MINNESOTA JUDICIAL BRANCH

Psychological Services: Examiner Invoicing

This is a quick reference for completing and viewing invoices within the Psychological Services Electronic Invoicing application. For more information, online help is available via the **Help** link within the application.

About Invoices

There are three different types of invoices: Employee, Contract, and Independent. To submit an invoice, follow the applicable steps in this Quick Reference. Some sections are required, while some are optional.

Invoice Type	Description
Employee Invoice	This type of invoice is for examiners that are employees. The employee enters the time spent for each service. This type of invoice collects data rather than describing the method in which the examiner is paid.
Contract Invoice	This type of invoice is for examiners who hold contracts for service with the state or district. The contract examiner enters the time spent for each service. If applicable, an alternate rate is entered as well. This type of invoice describes the way in which the examiner is paid, which is different from an employee invoice.
Independent Invoice	This type of invoice is for examiners who are independent examiners. The independent examiner enters the time spent for each service. If applicable, an alternate rate is entered as well. This type of invoice describes the way in which the examiner is paid, which is different from an employee invoice.

Important: Please create a separate invoice for each county. Invoices may include multiple cases; however, they need to be county specific.

For information on case validation within the invoicing system and entering case information into invoices when the case validation system is off-line, see the Psychological Services Invoicing webpage.

Notes:

- If you do not complete an invoice and exit from the system, to access the incomplete invoice see the instructions within this Quick Reference for Viewing an Invoice. You will see the invoice status as "Incomplete" and will be able to continue adding information to it until it is ready to be submitted.
- You may print your invoice at any time using the Single Invoice Detail Report. Access the **Help** link from any screen in the Psychological Services Electronic Invoicing application and refer to the Viewing/Printing Reports and Invoices online help topic.
- Invoices submitted under a contract will have to be specific to that contract and will not be able to include work done outside of it. Independent contractors may create invoices with multiple cases in multiple counties.
- When entering an invoice, you must verify that the district court case number is the correct case number for which you performed services. You cannot submit an invoice that has an invalid case number.

Entering an Invoice

Step One: Select an Invoice Type

1. From the menu of options, select **Examiner** >> **Invoices**. The Invoice Options appear.
2. Click the **Create Invoice** hyperlink. The Create Invoice screen appears.
3. To create a new invoice, from the Invoice Type drop-down menu, select the applicable invoice type. For more information on each invoice type, see the table in About Invoices.
   - **Contract:** From the drop-down menu, select an option.
   - **Comment:** It is recommended to provide a meaningful reference to the case. For example, this field can be used to indicate the proposed patient's name, county, or date. Provide anything that will be useful for you when viewing your cases list.
4. Click **Create Invoice**. The Invoice Main Page screen appears. The Invoice Header and Examiner Info sections contain information about the invoice that you are creating; however, this information is not editable. It is for review purposes only.

Step Two: Complete the Cases Section (required)

1. In the Cases section, click **Add/Update Cases**. The Case Detail appears.
2. To add new case information, complete the required fields.

Field	Action
Case Number	This is a required field. Type in the case number. **Important:** Using the correct case number is required. Refer to the examples on the screen within the application. You are not required to type the dashes (-); the case number will auto format. For example, if the case number is "01-CR-07-123" you may type "01cr07123" into the field. However, the letters and numbers must be entered exactly as they appear on court documents. Omitting or adding a number, such as the number zero, will invalidate the case number. **For more case number detail, see the Psychological Services Invoicing webpage.**
Case Type	This is a required field. From the drop-down menu, select a case type option. **Important:** If you select a case type that is not in your financial profile, the system displays an error and gray's everything out. To exit the error, on the browser bar, click Back. To add that case type and rate to your profile, you must navigate to your profile and add it, and then return to completing the invoice.
Location	This is a required field. From the drop-down option, select an option.
First Examiner	This is a required field. From the radio buttons, select the applicable option.
Rate	The rate that you have previously indicated in your financial profile is populated in this field.

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Field (cont)	Action/Description (cont)
Rate Type	The rate type that you have previously indicated in your profile is populated in this field. If you are using an alternate rate type, use the Alternate Rate Type and Alternate Rate Reason fields, see below.
Alternate Rate	If you are charging a rate that is different from the rate found within your profile in the system, provide it in this field. For example, an alternate rate would be used on a case type that you normally perform for $200.00, but for some reason (i.e., rate agreed by court) you are going to be charging $300.00. **Important:** If you are using an alternative rate, you must indicate an alternative rate type below.
Alternate Rate Type	If you are using an alternate rate type, from the drop-down option, select an option.
Alternate Rate Reason	If you are using an alternate rate type, type your reason. This is required if an alternate rate is entered.
Comments	If you have any additional comments, type them in this field.
Status	This field is not editable. It displays the status of the case validation.
Valid MNCIS Case Number	This checkbox is not editable. It shows if the case number is valid or not.

