TELUS health solutions

# WorkSafeBC Provider Portal

## Invoicing

## User Guide

(Version 5.3; 2014.10.20)

# Table of Contents

# Document Revision Log

| Revision Number | Revision Date | Changes Requested By | Reason for Change | Author |
|---|---|---|---|---|
| Version 5.0 | Aug 10, 2011 | | Final – Stage 1 | THS |
| Version 5.1 | Apr 11, 2012 | | Enhancements to Portal V2.1.More Details in Appendix B. | THS |
| Version 5.2 | Nov 14, 2012 | | Enhancements to Portal V2.3. | THS |
| Version 5.3 | Oct 20, 2014 | | No changes to content; some images were resized or recaptured to improve presentation. Aligned document version number and date with other user guides only. | THS |
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# Disclaimer

The examples presented in this document are taken from a test environment, using test data not actual claim information.

# 1 Introduction and Overview

## 1.1 Provider's Business Perspective

1. From the provider's business perspective, the system allows the provider to access the portal and create invoices and submit electronically to WorkSafeBC for payment;

2. For Stage 1, we are keeping the process as simple and as straightforward as possible in part to minimize the degree of change and any complexity;

3. Invoicing, for Stage 1, must be submitted in the context of an existing Referral or Case:
   - The portal allows the Provider to create the invoice by drawing on the Referral or Case information and the associated program/service and Provider information;
   - Providers have submitted their Clinical Reports for a Case and now wish to invoice for the program/services.

# 2 Business Process Overview

1. Refer to the Life cycle model of an invoice showing the end to end business processes from creation through to payments – as well as including the major events and associated states and statuses:
   - Shows the end to end process chain;
   - Shows the linkages to the referral and clinical report;

2. Shows the core main line process – including the key steps and work flow. The processes align with the provider's business processes and include (also, please refer to Section 6):
   - Identify the case (i.e., that is ready for billing);
   - Confirm the specifics – claim, worker, referral (if referred) and its associated program/services and contract;
   - Confirm the triggering event (e.g., the submission of a clinical report particularly when required for proof);
   - Confirm the Program Phase/Module and/or Services that are to be billed and, where relevant, the treating practitioner;
   - Confirm the fee schedule and the fees;
   - Create amd submit the invoice;

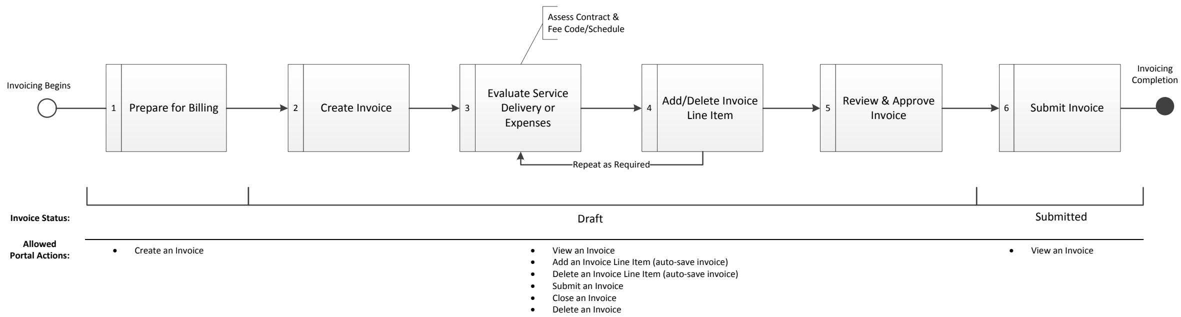
3. Exception processes include:
   - Deleting an invoice;
   - Deleting an invoice line item (cannot be modified – only deleted);
   - Changing Invoice Date – cannot be modified once saved – invoice must be recreated;

4. Other related processes as part of invoicing include;
   - Draft Invoice – invoices that are in progress, and have not yet been submitted to WorkSafeBC:
     - User is able to access these invoices through the portal to add or remove line items before submitting;
   - Submitted Invoice – Invoices:

5. Once submitted, an invoice cannot be revoked, deleted, voided or modified through the portal.

INVOICING

**Invoicing (Core Main Line)**



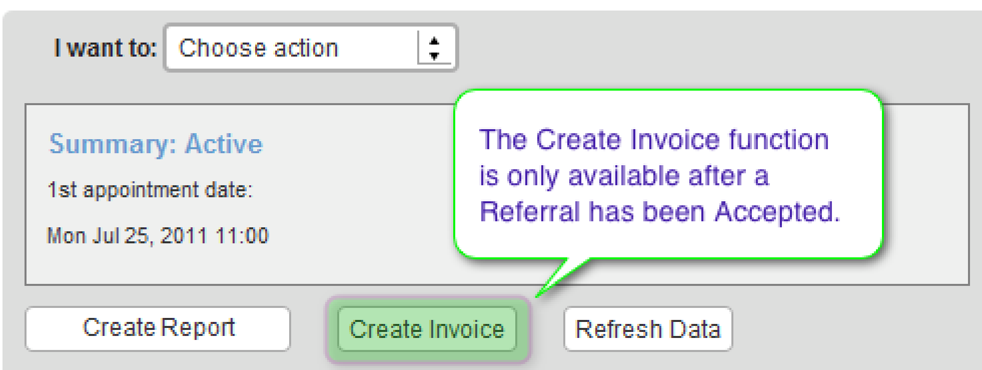
# 3 Functions and Features

## 3.1 Introduction

The key functions and features are listed below followed by specifics and examples for each:

- Create Invoice Screen;
- Submitted Invoice Screen;
- Invoice PDF;
- Invoice Work Lists;

In the portal, invoices can only be submitted in the context of a Referral or Case that is available in the portal. The Invoicing process is initiated from the Action/Summary Panel on the Referral Details Screen (or Case). *For more information on the Referral Details Screen and Action Panel, see the Referrals and Cases User Guide.*



## 3.2 Create Invoice Screen

The Create Invoice screen provides the user with the ability to create and submit an invoice to WorkSafeBC through the Portal. Components of the Create Invoice Screen include:

- Referral Header;
- Provider Information Panel;
- Invoice Header Panel;
- Invoice Line Item Entry Panel;
- Contracted Fee Code Selection Tool;
- Fee Code Lookup Control;
- Invoice Line Item Entry Display Grid;
- Invoice Attachments;
- Invoice Comments;
- Close Invoice function;
- Delete Invoice function;
- Submit Invoice function;

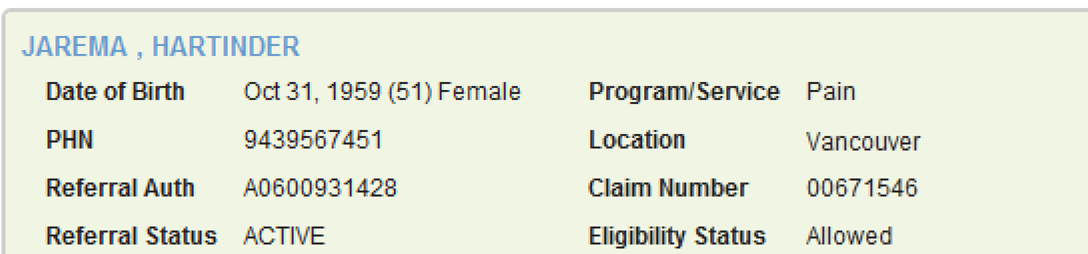
### 3.2.1 Referral Header

The Referral Header provides a summary of the most important information related to a Referral so that it is easily accessible and can be viewed quickly.

Information in the Referral Header is re-purposed for submission of invoices through the portal to minimize repetitive data entry and the potential for data entry errors.

Referral information reflects to the point of time when invoice was created and is consistent with the Referral Header visible on other screens in the portal such as the Referral Details Screen. The Information displayed in the Referral Header includes:

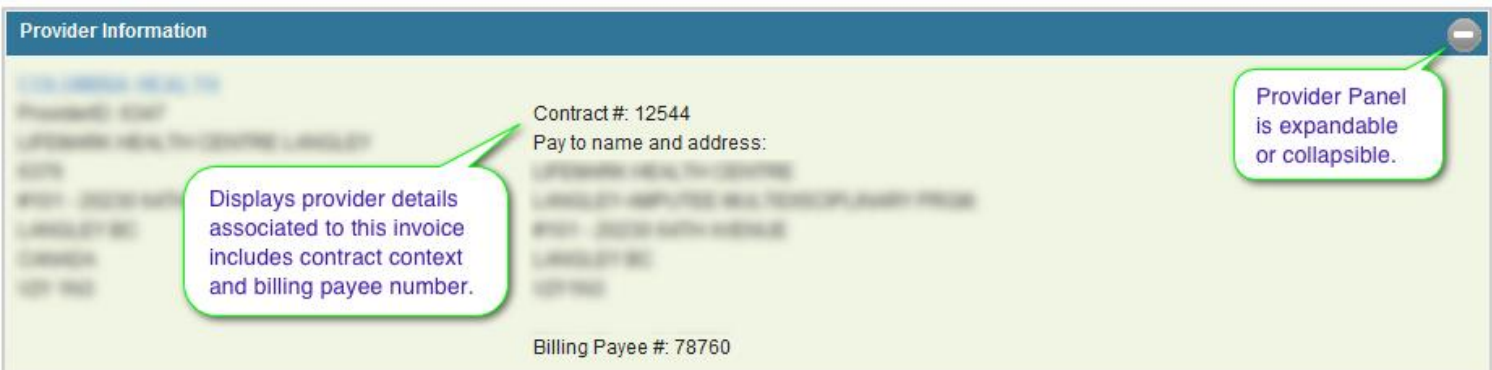
- Worker demographics and contact details;
- Referral authorization number and Claim number;
- Referred program/service and preferred Provider work location;



### 3.2.2 Provider Information Panel

The Provider Information Panel provides information related to the provider clinic location and billing address. This information is captured at the time when the invoice is first created. It does not update on subsequent saving of the invoice. The information displayed in the panel includes:

- Name of the Provider organization;
- Clinic address and contact information;
- Pay To information (i.e. where the cheque will be sent);
- Payee Number that the Invoice will be submitted under;



### 3.2.3 Invoice Header Panel

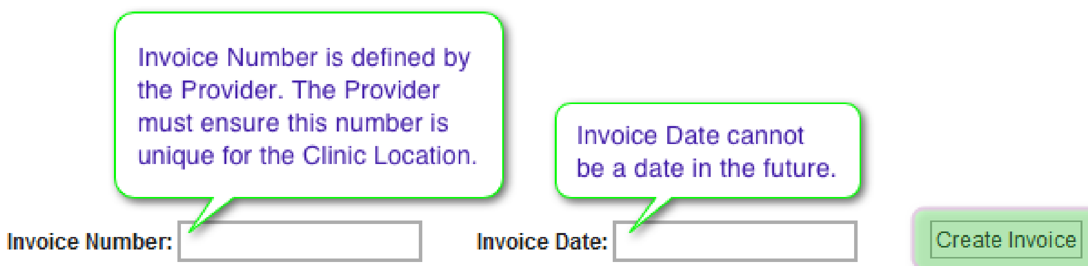
The Invoice Header Panel provides information to specifically identify the invoice. This information is entered by the user when the invoice is first created. It cannot be modified once the user has clicked on the Create Invoice command.

