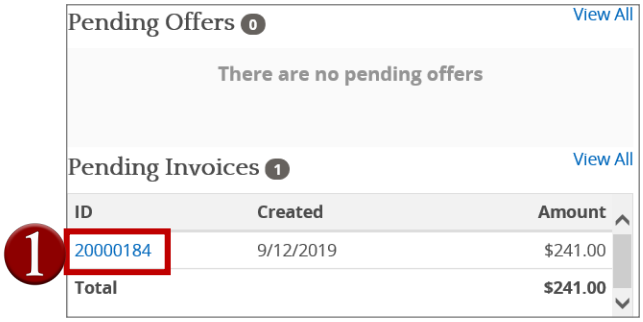
Quick Reference Guide

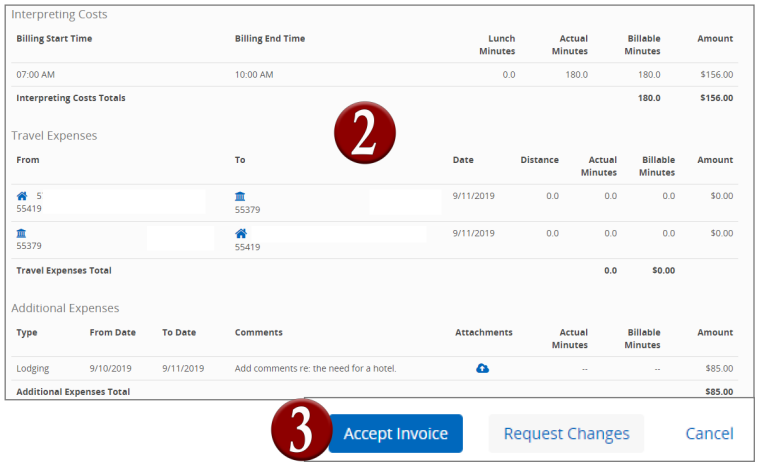
Working with Invoices and Reimbursement Expenses

Review, update, and submit a pending invoice for payment

Submit an invoice with no additional expenses or disputes.

1. Click the **invoice ID number** to open and view details.
2. Review invoice information for accuracy.
   - Hearing details (sign in/out time, case number, location, type, etc.)
   - Assignment Rate
   - Interpreting Costs
   - Travel Expenses, if applicable - Google Maps is the standard used to calculate mileage.
   - Additional Expenses, if applicable
3. Click **Accept Invoice**. The invoice is sent for approval and payment. See the section **Find the status of an invoice** on page 4.

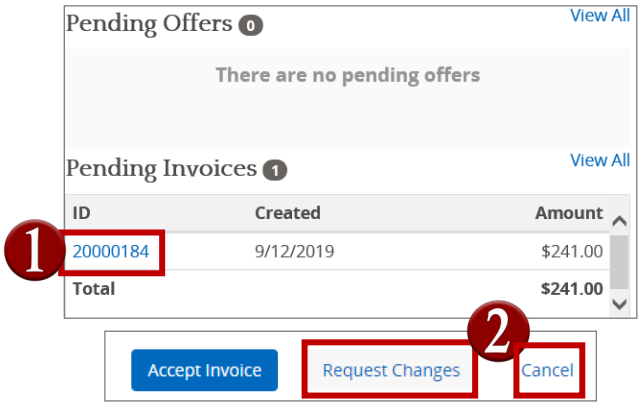


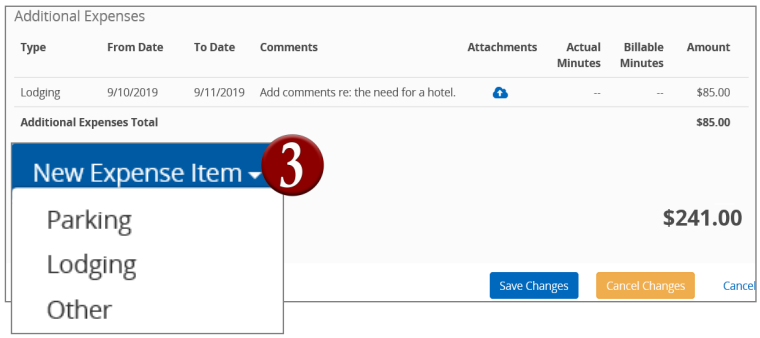


Submit an invoice with an Expense.

