



Approving Invoices in PPL@Home for Associations

Walk-Me Guide | California SDP



To perform approve Invoices on behalf of your participant, there is a simple process to navigate to their profile and perform the action of approving the Invoice.

1

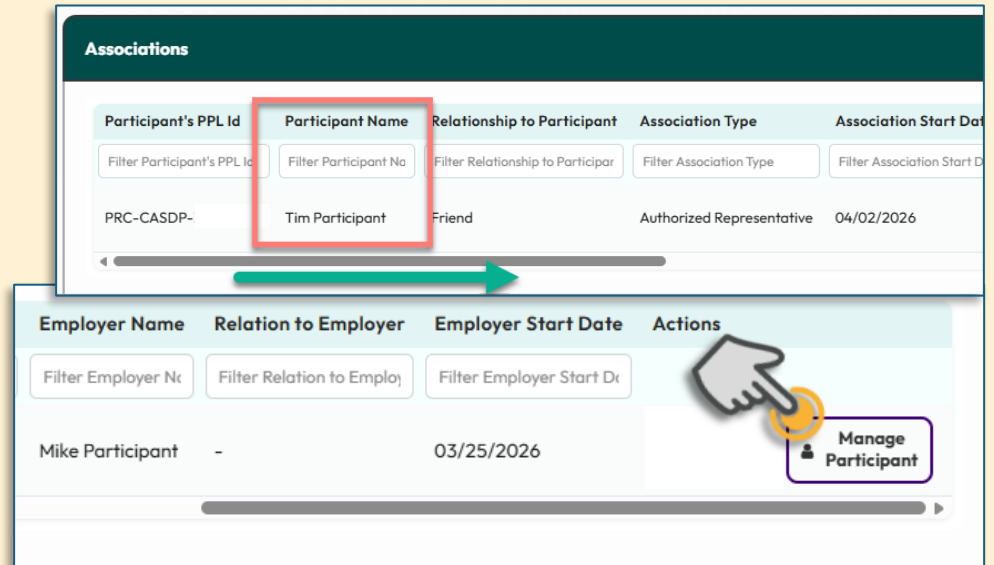
After logging into PPL@Home, click on the **Associated Participants** tab.



2

Under the **'Associations accordion menu'**, choose the participant.

Scroll to the right of their information line and select the **'Manage Participant'** button.

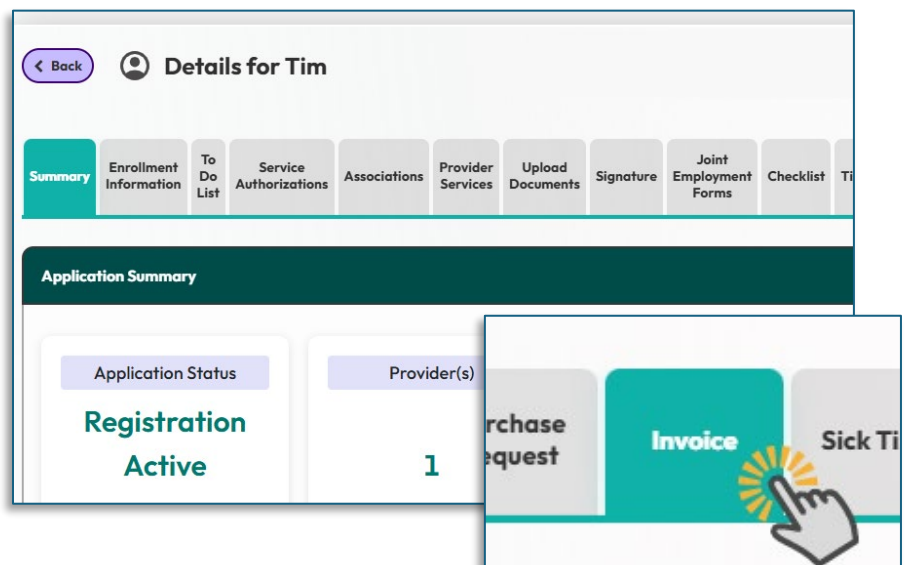


The Manage Participant button will only show if you are in Paperwork Complete status with all required forms and documentation completed.

