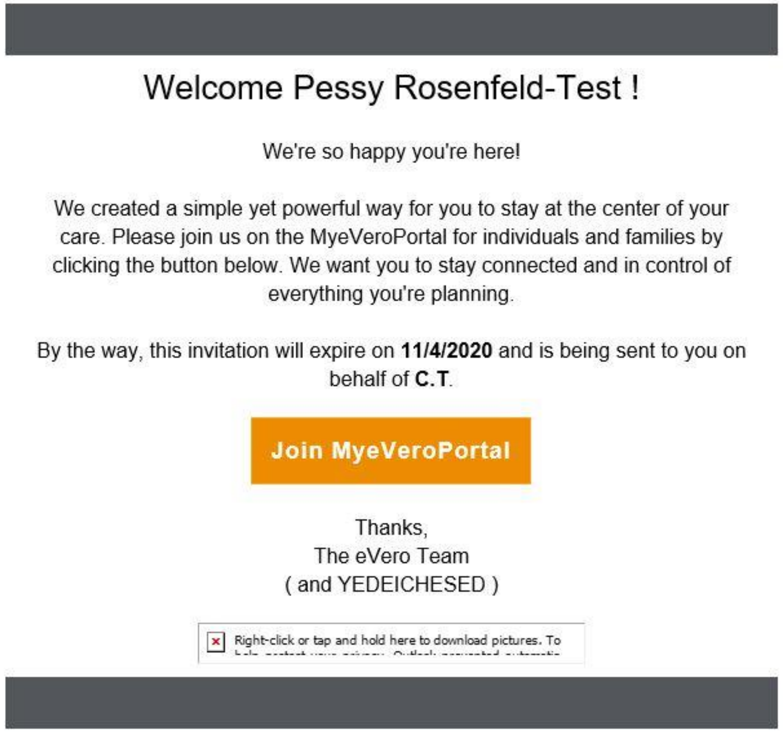
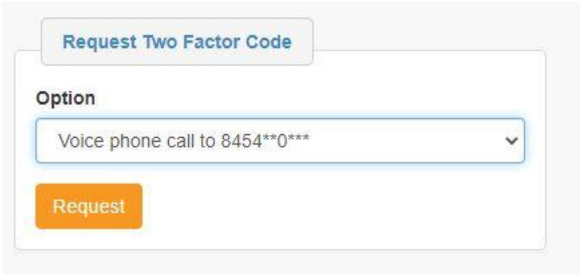
Yedei Chesed eVero Training

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.



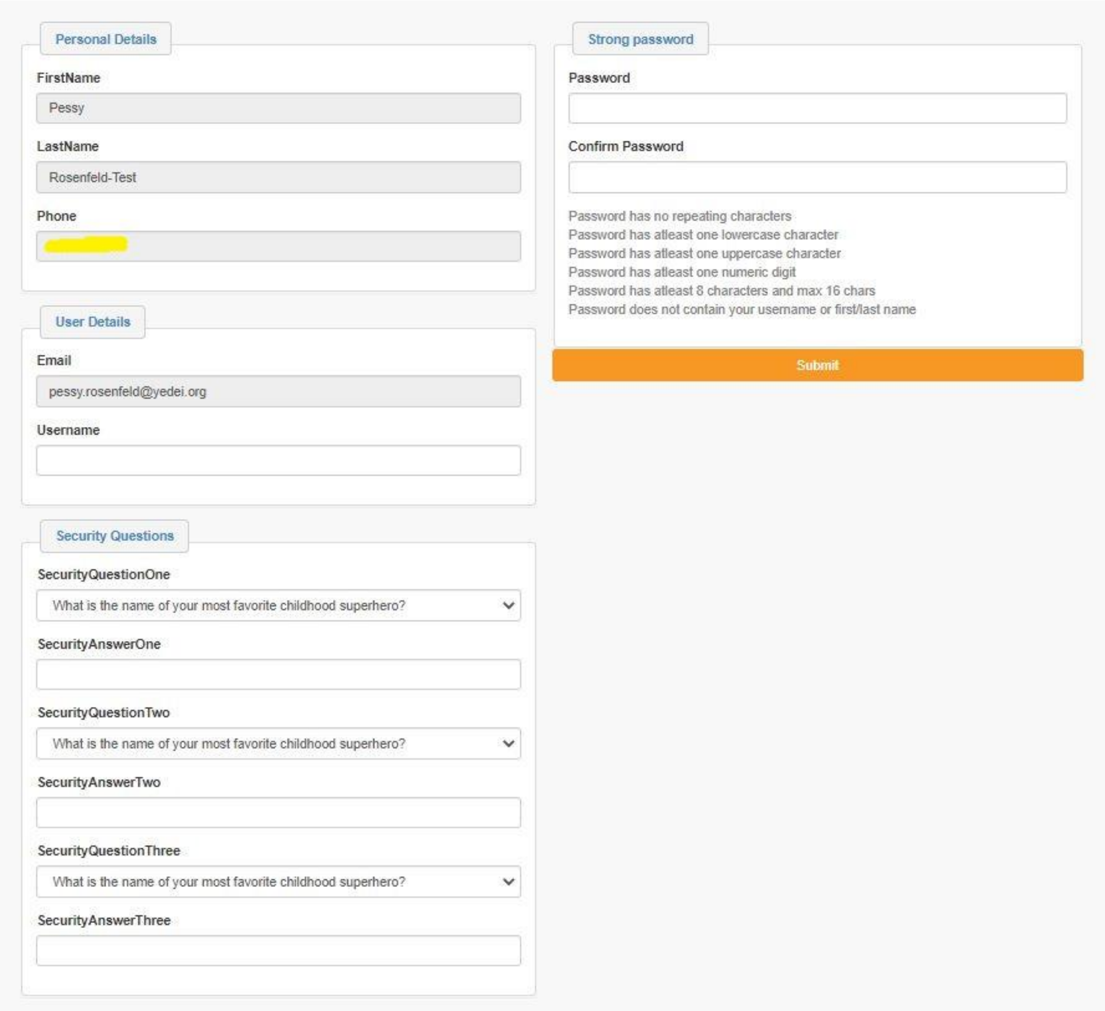


How to Get Started Cont.

