

# Yedei Chesed eVero Training

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Participant/Designee Training



# How to Get Started

- An email was sent to create an account.
  - Select the orange Join MyeVeroPortal button
- There is a 2-step verification
  - You can choose either a text message or phone call.
  - You will get the text or call as soon as select the Request button, so if you Choose a call make sure to have a pen and paper ready to take down the number.
- Add the security code when prompted.

Welcome Pessy Rosenfeld-Test !

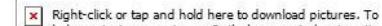
We're so happy you're here!

We created a simple yet powerful way for you to stay at the center of your care. Please join us on the MyeVeroPortal for individuals and families by clicking the button below. We want you to stay connected and in control of everything you're planning.

By the way, this invitation will expire on **11/4/2020** and is being sent to you on behalf of C.T.

[Join MyeVeroPortal](#)

Thanks,  
The eVero Team  
( and YEDEICHESED )



**Request Two Factor Code**

Option

Text message to 8454\*\*0\*\*\*

[Request](#)

**Request Two Factor Code**

Option

Voice phone call to 8454\*\*0\*\*\*

[Request](#)

# How to Get Started Cont.

- If this is the first time you are using eVero, select New Account
- If you have more than one participant who will be using eVero, such as siblings, and you have already created an account with eVero, select Existing Account

## New Account

If you do not have an existing account with eVero. We offer an option of creating a new one set of credentials.

[Click here to create one.](#)

## Existing Account

If you have an existing account with eVero. You can enter your credentials to merge/support them here.

[Click here to merge your credentials.](#)

# How to Get Started for New Account

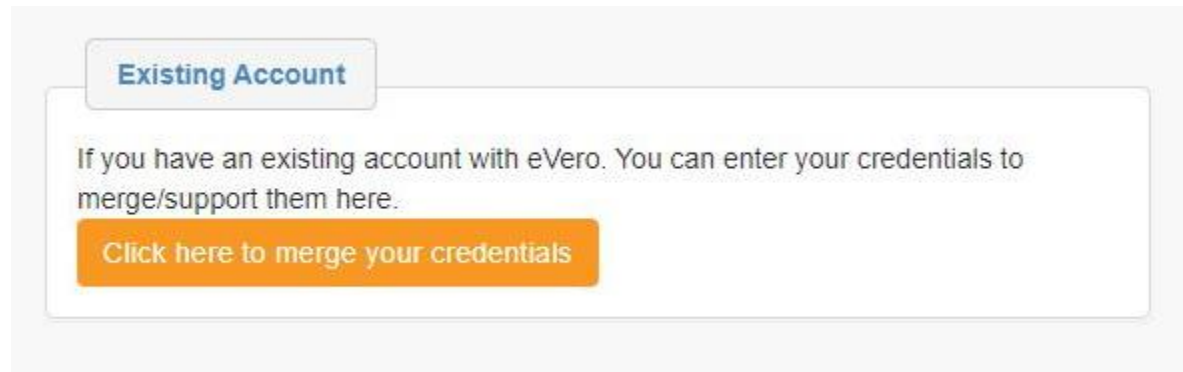
- For first time eVero users that have selected, New Account, follow the prompts to fill out the following information:
  - Username
  - 3 security questions
  - Password
- The Personal Details and Email are set and can not be changed.
  - If any changes are needed please reach out to us and we will update the information for you

The screenshot displays a multi-step account creation form. It is divided into four main sections:

- Personal Details:** Contains input fields for 'FirstName' (filled with 'Pessy'), 'LastName' (filled with 'Rosenfeld-Test'), and 'Phone' (partially obscured by a yellow bar).
- User Details:** Contains an 'Email' field (filled with 'pessy.rosenfeld@yedei.org') and an empty 'Username' field.
- Security Questions:** Features three identical questions: 'What is the name of your most favorite childhood superhero?'. Each question has a dropdown menu and a corresponding text input field for the answer.
- Strong password:** Includes 'Password' and 'Confirm Password' fields. Below these fields, a list of password requirements is shown: 'Password has no repeating characters', 'Password has atleast one lowercase character', 'Password has atleast one uppercase character', 'Password has atleast one numeric digit', 'Password has atleast 8 characters and max 16 chars', and 'Password does not contain your username or first/last name'. An orange 'Submit' button is located at the bottom of this section.

