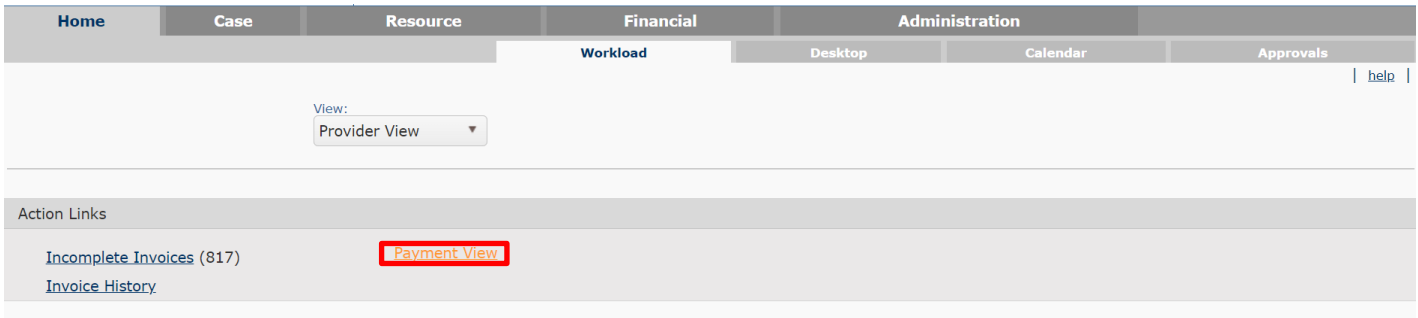
Number of Days: 31
 Rate Amount: \$ 216.00
 Total Amount: \$ \$6,696.00
 Amount: \$6,696.00

Confirmed Date: 02/26/2021
 Confirmed By: Chad Shaw
 ICD Code: Z6221
 Status: Processed

Close

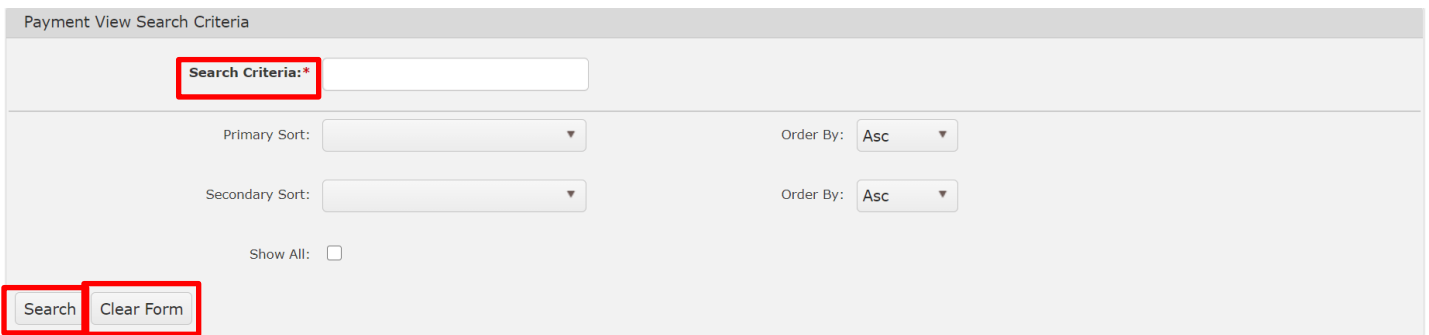
Step 4: Payment View

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

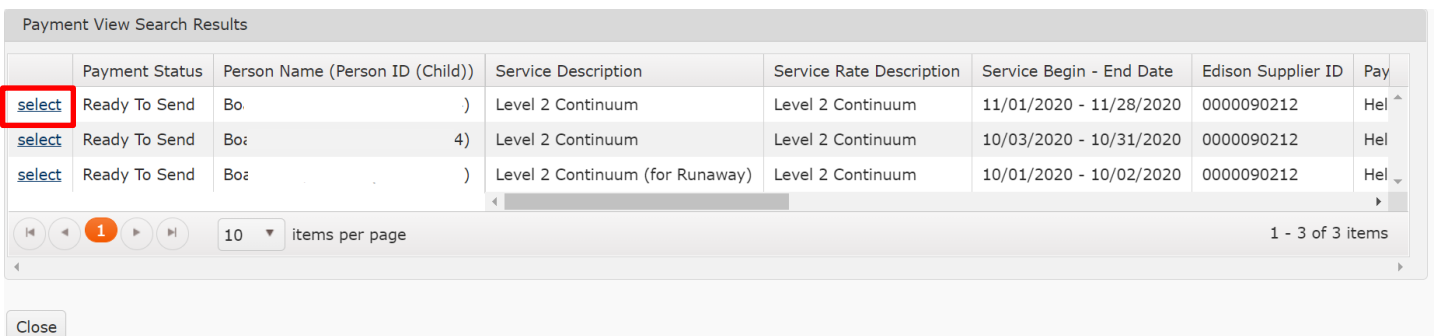


Payment View Search Criteria displays

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**



4. **Payment View Search Results** display. To view the payment information, click **select** next to the row that is to be reviewed.
5. 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'**.



You have completed this storyboard.