

Invoicing in PASSPort: A Complete Guide

Learn all about invoicing – how to create invoices, track your invoices, understand invoice statuses, resolve common blocking alerts, and more.

Once you're familiar with the process, feel free to use our quick reference guide [Create an Invoice](#) to help with submitting invoices going forward.

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Before We Begin

Users provisioned with the following roles can create, edit, and submit Invoices:

- **Vendor Admin**
- **Vendor Financials Level 2 (L2)**

Vendor Financials Level 1 (L1) users can view, but not submit, invoices.

1. Overview

Creating and submitting invoices in PASSPort is a five-step process:

- Open the relevant **Purchase Order (PO)** affiliated with your Active contract.
- Click the **Create Invoice** button. A Draft status invoice will be generated.
- Add **Invoiceable Items** to your invoice.
- Upload **supporting documents** to your invoice.
- Click **Submit Invoice** to send it to your contracting agency for review.

Basic Steps to Submit an Invoice:



2. Invoicing Basics: What You Need to Know

Before doing any work in PASSPort, read this:

- **Know when you can invoice:** Invoicing can begin once these conditions have been met:
 - The contract is **registered**.
 - The work has **started**.
 - Your budget is **Approved**.
 - Your Purchase Order (PO) is **Active**.
- **Study your Agency's Fiscal Manual** to learn about their fiscal policies and requirements, such as invoicing intervals, deadlines, and required documentation. **Note:** This information is agency-specific; PASSPort and MOCS cannot provide guidance on these matters.
- **Ensure PASSPort access:** Make sure your colleagues working on invoices and payments have access to your organization's PASSPort account and are assigned the necessary user role(s) to do the work: **Vendor Admins** and **Vendor Financials Level 2 (L2)** can create and submit invoices.
- **Attention DYCD providers:** Depending on your program specifics, you may need to process financials **outside** of PASSPort using Program Expense Summary Report (PERS) or a Fiscal Agent - YMS. Visit the [DYCD website > CBO Financials Services](#) to learn more, download the relevant Fiscal Manual, and reach out to BudgetandFinanceHelp@dycd.nyc.gov for assistance.

3. Create the Invoice

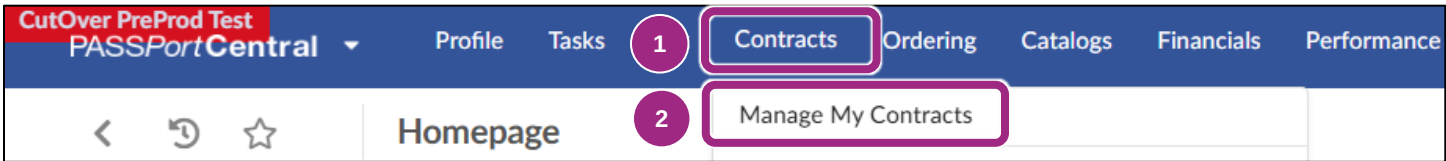
3.1 Find the Purchase Order (PO)

Quick Reminders:

- A Purchase Order (PO) represents the **contract budget for a specific fiscal year**.
- A new PO is issued for **each fiscal year** of your contract.
- Depending on the length of your contract, you may receive **multiple POs** over time.
- Recommended: Submit invoices through the **PO** to avoid over-invoicing.
- You can only invoice against an **Active** PO.
- **NYC’s fiscal year** begins July 1 and ends June 30.

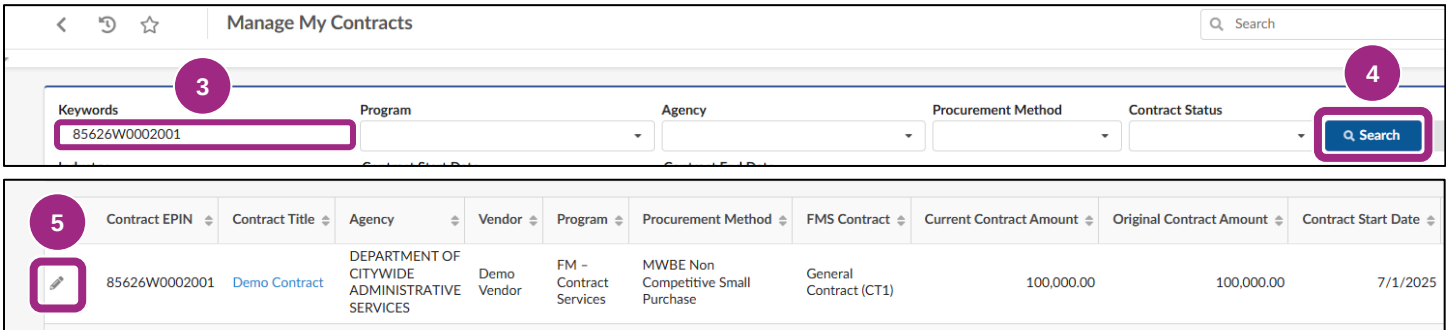
Follow these steps to locate the PO ID:

1. Click **Contracts** in the top navigation 444menu.
2. Select **Manage My Contracts** from the drop-down menu.



The Manage My Contracts page appears.

3. Enter the Contract EPIN or Contract ID in the **Keywords** field or use the other search filters to locate your contract.
4. Click the **Search** button. Search results will appear below the search filters.
5. Click **pencil** icon to enter the contract.



The contract opens into the Overview tab.

- Go to the **Header** tab using the left navigation menu.
- Scroll to the **Fiscal Year Budgets** section near the bottom of the page to view the PO ID.
Each fiscal year has its own PO for expense contracts. Capital funding will have FY9999.

BUDGET FISCAL YEAR	CURRENT BUDGET	CURRENT BUDGETED AMOUNT	YTD INVOICED AMOUNT	RE
2025	PO393280	616,459.11	436,967.50	
2026	PO435542	1,521,563.56		

Now that the PO ID has been located, we can begin invoicing.

Follow these steps to access the PO:

- Click **Financials** on the top navigation menu.
- Select **Browse Contract Budgets** from the drop-down menu.

