

# Individual Directed Goods & Services (IDGS) Reimbursement Steps

## eVeroPortal App and Website

### eVero Program Categories

(available in approved SD Budget)

IDGS Categories with similar entry steps include the following:

|  |  |                                 |
|--|--|---------------------------------|
| Camp                                       | Community Classes                      | Coaching/Education              |
| Clinical Consultants (Clinical Non-Direct) | Clinical Consultants (Clinical Direct) |                                 |
| Health Club/Organizational Memberships     | Household related items/services       |                                 |
| Interpretation Services                    | Paid Neighbor                          | Self-Direction Staffing Support |
| Transition Programs                        |  |                                 |

#### Additional AIM Supports:

**Recurring Payments-** memberships invoiced yearly will be processed and paid out on a monthly cycle; if desired AIM can set up recurring payments which will assist in automatic monthly invoices to populate for reimbursement (total cost of invoice divided by 12)

**Direct Pay-** AIM offers a direct payment option with all direct pay cleared vendors. This allows AIM to directly pay the provider and for the person receiving supports to avoid initial out of pocket expenses.

**Preapproval Team-** AIM offers an additional support of programmatic item review which can assist teams with a pre-approval or denial of the requested opportunity. Requests can be submitted through your SD Coordinator or [preapproval@aimservicesinc.org](mailto:preapproval@aimservicesinc.org)

**AIM Approved Activities-** AIM maintains a Self-Direction approved list of activities across NYS; available per request from SD Team

\* **eVeroPortal-** utilized by individuals or representatives to submit reimbursement requests  
Reimbursement Requests can be submitted on the mobile app or website

**Note:** this document is designed to show individuals, families, and advocates how to upload invoices for reimbursement

## eVeroPortal App

1. Log into eVeroPortal  
\*Username and Password selected by user
2. Select 'Sign In'



Sign in to continue

Username [Forgot your username?](#)

Password [Forgot your password?](#)

[Sign In](#)

[Forgot your login information?](#)

### Forgotten User/Password:

Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

3. eVeroPortal App user can review 'Dashboard' screen for Invoice Status ([Rejections](#) or [Paid](#) section) upon login:

Dashboard
Close

AVERAGE, JOE

Budget Summary

Total Budget Amount  
**\$133810.00**  
Spent Year to Date  
**\$0.00**  
Remaining Balance: **\$133810.00**

100 %

Rejections

|                         |   |   |
|-------------------------|---|---|
| Transportation          | 0 | > |
| Individual Summary Note | 0 | > |
| Invoice                 | 1 | > |

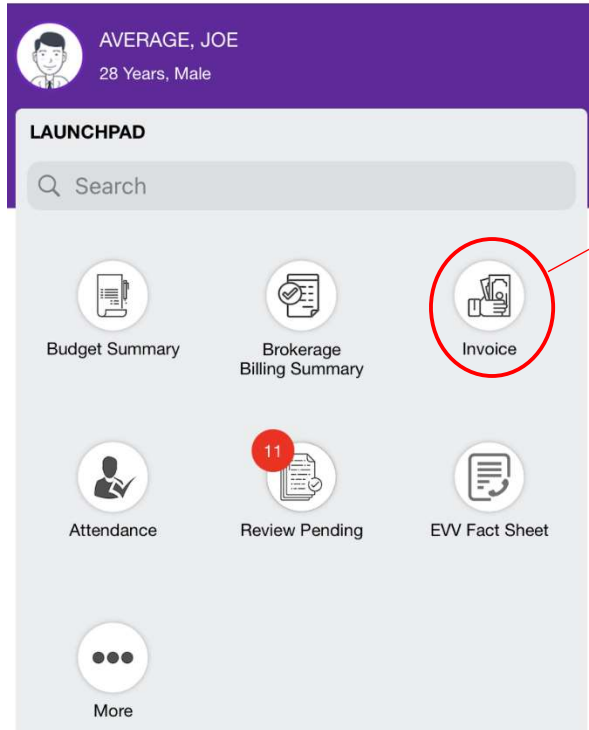
Review Pending

Paid

|                |   |   |
|----------------|---|---|
| Transportation | 0 | > |
| Invoice        | 0 | > |

