

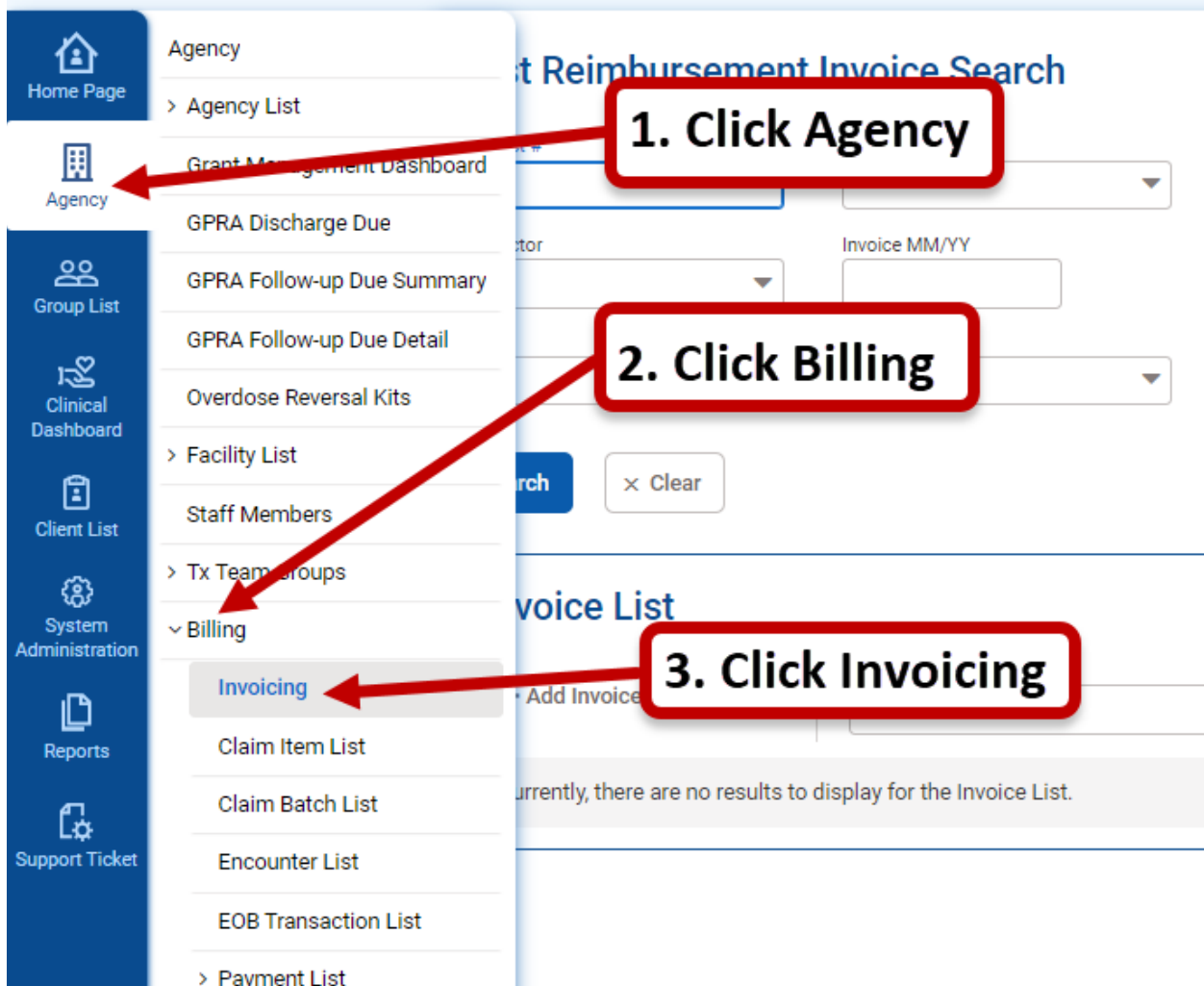
## HI WITS Training: Invoicing

To receive payment from ADAD, Providers must submit an invoice on a monthly basis. This document presents how to create an invoice and bill an invoice.