The Browse Contract Budgets page appears. All your Purchase Orders (fiscal year budgets in PASSPort) are housed on this page.

- In the **Keywords** text field, enter the PO ID. (Example: PO404140).
- Click the **Search** button. Search results will display in a table below the search filters.
- Click the **pencil** icon to open the PO.

ID	Budget FY	PO Initiator	Status	Budgeted Amount	Received	Invoiced(Gross)	Contract
PO435542	2026	Karen Doe	Active	1,521,563.56			AHC20-Q1 Renewal

The Purchase Order displays.

Tip: To quickly access this PO in the future, click the **star** icon to add it to your favorites. All your favorited pages can be viewed by click the **star** icon again.

The screenshot shows the PASSPortCentral interface. The top navigation bar includes links for Profile, Tasks, RFx, Contracts, Ordering, Catalogs, Financials, Performance, and Support. Below the navigation bar, the PO header section is displayed with the title "PO: PO404140 - 06925N0017-HHS Invoice Demo Do Not Touch - CAMBA INC (Active)". A red arrow points to the star icon in the top navigation bar. The left sidebar shows the "Overview" section selected. The right sidebar shows buttons for "Create a Invoice Deduction", "Create Invoice", and "Request Advance".

6. View the budget details listed in the PO Header section:

- **Fiscal Year:** Is it correct? (NYC's fiscal year is July 1 - June 30. Current: FY 2026)
- **Status:** Does it show as Active? (Example: Yes)
Note: Invoices can only be submitted via an Active PO.
- **Budgeted Amount:** Is it sufficient? (Example: \$150,000)
Note: Your invoice cannot exceed the budgeted amount. If it will, stop and reach out to your contracting agency to see if they can increase your budget.
- **Program:** Is it correct? (Especially if your contract covers multiple programs.)

The screenshot shows the PASSPortCentral interface with the PO header section expanded. A red box highlights the budget details section, which includes the following information:

Header	
Fiscal Year	2026 - City of New York (Legal)
Status	Active
Budgeted Amount	150,000.00
Program	OLA/Office of Civil Justice

The left sidebar shows the "Overview" section selected. The right sidebar shows buttons for "Create a Invoice Deduction", "Create Invoice", and "Request Advance". A red circle with the number "6" is placed next to the "Budget" link in the left sidebar.

7. Check if the budget lines are marked invoiceable.
 - a. Go to the **Budget** tab of the Purchase Order.
 - b. Scroll down to **Detailed FY Budget** section. There should be a checkmark in the **Invoiceable?** column indicating that the line item can be invoiced.

Note: Reach out to agency if the item is not checked invoiceable.

The screenshot shows the PASSPort system interface for Purchase Order PO: PO435542 - (Active). The left sidebar contains navigation tabs: Overview, Receipts, Invoices, and Budget. The Budget tab is highlighted with a purple box and labeled 7a. The main content area shows the 'Detailed FY Budgets' section. At the top, there are buttons for 'Create a Invoice Deduction' and 'Create Invoice'. Below these, there are filters for 'Filled in' (Percentage and Amount) and 'Amount still unallocated' (\$-133679.78). A table displays budget line items with columns: Sub-Budget, Item Category, Sub Item Category, Budget Line Item, Additional Information, Expected Delivery Date, Invoiceable?, and Quantity. The first row shows 'Other' under Item Category, 'AHC20-Q1 Renewal - Expense' under Budget Line Item, and a checked checkbox in the 'Invoiceable?' column, which is highlighted with a purple box and labeled 7b. The table also shows '1 Result(s)' at the bottom.

Sub-Budget	Item Category	Sub Item Category	Budget Line Item	Additional Information	Expected Delivery Date	Invoiceable?	Quantity
	Other		AHC20-Q1 Renewal - Expense			☒	1.6

3.2 Create the Invoice

1. Click the **Create Invoice** button at the top of the page.

The screenshot shows the top navigation bar of the PASSPort Central system. The main header displays the purchase order number 'PO: PO404140 - 06925N0017-HHS Invoice Demo Do Not Touch - CAMBA INC (Active)'. Below this, there are three buttons: 'Create a Invoice Deduction', 'Create Invoice' (highlighted with a red circle and the number 1), and 'Request Advance'. On the left side, there is a sidebar with 'Overview' and 'Indirect Rate' options.

Once you create the invoice, you will see the Invoice Header. From here, start inputting information in the mandatory fields marked with the red asterisk (*).

2. Enter an Invoice reference number in the **Invoice Ref** field.

This can be any alphanumeric identifier and is often the vendor's internal invoice number.

The screenshot shows the 'Invoice Header' form. The 'Invoice Ref.*' field is highlighted with a red circle and the number 2. Other fields include 'Fiscal Year' (set to 2026), 'Status', and 'Creation Date' (set to 9/11/2025). On the right side, there are sections for 'Orders/Contracts' (showing 'PO435542 - AHC20-Q1 Renewal #1') and 'Payment Information' (showing 'PRC2/PPRC2 ID'). At the top right, there are buttons for 'Save', 'Save and Close', and 'Exit'.

3. Scroll down to the **Payee Address** field. The Payee Address should be the same address used by your organization in the Payee Information Portal (PIP). If Payee Address does not auto-populate, click the drop-down arrow, then click **See All** to view the addresses you have on file.
4. Click the **Save** button at the top of the page.

The screenshot shows the 'Payee Vendor' and 'Payee Address' fields. The 'Payee Vendor' field is set to 'AARCO ENVIRONMENTAL SERVICES CORP'. The 'Payee Address' field is empty, with a red circle and the number 3 highlighting the 'See All' button below it. At the top right, the 'Save' button is highlighted with a red circle and the number 4. The 'Save and Close' and 'Exit' buttons are also visible.

- The page refreshes and PASSPort generates a **Draft** Invoice. Notice that:
 - An **Invoice ID** (Example: INV331604) appears in the top left-hand corner of the invoice title.
 - Draft** status displays in both the Invoice title and the **Status** field.
 - The **Creation Date** field populates with the date the invoice was submitted.
 - A red blocking alert appears in the **Alert** section at the top of the page.