- 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

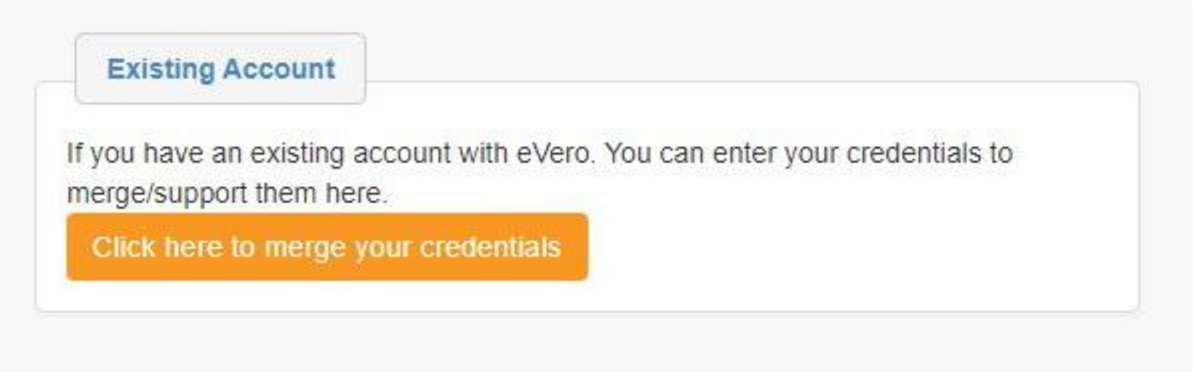
How to Get Started for New Account

- 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



How to Get Started for Multiple Participants

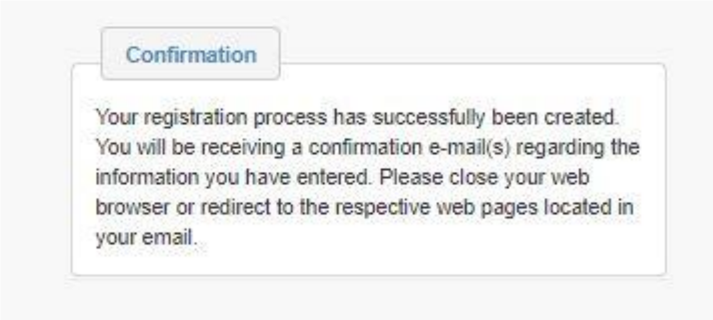
- Instead of having multiple log-Ins, Participant account's can be linked under one Log-In
- Using the link from email regarding the next Participant, select Existing Account to merge Log-In information.

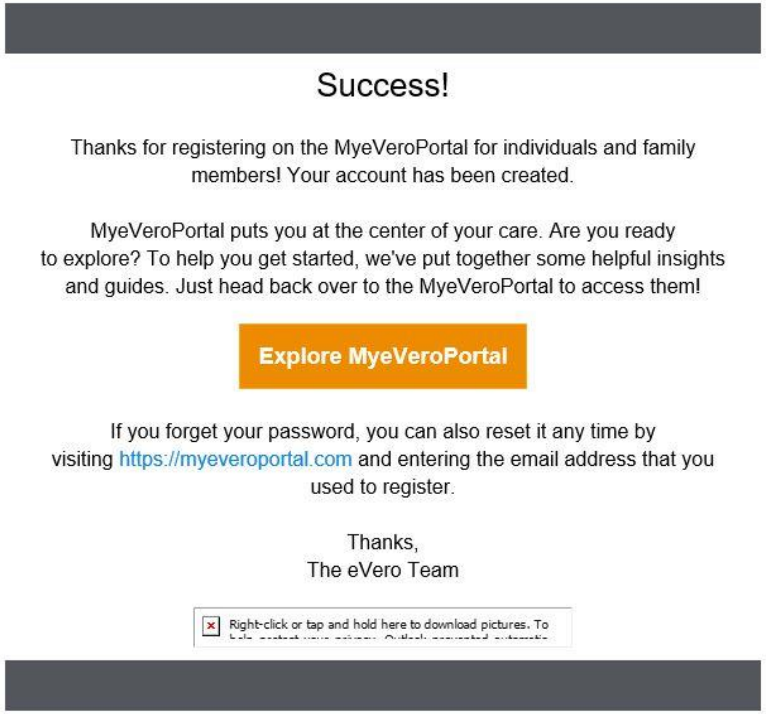


- This can be used for multiple agencies as well.
- Log-In using previous information.

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
- 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.





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..

