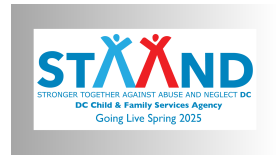


STAAND – How to Complete an Ad-Hoc Invoice (Existing Non-Contracted Providers)



With the introduction to our new system, STAAND, users' work will be paramount (and crucial) to maintain productivity and ensuring seamless collaboration within STAAND. The tip sheet explains how to create ad-hoc invoices in STAAND for Existing Providers, which were migrated from FACES.NET.

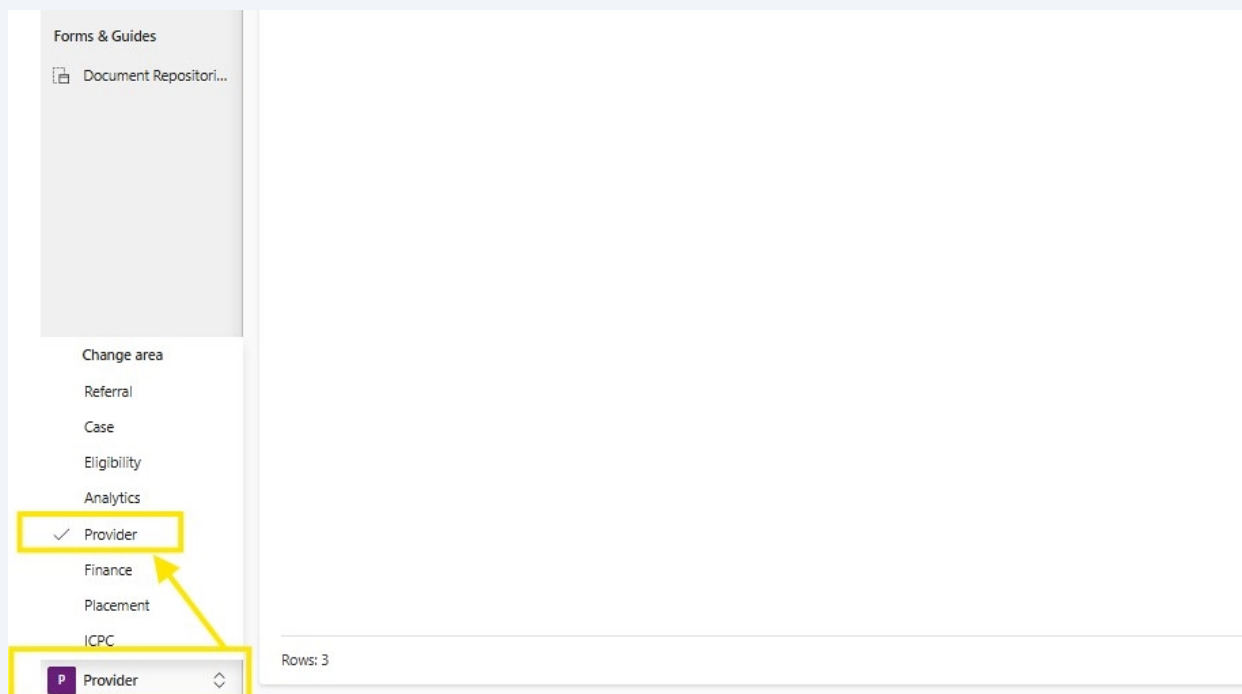


Tip! Before you proceed with an Ad-Hoc Invoice, a PROVIDER already must be created in STAAND, and that PROVIDER must have an **active** Contract / Services also created by authorized STAAND users.

Tip! The users creating "invoices" are usually not the person creating Contract / Service Lines in STAAND.

1

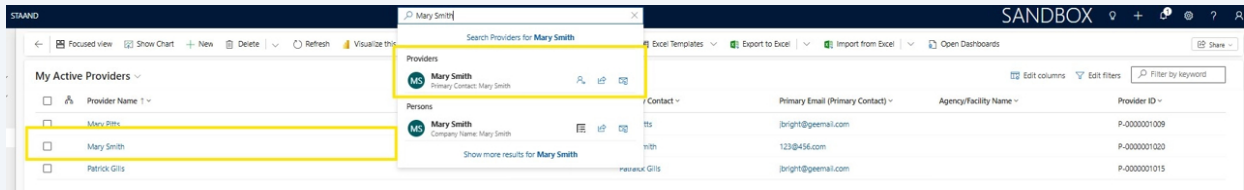
Proceed to the Site Map Work Selector and toggle to the **PROVIDER** module.