# How to Get Started for Multiple Participants

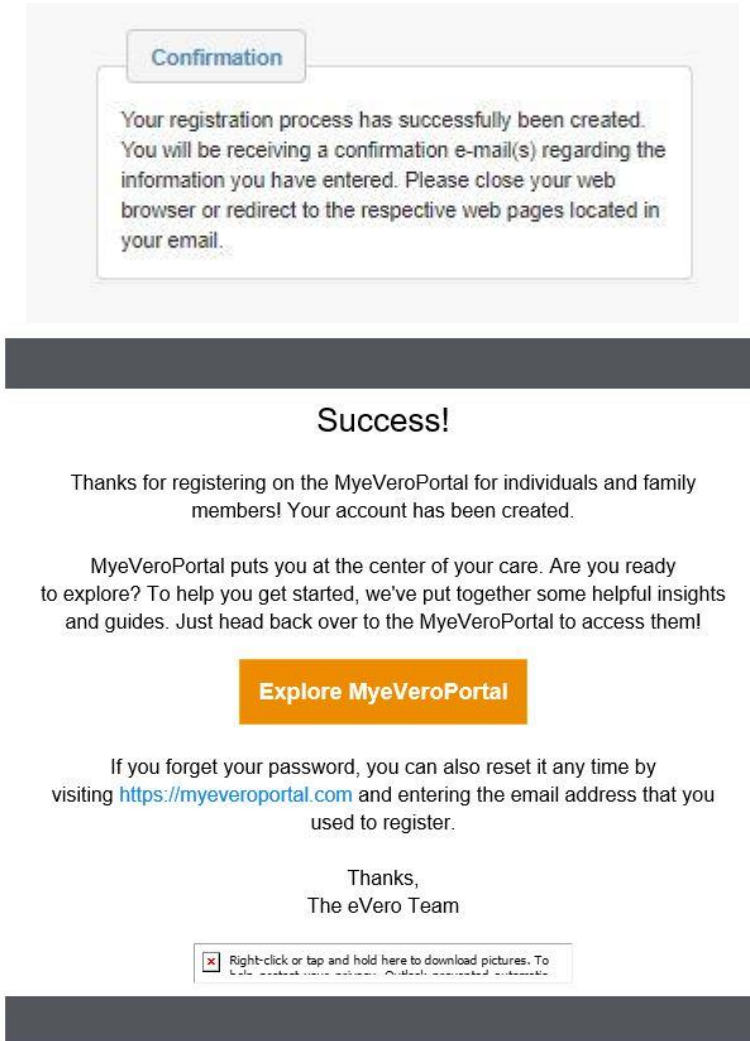
- Instead of having multiple log-Ins, Participant account's can be linked under one Log-In
- Using the link from email regarding the next Participant, select Existing Account to merge Log-In information.



- This can be used for multiple agencies as well.
- Log-In using previous information.

# How to Get Started Cont.

- Once you select Submit, a confirmation screen will appear.
- An email will then be sent confirming your connection with the Participant.
- Select the orange Explore MyeVeroPortal.
  - This will direct you to [myeveroportal.com](https://myeveroportal.com)
- Using the Username and Password created, you can now log on to eVero.
  - On the first Log-In the End user Services Agreement will need to be agreed to.



**Confirmation**

Your registration process has successfully been created. You will be receiving a confirmation e-mail(s) regarding the information you have entered. Please close your web browser or redirect to the respective web pages located in your email.

**Success!**

Thanks for registering on the MyeVeroPortal for individuals and family members! Your account has been created.

MyeVeroPortal puts you at the center of your care. Are you ready to explore? To help you get started, we've put together some helpful insights and guides. Just head back over to the MyeVeroPortal to access them!

**Explore MyeVeroPortal**

If you forget your password, you can also reset it any time by visiting <https://myeveroportal.com> and entering the email address that you used to register.

Thanks,  
The eVero Team

Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

# Dashboard for Multiple Participants

- If the account has access to multiple Participants linked, they will all show up on the first screen.
  - It will display the Provider, Program, and Effective date according to the budget..

The screenshot displays a dashboard for two participants. The first participant is Casey, and the second is Pessy. Each participant's data is presented in a table with three columns: Provider, Program, and Effective Date.