Individuals

Testgirl, Casey
2/21/1980, 40, Female

Provider	Program	Effective Date
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

Rosenfeld-Test, Pessy
2/21/1990, 30, Female

Provider	Program	Effective Date
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

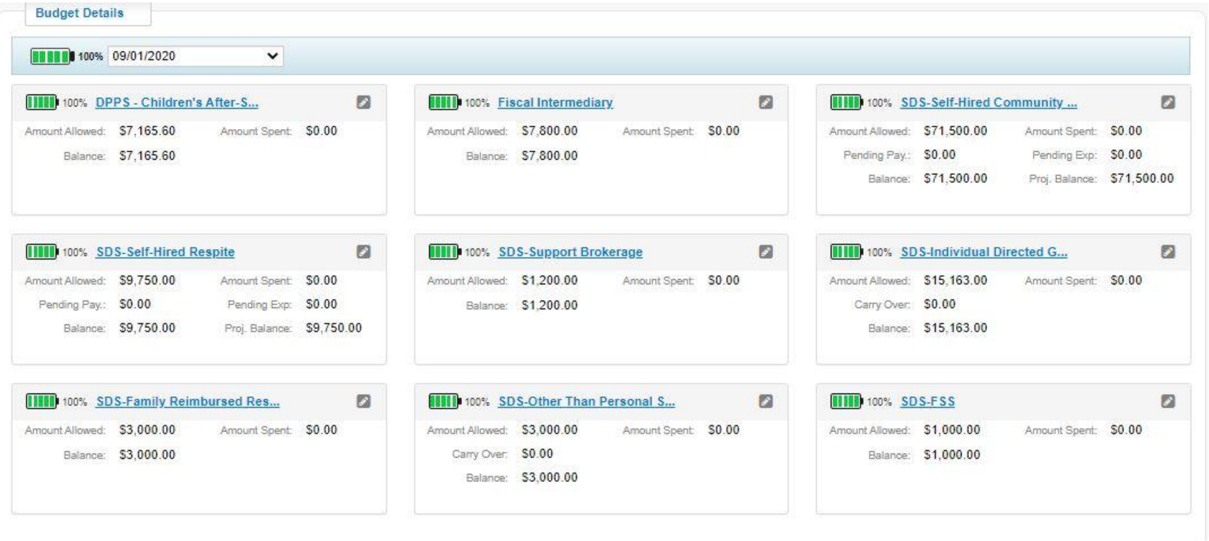
- Selecting the name of one Participant will show the Participants individual Dashboard

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.

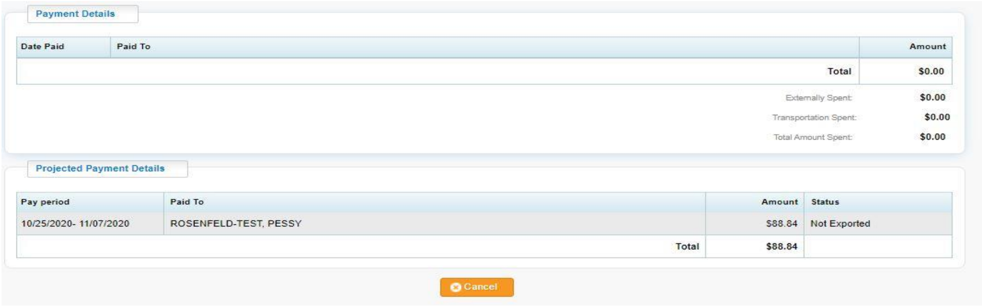
SDS – SDS Summary

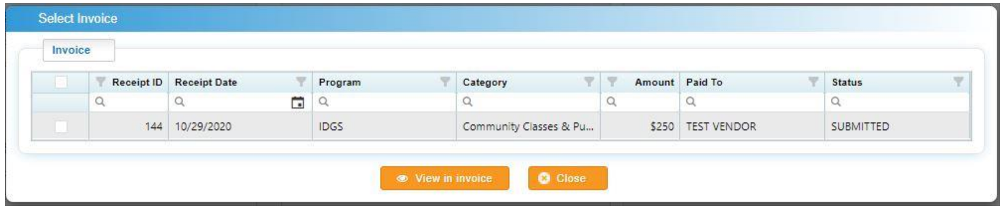
- Will display all Services listed on the budget.
  - Amount Allowed – Amount listed on the budget
  - Amount Spent – Amount already paid since the budget year started
  - Balance – Amount left to spend
  - Pending Pay – Invoices that have been submitted, but not yet reviewed by Yedei Chesed
  - Pending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



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

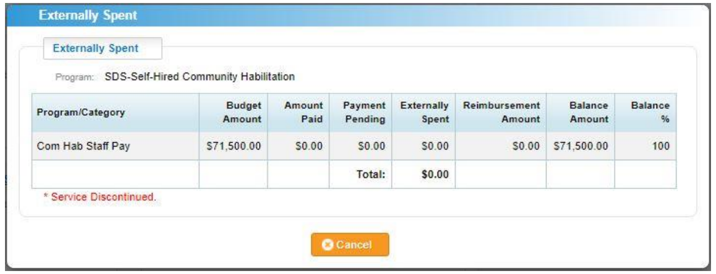




SDS – SDS Summary Cont.

