AR-15 Approve Invoice Adjustments

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to Approve Invoice Adjustments in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers how to Approve Invoice Adjustments in NCFS.

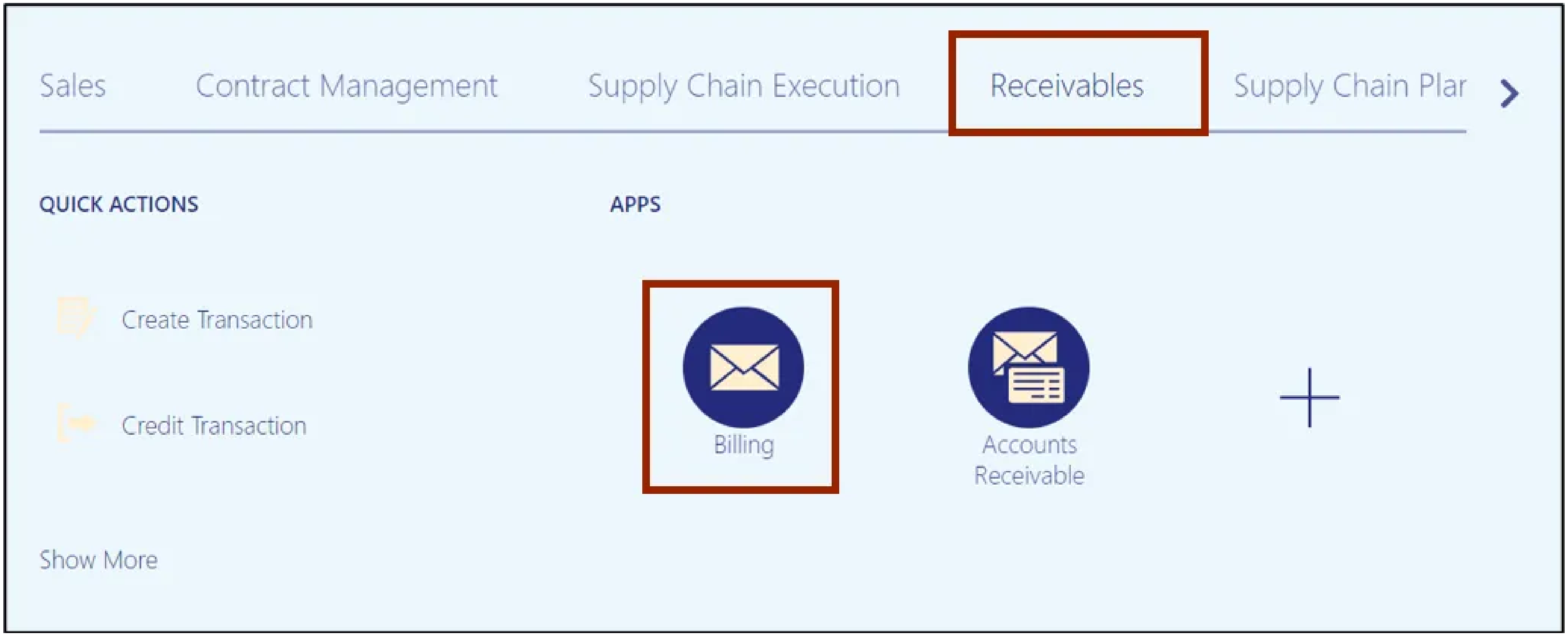
Approve Invoice Adjustments

To Approve Invoice Adjustment, please follow the steps below. There are 10 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