2

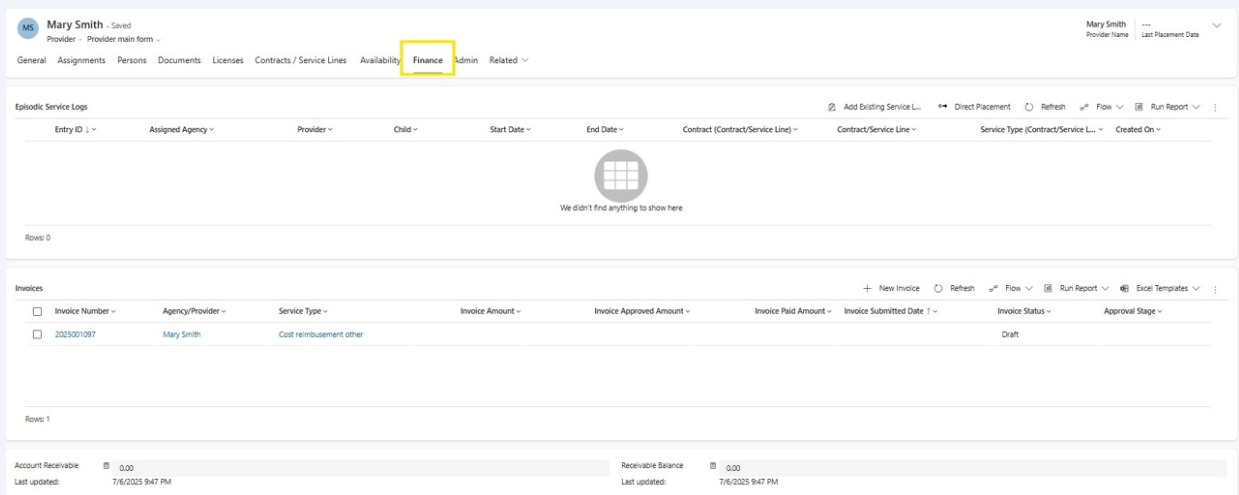
In the Global Search, you will conduct a search for the **PROVIDER** that you are looking for.

In this tip sheet, we are searching for Mary Smith as the Provider who is looking to be paid for services.



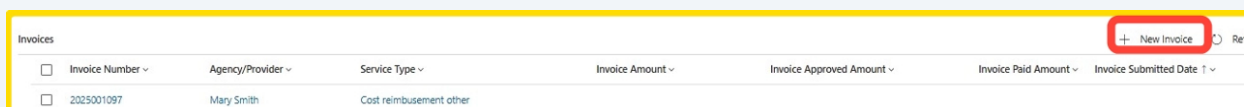
3

After selecting the **PROVIDER** (ex. **Mary Smith**), hover over to the **Finance** tab, and select it.



4

Scroll down to the **Invoices** subgrid, and select **+ New Invoice** to open the Invoice page.



5

The New Invoice page is mainly pulling data from key data points when selecting the appropriate service type .

New Invoice - Unsaved

General Admin Approvals Document Covers

Invoice Number		CFSA Contract	
Provider Invoice Number	---	Report Month	
Agency/Provider	* Mary Smith x	Start Date	
Service Type	---	End Date	
Invoice Submitted Date			
Description	---		



Tip! Only 1 field is "mandatory" - Agency / Service Provider. All other fields are considered "non-mandatory". Highly recommended to enter a Description into the field

6

Hit the **Save** button on the Action Toolbar and STAAND will create the Draft Invoice Number and open up the Invoice Lines subgrid.