Note: This is normal; it is the system telling you to input more information.

Pre Prod Debug PASSPortCentral

Profile T RFX Contracts Ordering Catalogs Financials Performance Support

INV331604 - Invoice 2025_Jul1-Jul31 - CAMBA INC - (Draft) Help Center

Save Save and Close Exit Submit Invoice Cancel Invoice

Fields marked by an asterisk * are mandatory

Alert

Please add item(s) under "Product and Services"

Invoice Header

Fiscal Year: 2026

Status: Draft

Creation Date: 5/27/2025

Orders/Contracts

Orders*

PO404140 - 06925N0017-HHS Invoice Demo Do Not Touch

Contract

06925N0017-New NAa AC - CT1-069-20268800028

3.3 Add Invoiceable Items

- Scroll down to the **Products / Services** section of the invoice. Click one of the two options:
 - Add All Invoiceable Items**: Adds all invoiceable lines from the budget into the invoice.
 - Add An Item**: Adds one line at a time.

Note: This guide will show how to “Add an Item.” If you are invoicing for multiple lines, use the Add All Invoiceable Items option.

PRODUCTS / SERVICES

Hover (hold mouse pointer over) or click Gap amount to view Ordered and Received quantity and amount.

Add All Invoiceable Items Add An Item 1

Item Label	Unit	Invoice Quantity	Invoice Unit Price	Invoice Amount	Invoice Value	Sub-Budget
0 Result(s)						

The Add/Edit Invoice Lines window appears.

- Click the ellipses (three dots) under **Item Label**. The Order Line Items window appears.
 - Click the **checkbox** to select the invoiceable Product or Service from the budget to be invoiced.
- The Order Line Items window will close, and you return to the Add/Edit Invoice Lines window.

Add/Edit Invoice Lines

Order Line Items

Close | Add Selected Items | Add All

Keywords

Orders
 PO435542 - AHC20-Q1 Renewal #1

Vendor
 AARCO ENVIRONMENTAL SERVICES CORP 810551121

☐ Show Invoiceable Items Only

Filters Orders : PO435542 - AHC20-Q1 Renewal #1 Order type : CTR

Good/Service	Item Category	Sub-Budget	Sub Item Category	Budget Item Label	Expected Delivery Date	Invoiceable?
☒ Service	Other			AHC20-Q1 Renewal - Expense		☒

- Click the **Save** button at the top of the window.

Add/Edit Invoice Lines

- Enter dates in both the **Service Dates From** and **To** fields to identify when services started and ended. Both dates should be within the purchase order's fiscal year (July 1st – June 30th).

Add/Edit Invoice Lines

Alert

- The Invoice Service Dates are not within the start and end date of the Invoice Fiscal Year.
- Either Invoice Amount or Invoice Value must have a dollar amount greater than zero.

Invoice Line

Item Label*

Item Type
 Service

Order
 PO435542 - AHC20-Q1 Renewal #1

Service Dates From* To*

Important: If service dates start in one fiscal year and end in the next fiscal year, it's important to **split the charges** by submitting two invoices, one invoice per for services completed in the end of the fiscal year and beginning of the next fiscal year.

6. If this is the first invoice against the PO, click the **Units** drop-down and select 'Dollars' or 'Each'.

Note: Whichever unit you choose will automatically populate going forward. Either unit is fine unless the item is rate-based (like equipment), in which case Each should be selected.

7. Enter in Invoice Amount or Quantity.

- If Units is '**Each**', enter the quantity you want to invoice in the **Invoice Quantity** field.
- If Units is '**Dollar**', enter the amount you want to invoice in the **Invoice Amount** field.
- The quantity or amount you want to invoice must be less than or equal to the Remaining Amount for this item line on the PO budget.

Important: Leave the **Invoiced Value** text field empty.

Add/Edit Invoice Lines

Save Save and Close Close

AHC20-Q1 Renewal - Expense

Order
PO435542 - AHC20-Q1 Renewal #1

Service Dates From*
9/1/2025

To*
9/5/2025

Invoice Quantity
1.00000

Unit Price ⓘ
12,500.00

Units*
Dollars

Invoice Amount
12,500.00

Invoiced Value
✗

Total PO 150,000.00
Total Received 0

8. Click the **Save** button at the top of the window.

Add/Edit Invoice Lines

8

Save Save and Close Close

9. PASSPort calculates the **remaining amount** between the Total PO amount and the Invoice Amount - and displays the difference or **Gap**. (Example: \$150,000 minus \$12,500 = \$137,500). The Gap indicates the amount up to which you can invoice for the rest of the fiscal year. (Example: You can invoice for up to \$137,500).

Invoice Quantity
1.00000

Unit Price ⓘ
12,500.00

Invoiced Value

Units*
Dollars

Invoice Amount
12,500.00

Total PO 150,000.00
Total Received 0
Total Invoiced 12,500
Gap 137,500.00

9

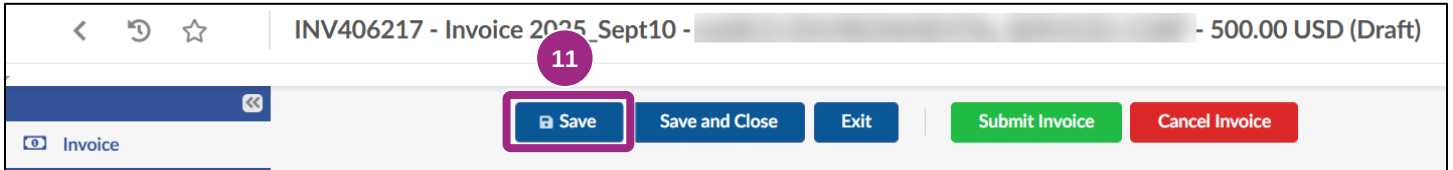
10. Click the **Save and Close** button near the top of the window to return to the Invoice page.



