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.

Reimbursable Services Team: Preapproval- 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 directly to the reimbursable services team at preapproval@aimservicesinc.org

AIM Self-Direction Web Portal- https://www.aimservicesinc.org/self-direction/

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

Self-Direction Education Calendar- optional live virtual trainings held on Zoom for Self-Direction team members to learn more about fundamental supports, services, and software systems
Link: https://www.aimservicesinc.org/self-direction/education-calendar/

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

Individual Directed Goods & Services (IDGS) Reimbursement Steps

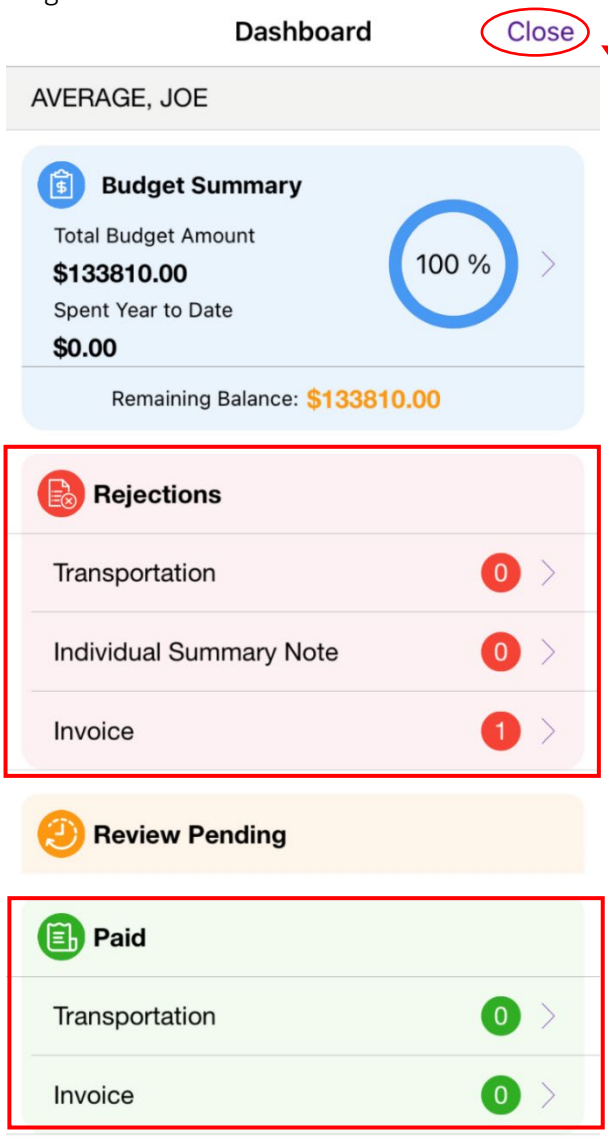
eVeroPortal App

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



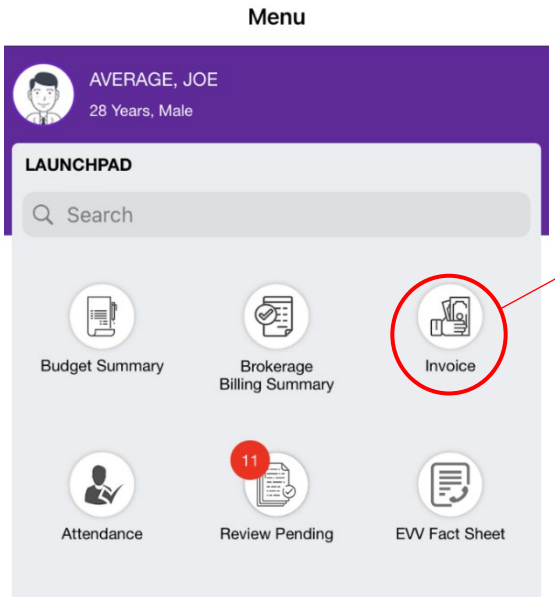
Forgotten User/Password:
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

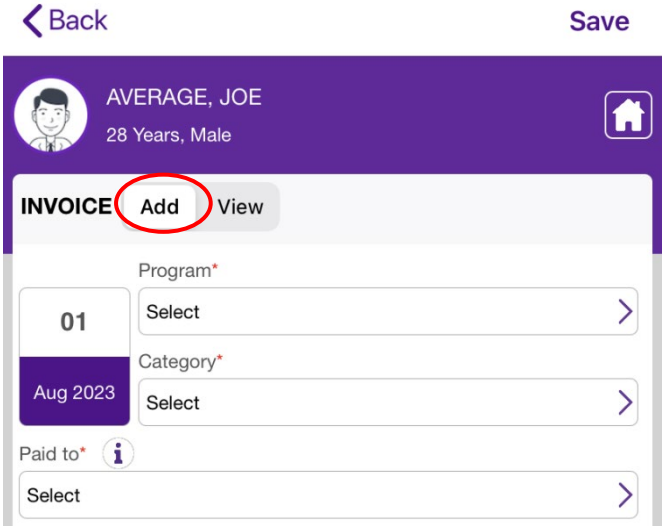
3. eVeroPortal App user can review 'Dashboard' screen for Invoice Status (Rejections or Paid section) upon login:



