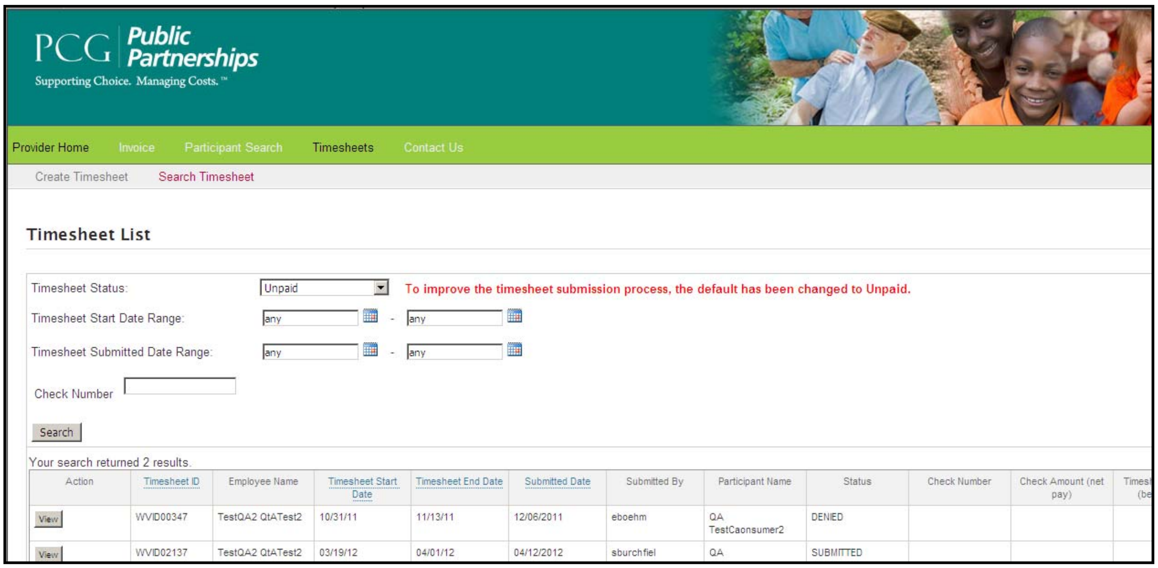
How to Create and Submit a Travel Invoice:

1. Log in to the PPL Web Portal using your pre-assigned username and password

   https://fms.publicpartnerships.com/PPLPortal/login.aspx

2. You will default on the **“Timesheets – Search Timesheet”** page.



3. In the header bar at the top of the page you will see the navigation options for employees:

4. Select the option for **“Invoice”** by clicking on the words. The screen will default to **“Create Invoice”** and you will see the **“Submit Invoice”** page below:

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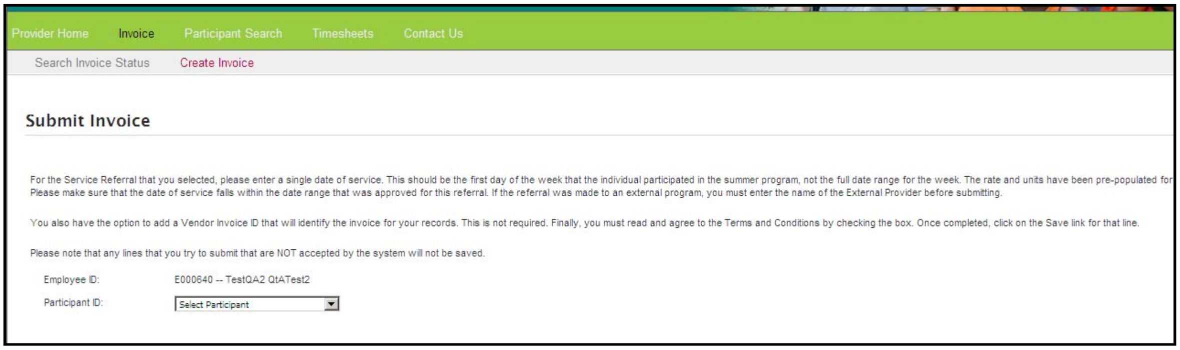
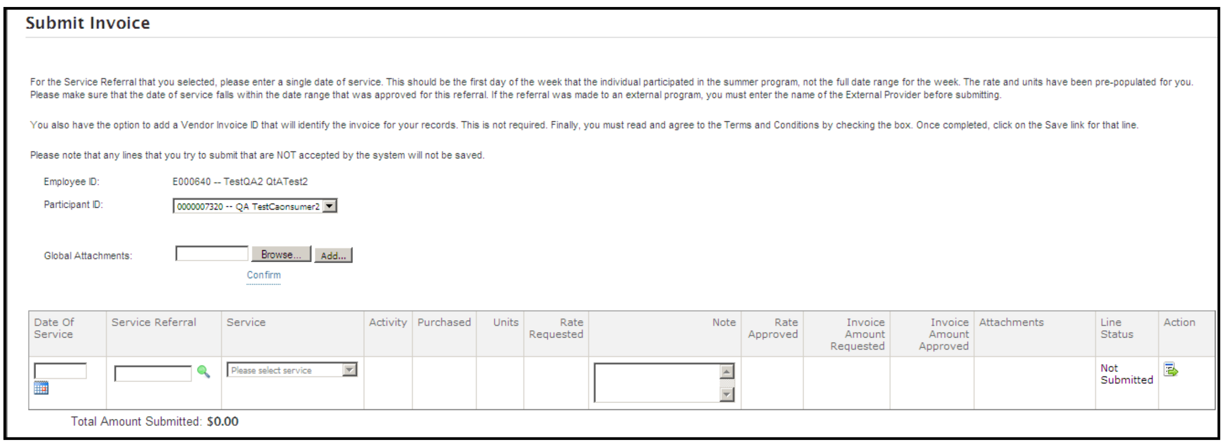


