digitalAGENCY™

SDS Empower

Individual/Family Portal User Guide

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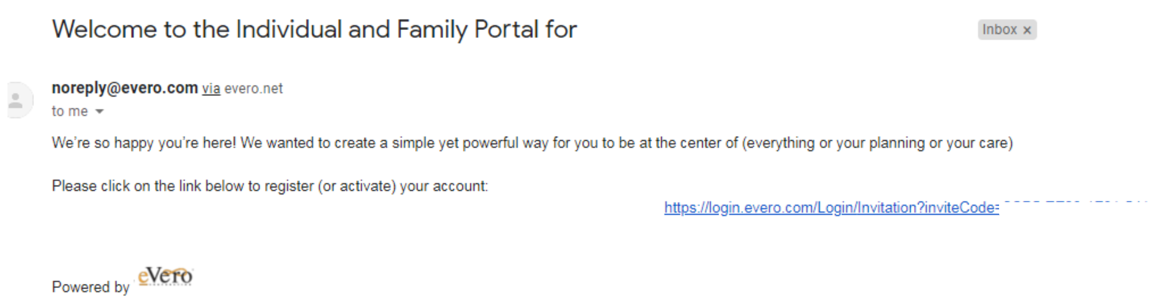
CONTENTS

OVERVIEW AND GOALS FOR INDIVIDUAL/FAMILY PORTAL USER GUIDE

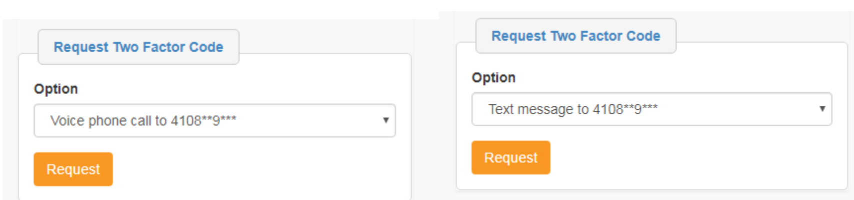
The Individual/Family Portal is a way for people receiving self-direction services to have complete oversight of their budget in real-time. MyeVeroPortal is a portal to view all budget information, input any potential invoices for reimbursement, view the staff /billable service documentation for self-hired programs, and broker invoices in an electronic fashion. The portal will offer transparency into where your FI agency is with all individual invoices/receipts, opening up communication in a simplified way. You can electronically review documentation and hours worked to better see how your budget is being spent. The FI agency will review settings with you to ensure your comfort, and allow you to move from paper approvals, to electronic approvals, as you become comfortable with the technology.

MYEVEROPORTAL ONBOARDING

During the initial set up of your account, the FI agency will be generating an email for you.



Once you receive the email, you can click the link, which will prompt you to select to receive either a text or voice call to verify your identity through the use of the matching phone number.

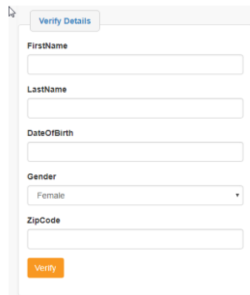


After selecting an option, you will receive either a text or voice call with a code. Enter the 6-digit code in the next window:

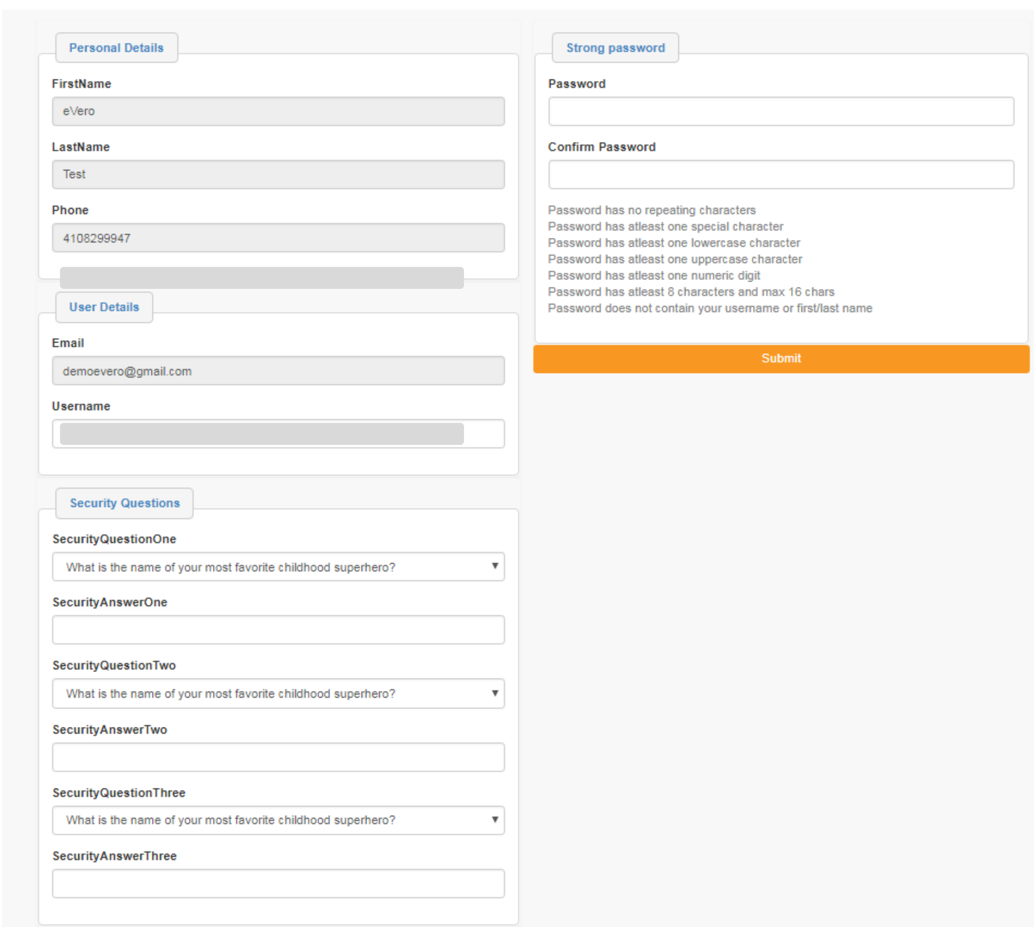
This step confirms that you have the phone number associated with the account.

This is an important step which allows us to take your personal information seriously and ensure HIPAA compliance. The process may appear daunting at first, but please be assured it is only to allow us to make sure we have the right person requesting and entering the portal.

Now that you have entered in the code, you will find the Verify Details screen presented next. Please be sure to match the details that the FI used to create the account.



