11. <u>Billing:</u>

After completing training procedure, the user can claim bills. The billing process is dived into three sections (Claim-1, claim-2 and claim-3). Each section is done by two steps which are bill submission and submitted bills.

i.   Enrollment (Claim-1):
      a.   Claim-1 Bill Submit:
      b.   Submitted Bills
ii. Certification (Claim-2)
         a.   Claim-2 Bill Submit
         b.   Submitted Bills
iii. Employment (Claim-3)
      a.   Claim-3 Bill Submit
      b.   Submitted Bills

Note: User can submit bills for one batch or can submit with a bulk. Once user submit a bill under claim-1, the same bill will be applicable for claim-2 and claim-3 sections. The user can not add a new batch to the previous bill, it will be added to the next bill queue.

The steps are discussed below:

i.   <u>Enrollment (Claim-1):</u>
The first bill can be claim after completing trainee enrollment process.

a. <u>Claim-1 Bill Submit:</u>

To claim a bill for claim-1, go to "Billing >> Enrollment (Claim-1) >> Claim-1 Bill Submit".

- A page will open to claim bill after trainee enrollment.

- Select "Course Type". Same type of courses will be added in one bill.
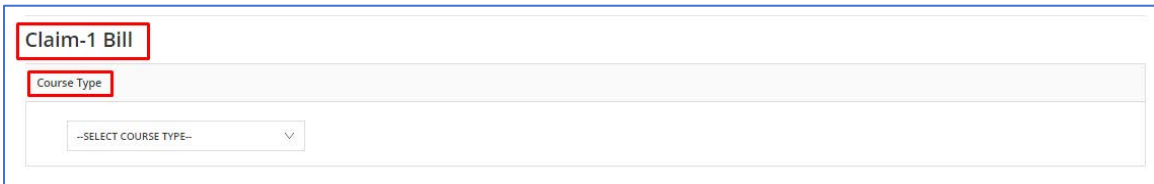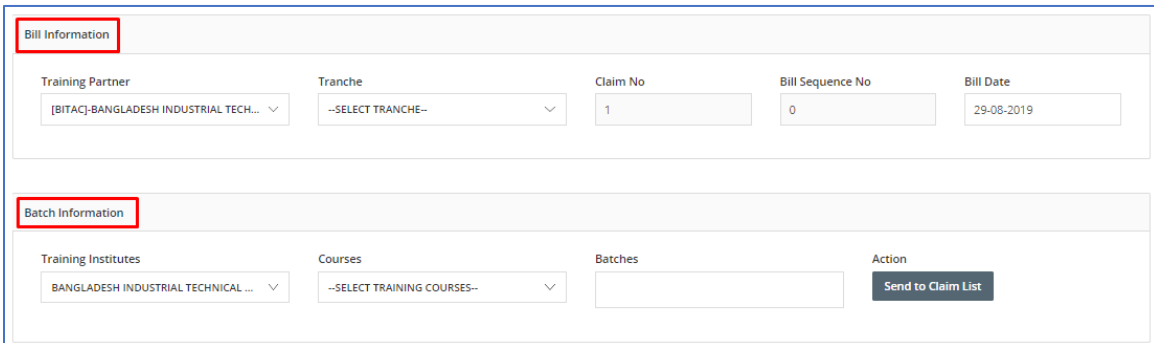
Figure 1

Next user will see bill information panel where user have to select tranche number and then bill sequence number will be automatically provide by system. Figure: 2.

- Select course and batch number to claim bill.
- User can select one/multiple course and course batch if the enrollment process is done.

Figure 2

- Click on "Send to Claim List" button to add batch/batches in list to claim bill.
- All course batch list is shown. Figure: 3.
- In bill calculation, "Contribution amount" will be deduced from "Gross amount". Association /institution will get the net payable amount.
- Now user can submit total bill for claim-1 bill submission.
- Bills can be submitted for single batch also. But once bill is submitted, user can't do any modification.
- Click on → [+] button to add batch bill in claim list.
- Or click → [🗑] button to remove batch from claim list.
- Finally, click "Submit" button for claim-1 bill submission.