Participant	Provider	Program	Effective Date
Casey	YEDEI CHESED	Fiscal Intermediary	7/1/2018
	YEDEI CHESED	SDS-Support Brokerage	7/1/2018
	YEDEI CHESED	SDS-Self-Hired Community Habilitation	11/1/2019
	YEDEI CHESED	SDS-Individual Directed Goods & Services	11/1/2019
	YEDEI CHESED	SDS-Family Reimbursed Respite	11/1/2019
	YEDEI CHESED	SDS-Other Than Personal Service Items	11/1/2019
	YEDEI CHESED	EXTERNAL CARE COORDINATION	11/1/2019
	YEDEI CHESED	SDS-Self-Hired Respite	10/1/2020
Pessy	YEDEI CHESED	Fiscal Intermediary	9/1/2020
	YEDEI CHESED	SDS-Self-Hired Community Habilitation	9/1/2020
	YEDEI CHESED	SDS-Self-Hired Respite	9/1/2020
	YEDEI CHESED	SDS-Support Brokerage	9/1/2020
	YEDEI CHESED	SDS-Individual Directed Goods & Services	9/1/2020
	YEDEI CHESED	SDS-Family Reimbursed Respite	9/1/2020
	YEDEI CHESED	SDS-Other Than Personal Service Items	9/1/2020
	YEDEI CHESED	EXTERNAL CARE COORDINATION	9/1/2020

- Selecting the name of one Participant will show the Participants individual Dashboard

# Dashboard

- The Main Page will display the Participants contact information and Health Information
- It will also display anyone that is linked with the participant.
  - This would include the Care Manager, Broker, FI Coordinator, Staff, and any other people that are linked to the account.
- The Programs show which programs are listed on the participants budget
  - This would include but not limited to FI, Broker, Com Hab, Respite, IDGS, OTPS and so forth.



# SDS – SDS Summary

- Will display all Services listed on the budget.
  - Amount Allowed – Amount listed on the budget
  - Amount Spent – Amount already paid since the budget year started
  - Balance – Amount left to spend
  - Pending Pay – Invoices that have been submitted, but not yet reviewed by Yedei Chesed
  - Pending Exp – Invoices have been processed by Yedei Chesed and waiting for payments to be processed
  - Proj. Balance – Amount = Balance - (Pending Pay + Pending Ex)



Budget Details

100% 09/01/2020

<b>100% DPPS - Children's After-S...</b>	<b>100% Fiscal Intermediary</b>	<b>100% SDS-Self-Hired Community...</b>
Amount Allowed: \$7,165.60 Amount Spent: \$0.00 Balance: \$7,165.60	Amount Allowed: \$7,800.00 Amount Spent: \$0.00 Balance: \$7,800.00	Amount Allowed: \$71,500.00 Amount Spent: \$0.00 Pending Pay: \$0.00 Pending Exp: \$0.00 Balance: \$71,500.00 Proj. Balance: \$71,500.00
<b>100% SDS-Self-Hired Respite</b>	<b>100% SDS-Support Brokerage</b>	<b>100% SDS-Individual Directed G...</b>
Amount Allowed: \$9,750.00 Amount Spent: \$0.00 Pending Pay: \$0.00 Pending Exp: \$0.00 Balance: \$9,750.00 Proj. Balance: \$9,750.00	Amount Allowed: \$1,200.00 Amount Spent: \$0.00 Balance: \$1,200.00	Amount Allowed: \$15,163.00 Amount Spent: \$0.00 Carry Over: \$0.00 Balance: \$15,163.00
<b>100% SDS-Family Reimbursed Res...</b>	<b>100% SDS-Other Than Personal S...</b>	<b>100% SDS-FSS</b>
Amount Allowed: \$3,000.00 Amount Spent: \$0.00 Balance: \$3,000.00	Amount Allowed: \$3,000.00 Amount Spent: \$0.00 Carry Over: \$0.00 Balance: \$3,000.00	Amount Allowed: \$1,000.00 Amount Spent: \$0.00 Balance: \$1,000.00

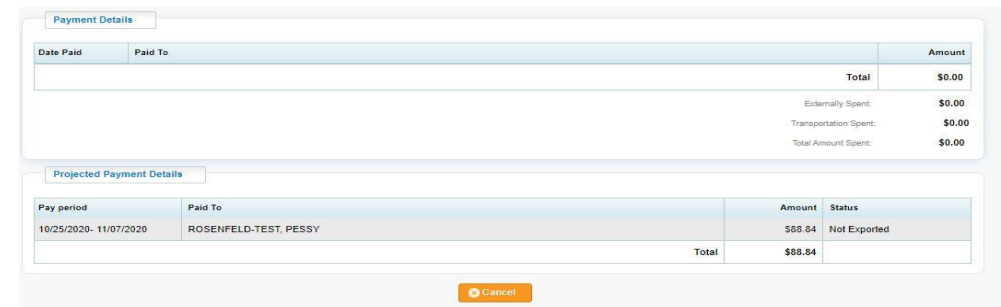
# SDS – SDS Summary Cont.

