ICM Service Provider Portal

How to Create and Update Invoices

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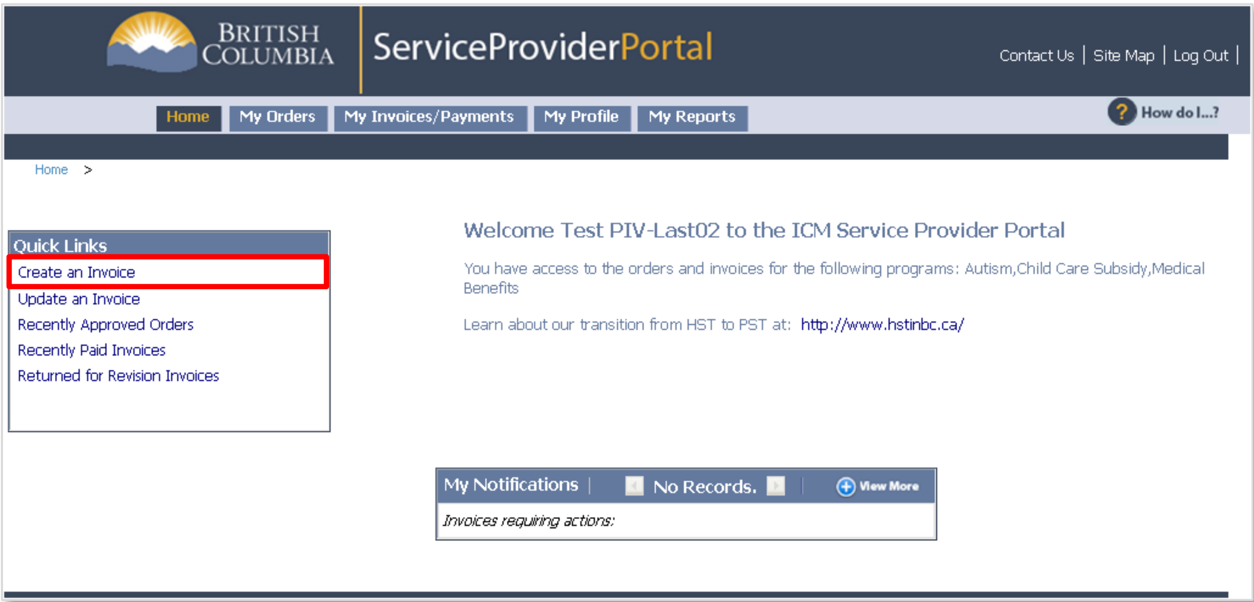
About Invoices

Parents choose a service provider which provides the type of service they require, and notify the Autism Funding Branch using a Request to Pay Service Providers/Suppliers form. After the form is reviewed a letter is sent to both the parent and the service provider that includes a billing number.

To receive a payment for services provided, service providers must submit an Invoice. The Invoice can be submitted electronically in the Service Provider Portal or by mail, fax, or email. The Autism Funding Branch will process the payment and either mail a cheque, deposit payment directly to the service provider's bank account or contact the service provider if further clarification is required.

Creating an Invoice

The Home screen of the Portal has Quick Links for common Invoice functions and searches including "Create an Invoice".

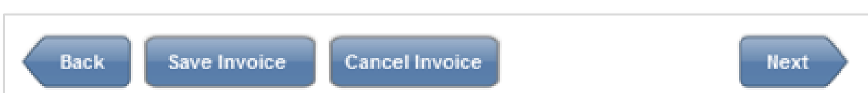


Clicking the "Create an Invoice" link creates a new Invoice and navigates you to the first step in the Create/Update an Invoice process.

Create/Update an Invoice Process

Navigation

When you create a new Invoice or update an existing Invoice you will be navigated to the Create/Update an Invoice five step process. Use the buttons at the bottom of the screens to navigate through the process or to Save or Cancel the Invoice.

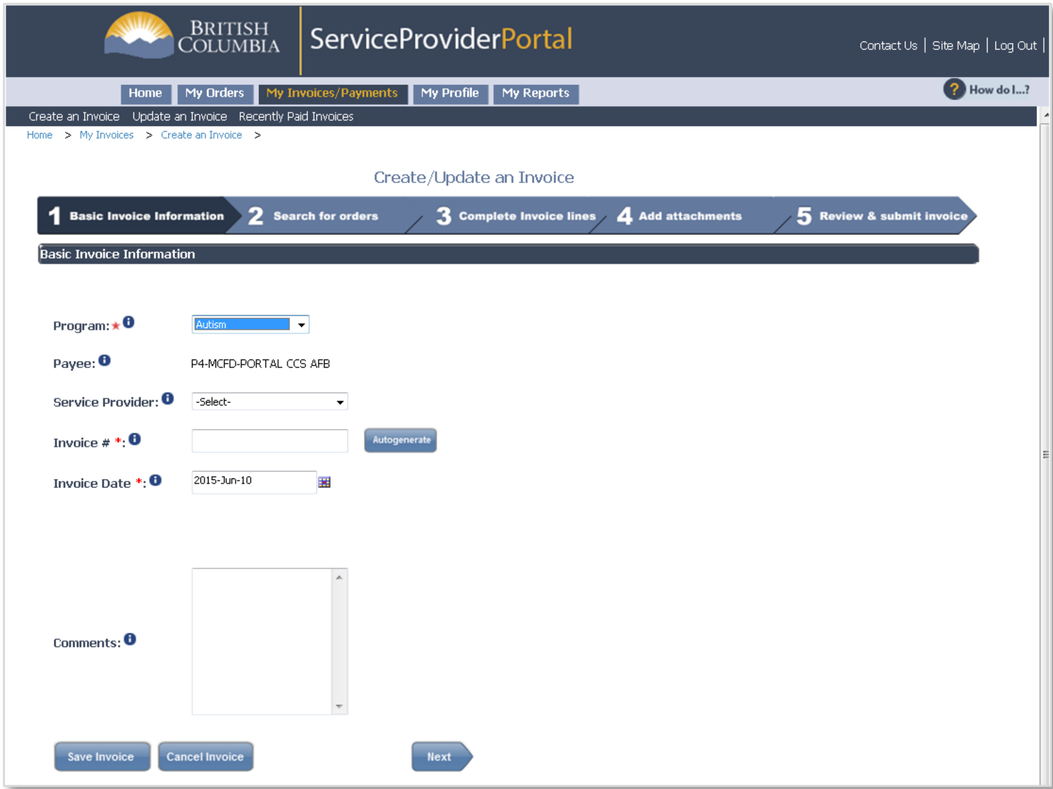


Note: The Invoice is automatically saved when you click Next. The "Save Invoice" button only needs to be used if you want to save your progress and return to the Invoice at a later time to complete it.

It is NOT recommended to use the browser's Back arrow to return to the previous screen, or press any buttons while the system is processing as either will lead to an error message.