3. To save the information, click the **Insert** hyperlink. A case number verification message appears.
   Important: Read the case number verification message and follow the instructions. You must verify that the case number is the correct case number for which you performed services. You cannot submit an invoice that has an invalid case number. **For more details on case numbers, see the Psychological Services Invoicing webpage.**
   Note: After clicking insert, if you receive a message that the case number is not valid, and you exit and verify that the case number is indeed correct, follow the steps for editing the case details in if the case number is not valid, step b-d (below). The case validation service may have been temporarily down at the time you clicked insert, and because you cannot submit an invoice that has an invalid case number or submit an invoice that has an unverified case number, you need to go back into the case to edit and update it. To do this, just follow the steps referenced in this note and eliminate the step that says to change the case number (since it should already be correct).
   If the case number belongs to a valid case:
   a. If the case number belongs to a valid case, you will receive a case number verification message. Read the message and when ready, click **OK**. The case is now verified and added to the Cases section.
      Important: After clicking insert, the case gets added to a table at the top. Because the case number **is** valid, the "Valid MNCIS Case Number" checkbox located on the far right is checked.
   b. Proceed to step 4.
   If the case number is not valid:
   a. If the case number is **not** a valid case number, you will receive a message. Read the message and when ready, click **OK**.
      Important: After clicking insert, the case gets added to a table at the top. Because the case number is **not** valid, the "Valid MNCIS Case Number" checkbox located on the far right is **not** checked. You cannot submit an invoice with an invalid case number.
   b. To correct the case number, in the table at the top of the Cases section, select the invalid case by clicking **Select**. The details appear.
   c. Click **Edit**. The fields open for editing.
   d. Correct the case number, and click **Update**. A case number verification message appears. If the case number is valid, follow these steps for valid case numbers. If the case number is invalid, repeat these steps for invalid case numbers.
4. To add any more cases, click the **New** hyperlink. A new set of fields opens for completing.
   a. Repeat steps 2-3 until all cases are entered.
5. To return to main invoice, click **Return to Invoice**. You are returned to the invoice and the Cases section is populated with the new case information.

Step Three: Complete the Exams Section (required)

1. To activate the Exams section, in the Cases section, verify that you select the applicable case or that it is already selected.
2. In the Exams section, click **Add/Update Exams**. The Exam Detail appears.
3. To add new exam detail, from the Exam drop-down menu, select an option.

Exam	Description
0.12	Examination at the time of the 60 day report after commitment commenced.
0.17	Examination concerning the patient's request for a change in or release from commitment.
Commitment	Examination performed when a person is being considered for civil commitment.
Commitment/Jarvis	Examination to address both Commitment and Jarvis issues.
Commitment/Price	Examination to address both Commitment and Price issues.
Commitment/Price/Jarvis	Examination to address Commitment, Price, and Jarvis issues.
Jarvis	Examination performed to determine whether a patient meets the standard for forced medication.
Price	Examination performed to determine whether the patient meets the standard for ECT.
Price/Jarvis	Examination to address both Jarvis and Price issues.

4. Click **Insert**. The exam detail is saved.
5. To add another exam detail, click **New**. A new Exam Detail appears.
   a. Repeat steps 3-4 until all exams are entered.
6. To return to main invoice, click **Return to Invoice**. You are returned to the invoice and the Exams section is populated with the new exam information.

To Edit Content in the Invoice:

1. Navigate to the section of data and specific entry that you want to edit, and click **Select**. Now the selected information appears in the table below the list.
   Note: If you only have one specific entry listed, it will already be selected.
2. Click the **Edit** hyperlink. The fields open for editing.
3. Make the necessary changes. See the applicable section of instructions within this Quick Reference for more information.
4. To save the changes, click **Update**.
5. Click **Return to Invoice**.

To Delete Content in the Invoice:

1. Navigate to the section of data and specific entry that you want to edit, and click **Select**. Now the selected information appears in the table below the list.
   Note: If you only have one specific entry listed, it will already be selected.
2. Click the **Delete** hyperlink. The specific entry is deleted.