- Selecting the service will display any pending invoices.
- Self-Hired Staff will display date paid, and who it was paid to.
- Selecting IDGS, FRR, or OTPS will display all pending invoices



SDS-Self-Hired Community...

Amount Allowed:	\$71,500.00	Amount Spent:	\$0.00
Pending Pay.:	\$88.84	Pending Exp:	\$0.00
Balance:	\$71,500.00	Proj. Balance:	\$71,411.16



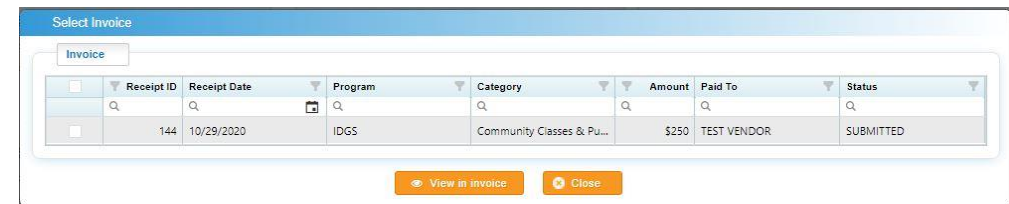
Payment Details

Date Paid	Paid To	Amount
		Total \$0.00
		Externally Spent: \$0.00
		Transportation Spent: \$0.00
		Total Amount Spent: \$0.00

Projected Payment Details

Pay period	Paid To	Amount	Status
10/25/2020 - 11/07/2020	ROSENFELD-TEST, PESSY	\$88.84	Not Exported
	Total	\$88.84	

Cancel



Select Invoice

Invoice

Receipt ID	Receipt Date	Program	Category	Amount	Paid To	Status
144	10/29/2020	IDGS	Community Classes & Pu...	\$250	TEST VENDOR	SUBMITTED

View in invoice Close

# SDS – SDS Summary Cont.

- Select the pen icon on the top right corner of a service
- This will display a detailed breakdown of the service
  - Budget Amount – Amount listed in the budget
  - Amount Paid – Amount that has already been paid by Yedei Chesed
  - Payment Pending – Amount that has been submitted to Yedei Chesed but not yet paid
  - Externally Spent – Amount spent in the budget year before joining eVero

100% SDS-Self-Hired Community ...

Amount Allowed: \$71,500.00      Amount Spent: \$0.00

Pending Pay: \$88.84      Pending Exp: \$0.00

Balance: \$71,500.00      Proj. Balance: \$71,411.16

Externally Spent

Externally Spent

Program: SDS-Self-Hired Community Habilitation

Program/Category	Budget Amount	Amount Paid	Payment Pending	Externally Spent	Reimbursement Amount	Balance Amount	Balance %
Com Hab Staff Pay	\$71,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$71,500.00	100
				Total:	\$0.00		

\* Service Discontinued.

Cancel

Externally Spent

Externally Spent

Program: SDS-Individual Directed Goods & Services

Program/Category	Budget Amount	Amount Paid	Payment Pending	Externally Spent	Reimbursement Amount	Balance Amount	Balance %
Community Classes & Publicly Available Training/Coaching	\$10,663.00	\$0.00	\$250.00	\$0.00	\$0.00	\$10,413.00	97.66
Health Club/Organizational Memberships/Community Participation	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	100
Household-Related Items and Services	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	100
Transportation	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	100
				Total:	\$0.00		

\* Service Discontinued.

Cancel

# SDS – SDS Summary Cont.

- Budget List
  - PDF version of the latest approved budget.
  - Can be download as an excel budget as well.
- Service Plan – Current Staff Action Plan
- Monthly Summary List – Monthly Summary that Staff fill out at the end of each month
- Broker Agreement
- Monthly Expenditure Report – Once Yedei Chesed signs the Report.
  - Once Yedei Chesed signs the Report an email will be sent as a notification.

The screenshot displays a web application interface with four main sections:

- Service Plan:** A table with columns: Effective Date, Program, End Date, Type, Status, and Individual Reviewed. The data row shows: 07/01/2020, SDS-Self-Hired Community Habilitation, (empty), Annual Plan, a green document icon, and (empty).
- Monthly Summary List: Apr 2020 - Sep 2020:** A message stating "There are no monthly summary for this individual." with navigation arrows on the right.
- Broker Agreement:** A message stating "There are no broker agreement for this individual." with navigation arrows on the right.
- Monthly Expenditure Report : Apr 2020 - Sep 2020:** A table with columns: Summary Date, Total, and Status. The data row shows: Total, (empty), \$0.00, and (empty).

