Credit Invoice Approval

Accessing Bill Adjustments for Approval
Primary approvers may access bill adjustment transactions for approval in several ways: through the Worklist, email notification, Approval WorkCenter, or Billing WorkCenter. Alternate approvers may access bill adjustment transactions for approval through the Approval Workcenter or Billing WorkCenter. Credits and rebills may also be opened by navigating to: Billing > Maintain Bills > Standard Billing by both primary and alternate approvers.

Routing for Approval
Credit and rebill invoices are simultaneously routed to the primary approver and to a pool of one or more alternate approvers. If a credit or rebill has multiple DeptIDs in the chartstrings and those DeptIDs have different primary approvers, then the credit or rebill will be routed to each of the primary approvers. Primary approvers also receive an email. An invoice needing approval will remain in the primary approver’s Worklist until it has been approved. In the case that a transaction has not been approved or sent back within five calendar days, the billing specialist will be notified by a system-generated email.

Taking Action on Transactions Needing Approval
The steps below describe the process for approving a Credit/Rebill Adjustment. Note that for a credit/rebill, the credit invoice must be approved first.

1. Open the credit bill in one of the ways described above (Worklist, email, WorkCenter, Billing module).
2. Review any supporting documentation by clicking <Attachment>.
3. Review the Header Notes page for the justification and for consistency with any supporting documents.
4. Click <Approvals> on the Header Info 1 page.
5. From the Approvals window, click <Approval Monitor> to view any comments; close the comments after viewing.
6. In the Approvals window, click <Approve>. If the credit cannot be approved, add comments and click <Send Back>.
7. To open a corresponding rebill, use the method selected for opening the credit (Worklist, email, WorkCenter, Billing module).
8. Review the Header Notes page for the justification.
9. Verify that changes to the rebill are consistent with the justification.
10. Click <Approvals> on the Header Info 1 page.
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Taking Action on Transactions Needing Approval (cont.)

11. From the Approvals window, click <Approval Monitor> to view any comments; close the comments after viewing.

12. In the Approvals window, click <Approve>. If the rebill cannot be approved, add comments and click <Send Back>.

Monitor Status of Related Credits and Rebills

Approvers may ensure that credits and related rebills have been submitted and approved in a timely manner by monitoring the Credit/Rebill Invoices page through the Approval WorkCenter or the Billing WorkCenter. The Related Approval Status column allows the approver to see the status on any credit or rebill. A status of “Initial” indicates a credit or rebill has not been submitted. A status of “Pending” indicates the bill has been submitted and is pending approval.

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Department Requests Credit Adjustment
(1)

Billing Specialist Enters Adjustment in “Ready” Status
(2)

Billing Specialist Submits Bill/Rebill for Approval
(3)

Email is Sent to Approver
(4)

Approver Retrieves Transaction
(5)

Approver Reviews Transaction
(6)

Okay to approve?

NO

Approver Selects “Send Back” Option and Enters Comments
(7)

YES

Approver Approves the Transaction
(7)
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