



Version 2.0

*Department of Economic Security*

*Subject: User Guide*

Arizona Department of Economic Security  
Arizona Early Intervention Program (AzEIP)



**I-TEAMS User Manual**

**Version 2.0**



**DEPARTMENT OF ECONOMIC SECURITY**  
*Your Partner For A Stronger Arizona*



Version 2.0

**Department of Economic Security**

**Subject: User Guide**

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## **1. Introduction:**

I-TEAMS (*Infant-Toddler Electronic Administration and Monitoring System*) is a web-based application which allows DES/AzEIP as well as its contractors and partner agencies, including the Arizona State Schools for the Deaf and the Blind (*ASDB*), the DES/Division of Developmental Disabilities (*DDD*), Raising Special Kids (*RSK*), and Northern Arizona University/Institute for Human Development (*AzEIP TAMS*) to record and view information in an easy and efficient manner.

### **1.1. Information Recorded and Accessed in I-TEAMS**

- a. Organization and Contract related information
  1. Add personnel to I-TEAMS
  2. Assign personnel to contract regions and to roles; remove or change personnel as needed
  3. Record Professional Provider's information in Professional Registry
  4. Create and submit invoices to DES/AzEIP based on services provided under contracts (Billing)
  5. Create/Manage Banner messages for their Team members and Personnel
- b. Child related information:
  1. Enter/View Referral Information for a child
  2. Record/View Child Demographics information
  3. Record/View Insurance Information for a child
  4. Enter/View Eligibility decision and reason
  5. Create and update IFSPs for a child
  6. Enter/View Contractor for a child
  7. Enter/View Service Coordinator for a child
  8. Assign and Change Team members for a child
  9. Enter/View Service Delivery information
  10. Enter/View Transfer, Transition and Exit information for a child
  11. Enter/View Child Entry/Exit Indicator Summary information

### **1.2. User Roles and Access to I-TEAMS**

Access to I-TEAMS is determined by the roles assigned to the employee, including contractors and their subcontractors. Roles may be assigned by the DES/AzEIP Contract Admin, Contract Admin, DDD Admin and ASDB Admin. There are three levels of access:

- a. Read access- able to view, but not enter or edit, information
- b. Write Access- able to enter and edit information
- c. Read and Write Access- able to read, enter and edit



## 2. Service Delivery:

Using the Service Delivery page, the user can enter all services that were provided to the child. The Service Delivery page can be accessed through the “Child Demographics” page in a record.

- **Note:** *Service deliveries have to be entered in I-TEAMS. Each person who has a write access to Service Delivery can enter service delivery information for a child that is assigned to them.*



### Actors Access Table:

Actor #	Actor Name	Access
1	Referral	--
2	Service Coordinator	<b>Write</b>
3	DDD Service Coordinator	--
4	ASDB Service Coordinator	--
5	Professional Provider	<b>Write</b>
6	DES AzEIP App Admin	<b>Write</b>
7	Contract Admin	<b>Write</b>
8	Supervisor	<b>Write</b>
9	DDD Admin	R-if DDD
10	ASDB Admin	R-if ASDB
11	Finance	<b>Write</b>
12	Data Entry Expanded	<b>Write</b>
13	Monitor & TA Contactor	Read
14	DDD Finance	R-if DDD
15	ASDB Finance	R-if ASDB



## 2.1. Screen Display of Service Delivery:

Service Delivery

ITEAMS ID: 29  
 Child: Madison, James DOB: 4/17/2012 Status: Open as of 9/25/2013  
 Agency: AZEIP Contract Region: RISE East Central Maricopa

AZEIP 45th day from Referral Date:  
 Sunday, March 31, 2013

[Back to Child Demographics](#)

**Service Delivery**

Date: 09/25/2013

Service:  [Enter Team Conferencing](#)

Team Member:

Modifier(s)

Assessment  Meeting  Non-Direct  Service Coordination (Dual role)

Assistive Technology  Multiple eligible children 2  Record Review  Sign Language and Cued Language

Data  Multiple eligible children 3  Report Writing  Team Lead

Evaluation

Units:   Setting:  Location (Zip):

Reversal? Yes  No

Is TPL Reimbursable: Yes  No

Service Delivery Notes:

## 2.2. Date:

System defaults and displays the current date which can be changed using calendar icon or text box.