Figure 3

Note: The submitted bill will be appeared in SEIP's dashboard and after monitoring bill details SEIP admin user can approve the bill which will then showed in association's dashboard as approved bill.

b. Submitted Bills:

To see the submitted bills for claim-1, navigate to "Billing >> Enrollment (Claim-1) >> Submitted Bills".

"Claim-1 Bill Information" page will be loaded.

- Select "Tranche" and "Bill" (Bill number).
- If the bill is approved by SEIP, user will see a message that "Your bill has been approved" otherwise it will show "Bill is waiting for approval".
- If the bill is approved, user will find the total summary of that bill. Figure: 4.
- Click "Invoice" button to see the invoice format of that bill.
- After clicking "Invoice" button, another tab will be open which contains the invoice details.
- Click "Print PDF" button to print the PDF of the invoice. See figure: 5.
- The bills which are not yet approved have a "Attachments" button. Click on the
  → Attachments button to attach files with bill claim-1 bill. See figure: 6 and 7

Figure 4

Figure 5

Figure 6

Figure 7

ii. **Certification (Claim-2):**

The second bill can be claim after completing trainee certification process.

a. **Claim-2 Bill Submit:**

To submit bill for claim -2 user need to navigate "Billing >> Certification (Claim-2) >> Claim-2 Bill Submit". Only clim-1 submitted bills are allowed to submit in clim-2.

- Select tranche and bill number.
- Bill date will be automatically set by system.
- All batch list with detail is shown below.
- If the bill is not submitted yet, user will see a message to add individual batch for claim 2 bill submission.
- If the bill is already submitted then user will see a message that bill is approved.
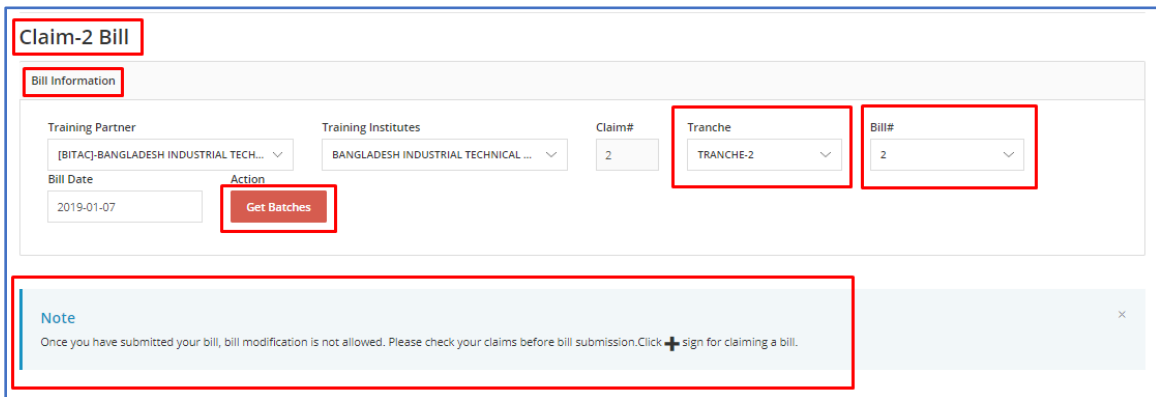

Figure 8

- Click on → [+] button to add batch.
- Add all batch for claiming bill.
- The list of add bills with detail calculation will be showed.
- The net bill is calculated in terms of assessed trainees (both passed and failed).
- Finally, click on "Submit" button to add that bill for claim-2 bill submission.

