



CALIFORNIA
Hub & Spoke
SYSTEM

Invoicing Webinar

Welcome SOR3 Hub and Spoke | 3/29/23



Housekeeping



Join by phone: Click Join Audio, Phone Call tab, dial the desired phone number, and enter Meeting ID & Participant ID.

01



Cameras: Please keep your cameras on unless you have low bandwidth.

02



Name: Please change your name to your actual name.

03



Chat: Click the Chat icon to open the Chat panel.

04



Reactions: Located on bottom toolbar.

05



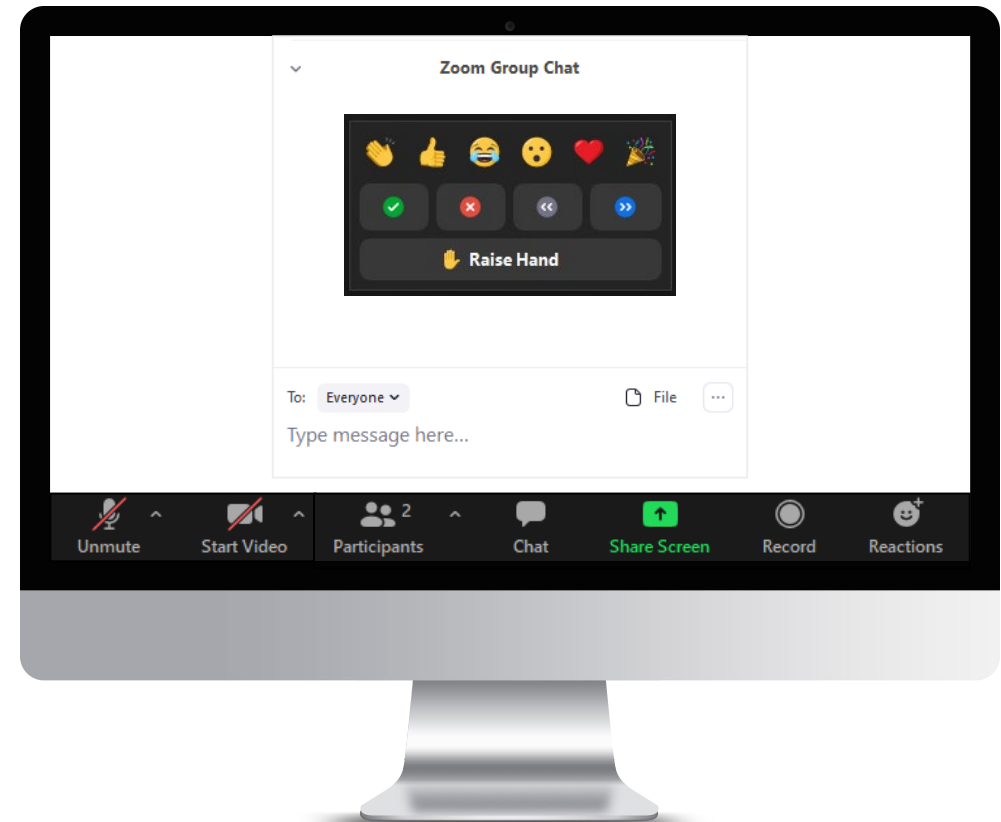
Full-screen: Double click to toggle.

06



Need help? Type in the Chat box!

07





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Welcome SOR3 Hub and Spoke | 3/29/23





Meet your Grantee Liaison

Doveina has a Master's of Social Work and worked in the professional helping field, including with substance use issues for around 10 years. She served as supervisor and provider increasing access to and improving quality of behavioral health services along with medication assisted treatment for vulnerable populations in southern California. She lives in sunny San Diego.

Contracts and Invoicing Updates for Y1Q1

01

Presently the grantee contract is with DHCS for approval

02

All grantee Statements of Work (SOW) have gone out to sites

03

SOW is filled out by Grantee site - many have already been returned

04

Once returned to AHP SOWs are reviewed and approved

05

The approved SOW is sent to Contract Dept.