5. If you work for multiple participants, choose from the drop down list the participant ID for which you want to submit a Travel Invoice. Once a participant has been selected, the following page will be displayed:



6. You may type the **"Date of Service"** (i.e. 4/23/2012) or you may choose the date of service by clicking on the calendar and selecting the date on which you provided Transportation services.

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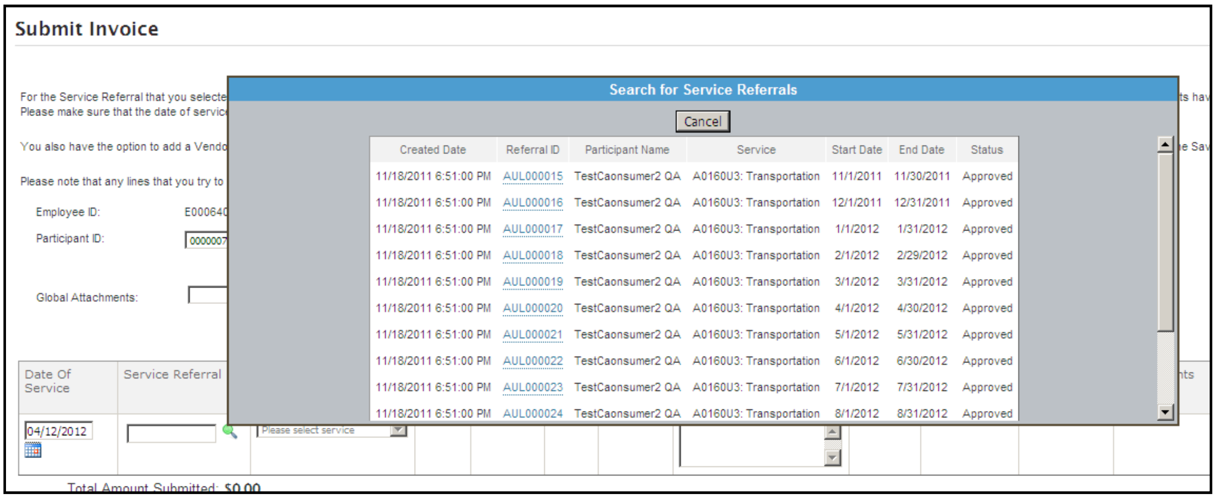
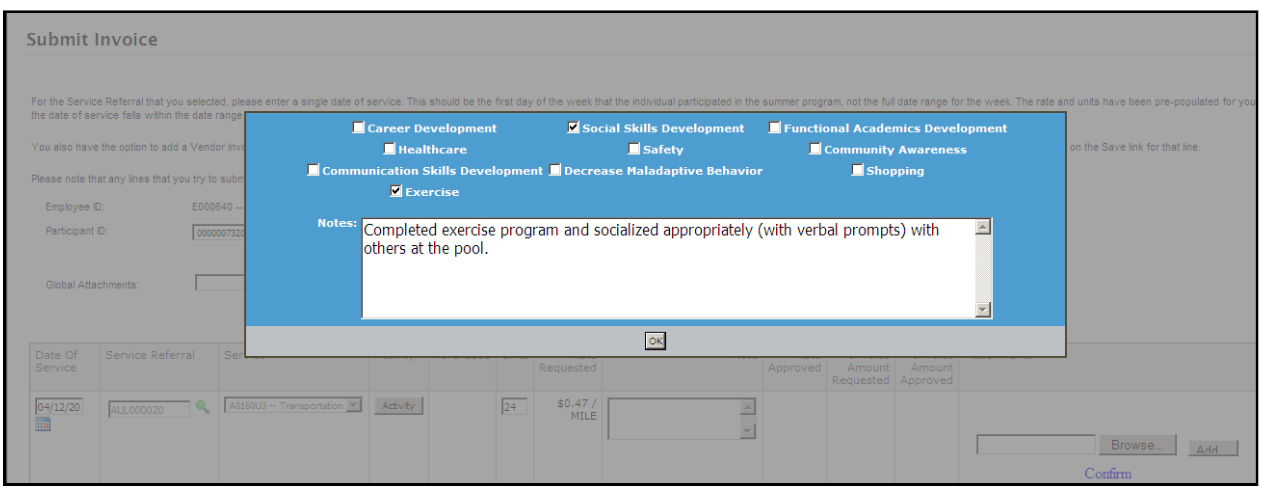
7. Next you must select the **"Service Referral"** that relates to the mileage that you wish to submit for reimbursement. By clicking on the magnifying glass beside the Service Referral box, you can view a list of all Transportation Service Referrals. Choose the one with start and end dates that correspond to the date you provided transportation services.