You can create your own username and password. The screen will walk you through selecting 3 security questions so that you can reset your password if you forget what you've selected. The password must meet some criteria which are spelled out on the screen for you. (Your phone number and email address will not be able to be altered during this process.)



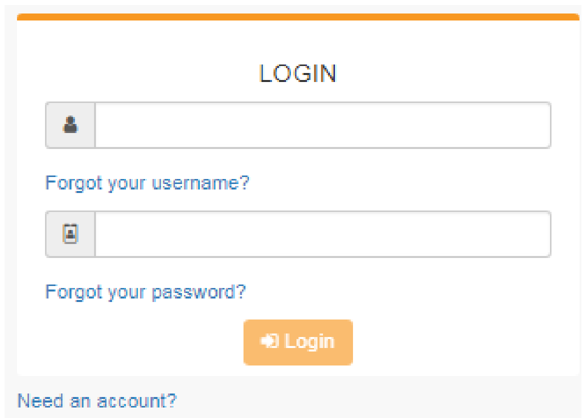
LOGGING IN

Congratulations! Your account has been successfully created!

To log in – please go to **MyEveroPortal.com**

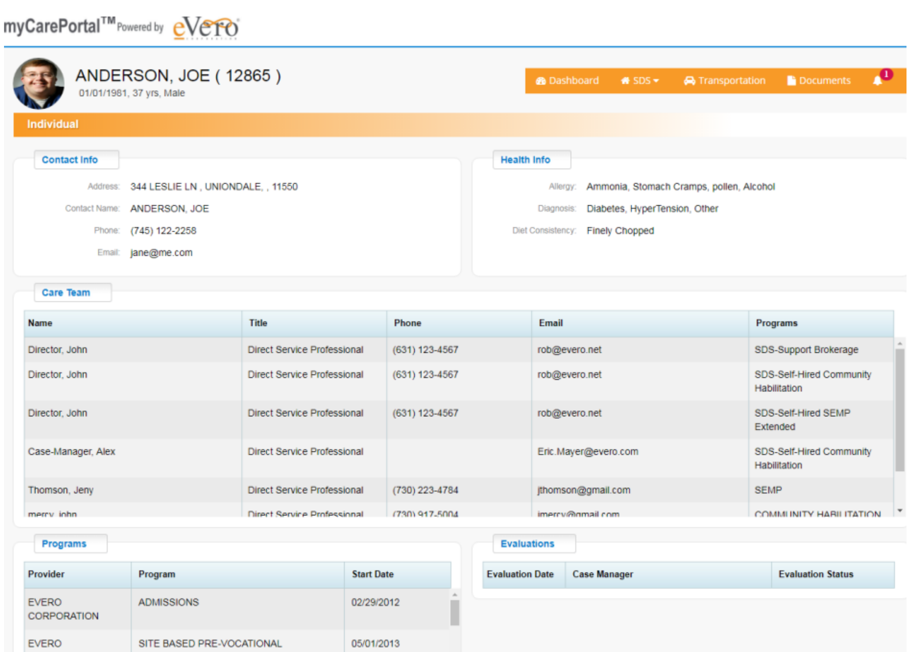
Once you are here – you will be redirected to a login page. It's very important that you enter through myeveroportal originally, so please bookmark that one!

You will this see a login page where you can enter your new username and password.



NAVIGATION WITHIN THE PORTAL

You've logged in, now what? The portal is a way to view all the information about your budget, staff and more from one location.



MAIN DASHBOARD

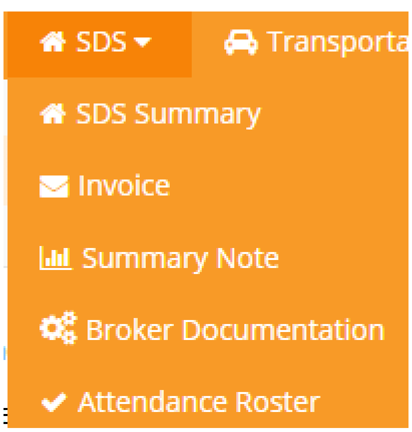
The key components of the main dashboard will include basic contact information for the person supported, basic health information, care team information, program enrollment and evaluations.

- Care Team information – will include all members of the team who are connected to the person (i.e. Self-Hired Staff, FI contact, etc.)
- Programs – this will include all programs that have been authorized as part of the person's budget
- Evaluations – this will be where DSP Evaluations mandated by the state can be completed for the Self-Hired Staff working with the person supported

BEYOND THE MAIN DASHBOARD

Navigation around the site can be done by using the menu bar to the right side of the window.

The SDS section will be where all information about the Self-Direction Budget and more will be available.



SDS SUMMARY

The SDS Summary section will be where you can easily find the following:

BUDGET LIST

You can click into the budget by clicking the ID on the left. You can indicate that you have reviewed it by using the checkbox on the right-side.

Budget List

Budgets

BudgetID	Effective Date	Budget Type	Authorized Amount	Calculated Amount	Status	Individual Reviewed
457	01/01/2018	ANNUAL	$214,870.00	$210,097.00	Approved	

SERVICE PLAN

This is where you can view the Habilitation Plans for Community Hab or Supported Employment (SEMP) – to view click on the effective date on the left.

Service Plan

Effective Date	Program	End Date	Type	Status
03/17/2017	SDS-Self-Hired Community Habilitation	03/31/2017	Annual Plan	

BROKER AGREEMENT

This is where you can view the Broker Agreement between the person supported and the broker, again to view, click on the date link on the left.

Broker Agreement

Effective Date	Broker Name	End Date	Rate	Amount	Status
01/01/2018	DIRECTOR, JOHN	11/23/2017	$40.00	$1,200.00	

MONTHLY EXPENDITURE REPORT

This is where each month; your FI will approve a document that shows what you have spent during the course of that month. Click on the Month/Year Link on the left to view.

Monthly Expenditure Report

Summary Date	IDGS	Total	Status
Apr 2018		$0.00	
Total	**$0.00**	**$0.00**	

BROKERAGE BILLING SUMMARY

This section will show you the billable services provided by the Broker in a set period of time (timeframes are set by the FI Agency). Click the Billing period on the left to see all documented information. This will be deducted from the budget from the brokerage section.

Brokerage Billing Summary

Billing Period	Broker Name	Duration	Unit	Amount	Payment Status	Summary Status
01/28/2018- 02/03/2018	DIRECTOR, JOHN	2 hrs 0 mins	8	$80.00	Exported	

BUDGET DETAILS

This section will show you a year-to-date real-time balance of all allocated money in the budget. You can see the budgeted amount, amount spent and the balance.