1: Basic Invoice Information

This step captures the Basic Invoice Information including the Program, Service Provider, and the unique Invoice number.

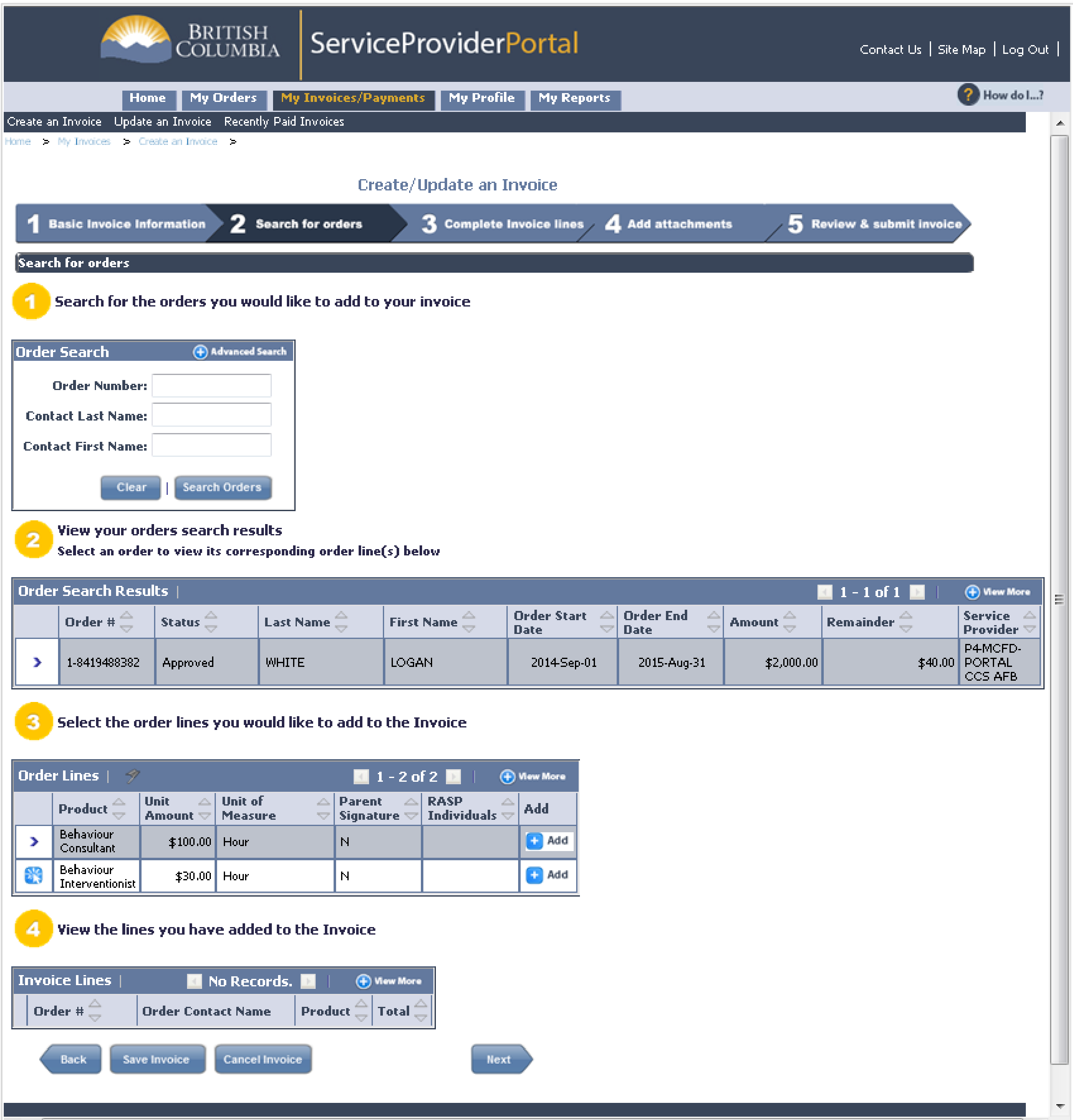


- Program: The ministry case type associated to the Invoice (Autism)
- Payee: The organization or individual to receive payment from the ministry. The payee cannot be changed in the Portal, it is set by the ministry based on your organization structure.
- Service Provider: The Service Provider
- Invoice #: The invoice number must be unique to your organization on each invoice. You can enter a number you determine or click the “Autogenerate” button to have a unique number entered for you.
  - Note: You can enter your Invoice number from your accounting program here as long as it is a unique number for each invoice. The Invoice Number can include both numbers and letters.
- Invoice Date: This is the date of the Invoice and defaults to the date it was created. You only need to change this date if you require a different date recorded for your own accounting reasons.
- Comments: This is an optional field if you have information you wish to communicate to the ministry. Changes (such as address change, etc) should be communicated to the ministry by calling the Autism Funding Branch.

After completing the required fields, click Next.

2: Search for Orders

This step allows you to add Order Lines to the Invoice. An Order represents approved funding for the child and the Order Number is commonly known as the “Billing Number” by Service Providers.

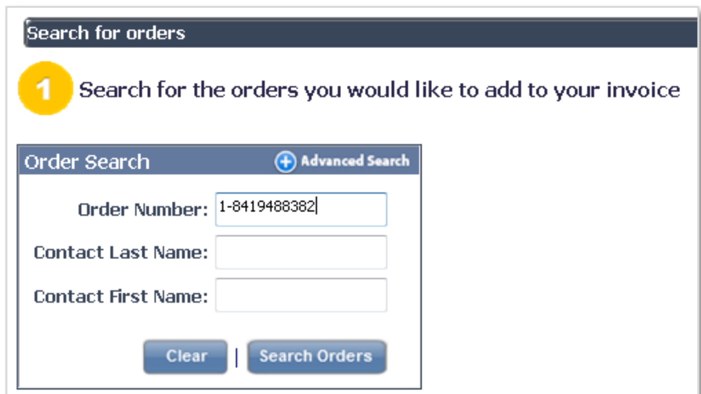


Section 1: Search for the orders you would like to add to your invoice

The Order Search section may display with the basic search options or the advanced search options, click the Advance Search button to toggle between views

Searching for Orders is not a required step, it is a tool that can be used if you are looking for a specific child or Order to add to the Invoice. Searching using the Order Number (known as the Billing Number) is recommend as all the previous Orders are also visible in this view and it is important to select the current Order for the Invoice

- Order Number: Commonly known as the Billing Number
- Contact Last Name/Contact First Name: The child's name

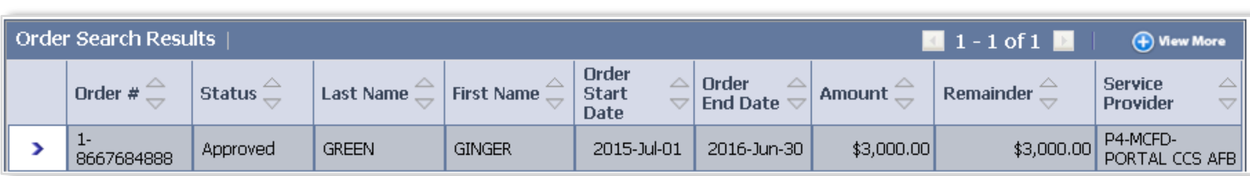


If you have entered information here and want to clear it, click "Clear" and then "Search Orders" again to see all available Orders.