The screenshot shows a window titled "Add/Edit Invoice Lines". At the top right, there are icons for print, maximize, and close. Below the title bar, there are three buttons: "Save", "Save and Close", and "Close". The "Save and Close" button is highlighted with a red circle and labeled with the number 10.

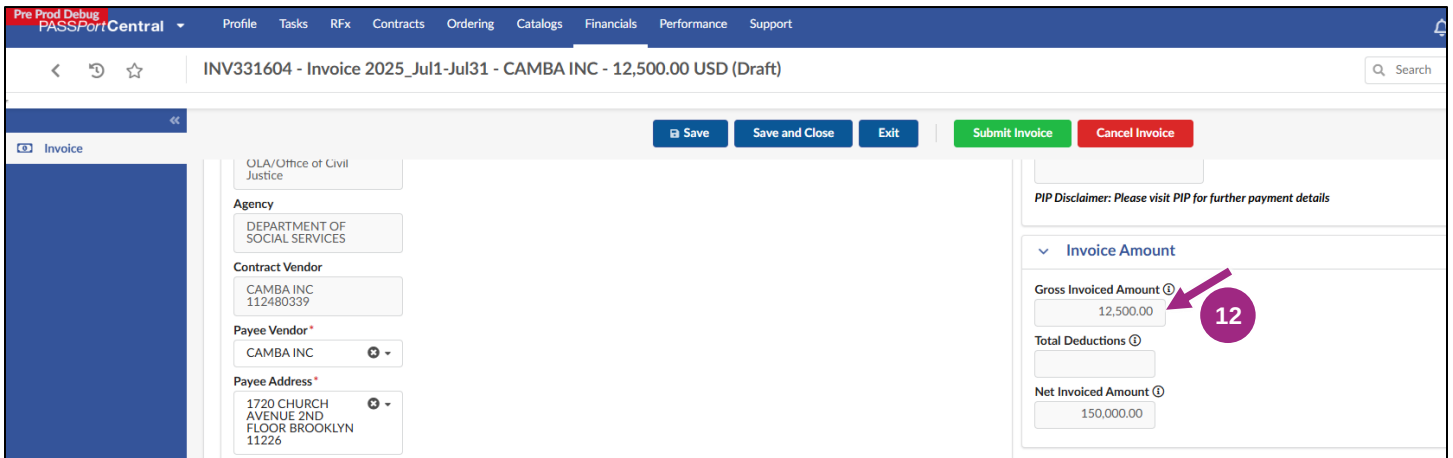
Repeat steps 1-10 for each line of the budget that you wish to add.

11. Click the **Save** button near the top of the Invoice.



The screenshot shows the top of an invoice page. The header includes navigation icons, the invoice number "INV406217", the date "Invoice 2025_Sept10", and the amount "- 500.00 USD (Draft)". Below the header, there are several buttons: "Save", "Save and Close", "Exit", "Submit Invoice", and "Cancel Invoice". The "Save" button is highlighted with a red circle and labeled with the number 11.

12. In the Invoice Amount section, the **Gross Invoiced Amount** field will update.



The screenshot shows the main body of an invoice page. On the left, there are sections for "Agency" (OLA/Office of Civil Justice, DEPARTMENT OF SOCIAL SERVICES), "Contract Vendor" (CAMBA INC, 112480339), "Payee Vendor" (CAMBA INC), and "Payee Address" (1720 CHURCH AVENUE 2ND FLOOR BROOKLYN 11226). On the right, there is an "Invoice Amount" section with a "PIP Disclaimer: Please visit PIP for further payment details". Below the disclaimer, there are three fields: "Gross Invoiced Amount" (12,500.00), "Total Deductions", and "Net Invoiced Amount" (150,000.00). The "Gross Invoiced Amount" field is highlighted with a red circle and labeled with the number 12.

Tip: If you need to complete the invoice in more than one PASSPort session, an easy way to locate your Draft Invoice is to search for the **PO** again and then click the **Invoices** tab of the PO.

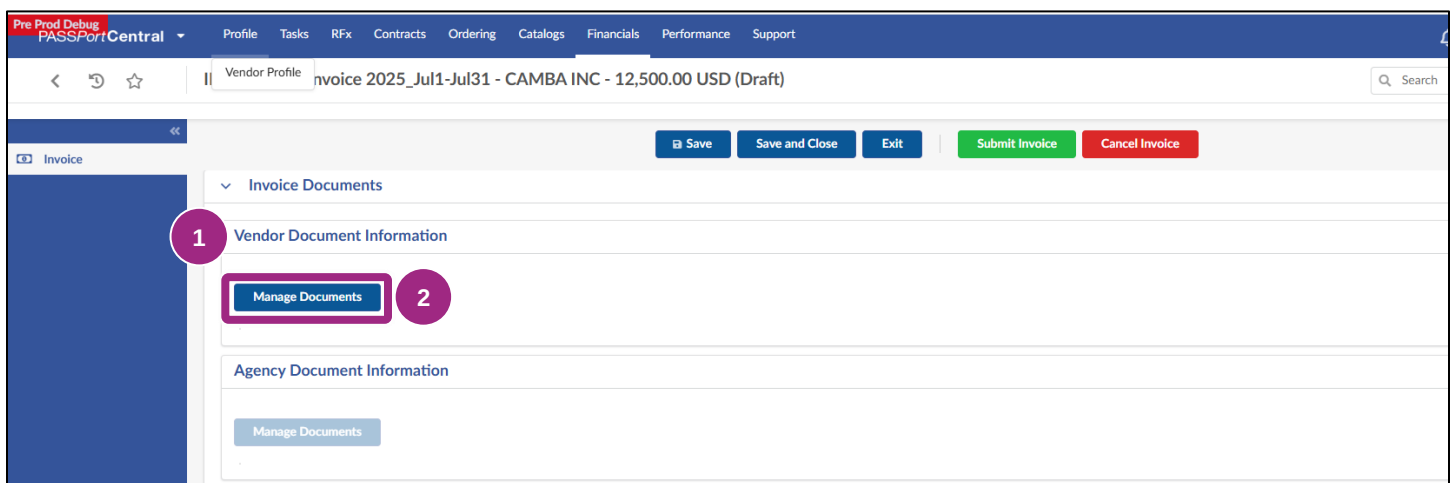
3.4 Upload Documentation

Invoice submissions must include the necessary documentation as requested by your contracting agency.