Budget Details

Program	Amount	Amount Spent	Balance
DAY HABILITATION	$14,015.40	$10.00	$14,005.40
COMMUNITY HABILITATION	$24,200.00	$0.00	$24,200.00
SDS-Individual Directed Goods & Servi...	$17,887.00	$939.27	$16,947.73
SEMP EXTENDED	$11,535.00	$10.00	$11,525.00
SDS-Family Reimbursed Respite	$3,000.00	$2.22	$2,997.78
SDS-FSS	$10,440.00	$0.00	$10,440.00
SDS-Other Than Personal Service Items	$2,900.00	$134.75	$2,765.25
SDS-Agency Supp Community Habilita...	$24,107.50	$0.00	$24,107.50
SDS-Agency Supp Respite	$6,522.30	$0.00	$6,522.30

For programs like IDGS that have multiple categories within, you can click the icon in the top right corner of that box to show a summary of the balance of categories.

Additional Amount

Additional Amount

Program: SDS-Individual Directed Goods & Services

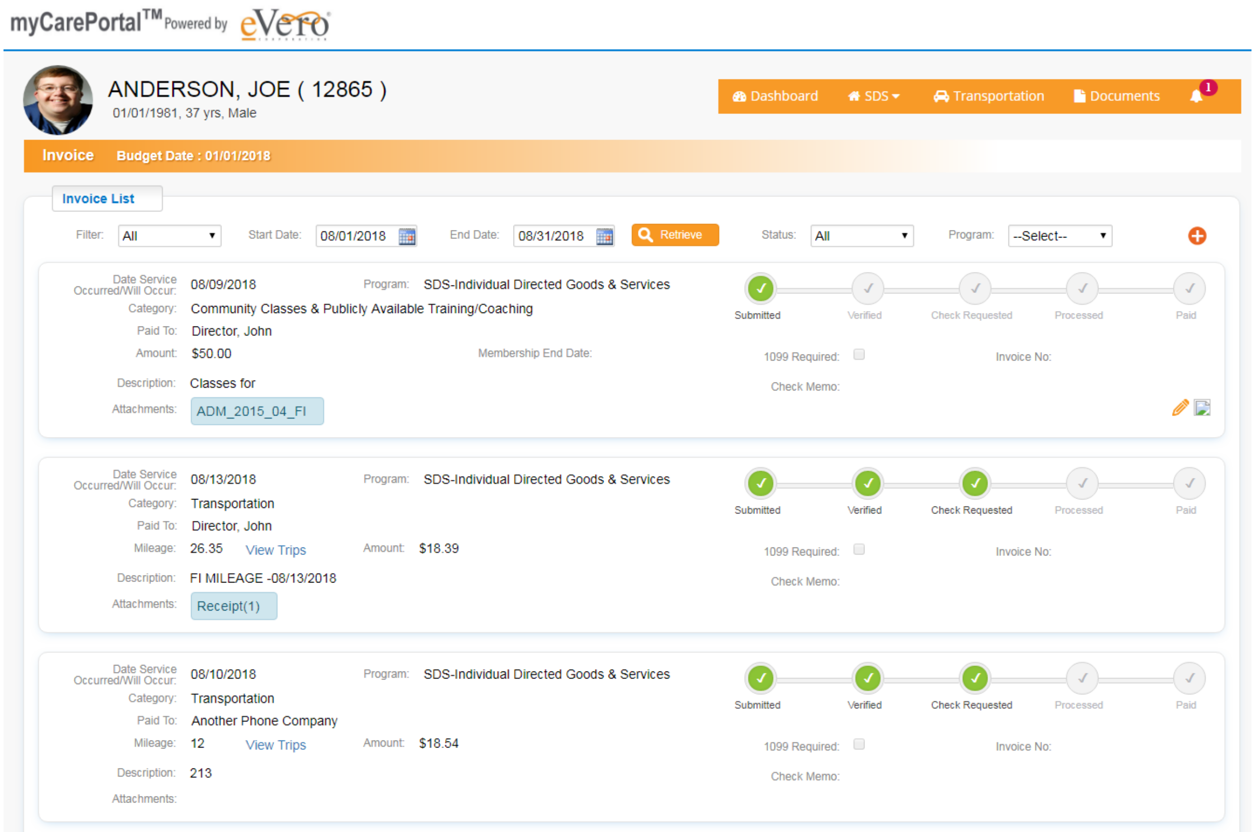
Carry Over Amount: 8.9

Program/Category	Budget Amount	Amount Paid	Payment Pending	Additional Amount	Reimbursement Amount	Balance Amount	Balance %
Camp	$3,000.00	$159.00	$22.22	$10.00	$0.00	$2,808.78	93.63 %
Community Classes & Publicly Available Training/Coaching	$13,000.00	$0.00	$1.00	$0.00	$0.00	$12,999.00	99.99 %
Health Club/Organizational Memberships/Community Participation	$1,137.00	$0.00	$0.00	$0.00	$0.00	$1,137.00	100 %
Transportation	$750.00	$500.45	$246.60	$0.00	$0.00	$2.95	0.39 %
			Total:	**$10.00**	**$10.00**		

Cancel

INVOICES

The invoice tab will take you to the invoice section where you can view and see all requested reimbursements, etc. against all categories in your budget.

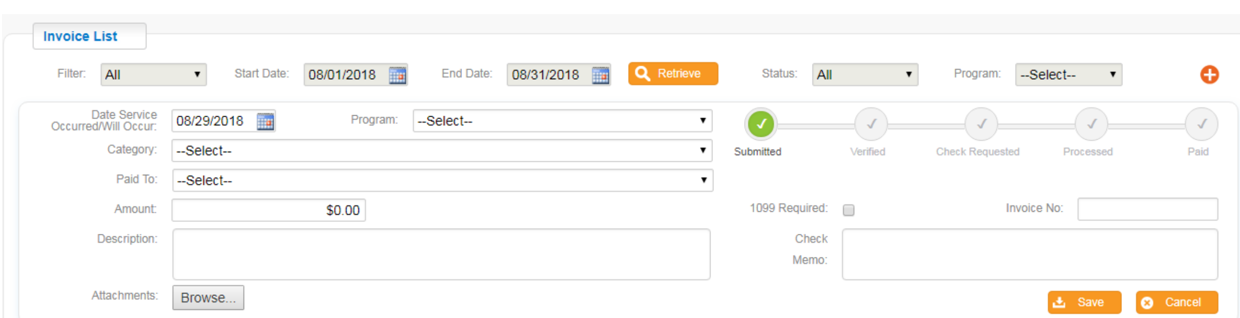


You will notice that the Invoices are entered individually, so that the FI Team can be sure they have all the information necessary to reimburse/pay the appropriate person, and bill efficiently.