1. Click the **invoice ID number** to open and view details.
2. Click **Request Changes** to add a new expense. If needed, click **Cancel** to undo this action.
3. Click the **New Expense Item** drop-down and click on the type of expense you want to add.

Be sure to review the interpreter payment policy prior to adding expenses to an invoice.





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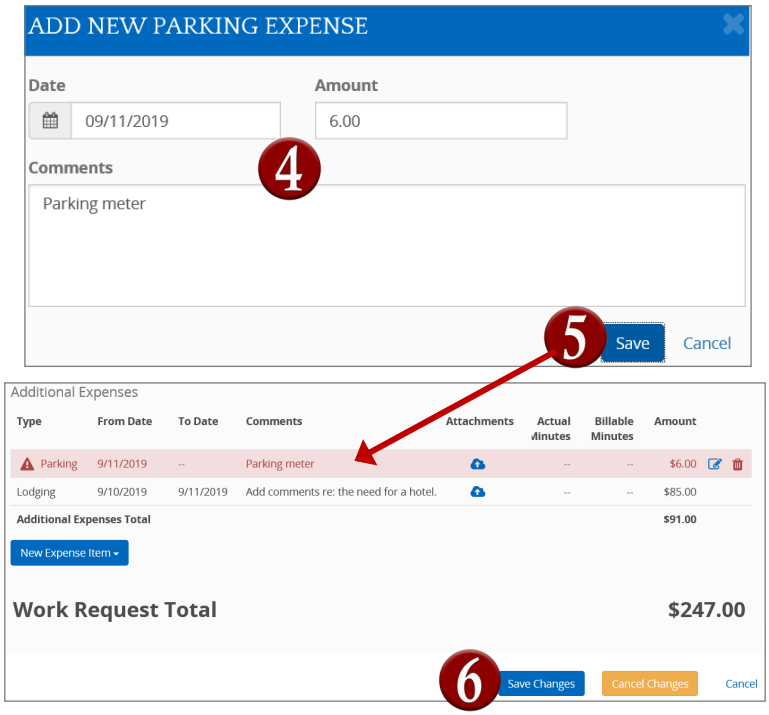
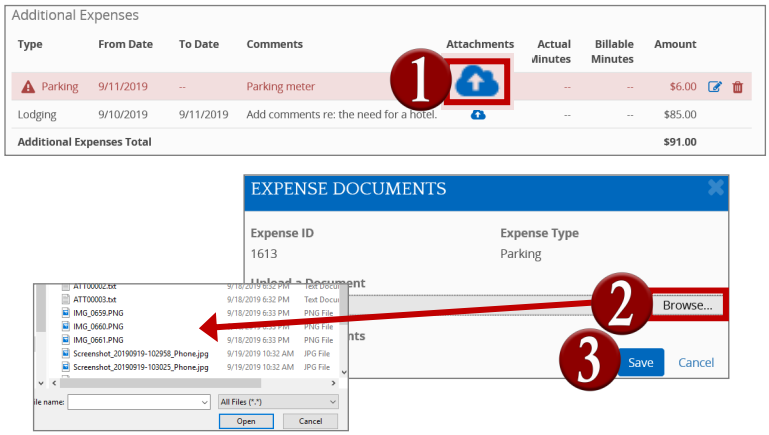
4. Enter expense information such as date of expense, amount of expense, and a comment, if needed.
5. Click **Save.** The expense is added to the invoice and is sent to the scheduling specialist for review and approval.
6. Click **Save Changes**. Make sure to upload any needed receipts to the expense prior to submitting the invoice. See the next section, **Upload expense documentation to an invoice**.



Upload expense receipt to an invoice

1. Click the **attachment** icon.
2. Click **Browse** and select the document you want to upload from your files.
3. Click **Save**. The attachment icon shows the number of uploaded documents.