Warning:
If you delete a case, all associated items with that case (e.g., all services, activities, charges) will be deleted as well. **Verify all items before deleting.**

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Step Four: Complete the Services Section (required)

Important: Enter all services performed on each separate case.

1. To activate the Services section, in the Cases section, verify that you select the applicable case or that it is already selected.
2. In the Services section, click **Add/Update Services**. The Service Detail appears.
3. To add new service detail, complete the required fields.

Field	Action
Date	Provide the date of the service. The recommended date format is: MM/DD/YYYY.
Service	From the drop-down menu, select the type of service (e.g., interview, testimony in court, etc.). Do not select "Other service" unless none of the other options appropriately fit the service that was performed.
Hours	Provide the time that you spent on this service in .25 hour increments. Round up to the nearest .25 increment, as applicable.
Rate	This information will be automatically populated from your normal rate in the system or from the alternate rate, if provided. **Important:** As a contractor or independent examiner, if you enter a rate per hour that exceeds the state policy rate for your degree type, case type or location, or the district policy rate for case type, a warning message will appear stating: "The amount entered exceeds the maximum hourly rate allowed by the District or State Court Administrator's Office Psychological/Psychiatric Examiner Payment Policy, No. 510(a). Unless you have a contract or prior court approval to exceed the maximum rate, you may not be paid the full amount invoiced."
Rate Type	This information will be automatically populated from your normal rate in the system or from the alternate rate, if provided.
Alternate Rate	Provide the alternate rate for the service, if applicable. See **Important** note (located above).
Alternate Rate Type	Provide the alternate rate type for the service, if applicable. For example, per hour or per service.
Alternate Rate Reason	Provide the alternate rate reason for the service, if applicable.

4. Click **Insert**. The service detail is saved.
5. To add another service detail, click **New**. A new Service Detail appears.
   a. Repeat steps 3-4 until all services are added.
6. To return to the main invoice, click **Return to Invoice**. You are returned to the invoice and the Services section is populated with the new services information.

Step Five: Complete the Mileage Section (not applicable)

Note: Please disregard the mileage section as mileage is no longer reimbursed.

Step Six: Complete the Travel Section (if applicable)

1. To activate the Travel section, in the Cases section, verify that you select the applicable case or that it is already selected.
2. In the Travel section, click **Add/Update Travel**. The Travel summary and detail appears.
3. To add new travel detail, complete the required fields.

Field	Action
Is this Billing Under Payment Policy	From the drop-down menu, select Yes of No. Select Yes if you are billing under a policy or select No for alternate billing.
InvoiceCaseID	This field is not editable. The invoice identification number is automatically entered into this field.
TravelDate	From the calendar, select the date for the travel.
Rate	• If you selected Yes in the "Is this Billing Under Payment Policy" field, the Rate field is automatically populated at 60% of the applicable maximum hourly rate. It is not editable. • If you selected No in the "Is this Billing Under Payment Policy" field, the Rate field is editable. Provide the current rate per hour for travel reimbursement.
Hours	Provide the hours of travel in .25 hour increments. Round up to the nearest .25 increment, as applicable.
Amount	This field is not editable. It is automatically calculated by the system. If necessary, click **Calculate** to update the amount.
Comment/Destination	You are required to enter the destination of your travel. You may make additional comments, as applicable.

4. Click **Save/Update Travel**. The travel detail is saved.
5. Click **Return to Invoice**. You are returned to the main invoice.
6. To add more travel, verify that the applicable case is selected (see step 1, above), and under Travel click **Add/Update Travel**. The travel summary appears.
   a. Click **Insert New Travel Billing**. A new Travel Detail appears.
   b. Repeat steps 2-4 until all travel is entered.
   c. When you are done adding travel details, click **Back to Travel List**. You are returned to the main invoice and the Travel section is populated with the new travel information.
7. To return to the main invoice, click **Return to Invoice**. You are returned to the main invoice and the Travel section is populated with the new/revised travel information.

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Step Seven: Complete the Extraordinary Charges Section (if applicable)

Note: If you anticipate extraordinary charges, your county or district may request prior authorization for those charges.

1. To activate the Extraordinary Charges section, in the Cases section, verify that you select the applicable case or that it is already selected.
2. In the Extraordinary Charges section, click **Add/Update Extraordinary Charges**. The Extraordinary Charge Detail appears.
3. To add new extraordinary charge detail, complete the required fields.