4. Select 'Invoice' icon on the Menu Launchpad
5. Select 'Add' to enter reimbursement request

Menu



AVERAGE, JOE  
28 Years, Male

LAUNCHPAD

Search

Budget Summary Brokerage Billing Summary **Invoice** Attendance Review Pending EVV Fact Sheet

More

Save

Back

AVERAGE, JOE  
28 Years, Male

**INVOICE** Add View

Program\*  
01 Select

Aug 2023 Category\*  
Select

Paid to\* i Select

Amount\* 1099 Required  
\$

6. Enter the following information for IDGS invoice submission
  - o Date of Service
  - o Program: Individual Directed Goods and Services (IDGS)
  - o Category
  - o Paid To: (person requesting reimbursement)
  - o Amount
  - o Description
  - o Attachments: itemized invoice and proof of payment (please note that all IDGS categories may vary in programmatic criteria)

Invoice Submission Notes:

- Only Self-Direction **categories in the current budget** will show
- **'Paid To'** field identifies who will receive payment if this invoice is approved; in the event a direct payment is being requested the vendor associated will be used in this field
- **'Amount'** should not exceed the amount of the **invoice**; amount will be verified against the remaining funds in the budget
- **'Description'** field describes the invoice that is being submitted and communicates to support team/bookkeeping
- **'Attachments'** field provides the user with the ability to add supporting documentation for the invoice submission

Save

Back

AVERAGE, JOE  
28 Years, Male

**INVOICE** Add View

Program\*  
01 SDS-Individual Directed Goods & Services

Aug 2023 Category\*  
Health Club/Organization.../Community Participation

Membership End Date

Paid to\* i Jones, Joseph-Test

Amount\* [ \$500.00 ] 1099 Required  
\$ 25

Associated Vendor i  
Type or Select Associated Vendor.

Check Memo

Description\*  
Monthly Planet Fitness Membership

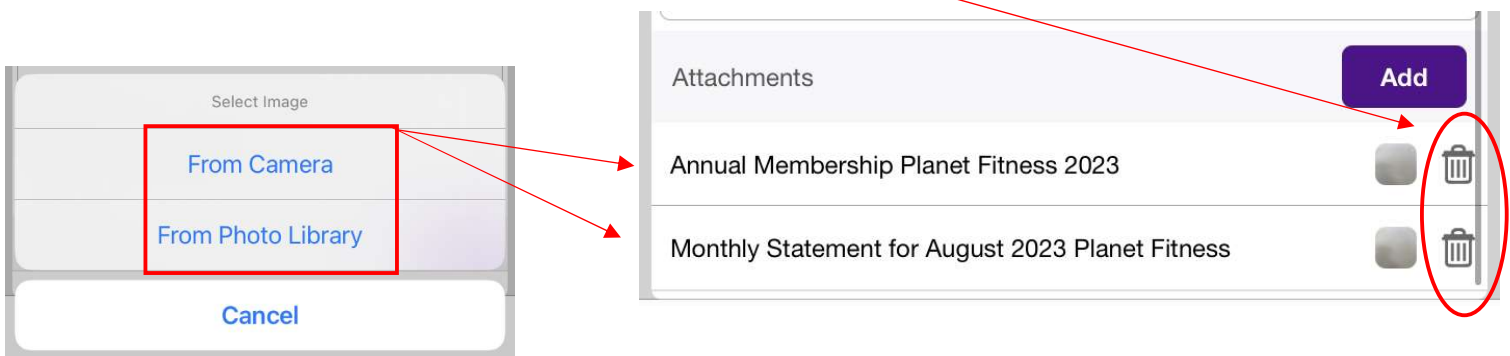
Attachments Add

Please Note:

Attachments must be entered by selecting 'Add' using one of two options:

- 'From Camera'
- 'From Photo Library'

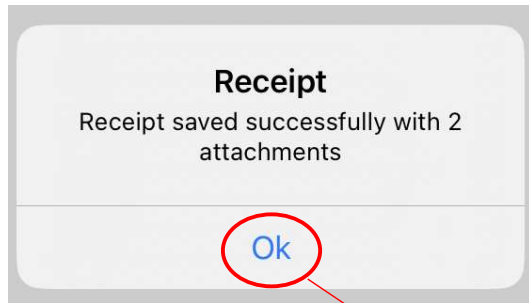
(to delete attachment, select the 'trashcan' icon)