08

Invoice for Year 1 Quarter 1 (Y1Q1) can be generated and sent to AHP
ap2@ahpnet.com for payment

07

Site returns signed Contract to AHP

06

SOR3 Contract is sent to site for review and signature. (expected in the next few weeks)





Meet your Accountant



Linda McCarthy is a Project Accountant in the Finance Department at Advocates for Human Potential and has over 25 years of experience in project accounting. Linda has worked at AHP for over 5 years and provides training to users of the company accounting system. Her project portfolio history at AHP has included serving as the Project Accountant on the CA Hub and Spoke SORII project (2020-2022). In this role, Linda provided contract development and monitoring; budget and forecasting management; and subcontractor invoice review, approval, and payment. Linda will continue this role in support of the CA Hub and Spoke SOR III project



IMPORTANT - Unique Site I.D

01  **Very Important to always use your Unique site ID.**

02  **Where to find your unique site ID**

  **Email with SOW**

  **On the top of filled out SOW**

  **GPRA handbook**

  **On contract**

Hub & Spoke Quarterly Deliverables Invoice

Scan to PDF & email completed invoice to:
lmccarthy@ahpnet.com - Linda McCarthy

- Payment terms are 30 days from AHP's receipt & approval of the Invoice, unless otherwise specified in your Consulting Agreement.
- Invoices received more than 15 days after completion of services may not be eligible for payment.
- No invoice will be approved for payment if AHP does not have your executed Subcontractor Agreement and signed W-9 on file.
- Signature and Date

Advocates For Human Potential, Inc.
 Hub and Spoke SOR3 Subcontractor Quarterly Deliverables Invoice
 (01/01/2023-06/30/2024)

NAME:				
ADDRESS:				
CITY:		STATE:	ZIP:	
TEL. #:		EMAIL:		
Project #:		7545.01.003 (CA Hub & Spoke SOR3 Subcontractors)		
Unique GPRA Site Identifier:				

For description of deliverable services, refer to the Statement of Work included in your Subcontractor Agreement.

Quarter #/Date Range (e.g.: Qtr 1: 01/01-03/31/2023)	Deliverable Description	Deliverable Amount (per contract)
Quarter: Dates:	Equipment (Itemized list of purchases, if budgeted in contract): Quarterly Deliverables:	\$ \$
Total Amount Due:		\$

By signing below, Consultant certifies this is a true and correct report of the performance of services for Advocates for Human Potential, Inc., in accordance with the terms of the Agreement between the parties.

Invoicing Steps

1. Complete the top portion of the invoice with your agency name, address, phone number, submitters name & email.



Advocates For Human Potential, Inc.
Hub and Spoke SOR3 Subcontractor Quarterly Deliverables Invoice
 (01/01/2023-06/30/2024)

NAME:				
ADDRESS:				
CITY:		STATE:	ZIP:	
TEL. #:		EMAIL:		
Project #:		7545.01.003 (CA Hub & Spoke SOR3 Subcontractors)		
Unique GPRA Site Identifier:				

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Quarter #/Date Range <small>(e.g.: Qtr 1: 01/01-03/31/2023)</small>	Deliverable Description	Deliverable Amount <small>(per contract)</small>
Quarter: Dates:	Equipment (Itemized list of purchases, if budgeted in contract): Quarterly Deliverables:	\$ \$
Total Amount Due:		\$

By signing below, Consultant certifies this is a true and correct report of the performance of services for Advocates for Human Potential, Inc., in accordance with the terms of the Agreement between the parties.

Subcontractor Signature

Date

Scan to PDF & email completed invoice & report to:
ap2@ahpnet.com

Payment terms are 30 days from AHP's receipt & approval of the Invoice, unless otherwise specified in your Consulting Agreement.

Invoices received more than 30 days after completion of services may not be eligible for payment.

No invoice will be approved for payment if AHP does not have your executed Subcontractor Agreement and signed W-9 on file.