Uncertain which documents must be uploaded?

Invoice submissions must include the appropriate documentation. For specific documentation requirements and guidance, refer to your contracting Agency's Fiscal Manual, typically available on the agency's website. If you need further assistance, contact your contracting agency (see the **Overview** tab of your contract which lists contact details in the **Internal Agency Team** section).

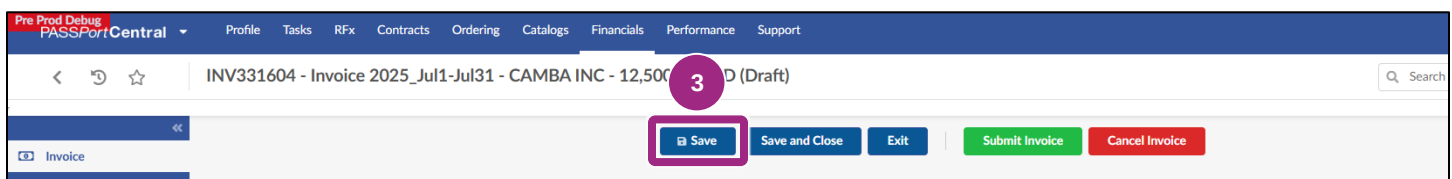
1. Go to the **Vendor Document Information** section located in the Invoice Documents section towards the bottom of the Invoice.
2. Click **Manage Documents** button and follow the prompts to link a file by either [uploading it from your computer or linking it from your organization's PASSPort Vault](#).



Documentation Guidelines:

- Accepted file formats: PowerPoint, Excel, Word, or PDF.
- Maximum file size: 125 MB per file.
- Maximum of 10 documents can be uploaded simultaneously, as long as the documents combined do not exceed 300MB.
- You may attach an unlimited number of files to your invoice.

3. Click **Save** at the top of the Invoice.



- Review all entries to ensure all required documentation is uploaded in accordance with your Agency's fiscal guidance. When ready to submit the Invoice to your contracting agency, click the green **Submit Invoice** button.

The screenshot shows the PASSPortCentral interface. The top navigation bar includes links for Profile, Tasks, RFx, Contracts, Ordering, Catalogs, Financials, Performance, and Support. The main header displays the invoice details: INV331604 - Invoice 2025_Jul1-Jul31 - CAMBA INC - 12,500.00 USD (Draft). Below the header, there are buttons for Save, Save and Close, Exit, and a green Submit Invoice button (highlighted with a green box and a purple circle with the number 4). A red Cancel Invoice button is also present.

- A dialog box will appear and display the following message:

"I hereby certify that the expenditures reported herein are an accurate representation of expenses incurred and paid by the organization in accordance with the City-approved contract and budget."

Click the **OK** button.

The dialog box contains the text "nyc-pre.ivalua.us says" followed by the certification statement: "I hereby certify that the expenditures reported herein are an accurate representation of expenses incurred and paid by the organization in accordance with the City-approved contract and budget." At the bottom, there are two buttons: OK (highlighted with a purple circle with the number 5) and Cancel.

Congratulations! You have successfully submitted the invoice.

At this point, the Invoice status has updated from Draft to **Invoice Approval in Progress**, and the **Creation Date** displays today's date.

The screenshot shows the PASSPortCentral interface with the invoice details updated. The top navigation bar is the same. The main header now displays: INV331604 - Invoice 2025_Jul1-Jul31 - CAMBA INC - 12,500.00 USD (Invoice Approval in Progress). Below the header, there are buttons for Create Invoice Deduction and Cancel Invoice. The main content area is divided into sections: Invoice Header, Orders/Contracts, and Payment Information. The Invoice Header section shows the following details: Fiscal Year (2026), Status (Invoice Approval in Progress), Creation Date (5/27/2025), Invoice Ref. (2025_Jul1-Jul31), and Original Submission Date (5/27/2025). The Orders/Contracts section shows the Order (PO404140 - 06925N0017-HHS Invoice Demo Do Not Touch) and the Contract (06925N0017-New NAa AC - CT1-069-20268800028). The Payment Information section shows the PRC2/PPRC2 ID and the Disbursement Date.

4. Next Steps: After You Submitted the Invoice

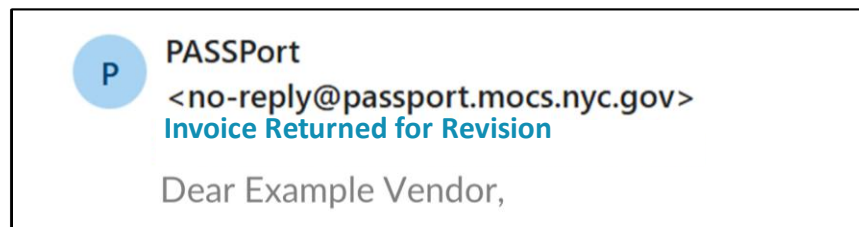
What happens after an invoice is submitted?

- **Agency Review:** Your contracting Agency has 30 days to review your submitted invoice and either approve or return it to you for revision. During Agency review, you will not be able to make any additional changes to invoices.
- **Invoice Returned for Revision:** The Agency may return the invoice to you for revision and resubmission. [See Invoice Returned for Revision instructions.](#)
- **Payment:** Once the Agency approved the Invoice, the invoice status will update to Approved and a payment will be made to your EFT account as listed in the Payee Information Portal (PIP).

4.1 Invoice Returned for Revision

If the Agency **rejects** the invoice and requires changes to your invoice, you'll receive an email notification from PASSPort explaining the reason(s) for the return. The email outlines the steps needed to revise and resubmit the invoice.