8. By clicking on the **"Activity"** box, the following screen will be displayed. You may choose the activity(s) that best describes the purpose of the travel. In the notes section of this page you may type details regarding the activity.



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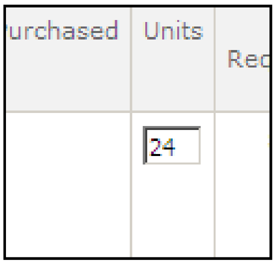
9. Enter the total number of miles traveled in the "Units" box. You cannot enter fractions or decimal figures. Instead you may round up or down to the nearest whole mile. (Round down for less than half a mile. Round up for a half mile or more.)



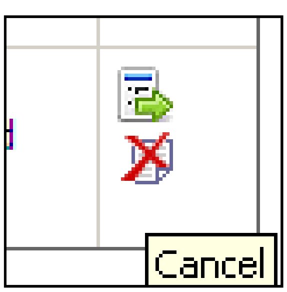
10. The **"Rate Requested"** will display the reimbursement rate per mile that was agreed upon by you and the participant/Program Representative at the time you were hired.

11. In the **"Note"** section you MUST enter the starting point and destination for the activity. You may designate a round trip using the abbreviation "RT".

    Example: *Traveled from the participant's home to the YMCA, Hillcrest Drive, Charleston, WV. RT*

12. It is not necessary to submit attachments for Transportation Invoices.

13. While entering data you may remove the entire line by clicking the **"Cancel"** icon (red X) under the **"Action"** column at the far right side of the page.



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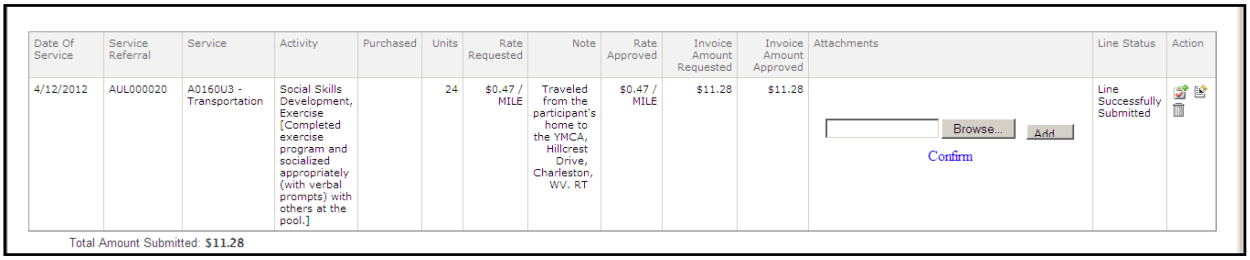
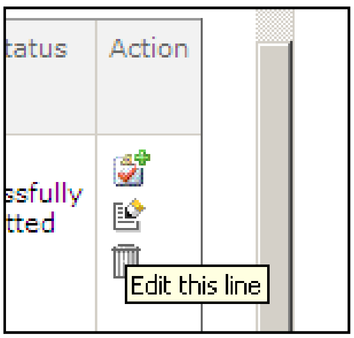
14. Once you have correctly entered the required data, click the **"Submit"** icon under the **"Action"** column. Doing so will calculate the **"Invoice Amount Requested"** and the **"Line Status"** column will display **"Line Successfully Submitted"**. If you failed to correctly enter all required data, a red error message will indicate the specific data to be corrected.