- Note: Only one child can be added to an invoice.

Section 2: View your order search results;

This section displays all the approved Orders. If there is more than one Order, you can select the required Order by clicking on the selector icon

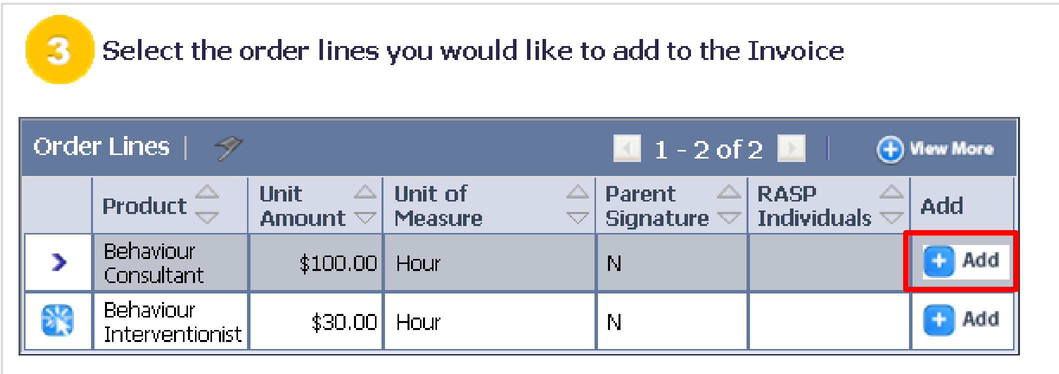


	Order #	Status	Last Name	First Name	Order Start Date	Order End Date	Amount	Remainder	Service Provider
›	1-8667684888	Approved	GREEN	GINGER	2015-Jul-01	2016-Jun-30	$3,000.00	$3,000.00	P4-MCFD-PORTAL CCS AFB

Section 3: Select the order lines you would like to add to the Invoice

After selecting the required Order in Section 2, the available Order Lines will display in this section. To add an Order Line to the invoice, click the Add button located on the right of the Order Line.

Add

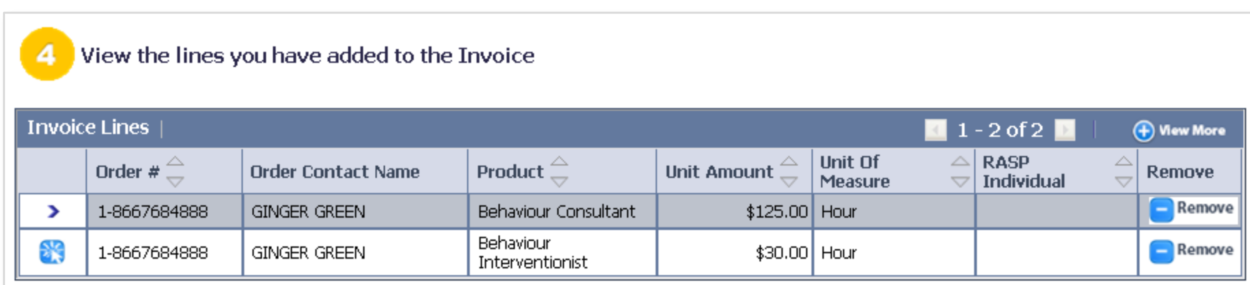


You can click the selector icon beside the Order Line to highlight that line, but you do not need to select the line before adding it to the Invoice

- Note: There isn't a function to add all or add multiple Order Lines in one click, you will have to click Add for each Order Line you wish to add to the Invoice.
- If you have multiple rates for the services you provide, you may have an Order Line for each rate. If there are not separate Order Lines for each rate, you may need to contact the Autism Funding Branch to have the Order Lines adjusted.
- Some Products and Services are not supported for Portal Invoices such as equipment and Orders that require a Parent Signature. Please submit invoices for these products and services by mail, fax, or email.

Section 4: View the lines you have added to the Invoice

After you click Add for Order Lines in the previous section, they will display in this section as Invoice Lines.



If an Invoice Line needs to be removed from the Invoice, click the Remove button located on the right of the Invoice Lines section

Remove

After adding all the required Order Lines to the Invoice, click Next.

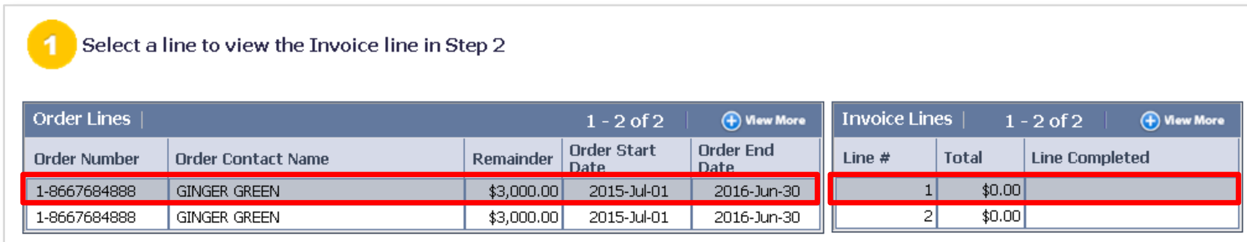
3: Complete Invoice Lines

This step allows you to complete the dates and total hours you provided service for the client. If you need to remove an Invoice Line from the invoice, you can click the "Back" button at the bottom of the screen. It is NOT recommended to use the browser's Back arrow to return to the previous screen, or press any buttons while the system is processing as either will lead to an error message.

BRITISH COLUMBIA

Section 1: Select a line to view the Invoice line in Step 2

This section displays all the Order Lines attached to the Invoice as Invoice Lines and their completion status. You cannot select or change information in this section directly, the changes are made in Section 2 below and then the details automatically update into this section. The Order Lines on the left show the Order Lines you added to the Invoice and the amount remaining on the Order. The Invoice Lines on the right will show the amounts you are billing on the Invoice for services provided.



The Order Line / Invoice Line highlighted in blue is the active line being worked on in Section 2 below. After that line is completed, the Total amount will be updated, the “Line Completed” field will be updated, and the next Order Line / Invoice Line will be highlighted.