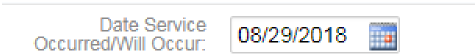
ENTERING IN A NEW INVOICE

To enter in a brand new invoice request, you will locate the orange + in the right hand corner.

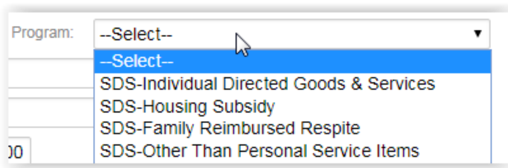
Click the button and a new empty box will open up:



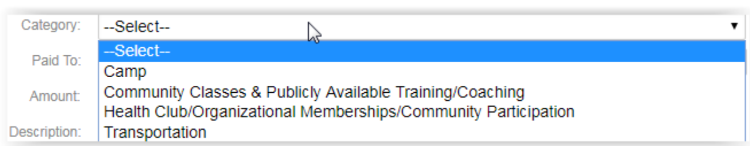
Select the Date the Service Occurred or Will Occur (it could be a future end date, or the date of the receipt, last day of a class/camp, etc.)



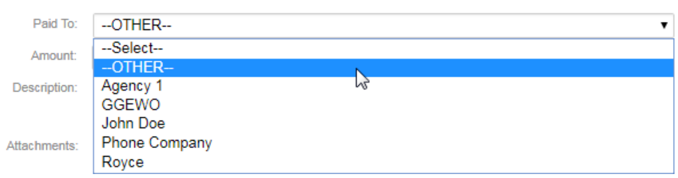
Select the program from the drop down. Please note that only programs authorized in the budget will be available in the drop down.



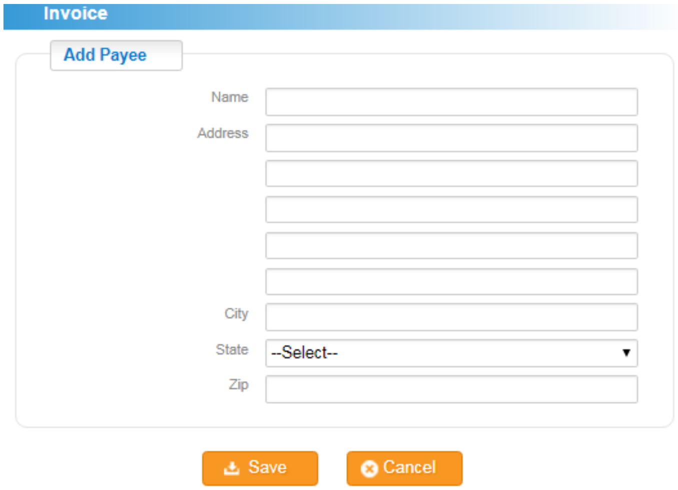
Select the Category appropriate for the requested invoice. The system will limit your request based on the amount remaining in your budget, so it will be best to be as accurate as possible. Your FI Team can support you or make changes to this if you are unsure. The categories will only reflect those authorized in the budget.



Select "Paid To" – this is who the check will be made out to, so it could be you, or a specific vendor (only if that vendor has been cleared by your FI Team). If you do not see the vendor in the drop down list, you can pick --OTHER-- and then click the Magnifying glass.

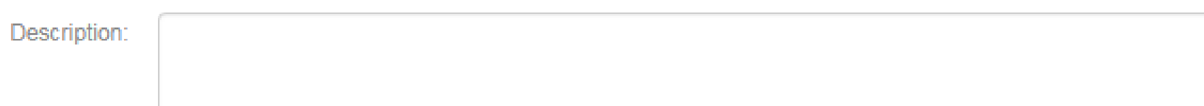


A Payee List will come up where you will click the Plus sign to add a vendor. Your FI will then be able to match the vendor to a list that they have or create a new vendor.

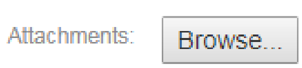


The Amount is going to be validated against the amount of money remaining in the budget for that particular program/category. Please be sure to check this against the receipt.

Description is a required field and should be used to indicate more details about the invoice to help the FI understand what is being requested.

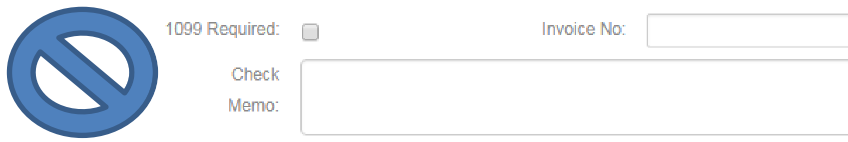


Attachments: There is a browse button that will allow you to upload an attached PDF or image file. The items attached should provide proof for the invoice to be paid. Please try to be sure the image is as clear as possible.



When you click Browse, be sure to select the location where that file is saved. Note- it's best to save it with a name that makes sense to help you upload to that invoice. If you have multiple pages or receipts, you can continue to select browse to add more until all are uploaded.

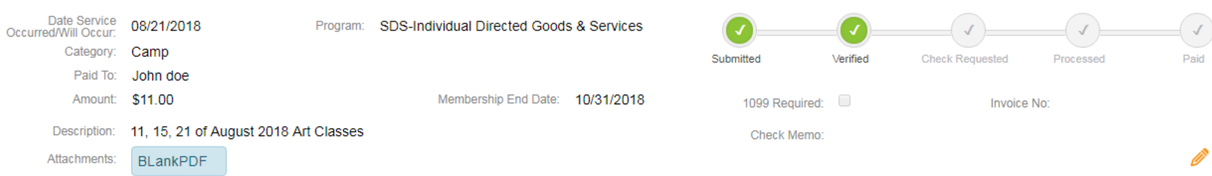
The 1099 Required, Invoice No, and Check Memo are all the responsibility of the FI Team and should be left as is.



Once complete, click the Save Button on the bottom right.

UNDERSTANDING THE GREEN CHECKBOXES (WORKFLOW)

The green checkboxes next to the invoice will explain the workflow of the invoice, in going from you to the FI Team, to getting the check cut. You can hover over each of the green checks to see the date and time stamp of when it was moved into that category. Hovering over any category will show you the date/time/user who completed the action in the workflow.



SUBMITTED

The submitted check mark means that you have saved the invoice and it is queued up and waiting for review from your FI Team. This is the only status that you can continue to make changes to, by clicking the pencil in the bottom right hand corner to edit and then click save.