# SDS-Summary Cont. Broker Invoices

- Brokerage Billing Summary - Will list all broker billing for each month.
  - We are requiring the broker invoices to be signed by the Participant/Designee in order to be processed.
- Select the Billing Period Date

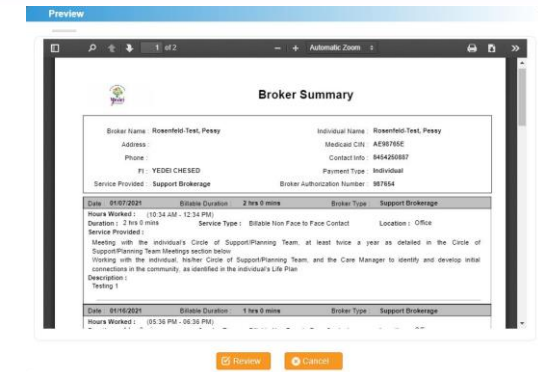
## Brokerage Billing Summary

Billing Period	Broker Name	Actual Duration	Billable Duration	Hourly Rate	Invoice Amount	Payment Status	Summary Status	Individual Reviewed
01/01/2021- 01/31/2021	Rosenfeld-Test Pessy	5 hrs 0 mins	5 hrs 0 mins	\$40.00	\$200.00			
11/01/2020- 11/30/2020	Rosenfeld-Test Pessy	4 hrs 40 mins	4 hrs 30 mins	\$40.00	\$180.00			

- Select Preview
- Select Yes
- Once It has been reviewed a Green checkmark will appear.

## Brokerage Billing Summary

Billing Period	Broker Name	Actual Duration	Billable Duration	Hourly Rate	Invoice Amount	Payment Status	Summary Status	Individual Reviewed
01/01/2021- 01/31/2021	Rosenfeld-Test Pessy	5 hrs 0 mins	5 hrs 0 mins	\$40.00	\$200.00			
11/01/2020- 11/30/2020	Rosenfeld-Test Pessy	4 hrs 40 mins	4 hrs 30 mins	\$40.00	\$180.00			



# SDS - Invoice

- Filters – Can filter to see past invoices
- Select orange + button on top left
- The following information is required:
  - Date of Service
  - Program (IDGS, FRR, OTPS) – Only services that are listed on the budget will show
  - Category
  - Paid To – Vendors will be preassigned.
  - Amount – Matching Invoice/Receipt
  - Description – Basic description of the service
  - Attachments – Required
- OTPS and IDGS Transpiration – Look at the Transportation Slide.
- Select Save to submit

A screenshot of the invoice entry form. The form contains the following fields:

- Date Service Occurred/Will Occur: 10/29/2020
- Program: SDS-Other Than Personal Service Items
- Category: Clothing
- Paid To: TEST VENDOR
- Amount: \$250.00
- Description: Clothing for Pessy
- Attachments: Browse...

On the right side of the form, there is a progress bar with five steps: Submitted, Verified, Check Requested, Approved, and Paid. The 'Submitted' step is checked. Below the progress bar, there is a checkbox for '1099 Required' and a text area for 'Check Memo'. At the bottom right, there are 'Save' and 'Cancel' buttons.

# SDS – Invoice Cont.

- The green Submitted button will appear. – *Edits can still be done at this point. Once Verified no edits are allowed.*
  - The Verified Button will turn green when Yedei Chesed Reviews the Invoice
  - The check Requested button will turn green when the reimburse is sent to billing
  - The Approved and Paid button will turn green once payment has been made.

The screenshot shows an invoice status bar with the following details:

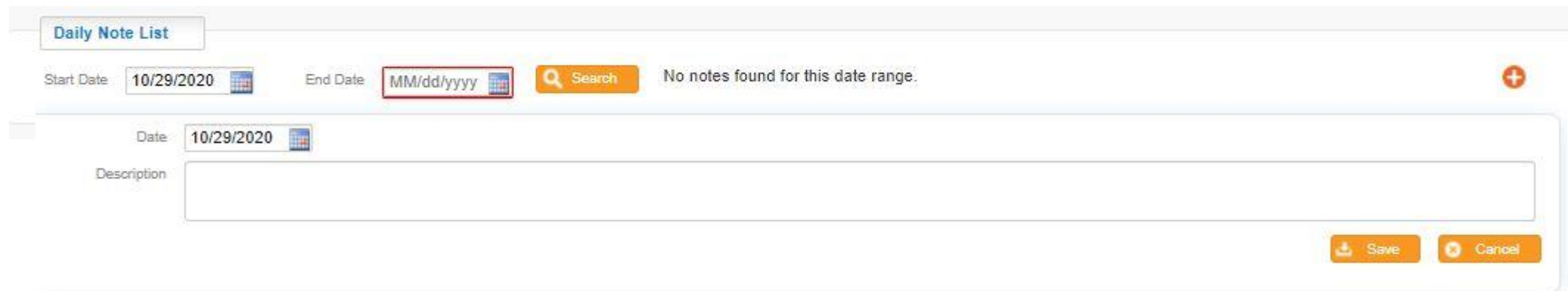
- Date Service Occurred/Will Occur: 10/29/2020
- Program: SDS-Other Than Personal Service Items
- Category: Clothing
- Paid To: TEST VENDOR
- Amount: \$250.00
- Description: Clothing for Pessy
- Attachments: mockinvoice