Dashboard Note: Select Close in the top right-side corner to access Menu Launchpad

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

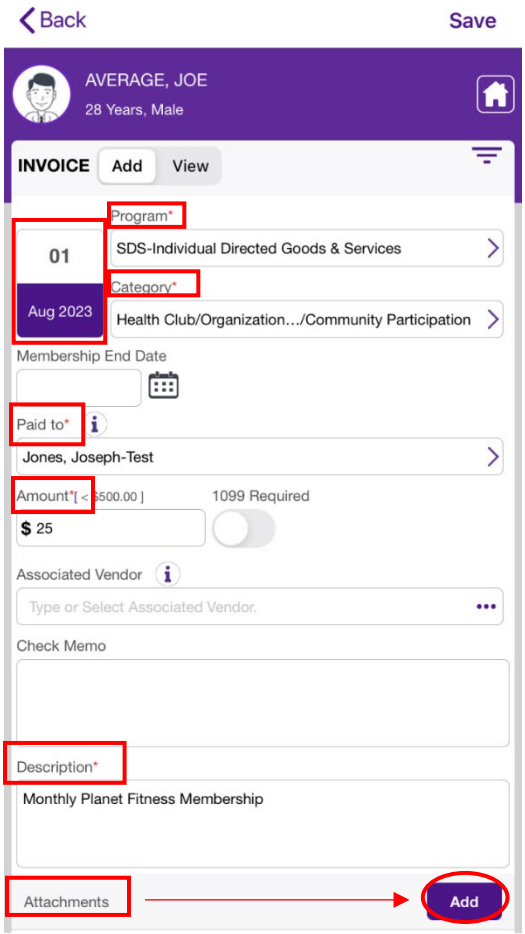




Invoice Submission Note:

- **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**

6. 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)

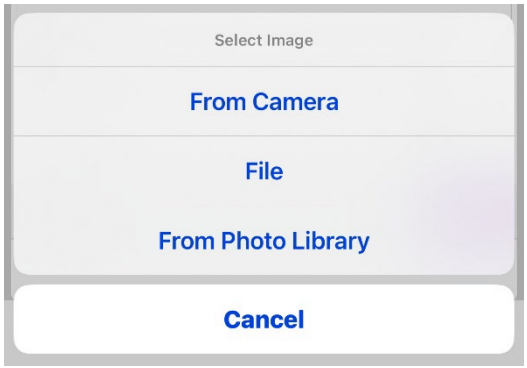


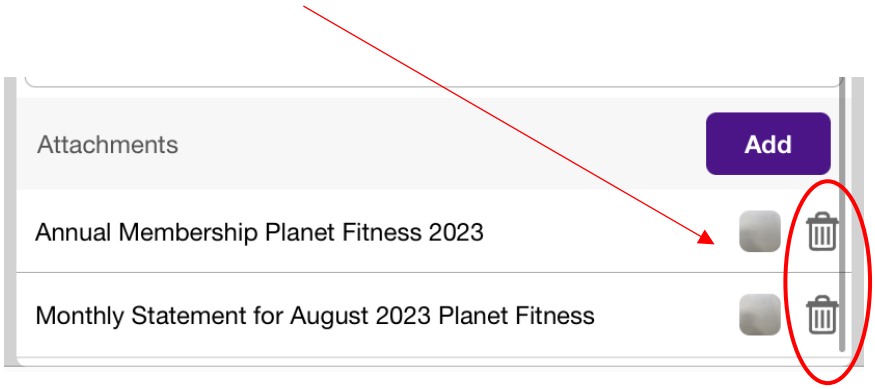
Attachment Note:

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

- 'From Camera'
- 'File'
- 'From Photo Library'

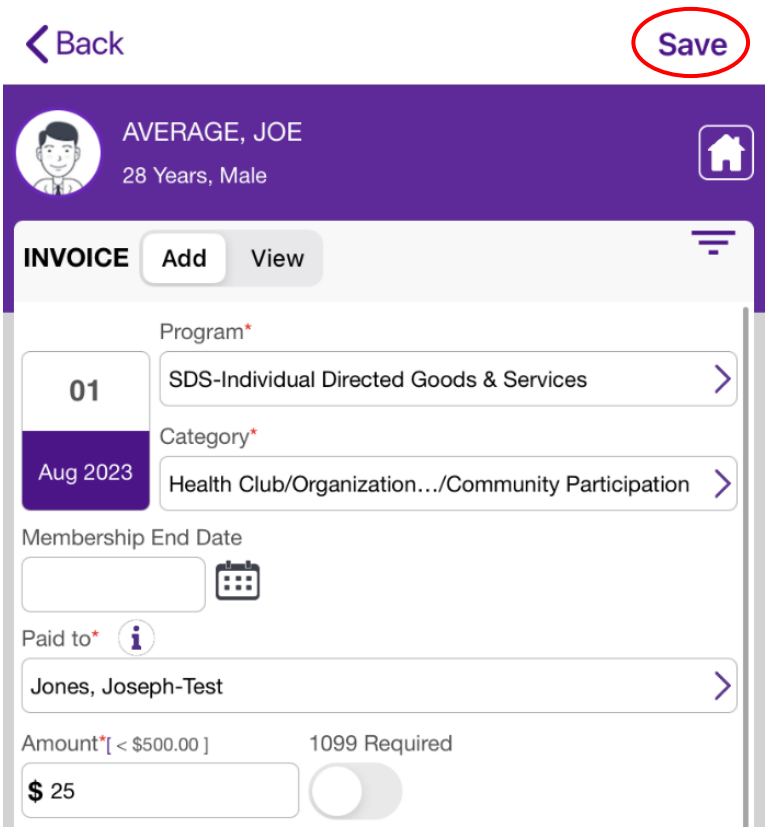
(to delete attachment, select the 'trashcan' icon)