VERIFIED

The verified status indicates that the FI Team has reviewed the invoice and has agreed that everything is valid. At this point they will channel through their internal processes to queue up for payment.

CHECK REQUESTED

The check requested status indicates that the FI Team has requested the check be cut and has queued up in their Finance department to do so.

PROCESSED

The processed status indicates that the information has been sent to the accounts system for payment to be cut.

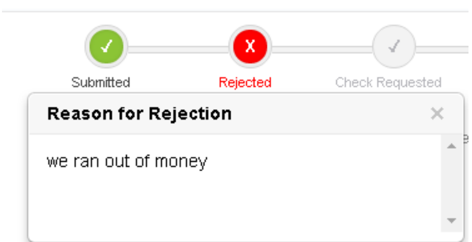
PAID

The Paid Status indicates that the check has been cut.

REJECTED

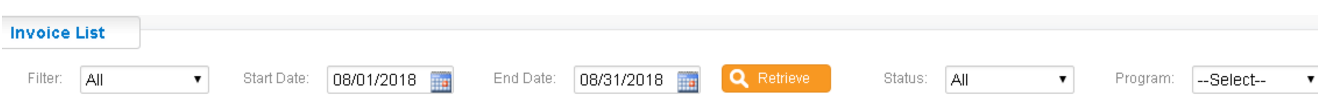
If an invoice is rejected for some reason, the FI Team will let you know why through notes that the write back to you. You will see this as a Red X instead of a green check.

Click on the WORD Rejected to see the comment of why the item could not be paid.

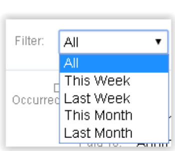


REVIEWING PREVIOUSLY ENTERED INVOICES

Invoices can be checked on using the filters at the top of the page to locate them easily.

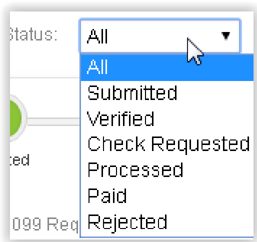


The first filter will allow you to sort by a set time frame:

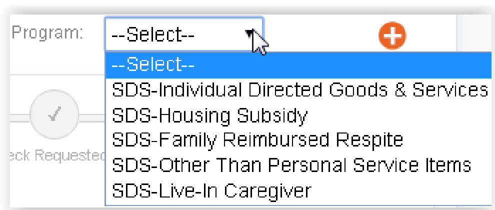


You could also change the date range with the next fields:

Another option would be to sort by the status:



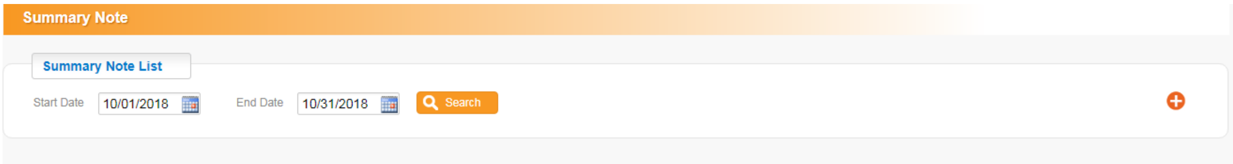
Finally, you can also sort by Program (only those authorized in budget will be shown):



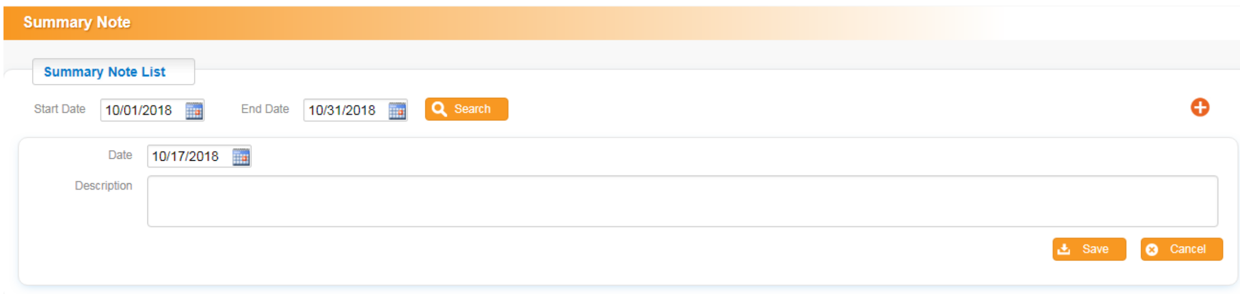
Be sure that after selecting any filter you click on the Retrieve button to refresh the page.

SUMMARY NOTE

The Summary Note section is a place where you can indicate progress or issues with goals, etc. The information is shared with the FI Team.



Click the Plus Sign to enter information:



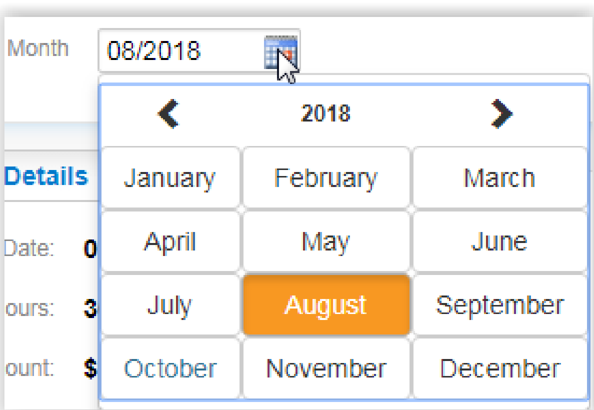
Adjust the date to the appropriate day (it will default to the current date).