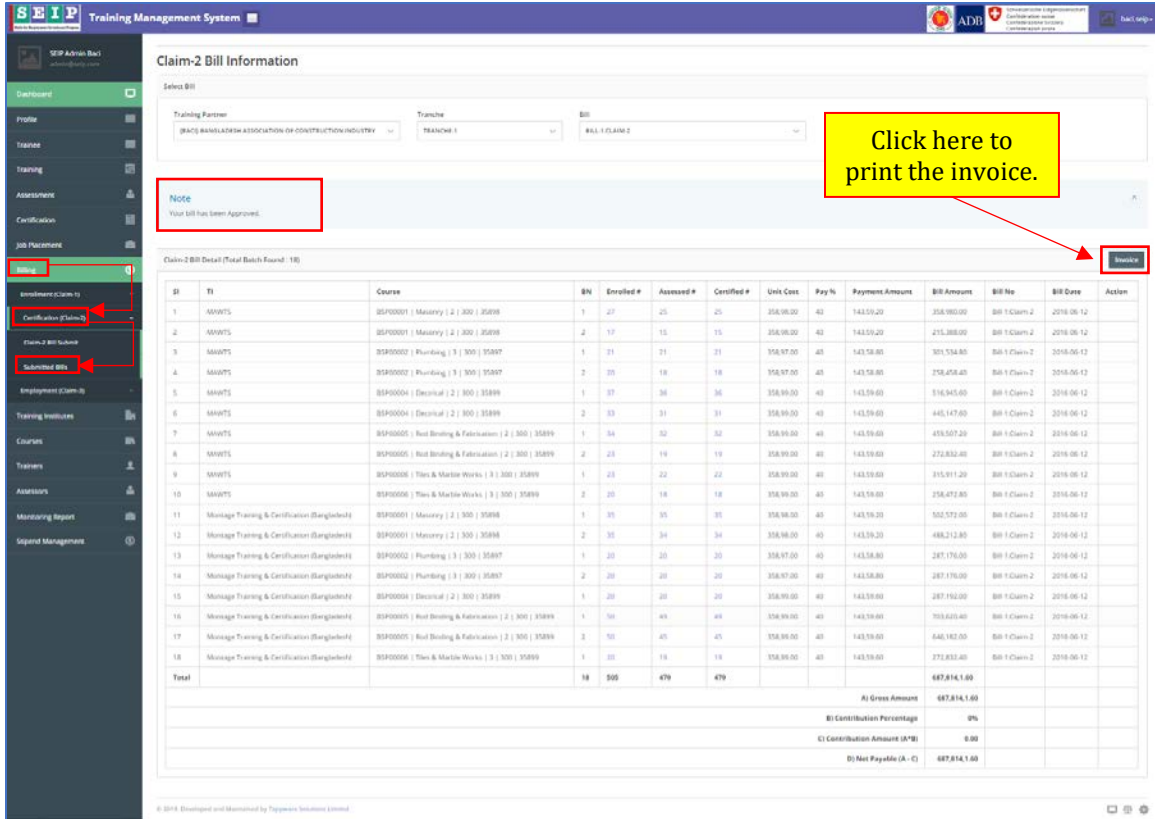**Note:** Once user submit bill, modification is not allowed.

Figure 9

b. Submitted Bills:

To see the submitted bills for claim-2, navigate to "Billing >> Certification (Claim-2) >> Submitted Bills".

"Claim-2 Bill Information" page will be loaded.

- Select "Tranche" and "Bill" (Bill number).
- If the bill is approved, user will see a message that "Your bill has been approved" otherwise it will show "Bill is waiting for approval".
- If the bill is approved, user will find the total summary of that bill. Figure: 10.
- Click "Invoice" button to see the invoice format of that bill.
- After clicking "Invoice" button, another tab will be open which contains the invoice details.
- Click "Print PDF" button to print the PDF of the invoice. See figure: 11.
- Claim-2 bill also has attachment option if the bill is not yet approved. Same as claim 1.

Figure 10

Figure 11

iii.   Employment (Claim-3):

The third bill can be claim after completing trainee job placement process.