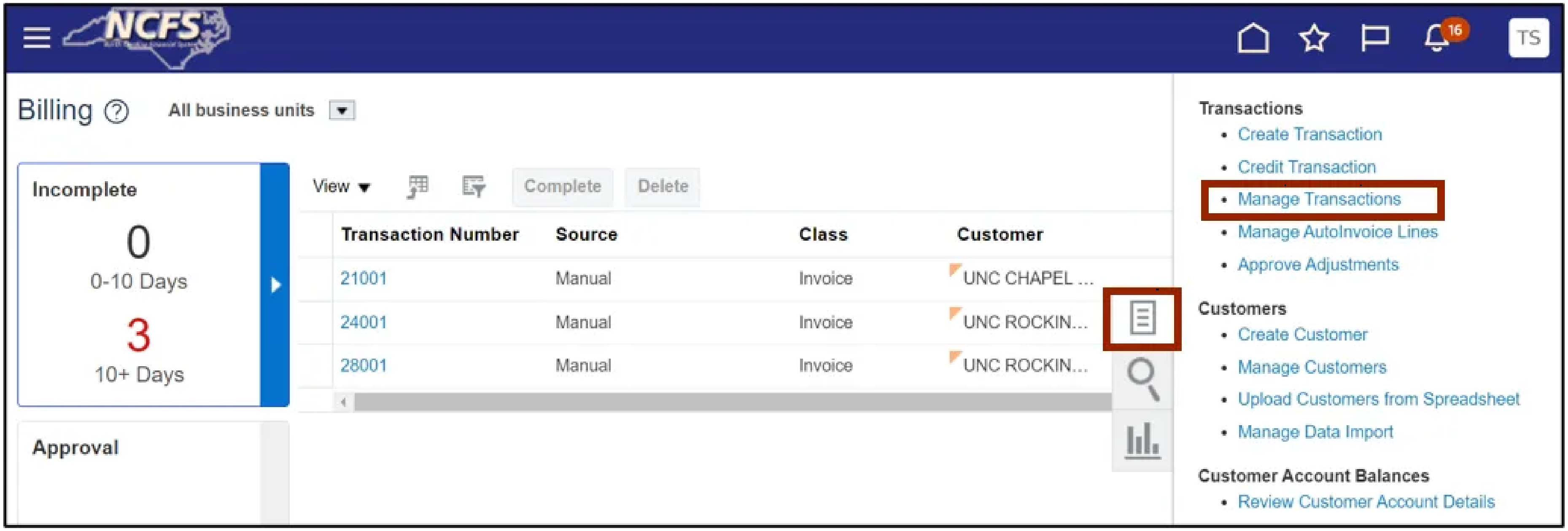
Step 2. On the **Home** page, click the **Receivables** tab and click the **Billing** app.

Image



Step 3. On the **Billing** page, click the **Tasks** icon and click **Manage Transactions**.