The information displayed in the panel includes:

- Invoice Number
- Invoice Date
  - Invoice Date cannot be later than today – i.e., cannot post-date an invoice;

Once the user clicks "Create Invoice", the invoice is saved and the Invoice Number and Invoice Date can no longer be modified. Both will display as read only in the Invoice Header.

- To enter a different Invoice Number or Invoice Date, a new invoice must be created.



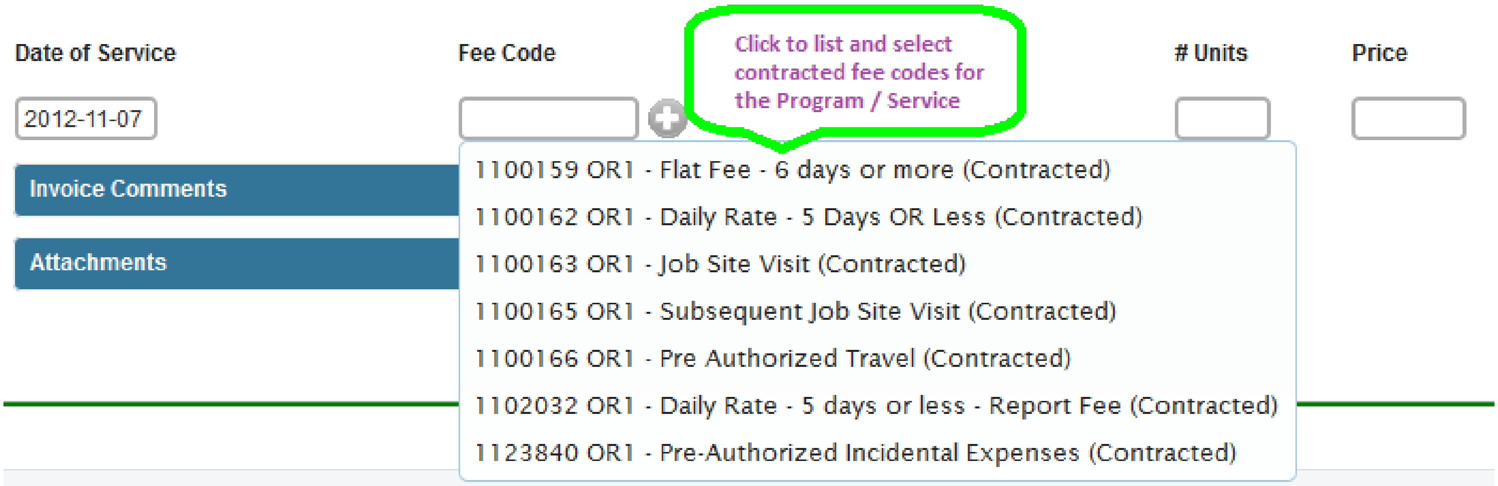
### 3.2.4 Invoice Line Item Entry Panel

The Invoice Line Item Entry Panel provides the functionality to add an invoice line item for billing of a specific program/service. Elements of the Invoice Line Item Entry Panel include:

- Date of Service;
    - The Date of Service to be entered is defined by the Provider's contract for the referred Program/Service;
    - You must enter the Date of Service first, before selecting a Fee Code. If you must change the Date of Service, then also reselect the Fee Code to ensure it is accurate to the Fee Schedule that is in effect.
- Contracted Fee Code Selection Tool;
- All Fee Codes Lookup Control;
- Unit of Measure (displayed when a fee code is entered or selected);
- Number of Units;
- Price;
- Taxes (PST and/or GST/HST)
- Add Row Button
- Copy Row Button

### 3.2.5 Contracted Fee Code Selection Tool

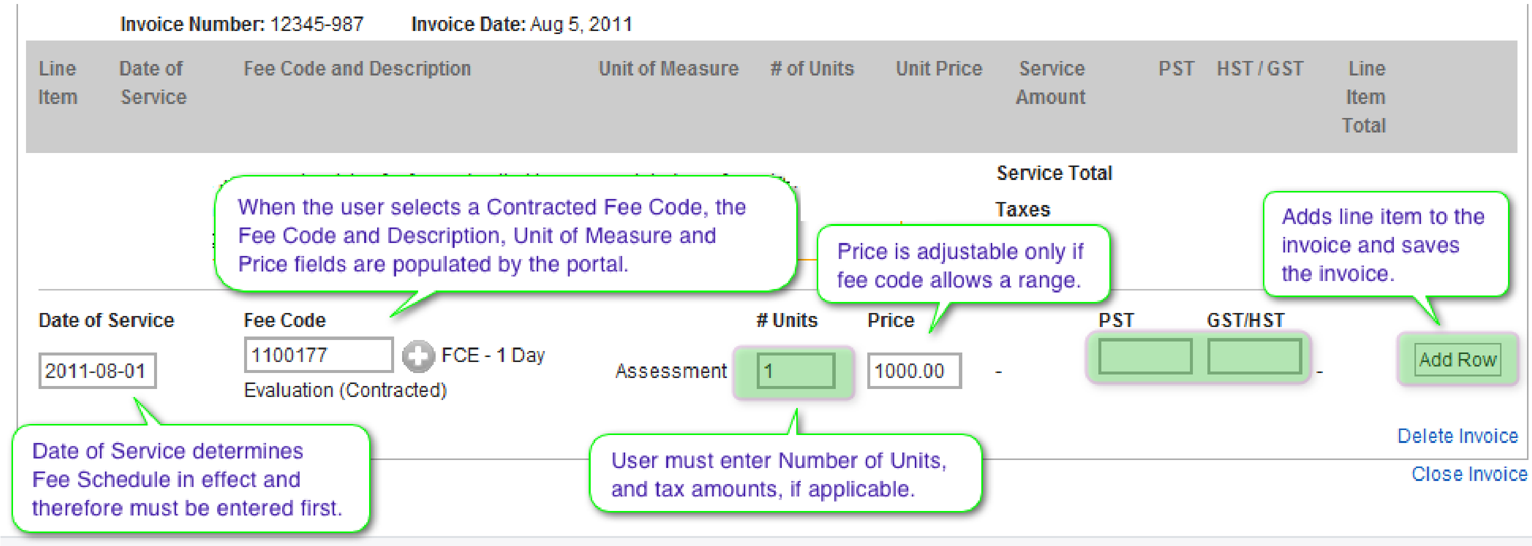
The Contracted Fee Code Selection Tool provides the functionality to quickly find and select a fee code that is contracted for the Referred Program or Service the invoice is for: To use this tool, simply click the symbol beside the Fee Code field and select the appropriate code from the list.




When a contracted fee code is selected, it will populate the Invoice Line Item Entry Panel with associated information derived from the Fee Schedule in effect, based on the Date of Service that was entered, including Unit of Measure and Price:

- Price is based on the minimum amount defined in the Fee Schedule for selected Fee Code;
    - If it is a fixed amount, the user will not be able to change this price;
    - If there is a billing range, that is dependent on a number of factors, the user will be able to change the price provided it is within the Min and Max allowable amounts for the fee code
        - Providers must know the amount that they are allowed to bill for a given fee code, within the Contract and Fee Schedule that are in effect;