- 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



Externally Spent

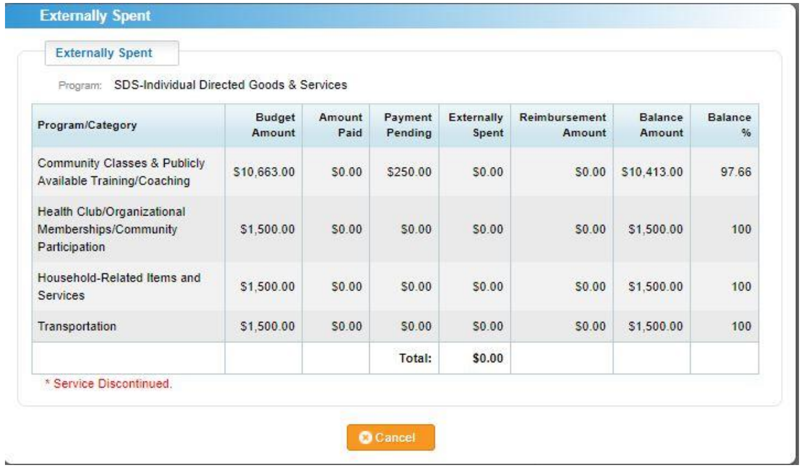
Externally Spent

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

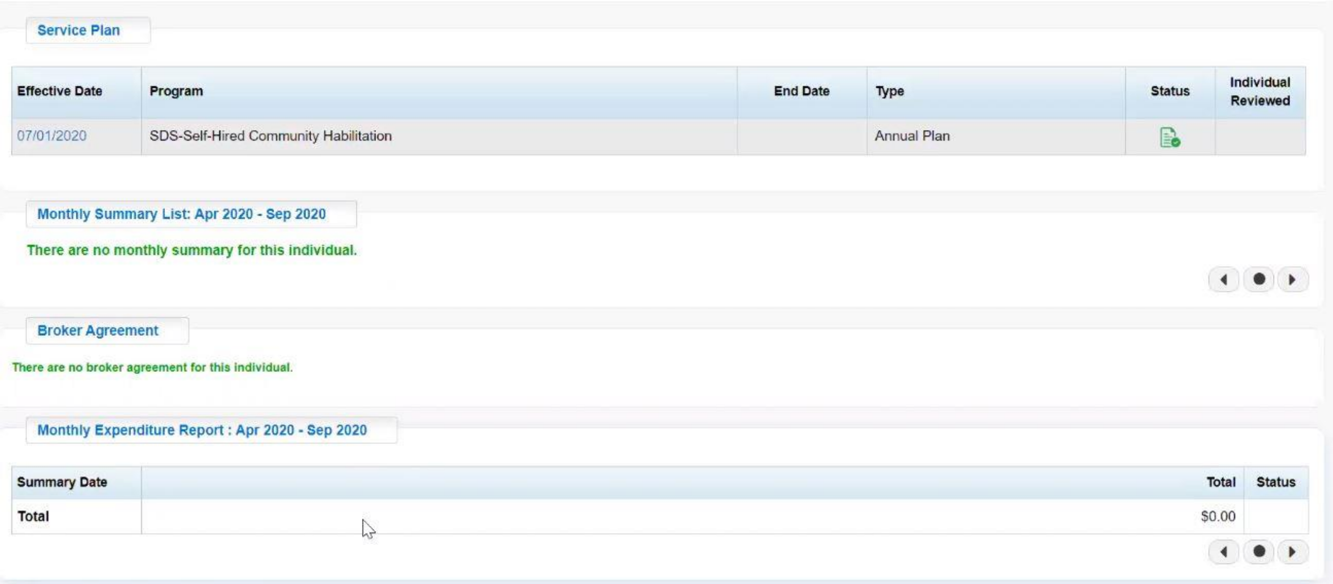
Program/Category	Budget Amount	Amount Paid	Payment Pending	Externally Spent	Reimbursement Amount	Balance Amount	Balance %
Community Classes & Publicly Available Training/Coaching	$10,663.00	$0.00	$250.00	$0.00	$0.00	$10,413.00	97.66
Health Club/Organizational Memberships/Community Participation	$1,500.00	$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.

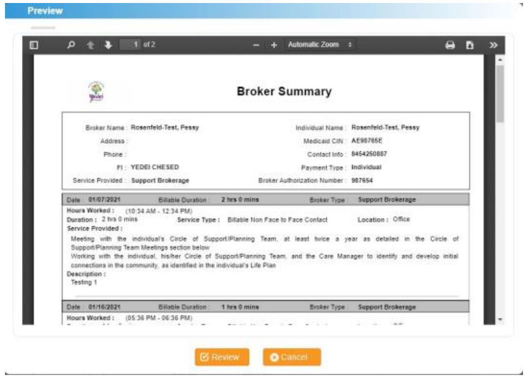


SDS-Summary Cont. Broker Invoices

- 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.

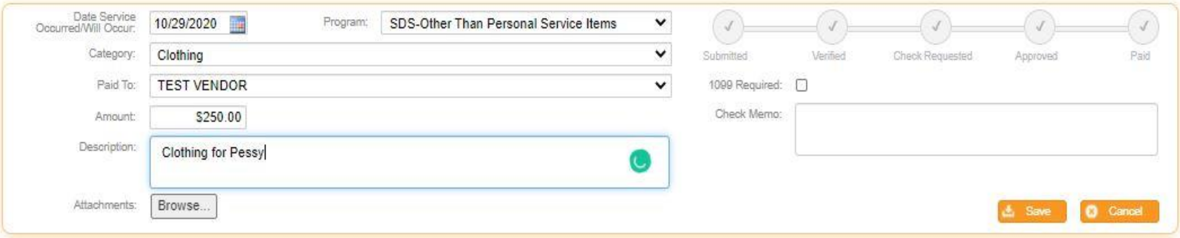
Brokerage Billing Summary

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			

Addendum: 02/08/2021

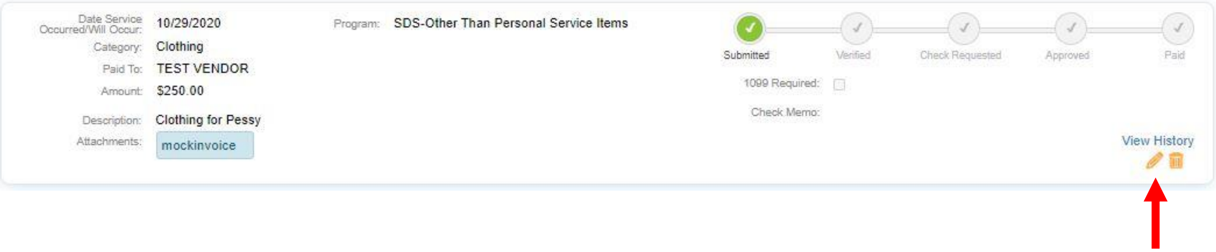
SDS - Invoice

- 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 wil 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



SDS – Invoice Cont.