## 2.3. Service:

Select the service that was provided by the team member selected using drop down list.

## 2.4. Team Member:

Select team member name that has provided the services using drop down list. This field has provider name along with discipline type. This information is only available if the team member has been added to the Assign/Change Team member page.

## 2.5. Modifier(s):

Users should select the modifier(s) depending on the service selected

**Modifier(s)**

Assessment  Meeting  Non-Direct  Service Coordination (Dual role)

Assistive Technology  Multiple eligible children 2  Record Review  Sign Language and Cued Language

Data  Multiple eligible children 3  Report Writing  Team Lead

Evaluation



**2.6.List of modifier(s) that can be used with each discipline**

Modifier	Discipline(s) that can use this modifier
Multiple eligible Children 2 Multiple eligible children 3	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
	Social Worker
	Vision Specialist
	Hearing Specialist
Team Lead	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
	Social Worker
	Vision Specialist
	Hearing Specialist
Team Conferencing	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
	Social Worker
	Service Coordinator
	Vision Specialist
	Hearing Specialist
Non-Direct  Note: When a service marked with * is selected and Non-Direct is selected as a modifier than Non-Direct needs to be selected with either Team Lead or Service Coordination (Dual Role) modifier.	Occupational Therapist *
	Physical Therapist *
	Speech-Language Pathologist *
	Developmental Special Instruction *
	Psychologist *
	Social Worker *
	Service Coordinator
	Vision Specialist *
	Hearing Specialist *
Record Review	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
	Social Worker
	Vision Specialist



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Modifier	Discipline(s) that can use this modifier
Meeting	Hearing Specialist
	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
	Social Worker
	Service Coordinator
	Vision Specialist
Data	Hearing Specialist
	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
	Social Worker
	Service Coordinator
	Vision Specialist
Report Writing	Hearing Specialist
	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
Assessment	Social Worker
	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
	Social Worker
	Service Coordinator
	Vision Specialist
Evaluation	Hearing Specialist
	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Psychologist
Assistive Technology	Social Worker
	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Vision Specialist



Modifier	Discipline(s) that can use this modifier
	Hearing Specialist
Sign language and Cued Language	Speech-Language Pathologist
Service Coordination (Dual Role)	Occupational Therapist
	Physical Therapist
	Speech-Language Pathologist
	Developmental Special Instruction
	Vision Specialist
	Hearing Specialist

**2.7.Units:**

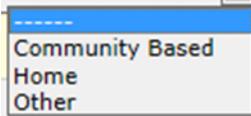
Service Delivery units have to be entered in this dropdown. For example, if a service provider delivered service for 2 hours and 15 minutes, they would select 2 in the first drop down and .25 in the next one.

- **Note:** 15 minutes = .25 units for service delivery. No more than 8 units can be recorded for a day for service delivery.
- **Note:** Units drop down list will be populated based on the modifiers and services.
- **Note:** Service Coordinator non-direct units are billed for every 0.25 units the service coordinator actually worked.
- **Note:** Here are few rules that might be helpful when selecting the modifier:
  - Cannot select multiple eligible children 2 and multiple eligible children 3 together.
  - Cannot select any other modifier with Report writing, Record Review or Evaluation.
  - Data can be selected alone or can be selected with Service Coordination (Dual Role).



### 2.8.Setting:

Using drop down list select the setting that apply.



### 2.9.Location (Zip):

Enter the zip code using text box where the service was provided.