The “Line Completed” field will have one of three symbols when it is completed (it will be blank if not completed):

- This means the Invoice Line information entered is valid.
- This means the Invoice Line information entered is valid, but it will require additional review by the ministry before approval.
- This means the Invoice Line is not valid and the Invoice cannot be submitted with the details entered in Section 2. Review the Notification in Section 2 for details.

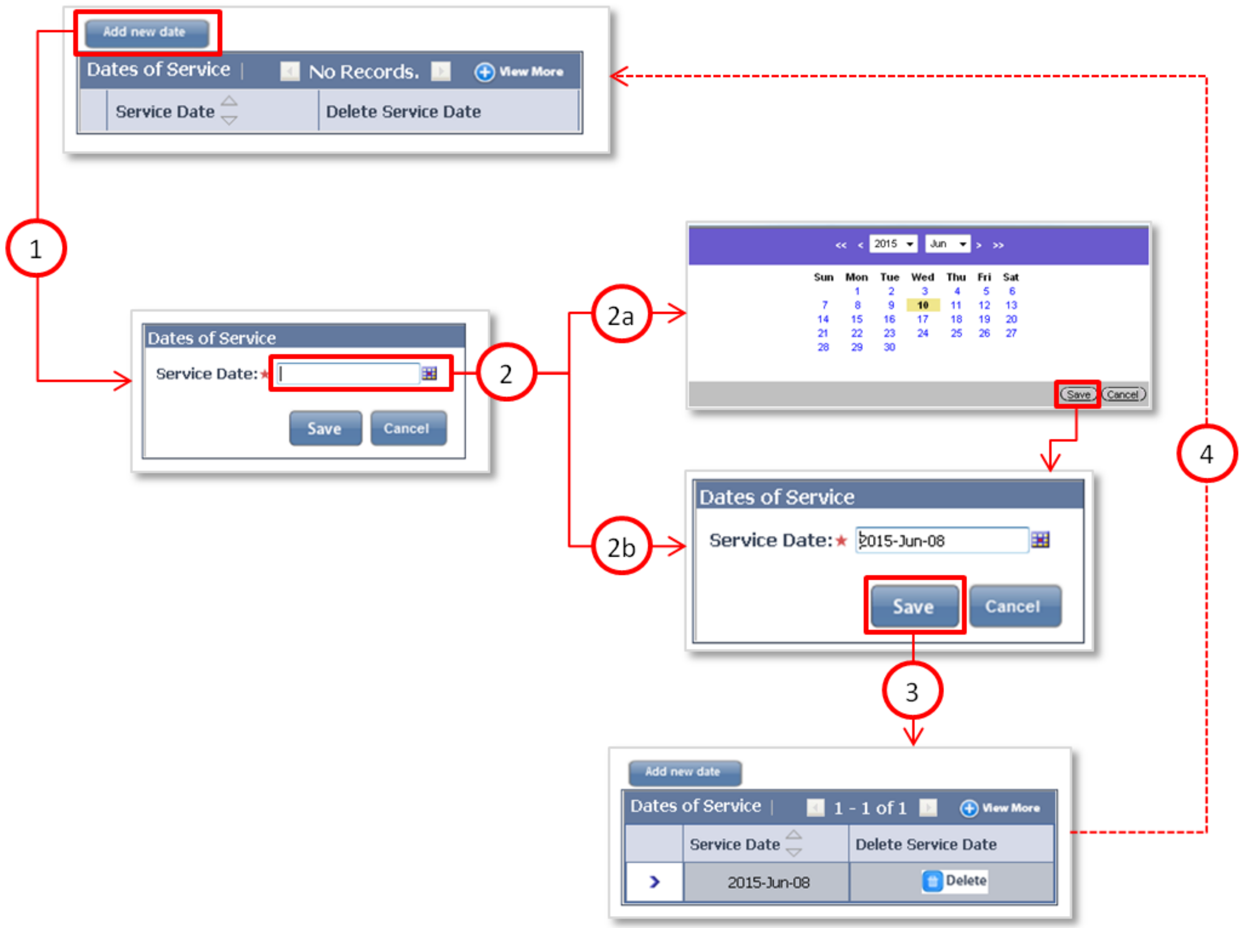
Note: The Order Lines and Invoice Lines tables in this section sometimes are not aligned, especially when there are multiple lines.

Section 2: Complete Invoice Information for each line

This section allows you to enter the Dates of Service and the Quantity (total number hours or days of service for all Dates of Service entered) for each Invoice Line.

Dates of Service

The Dates of Service are required for each Invoice Line. Click the “Add new date” button to select the Date of Service, save and repeat for each Date of Service you are billing for on the Invoice.



1. Click the “Add new date” button
2. Enter the date:
    a. Using the calendar button to select the date from the calendar and then click Save
    b. **OR** by typing the date in using YYYY-MMM-DD format

        Example: 2015-Jun-08 or 2015-06-08
3. Click Save and the date will be displayed as one of the added Dates of Service.

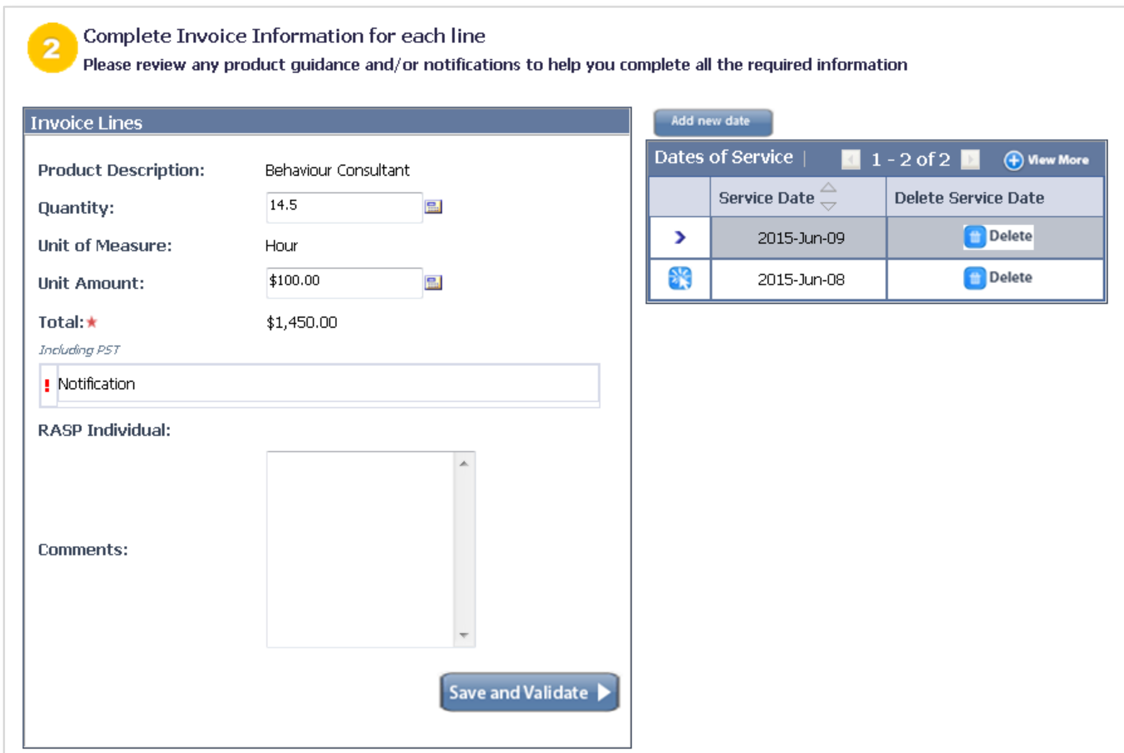
    You can click the Delete button if the date needs to be removed Delete
4. Repeat if there are more dates to add.