← ↻ Save Save & Close + New Deactivate Submit Refresh Check Access Change Owner Flow Word Templates Run Report share

2025001098 - Saved Invoice Draft Invoice Status

General Admin Approvals Document Covers Related

Invoice Number	2025001098	CFSA Contract		Invoice Amount	
Provider Invoice Number	---	Report Month		Invoice Approved Amount	
Agency/Provider	* Mary Smith x	Start Date		Invoice Paid Amount	
Service Type	---	End Date		Not Paid Reason	
Taxable	<input checked="" type="radio"/> Yes	Invoice Submitted Date			
Description	Test 123				

I Certify this Invoice is true and correct to the best of my knowledge ☒ Yes ☐ No

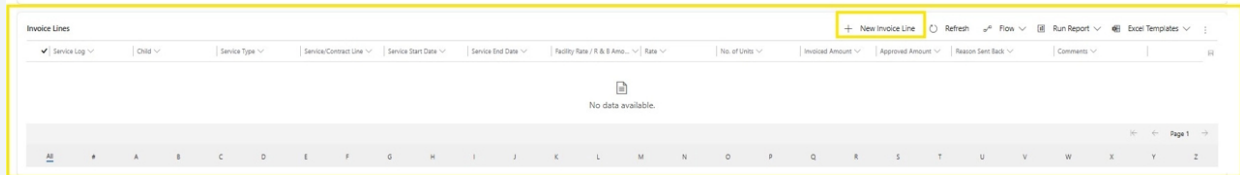
Invoice Lines + New Invoice Line Refresh Flow Run Report Excel Templates

Service Log	Child	Service Type	Service/Contract Line	Service Start Date	Service End Date	Facility Rate / R & S Amt	Rate	No. of Units	Invoice Amount	Approved Amount	Reason Sent Back	Comments
No data available.												

Page 1

7

Scroll down to the **Invoice Lines** subgrid, and select **+ New Invoice Line** to open the Invoice page. This is the step where you will link the invoice with the service line, which was already in the **PROVIDER** profile.



8

After clicking **+ New Invoice Line**, a new window will open and the **Agency** field will "auto-populate".

New Invoice Line - Unsaved

General Admin

Agency	* Mary Smith	Contract/Service Line	*
Provider		Service/ Goods rendered	
Child		Service Type	
Service Start Date	*	Service Log	
Service End Date	*	No. of Units	
		Rate	*
Invoiced Amount	*	Reason Sent Back	---
Approved Amount		Comments	
Net Amount		Recoup Amount	
Error Description			

9

Click the magnifying glass in the CHILD field to associate the CHILD. In this example, we selected "Lue Miller".

New Invoice Line - Unsaved

General Admin

Agency	* Mary Smith Provider	Contract/Service Line	* ---
Provider	---	Service/ Goods rendered	---
Child	Lue Miller	Service Type	---
Service Start Date	* ---	Service Log	---
Service End Date	* ---	No. of Units	---
		Rate	* ---
Invoiced Amount	* ---	Reason Sent Back	---

10

Select the **Start Date & End Date**.

New Invoice Line - Unsaved

General Admin

Agency	* Mary Smith Provider	Contract/Service Line	* ---
Provider	---	Service/ Goods rendered	---
Child	Lue Miller	Service Type	---
Service Start Date	* 6/2/2025	Service Log	---
Service End Date	* 6/19/2025	No. of Units	---
		Rate	* ---



Tip! The Start Date & End Date can never be in the future. The activity must have completed to allow you to successfully complete an "ad-hoc" invoice.

11

Click the magnifying glass icon in the Contract / Service Line field to link the invoice to the Contract / Service Line that was previously created under the **PROVIDER**.

In this example, select **Child Care, Licensed In-Home DC Full Day**.