- **Note:** In case of an Address Confidentiality Program (ACP) child, this field will be a drop down, and one of the ACP Zip codes will have to be selected for Service Delivery.
- **Note:** Services will get listed as non-billable if the zip code of the service provided is not a zip code listed in that child's contract region

### 2.10. Is TPL Reimbursable: *When the insurance will pay for services*

- Occupational Therapist (OT)
- Physical Therapist (PT)
- Speech-Language Pathologist (SLP)
- Developmental Special Instructionist (DSI)
- Service Coordinator (SC)
- Psychologist (PSYCH)
- Social Worker (SW)

If the service *is* TPL reimbursable, user has to select, "Yes". If not, then "No" should be selected.

**Note:** You cannot delete anything from ITeams; use the reversal option to correct a service.

### 2.1.Reversal:

If user enters the wrong service, select Yes for reversal; otherwise it defaults to a No. A reversal of service will be shown as a negative and red color font in the service delivery information



below. This reversal will show as a negative in the invoice, and the user will see it in the next invoice generated.

**Service Delivery**

[Back to Child Demographics](#)

Team Member:  [Enter Team Conferencing](#)

Date: 06/11/2013  Service: -----

Modifier(s)

Assessment  Meeting  Non-Direct  Service Coordination (Dual role)

Assistive Technology  Multiple eligible children 2  Record Review  Sign Language and Cued Language

Data  Multiple eligible children 3  Report Writing  Team Lead

Evaluation

Units:  Location (Zip):  Setting: -----  Is TPL Reimbursable: Yes  No

Reversal? Yes  No

Service Delivery Notes:

<a href="#">Edit</a>	4/1/2013	Physical Therapist Physical Therapist Isaac Newton	Physical Therapy	Assessment	Units: <b>-0.25</b>	Not IFSP	Location: 850271234	Setting: Community Based	TPL Reimbursable: No
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**2.2. Service Delivery Notes:**

User may enter notes about the particular service that was entered using text box.

**2.3. Save:**

User must select “Save” button if the user wants to save this service delivery information.

**2.4. Number of Records to View**

Once Service Delivery information has been saved, it will move down to the service delivery grid (*below the Service Delivery Notes*), where the service deliveries can be seen. The user has



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the option to list the service deliveries by *25, 50, 100 and All*

Number Of Records to View: 25

Date	Provider	Service	Service Modifier(s)	Units:	Not IFSP	Location:	Setting:	TPL
<a href="#">Edit</a> 9/10/2013	DSI Service Coordinator [Redacted]	Service Coordination Services	Non-Direct	0.50	Not IFSP	85209	Other	TPL Reimbursable: No
<a href="#">Edit</a> 9/9/2013	DSI Service Coordinator [Redacted]	Service Coordination Services	Assessment	0.50	Not IFSP	85209	Home	TPL Reimbursable: No
<a href="#">Edit</a> 9/9/2013	DSI Service Coordinator [Redacted]	Service Coordination Services	Meeting Service Coordination (Dual role)	0	Not IFSP	85209	Home	TPL Reimbursable: No
<a href="#">Edit</a> 9/9/2013	Agency Director/Owner; Supervisor; SLP; SC	Speech and Language Pathology Services	Assessment		Not IFSP		Home	TPL

### 2.5.Edit

The user may edit the service information by selecting edit link next to the particular service delivery. It will automatically populate at the top where Service delivery information was entered earlier, and user can edit and save as desired. The user will not be allowed to delete a service.

Number Of Records to View: All

Date	Provider	Service	Service Modifier(s)	Units:	Not IFSP	Location:	Setting:	TPL
<a href="#">Edit</a> 9/25/2013	Audiologist Audiology Services	Audiology Services		1.00	Not IFSP	85349	Home	TPL Reimbursable: No
Invoiced 1/8/2013	Conv Pseudo Employee Developmental Special Instruction EasterSealsBlake PimaSW	Special Instruction	Clinic (Other setting) Clinic (Other setting) Master's Degree (OR HIGHER) Team conferencing	0.25	Not IFSP	85051	Other	TPL Reimbursable: No

### 2.6.Date:

It displays the date when the service was delivered.