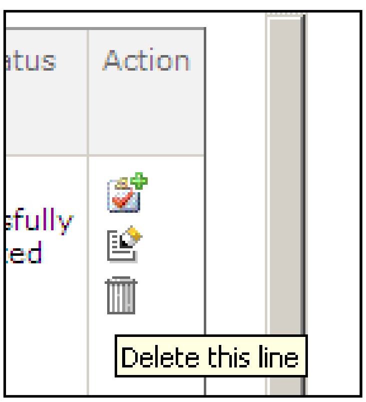
Date Of Service	Service Referral	Service	Activity	Purchased	Units	Rate Requested	Note	Rate Approved	Invoice Amount Requested	Invoice Amount Approved	Attachments	Line Status	Action
4/12/2012	AUL000020	A0160U3 - Transportation	Social Skills Development, Exercise [Completed exercise program and socialized appropriately (with verbal prompts) with others at the pool.]		24	$0.47 / MILE	Traveled from the participant's home to the YMCA, Hillcrest Drive, Charleston, WV. RT	$0.47 / MILE	$11.28	$11.28	Browse... Add Confirm	Line Successfully Submitted	

Total Amount Submitted: $11.28

15. If after submitting the line you realize something needs to be corrected, click the **"Edit this line"** icon under the **"Action"** column. This will return you to the previous page so that you may change the data that you previously entered.



16. You may remove an entire line item by clicking **"Delete this line"** icon under the **"Action"** column.



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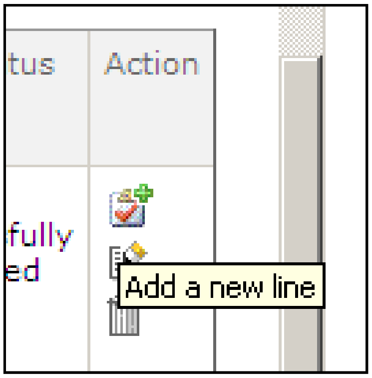
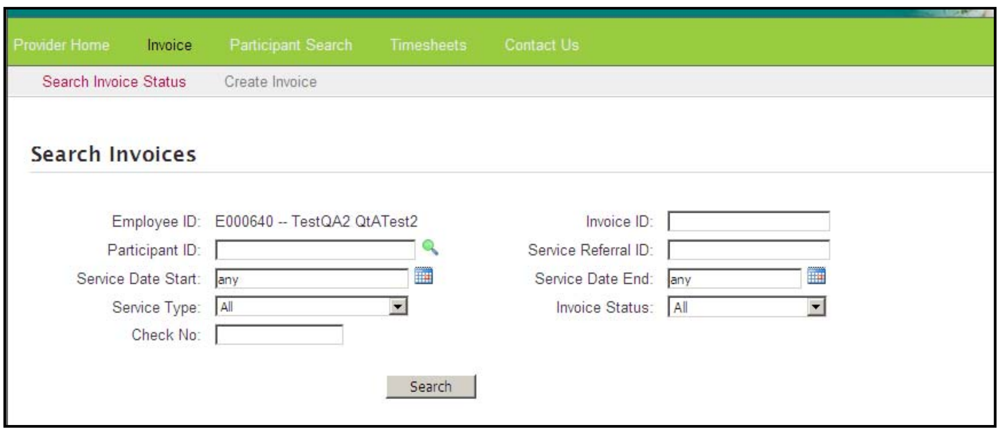
17. Click the **"Add a new line"** icon under the **"Action"** column to create additional entries for transportation provided on days throughout the pay period.



18. Once a Travel Invoice has been created/submitted for approval, you may monitor its status by clicking on **"Search Invoice Status"**.



19. Once the **"Search Invoices"** page is displayed, you can click on the **"Search"** button which will allow you to view all invoices that you have submitted.

20. You may narrow the search results by typing the participant's ID # in the **"Participant ID"** box or you may click on the magnifying glass to search for the participant by name. The search feature is handy if you work for more than one participant.