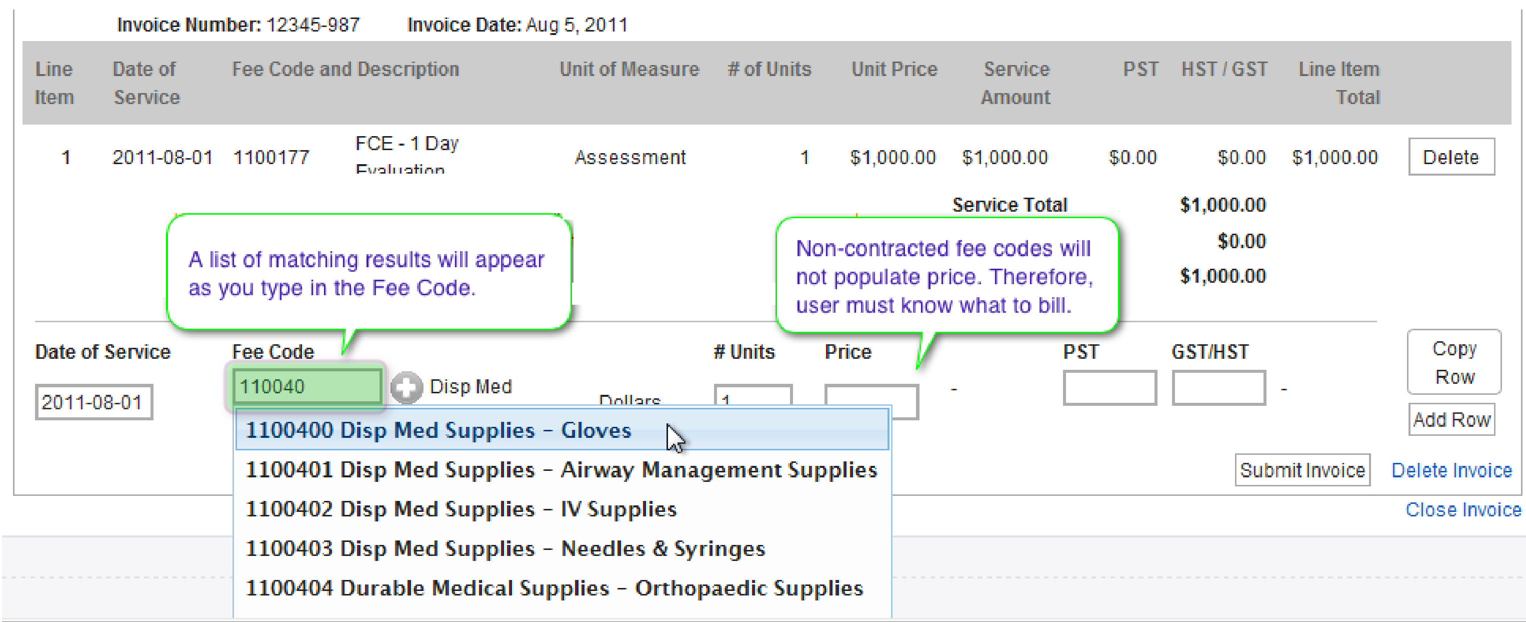
*The Contract in effect for the Invoice is displayed on the Create Invoice Screen. See Provider Information Panel for more information.*


Invoice Number: 12345-987
Invoice Date: Aug 5, 2011
Line Item
Date of Service
Fee Code and Description
Unit of Measure
# of Units
Unit Price
Service Amount
PST
HST / GST
Line Item Total
Service Total
Taxes
When the user selects a Contracted Fee Code, the Fee Code and Description, Unit of Measure and Price fields are populated by the portal.
Price is adjustable only if fee code allows a range.
Adds line item to the invoice and saves the invoice.
Date of Service
Fee Code
# Units
Price
PST
GST/HST
2011-08-01
1100177
FCE - 1 Day Evaluation (Contracted)
Assessment
1
1000.00
Add Row
Delete Invoice
Close Invoice
Date of Service determines Fee Schedule in effect and therefore must be entered first.
User must enter Number of Units, and tax amounts, if applicable.

### 3.2.6 Fee Code Lookup Control

The Contracted Fee Code Lookup Control provides the functionality to quickly add any fee code, in addition to those that are contracted for the Referred Program or Service: To use this control, simply type the fee code into the Fee Code field.

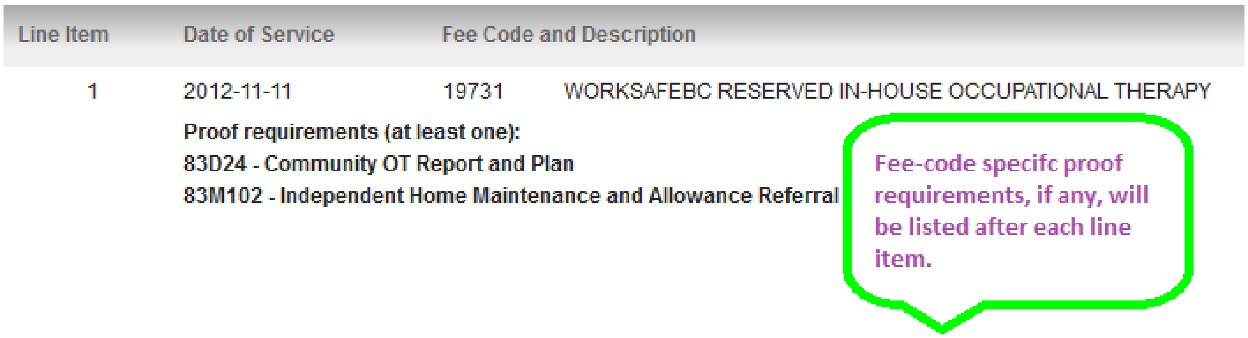
- A list of matching fee codes will immediately appear;
- Users may enter either fee code or fee code description to locate a specific fee code;
  - Partial matching is supported;
- As you type, the list will shorten for more exact matching;
- If you are invoicing for a contracted fee code, select the fee code from the list that is appended as “(contracted)”
- If you are invoicing for a fee code that is non-contracted, select the appropriate code from the list.
- Some fee codes will share the same description; hence Providers must use the right one as stipulated in their contract; note that the Portal will not determine this for them;




Once selected, the invoice line item entry line will populate with fee code and description, and unit of measure. For non-contracted fee codes, price will not be populated and the user must know the amount that is to be entered.

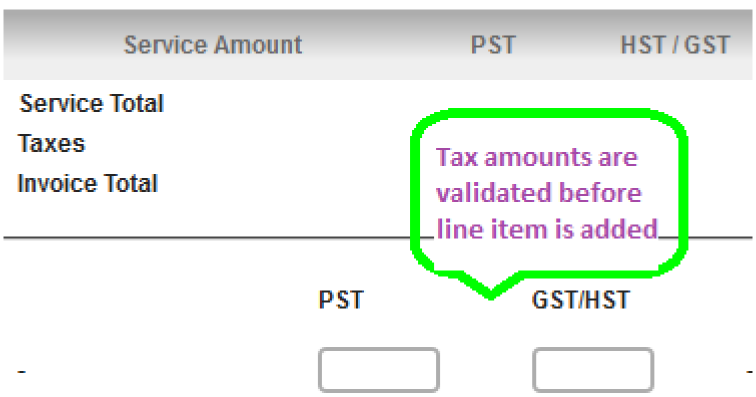
### 3.2.7 Fee Code Proof Requirements

Depending on the fee code selected, there may be Reporting proof requirements. The proof requirements, if any, will be listed under the invoice line item after the line item has been added to the invoice.



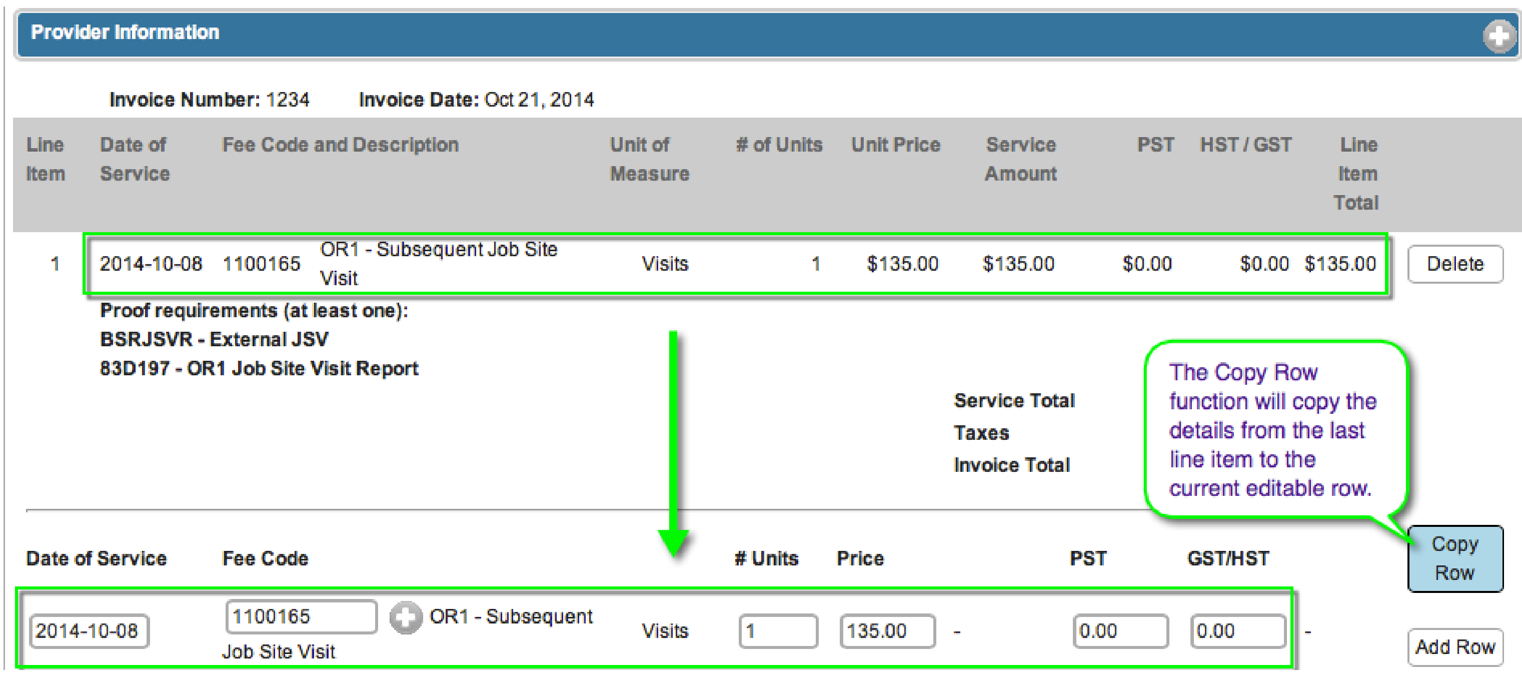

### 3.2.8 Tax Validation

The combined PST and HST/GST tax amounts cannot exceed the maximum percentage of the line item total. The maximum is specified by WorkSafeBC. If the combined PST and HST/GST tax amounts are too large, the line item cannot be added to the invoice.