a.   Claim-3 Bill Submit

- Click on "Billing>>Employment (Claim-3)>>Clim-3 Bill Submit".
- User will find a page containing bills for Claim-3 bill submit process.
- Select training institute, claim no, tranche, Training type.
- Bill date will be selected automatically by system.
- Press "Get Bill Information" button to get further information about claim-3 bills.
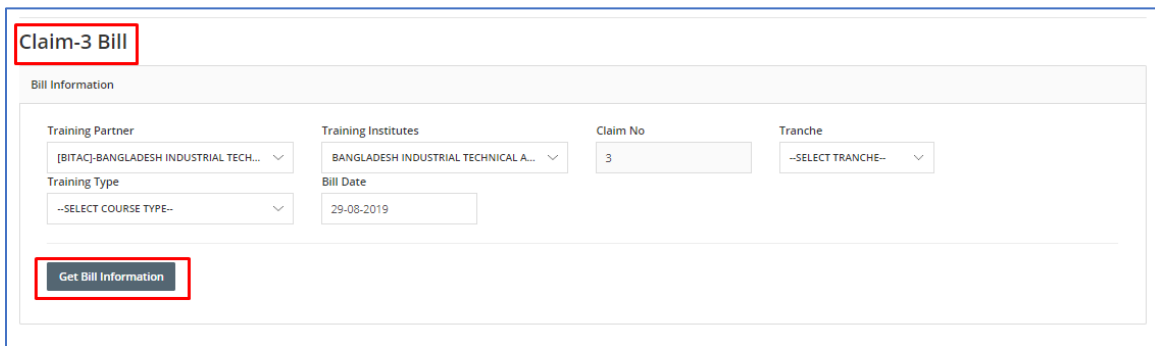

Figure 12

Now user can see available bills for claim-3 submission. Figure: 13.

- Select bill no from "Bill" dropdown.
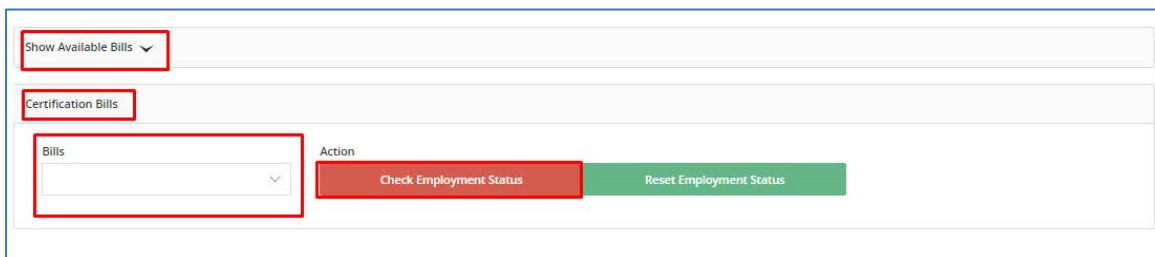- Click on "check employment Status" button.

Figure 13

- Selected bills are listed in "Bill Status" panel with calculation details. Figure: 14.

- If the employment percentage of bill is upper than required percentage then user can submit that bill.
- User can also add multiple bills for claim-3. If the average percentage of all bills is upper than required employment percentage then user can submit that bill.
- Press "Add Into Claim List" button to submit the listed bill/bills.

Bill Status

Bill	Batch Count	Net Count			Employment Progress	Status
		Claim-1	Claim-2	Claim-3		
Till Now		0	0	0		(0 / 0) = NaN%
Bill-1:Claim-2	3	88	88	62	62 / 70.45%	(62 / 88) = 70.45%
Bill-2:Claim-2	3	90	90	74	74 / 82.22%	(136 / 178) = 76.40%
Total		178	178	136	136 / 76.40%	

Add Into Claim List

Figure 14

b. **Submitted Bills:**

To see the submitted bills for claim-3, navigate to "Billing >> Employment (Claim-3) >> Submitted Bills".

"Claim-3 Bill Information" page will be loaded.

- Select "Tranche" and "Bill" (Bill number).
- If the bill is approved, user will see a message that "Your bill has been approved" otherwise it will show "Bill is waiting for approval".
- If the bill is approved, user will find the total summary of that bill. Figure: 15.
- Click "Invoice" button to see the invoice format of that bill.
- After clicking "Invoice" button, another tab will be open which contains the invoice details.
- Click "Print PDF" button to print the PDF of the invoice. See figure: 16.
- Claim-3 bill also has attachment option if the bill is not yet approved. Same as claim 1 and claim 2.

Figure 15

Figure 16

15. Bill Adjustment:

This menu is only active for users who need to adjust bills further (for example BBSME). If user wants to adjust bills, they can do it by using TMS. But the process can be done once. New unit cost will be automatically adjusted with the bill in the next claim if the bill is not submitted yet. But if the bill is already submitted then user have to manually change the bill again in the next claim.