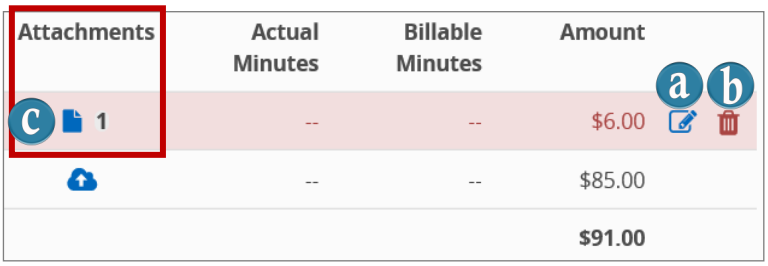


Manage an expense or attachment

a. Click the **edit** icon to change expense information.

b. Click the **delete** icon to manage or delete an attachment.

c. Click the **attachment** icon to remove an expense.



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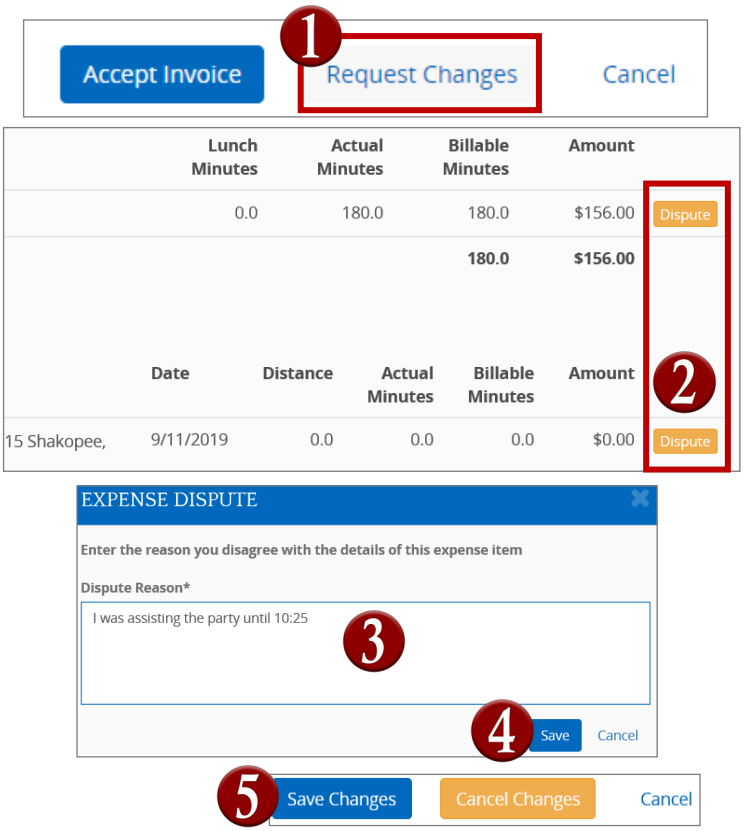
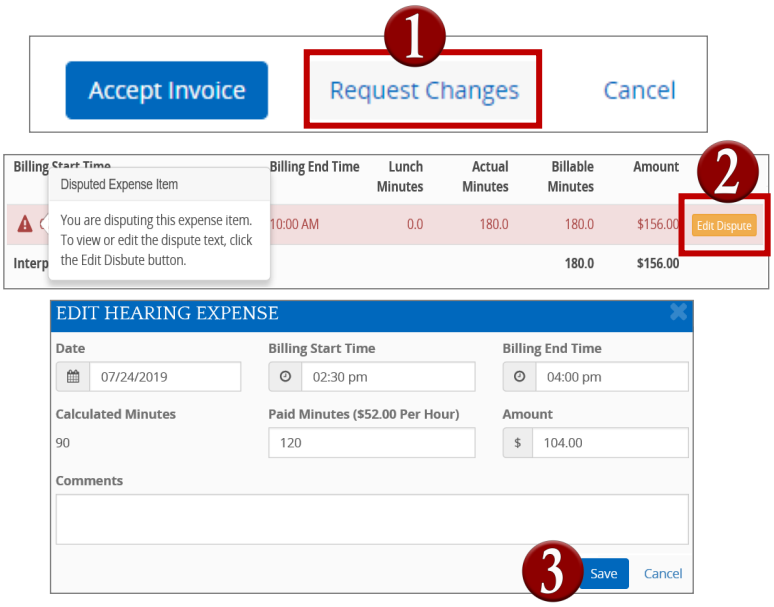
Dispute an invoice