The status flow consists of five steps: Submitted (green), Verified (grey), Check Requested (grey), Approved (grey), and Paid (grey). A '1099 Required' checkbox is present. A 'View History' link with a pen icon is located at the bottom right of the status bar.

Select the pen icon to go into the invoice to edit

# SDS – Daily Note

- Internal Notes – will not be shared with anyone else, including Yedei Chased
  - Select orange + on the right corner to create a new note



The screenshot displays the 'Daily Note List' interface. At the top, there is a search bar with 'Start Date' set to '10/29/2020' and 'End Date' set to 'MM/dd/yyyy'. A search button is present, and the message 'No notes found for this date range.' is displayed. An orange plus sign icon is visible in the top right corner. Below the search bar, there is a form to create a new note. The 'Date' field is set to '10/29/2020', and the 'Description' field is empty. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.



# SDS – Broker Documentation

- See Budget information
- Service Documentation List
  - Where Brokers write monthly notes for Broker invoices to be generated.

The screenshot displays a web interface for 'Broker Documentation'. It features three main sections: 'Month', 'Budget Details', and 'Service Documentation List'. The 'Month' section shows '10/2020'. The 'Budget Details' section provides a summary of budget and usage statistics. The 'Service Documentation List' section contains a table with columns for Date, Service Type, Location, Duration, and Status, and a 'Total Hours' summary row.

Date	Service Type	Location	Duration	Status
			Total Hours:	0 hrs 0 mins

- At this time, we are requiring the broker invoices to be signed by the Participant/Designee in order to be processed. Please see Page 13 on how to approve Broker Invoices

# SDS – Attendance Roster

- Staff Time Sheets
  - Select Com Hab or Respite and select Refresh

The screenshot shows the top section of the Attendance Roster interface. It includes a 'Program' dropdown menu set to '--Select--', 'From Date' and 'To Date' fields both set to 10/22/2020 and 10/29/2020 respectively, and a 'Filter' dropdown set to 'All'. A yellow 'Refresh' button is located on the right side.

- It will show all Staff time for the dates selected for all staff linked with the Participant.

The screenshot shows the main table of the Attendance Roster. The table has columns for No., Date, Staff Name, Start, Stop, Emp Start, Emp Stop, Duration, Actual Duration, Units, Service Count, Staff Rate, Payment Status, Approve, and Individual Review. A red circle highlights the 'Review' button in the top right corner of the table area.

No.	Date	Staff Name	Start	Stop	Emp Start	Emp Stop	Duration	Actual Duration	Units	Service Count	Staff Rate	Payment Status	Approve	Individual Review
1	10/29/2020	Rosenfeld-Test, Pessy	09:30:04 AM	12:20:38 PM	09:30:AM	12:20:PM	02:45:00	02:50:34	0	0/0	\$25.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Duration – Is the amount the Staff is getting paid for
- Actual Duration – the actual time staff worked
- Service Count – Service Documentation Record
- Orange comment bubble – Any comments regarding the time worked
- Individual Review – Select if approve the time
  - If Individual Review is selected, select orange Review button on top right corner

# SDS - Monthly Summary Note

- At this time we are not requiring the Monthly Notes to be signed by the Participant/Designee in order to be processed. Once we have completed the eVero rollout, that feature may be turned on.

# SDS – Response to Service List

- Daily Documentation Record

**Response To Service List**

All  Show last 12 Months    Program:

Summary Month	Facility Name	Individual Response	Comments	Summary
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
September 2020	Self Direction Site	F (2)	<a href="#">View</a>	<a href="#">View</a>

# SDS – Annual Expense Summary

- Can view the yearly expenditure plan.
  - The reports are currently only accurate from August 2020 and on.
  - Any expenses before then should be listed on the expense report that was sent previously.
- IDGS and OTPS can be expanded to see individual lines within the section.