7. Once all fields are entered select the purple 'Save' button (top right-hand corner of screen)

**\*Membership end date not required\***

8. Saved invoices will populate as 'Submitted'



A screenshot of a mobile app interface for a user named "AVERAGE, JOE" (28 Years, Male). The screen shows a list of invoices under the heading "INVOICE". The first invoice is dated "08-03-2023" with an amount of "\$50.00" and a status of "Submitted". The second invoice is dated "08-01-2023" with an amount of "\$3.28" and a status of "Submitted". The third invoice, also dated "08-01-2023", has an amount of "\$25.00" and a status of "Submitted". This third invoice is highlighted with a red border. Each invoice has a progress bar with five steps: Submitted, Verified, Check Requested, Approved, and Paid. The "Submitted" step is highlighted with a purple checkmark. A purple dropdown icon is visible next to the third invoice, and a purple arrow icon is visible next to the second invoice.

- To delete: select **purple dropdown icon** on specific invoice; select 'Delete Invoice' to permanently delete 
- To edit: select **purple arrow** on specific invoice 

A detailed view of an invoice dated "08-01-2023". The invoice details are: Program: SDS-Individual Directed Goods & Services, Category: Health Club/Organizational Memberships/Com..., Vendor: Jones, Joseph-Test, Description: Monthly Planet Fitness Membership, Amount: \$25.00. The status is "Submitted". A purple dropdown icon and a purple arrow icon are circled in red. A red arrow points from the purple dropdown icon to the "Delete Invoice" option in the adjacent dialog box.

A dialog box for deleting an invoice. It has a light gray background. At the top, it says "Select". Below that, there are two options: "View History" and "Delete Invoice". The "Delete Invoice" option is highlighted with a red arrow. At the bottom, there is a blue "Cancel" button.

# Individual Directed Goods & Services (IDGS) Reimbursement Steps

## eVeroPortal Website

1. Log into eVeroPortal at [signin.evero.com](https://signin.evero.com)  
\*Username and Password selected by user
2. Select 'Sign In'



Sign in to continue

Username [Forgot your username?](#)

Password [Forgot your password?](#)

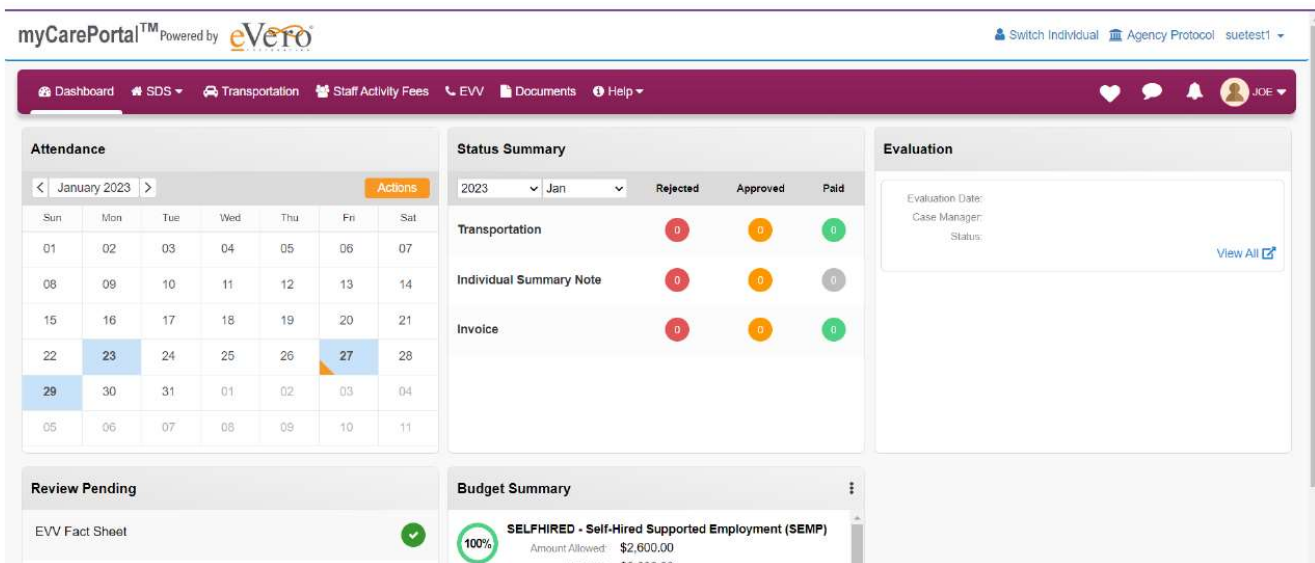
[Sign In](#)