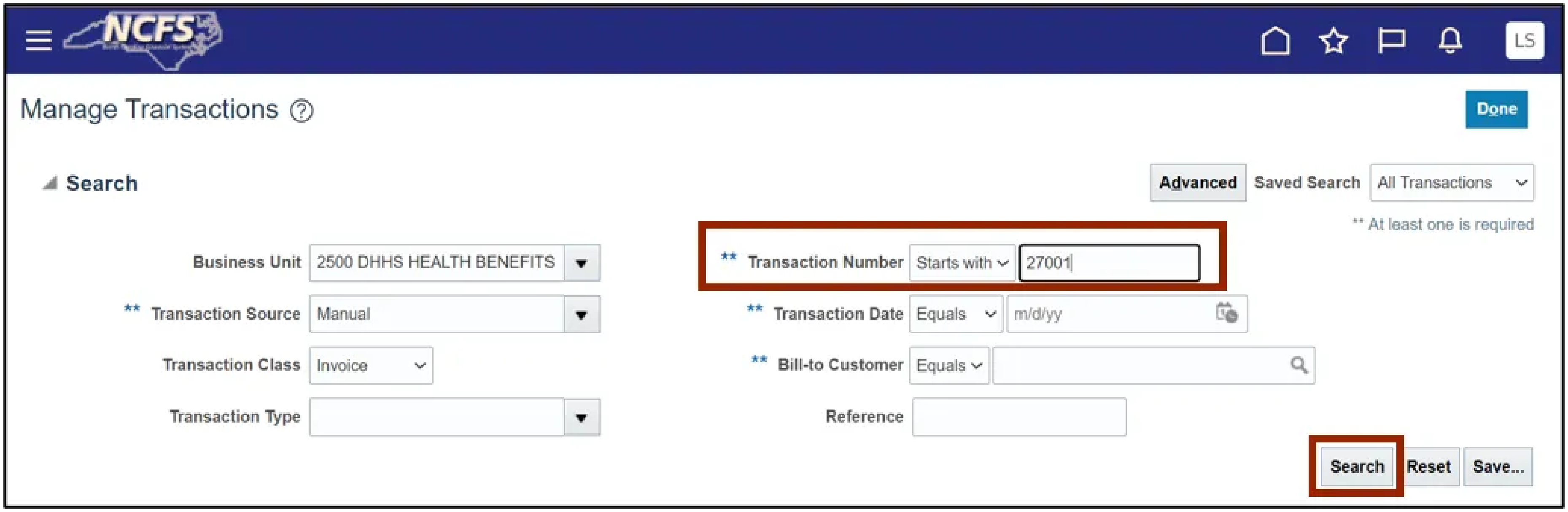
Image



Step 4. On the **Manage Transactions** page, enter the ***Transaction Number*** and click the **Search** button.

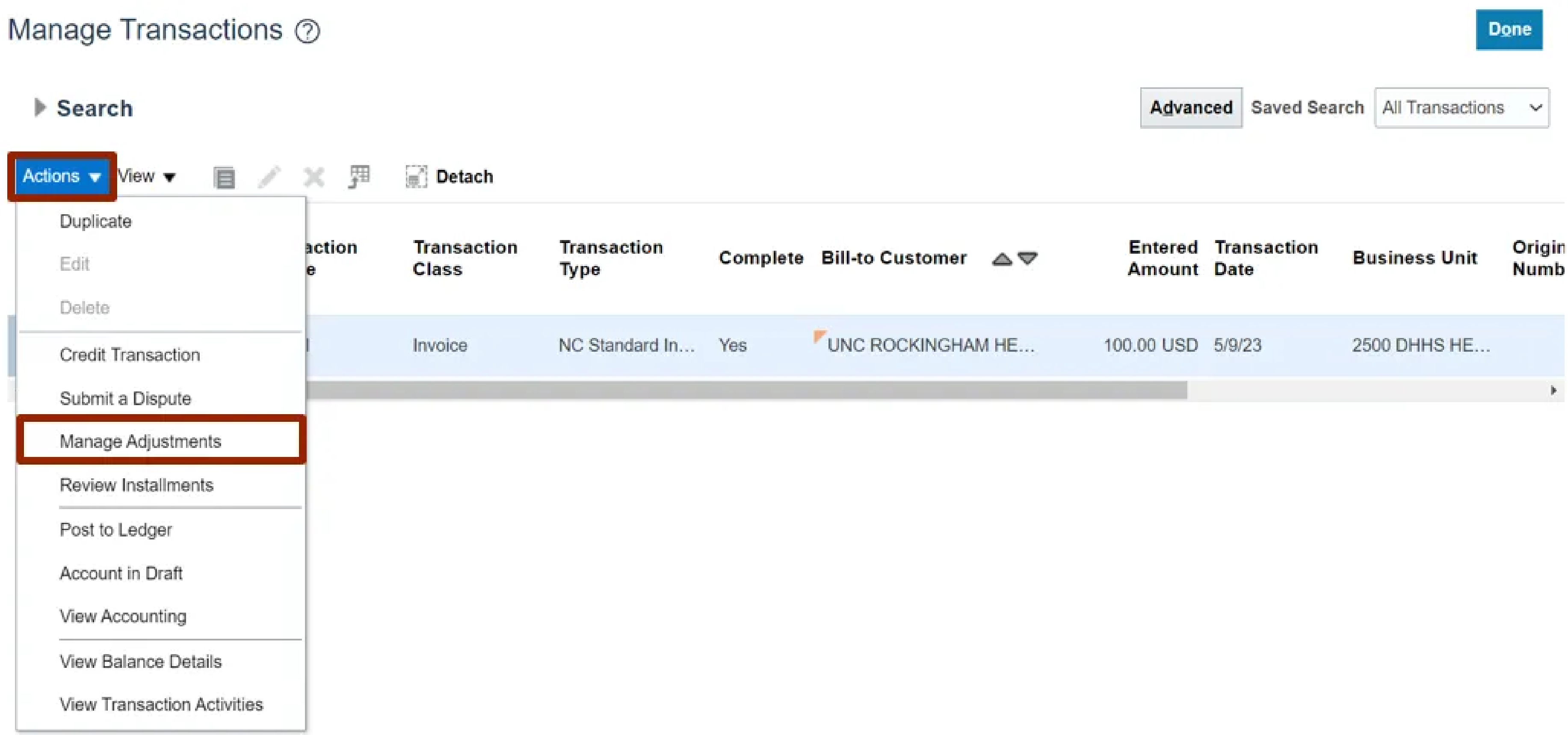
In this example, we choose **27001**.