### 3.2.9 Invoice Line Item Duplication – Copy Row

The “Copy Row” button will copy the data entered in last invoice line item to the currently edited row. This allows quick entry of multiple invoice line items when most information is the same from row to row, e.g. only change to date of service. Once the data is copied, it may be edited as normal. Copying the row will not automatically add the line item to the invoice; the line item must still be added to the invoice with the “Add Row” button.

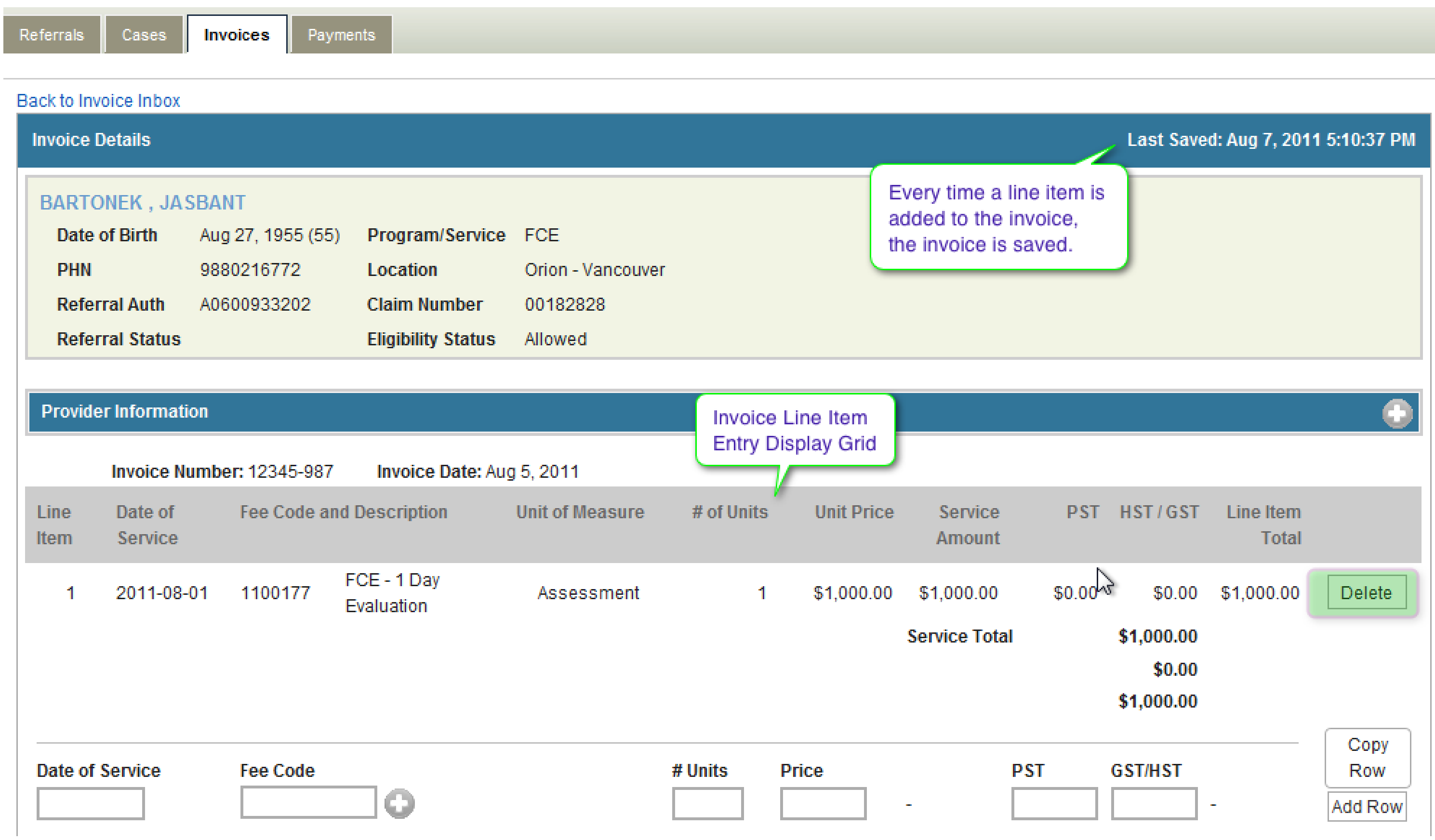


### 3.2.10 Invoice Line Item Entry Grid

The Invoice Line Item Entry Display Grid displays each invoice line item as the user had entered and added to the invoice. The grid also:

- Recalculates Service, Taxes, and Invoice Totals when each line item is added;
- Displays a Delete function for each line that is added;
    - Once added, invoice line items cannot be modified;
    - To correct a data entry error, the line item must be deleted and then re-entered;

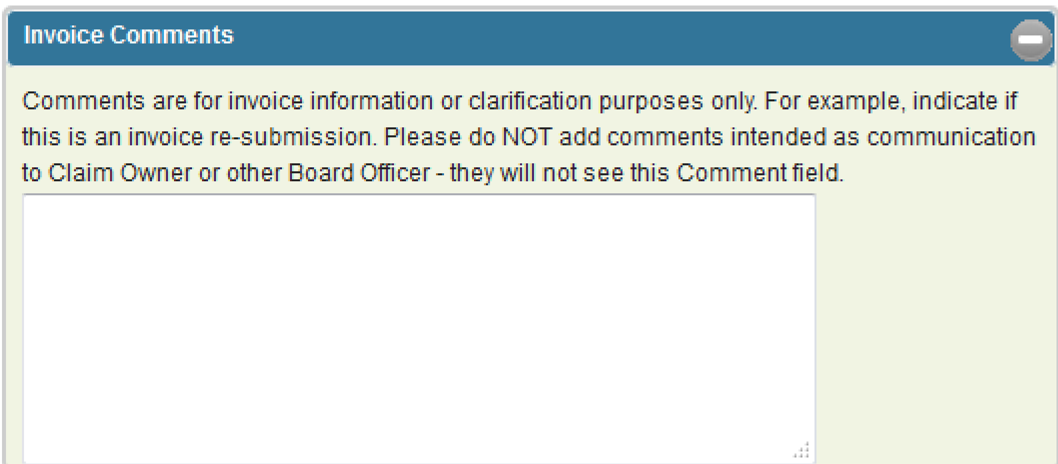
*Note: The invoice is saved every time a new line item is added.*



### 3.2.11 Invoicing Comments

Invoice comments may be entered when creating an invoice. The comments may be plain-text only; formatted text, html, rich-text, and text copy / pasted from a word processor (eg Microsoft Word) is not supported.

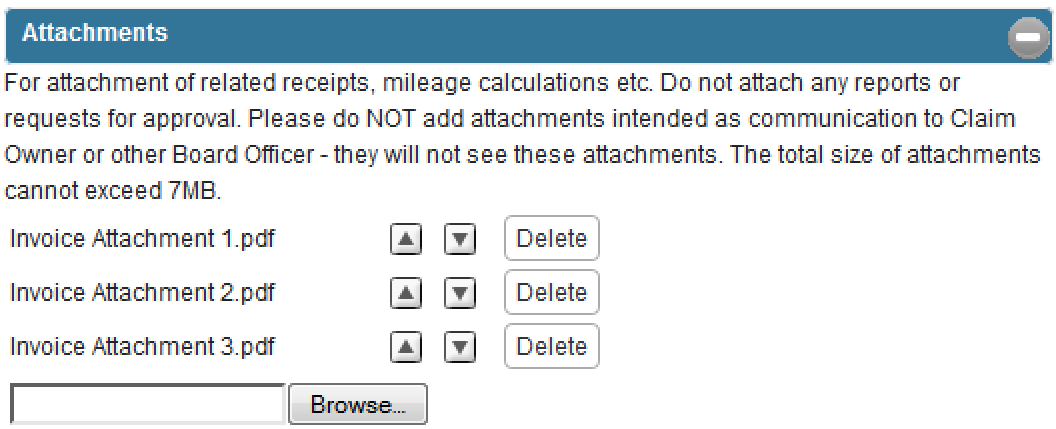
Comments are for invoice information or clarification purposes only. For example, indicate if this is an invoice re-submission. Please do NOT add comments intended as communication to Claim Owner or other Board Officer - they will not see this Comment field.



### 3.2.12 Invoice Attachments

PDF attachments may be included with a Portal submitted invoice. The attachments are intended to be invoice supporting documents, such as related receipts, mileage calculations, etc. **Do not attach any reports or requests for approval**.

The attachments must be PDF file format, and the combined size cannot exceed 7MB. The PDF files will be combined into a single PDF, and submitted to WorkSafeBC as part of the invoice.