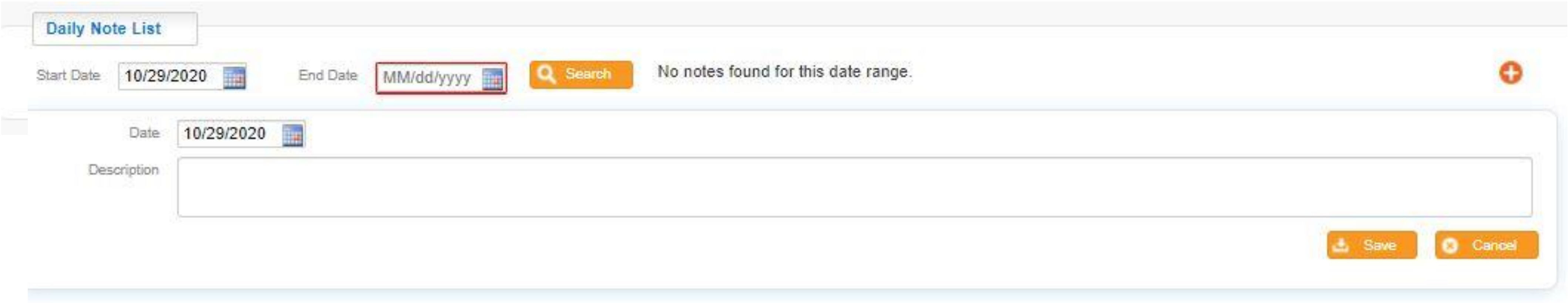
- The green Submitted button will appear. – *Edits can still be done at this point. Once Verified no edits are allowed.*
  - The Verified Button will turn green when Yedei Chesed Reviews the Invoice
  - The check Requested button will turn green when the reimburse is sent to billing
  - The Approved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