### 2.7.Provider:

Date	Provider	Service	Service Modifier(s)	Units:	Not IFSP	Location:	Setting:	TPL
9/10/2013	DSI Service Coordinator [Redacted]	Service Coordination Services	Non-Direct	0.50	Not IFSP	85209	Other	TPL Reimbursable: No

In the provider section it displays three fields.

- i **DSI:** This is the Job Title that was given to the employee when entering him/her to I-TEAMS.
- ii **Service Coordinator (in second row):** This field will display the discipline of the Professional Provider.
- iii **(Normally a team members name will be here but is blacked out for training purposes):** This field will display the name of professional provider.

### 2.8.Service:



This column will display the service that was provided.

**2.9. Service Modifiers:**

If any of the service modifiers are selected while entering Service Delivery information, they will be displayed here. (E.g., *Assessment*.)

**2.10. Units:**

The number of “Units” of service that was provided will be displayed in this field.

**2.11. Remaining:**

Next column where it says, “*Non IFSP*”, basically states whether or not the service is an authorized IFSP service. If it is, it should show the ‘*Remaining Units*’ authorized in the field. Otherwise, it will show “*Non IFSP*”.

**2.12. Location:**

This field displays the zip code where the service was delivered.

**2.13. Setting:** The setting the service was provided will be displayed here. E.g., *Home, Community Based, or Other*.

**2.14. TPL Reimbursable:**

If the user selected, “*Yes*” while entering Service Delivery information, it will show a “*Yes*” here; otherwise, it will show a “*No*”. Refer to [#TPLExplanation](#) (clickable when accessing document from a computer) or go to 2.10 under Service Delivery.

**2.15. Pending:**

If the service has been entered and the user has created a draft invoice for it, it will show the services as “*Pending*”.



Pending	4/1	2013	Physical Therapist	Physical Therapy	Units:	Remaining:	Location:	Setting: Home	TPL Reimbursable:
			Physical Therapist		1.00	364.00	85027		No
			Isaac Newton						



**2.16. Invoiced:**

If the service has been invoiced, the user can no longer edit the service delivery (*as shown in the image*). When the service is approved the service status would be changed to Invoiced.

Invoiced	1/9/2013	Service Coordinator Service Coordinator Peter Griffin	Service Coordination Services	Natural - Home Service Coordination (Dual role)	Units: 2.75	Remaining: 2916.25	Location: 85013	Setting: Home	TPL Reimbursable: No
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### 3. Service Delivery – Team Conferencing:

#### 3.1. Screen Display of Service Delivery:

ITEMS ID: [REDACTED]  
 Child: [REDACTED] DOB: [REDACTED] Status: Open as of [REDACTED]  
 Agency: **AzeIP** Contract Region: **ACT East Pinal& Southern Gila & Southeast Maricopa**

AzEIP 45th day from Referral Date:  
**Sunday, October 06, 2013**

[Back to Child Demographics](#)

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**Service Delivery**

Date: 09/25/2013

Service: [REDACTED] [Enter Team Conferencing](#)

Team Member: [REDACTED]

Modifier(s)

Assessment  Meeting  Non-Direct  Service Coordination (Dual role)  
 Assistive Technology  Multiple eligible children 2  Record Review  Sign Language and Cued Language  
 Data  Multiple eligible children 3  Report Writing  Team Lead  
 Evaluation

Units: 0 [REDACTED] .00 [REDACTED] Setting: [REDACTED] Location (Zip): [REDACTED] Is TPL Reimbursable:  
 Reversal? Yes  No  Yes  No

Service Delivery Notes:  
 [REDACTED]

[Save](#) [Cancel](#)

#### 3.2. Enter Team Conferencing:

Select the Enter Team Conferencing Link. This link will navigate the user to the Team conferencing page where the user can enter the Team Conferencing Units.

