

Super Quick Guide for Lead Agency PMs in BHSDSTAR

Please see the User Guides for detailed description of all functionality.

TRACKING



Pending Approval

[View](#)



Pending Payment

[View](#)



Invoice History

[View](#)



RUN REPORTS FOR Invoices

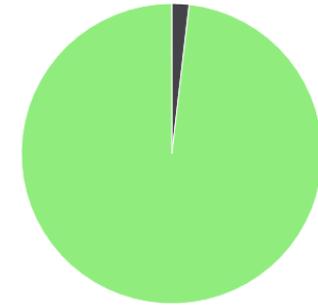
[Run Report -](#)

FY 2017

ALLOCATED	PAID	OUTSTANDING	REMAINING
\$19,614,498.00	\$600.00	\$360,432.78	\$19,253,465.22

Program	Provider Count	Allocated	Paid	Outstanding	Remaining
CCBHC	5	\$254,360.00	\$0.00	\$0.00	\$254,360.00
Forensics	8	\$849,934.00	\$0.00	\$0.00	\$849,934.00
HHRHI	3	\$992,722.00	\$0.00	\$0.00	\$992,722.00
Jail Diversion	4	\$220,205.00	\$0.00	\$0.00	
Native American Services	6	\$285,606.00	\$0.00	\$1,800.00	
Prevention	24	\$2,750,500.00	\$0.00	\$4,611.62	
Psychotropic Medications	6	\$18,065.00	\$0.00	\$0.00	
SAPT Block Grant	5	\$430,000.00	\$0.00	\$0.00	
SBIRT Grant	4	\$915,762.00	\$0.00	\$0.00	
Sexual Assault	5	\$945,000.00	\$0.00	\$0.00	
SGF: Mental Health	12	\$3,651,724.00	\$0.00	\$352,821.16	
SGF: Substance Abuse	15	\$4,325,239.00	\$0.00	\$0.00	
Suicide Prevention	4	\$337,250.00	\$0.00	\$0.00	
Supportive Housing	20	\$2,499,442.00	\$0.00	\$0.00	
TCA: All Services	5	\$359,661.00	\$0.00	\$0.00	\$359,661.00
Veterans and Families	8	\$779,028.00	\$600.00	\$1,200.00	\$777,228.00

Funding Summary



■ Paid
■ Outstanding
■ Remaining

Highcharts.com

STAFF ACCESS:

Stanton, Heather
 heather.stanton@state.nm.us
 Financial Provider Read Only

Tari, Mika

This table displays a list of current programs.

Click on any program to see a list of providers participating in the program.

TRACKING



Pending Approval

[View](#)



Pending Payment

[View](#)



Invoice History

[View](#)



RUN REPORTS FOR
Invoices

[Run Report](#)

We created a new Tracking module to help you manage invoices.

The number of invoices at any state of the process is displayed in the orange circle on their respective tile.

Pending Approval are those invoices awaiting approval by the Lead Agency.

Pending Payment are those invoices awaiting payment by you.

Invoice History includes all invoices that have been either paid or denied.

INVOICE COUNT	TOTAL AMOUNT
1	\$600.00

Program	Project	Invoice Details	Invoice	Fund	Fiscal Year	Payor	Activity Dates	Amount	Last Action Taken
Veterans and Families	Veterans and Families Support Services	EQUINE THERAPEUTIC CONNECTIONS Jackie Nielsen	1492163VMS	B700 - SGF	FY 17	OHNM - Payor	Jul, 2016	\$600.00 on 07/16/2016	 Debby Trimarchi 07/21/2016

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Those under 'Invoice History' will display all the invoices in either the Paid or the Denied tab.

Program All	Project All	Site All	Fiscal Year 2017	Status Pending Payment	Invoice Number				
AWAITING ACTION (0) IN REVIEW (3) ADMINISTRATIVE HOLD (0)									
INVOICE COUNT		TOTAL AMOUNT							
0		\$0.00							
Program	Project	Invoice Details	Invoice	Fund	Fiscal Year	Payor	Activity Dates	Amount	Last Action Taken
No data available in table									

Clicking View for Pending Payment, will take you to the Invoice List page.