To change bill unit cost, navigate to "Bill Adjustment" from the left menu. It expands with three options-

   i.   Enrollment Bill Adjustment

  ii.   Certification Bill Adjustment

 iii.   Employment Bill Adjustment

i.   Enrollment Bill Adjustment:

From here user can change unit cost for clim-1 bill. Go to "Billing >> Bill Adjustment >> Enrollment Bill Adjustment".

- A new page open with title "Bill Information". Figure: 17.
- Select "Tranche" and "Bill Number".
- Click on "Invoice" button to see the details of bill and print the copy also.
- User can see all trainee list of a batch by clicking on trainee total number.
- Now if user wants to update unit cost then fill the new amount on "New Unit Cost" column.

- System will automatically calculate new payment amount, new bill amount and adjustable amount.

- Click on "Update Bill" button if you want to change the bill unit cost.

Figure 17

- Click "Ok" if you are sure to submit the updated bill. Because the bill can be update once.
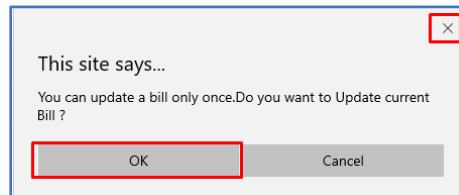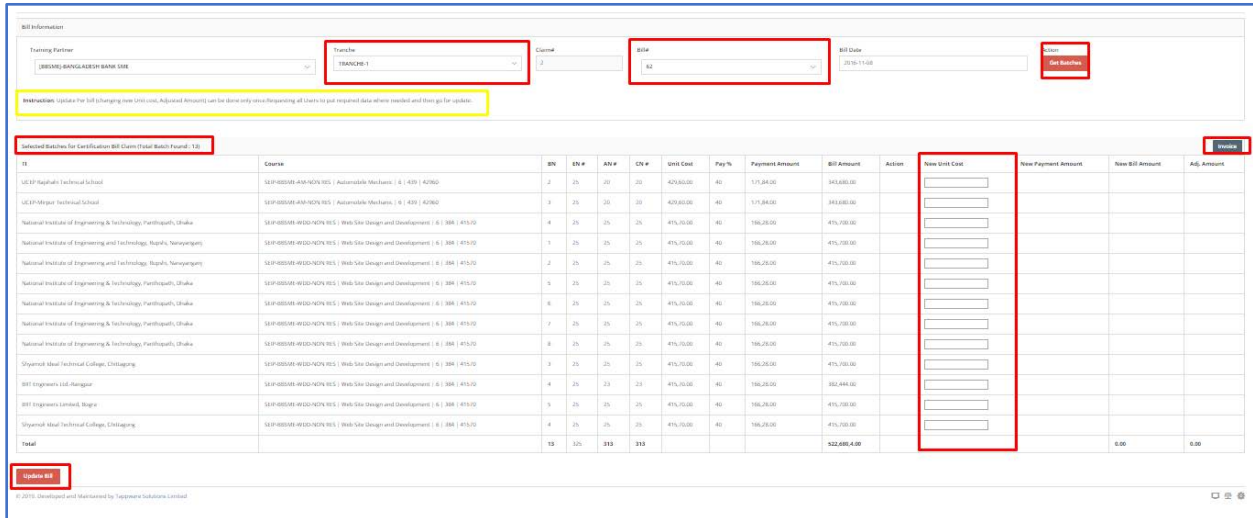

Figure 18

- Finally, the bill will be updated and adjusted with the bill in next claim.

ii. **Certification Bill Adjustment:**

From here user can change unit cost for clim-2 bill. Go to "Billing >> Bill Adjustment >> Certification Bill Adjustment".

- A new page open with title "Bill Information". Figure: 19.

- Select "Tranche" and "Bill Number".

- Click on "Invoice" button to see the details of bill and print the copy also.

- User can see all trainee list in terms of enrolled, assessed and certified of a batch by clicking on trainee total number from column "EN #", "AN #", "CN #".

- Now if user wants to update unit cost then fill the new amount on "New Unit Cost" column.

- System will automatically calculate new payment amount, new bill amount and adjustable amount.

- Click on "Update Bill" button if you want to change the bill unit cost.