Image



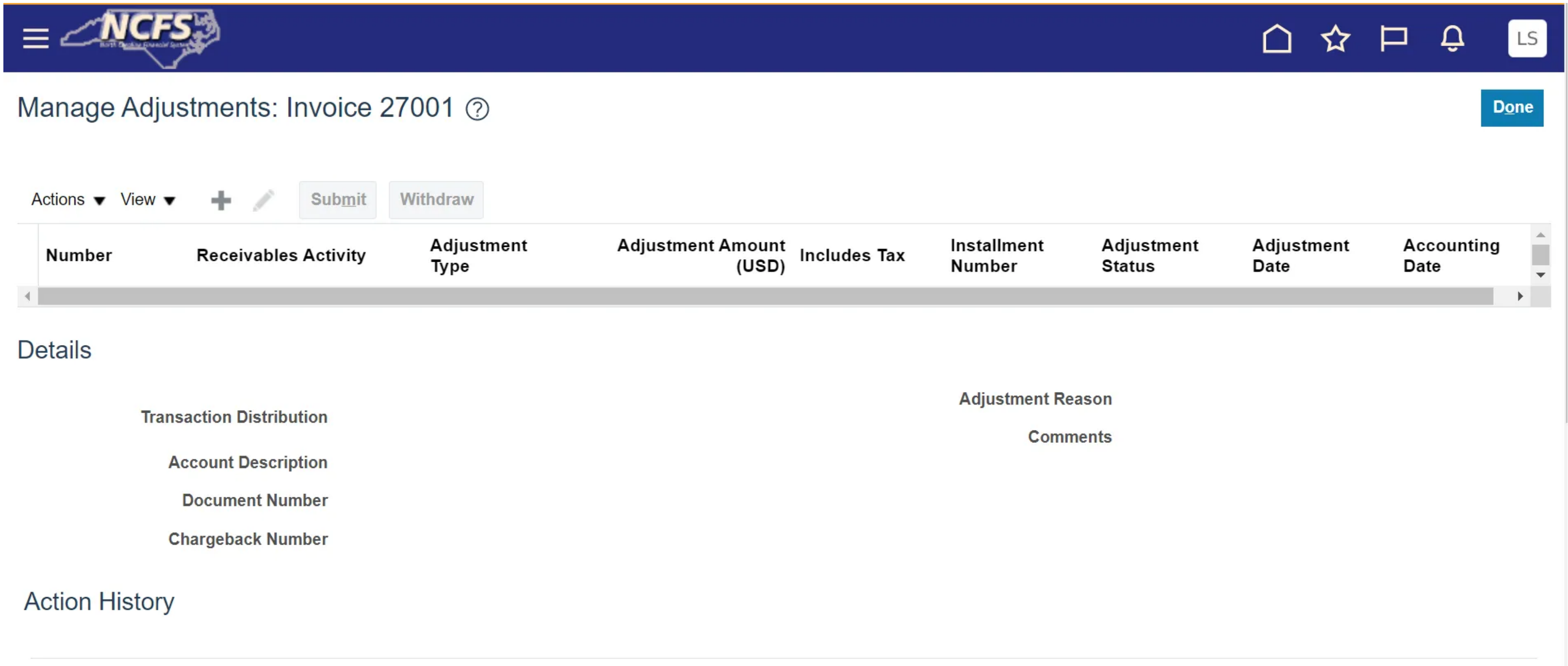
Step 5. The **Manage Transactions** page opens. On the **Manage Transactions** page, click the *Actions* drop-down choice list and click the **Manage Adjustments** option.

Image



Step 6. On the **Manage Adjustments** page, click the **Create** icon to make an addition.