[Forgot your login information?](#)

### Forgotten User/Password:

Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

3. Once signed in, the user will be shown the account summary page



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Switch Individual Agency Protocol suetest1

Dashboard SDS Transportation Staff Activity Fees EVV Documents Help

**Attendance**

< January 2023 > Actions

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 01  | 02  | 03  | 04  | 05  | 06  | 07  |
| 08  | 09  | 10  | 11  | 12  | 13  | 14  |
| 15  | 16  | 17  | 18  | 19  | 20  | 21  |
| 22  | 23  | 24  | 25  | 26  | 27  | 28  |
| 29  | 30  | 31  | 01  | 02  | 03  | 04  |
| 05  | 06  | 07  | 08  | 09  | 10  | 11  |

**Status Summary**

2023 Jan Rejected Approved Paid

|                         | Rejected | Approved | Paid |
|-------------------------|----------|----------|------|
| Transportation          | 0        | 0        | 0    |
| Individual Summary Note | 0        | 0        | 0    |
| Invoice                 | 0        | 0        | 0    |

**Evaluation**

Evaluation Date:  
Case Manager:  
Status:  
[View All](#)

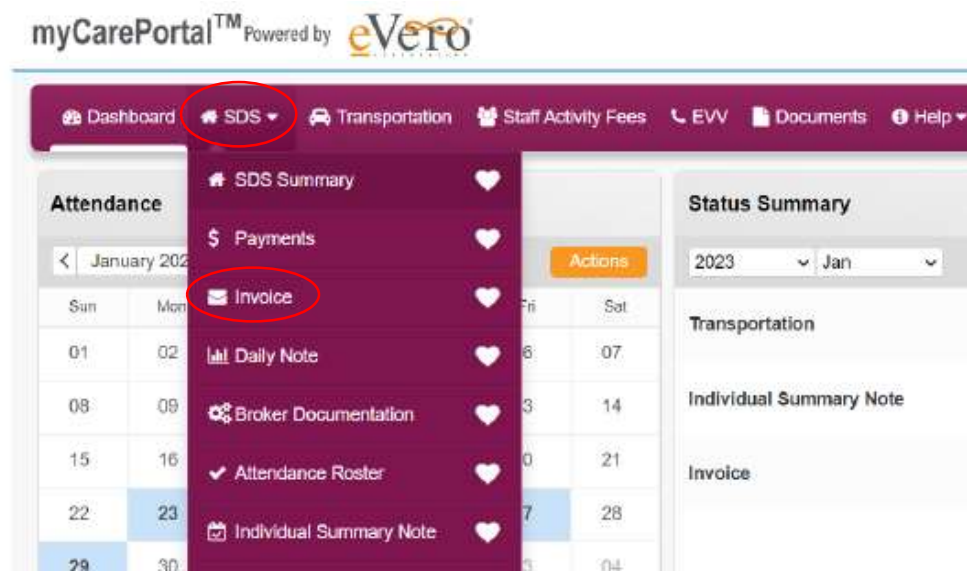
**Review Pending**

EVV Fact Sheet

**Budget Summary**

100% SELFHIRED - Self-Hired Supported Employment (SEMP)  
Amount Allowed: \$2,600.00  
Balance: \$2,600.00

4. Select 'SDS' Dropdown
5. Select 'Invoice' to enter reimbursement request



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Dashboard SDS Transportation Staff Activity Fees EVV Documents Help

**Attendance**

< January 2023 > Actions

**SDS Summary**

- Payments
- Invoice
- Daily Note
- Broker Documentation
- Attendance Roster
- Individual Summary Note