Annual Expenditure									
Item(s)/Service Description <small>(Items in red are discontinued in the latest amendment)</small>	Original Budget \$s	Accrued Budget \$s	Actual Dollars Spent Per Month	\$s Externally Spent	\$s Reimbursed Amount	\$s Spent Year-to-Date	\$s Remaining/Overspent	% Remaining	
			Sep						
+ SDS-Individual Directed ...	\$15,163.00	\$15,163.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,163.00	100%	
+ SDS-Other Than Persona...	\$3,000.00	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00	100%	
SDS-Family Reimbursed Res...	\$3,000.00	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00	100%	
SDS-Support Brokerage	\$1,200.00	\$1,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,200.00	100%	
SDS-Self-Hired Community H...	\$71,500.00	\$71,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$71,500.00	100%	
SDS-Self-Hired Respite	\$9,750.00	\$9,750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,750.00	100%	
SDS-FSS	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	100%	
Children's After-School Program	\$7,165.60	\$7,165.60	\$0.00	\$0.00	\$0.00	\$0.00	\$7,165.60	100%	
* Fiscal Intermediary	\$7,800.00	\$7,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,800.00	100%	
<b>Totals</b> <small>(These items not included in budget totals)</small>	<b>\$111,778.60</b>	<b>\$111,778.60</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$111,778.60</b>	<b>100%</b>	

# Transportation

 Transportation

- This can be submitted for the Participant/Designee or for the Staff.

Transportation

Category: INDIVIDUAL | From Date: 11/01/2020 | To Date: 11/01/2020 | Items Per Page: 10

Date	Miles	Amount	Toll/Parking Fee	Individuals	Entry Date	Comments
<input type="text"/>				<input type="text"/>		

Document Attached | Add Comments | View Comments | Staff Acknowledged | Parent Reviewed | Approved | Rejected | Previously Rejected | Exported | Invoice Generated | Staffpay Generated

Navigation: [Previous] [Next] [0] / [0]

- Previous trips can be found here as well.
- Select the orange + in the right corner to add a trip.
- All travel entries will be paid at one time per month, not individually.

# Transportation Cont.

- Transportation Date – Date of travel
- Paid To – Vendors will be pre-assigned
- Program – IDGS or OTPS
- Odometer Reading – Not required
- Round Trip – Selecting this will not double the Amount
- Toll/Parking Fee – Participants/Designees can not be reimbursed for Parking. If Toll will be reimbursed with this transpiration an attachment, receipt/invoice will be needed.

**Transportation Entry**

**Transportation**

Transportation Date: 11/01/2020  
Paid To: TEST VENDOR  
Program: OTPS  
Odometer Reading: Start, Stop  
Miles: 291  
Amount: \$168.78  
Toll/Parking Fee:

**Leaves From**

Leaves From: 141 Lafayette Ave  
Start Time: 01 : 27 PM  
Street:   
City: Suffern  
State: NEW YORK  
Zip: 10901

**Goes To**

Goes To: Boston University  
Stop Time: : AM  
Street: 881 Commonwealth Avenue  
City: Boston  
State: MASSACHUSETTS  
Zip: 02215

**Individuals**

		Mileage Rate
<input checked="" type="checkbox"/>	Rosenfeld-Test, Pessy	\$0.58

**Purpose Of Visit**

Visit family

**Attachments**

Browse...

Save Close

- Leaves From – The magnifying icon will show a list of favorites. The Default address will be the participants home address
- To add more address to favorites, add the address in the requested boxes (Do not add Start Time) and select the Green star
- Start Time and Stop Time do not need to be filled out.
- Purpose of Visit – Must be filled out and connecting to a Valued Outcome in the Life Plan.
- Attachment is needed if the Amount is filled out and/or if Toll Parking Fee is filled out.

# Transportation - Staff

- If Staff have put in for transportation the participant/designee will have to sign off on it as well.

Transportation

Category: EMPLOYEE From Date: 11/01/2020 To Date: 11/01/2020 Filter: Review Pending

<input type="checkbox"/>	Date	Miles	Amount	Toll/Parking Fee	Individuals	Entry Date	Comments
<input type="checkbox"/>	11/01/2020	20.2 Auto	\$11.72		Rosenfeld-Test, Pessy	11/01/2020	Community Intergration
<input type="checkbox"/>	11/01/2020	4.2 Auto	\$2.44	\$0.00	Rosenfeld-Test, Pessy	11/01/2020	Money management

Document Attached Add Comments View Comments Staff Acknowledged Parent Reviewed Approved Rejected Previously Rejected Exported Invoice Generated Staffpay Generated

- Change Category to Employee and select the date of travel.
  - It should be Filtered by Review Pending so that all unapproved travel will appear.
- Select the date of travel for the travel information
- Select the orange box if any comments need to be made
- Select the white box next to the date of travel and then select the orange Review box on the top right side to approve the travel



# Staff Activity Fees

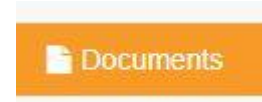


- If staff have requested reimbursement under Staff Activity Fees it will have to get approved by the Participant/Designee.