New Invoice Line - Unsaved

General Admin

Agency	* Mary Smith Provider	Contract/Service Line	* Look for Service/Contract Line
Provider	---	Service/ Goods rendered	Contract / Service Lines
Child	Lue Miller	Service Type	Child Care, Licensed In-Home DC Full Day -2025-01-01
Service Start Date	* 6/2/2025	Service Log	Guardianship Subsidy Level 1 100%-Lue Miller
Service End Date	* 6/19/2025	No. of Units	Guardianship Subsidy/Foster Care-Lue Miller
		Rate	* Respite Care
			+ New Advanced

Invoiced Amount	* ---	Reason Sent Back	---
Approved Amount	---	Comments	---
Net Amount	---	Recoup Amount	---

12

After the selection of the Contract / Service Line (ex. **Child Care, Licensed In-Home DC Full Day**), the service type will auto-populate with the appropriate service type (ex. **Child Care, Licensed In-Home DC Full Day**)

New Invoice Line - Unsaved
















General Admin

Agency	* Mary Smith Provider	Contract/Service Line	* Child Care, Licensed I...
Provider	---	Service/ Goods rendered	---
Child	Lue Miller	Service Type	Child Care, Licensed In-Home...
Service Start Date	* 6/2/2025	Service Log	---
Service End Date	* 6/19/2025	No. of Units	---
		Rate	* ---

13 Enter the **Rate** information (mandatory field).

New Invoice Line - Unsaved





General Admin

Agency	*   Mary Smith Provider	Contract/Service Line	*   Child Care, Licensed I...  
Provider	--- 	Service/ Goods rendered	---
Child	 Lue Miller  	Service Type	  Child Care, Licensed In-Home...
Service Start Date	* 6/2/2025 	Service Log	
Service End Date	* 6/19/2025 	No. of Units	---
		Rate	* \$25.00

14 Enter the Invoiced Amount information (mandatory field).

New Invoice Line - Unsaved

General Admin

Agency	* 🔒  Mary Smith Provider	Contract/Service Line	* 🔒  Child Care, Licensed I... x 🔍
Provider	--- 🔍	Service/ Goods rendered	---
Child	 Lue Miller x 🔍	Service Type	🔒  Child Care, Licensed In-Home...
Service Start Date	* 6/2/2025 📅	Service Log	🔒
Service End Date	* 6/19/2025 📅	No. of Units	---
		Rate	* \$25.00

Invoiced Amount	* \$300.00	Reason Sent Back	🔒 ---
Approved Amount	🔒	Comments	🔒
Net Amount	🔒	Recoup Amount	🔒

15 Click the **Save & Close** button on the Action Toolbar.

The screenshot shows the 'New Invoice Line' form in an 'Unsaved' state. The 'Action Toolbar' at the top contains buttons for navigation, saving, and creating new items. The 'Save & Close' button is highlighted with a yellow box. Below the toolbar, the form has tabs for 'General' and 'Admin'. The 'General' tab is active, showing fields for Agency, Provider, Child, Service Start Date, Service End Date, Contract/Service Line, Service/ Goods rendered, Service Type, Service Log, No. of Units, and Rate. The 'Save & Close' button is highlighted with a yellow box.

16 The **Invoice Lines** subgrid will update based on the information you entered in the previous steps.

The screenshot shows the 'Invoice Lines' subgrid within an invoice form. The invoice number is 2025003443, and the status is 'Draft'. The 'General' tab is active, showing fields for Taxable, Invoice Submitted Date, and Description. The 'Invoice Lines' subgrid is highlighted with a yellow box. It contains a table with columns for Service Log, Child, Service Type, Service/Co..., Service Star..., Service End..., Facility Rate /..., Rate, No. of Units, Invoiced..., Approve..., Reason Sent Back, and Comment. The table has one row of data. The 'Save & Close' button is highlighted with a yellow box.

Service Log	Child	Service Type	Service/Co...	Service Star...	Service End...	Facility Rate /...	Rate	No. of Units	Invoiced...	Approve...	Reason Sent Back	Comment
---	Lue Miller	Child Care...	Child Care...	6/2/2025	6/19/2025	50.00	\$25.00	---	\$0.00	\$0.00	---	---

17 The Invoice will now also populate a **Provider Invoice Number**.

The screenshot shows a web application interface for creating an invoice. At the top, there is a toolbar with various actions like Save, Deactivate, Submit, Refresh, Check Access, Flow, and Run Report. Below the toolbar, the header area displays the invoice number '2025003443' as 'Saved' and the status 'Draft'. The main form area is divided into several sections. The 'General' tab is selected, showing fields for 'Invoice Number' (2025003443), 'CFSA Contract', 'Invoice Amount', 'Provider Invoice Number' (NFC06950), 'Report Month', 'Invoice Approved Amount', 'Agency/Provider' (Mary Smith Provider), 'Start Date', 'Invoice Paid Amount', 'Service Type', 'End Date', 'Not Paid Reason', 'Taxable' (Yes), and 'Invoice Submitted Date'. The 'Description' field contains 'Monthly Adoption child care expense'. At the bottom, there is a certification section with a toggle switch set to 'No'.