Invoice Lines

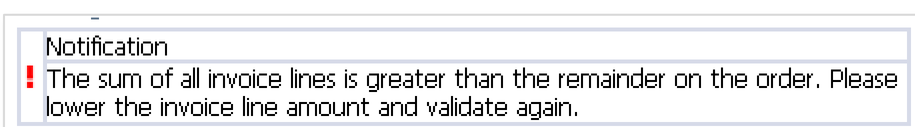
The hourly or daily rate is automatically populated in the Unit Amount field. You can change this amount if necessary but you cannot increase it above the amount Approved on the Order Line. You must type the total number of hours or days for this Invoice Line in the Quantity field and the Total amount will be calculated automatically.

- Note: The number added in the 'Quantity' field is the total billing for the Invoice Line, *not* for each date.

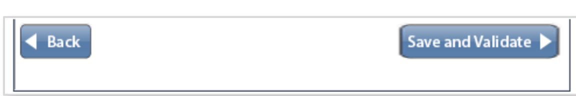
You must enter any related comments in this screen, which will be reviewed by the ministry. For example, if you selected "Specialized Therapies" as the type of service provided, you will need to include what the specialized therapy was, such as "Music Therapy".

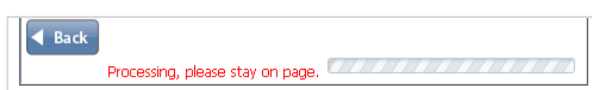


The Notification section will update if there is an error or other notice.



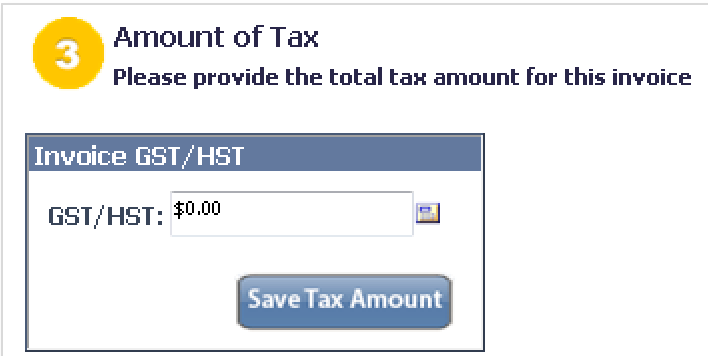
After you have completed the details in this section, you click the "Save and Validate" button. If you need to navigate between Invoice Lines, use the "Back" and "Save and Validate" buttons in this section.





Section 4: Amount of Tax

The GST amount for the entire invoice can be added in this section (if applicable). You must type the amount and then click the “Save Tax Amount” button. The amount entered will be displayed in the final step of the invoice process.



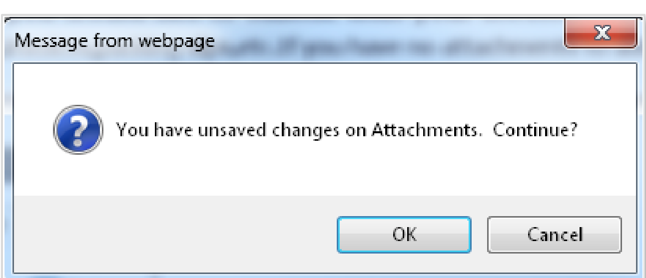
Once all Invoice Lines are completed, click the Next button.

4: Add Attachments

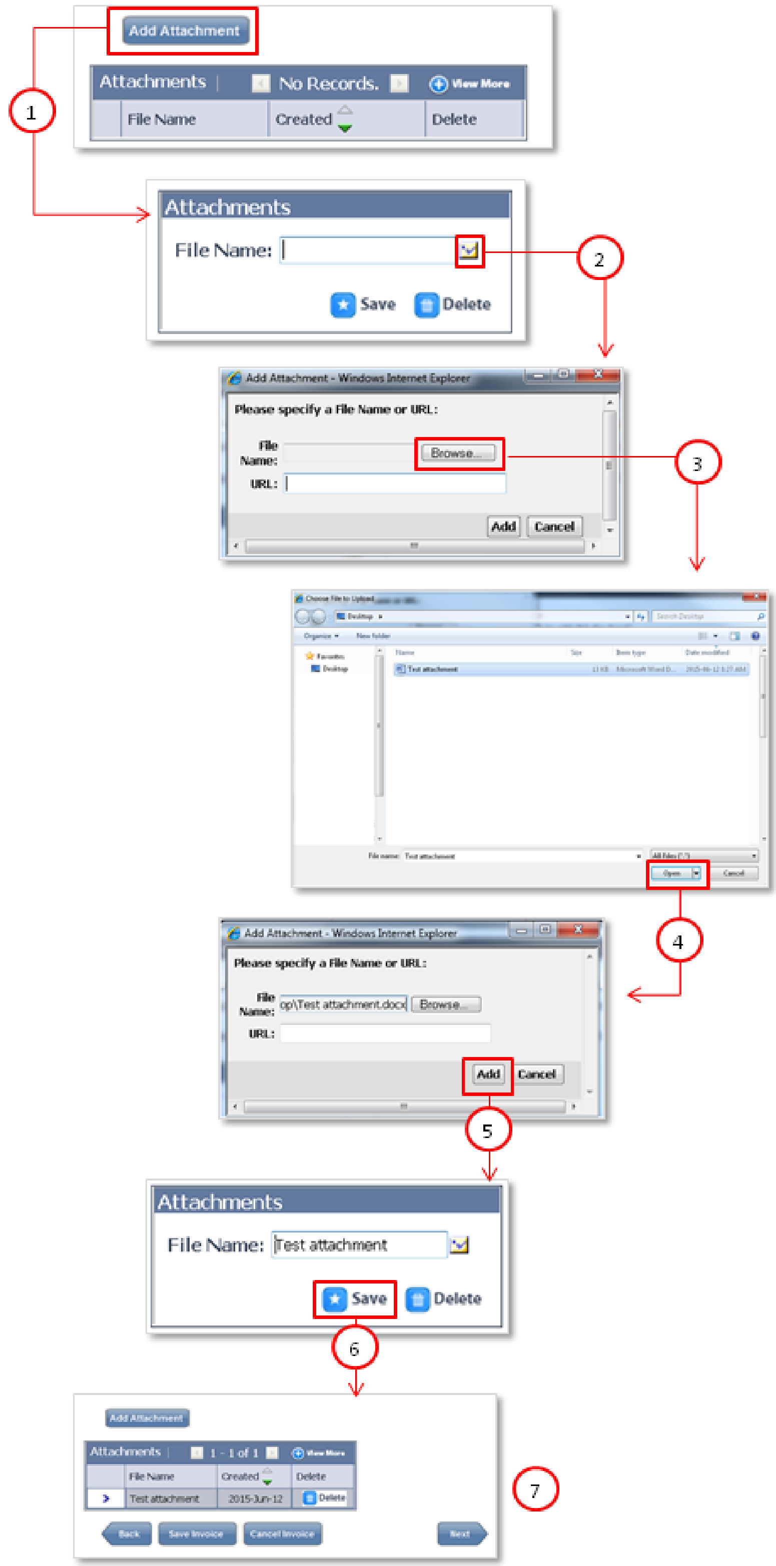
This section gives you the option to add an attachment to submit to the Ministry with your Invoices. If no attachments are required, click Next.