3

You will see the Participant's PPL@Home view. You can complete actions for the Participant.

Select the **Invoice** tab to continue.

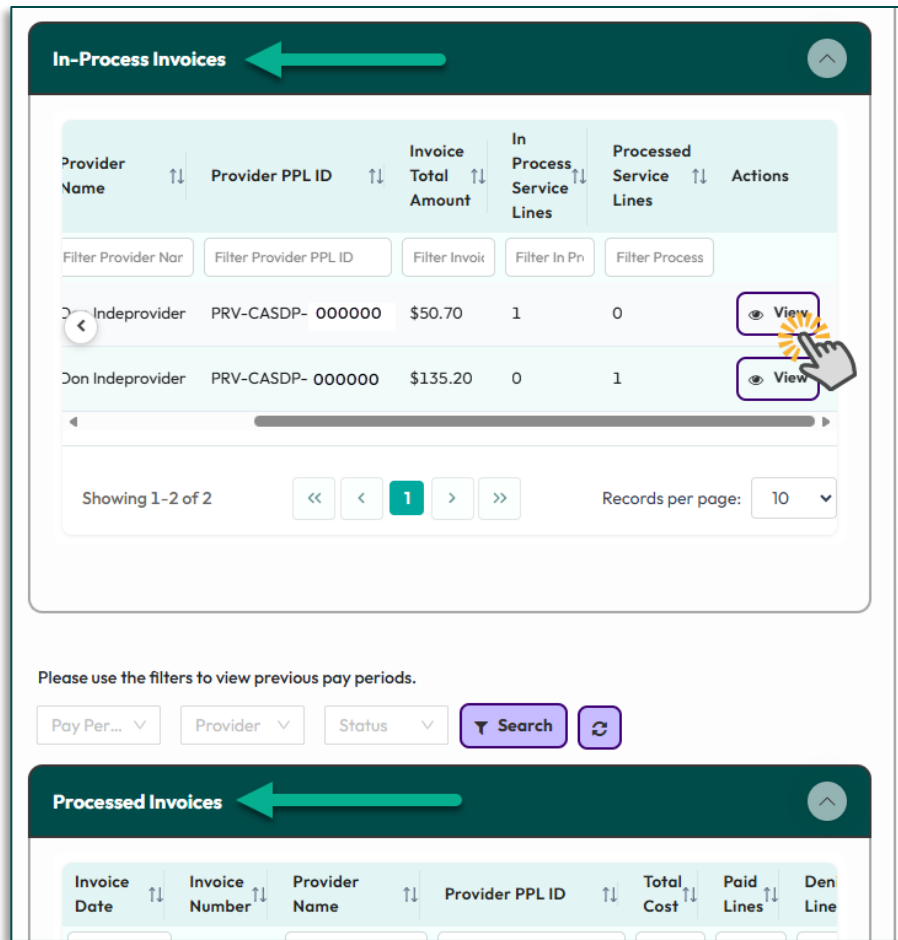


4

You will see several dark green accordion menus. Click on the **dark green title bars** to expand or collapse each accordion menu. Clicking the **'Invoice Summary'** accordion shows two menus:

- **'In Process Invoice'** shows any submitted invoices that need your approval, or that have been approved but not paid.
- **'Processed Invoice'** shows any invoices that have been paid.

