

eVeroPortal App user can review 'Dashboard' screen for Invoice Status (<u>Rejections</u> <u>or Paid</u> section) upon login:

Dashboard	Close
AVERAGE, JOE	
Budget Summary Total Budget Amount \$133810.00 Spent Year to Date \$0.00 Remaining Balance: \$133810.00	00 % >
B Rejections	
Transportation	• >
Individual Summary Note	0 >
Invoice	1>
Review Pending	
Paid	
Transportation	0 >
Invoice	0 >



Review a Rejected Invoice:

- 1. Under Invoice select 'View'
- 2. Select 'Filter' to open 'Invoice-Filter Menu'
- 3. To filter for rejection, select 'Rejected' under 'Status' category
- 4. Select 'Apply Filter' (purple button bottom righthand side of menu screen) to apply to all invoices

K Back	_	
AVERAGE, JOE	Back	
28 Years, Male		INVOICE-FILTER Cancel
INVOICE Add View		SEARCH
Month/Vear Sort by	INVOICE	Paid to
May/2023	IF	O Paid to
	★• Month/Year	Check Number
05-31-2023	Way/2023	Check Number
Dresserer	05-31-2023	TEMPLATES
Category : Transportation		O Submitted Today
Vendor : Jones, Joseph-Test	Category	O Verified Today
Description : may 2023 mileage to music classes	> Vendor	
Amount :\$3.34	Description	SIAIUS
	Amount	O Submitted
Submitted Verified Check Approved F	Paid	O Verified
05-25-2023	Submitted	Check Requested
	05-25-2023	O Approved
Program : SDS-Family Reimbursed Respite		O Paid
Vendor : Jones Joseph-Test	Program	Rejected
Description : FRR	> Vendor	
Amount : \$80.00	Description	O Partially Verified
	Amount	O Voided
Submitted Verified Check Approved F	Paid	
Sue Test	Submitted	Reset Apply Filter

Additional Resources: AIM Rejection Resource- eVeroPortal; AIM Reimbursement Process; AIM Life Cycle of an Invoice



- 5. Select the Month (calendar icon) to toggle between invoices submitted
- 6. To read reason for rejection select the dropdown menu (purple icon righthand side of screen)
- 7. 'Rejection Reason' will be located under 'Status History'

Please Note:

• The reason for rejection will appear in the description; rejection notification sent from eVero to communicate rejection and team communications are provided to indicate information needed

K Back				
AV 28	ERAGE, JOE		AVE 28 Y	ERAGE, JOE rears, Male
INVOICE	Add View Filter		STATUS HI	STORY
Month/Year	Sort by		Date Time	: 12-14-2023 06:02:04 PM
Dec/2023			Username	: Test, Sue
12-31-2023			Status	: Submitted
Program	: SDS-Family Reimbursed Respite		Date Time	: 12-18-2023 09:06:00 AM
Category	: Reimbursable Items		Username	: Jablonski, Jessica
Vendor	: Jones, Joseph-Test		Status	: Rejected
Description Amount	: REVIEW: This is in review due to overlap of sta	` <	Reject Reason	you are already working with your AIM support tea
Submitted	Check Approved Paid			

Resubmit a Rejected Invoice:

- 1. Select the invoice in need of editing (purple arrow righthand side of screen)
- 2. User will be prompted to agree to make changes which will update the status of the invoice; User will select 'Yes' to continue

12-31-2023				
Program	: SDS-Family : Reimbursat	v Reimbursed R	espite	
Vendor	: Jones, Jose	eph-Test		\bigcirc
Description	: REVIEW: Th	nis is in review c	due to overlap o	f sta
Amount	: \$240.00			
		Check		
Submitted	Rejected	Requested	Approved	Paid

Additional Resources:

AIM Rejection Resource- eVeroPortal; AIM Reimbursement Process; AIM Life Cycle of an Invoice



3. Invoice can be <u>edited</u> as needed (select 'Save' when edits are complete; invoice will update status as 'Submitted')