Field	Action
Date	Provide the date that the charge incurred. The recommended date format is: MM/DD/YYYY.
Charge	From the drop-down menu, select an applicable charge (e.g., meals, photocopying, etc.).
Amount	Provide the exact amount of the charge.
Comments	Provide a comment that will further describe the charge, if applicable.

4. Click **Insert**. The extraordinary charges detail is saved.
5. To add another extraordinary charges detail, click **New**. A new Extraordinary Charge Detail appears.
   a. Repeat steps 3-4 until all extraordinary charges are entered.
6. To return to the main invoice, click **Return to Invoice**. You are returned to the invoice and the Extraordinary Charges section is populated with the new extraordinary charges information.

Step Eight: Submit the Invoice

Important:
Verify that you have reviewed all of your entries and that the figures are accurately reflecting all work done on the file (i.e., make sure that all services are properly entered for each case and that the total hours reflect the work completed). If they are incorrect, it may slow down the invoice submitting process.

If an invalid district court case number has been entered, a message will appear. The case number must be corrected before you may submit the invoice (on Page 2 see Step Two: Complete the Cases Section for more details).

1. Before submitting the invoice, you can view the case summary and invoice summary. At the bottom of the screen containing all the information for the selected invoice, a Case Summary and Invoice Summary are displayed.
2. When you are ready to submit the invoice, in the Submission section, click **Submit Invoice for Approval**. A message appears asking if you are sure about submitting the invoice.
   Note: Depending on the case that is currently selected, the Case Summary will display that case's information. If there are several cases on the invoice, this summary will change when selecting different cases. However, the Invoice Summary will always stay the same since it is the complete total of the entire invoice.
3. If you are sure, click **Submit Invoice for Approval – are you sure**. A message appears stating that the invoice has been submitted.
4. To exit the current invoice, click **Back to List**. You are returned to the list of invoices.
   OR
   To exit the invoices section, using the main toolbar navigate to your desired location.

Viewing an Invoice

If you want to view the status of an invoice that you have already submitted, view an invoice that has been denied, or view an invoice that you have not fully completed, please follow the applicable steps below. You can also use this viewing invoices option to fix errors in a denied invoice and resubmit it.

Important: Updates cannot be made to an invoice if it has already been submitted for approval. If you select an invoice with a status such as this, a message will appear stating that you cannot make modifications at this time.

Warning: If you delete a case, *all* associated items with that case (e.g., all services, activities, charges) will be deleted as well. Verify all items before clicking delete.

1. From the menu of options, select **Examiner** >> **Invoices**. The Invoice Options appear.
2. To view an invoice, click the **View All Invoices** hyperlink. A list of invoices appears.

Status	Description
Submitted	Indicates that the invoice has been submitted by the examiner.
Incomplete	Indicates that the examiner has not yet submitted the invoice for approval.
Approval Denied	Indicates that the invoice has been denied by one of the approvers. It is returned to the examiner for additional information or corrections.
Approved by County	Indicates that the first approval has been successful and completed.
Approved by District	Indicates that the final approval has been completed and the invoice is ready to be entered into MAPS. **This is the final step in the approval invoice process.**

3. To select an invoice, click the **Select** hyperlink to the left of the invoice. The selected invoice appears.
4. To view specific information, under the Cases header of the desired case, click the **Select** hyperlink. The selected information appears below.
5. If the invoice has been denied by the approver, you may have received a reason for the denial in an email from the approver.
   OR
   For more information from the approver, to contact him/her on why the invoice was denied, at the bottom of the invoice, click the email address. An email opens.
   a. Complete the email and send to the approver.
6. At the bottom of the screen containing all the information for the selected invoice, a Case Summary and Invoice Summary are displayed.
   Note: Depending on the case that is currently selected, the Case Summary will display that case's information. If there are several cases on the invoice, this summary will change when selecting different cases. However, the Invoice Summary will always stay the same since it is the complete total of the entire invoice.
7. To edit or add to an incomplete invoice or an invoice that has been denied, follow the applicable procedure in this cheat sheet.
8. Once you have corrected the errors as needed and are ready to re-submit the fixed portion of the invoice, in the submission section, click **Re-Submit Denied Portion of Invoice**. A message appears asking if you are sure about submitting the invoice.
9. If you are sure, click **Submit Invoice for Approval – are you sure**. A message appears stating that the invoice has been submitted.
10. To exit the current invoice, click **Back to List**. You are returned to the list of invoices.
    OR
    To exit the invoices section, use the main toolbar to exit or navigate to your desired location.