18 Click the **Document Covers** tab on the Action Toolbar.

This screenshot shows the same invoice form as in the previous image, but with the 'Document Covers' tab highlighted in the 'General' section of the form. The 'Document Covers' tab is located in the top right corner of the form area, next to the 'Related' dropdown menu. The 'Provider Invoice Number' field is still populated with 'NFC06950'.



Tip! Adding a Document Cover will allow users to provide the required supporting document (ie - copy of invoice, receipt, appointment fee, etc).

19

Scroll down to select **+ New Document Cover** to attach invoice supporting documentation.

The screenshot shows a software interface for managing document covers. At the top, there's a header bar with the text '2025003443 - Saved Invoice' on the left and 'Draft Invoice Status' on the right. Below the header, there are tabs: 'General', 'Admin', 'Approvals', 'Document Covers' (which is selected), and 'Related'. The main area is a table with columns: 'Document Type', 'Document Sub Type', 'Description', and 'Created On'. A yellow box highlights the '+ New Document Cover' button in the top right corner of the table area. Below the table, there is a message 'We didn't find anything to show here' and 'Rows: 0'.

20

Click **Document Sub Type** and use the **magnifying glass** to select the appropriate document you will upload into STAAND as supporting documentation.

The screenshot shows the 'New Document Cover' form, which is currently 'Unsaved'. The 'General' tab is selected. The 'Document Sub Type' dropdown menu is open, showing a search bar with the text 'Look for Document Sub Type' and a magnifying glass icon. Below the search bar, there is a list of document configurations: 'Adoption - Subsidy', 'Adoption Addendum - Case document', 'Adoption Interim Report - Document Translation', 'Approved Complaint - Fair Hearing Request Form', and 'Adoption Report - Initial'. A yellow box highlights the dropdown menu. At the bottom of the dropdown, there is an 'Advanced' link.