Equipment Receipts Submission

If you have an equipment budget

2. Fill out Equipment.

- Please highlight receipt to easily identify purchases.
- Equipment totals must match exactly what is stated on your receipt.
- If you are only billing part of an equipment purchase to this project, please note on the receipt how much is being billed.
 - **Example:** If there are 25 laptops purchased but only 3 are for MAT, please note that on the receipt, with the total for those 3 laptops.
- Only include items you bought that quarter in the Equipment section.
- Any unspent equipment amounts can be carried over into the next quarter. There is no budget modification necessary when doing this.
- **Please send ONE PDF** with all attachments(invoice form + receipts) accounts payable. DO NOT send invoice and receipts separately.

Advocates For Human Potential, Inc.
Hub and Spoke SOR3 Subcontractor Quarterly Deliverables Invoice
(01/01/2023-06/30/2024)

NAME:				
ADDRESS:				
CITY:		STATE:	ZIP:	
TEL. #:		EMAIL:		
Project #:		7545.01.003 (CA Hub & Spoke SOR3 Subcontractors)		
Unique GPRA Site Identifier:				

For description of deliverable services, refer to the Statement of Work included in your Subcontractor Agreement.

Quarter #/Date Range (e.g.: Qtr 1: 01/01-03/31/2023)	Deliverable Description	Deliverable Amount (per contract)
Quarter: Dates:	Equipment (Itemized list of purchases, if budgeted in contract): Quarterly Deliverables:	\$ \$
Total Amount Due:		\$

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Subcontractor Signature

Date

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ap2@ahpnet.com

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Invoice Form

Optional:

Please attach a detailed description of all activities completed for the quarterly deliverable in a separate document along with your invoice.

Advocates For Human Potential, Inc.
Hub and Spoke SOR3 Subcontractor Quarterly Deliverables Invoice
(01/01/2023-06/30/2024)

NAME:			
ADDRESS:			
CITY:	STATE:	ZIP:	
TEL. #:	EMAIL:		
Project #:	7545.01.003 (CA Hub & Spoke SOR3 Subcontractors)		
Unique GPRA Site Identifier:			

For description of deliverable services, refer to the Statement of Work included in your Subcontractor Agreement.

Quarter #/Date Range <small>(e.g.: Q1, 1/01/01-03/31/2023)</small>	Deliverable Description	Deliverable Amount <small>(per contract)</small>
Quarter: Dates:	Equipment (Itemized list of purchases, if budgeted in contract): Quarterly Deliverables:	\$ \$
Total Amount Due:		\$

By signing below, Consultant certifies this is a true and correct report of the performance of services for Advocates for Human Potential, Inc., in accordance with the terms of the Agreement between the parties.

Subcontractor Signature

Date

Scan to PDF & email completed invoice & report to:
ap2@ahpnet.com

Payment terms are 30 days from AHP's receipt & approval of the Invoice, unless otherwise specified in your Consulting Agreement.

Invoices received more than 30 days after completion of services may not be eligible for payment.

No invoice will be approved for payment if AHP does not have your executed Subcontractor Agreement and signed W-9 on file.

Unique Site ID refers to the series of letters and number corresponding to your site (e.g., HSSNAY02).

For Deliverable Description box, use the text in the deliverable description in your final executed contract's Statement of Work that corresponds with the Quarter you are invoicing for.

Quarterly deliverable amounts are a fixed total. Amounts listed match what is in your Statement of Work and quarterly payment schedule.

Advocates For Human Potential, Inc.
Hub and Spoke SOR3 Subcontractor Quarterly Deliverables Invoice
(01/01/2023-06/30/2024)

NAME:	ABC Clinic				
ADDRESS:	1234 Main Street				
CITY:	Anytown	STATE:	CA	ZIP:	01234
TEL. #:	123-456-7890	EMAIL:	lsmith@ABCclinic.org		
Project #:	7545.01.003 (CA Hub & Spoke SOR3 Subcontractors)				
Unique GPRA Site Identifier:	HSSABC1				

For description of deliverable services, refer to the Statement of Work included in your Subcontractor Agreement.