**Service Delivery Team Conferencing**

ITEMS ID: [REDACTED]  
 Child: [REDACTED] DOB: [REDACTED] Status: Open as of [REDACTED]  
 Agency: **AzeIP** Contract Region: **ACT East Pinal& Southern Gila & Southeast Maricopa**

AzEIP 45th day from Referral Date:  
**Sunday, October 06, 2013**

[Back to Service Delivery](#)

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**Team Conferencing**

Date: 09/25/2013

Developmental Special Instruction [REDACTED] Available Units: 0.75  
 Service Coordinator [REDACTED] Available Units: 0.75  
 Speech-Language Pathologist [REDACTED] Available Units: 0.75

Location (Zip): [REDACTED] Units: .00 [REDACTED]

Service Delivery Notes:  
 [REDACTED]

[Save](#) [Cancel](#)



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Date	Provider	Service	Service Modifier(s)	Units	Not IFSP	Location	Setting	Other	TPL	Reimbursable
<a href="#">Edit</a> 9/25/2013	DSI Developmental Special Instruction	Special Instruction	Team conferencing	0.50	Not IFSP					No
<a href="#">Edit</a> 9/25/2013	DSI Service Coordinator	Service Coordination Services	Team conferencing	0.50	Not IFSP					No
<a href="#">Edit</a> 9/25/2013	DSI Developmental Special Instruction	Special Instruction	Team conferencing	0.25	Not IFSP	85209				No
<a href="#">Edit</a> 9/25/2013	Agency Director/Owner; Supervisor; SLP; SC Speech-Language Pathologist	Speech and Language Pathology Services	Team conferencing	0.25	Not IFSP	85209				No

**3.3. Date**

System defaults and displays the current date which can be changed using calendar icon or text box.

**3.4. Team Members**

Select the Team members who attended the Team Conferencing. All the Team Members selected on the Assign/Change Team Members page will be displayed on the Team Conferencing page as well. Please make sure that all the Team Members involved in the Team Conferencing are added on the Assign/Change Team Members page as well.

**3.5.Units:**

Team Conferencing units needs to be entered a Units Drop Down. A user can select a maximum of 0.75 units per quarter.

**3.6.Location (Zip):**

Enter the location zip code where the team conferencing took place.

**3.7. Service Deliver Notes:**

User can enter any notes about team conferencing event in the text box.

**3.8. Save and Cancel**

Clicking on Cancel would cancel the data entered on the Team Conferencing page. Clicking on Save would save the team conferencing data for the users on the service delivery page grid.

**3.9. Back to Service Delivery**

Clicking on this button will navigate the user to the Service Delivery page for that child. Please make sure to save the data before navigating to the Service Delivery page. All unsaved changes will be lost if user clicks on this button without saving any data on the Team Conferencing page.



## 4. Create Invoice:

Users will have the option to build a draft invoice, save the draft invoice, and prepare a final invoice. All of the invoices will be created by each contracted region based on their service delivery. The users will navigate to the Invoice screen by clicking on the “*Create Invoice*” from the left-hand menu.

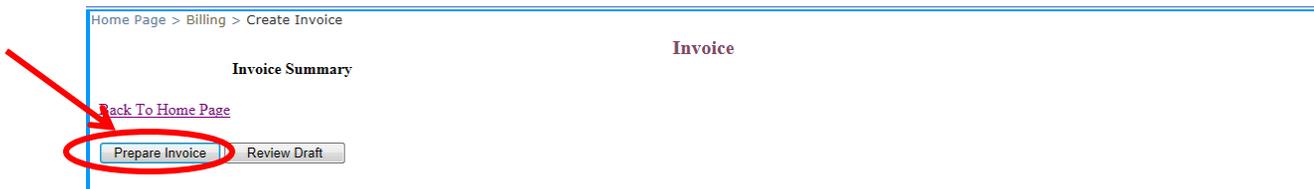


- **Note:** A user can make only one draft for a particular time period.