Adding attachments is a required step if services provided were for a child under 6 and the RASP professional is a Category B provider because their supervisor’s signature is required on the invoice. Use the Invoice Attachments to attach a copy of the signed invoice. If the invoice is not signed by the supervisor, the invoice will be returned.

There are many steps, detailed on the next page, to successfully attach a document to the Invoice. If you click “Next” and get the message “You have unsaved changes on Attachments. Continue?” this means that the document is not yet successfully attached and if you continue it will not be submitted to the ministry.



Instructions for Adding Attachments



1. Click the “Add Attachment” button

2. Click the button to the right of the File Name field

3. Click the “Browse” Button

4. The pop-up shows the documents on your computer. Locate the correct document and select it. Click “Open”

5. Confirm the file name is in this window and click “Add”

6. Click “Save”

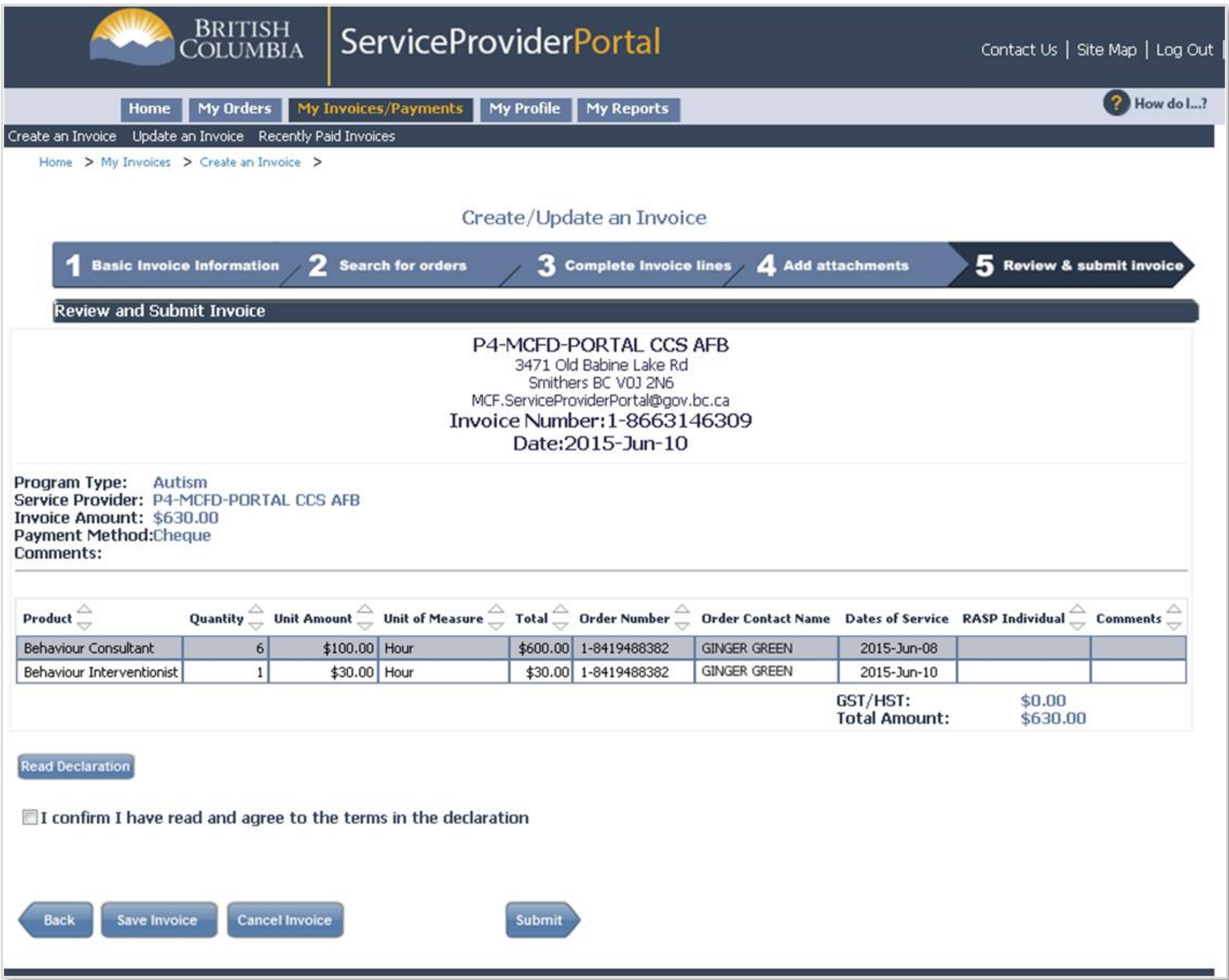
7. The Document is now attached if it is listed in this view