Quarter #/Date Range (e.g.: Qtr 1: 01/01-03/31/2023)	Deliverable Description	Deliverable Amount (per contract)
Quarter: 1 Dates: 01/01/23-03/31/23	Equipment (Itemized list of purchases, if budgeted in contract): 2 laptops at \$425 each = \$850 1 desk at \$400	\$ 1,250.00
	Quarterly Deliverables: Tailored Implementation Plan • Develop Implementation Plan utilizing templates provided by AHP. Submit to AHP for approval. Equipment Cost (if applicable)	\$ 55,000.00
	Treatment and Recovery Services: • Deliver direct Treatment and Recovery Services to patients utilizing Medication Assisted Treatment (MAT). • Collect GPRA data.	
	Participation in Technical Assistance and Training (TTA) • Learning Collaborative Sessions • Participate in online regional and statewide Learning Collaborative sessions on a minimum quarterly basis; session schedule to be provided by AHP. • One staff member shall attend the quarterly Learning Collaborative. • Coaching Calls, Webinars/Trainings, and Site Visits • One staff member shall participate in regional coaching calls each quarter. • One staff member shall attend a minimum of one webinar each quarter.	
	Reporting- Year 1 Quarter 1 (Y1Q1) • Subcontractor shall participate in data collection, and submission quarterly. • Submit ongoing GPRA evaluations throughout quarter. • Submit data to AHP's online portal when the portal is developed, or as directed by AHP. • Submit data to UCLA iRAP data portal.	
Total Amount Due:		\$ 56,250.00

Recommendation

Quarterly Deliverables:
Cut and paste
deliverables from SOW.

Total Invoice

Make sure invoice is signed and dated.

By signing below, Consultant certifies this is a true and correct report of the performance of services for Advocates for Human Potential, Inc., in accordance with the terms of the Agreement between the parties.

Lisa Smith
Subcontractor Signature

04/07/2023
Date

Scan to PDF & email completed invoice & report to:
ap2@ahpnet.com

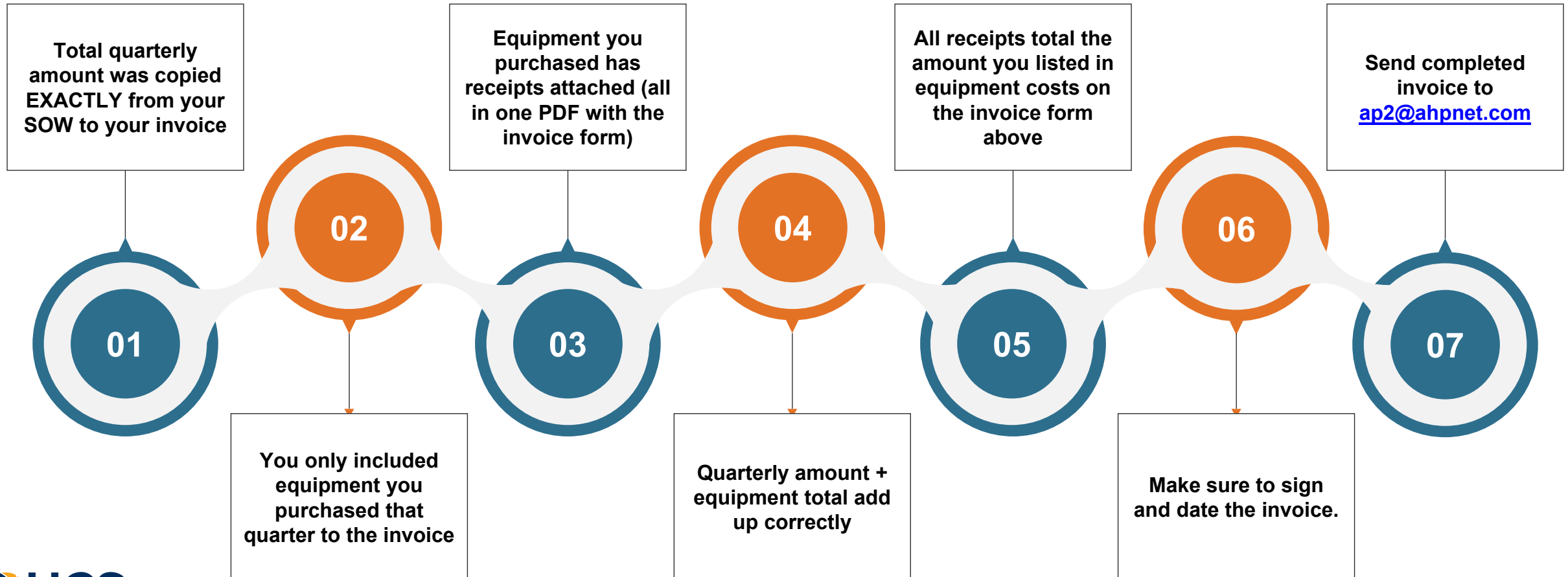
Payment terms are 30 days from AHP's receipt & approval of the Invoice, unless otherwise specified in your Consulting Agreement.