Example:



ACTION Vendor, INV331577 for your organization has been returned for the following reason(s): Shawn Jones : Please address the following issues and resubmit: 1. The format for Invoice Ref. in PASSPort should be as follows: DFTA ID number, followed by first 3 letters of the Month, followed by the Calendar Year – E.g., 1KH Feb 24. 2. Invoice Service Dates should be for E.g. 02/01/2024 – 02/29/2024. Please upload the following: a) Invoice Attestation. b) Invoice Expense Template. c) Payroll Ledger. (if applicable) d) Invoice Services and Cost Center Template. e) Receipts/bills and proof of payment for all OTPS expenses along with a footed cover sheet. All expenses must be incurred within the year corresponding to the award period. Please note: If there are no invoices between 07/01/2023 – 01/31/2024, please explain in the comments section of the February invoice. Contact Shawn for any question/s at sjones@agency.nyc.gov or 212-555-1234
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The invoice will be back in Draft status, meaning it can be edited.

To revise the invoice, open it, make the necessary changes, and click the **Submit Invoice** button.

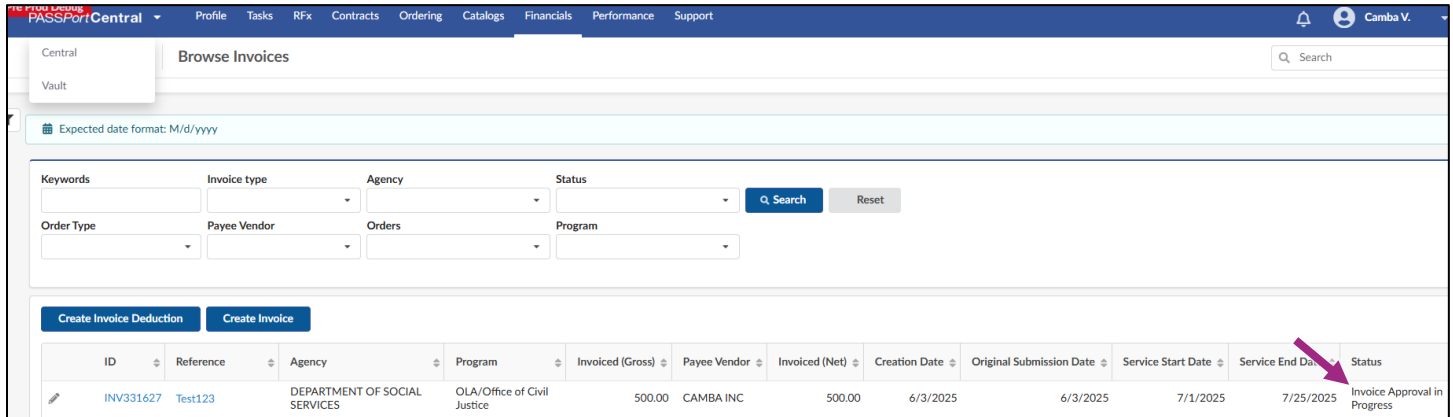
5. Track the Progress of Your Invoice

Track of the status of your invoice by monitoring the Invoice **Status** field updates.

The **status** of the Invoice can be viewed in three places:

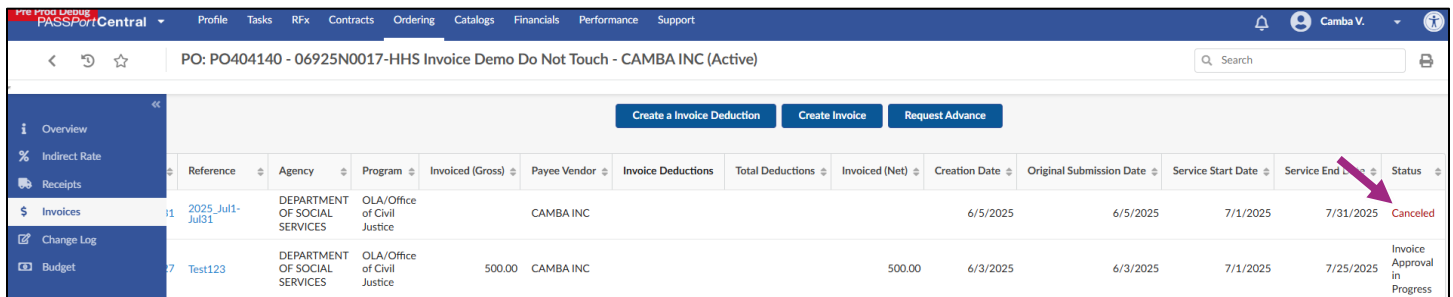
1. On the **Browse Invoices** page
2. On the Purchase Order > **Invoices** tab
3. Directly in the **submitted invoice**.

1. Follow the path Financials > **Browse Invoices** to view the Invoice status. Click the pencil icon if you wish to access the invoice.



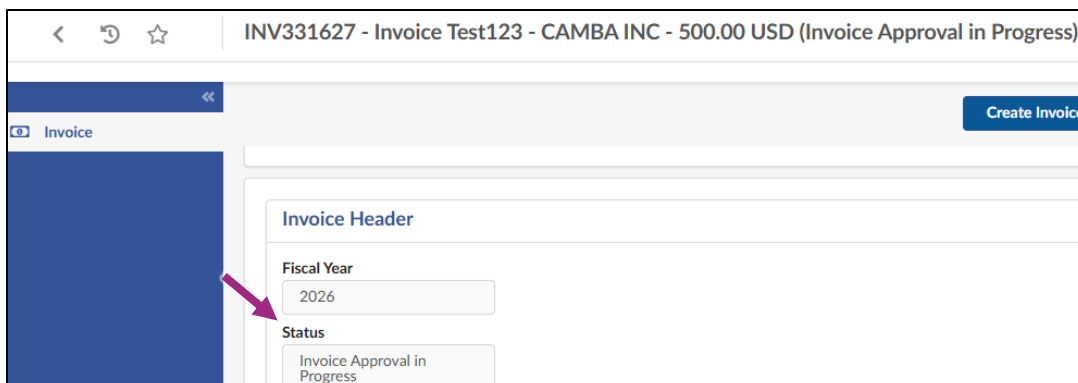
ID	Reference	Agency	Program	Invoiced (Gross)	Payee Vendor	Invoiced (Net)	Creation Date	Original Submission Date	Service Start Date	Service End Date	Status
INV331627	Test123	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice	500.00	CAMBA INC	500.00	6/3/2025	6/3/2025	7/1/2025	7/25/2025	Invoice Approval in Progress

2. Follow the path Financials > Browse Contract Budgets > PO search > Purchase Order > **Invoices** tab to find all submitted invoice for the fiscal year and view the Invoice status. Click the pencil icon if you wish to access the invoice.