8. Repeat if more documents to add or click “Next” to continue with the Invoice.

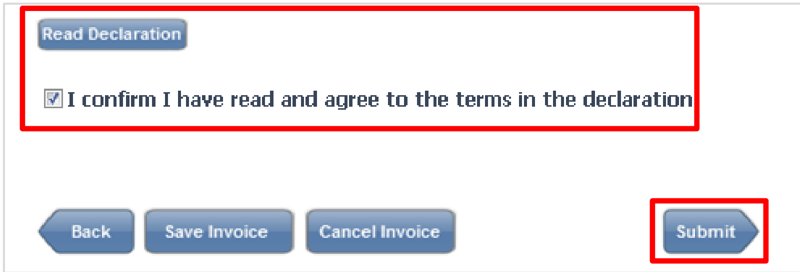
5: Review & Submit Invoice

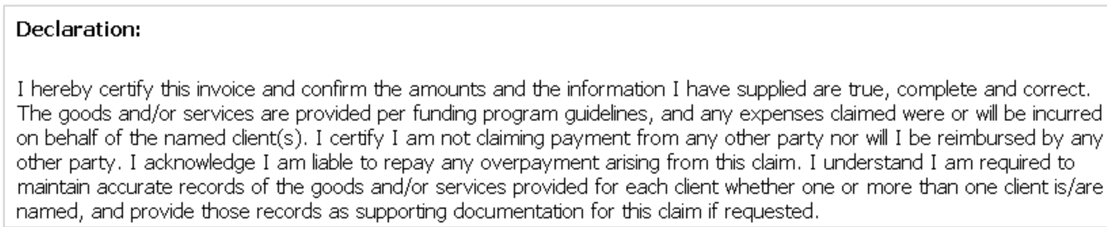
This step allows you to review all the details of the invoice prior to submitting it to the ministry. If any of the Invoice Line Total amounts or the GST amounts are not correct, use the Back button at the bottom of the screen to return to previous steps and update the information.

- Note: Only one of the Dates of Service saved for each Invoice Line is displayed in this view. The full Dates of Service can be viewed in the “Invoice and Order Summary Report”.



When you are ready to submit the Invoice, click the box to confirm you have read and agree to the terms in the declaration. The declaration can be read by clicking the “Read Declaration” button. Click “Submit” if you are ready to submit the Invoice.

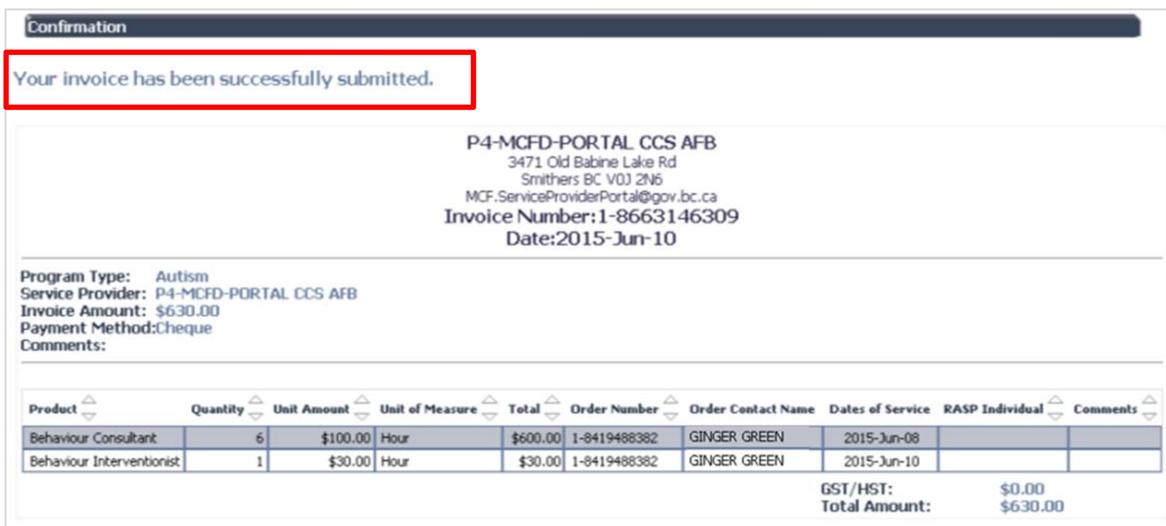




Declaration:

I hereby certify this invoice and confirm the amounts and the information I have supplied are true, complete and correct. The goods and/or services are provided per funding program guidelines, and any expenses claimed were or will be incurred on behalf of the named client(s). I certify I am not claiming payment from any other party nor will I be reimbursed by any other party. I acknowledge I am liable to repay any overpayment arising from this claim. I understand I am required to maintain accurate records of the goods and/or services provided for each client whether one or more than one client is/are named, and provide those records as supporting documentation for this claim if requested.

After submitting the invoice, you will see a Confirmation screen indicating your invoice has been successfully submitted. You can print this screen for your records but you are able to search for the Orders and Invoices in other views if you want to print this information later.



Confirmation

Your invoice has been successfully submitted.

P4-MCFD-PORTAL CCS AFB
3471 Old Babine Lake Rd
Smithers BC V0J 2N6
MCF.ServiceProviderPortal@gov.bc.ca
Invoice Number:1-8663146309
Date:2015-Jun-10

Program Type: Autism
Service Provider: P4-MCFD-PORTAL CCS AFB
Invoice Amount: $630.00
Payment Method: Cheque
Comments:

Product	Quantity	Unit Amount	Unit of Measure	Total	Order Number	Order Contact Name	Dates of Service	RASP Individual	Comments
Behaviour Consultant	6	$100.00	Hour	$600.00	1-8419488382	GINGER GREEN	2015-Jun-08		
Behaviour Interventionist	1	$30.00	Hour	$30.00	1-8419488382	GINGER GREEN	2015-Jun-10		

GST/HST: $0.00
Total Amount: $630.00

If you see an error message instead of this Confirmation screen, the invoice has likely been submitted but you can confirm this by searching for the Invoice. To see if the Invoice just completed was submitted successfully, go to the My Invoices/Payments screen and search for the Invoice. If the invoice is in “Ready for Approval”, “Approved” or “Paid” Status then it was received successfully by the ministry. It if is in another Status, such as “Pending” or “Cancelled”, then it has not been received by the ministry.