The screenshot shows a web interface for "Staff Activity Fees". At the top left, there is a date range selector set to "05/15/2020 - 05/31/2020" and a "Filter" dropdown set to "All". To the right, there are "Items Per Page" controls set to "10" and a "Review" button. Below these is a table with the following columns: "Date", "Amount", "Individuals", "Entry Date", and "Description". A single row is visible with the date "05/21/2020", amount "\$25.00", individual "TESTGIRL, CASEY", entry date "05/21/2020", and description "food for service". Below the table is a row of action buttons: "Document Attached", "Add Comments", "View Comments", "Staff Acknowledged", "Parent Reviewed", "Approved", "Rejected", "Previously Rejected", "Exported", and "Invoice Generated". A mouse cursor is pointing at the date "05/21/2020" in the table. At the bottom right, there are pagination controls showing "1 / 1".

- Select the date of service to see the attachment (Which would be the receipt/invoice)
- Select the orange box if any comments need to be made

# Documents

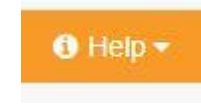


- See all the documents link to the participant.
- ISP Doc (Life Plan) – Required 2 a year
- ISP Doc Review – Life Plans that are not approved yet
- Level of Care (LOC) – Required every year
- Notice of Decision (NOD) – Required to receive Start-Up approval. No follow up required
- Progress Report – Any additional documentation needed, ex. Launch Documents
- SDS – Agreement – Broker Agreements
- SDS – Receipts – Any attachments made with an invoice.
- Service Plan Summary – Staff Action Plan, What the staffs service documentation is based on

The screenshot shows a software interface for document management. On the left, under the "Document Folder" tab, there is a list of folders: Notice of Decision (NOD), Progress Report, SDS - Agreement, SDS - Broker Summary, SDS - Budget, SDS - Expenditure Report, SDS - Monthly Summary Note, SDS - Receipts, SDS - SafeGuard, and SDS - ServiceDocument. The "Service Plan Summary" folder is highlighted in blue. On the right, under the "Document" tab, there is a table with the following data:

Description	Category	Start Date	End Date	Status
<a href="#">Self-Hired Community Staff Action Plan - 07/01/2020 - Annual Plan</a>		07/01/2020		

# Help



- Videos – Link to general videos that the eVero team has recorded.
- User Guide – PDF on how to use the eVero Portal

# Notifications



- Any time the FI signs a document
  - For reimbursements
  - For the monthly expenditure plans
- Any time eVero needs to send a message.

# How to Download the App

- <https://evero.com/evero-mobile-applications/>
- Choose the second option, Self-Direction Family Mobile App.
- Will not work on kindle devices.
- 3<sup>rd</sup> party app – Follow instructions

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**Release Date:**  
August 2020

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[Please click here to read the dA™ Mobile Installation Guide \(PDF\).](#)

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The minimum OS supported for this release is: Android 5.0 Lollipop.

**Newest Update:** digitalAGENCY™ Mobile Version 4.7  
**Release Date:** August 2020

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- Agency Code: YEDEICHESED

# Mobile App

- All features that are available online are available on the App
  - If the log-in is linked to multiple agencies, YEDEICHESED will have to be selected.
  - Only one participant can be worked on at a time. So if multiple Participants are linked to the account one will need to be selected to see the Home page.

# Mobile - Budget Summary

- Will display all Services listed on the budget.
  - Amount Allowed – Amount listed on the budget
  - Amount Spent – Amount already paid since the budget year started
  - Balance – Amount left to spend
  - Pending Pay – Invoices that have been submitted, but not yet reviewed by Yedei Chesed
  - Pending Exp – Invoices have been processed by Yedei Chesed and waiting for payments to be processed
  - Proj. Balance – Amount =  $\text{Balance} - (\text{Pending Pay} + \text{Pending Ex})$

# Miscellaneous

- We can lock any accounts, at any time, as needed.
- If new accounts are needed please let us know.
- If new vendors are needed – the Vendor is the Paid To on an invoice – Please let us know.