### 3.2.13 Saving Invoice as a Work In Progress

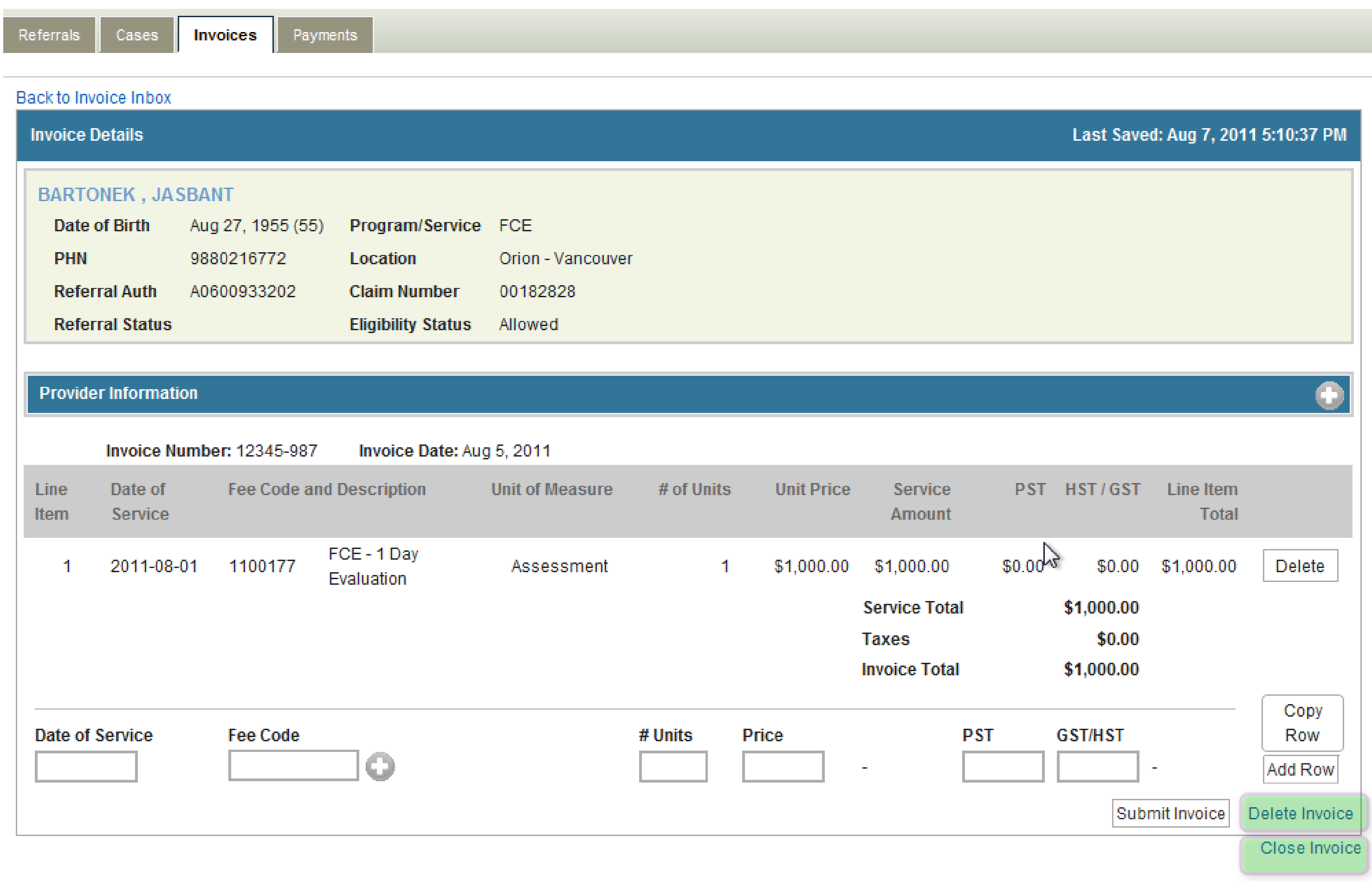
The Close function located in the bottom right side of the Create Invoice Screen allows the user to close the invoice without submitting:

- The closed invoice is a Work In Progress and can be accessed at a later time from the Draft Invoices Work List;

### 3.2.14 Deleting an Invoice that is a Work In Progress

The Delete function located in the bottom right side of the Create Invoice Screen allows the user to delete the invoice without submitting.

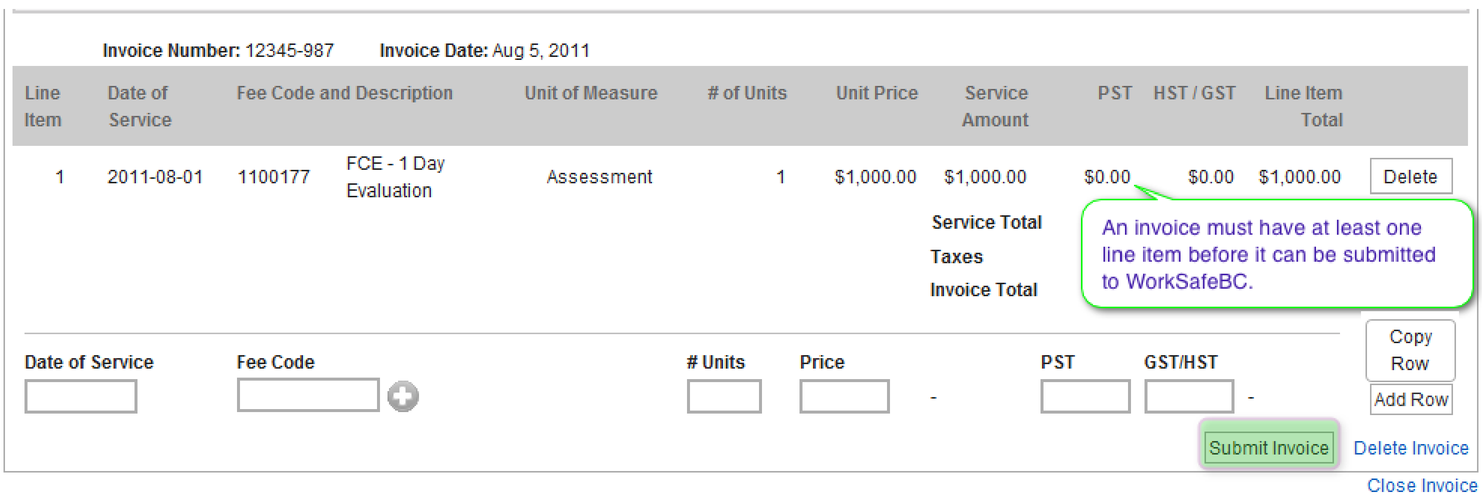
- Only invoices that are a Work In Progress (Draft) can be deleted;
- Once an invoice has been submitted to WorkSafeBC, it cannot be deleted;
- Deleting an invoice will permanently remove the invoice from the portal;
  - There is no undo function for deleting an invoice;

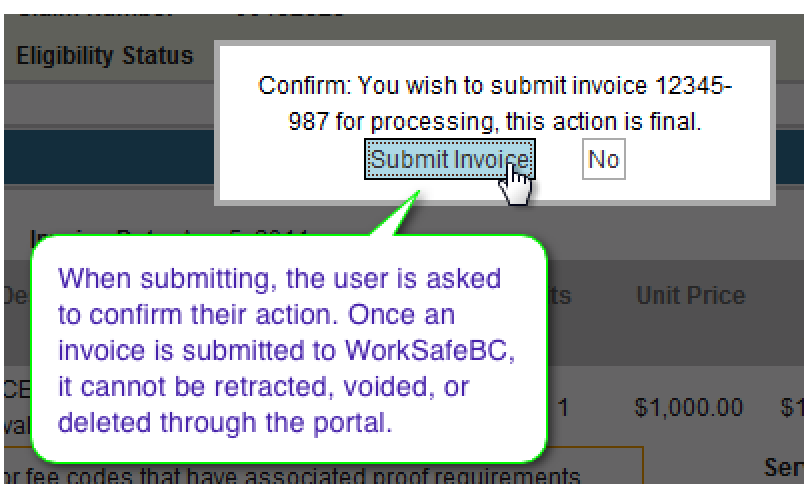


### 3.2.15 Submitting a Completed Invoice

The Submit Invoice function located in the bottom right side of the Create Invoice Screen allows the user to submit the invoice to WorkSafeBC.

- The Submit Invoice function is not visible until at least one line item has been added to the invoice;
- An invoice must have at least one line item in order to be submitted to WorkSafeBC;
- Once an invoice has been submitted to WorkSafeBC, it can no longer be modified. This means:
    - Line items cannot be added to the invoice;
    - Line items cannot be modified or removed from the invoice;
    - The invoice number and invoice date cannot be modified;
    - The invoice cannot be deleted;
    - The invoice cannot be voided or retracted through the portal;



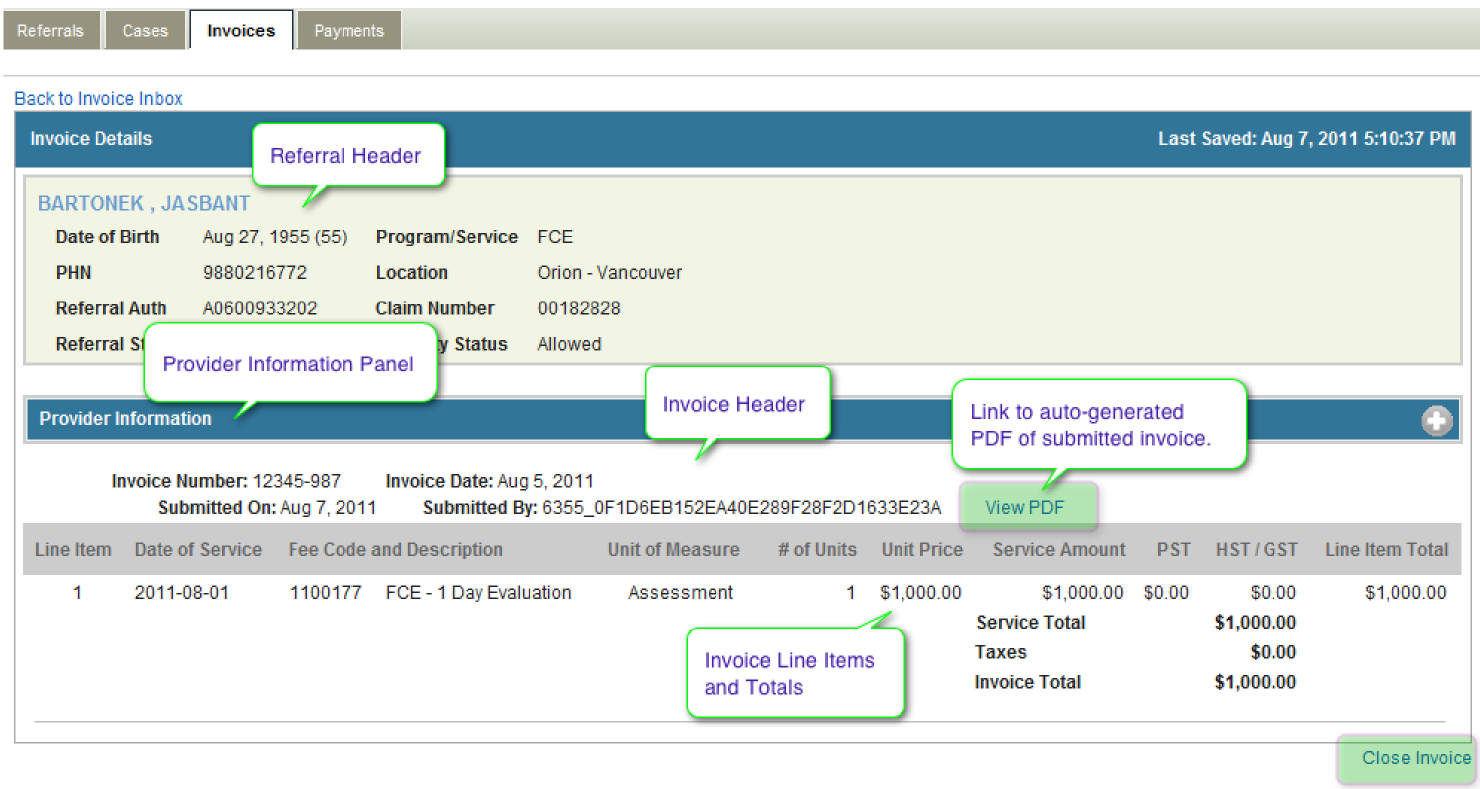
## 3.3 Submitted Invoice Screen

The Submitted Invoice Screen provides the user with confirmation of invoice details submitted to WorkSafeBC. The invoice is displayed with the data as entered by the user, including:

- Referral Header;
- Provider Information Panel;
- Invoice Header, including link to PDF and attachments, if any
- Invoice Line Items;
- Invoice Totals;
- Close Invoice function

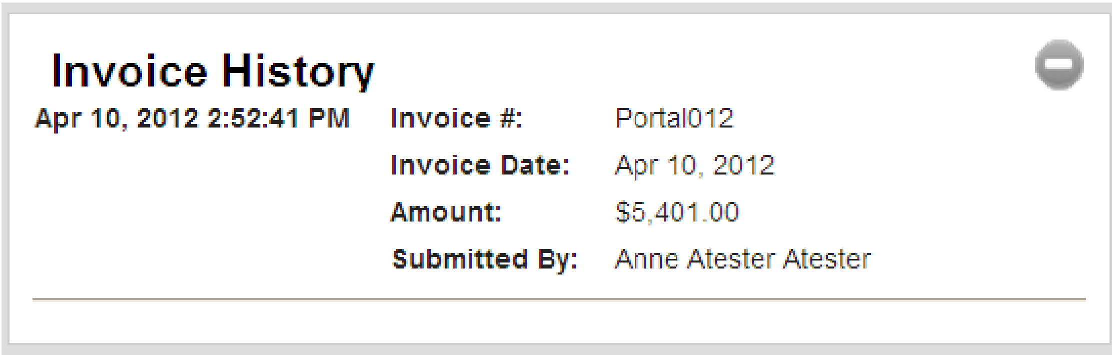
Once the invoice has been submitted, it cannot be revoked, voided, or deleted.

- Submitted invoices cannot be edited; the display is read only.



### 3.3.1 Invoice Submission History

Once the invoice is submitted to WorkSafeBC, the details of the invoice will also be captured in the Invoice History Panel. This panel can be viewed in the Referral or Case details screen.



## 3.4 Invoice PDF

When an invoice is submitted to WorkSafeBC, the portal will generate a PDF version of the submitted invoice. The PDF will display:

- Provider Organization Name and ID
    - As registered in the Central Provider Registry (CPR);
- Clinic Work Location Information as registered in CPR;
- Pay To Details, including Payee Number as registered in CMS
- Contract Number applicable to invoice (based on Invoice Date);
- Worker Demographics;
- Referral and Claim Information;
- Invoice Number and Invoice Date;
- Invoice Line Items and Totals;
- Invoice Comments, if any
- Invoice attachments, if any, will be included

The invoice PDF is formatted to support printing of the invoice using the print functionality of the user's PDF reader.

[illegible]

**Portal INVOICE**

[illegible]

**Pay To Address:**
[illegible]
**Payee #:** [illegible]

**Invoice To:** WorkSafeBC

**Invoice #:** 12345-987
**Invoice Date:** Aug 5, 2011

**Client/Worker:**
**BARTONEK, JASBANT**
**DOB:** Aug 27, 1955
**PHN:** 9880216772

**Program/Service:** FCE
**Contract #:** 15872
**Claim #:** 00182828
**Referral Authorization #:** A0600933202

| Date of Service | Fee Code and Description | Unit of Measure | # of Units | Unit Price | Service Amount | PST | HST GST | Line Item Total |
|---|---|---|---|---|---|---|---|---|
| 2011-08-01 | 1100177 FCE - 1 Day Evaluation | Assessment | 1.00 | $1,000.00 | $1,000.00 | $0.00 | $0.00 | $1,000.00 |

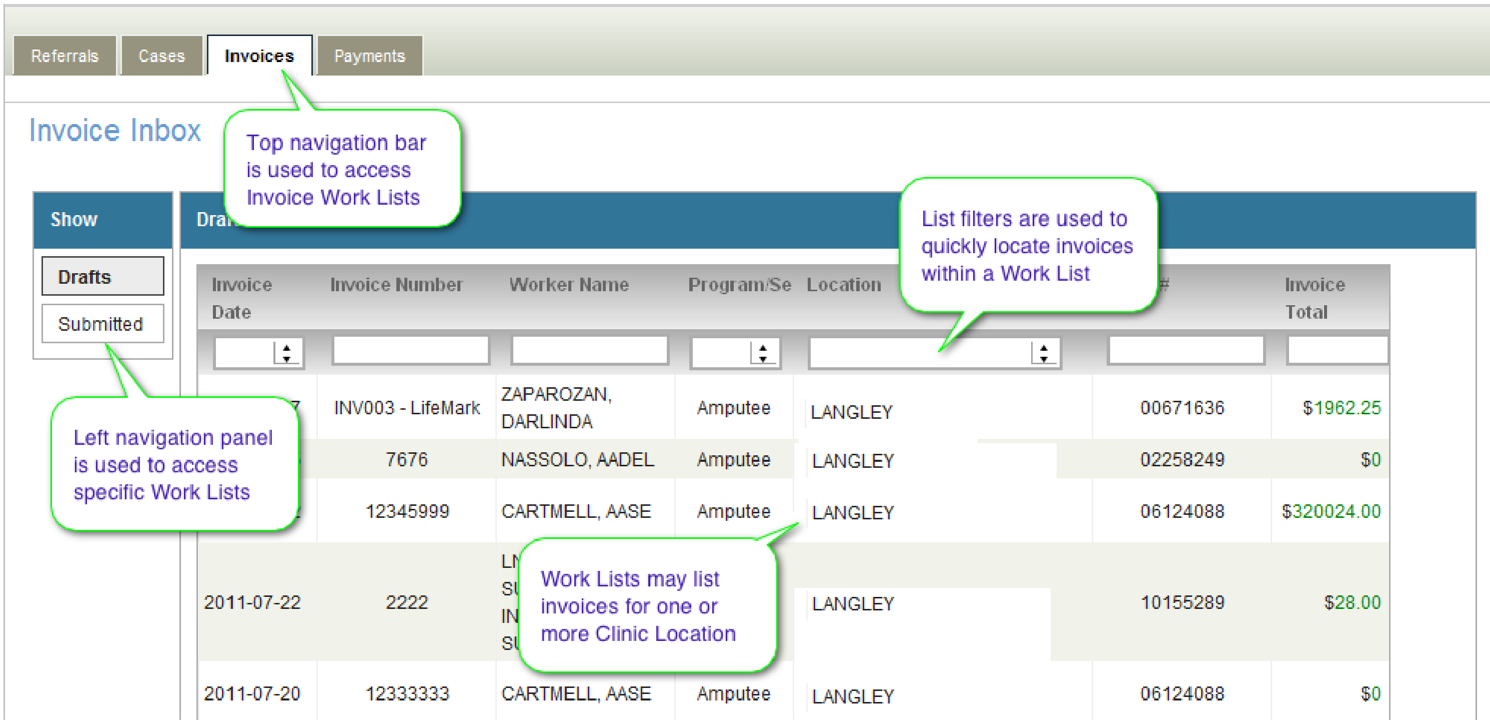
| | |
|---|---|
| Service Total | $1,000.00 |
| Taxes | $0.00 |
| **Invoice To[illegible]** | **$1,000.00** |

### 3.4.1 Invoice Work Lists

Invoice Work Lists can be accessed from the Invoices tab on the portal's top navigation bar. Invoice Work Lists are organized into two different views:

- Draft;
- Submitted;

All Invoice Work Lists support filtering by one or more columns.