**Status Summary**

2023 Jan

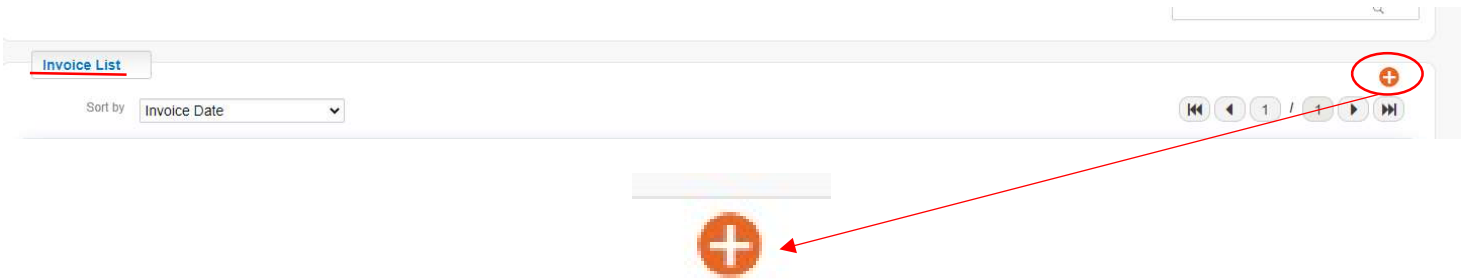
Transportation

Individual Summary Note

Invoice



6. Select the 'Orange Plus Sign' (top right-hand corner) under 'Invoice List'



7. Enter the following information for IDGS invoice submission

- Date of Service
- Program: Individual Directed Goods and Services (IDGS)
- Category
- Paid To: (person requesting reimbursement)
- Amount
- Description
- Attachments: itemized invoice and proof of payment (please note that all IDGS categories may vary in programmatic criteria)

|                                   |  |          |  |
|-----------------------------------|--|----------|--|
| Date Service Occurred/Will Occur: | 04/01/2023   | Program: | SDS-Individual Directed Goods & Services |
| Category:                         | Health Club/Organizational Memberships/Community Participation                                       |          |  |
| Paid to:                          | Jones, Joseph-Test   |          |  |
| Reimburse to:                     |  |          |  |
| Amount:                           | \$25.00  |          |  |
| Description:                      | Monthly Planet Fitness Membership  |          |  |
| Attachments:                      | <div>0.2 MB Annual Membership I Remove file</div> <div>0.2 MB Monthly Statement fo Remove file</div> |          |  |

Invoice Submission Notes:

- Only Self-Direction **categories in the current budget** will show
- 'Paid To' field **identifies who will receive payment** if this invoice is approved; in the event a direct payment is being requested the vendor associated will be used in this field
- 'Amount' should not exceed the amount of the **invoice**; amount will be verified against the remaining funds in the budget
- 'Description' field **describes the invoice** that is being submitted and communicates to support team/bookkeeping
- 'Attachments' field provides the user with the ability to **add supporting documentation for the invoice submission**

8. Once all fields are entered select the **orange 'Save'** button (bottom right-hand corner of window)

The screenshot shows a workflow progress bar at the top with five steps: Submitted, Verified, Check Requested, Approved, and Paid. Below the progress bar, there is a checkbox for '1099 Required:' and a text area for 'Check Memo:'. At the bottom right, there are two buttons: 'Save' (orange) and 'Cancel' (orange). The 'Save' button is circled in red. Below the buttons, it says 'Budget effective date : 01/01/2023'.

9. Saved invoices will populate as '**Submitted**'

The screenshot shows the same workflow progress bar as before, but now the 'Submitted' status is highlighted with a green checkmark and is circled in red. The '1099 Required:' checkbox and 'Check Memo:' text area are still present. At the bottom right, there is a 'View History' link and two icons: a pencil (edit) and a trash can (delete). Below these icons, it says 'Budget effective date : 01/01/2023'.

- To edit select **orange pencil**
- To delete select **orange trashcan**

This is a close-up of the bottom right corner of the form. It shows the 'View History' link, the 'Budget effective date : 01/01/2023' text, and the edit (pencil) and delete (trash can) icons. The icons are circled in red.