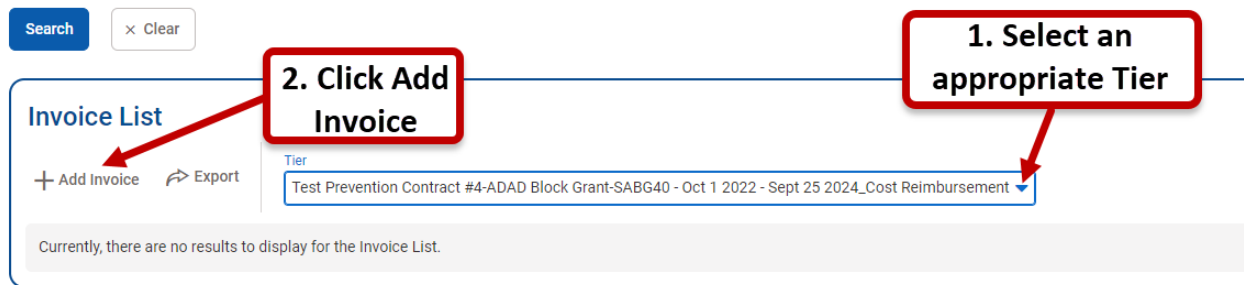
**Note:** The Provider will complete Monthly Service Forms and email it to their Contract Manager (CM) and cc: [DOH.ADAD.PREVENTION@doh.hawaii.gov](mailto:DOH.ADAD.PREVENTION@doh.hawaii.gov), the same day of the invoice submission in WITS. Users must have the following Roles: Agency Billing, Agency Invoicing (Full Access), and Invoice Attestation.

### 1. Create a New Invoice

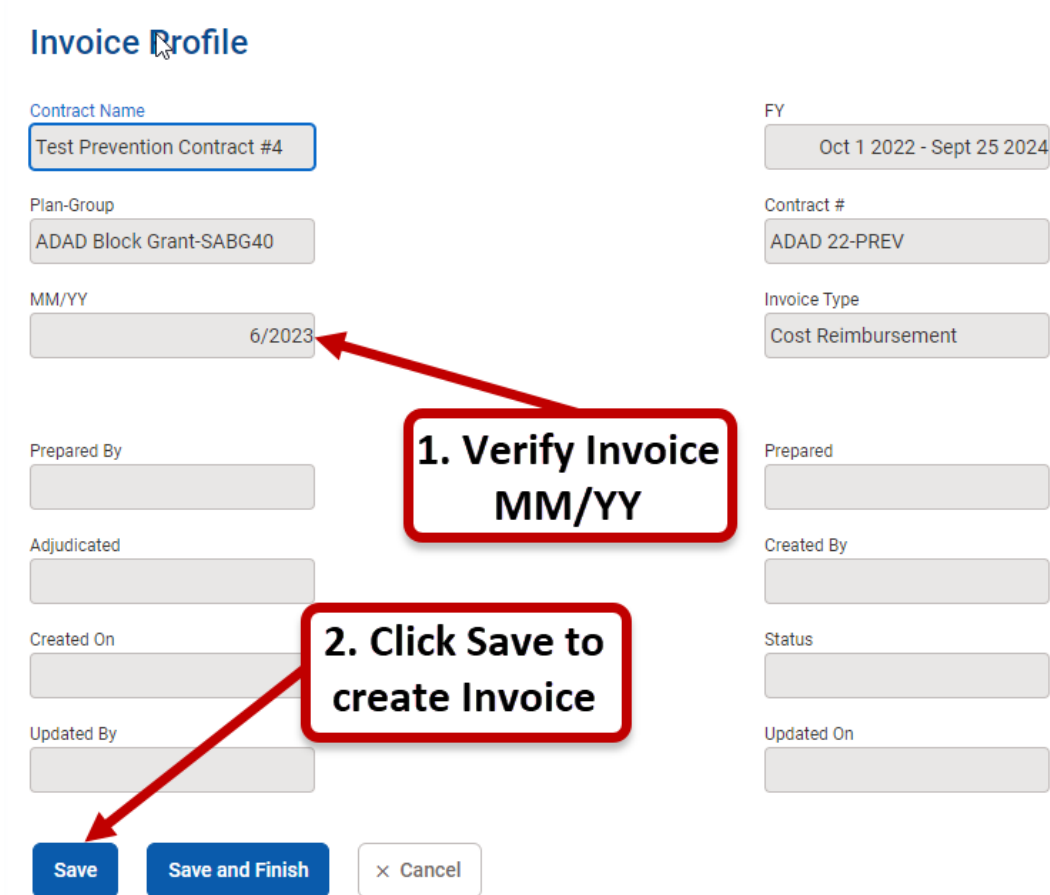
To access the WITS Invoicing function, click on **Agency** from the Left Menu Pick. Then click on **Billing** and **Invoicing**.