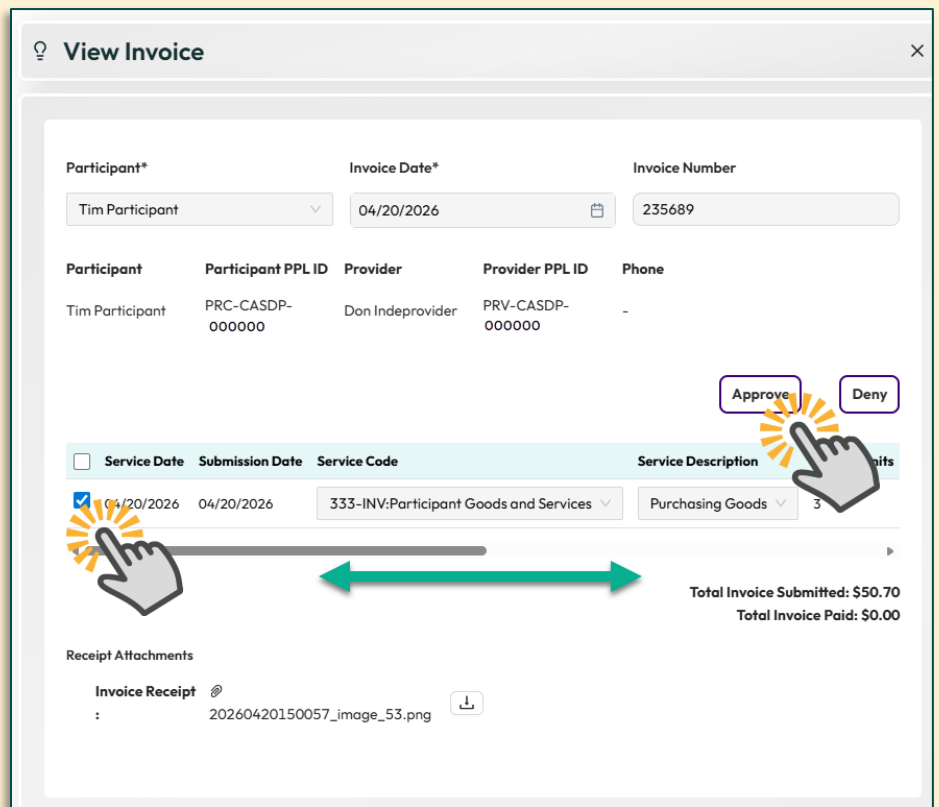
Find an invoice that has 'In Process Service Lines' and click the **'View'** button under the Actions column.



5

Review the information on the invoice. You may need to use the grey scroll bar to see all the information.

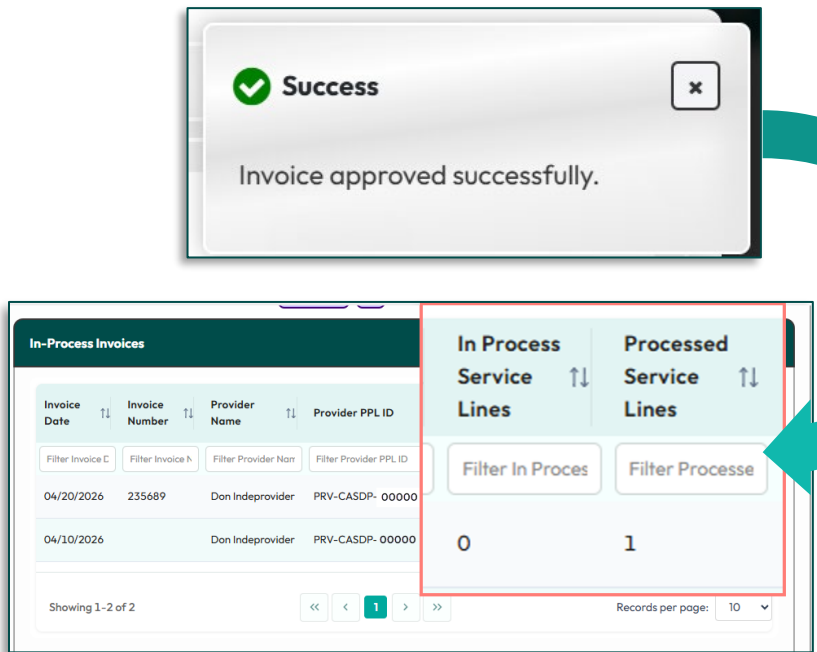
To approve an invoice, select the checkbox of each line you want to approve, then select the **'Approve'** button.