Click Save when Complete

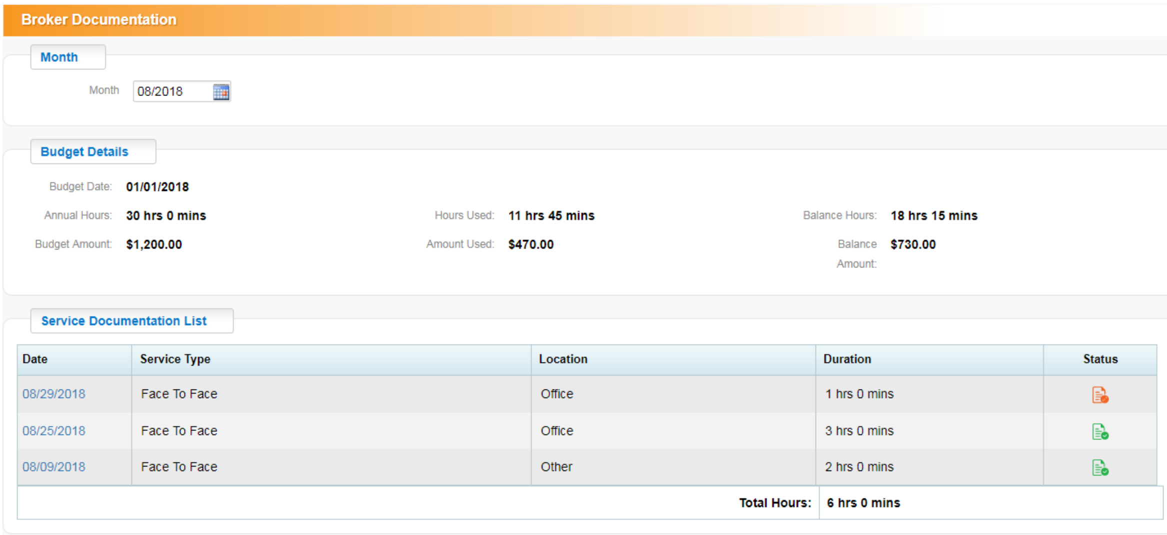
BROKER DOCUMENTATION

The Broker Documentation Section is a place to review all documentation and notes entered by the broker and to get details on the amount remaining in the budget.

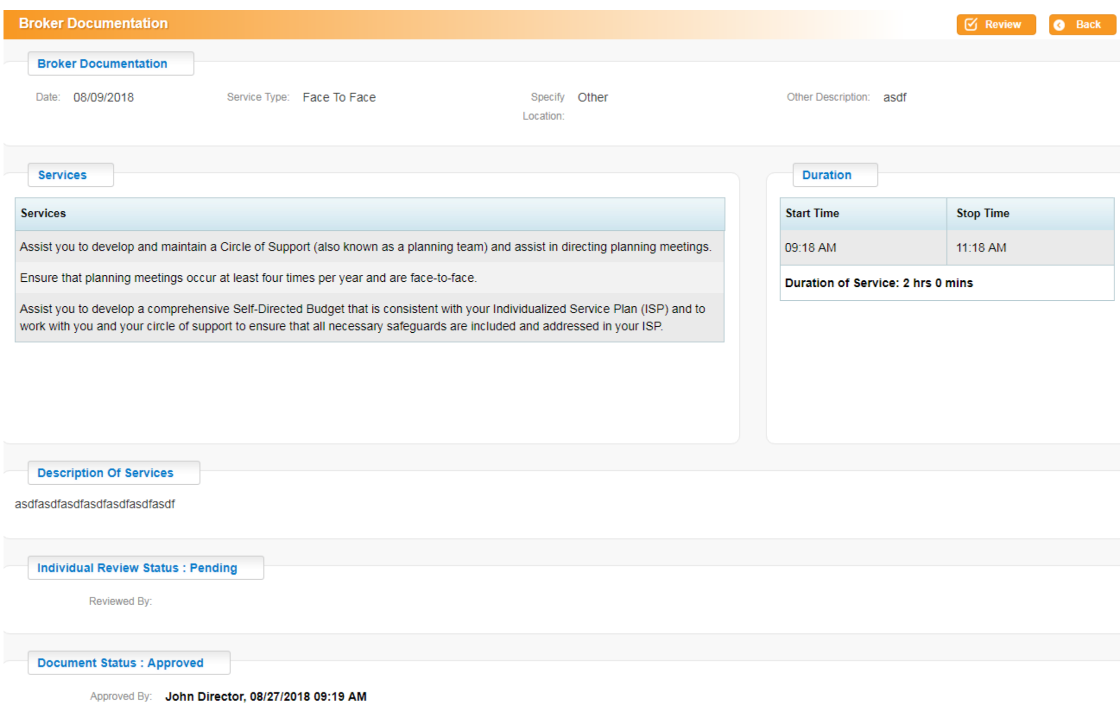
Click the calendar icon to switch the month view.



Click the date you wish to read to review, by clicking the date link on the left side.

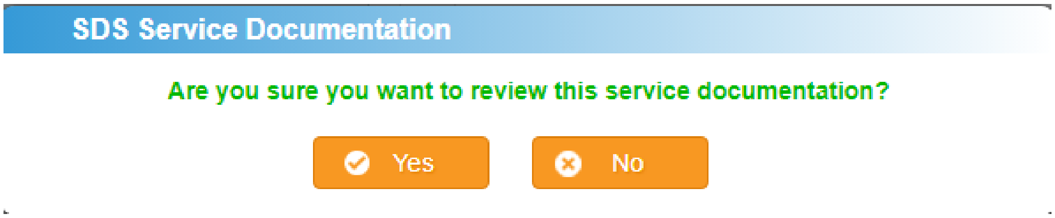


Once you click the date, it will open to the full details of the service provided by the broker.

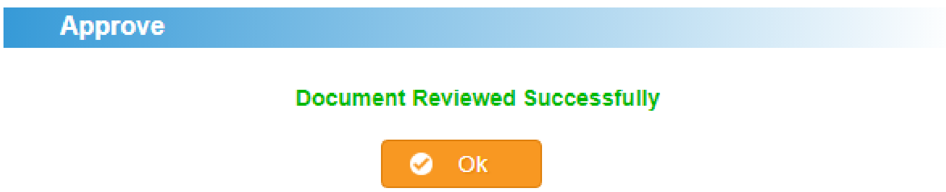


Click the Review button located either at the top right corner of the screen or the bottom middle of the screen.

A pop up will ask if you are sure you would like to review the documentation. If you are good with the documentation, click yes.



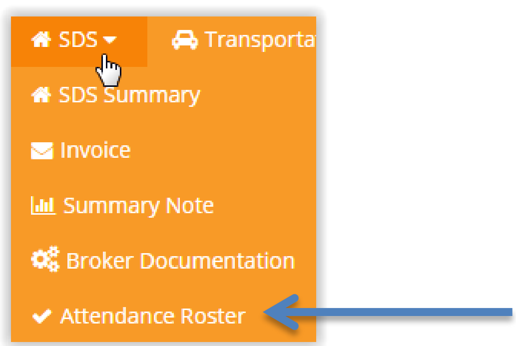
After clicking yes, a pop up confirming your approval will appear.



