



Invoicing Basics

Provider Information



- Dashboard
- Business Profile
- Service Offerings
- Service Providers
- Billing**
- Help

Provider Billing Option

Service Orders Service Invoicing Reporting

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Service Orders

The line items listed below are services that have been requested. The guardian should contact you to schedule the service. Once the service has been rendered, please complete all the required fields and click the "Check Mark" at the right. If you are not able to render the service, then click the red X to remove this service from the list. After completing a line item, go to the service invoicing tab to approve the line item for payment.

SCHOOL YEAR: 2022-2023 **SEARCH**

PO #	BUSINESS INVOICE #	PURCHASE DATE	SERVICE TYPE	STUDENT NAME
20000261-1		10/23/2022	Math	Test Student
20000261-2		10/23/2022	Math	Test Student
20000261-3		10/23/2022	Math	Test Student
20000261-4		10/23/2022	Math	Test Student
20000261-5		10/23/2022	Math	Test Student
20000261-6		10/23/2022	Math	Test Student
20000323-1		02/01/2023	Math	Test One
20000331-1		02/01/2023	Math	prod support

From 1 to 10 of 16 10

1. Service Orders:
 - From this page providers can view any orders parents have submitted to them.
2. Service Invoicing:
 - On the service invoicing page, providers can complete the Invoicing process by billing the parent's account.
3. Reporting:
 - The Reporting page gives you access to all transaction history.

Service Orders

This page gives the provider access to the orders parents have placed with their business. Once the provider has communicated with the parent and confirmed the service, they can select the edit option to start the invoicing process.

END DATE	AMOUNT		
	\$1.00		

SCHOOL YEAR 2022-2023

PO #	BUSINESS INVOICE #	PURCHASE DATE	SERVICE TYPE	STUDENT NAME
20000261-1	<input type="text"/>	10/23/2022	Math	Test Student

SCHOOL YEAR 2022-2023

INDIVIDUAL PROVIDER	START DATE	END DATE	AMOUNT		
<input type="text" value="Select"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	\$1.00		  

1. Providers will need to enter a Business Invoice # before they continue. The invoice number can be assigned by the provider, for example using the invoice # in their POS system, etc.
2. Once the Invoice # is entered, the provider can now select the individual who provided the service under the Individual Provider field.
 - Please note, if the individual provider selected does not match the service in the order the system will not allow it to go through.
3. Now the provider may enter the start and end date as well as confirm the amount for the service.
 - If needed, the provider may adjust the amount. Please note the provider will not be allowed to enter an amount that is higher than the original request.
4. The last step is to click the green check mark once the information is entered and confirmed.

Dates of Service

SCHOOL YEAR 2022-2023

INDIVIDUAL PROVIDER	START DATE	END DATE	AMOUNT		
Select <input type="button" value="v"/>	mm/dd/yyyy <input type="button" value="calendar"/>	mm/dd/yyyy <input type="button" value="calendar"/>	\$1.00 <input type="button" value="up"/> <input type="button" value="down"/>	<input type="button" value="check"/>	<input type="button" value="close"/>

When entering dates of service, please remember we are unable to pay for services that have not been rendered; therefore, the start and end date cannot be dated in the future.

Possible Errors

Individual Provider Selected has an Expired License;

In order to fix this issue, please have the provider update their expired license number. If the providers information has been updated and the system still displays this message, please reach out to our service center.

Individual Provider selected does not offer service in this category

In order to fix this, please have the business confirm the category they have selected, and the type of services rendered by the provider. Ensure these two items match. If they do not, it may require the individual provider to update their services or the business to select another service provider, one who provides services in this category/type.

Service Orders **Service Invoicing** Reporting

Service Invoicing

Please review the line items below for accuracy. If the information is not correct, please click the red X to the right of the line item back to the "Service Orders." tab for corrections. You may select one line at a time or select all in the header row, then click the "Invoice" button to process the lines selected for payment.