- a. Select a **Tier** by using the dropdown menu.
- b. Click on the **Add Invoice** link.



- c. The Invoice Profile is pre-filled. Verify the invoice **MM/YY** field is correct.
- d. Click on **Save** to continue if all fields are correct. If the fields are incorrect, click Cancel to return to the previous screen.



- e. The Line Items are displayed. To select an Item Category, hover over the **three-dot menu** and click on **Edit**.

The screenshot shows the 'Line Items' form. At the top, there are fields for 'Update Invoice', 'Line Item', and 'Current Month'. Below this is a table with columns: Category, Line Item, Prior Period to Date - Paid, Current Month - Invoice, Current Month - Budget, Period to Date - Paid Estimate, Period to Date - Budget, and Total Budget. A row is highlighted with a yellow background, showing 'OTHER CURRENT EXPENSES' for 'Monthly Billing' with a 'Total Budget' of '\$125,000.00'. A three-dot menu is visible at the end of this row, with an 'Edit' button highlighted by a red box and an arrow pointing to it. A red callout box above the table says 'Hover over the three dots and click Edit'. Below the table, there is a 'Current Month Invoice-Total' field showing '\$0.00'.

- f. Enter the amount in the **Current Month** field for the month you are billing for and click **Update Invoice**.
- g. Click on **Save**.

This screenshot shows the 'Line Items' form with annotations. A red box labeled '1. Enter amount' points to the 'Current Month' input field, which now contains the value '500'. A red box labeled '2. Click Update Invoice' points to the 'Update Invoice' button. A red box labeled '3. Click Save' points to the 'Save' button. The table below shows the 'Current Month - Invoice' column updated to '\$0.00' and the 'Total Budget' column updated to '\$125,000.00'. The 'Current Month Invoice-Total' field below the table now shows '\$0.00'.

- h. The amount is now updated in the **Current Month Invoice-Total** field.
- i. Click on **Save and Finish**.

This screenshot shows the 'Line Items' form after the final update. A red box labeled 'Click Save and Finish' points to the 'Save and Finish' button. The 'Current Month Invoice-Total' field below the table now shows '\$2,500.00'. A red dashed arrow labeled 'Updated amount shown' points from the 'Current Month Invoice-Total' field to the 'Current Month - Invoice' column in the table, which now displays '\$2,500.00'. The 'Total Budget' column remains at '\$125,000.00'.

j. Review the Invoice List to confirm the **Status** of the invoice update.

Invoice List

+ Add Invoice   Export   Tier  
Test Prevention Contract #4-ADAD Block Grant-SABG40 - Oct 1 2022 - Sept 25 2024,....

Invoice ID	Contract Name (Number)	Plan-Group	Invoice Type	Invoice Period (FY)	Amount Invoiced	Amount Paid	Status	
1137	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	11/2022 (Oct 1 2022 - Sept 25 2024)	\$2,300.00	\$2,300.00	Paid	⋮
2151	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	12/2022 (Oct 1 2022 - Sept 25 2024)	\$2,500.00		Billed	⋮
2154	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	1/2023 (Oct 1 2022 - Sept 25 2024)	\$0.00		Awaiting Review	⋮
2155	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	2/2023 (Oct 1 2022 - Sept 25 2024)	\$0.00		Awaiting Review	⋮
2157	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	3/2023 (Oct 1 2022 - Sept 25 2024)			Awaiting Review	⋮
2158	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	4/2023 (Oct 1 2022 - Sept 25 2024)	\$2,500.00		Awaiting Review	⋮
2159	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	5/2023 (Oct 1 2022 - Sept 25 2024)	\$2,500.00		Awaiting Review	⋮
2169	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	6/2023 (Oct 1 2022 - Sept 25 2024)	\$500.00		Awaiting Review	⋮