### Actors Access Table:

Actor #	Actor Name	Access
1	Referral	--
2	Service Coordinator	--
3	DDD Service Coordinator	--
4	ASDB Service Coordinator	--
5	Professional Provider	--
6	DES AzEIP App Admin	<b>Write</b>
7	Contract Admin	<b>Write</b>
8	Supervisor	<b>Write</b>
9	DDD Admin	--
10	ASDB Admin	--
11	Finance	<b>Write</b>
12	Data Entry Expanded	<b>Write</b>
13	Monitor & TA Contactor	--

### 4.1. Screen Display of Prepare Invoice Page





## A. Prepare Invoice:

Using the “*Prepare Invoice*” button, a user can search for all services within a specific time frame, remove or add services, and prepare an invoice and save it as a draft.

Home Page > Billing > Create Invoice

Invoice

Invoice Summary

[Back To Home Page](#)

Prepare Invoice Review Draft

Date: 3/29/2013

Contract: --Select--

Service Start Date: / /

Service End Date: / /

Get Services

### 4.2.Date:

The date is a non-editable field and will default to the current date.

### 4.3.Contract:

This is a drop-down field. The contract values will be populated in the drop-down based on the service delivery selected. A contract field is **required**. Once the user selects the contract, the “*Get Services*” will appear.

### 4.4.Service Start Date:

A user can enter service start date using text box or calendar icon.

**Note:**

- *Invoices must be submitted in separate months; cannot combine multiple months in an invoice*
- *Dates must start on the first of the month*

### 4.5.Service End Date:

A user can enter service end date using text box or calendar icon.



**4.6. Get Services:**

Select Get services button to get the list of all the services within that time frame.

- **Note:** Once this button is selected, it changes to ‘View Non-Billable’. User can select all the services that are not billable. If there is no non-billable service under the contract, the grid will be empty. To make these services billable the user will need to go to the service delivery page for that service and change it to a service that is billable

Home Page > Billing > Create Invoice

**Invoice**

**Invoice Summary**

[Back To Home Page](#)

---

Date: 09/19/2013  
 Contract: UCP of Central AZ Northeast Maricopa  
 Service Start Date: 09/01/2013  
 Service End Date: 09/30/2013

Billable Total: \$893.28  
 AzEIP TPL Total: \$566.16  
 Reversals: \$0.00

Service Date	Client ID	Child Name	Child DOB	Tier	Bill Family	IsIFSP	IFSP Date	Zip Code	Professional Provider	Service Location	Discipline	Service Units	Rate	Amount	Qualification	Modifiers
<a href="#">Remove</a>	9/18/2013	57409	Hensiek, Micah	3/1/2011	Base	True	7/25/2013	85022	Saxton, Clint	Home	Speech-Language Pathologist	2.00	\$80.88	\$161.76	Master	AS

**4.7. Remove:**

**4.8. Non-Billable Services** (Services that are not being paid for by AzEIP)

**Note:** Scenarios when a service would be listed under the Non-Billable section of Invoice.

- Service not entered on the IFSP
- Service Location (Zip Code) does not fall under the Child’s zip code region
  - ❖ Under this scenario please enter the child’s zip code as the location when entering Service Delivery or Team Conferencing
- Service is a non-Billable Service

Clicking on “Remove” will just remove the service(s) from the invoice. And these removed service will not be included in the draft invoice will be displayed on the Prepare Invoice screen only and will be editable by the user from the service delivery page.

- **Note:** It will change the link to “Add”. The user can simply add that service back to invoice. Once the “Remove” link is selected, the service will show “Edit” link so the user can make any changes needed.



#### 4.9. Save draft:

Clicking in the “*Save Draft*” link will save the all services under one invoice and will remove these services from the “*Prepare Invoice*” tab and move them under the “*Review Draft*” tab.