21 Enter a **Title** for the Document (mandatory)

New Document Cover - Unsaved

General

Document Sub Type *

Subsidy x

Title *

Document

Document Signed

No

Visible On Portal

No

Description

Saved info

Receipt

22 Click the **Save** button to open up the page to allow you to upload the document into STAAND.

← ↻ Save & Close Flow

New Document Cover - Unsaved Ready Status

General

Document Sub Type *

Supported Documents x

Title *

Receipt

Document Extension

Document Signed

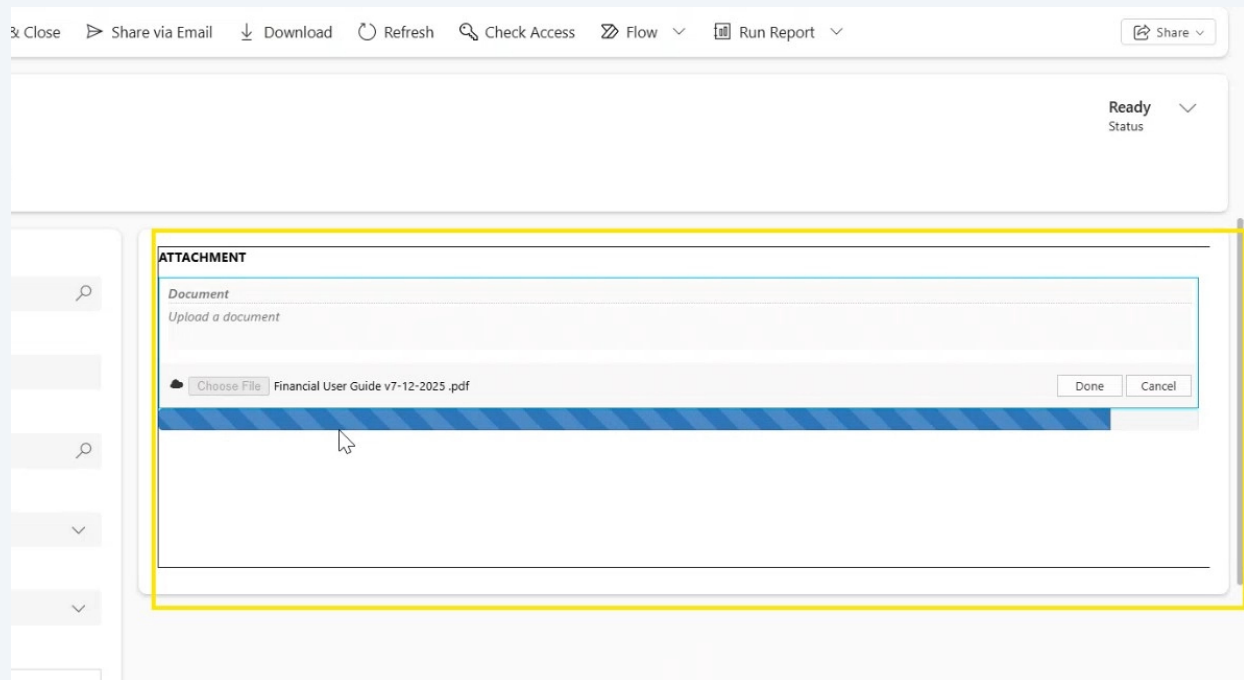
No

Visible On Portal

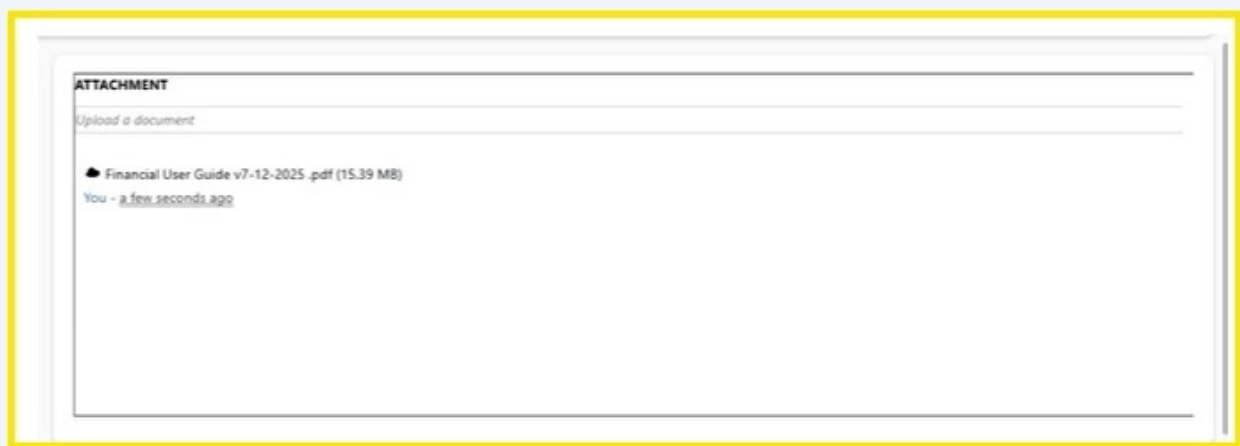
No

Description

23 Upload the Supporting Document(s) into STAAND for the Ad-Hoc Invoice.



24 The supporting document will have been successfully uploaded.



25 STAAND will now display the supporting documentation into the Invoice section.

2025003443 - Saved Invoice Draft Invoice Status

General Admin Approvals **Document Covers** Related

+ New Document Cover Refresh Flow

<input type="checkbox"/> Document Type	Document Sub Type	Description	Created On
<input type="checkbox"/> Invoice	Supported Documents		7/3/2025 3:24 PM

Rows: 1

26 Now, the final step will require you toggle to advise that you certify the invoice that "it is true and to your best to your knowledge".