6

You will see a pop up stating the invoice was approved successfully.

On the invoice line, the 'In Process Service Lines' and 'Processed Service Lines' show the totals for approval/denial statuses.



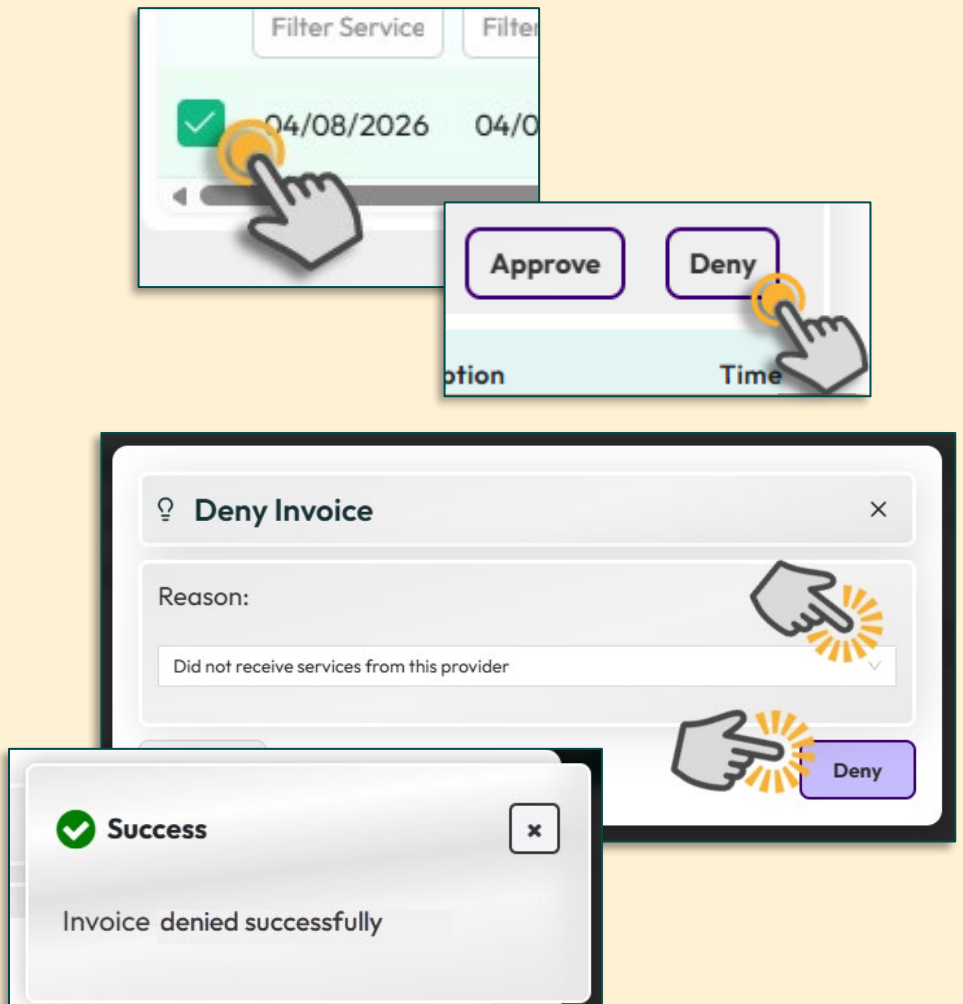
7

To deny an invoice, check the box for each line you want to deny, then select the 'Deny' button.

You will then select a denial reason from the drop-down. Then, click the purple 'Deny' button.

You will see a pop up stating the invoice was denied successfully.

On the invoice line, the 'In Process Service Lines' and 'Processed Service Lines' show the totals for approval/denial statuses.



If you deny an invoice, it will be sent back to with the denial reason. The contractor or vendor must create a new, corrected invoice from scratch and then resubmit for approval.

Call or email your Support Broker or Enrollment Specialist if you have any questions.



YOUR LIFE
YOUR CARE
YOUR PEOPLE