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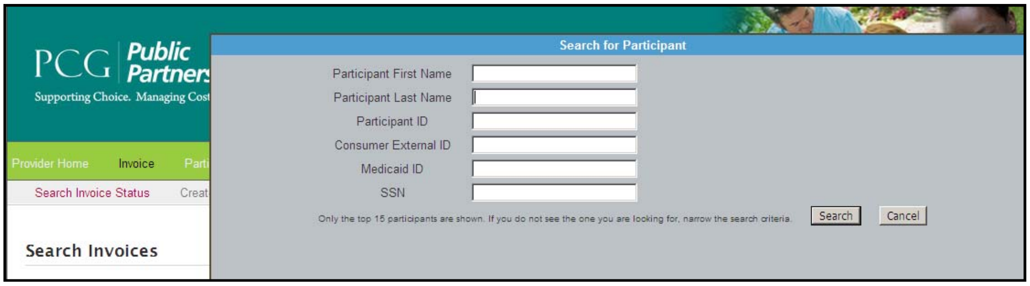
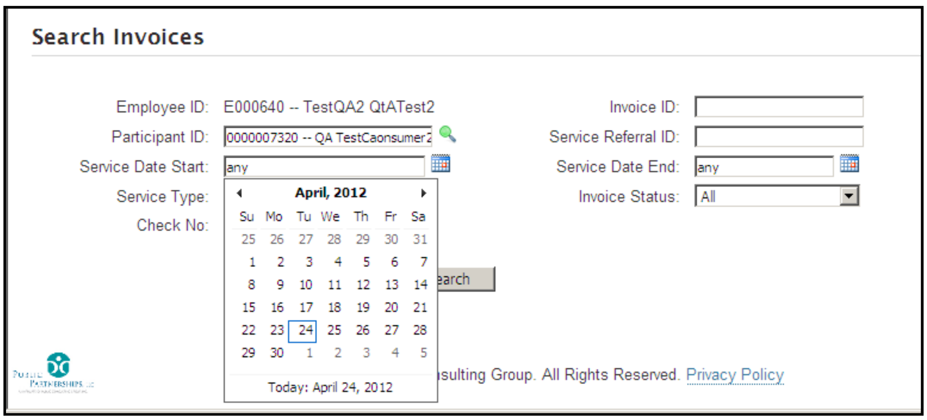


21.You may search by typing the **"Service Start Date"** of a particular invoice you wish to view. You may also use the calendar feature to enter the start date.



22.Additional search filters include:

"Service Type";

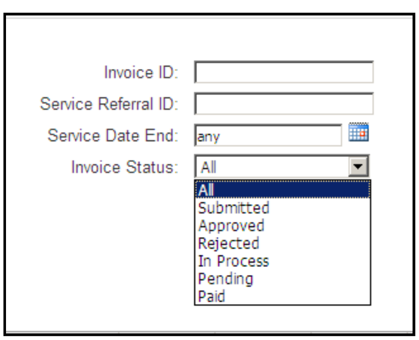
"Check Number";

"Invoice ID";

"Service Referral ID";

"Service End Date"; and

"Invoice Status"



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23. Once you entered the information for the invoice you wish to view, click the **"Search"** button. The results of your search will be displayed at the bottom of the page.

Your search found 2 records.

Action	Invoice ID	Invoice Date(s)	Submitted Date(s)	Employee Name	Submitted By	Total Amount	Check No	Payment Date	Status
Details	WVID02135	4/12/2012	04/12/12 5:41:37 PM	TestQA2 QtATest2	sburchfiel	$4.70		04/12/12	IN PROCESS
Details	WVID02141	4/23/2012	04/23/12 3:20:52 PM	TestQA2 QtATest2	rkhill	$22.56		04/23/12	IN PROCESS

The status of the invoice is displayed in the far right column of the search results:

" Submitted" – the travel invoice has been submitted but not yet approved by the participant/Program Representative;
"Approved" – the travel invoice has been submitted and approved by the participant/Program Representative;
"Rejected" – the travel invoice has been submitted to the participant but has been rejected by the participant or by PPL;
"In Process" – the travel invoice has been submitted and approved by the participant and is being processed for payment by PPL;
"Pending" – the travel invoice has been submitted and approved by the participant but not yet being processed by PPL; and
"Paid" – the travel invoice has been submitted, approved by the participant, processed by PPL and the payment has been issued or will be issued to the employee on the next scheduled payday.

24. You may click on the "Details" button to view specific details of the travel invoice.

Employee Invoice WVID02135 Details

Employee ID:	E000640	Employee Name:	TestQA2 QtATest2
Employee Invoice ID:	WVID02135	Invoice Status:	IN PROCESS

Service Referral ID Service Description CPT Code	Participant Name Participant ID	Date Of Service Time In Time Out	Submitted Date	Activities	Attachments	Notes	Requester Notes	Check Notes	Purchased	Rate	Units	Amount To Be Paid
AUL000015 Transportation	QA TestCaonsumer2 CID: C000102	11/01/11	04/12/12		Manage Files...				0	$0.47	10.00	$4.70