The top bar allows you to adjust criteria that controls the information displayed on the list. Once here, you can make any criteria changes to view any of the invoices currently in your system.

There are three tabs for invoices in the 'Pending Payment' state:

Awaiting Action

In Review

Administrative Hold

Each tab has a number indicating the number of invoices in each state. Click on one of these tabs to see invoices listed under the tab.

Program All	Project All	Site All	Fiscal Year 2017	Status Pending Approval	Invoice Number
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AWAITING ACTION (2) IN REVIEW (0) ADMINISTRATIVE HOLD (0)

INVOICE COUNT	TOTAL AMOUNT
2	\$1,099.00

Program	Project	Invoice Details	Invoice	Fund	Fiscal Year	Payor	Activity Dates	Amount	Last Action Taken
SAPT Block Grant	SAPT Block Grant	The Life Link - 0000316084 Adam Gabaldon	STAR-BHS 001 435	B800 - Federal	FY 17	OHNM - Payor	Jul, 2016	\$999.00 on 07/31/2016	 sys admin 07/31/2016
Suicide Prevention	Suicide Prevention	Esperanza Guidance Services, Inc. Jackie Nielsen	STAR-BHS 001 434	BE30 - Federal	FY 17	OHNM - Payor	Jul, 2016	\$100.00 on 07/30/2016	 sys admin 07/30/2016

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Clicking view for ‘Pending Approval’ will display all the invoices requiring your attention or action.

The top bar allows you to adjust criteria that controls the information displayed on the list. Once here, you can make any criteria changes to view any of the invoices currently in your system.

There are three tabs for invoices in the ‘Pending Payment’ state:

- Awaiting Action
- In Review
- Administrative Hold

Each tab has a number indicating the number of invoices in each state. Click on one of these tabs to see invoices listed under the tab.

Program All	Project All	Site All	Fiscal Year 2017	Status Pending Approval	Invoice Number
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AWAITING ACTION (2) IN REVIEW (0) ADMINISTRATIVE HOLD (0)

INVOICE COUNT	TOTAL AMOUNT
2	\$1,099.00

Program	Project	Invoice Details	Invoice	Fund	Fiscal Year	Payor	Activity Dates	Amount	Last Action Taken
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During the transition in fiscal years, it will be necessary to view different fiscal years to complete action on outstanding invoices.

Change the fiscal year using the criteria row at the top of the page.

STAR-BHS 001 435

\$999.00

- ✓ -- Select --
- Provider corrections required
- Approved by the lead agency
- Placed on administrative hold
- In review
- Denied by the lead agency

Provider Site

The Life Link - 0000316084

Comments:[Add Comment](#)**Invoice Date / Period / Fiscal Year**

7/31/2016; Jul, 2016 - Jul, 2016; FY17

Project Manager

Adam Gabaldon

Fund Source

B800 : SAPT Block Grant

Provider Uploaded Files[dailyscreeningresultsLOG AND_INSTRUCTIONS6.xls](#)[SBIRT - Universal Prescreen.pdf](#)

PDF



Activity Report

Service Date(s)	Service	Staff	Created	Total
07/01/2016 - 07/31/2016	Workbook Upload	Mindy Hale (Audit)	07/31/2016	\$999.00

To take action on an invoice, click on the provider's name under Invoice detail. Doing so opens the Invoice details.

Take action by clicking on the drop down Action box.

AWAITING ACTION (2)		IN REVIEW (3)		ADMINISTRATIVE HOLD (0)			
INVOICE COUNT			TOTAL AMOUNT				
2			\$124,210.58				
Program	Project	Invoice Details	Invoice	Fund	Fiscal Year	Payor	Activity
Native American Services	Native American Services	HOZHO CENTER FOR PERSONAL ENHANCEMENT Barbara Alvarez					
SGF: Mental Health	SGF: Mental Health	Falling Colors Technology - 0000306509					

 Cindy Romero
 Jul 21, 2016
Please label the uploaded files FY17 not FY16

 Cindy Romero
 Jul 12, 2016
Incorrect, please correct or delete per e-mail. Thank you

On the invoice list, if you see a comment icon (), click on it to quickly see any comments entered on this invoice. Click it again to close the comments.