Reference	Agency	Program	Invoiced (Gross)	Payee Vendor	Invoice Deductions	Total Deductions	Invoiced (Net)	Creation Date	Original Submission Date	Service Start Date	Service End Date	Status
2025_Jul1-Jul31	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC				6/5/2025	6/5/2025	7/1/2025	7/31/2025	Canceled
Test123	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice	500.00	CAMBA INC			500.00	6/3/2025	6/3/2025	7/1/2025	7/25/2025	Invoice Approval in Progress

3. View the Invoice status directly in the **submitted Invoice**:



INV331627 - Invoice Test123 - CAMBA INC - 500.00 USD (Invoice Approval in Progress)

Invoice Header

Fiscal Year: 2026

Status: Invoice Approval in Progress

5.1 Invoice Statuses Explained

Here are the most important **Invoice Statuses** and what they mean, so you can easily track where your invoice is in the approval and payment process.

Invoice Status	What It Means	Who Can Take Action
Draft	The vendor created the invoice (clicked the Create Invoice button) and may or may not yet have worked on the invoice. The invoice has not yet been submitted.	Vendor
Invoice Approval in Progress	The vendor submitted the invoice (clicked the Submit Invoice button), and the invoice has now been sent to the appropriate Agency for review.	Agency
Approval in Progress	The Agency is actively reviewing the invoice.	Agency
Level 2 Payment Approval in Progress	There's a second level of approval for the invoice. At this step, the Agency is determining readiness to request invoice payment.	Agency
OK-to-Pay	The payment has been approved by the Agency.	No action required.
Disbursed	The payment has been issued to the vendor!	No action required.
Canceled	The invoice has been canceled. Canceled invoices cannot be restored.	No action possible. Invoices can be canceled by either the vendor or the agency.

6. Common Blocking Alerts: Invoices

Blocking alerts display when required fields are **missing** or **filled out incorrectly**.

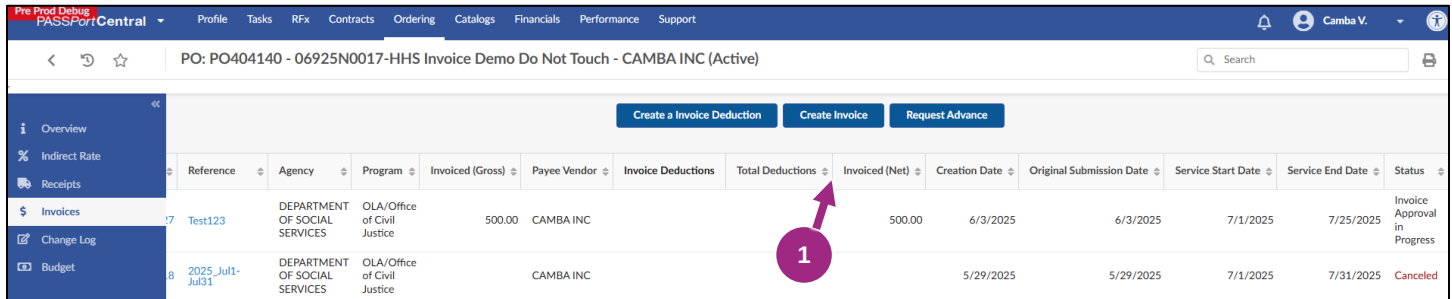
Learn what they mean and how to fix them! Also check out the [Invoices FAQs](#)!

- **Blocking Alert: “Please add item(s) under “Product and Services”**
 - **Reason:** Displays initially on all invoices after clicking Save.
 - **Solution:** At least one invoice line must be entered in the **Products/Services** table.
- **Blocking Alert: “The selected PO Budget item is flagged as non-invoiceable.”**
 - **Reason:** The budget line selected is not marked as Invoiceable.
 - **Solution:** Select only Invoiceable budget lines to invoice against, as shown by a check in the **Invoiceable?** column.
 - **Note:** If you think a line or lines should be marked Invoiceable, or there are no lines marked Invoiceable in the Purchase Order, please contact the Agency.
- **Blocking Alert: “The Invoice Service Dates are not within the start and end date of the Invoice Fiscal Year”**
 - **Reasons:**
 - Displays initially on invoices after adding an invoiceable item.
 - You may have selected the wrong Purchase Order in the contract (i.e., FY25 PO instead of FY26 PO).
 - Your service dates cross the June 30/July 1 Fiscal Year boundary.
 - **Solutions:**
 - Add Service Dates that fall within the POs Fiscal Year.
 - Select the correct Purchase Order.
 - Submit two smaller Invoices against two separate Purchase Orders.
- **Blocking Alert: “Either Invoice Amount or Invoice Value must have a dollar amount greater than zero”**
 - **Reason:** Displays initially on all invoices after adding the Item Label and clicking Save.
 - **Solution:** The Invoice Amount **or** the Invoice Quantity must be entered.
- **Blocking Alert: “The Invoiced Value must be less than or equal to the Remaining Item Value of the linked PO Budget item”**
 - **Reason:** The amount entered in the invoice is greater than the amount available on the budget item.
 - **Solutions:**
 - Leave the Invoice Value field **blank** unless otherwise directed to do so.
 - If the Invoice Value field is blank already and the alert still displays, be sure to only invoice against a specific item up to the **Remaining Amount**.
 - If the Remaining Amount for a particular item is not large enough, contact your Agency for guidance.