Image

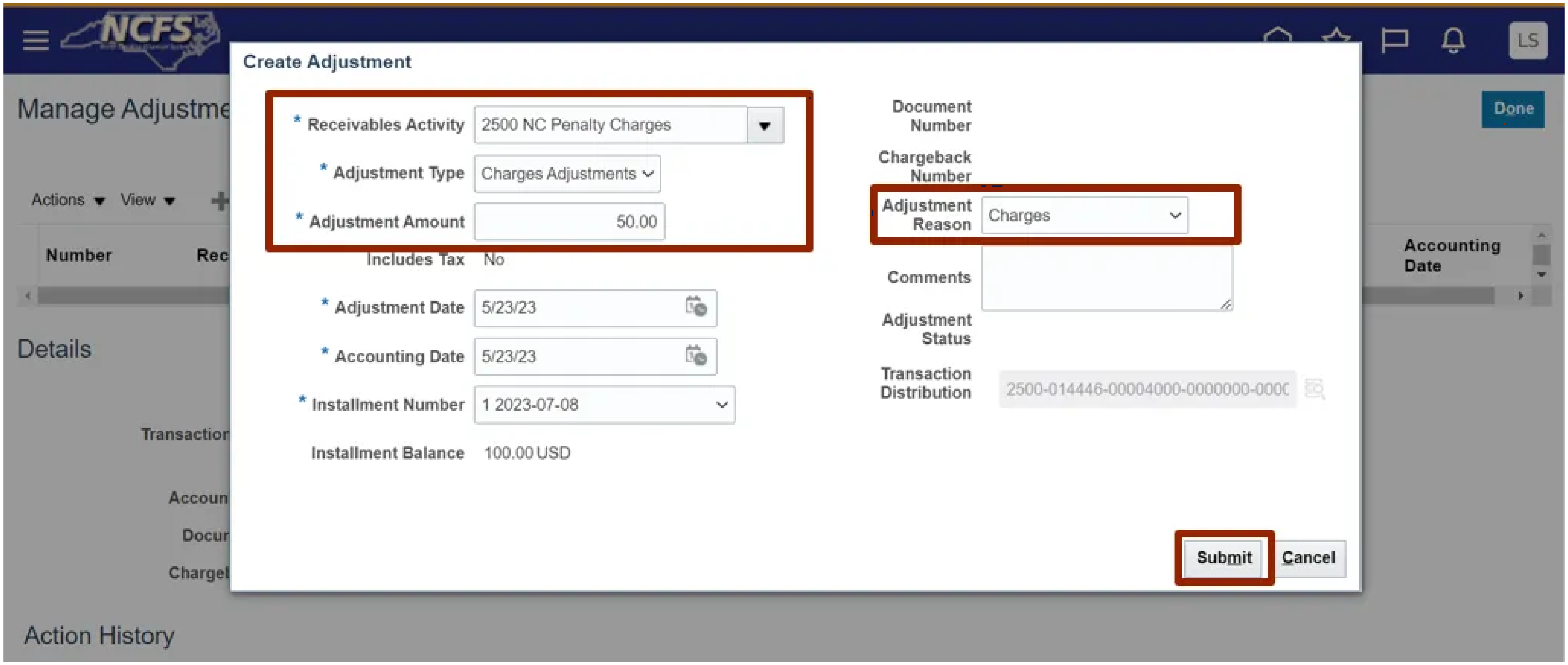


Step 7. The *Create Adjustment* pop-up appears. Enter the relevant information and click the **Submit** button.

In this example, we choose:

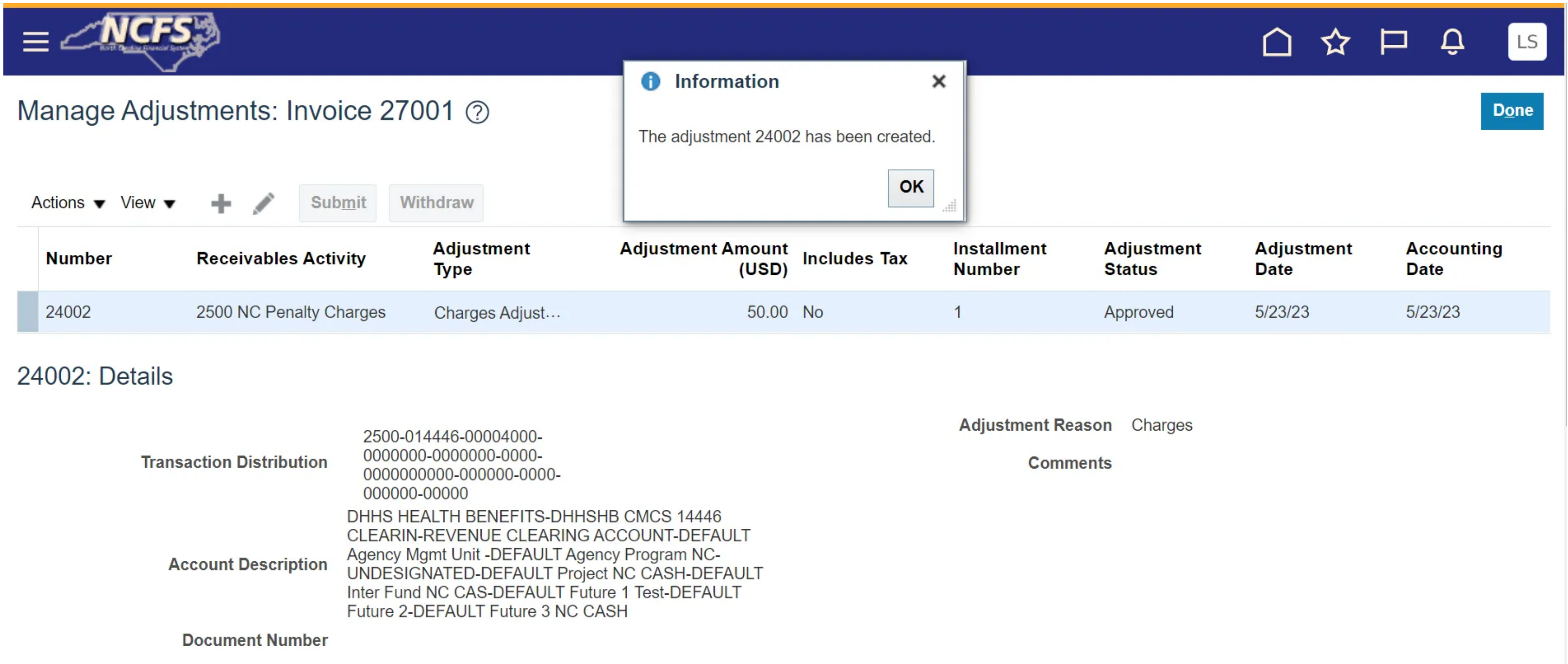
- ***Receivables Activity*: 2500 NC Penalty Charges**
- ***Adjustment Type*: Charges Adjustments**
- ***Adjustment Amount*: 50**
- ***Adjustment Reason*: Charges**