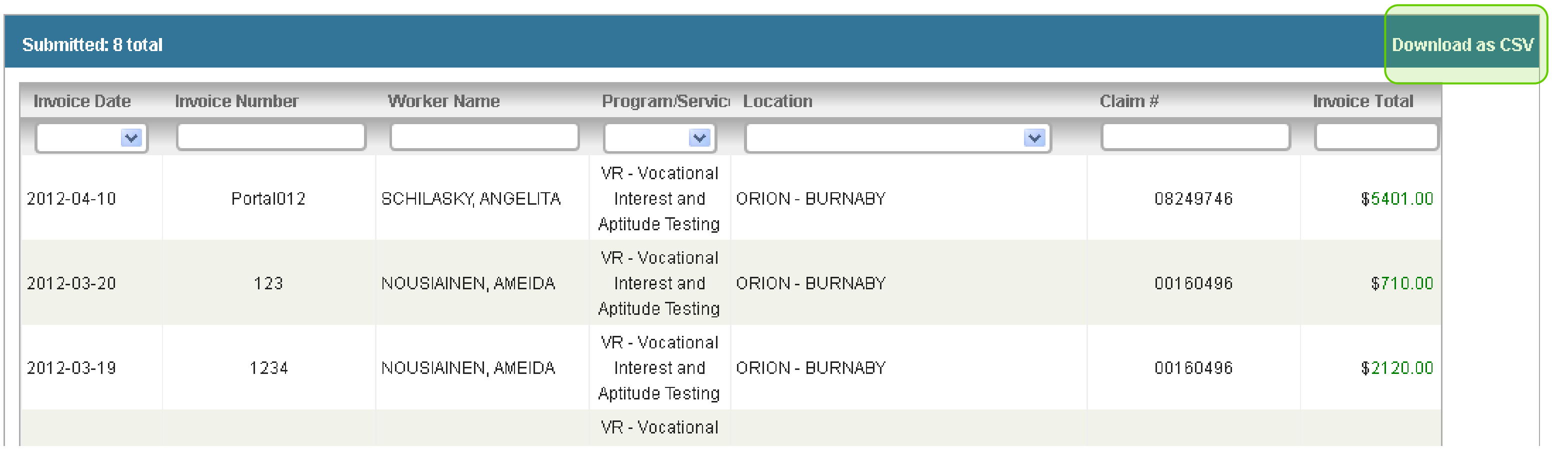



- Draft Invoices Work List
  - Displays a list of all invoices that are a 'work in progress';
  - The invoices in the Draft Invoices Work List have not yet been submitted to WorkSafeBC;
  - The invoices in the Draft Invoices Work List can be modified before they are submitted to WorkSafeBC;
    - Invoices in the Draft Work List can also be deleted.
  - Sort order of this list is determined by the Invoice Date that was entered on the invoice;
    - Draft invoices with the most recent Invoice Date appear at the top of the list;
- Submitted Invoices Work List
  - Displays a list of all invoices that have been submitted through the portal;
  - Displays an overview of invoice information as it was submitted;

- The invoices in the Submitted Invoices Work List cannot be modified or deleted;
- Displays the most recently submitted invoices at the top of the list;

#### *3.4.1.1 Exporting Invoice Work Lists*

Export the Invoice Work List using the “Download as CSV” function, found at the top right hand corner of the grid.



Submitted: 8 total — Download as CSV

| Invoice Date | Invoice Number | Worker Name | Program/Servic | Location | Claim # | Invoice Total |
|---|---|---|---|---|---|---|
| 2012-04-10 | Portal012 | SCHILASKY, ANGELITA | VR - Vocational Interest and Aptitude Testing | ORION - BURNABY | 08249746 | $5401.00 |
| 2012-03-20 | 123 | NOUSIAINEN, AMEIDA | VR - Vocational Interest and Aptitude Testing | ORION - BURNABY | 00160496 | $710.00 |
| 2012-03-19 | 1234 | NOUSIAINEN, AMEIDA | VR - Vocational Interest and Aptitude Testing | ORION - BURNABY | 00160496 | $2120.00 |
| | | | VR - Vocational | | | |

Both Drafts and Submitted Work Lists can be exported. Only information seen in the Work List will be exported.

# 4 Usability Suggestions – Factors & Considerations

From a usability perspective, we list a number of considerations below.

1. Prepare for invoicing:
   - Familiarity with contract and fee codes that are applicable;
   - Entering the correct invoice date;
   - Knowing service dates in advance of line entry;
   - Billing is in the context of a single contract only:
     - Invoice Date determines which contract is used on the invoice;
       - If Services Dates transition more than one contract, users must create a separate invoice for each contract that is in effect;
     - Service Date determines which fee codes, and amounts are used for each line item entry on the invoice;
   - Providers must be aware of contract changes and end dates;

2. Stage 1 limitations:
   - No functionality available to copy or duplicate a line item;
   - No functionality available to copy or duplicate an invoice;
   - No functionality to support invoicing of identical line items across multiple service dates, without entering each line item separately;
   - Invoicing outside the context of a Referral received through the portal is not supported in Stage 1;

3. Invoicing Practices and Associated Rules:
   - A Provider may only invoice within the context of a portal delivered Referral:
     - They cannot invoice for a Worker they do not have a Referral for in the portal;
     - They cannot create an invoice that is not associated to a specific Referral;

  - The command to create an invoice is only available from the Referral Details screen;
  - The invoice that is generated will be in the context of the Referral the command was executed from;
  - They cannot invoice until they have accepted the Referral
    - Referral status = ACCEPTED;
- The Provider may invoice as often as required:
  - Frequency and timing of invoicing is governed by WorkSafeBC policies and practices (i.e. contract) as well as the Provider's own accounting practices;
- The Provider cannot create two invoices in the portal with the same invoice number;
- An invoice may contain any combination of line items:
  - An invoice must include at least one line item before it can be submitted;
  - An invoice may contain any combination of contracted and/or non-contracted fee codes;
  - An invoice may be comprised entirely of contracted fee codes;
    - The majority of invoices submitted through the portal will contain only contracted fee codes;
  - An invoice may be comprised entirely of non-contracted fee codes;
- An invoice must be in the context of a single effective contract:
  - Invoice Date;
    - Determines the contract that is in effect for the invoice;
    - Invoice date must be equal to or less the current date (date the invoice is created);
    - Invoices cannot be post-dated;
    - Invoice Date must be within the effective date window of the contract;
  - Service Date;
    - Determines the Fee Code Schedule in effect for the invoice line item;
    - Service Date must be equal to or less than the Invoice Date;

        - Example, a Provider is billing monthly on July 10th for services provided during the month of June:
            - Invoice date = June 30th;
            - Service dates = June 1 to 30th (as example);
        - Service dates must be within the contract effective date window (current contract) and must be within one Fee Schedule effective date range (for the contract);
    - Prepare multiple invoices where service dates span more than one contract;
        - Provider cannot bill across two contract effective dates;
- Program contracts and associated fee schedules contain the following information:
    - Allowable programs and/or services:
        - Service groups and services;
        - The contract may have more services on in, in addition to the Service Group;
            - Additional services such as travel;
    - Contract window – effective start and end dates;
    - Approved / contracted Provider locations;
        - Effective start and end dates associated to each Provider location;
    - Fee schedules for each Provider location;
        - Effective start and end dates for each fee code schedule;
        - Only one fee scheduled can be in effect at a time for each Provider location;
            - Fee Schedule effective dates cannot overlap;
        - Each service will have a fee;
        - Each fee has a minimum and maximum amount, these would be the same amount if it is a fixed price;
        - All fees are associated to a fee schedule;
    - Note – the Provider may not be able to do all of the services:
        - Background context is the Claim and the driver is the service entitlement;
        - For services that a provider is not entitled to do, the fee is set to $1 or less (or similar);

- Program contract exceptions:
    - Most contracts will cover all Providers within a single contract for the program, for the province;
        - A program can have more than one contract, for example:
            - A provider might have a different contract for specialized services;
            - There can be an individual / separate CMS contracts to facilitate the referral requirements and associated services;

# 5 Organizing Your Work

## 5.1 Program and contract based invoicing

- Alignment of the invoice to the program contract, including an active clinic location;
- Alignment of the invoicing period to the current effective contract (effective dates) and associated fee schedule;
  - The Provider must know what fee codes they should be using for which services;
  - The Portal will display all available fee codes, not just those applicable to the Provider;
- Prepopulating the invoice header with information from the Referral;
  - The Portal will take care of this, thereby minimizing any potential errors;
- Invoice line items linked to the program contract authorized service;
- Providers may include non-contracted fee codes on their invoice;

# 6 Major Business Processes

## 6.1 Introduction

- Core main line first – happy path;
    - Simple end to end processes;
- Reference life cycle with Clinical Reporting followed by Invoicing;
- Special cases – typical problem and error situations, refer to Sections 4 and 5 above;

## 6.2 Invoicing – Core Main Line (Happy Path)

### 6.2.1 Create Invoice

- Description:
  To create invoice for billing services for a specific case / referral;
- Actions:
    - With Referral Details screen open in browser;
        - Select “Create an Invoice” located on Action Panel;
        - Create Invoice screen displays;
    - Enter Invoice Number and Invoice Date, then Create Invoice;
        - Note contract number in effect under the Provider Information Panel;
- Practices and rules:
    - An invoice must be in the context of a Referral received through the portal;
        - Providers cannot create or submit invoices for Referrals that are not delivered through the portal;
        - Providers cannot create or submit invoices for Referrals that have not yet been accepted through the portal;
    - An invoice must be in the context of a single contract, and may include:
        - Any contracted services under the contract in effect;
        - Any non-contracted fee codes (if applicable);

- Contract selection for invoicing:
  - A contract is selected based on the Invoice Date;
  - A contract with the most recent effective date is selected if there are multiple active contracts on the Invoice Date;
    - This should not happen;
- An invoice cannot be created with a future Invoice Date
  - Post-dated invoices cannot be created in the portal;
- Once the invoice has been created, Invoice Number and Invoice Date cannot be modified;
- Providers may invoice as often as required:
  - Governed by WorkSafeBC policies and procedures (i.e. contract) as well as the Provider's own accounting practices;

### 6.2.2 Add Invoice Line Item

- Description:
  To add an invoicing line item for billing a specific service delivery;
- Actions:
  - Start a new invoice line item by entering Date of Service;
    - Date of Service must be entered first in order for the portal to load the correct Fee Code Schedule;
    - If the Date of Service is changed, clear all fields and re-enter the fee code once the Fee Code Schedule has re-loaded for the line item;
  - Search and select service fee codes for a specific service delivery;
  - Edit line item units & price and associated taxes if applicable;
  - Click “Add” button to include the invoice line item to the invoice;
    - Adding an invoice line item auto-saves the invoice;
- Practices and rules:
  - The fee schedule amount of a fee code for a contracted service is based on the input date of service;
  - Unit price for contracted services:
    - Line item unit price cannot be modified if the maximum amount and the minimum amount of a fee schedule are the same;

        - Line item unit price can only be within the range of the maximum amount and the minimum amount of a fee schedule;
    - Unit price for non-contracted services is entered by the Provider;
        - Provider must know the correct amount that can be billed based on WorkSafeBC practices and procedures and/or what is stipulated in their contract;