7. Export Data: Invoices

Invoice details can easily be exported from the relevant table in PASSPort.

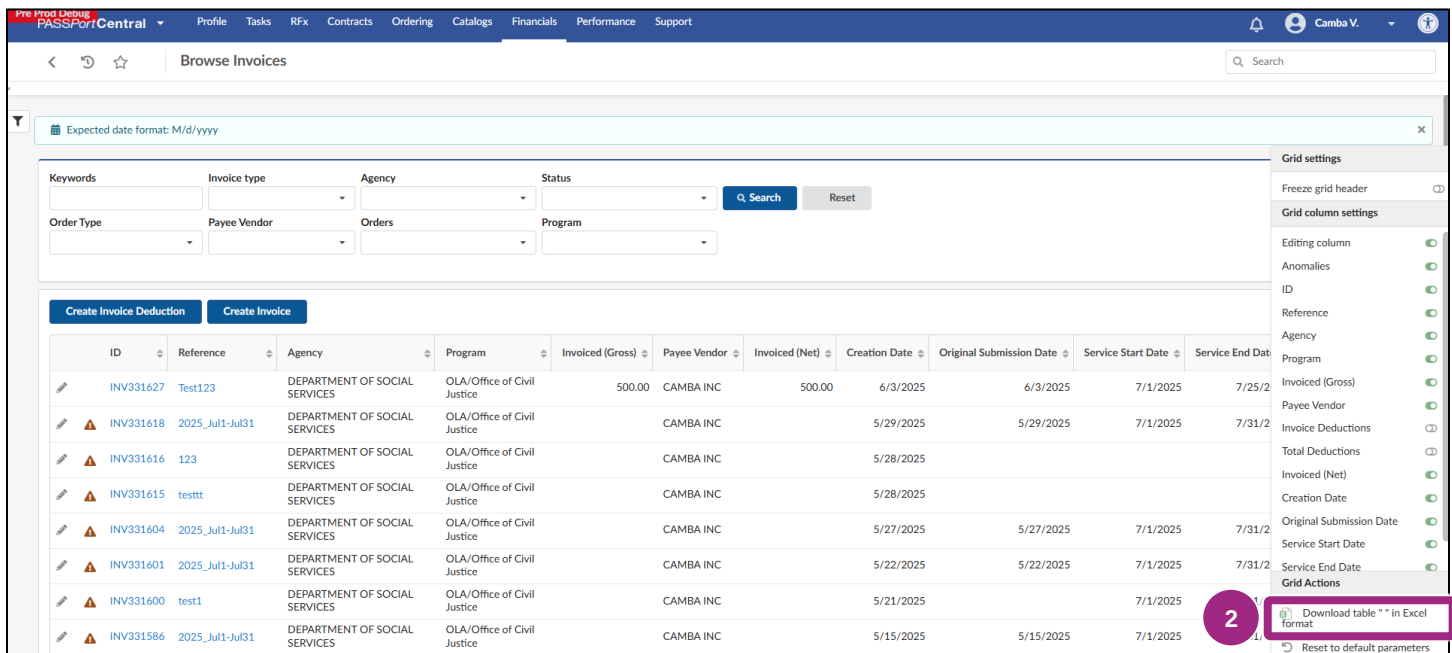
1. Right-click anywhere in the table's column header.



Reference	Agency	Program	Invoiced (Gross)	Payee Vendor	Invoice Deductions	Total Deductions	Invoiced (Net)	Creation Date	Original Submission Date	Service Start Date	Service End Date	Status
7 Test123	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice	500.00	CAMBA INC			500.00	6/3/2025	6/3/2025	7/1/2025	7/25/2025	Invoice Approval in Progress
8 2025_Jul1-Jul31	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC				5/29/2025	5/29/2025	7/1/2025	7/31/2025	Canceled

A table settings menu displays.

2. Click Download table in Excel Format.



ID	Reference	Agency	Program	Invoiced (Gross)	Payee Vendor	Invoiced (Net)	Creation Date	Original Submission Date	Service Start Date	Service End Date
INV331627	Test123	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice	500.00	CAMBA INC	500.00	6/3/2025	6/3/2025	7/1/2025	7/25/2025
INV331618	2025_Jul1-Jul31	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC		5/29/2025	5/29/2025	7/1/2025	7/31/2025
INV331616	123	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC		5/28/2025			
INV331615	testtt	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC		5/28/2025			
INV331604	2025_Jul1-Jul31	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC		5/27/2025	5/27/2025	7/1/2025	7/31/2025
INV331601	2025_Jul1-Jul31	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC		5/22/2025	5/22/2025	7/1/2025	7/31/2025
INV331600	test1	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC		5/21/2025		7/1/2025	
INV331586	2025_Jul1-Jul31	DEPARTMENT OF SOCIAL SERVICES	OLA/Office of Civil Justice		CAMBA INC		5/15/2025	5/15/2025	7/1/2025	

For more detailed instructions, refer to the [Download PASSPort Data](#) guide.

8. Best Practices: Submitting Invoices

- **Upload all necessary files with your invoice.** Missing documentation is the most common reason for invoice rejections!
- **Study your Agency's Fiscal Manual carefully** to understand invoicing and payment requirements, including deadlines. Fiscal Manuals can typically be found on the Agency's website. Fiscal policies may change, so check regularly for the latest version.
- **Save all expense receipts** and convert them to electronic version by using a scanner. Many printers and smart phones offer scan functionality. On many smartphones, you can use the Notes app or a similar tool to scan and save documents.
- **Invoice off the correct budget:** Take care to submit invoices towards the correct active PO, budget, and line item to avoid invoice rejections.
- **Do not invoice twice for the same expenses.** Duplicative invoices slow down approvals.
- **Split Invoices by Fiscal Year:** If services span multiple fiscal years, submit separate invoices for each fiscal year's PO.
- **Track your Invoice:** Monitor invoice status and check your email for any system notifications or required actions (e.g., invoice requires revision).
- **Submit Invoice deductions only** if your contracting Agency specifically requests them. For invoice errors, ask if the Agency can return the invoice for correction instead.