Select the pen icon to go into the invoice to edit

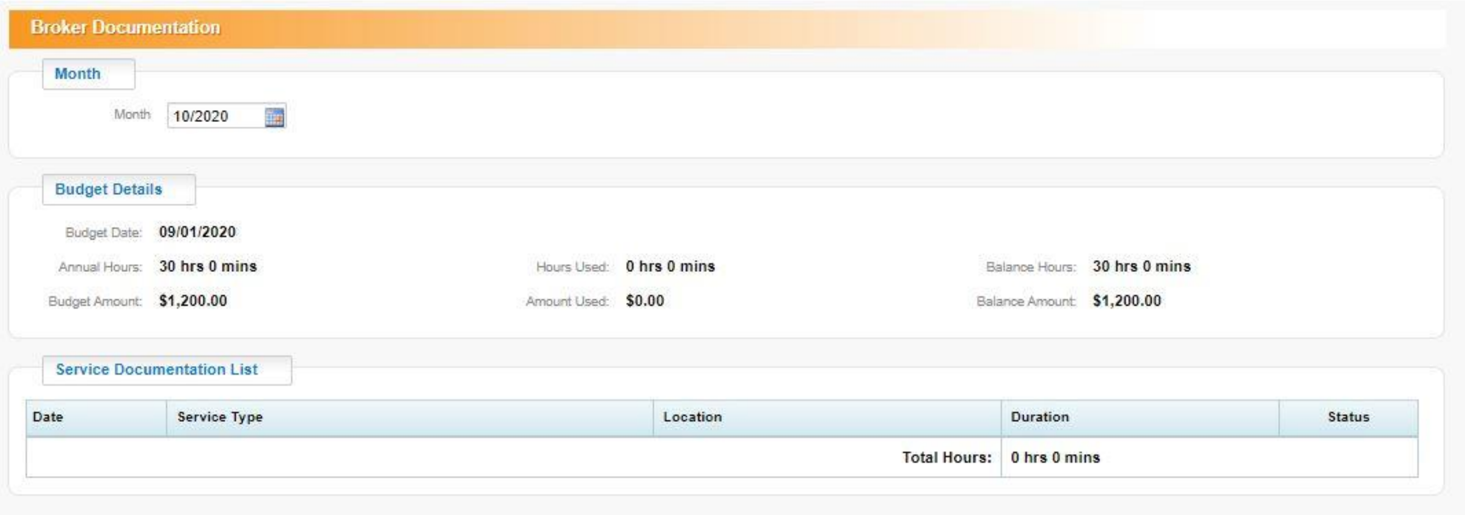
SDS – Daily Note

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



SDS – Broker Documentation

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

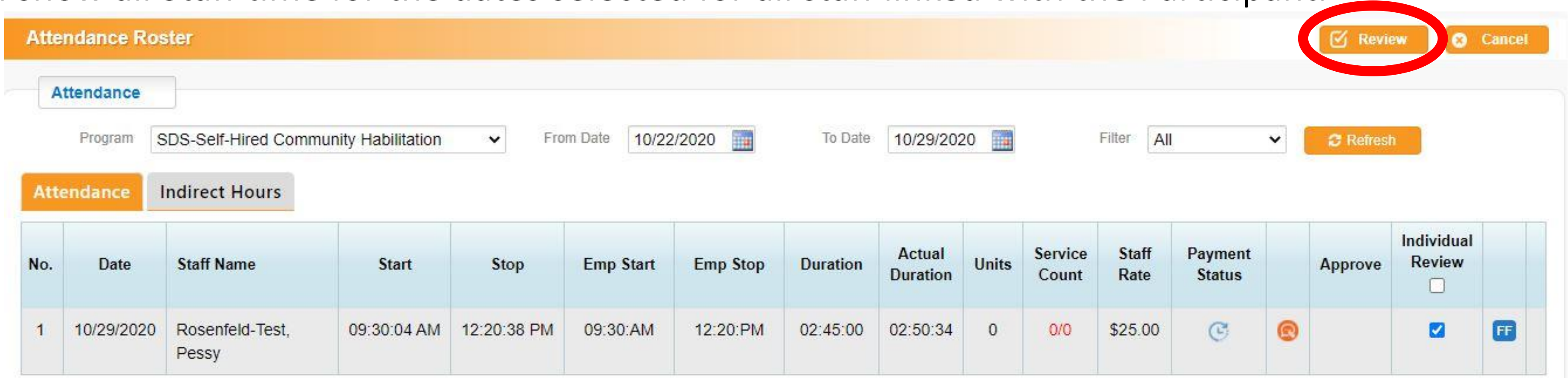


- At this time, we are requiring the broker invoices to be signed by the Participant/Designee in order to be processed. Please see Page 13 on how to approve Broker Invoices

SDS – Attendance Roster

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

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



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					FF

- 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: SDS-Self-Hired Community Habilitation Refresh

Summary Month	Facility Name	Individual Response	Comments	Summary
September 2020	Self Direction Site	F (2)	View	View

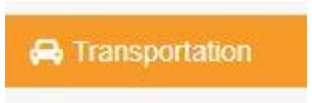
SDS – Annual Expense Summary

- 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.

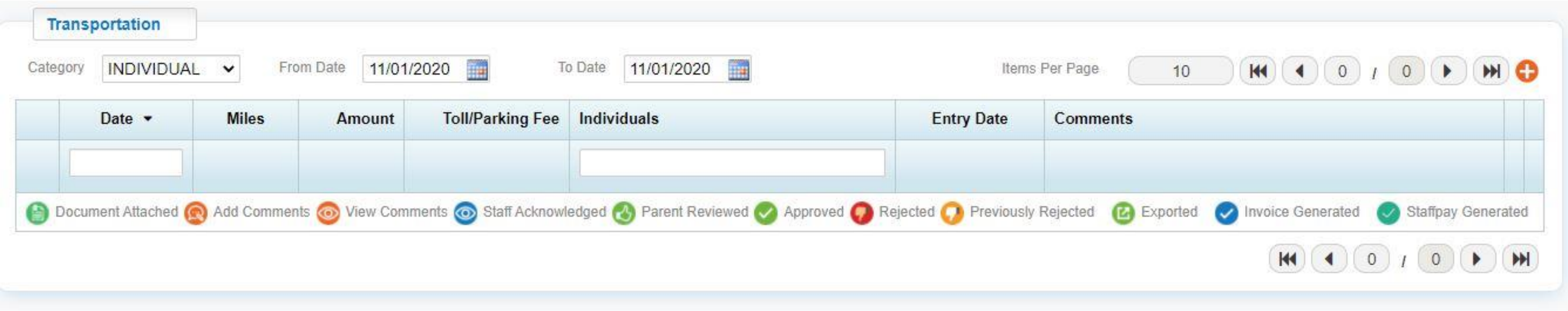
Annual Expenditure

Item(s)/Service Description (Items in red are discontinued in the latest amendment)	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%
Totals (*These items not included in budget totals)	**$111,778.60**	**$111,778.60**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$111,778.60**	**100%**

Transportation



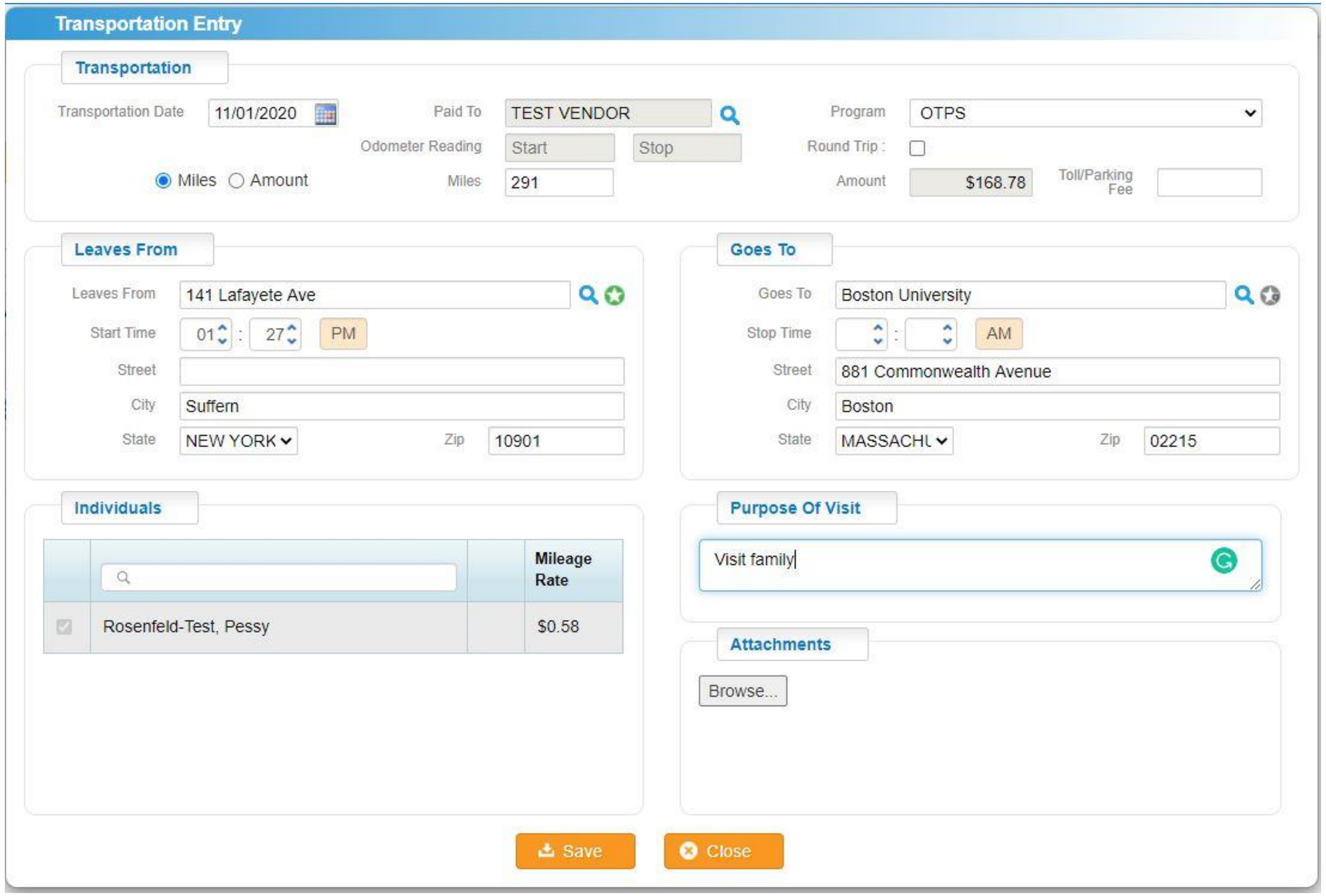
- This can be submitted for the Participant/Designee or for the Staff.