- **Note:** *If a draft is saved for the time period, and user tries to add another draft invoice. System will prompt that there is already a draft saved and that would have to be deleted before another draft can be saved.*

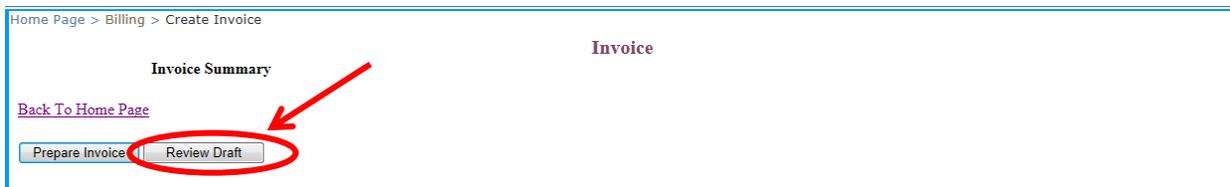
#### 4.10. Steps to Prepare an Invoice:

- Click on **Prepare Invoice**
- Date is defaulted to the current date
- Select **Contract** from the drop down \*
- Select **Service Start date**
- Select **Service End date**
- Click on the **Get Service** button
- Remove the services that the user does NOT want to be submitted as a part of invoice. *(This would be an optional step)*
- Click on **Save Draft**

#### B. Review Draft:

Using review draft button, a user can retrieve all draft versions of invoices, discard or submit as a final invoice.

#### 4.11. Screen display of Review Draft Page:





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Home Page > Billing > Create Invoice

**Invoice**  
**Invoice Summary**

[Back To Home Page](#)

Review Draft  
 Select Contract: --Select--  
 Invoice Number: --Select--

Home Page > Billing > Create Invoice

**Invoice**  
**Invoice Summary**

[Back To Home Page](#)

Review Draft  
 Select Contract: UCP of Central AZ 1e Maricopa NW   
 Invoice Number: --Select--

Home Page > Billing > Create Invoice

**Invoice**  
**Invoice Summary**

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Review Draft  
 Select Contract: Child & Family Resources West Central Maricopa   
 Invoice Number: 1007

Service Date	Client ID	Child Name	Child DOB	Tier	Bill Family	IsIFSP	Zip Code	Professional Provider	Service Location	Discipline	Service Units	Rate	Amount	Qualification	Modifiers
5/22/2013	51166	Smith, Cathy	2/3/2011	BASE		False	85303	Laura Hopkins	Home	Speech-Language Pathologist	1.00	\$80.88	\$80.88	Master	
5/7/2013	41098	Smith, Cathy	11/29/2010	BASE		False	85345	Laura Hopkins	Home	Speech-Language Pathologist	1.00	\$80.88	\$80.88	Master	

**4.12. Select Contract:**

It is a drop down field and is a required field. The contract values will be populated in the drop down based on the service delivery selected. Once the user selects the *Contract "Retrieve Draft"*, the button appears.

**4.13. Invoice Number:**

It is a drop down field. Select one invoice number based on the number of invoices.

**4.14. Submit:**

Select submit button to send invoice as final invoice for approval.

**Note:**



- Be sure that the services are correct before you submit

(You will not be able to edit. You will need to discard and go back to the service delivery page.)

#### 4.15. Discard:

If user selects discard button it removes the invoice from the grid table and changes the status of this invoice from “*Pending*” to “*Edit*”. The invoice appears back on the Prepare Invoice screen and the service is editable again on the Service Delivery page.

#### 4.16. Steps to Review Draft and Submit Invoice:

- Click on the ***Review Draft***.
  - Select ***Contract*** from the drop down.\*
  - Select ***Invoice Number***.
  - Click on ***Retrieve Draft*** button.
  - Click the ***Submit*** button to submit the invoice OR Click the ***Discard*** button to remove the draft invoice if needed. *(This would be an optional step)*
- ***Note:*** *If the invoice is denied by the AzEIP Finance admin it would appear back under the “Prepare Invoice” screen. The user can make the edits as requested by the AzEIP Finance admin, on the service delivery page and then re-submit the invoice again for approval.*