Figure 19

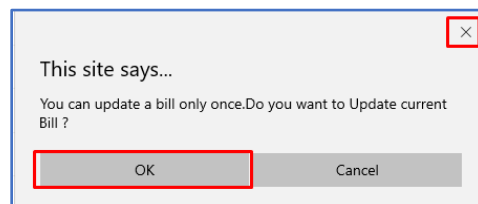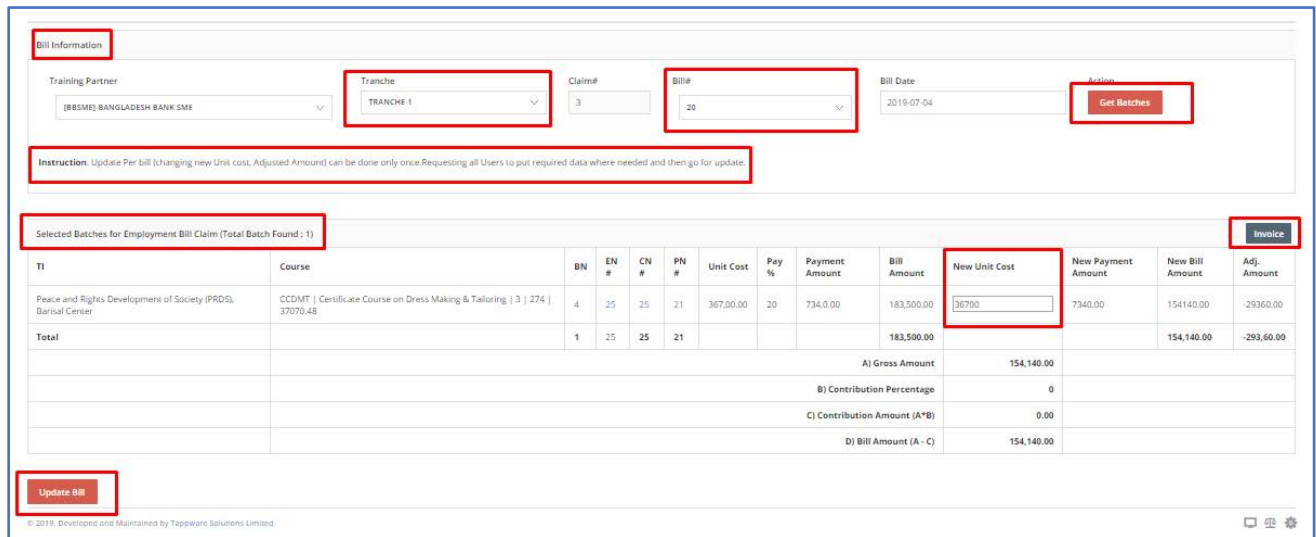- Click "Ok" if you are sure to submit the updated bill. Because the bill can be update once.

Figure 20

- Finally, the bill will be updated and adjusted with the bill in next claim.

iii. **Employment Bill Adjustment:**

From here user can change unit cost for clim-3 bill. Go to "Billing >> Bill Adjustment >> Employment Bill Adjustment".

- A new page open with title "Bill Information". Figure: 21.
- Select "Tranche" and "Bill Number".
- Click on "Invoice" button to see the details of bill and print the copy also.
- User can see all trainee list in terms of enrolled, assessed and certified of a batch by clicking on trainee total number from column "EN #", "AN #", "CN #".
- Now if user wants to update unit cost then fill the new amount on "New Unit Cost" column.
- System will automatically calculate new payment amount, new bill amount and adjustable amount.
- Click on "Update Bill" button if you want to change the bill unit cost.

Figure 21

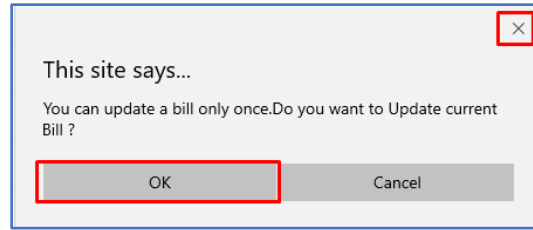- Click "Ok" if you are sure to submit the updated bill. Because the bill can be update once.

Figure 22

- Finally, the bill will be updated.