Invoices received more than 30 days after completion of services may not be eligible for payment.

No invoice will be approved for payment if AHP does not have your executed Subcontractor Agreement and signed W-9 on file.

Please Double - Check Your Work!

Verify that the amounts you invoiced for are correct:



Invoicing Instruction Summary

- Invoices are to be completed and submitted to AHP promptly upon completion of quarterly deliverables. Invoices received more than 15 days after completion of deliverables may not be eligible for payment.
- Complete the top portion of the invoice with your organization name, address, and phone and email contact information.
- Make sure your unique ID is on invoice.
- Refer to the “Statement of Work” provided with your Subcontract Agreement, and fill out the invoice grid with the following information:
 - Quarter #/Date Range
 - Deliverable Description (per contract, copy from contract quarterly deliverables)
 - Deliverable Amount
- Enter the total of line items.



Invoicing Instruction Summary

Please be sure to verify your invoice total; an invoice with incorrect values will be returned to the subcontractor for re-submission.

If your site has a budget for equipment purchases, itemize the purchases on the invoice, and attach all receipts for equipment purchased within that quarter.

Sign and date the invoice where indicated. Scan into PDF format and email the invoice to ap2@ahpnet.com.

Payment terms are 30 days from the date the invoice is received by A/P and approved by the project manager. No invoice will be approved for payment if you have not signed, or contract is not signed or if AHP does not have your signed EFT form / W-9 form on file (this is sent with your contract).

Questions or concerns regarding AHP's invoicing, and payment process may be directed to our Accounts Payable department at ap2@ahpnet.com.



When Can You Invoice?

Due Dates

6 invoices will follow your approved Statement of Work (SOW).

- **Y1Q1- Due as soon as your contract is signed and returned to AHP**
- Y1Q2 - July 7th , 2023
- Y1Q3 - October 9th , 2023
- Y1Q4 - January 8th , 2024
- Y2Q1- April 8th , 2024
- Y2Q2 - July 7th, 2024

****PLEASE NOTE - THERE IS A GRACE PERIOD MAKING THE FINAL DUE DATE THE 15th OF EACH QUARTER. IF NOT SUBMITTED BY THE 15th YOU WILL HAVE TO WAIT UNTIL THE NEXT QUARTER TO INVOICE.**

****Please communicate delays to the SOR3 team and we will be happy to accommodate you with an extension of time if needed.**



AHP Billing Resource

1. Questions or concerns regarding AHP's invoicing, and payment process should be directed towards your assigned Grantee Liaison.
2. Question about submitted invoices and audits can be directed to Linda McCarthy at lmccarthy@ahpnet.com.
3. Final Submission of invoice should be emailed to ap2@ahpnet.com.

PLEASE PUT ALL QUESTIONS IN Q&A BOX





Thank You