- 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.

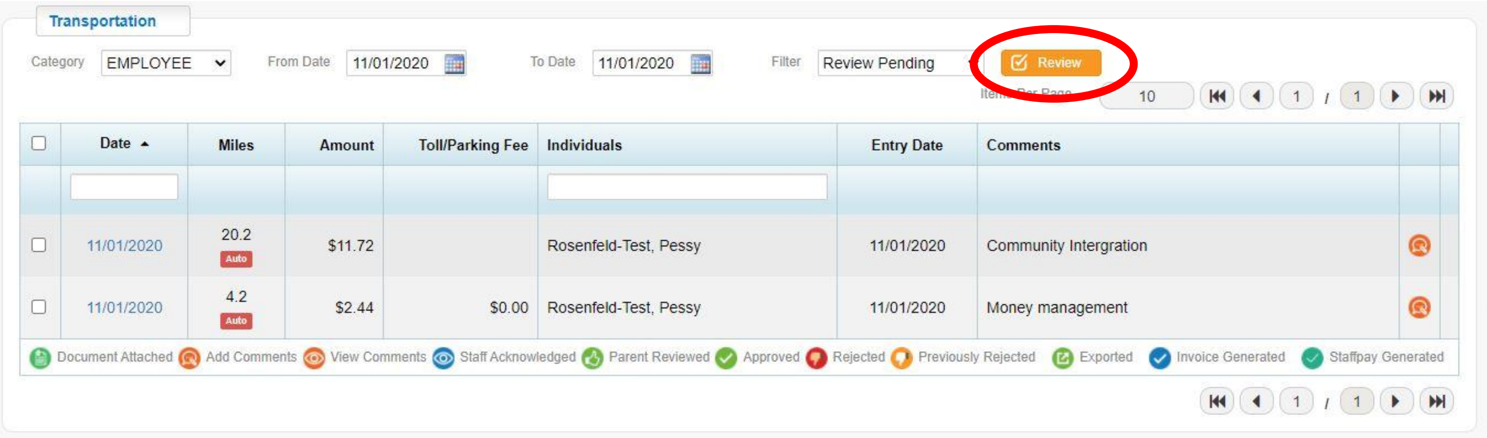
- Transportation Date – Date of travel
- Paid To – Vendors will be pre-assigned
- Program – IDGS or OTPS
- Odometer Reading – Not required
- Round Trip – Selecting this will not double the Amount
- Toll/Parking Fee – Participants/Designees can not be reimbursed for Parking. If Toll will be reimbursed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



- 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.

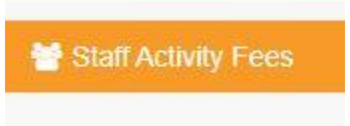
Transportation - Staff

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

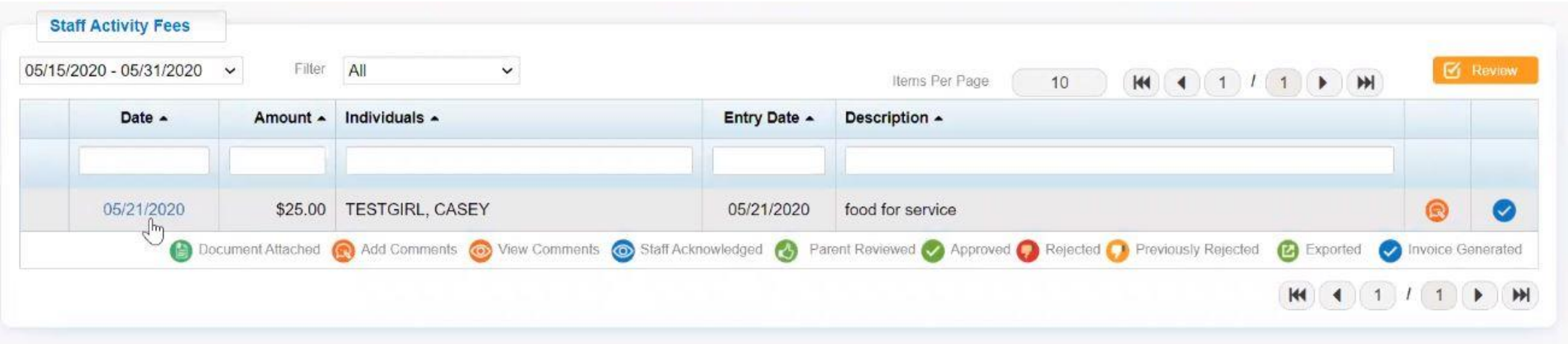


- Change Category to Employee and select the date of travel.
  - It should be Filtered by Review Pending so that all unapproved travel will appear.
- Select the date of travel for the travel information
- Select the orange box if any comments need to be made
- Select the white box next to the date of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

Staff Activity Fees

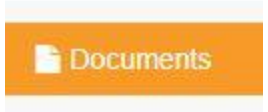


- If staff have requested reimbursement under Staff Activity Fees it will have to get approved by the Participant/Designee.