INVOICE A 31 Dec 2023 Paid to* (i) Jones, Josept Amount [<2574	Add View trogram* SDS-Family P Category* Reimbursable	Reimbursed Re	espite	>
F 31 Dec 2023 Paid to* (i) Jones, Joseph Amount [<2574	Program* SDS-Family F Sategory* Reimbursable	Reimbursed Ro	espite	>
31 Dec 2023 Paid to* (i) Jones, Joseph Amount [<2574	SDS-Family F ategory* Reimbursable	Reimbursed Re	espite	>
Dec 2023 Paid to* (i) Jones, Joseph Amount [<2574	Category* Reimbursable n-Test	e Items		>
Dec 2023 Paid to* (i) Jones, Joseph Amount [<2574	Reimbursable 1-Test	e Items		>
Paid to* (i) Jones, Joseph Amount [<2574	-Test			
Jones, Joseph Amount [<2574	-Test			
Amount [<2574				
A 040.00	.00]*		1099 Required	
\$ 240.00		Add Service		
Associated Ver	idor 🚺			
0				•••
Check Memo				
Description*	2 1 2 1 2 1	8 957	at age 1990 too	
REVIEW: This hours confirm questions -BK	is in review d ed by payee.	ue to overlap Please reach	of staff on shift. W out to the SD Tear	ill need n with any

Please Note:

- Rejection of a reimbursement request may not mean the request cannot be paid
- Two Types of Rejections:
 - $\circ \ \ \text{Corrections needed}$
 - Not reimbursable due to programmatic standards
- Needed corrections will be identified through team communications



- Once rejected invoice corrections are made communications will be provided to AIM team for review and processing
- Audit trails in eVero capture submission/ correction dates for every invoice request



eVeroPortal Website user can review 'Dashboard' upon login for a quick look at 'Status Summary' for invoices or transportation (<u>Rejections / Approved/ Paid</u> section) <u>or</u> select 'SDS' dropdown for "Invoice' page:

myCarePortal[™]Powered by eVero



Review a Rejected Invoice:

- 1. Under 'Invoice' page user can filter entries to 'Rejected' under 'Status'
- 2. Once filters are applied select 'Retrieve' (orange button on righthand side of page)

myCarePortal[™] Powered by eVero

a	Dashboard	希 SDS 👻 🖨 Transp	ortation Sta	ff Activity Fees	¢ evv	Documents	€ Help ▼					• •	٠	S JOE
Inv	oice Bu	dget Date : 04/01/2023										Export	Data	
	Templates: Status:	Custom Rejected All Submitted Verified	Filter: Program:	All Select		~	Date Range 💽 Category:	03/01/2023	. • 06/30/2023	▼ S	earch:	Q Retrieve Paid To]	~
	r voice List Sort by	Check Requested Approved Paid Rejected Partially Verified Voided	~					~			H		1	

Additional Resources:

AIM Rejection Resource- eVeroPortal; AIM Reimbursement Process; AIM Life Cycle of an Invoice

R. Jan-24



 Rejected invoice will populate indicating 'Rejected Status' (red X icon labeled 'Rejected')

Date Service Occurred/Will Occur: Category: Paid to:	12/31/2023 Prog Reimbursable Items Jones, Joseph-Test	gram: SDS-Family Reimbursed Respite		Submitted	Rejected	Check Requested	Approved	Paid
Reimburse to: Amount: Description	\$240.00 View Services REVIEW: This is in review due to overlap of staff	.View more	1099 Required:			Invoice No.:		
Attachments #463418						R	elated Invoices	View History

4. To review reason for rejection hover over the 'Rejected Status' icon; further details can be found in the description box of the invoice



Resubmit a Rejected Invoice:

1. Select the orange pencil to open the invoice for editing (bottom righthand side of invoice submission status)



AIM Rejection Resource- eVeroPortal; AIM Reimbursement Process; AIM Life Cycle of an Invoice R. Jan-24



- 2. User is notified that editing the selected invoice will update invoice status to 'Submitted'
- 3. User will select 'Yes' to agree to changing the invoice status to submitted in order to continue with editing



4. Invoice will open and can be <u>edited</u> as needed (select 'Save' once edits are complete; invoice status will update as 'Submitted')

Date Service Occurred/Will Occur:	12/31/2023	~		((v)		
Category:	Reimbursable Items	~		Submitted	Rejected	Check Requested	Approved	Paid
Paid to:	Jones, Joseph-Test	~ Q						
Reimburse to:			1099 Required:			Invoice No.:		
Amount:	\$240.00 Add Services		Check Memo:					
Description:	REVIEW: This is in review due to overlap of staff on shift. Will need hours confirmed by payee. Please reach out to the SE Team with any questions -BK						Save 👂 🤇	Cancel
Attachments:	Drop files here or Click to upload							
				Budget shift setting	Later of (Receipt I	Date, Payment Date) B	ludget effective date: (04/01/2023

Please Note:

- Rejection of a reimbursement request may not mean the request cannot be paid
- Two Types of Rejections:
 - o Corrections needed
 - Not reimbursable due to programmatic standards
- Needed corrections will be identified through the team communications



- Once rejected invoice corrections are made communications will be provided to AIM team for review and processing
- Audit trails in eVero capture submission/ correction dates for every invoice request