### 6.2.3 Submit Invoice

- Description:
  To submit a completed and approved invoice to WorkSafeBC;
- Actions:
    - Submit the invoice with confirmation via the "Submit Invoice" button;
    - View Submitted Invoice Screen;
        - View auto-generated PDF of invoice, print if required;
    - Track submission of the invoice via the Invoice History Panel
- Practices and rules:
    - An empty invoice (i.e. without any line item) cannot be submitted;

### 6.2.4 Resume working on an Invoice that is a Work in Progress

- Description:
  Continue working on a draft invoice (Work in Progress) that has. not yet been submitted to WorkSafeBC;
    - The Draft Invoices Work List contains all invoices that are a Work in Progress and have not been submitted to WorkSafeBC;
- Actions:
    - Open a draft invoice on the Draft Invoice Work list;
    - Add/Delete invoice line items (continue to work on a draft invoice);
    - Close the draft invoice if more invoicing tasks have to be deferred;
- Practices and rules:
    - Invoices are saved each time a line item is added;
    - Closing an invoice that is a Work in Progress will leave the invoice in the Draft Invoice Work List;

### 6.2.5 Delete Invoice

- Description:
  To delete a draft invoice that is no longer valid or required to be stored;
- Actions:
  - Delete an invoice using the Delete button in the Invoicing screen;
  - Delete an invoice with confirmation
  - Return to Draft Invoice Work List to confirm invoice has been deleted;
- Practices and rules:
  - Once an invoice is deleted with confirmation, the invoice is deleted permanently;
  - There is no undo function for deleting an invoice;

## 6.3 Manage Invoices

### 6.3.1 Invoice Work Lists

Providers can manage their Invoices through the Invoice Work List. It can be accessed from the Invoices tab on the portal's top navigation bar and is organized into two different views:

- Draft;
- Submitted;

All Invoice Work Lists support filtering by one or more columns, and also support exporting of data in the Work List.

- Draft Invoices Work List
  - Displays a list of all invoices that are a 'work in progress';
  - The invoices in the Draft Invoices Work List have not yet been submitted to WorkSafeBC;
  - The invoices in the Draft Invoices Work List can be modified before they are submitted to WorkSafeBC;
    - Invoices in the Draft Work List can also be deleted.
  - Sort order of this list is determined by the Invoice Date that was entered on the invoice;
    - Draft invoices with the most recent Invoice Date appear at the top of the list;
- Submitted Invoices Work List
  - Displays a list of all invoices that have been submitted through the portal;

- Displays an overview of invoice information as it was submitted;
- The invoices in the Submitted Invoices Work List cannot be modified or deleted;
- Displays the most recently submitted invoices at the top of the list;

# 7 Summary of Key Points

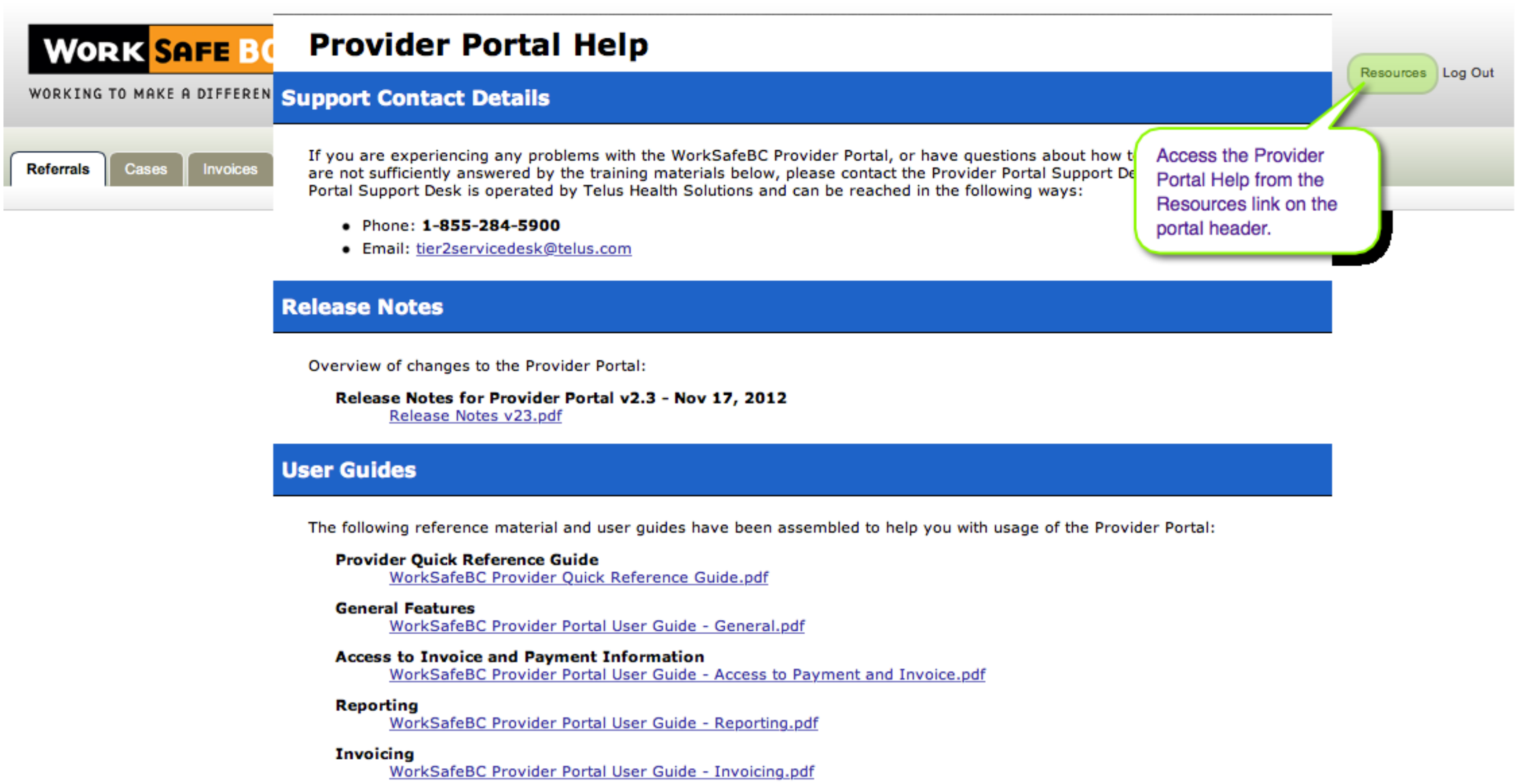
1. As a suggestion, users should summarize the key points in the module (i.e., as a characterization of the business process and functionality that are pertinent to them or their organization's processes) including:
    - Key points and considerations;
    - Practical guidelines;

2. As a suggestion, users should consider "Applying what you learned" as follows:
    - **Ask** "what would you now do differently back on the job?"
        - Relate back to their experience discussed as part of the course;
    - **Suggest** recording 3-5 key ideas, success factors or action steps;
    - **Suggest** reviewing the Business Processes and write a short summary of the process and deliverables or key points for themselves;

3. As a  suggestion, users now have expanded their network of contacts (i.e., both within their own organization and externally with other providers) and they should be sure to use them.

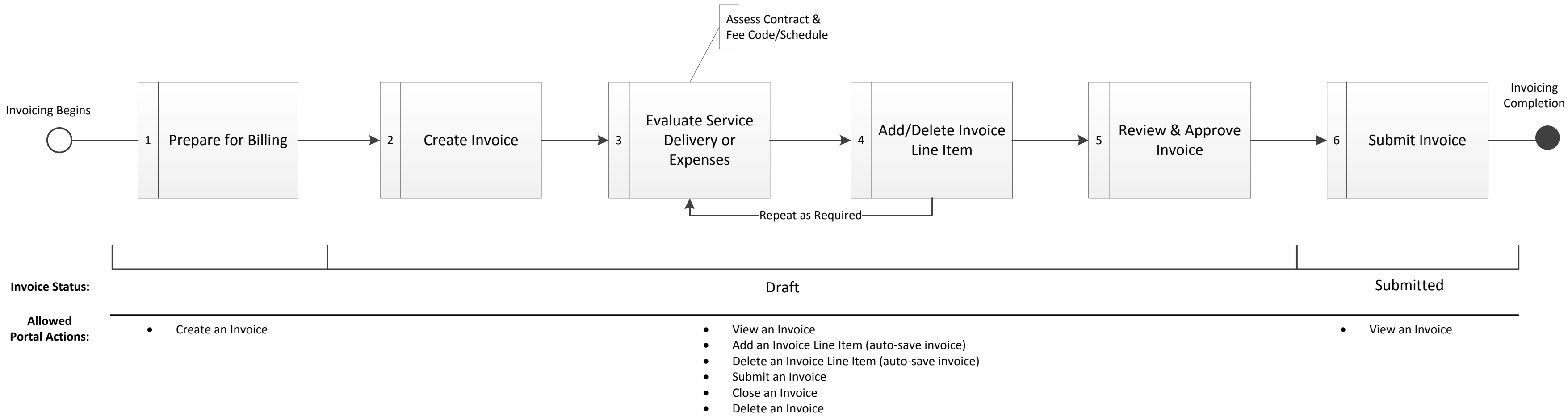
# 8 Resources

The Resources section contains training materials and documents, including this user guide, for easy reference by users.



# Appendix A: Invoicing Life Cycle

**Invoicing (Core Main Line)**



# Appendix B: Summary of Revisions

| Revision | Changes to document |
|---|---|
| **V5.1** | ▪ Addition of 3.3.1 Invoice Submission History<br>▪ Addition of 3.4.1.1 Exporting Invoice Work Lists<br>▪ Addition of Section 8 Resources |
| **V5.2** | ▪ Expand Section 3 to included new screenshots<br>▪ Describe Invoicing Comments, Tax Validation, Copy Row, Invoice Attachments, and Fee-code specific proof requirements |