SCHOOL YEAR: 2022-2023 **SEARCH**

PO#	BUSINESS INVOICE #	PURCHASE DATE	SERVICE TYPE	STUDENT NAME	INDIVIDUAL PROVIDER	START DATE	END DATE	AMOUNT	
<input type="checkbox"/> 20000261-1		10/23/2022	Math	Test Student		08/22/2022	10/22/2022	\$1.00	

INVOICE

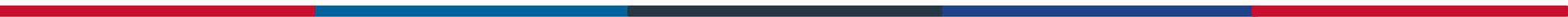
Service Invoicing

START DATE	END DATE	AMOUNT	
08/22/2022	10/22/2022	\$1.00	

INVOICE

Now that the provider has saved the service order and entered the appropriate information, the order will appear under Service Invoicing. Here the provider will have one last chance to review the information before invoicing the parent's account. Orders should remain here until the services have been rendered.

If the information is correct, the provider may select the line item and click the Invoice button.



Slide 6

BS0 The directions say "simply click on the red X", we need a full screen shot showing the red x.

Beatriz Sarmiento, 2023-02-28T17:37:57.418

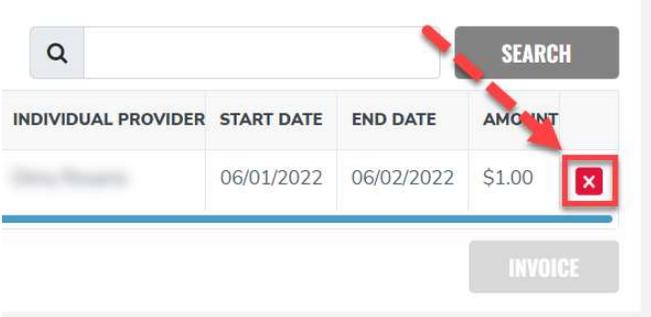
BC0 0 The screen in EMA won't allow me to get both the box and the red X so I grab a separate screenshot and added a note.

Bryant Cabrera, 2023-02-28T20:39:36.994

Updates

If changes need to be made to the information previously entered, the provider can simply click on the red X. This will remove the item and place it back on the Service Orders tab.

Once you select the item, you can scroll to the right to see the Red X.



INDIVIDUAL PROVIDER	START DATE	END DATE	AMOUNT	
	06/01/2022	06/02/2022	\$1.00	X

SEARCH

INVOICE

Last Step

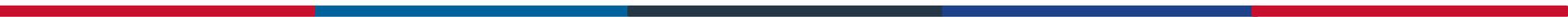


Are you sure you want to submit these invoices?

After submitting your invoices for payment, please use the reporting tab for payment status.

PO #	BUSINESS INVOICE #	STUDENT NAME	INDIVIDUAL PROVIDER	Amount
20000261-1				\$1.00

Once you click the Invoice button, a confirmation window will appear. Please review the information for accuracy and answer accordingly.



Reporting Statuses

View of the Reporting page with a line item

SCHOOL YEAR 2022-2023

PO #	BUSINESS INVOICE #	PURCHASE DATE	SERVICE TYPE	STUDENT NAME	INDIVIDUAL PF
20000261-1		08/22/2022	Math		

Line continued...

SCHOOL YEAR 2022-2023

STUDENT NAME	INDIVIDUAL PROVIDER	START DATE	END DATE	AMOUNT	STATUS
Test Student		08/22/2022	10/22/2022	\$1.00	Approved

Please note: In order to view the status of the line item, you must scroll to the right.

- ❖ **Reporting Statuses:**
- ❖ **In Process** – Invoice is pending submission by the provider.
- ❖ **Approved:** Invoice has been submitted and is awaiting payment processing.
- ❖ **Paid:** Payment has been received by the provider.
- ❖ **Receivable:** When an overpayment has been made.

Take Note!

1. The system currently requires the provider to select an “individual provider” for every service order.
2. If the provider does not save their banking information, they will not have access to the Billing option. This means the billing option will not appear until the provider has completed their banking information.