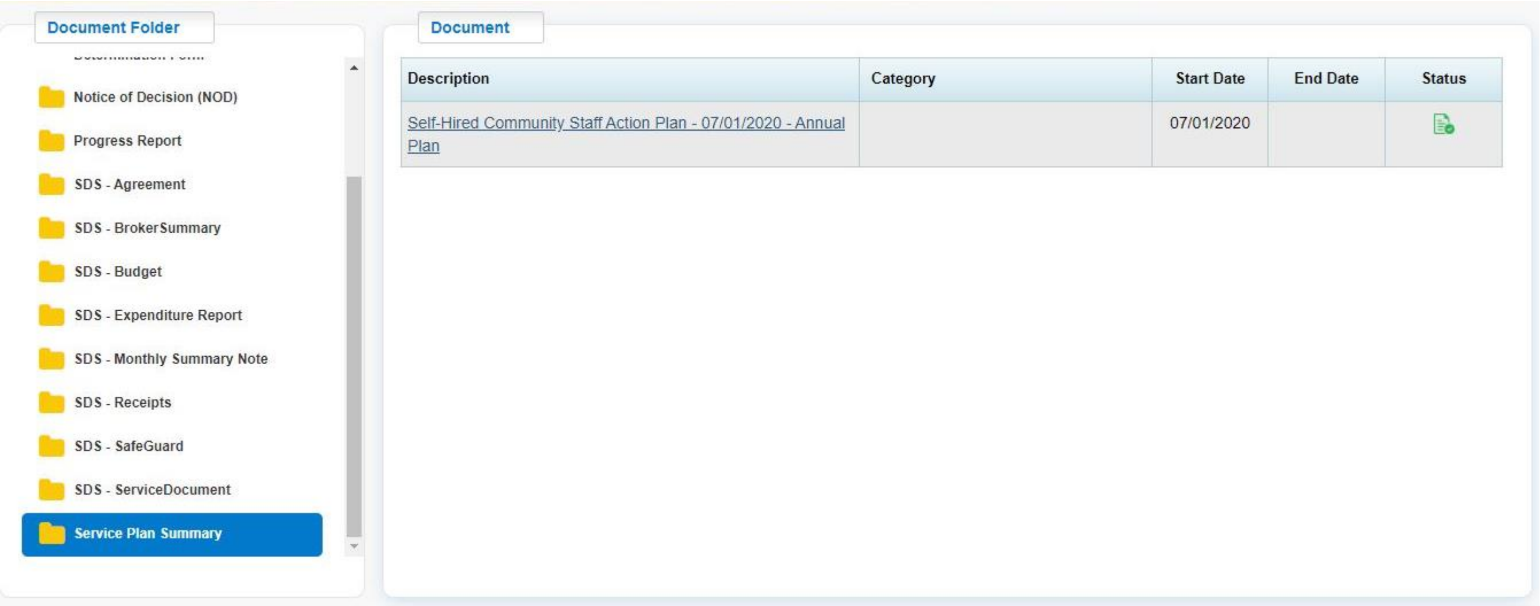


- Select the date of service to see the attachment (Which would be the receipt/invoice)
- Select the orange box if any comments need to be made

Documents

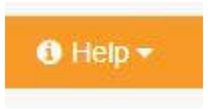


- See all the documents link to the participant.
- ISP Doc (Life Plan) – Required 2 a year
- ISP Doc Review – Life Plans that are not approved yet
- Level of Care (LOC) – Required every year
- Notice of Decision (NOD) – Required to receive Start-Up approval. No follow up required
- Progress Report – Any additional documentation needed, ex. Launch Documents



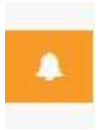
- SDS – Agreement – Broker Agreements
- SDS – Receipts – Any attachments made with an invoice.
- Service Plan Summary – Staff Action Plan, What the staffs service documentation is based on

Help



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

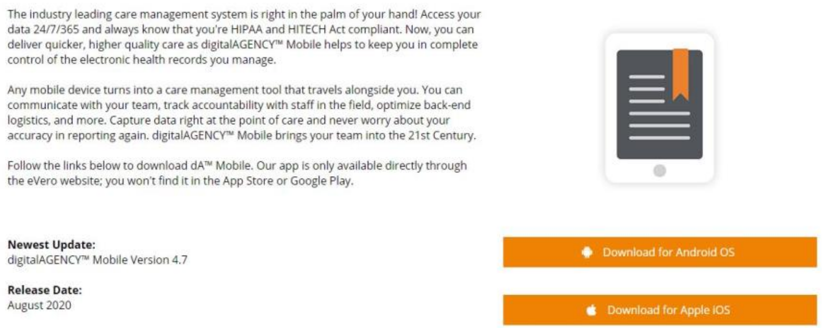
Notifications



- 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.
- 3rd party app – Follow instructions



- 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 =Balance-(Pending Pay+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.