**Confirm the Status**

## 2. Billing the Invoice

a. Find the invoice located in the Invoice List. Hover over the **three-dot menu** and click **Profile**.

Invoice List

+ Add Invoice   Export   Tier  
Test Prevention Contract #4-ADAD Block Grant-SABG40 - Oct 1 2022 - Sept 25 2024,....

Invoice ID	Contract Name (Number)	Plan-Group	Invoice Type	Invoice Period (FY)	Amount Invoiced	Amount Paid	Status	
1137	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	11/2022 (Oct 1 2022 - Sept 25 2024)	\$2,300.00	\$2,300.00	Paid	⋮
2151	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	12/2022 (Oct 1 2022 - Sept 25 2024)	\$2,500.00		Billed	⋮
2154	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	1/2023 (Oct 1 2022 - Sept 25 2024)	\$0.00		Awaiting Review	⋮
2155	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	2/2023 (Oct 1 2022 - Sept 25 2024)			Awaiting Review	⋮
2157	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	3/2023 (Oct 1 2022 - Sept 25 2024)			Awaiting Review	⋮
2158	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	4/2023 (Oct 1 2022 - Sept 25 2024)	\$2,500.00		Awaiting Review	⋮
2159	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	5/2023 (Oct 1 2022 - Sept 25 2024)	\$2,500.00		Awaiting Review	⋮
2169	Test Prevention Contract #4 (ADAD 22-PREV)	ADAD Block Grant-SABG40	Cost Reimbursement	6/2023 (Oct 1 2022 - Sept 25 2024)	\$500.00		Awaiting Review	⋮

**Hover over the three dots and click Profile**

- Profile
- View Paid Invoice
- Delete

b. On the Invoice Profile screen, click on **Sign Invoice**.

The screenshot shows the 'Line Items' section of the invoice profile. At the top, there are input fields for 'Line Item' and 'Current Month'. Below this is a table with the following data:

Category	Line Item	Prior Period to Date - Paid	Current Month - Invoice	Current Month - Budget	Period to Date - Paid Estimate	Period to Date - Budget	Total Budget
OTHER CURRENT EXPENSES	Monthly Billing	\$4,800.00	\$500.00		\$5,300.00		\$125,000.00

Below the table, there is a 'Current Month Invoice-Total' box showing '\$500.00'. An 'Attestation' box contains the text: 'I, Owens, Jerrica; Administrator, on 7/2/2024, am verifying the information in this invoice is correct and accurate to the best of my knowledge.' At the bottom left, there is a blue 'Sign Invoice' button, which is highlighted with a red box and a red arrow pointing to it from a red box containing the text 'Click Sign Invoice'.

**Note:** Only one invoice can be billed per month. The ADAD Fiscal officer will review invoice and Reject or Approve invoice submission.

c. The Attestation field is updated. Click on **Bill It** in the Administrative Actions box.

This screenshot is similar to the previous one, but the 'Attestation' box is updated with the text: 'Signed by Owens, Jerrica; Administrator, 7/2/2024 8:04:57 AM. I, Owens, Jerrica; Administrator, on 7/2/2024, am verifying the information in this invoice is correct and accurate to the best of my knowledge.' The table below it shows the 'Current Month - Invoice' value as '\$500.00'. At the bottom left, there is a blue 'Bill It' button, which is highlighted with a red box and a red arrow pointing to it from a red box containing the text 'Click Bill It'. The 'Administrative Actions' box is also visible, containing the 'Bill It' button.

If you have any questions, please call the WITS Staff or email DOH.ADAD.WITSHelp@doh.hawaii.gov.