← Save Save & Close + New Deactivate Submit Refresh Check Access Flow Run Report Share

2025003443 - Unsaved Invoice Draft Invoice Status

General Admin Approvals Document Covers Related

Description Monthly Adoption child care expense

I Certify this Invoice is true and correct to the best of my knowledge ☒ Yes

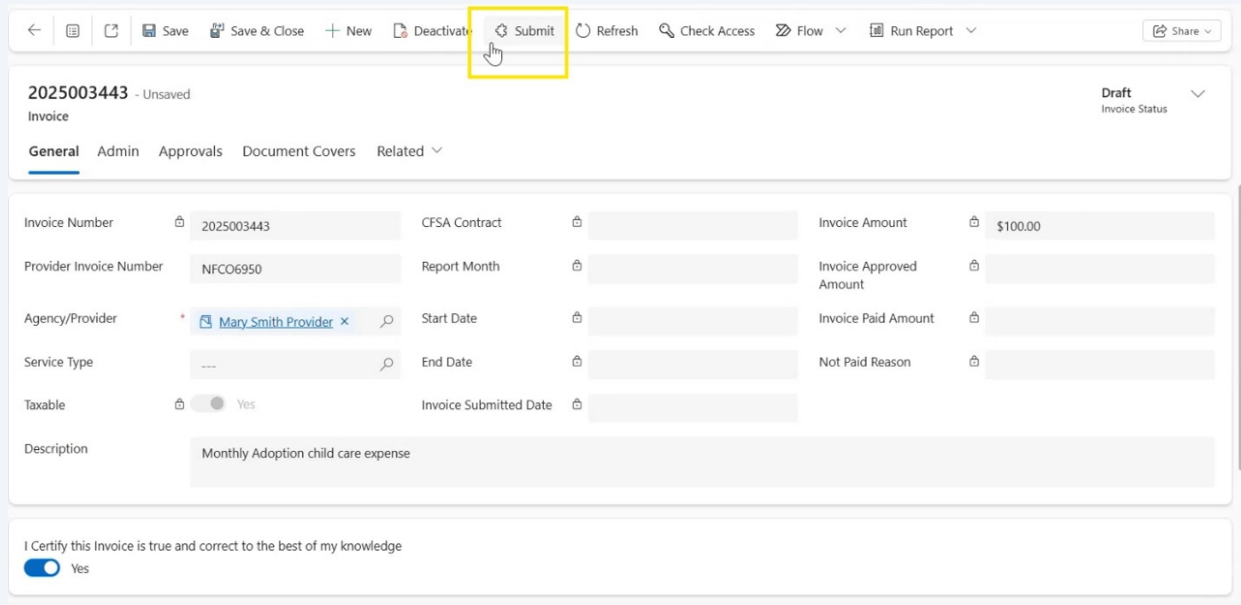
Invoice Lines + New Invoice Line Refresh Flow

<input checked="" type="checkbox"/> Service Log	Child	Service Type	Service/Co...	Service Star...	Service End...	Facility Rate /...	Rate	No. of Units	Invoiced...	Approve...	Reason Sent Back	Comment
---	Lue Miller	Child Care...	Child Care...	6/2/2025	6/19/2025	50.00	\$25.00	---	\$100.00	\$0.00	---	---

Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

27 Hover to the **Action Toolbar** and click **SUBMIT**.

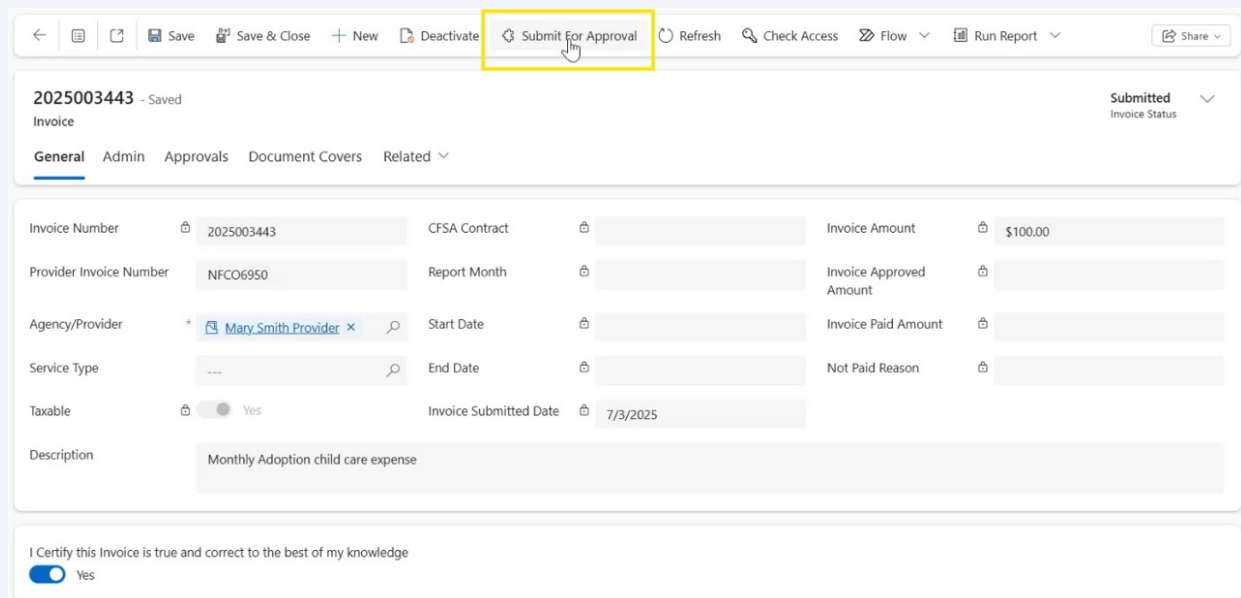


The screenshot shows the '2025003443 - Unsaved Invoice' form. The 'Action Toolbar' at the top contains buttons for Save, Save & Close, New, Deactivate, Submit, Refresh, Check Access, Flow, Run Report, and Share. The 'Submit' button is highlighted with a yellow box and a mouse cursor. The form fields include:

Field	Value
Invoice Number	2025003443
CFSA Contract	
Invoice Amount	\$100.00
Provider Invoice Number	NFCO6950
Report Month	
Invoice Approved Amount	
Agency/Provider	Mary Smith Provider
Start Date	
Invoice Paid Amount	
Service Type	
End Date	
Not Paid Reason	
Taxable	Yes
Invoice Submitted Date	
Description	Monthly Adoption child care expense

I Certify this Invoice is true and correct to the best of my knowledge
☒ Yes

28 Now, Hover to the **Action Toolbar** and click **SUBMIT FOR APPROVAL**.



The screenshot shows the '2025003443 - Saved Invoice' form. The 'Action Toolbar' at the top contains buttons for Save, Save & Close, New, Deactivate, Submit For Approval, Refresh, Check Access, Flow, Run Report, and Share. The 'Submit For Approval' button is highlighted with a yellow box and a mouse cursor. The form fields include:

Field	Value
Invoice Number	2025003443
CFSA Contract	
Invoice Amount	\$100.00
Provider Invoice Number	NFCO6950
Report Month	
Invoice Approved Amount	
Agency/Provider	Mary Smith Provider
Start Date	
Invoice Paid Amount	
Service Type	
End Date	
Not Paid Reason	
Taxable	Yes
Invoice Submitted Date	7/3/2025
Description	Monthly Adoption child care expense

I Certify this Invoice is true and correct to the best of my knowledge
☒ Yes

29

Utilize the magnifying glass in the APPROVER field, and select your Supervisor that you are sending the approval request to.

Quick Create: Approval

Requester: Zaid Ilyas

Approver: Suresh Thandran

Requester Comments: ---

To Be Approved: 2025003443

Buttons: Save and Close, Cancel



Tip! STAAND should default to your direct supervisor, but you have ability to select your supervisor or switch to another via the magnifying glass

30

In the Approval Window, now click **SAVE & CLOSE**.

Quick Create: Approval

Requester: Zaid Ilyas

Approver: Suresh Thandran

Requester Comments: ---

To Be Approved: 2025003443

Buttons: Save and Close, Cancel