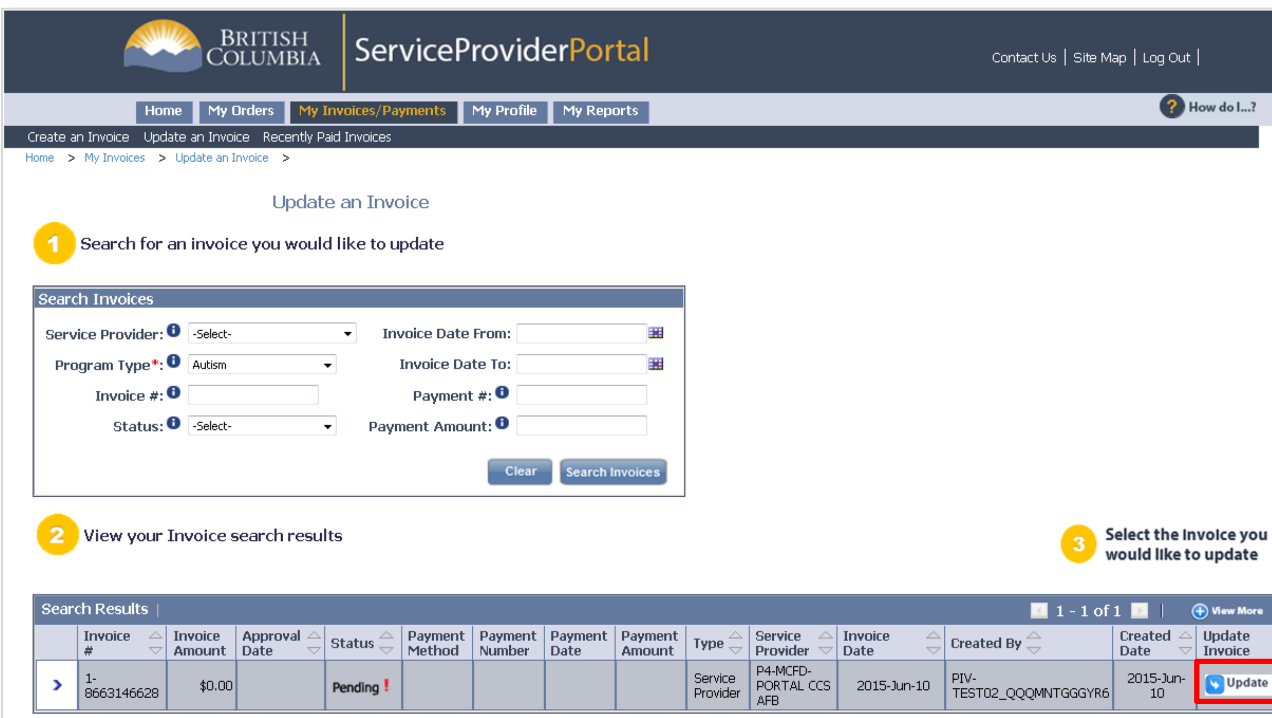
Cancel or Update Invoice

Invoices created and not submitted or cancelled are saved in a Pending state. These invoices may have Order Lines tied to them, which may prevent you from billing these Order Lines on another Invoice.

After you submit an invoice through the Portal, it will be validated by ministry staff. The ministry cannot change information you have entered on invoice lines. This is to preserve the financial integrity and audit trail of the record. If changes need to be made, the ministry program will electronically return the invoice through the Portal and send you an email or call you explaining the revisions required.

Pending and Returned for Revision Invoices are displayed on the Home screen in the My Notifications section. You can also search for a specific Invoice using the “Update an Invoice” quick link on the Home screen or at the top of the My Invoices/Payments screen.

1. Locate the Invoice
    - From the My Notifications on the home screen: Click on the Invoice Number, or
    - From the “Update an Invoice” link: enter details in the Search Invoices section and click “Search Invoices”. When the Invoice is located, click Update



2. This will navigate to Step 1 of the invoice creation process
    - To Cancel the Invoice, click “Cancel Invoice” at the bottom of the screen, or
    - To Update the Invoice, enter invoice details and click “Next” to navigate through screens that are already fully completed.

If you need to update an Invoice that has already been submitted to the ministry, please contact the Autism Funding Branch to have the invoice Returned for Revision.

Invoice Frequently Asked Questions (FAQ)

Q: I'm creating an invoice but I don't see any buttons and I can't scroll. What is causing this?

A: The most likely cause of this issue is trying to use the Portal on a mobile device (such as a phone or tablet) or using a browser that isn't supported for the Portal. To use the Service Provider Portal, it is recommended you use one of the following operating systems and Internet browsers:

Operating Systems:
- Windows Vista (32 bit)
- Windows 7 (32 bit)

Browsers:
- Internet Explorer (version 7 or later; system is currently optimized for IE 8)
- Google Chrome (version 22)
- Firefox (15)

Q: I got an error message when submitting an Invoice, how do I know if it was received?

A: To see if the Invoice just completed was submitted successfully go to the My Invoices/Payments screen and search for the Invoice. If the invoice is in "Ready for Approval", "Approved" or "Paid" Status then it was received successfully by the ministry. It if is in another Status, such as "Pending" or "Cancelled", then it has not been received by the ministry.

In the Search Invoices section:

- Choose "Autism" in the Program Type field, and enter the Invoice number in the Invoice # field

Q: How do I print Invoices?

A: There is no print feature built into the Portal so you will use the print features on your internet browser. You may want to use Print Preview before printing and adjust the print settings so the Invoice prints on one page.

You can print from the Confirmation page when you submit an Invoice or search for the Invoice at any time. The best view to print from is the Invoice Detailed view as it shows all the Order Lines associated to the invoice. To see this view, search for the invoice and then click on the Invoice Number in the Search Results section of the My Invoices/Payments screen.

Q: How can I practice creating an Invoice?

A: The Portal is used for transactions so there is no ability to complete a practice Invoice.

Q: I have submitted the Invoice and need to make changes to it. How can I get it back?

> **A**: Contact the Autism Funding Branch as soon as possible. We may be able to return the Invoice to you for revision.

Q: Is there any difference in what I can see or bill for between submitting paper invoices versus Portal Invoices? Is there any risk that I would be able to bill too high of an amount?

> **A**: There is no difference in what you can see or what you can bill for by using the Portal to submit Invoices instead of submitting a paper Invoice.
>
> In accordance with Freedom of Information and Protection of Privacy legislation, individuals authorized to access the Portal are able to see information pertaining to all the children for whom your organization is authorized to provide services. This information is the same as what you currently receive in paper format (eg. the name of the individual receiving service or the amount and types of service authorized).
>
> Parents choose a service provider which provides the type of service they require, and notify the Autism Funding Branch using a Request to Pay Service Providers/Suppliers form. After the form is reviewed a letter is sent to both the parent and the service provider that includes a billing number. Invoices in the Portal cannot be completed for more than the amount approved based on the Request to Pay.
>
> There are validations in the Portal to calculate amounts correctly. All Invoices are reviewed by ministry staff prior to being approved for payment.

Q: I got a notification that the parent/guardian has requested to sign the invoice before it is submitted and I cannot continue. Can this be done in the Portal?

> **A**: No. As the parent/guardian has requested to sign the invoice, please submit an invoice by mail, fax or email.

Q: I am trying to submit an Invoice for an Order Line that I know I haven't billed on yet but I can't find it on Step 2 of the Create Invoice process to add it to the Invoice. What do I do next?

> **A**: If the Order Line is already associated to another Invoice and an amount is saved, you may not be able to add the Order Line to another Invoice. Check for any other pending Invoices and either complete or Cancel those invoices.
>
> If this does not resolve the issue, and you have been informed that the Order Line is approved for the child, please call the Autism Funding Branch.

Q: Can I add more than one "Dates of Service" to the Invoice?

A: Yes. After adding a date of service, click the "Add new date" button again to repeat the steps and add another date. Only one date displays on the final Invoice screen, but all Dates of Service for the Invoice can be viewed in the "Order and Invoice Summary Report".

Q: Where can I find information about payments and other Autism Funding program information?

A: Please visit the Autism Funding Branch website. There is information in the Information for Service Providers page.