1. Click **Request Changes.**
2. Click **Dispute** on the line of the item you want to dispute.
3. Enter the reason for dispute in the required comment box.
4. Click **Save**. If you entered a dispute in error, click **Edit Dispute** to edit or delete the dispute.
5. Click **Save Changes**. The dispute is sent to the scheduling specialist for review.



Edit a Dispute

1. Click **Request Changes.**
2. Click **Edit Dispute** on the line of the item you want to edit.
3. Click **Save**. The invoice is updated.
4. Click **Submit Changes**. The invoice is sent to the scheduler for a review.



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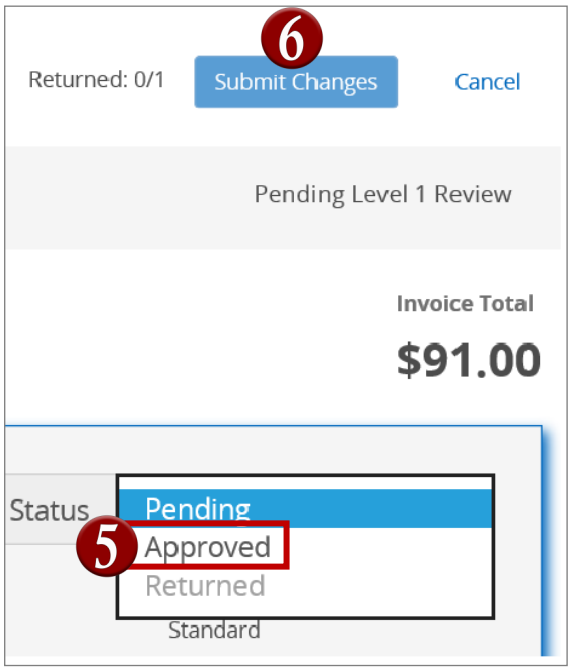
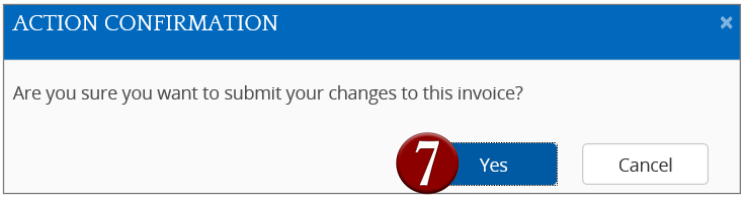
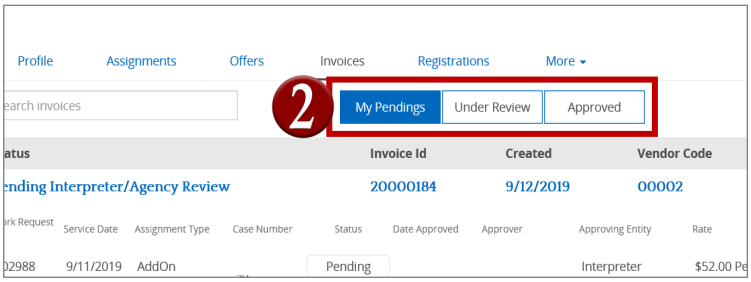
5. Update Status to **Approved**.
6. Click **Submit Changes**.
7. Click **Yes** to confirm. The updated invoice is sent to scheduler for review.





View Invoices by status

1. Click **Invoices.**
2. Select a Status:

- **My Pendings** - View, edit, and submit your pending invoice.
- **Under Review** - View the status of invoices you have submitted for payment and are pending approval.
- **Approved** - View the status of approved invoices and pay date.