Image



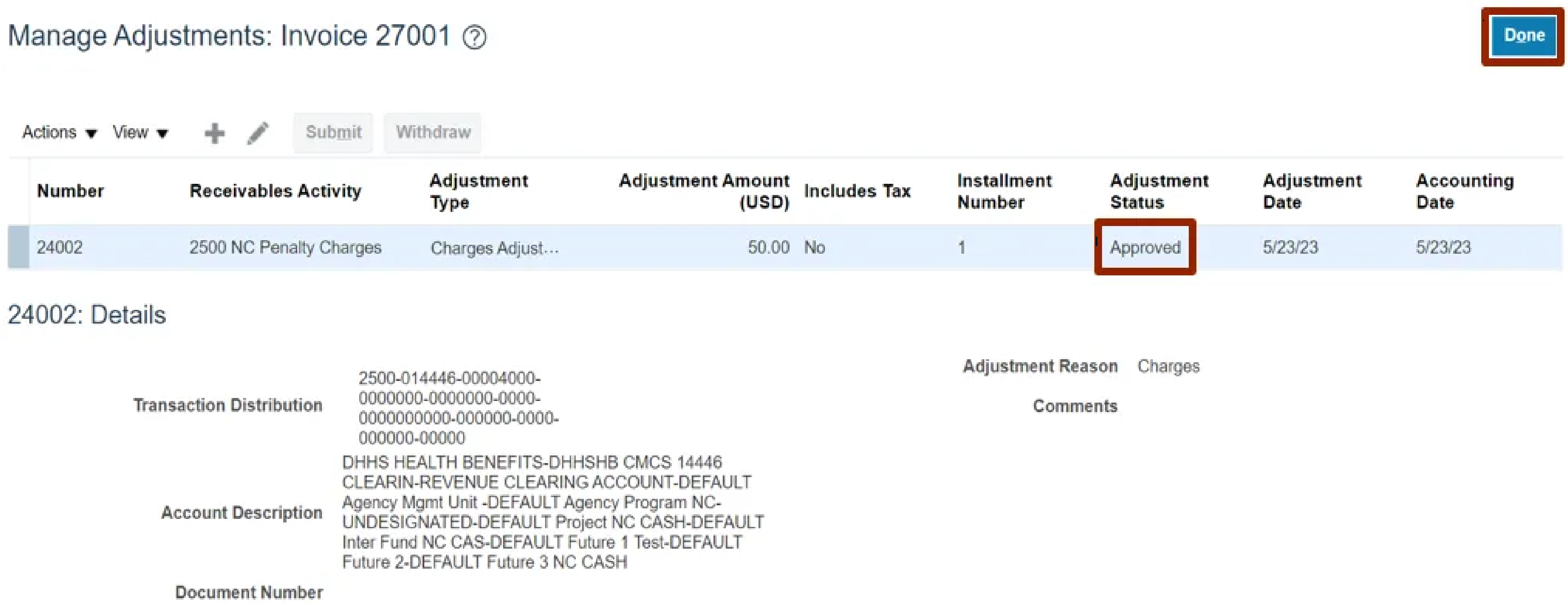
Step 8. The *Information* pop-up appears. Click the **OK** button.

Image



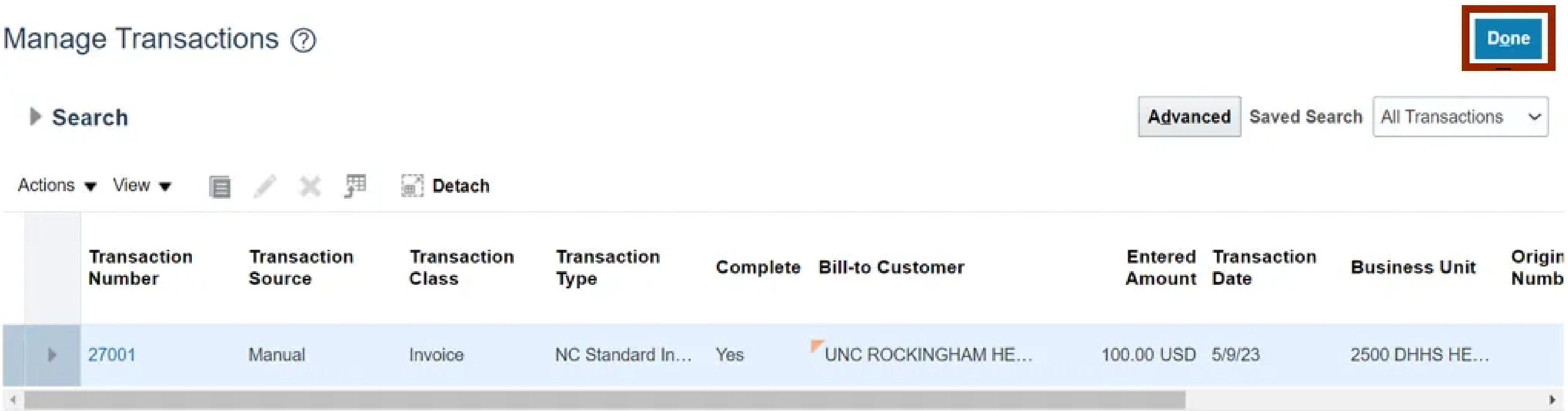
Step 9. Invoice Adjustment is auto approved in NCFS; hence Adjustment status is **Approved**. Click the **Done** button.

Image



Step 10. On the **Manage Transactions** page, click the **Done** button.

Image



Wrap-Up

Invoice Adjustments are auto approved in NCFS. User needs approval limits defined for adjustments and any adjustment created by the user will be auto approved as shown in above steps.

Additional Resources

- Instructor Led-Trainings (ILT)
  - AR104: Invoice Management for DHHS

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