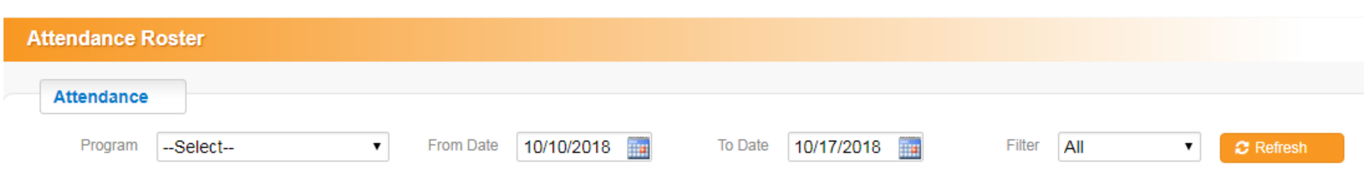
Click Ok to close. Click Back to return to the previous screen.

ATTENDANCE ROSTER

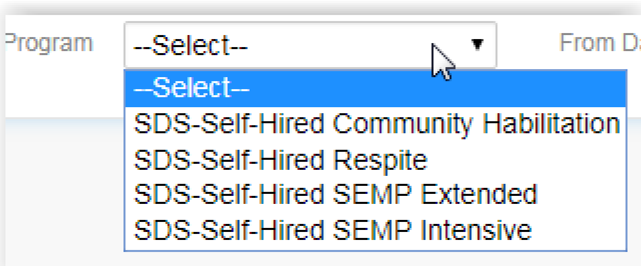
The Attendance Roster screen is to review all billable time provided by staff. Click on the category from the SDS Menu at the top of the Portal.



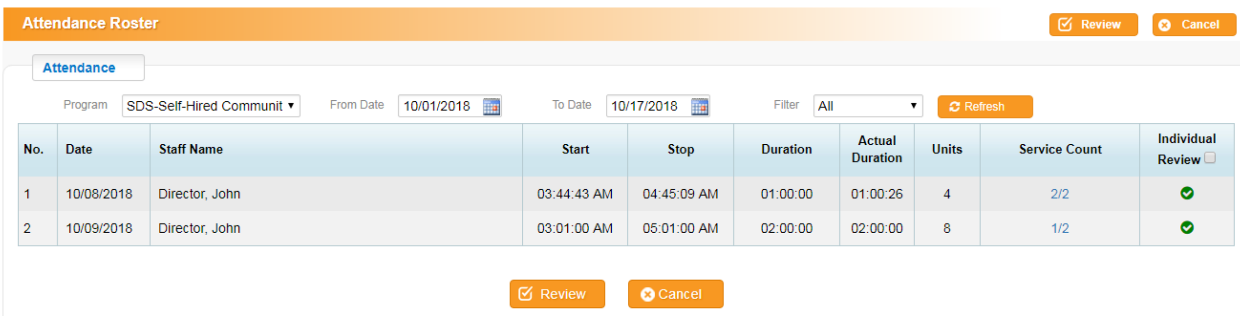
Select the program from the drop down and adjust the date range you wish to review. Please note that you should not extend the date range more than 1 month to avoid slowness in loading the information.



Only programs the person is currently enrolled in will show in the drop down.



Click the Refresh button to refresh the information, once you make your selections.



The information indicated includes:

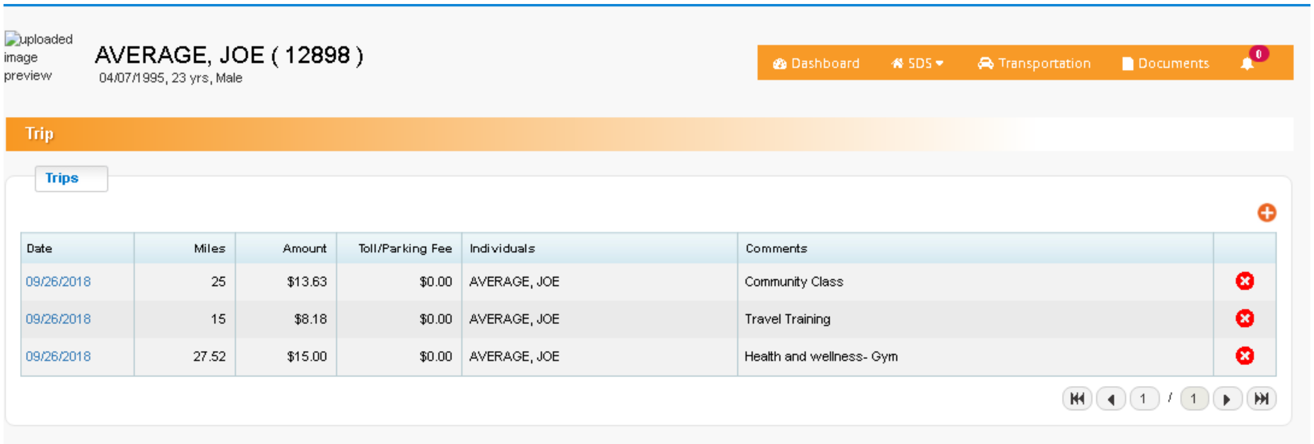
- Date of Service
- Staff who provided the service
- Start Time
- Stop Time
- Duration (real time)
- Billable Duration
- Number of Units
- Services – you can click the link to view comments and responses
- Individual Review Column – check the box if you agree with services provided

Once you check the boxes for the dates you agree with, click the Review button to confirm.

If you have questions about services provided, or disagree with them in any way, please contact your FI Team to let them know.

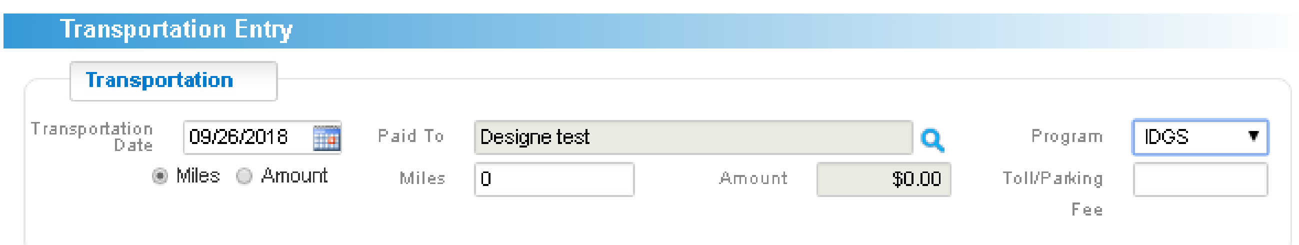
TRANSPORTATION/MILEAGE

The transportation tab will take you to the Trips section where you can view and see all requested reimbursements for travel expenses. This will include travel from IDGS and OTPS, pending what is authorized in the budget.



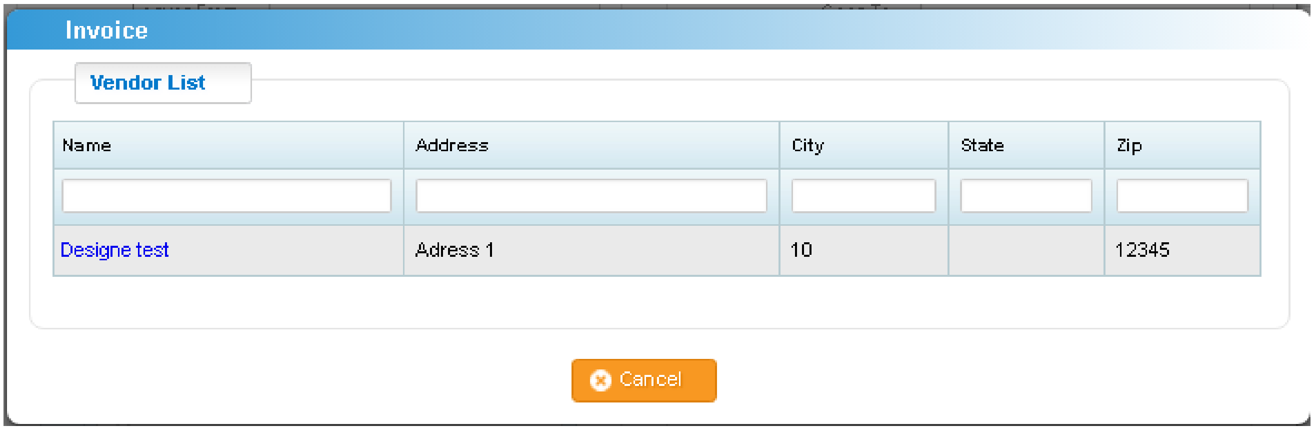
ENTERING IN TRASPORTATION REIMBURSEMENT

Transportation cost for Individual Directed Goods and Services (IDGS) and Other Than Personal Services (OTPS) will be entered through the "Transportation" tab on your main screen. You can then select the in the upper right hand side to begin entering in your transportation costs.

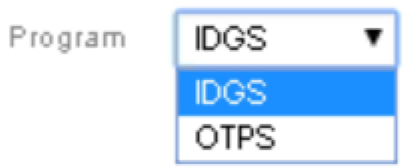


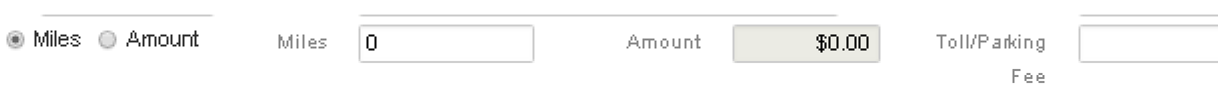
Begin by entering in the date that the service has occurred. The date will default to the current date, but can be changed by manually entering the date, or clicking the calendar and navigating to the date. The "Paid To" section will be defaulted to the identified person in the budget, but can include the individual's Designee(s) as well. Additional designee's will be set up by your FI team.

To change the “Paid To” section, click the icon. This will open up the current Designee list. Select the name to make the change and return back to the trip screen.



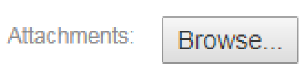
Select the program to be billed to by selecting the drop down arrow. You can enter only what has been authorized in the budget. Do not worry if you are unsure which program transportation is billed against. Your FI team can fix this change without delaying the process.



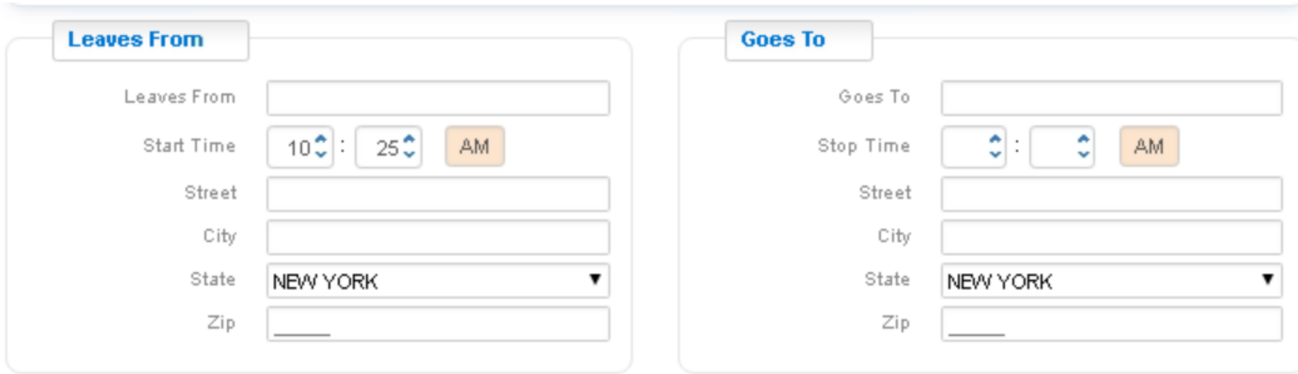


You have the ability to enter the cost based on amount of miles driven, or amount paid for transportation costs (Taxi, Uber, Train Bus, etc...). Whichever category you select will limit what you can enter in the following fields. For Miles, you enter the total amount of miles traveled, and it will automatically calculate the amount based on the FI’s reimbursement rate. If amount is selected, you will entered the total dollars spent on transportation. Either option will allow you to enter Toll/Parking fees if applicable.

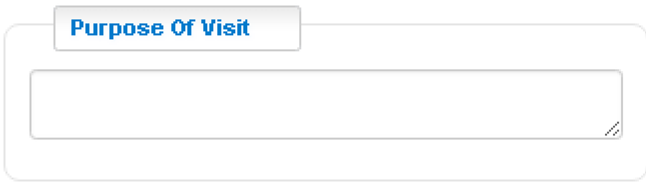
An additional requirement when claiming Amount reimbursement is the receipt.



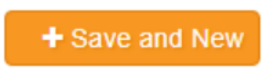
When you click Browse, be sure to select the location where that file is saved. Note- it’s best to save it with a name that makes sense to help you upload to that invoice. If you have multiple pages or receipts, you can continue to select browse to add more until all are uploaded.



The following section will be your From and To destinations. These sections are free type, and you can enter the address of both locations accordingly.



The purpose of visit is a required element that helps identify why the travel occurs, and ties back to an individual's goals. This can also help identify which billing category (IDGS or OTPS) the travel falls under. Again, if misidentified, your FI team can make the change while reviewing the travel.

When complete, you can hit 

button to add additional travel costs or 

to return to the Trips screen.