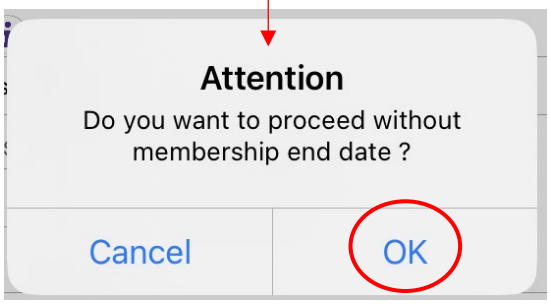




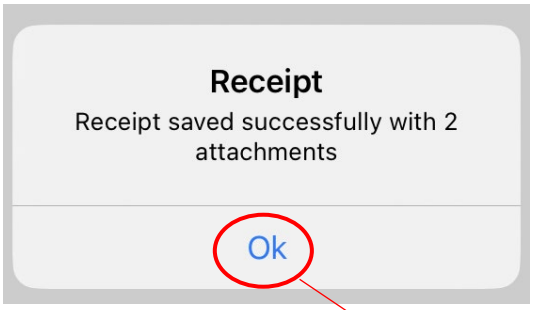
7. Once all fields are entered select the purple 'Save' button (top right-hand corner of screen)

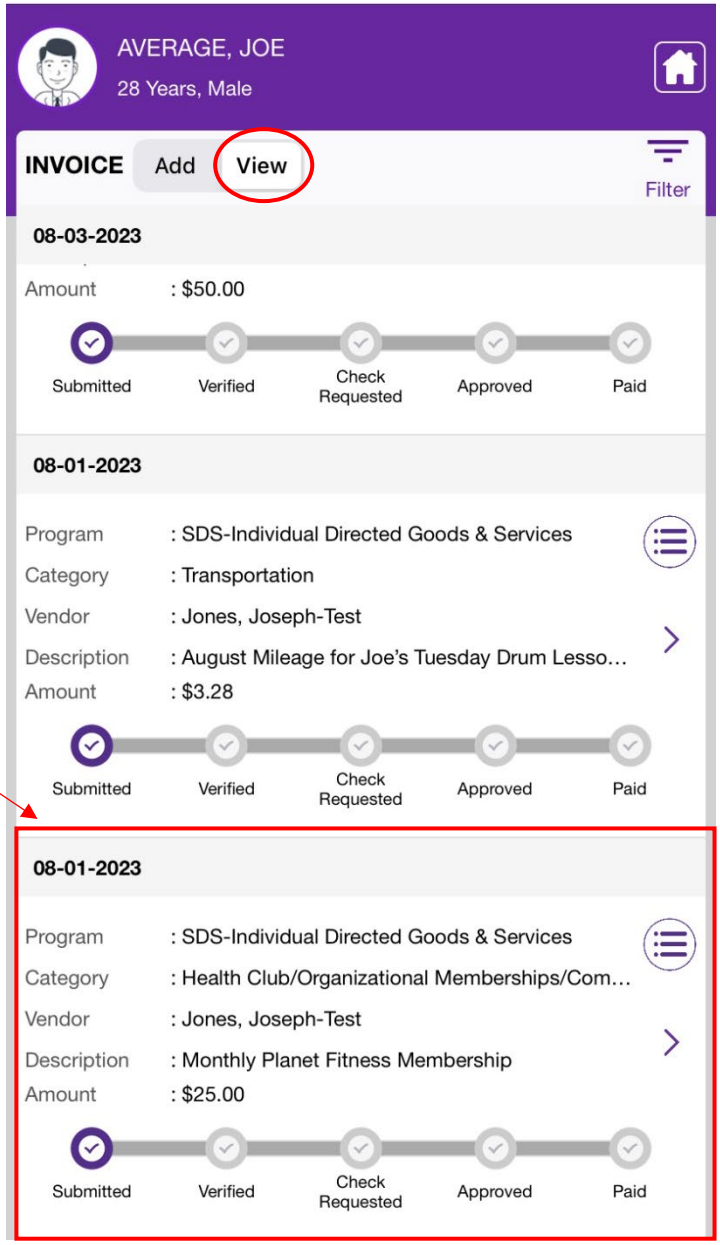
Membership end date not required



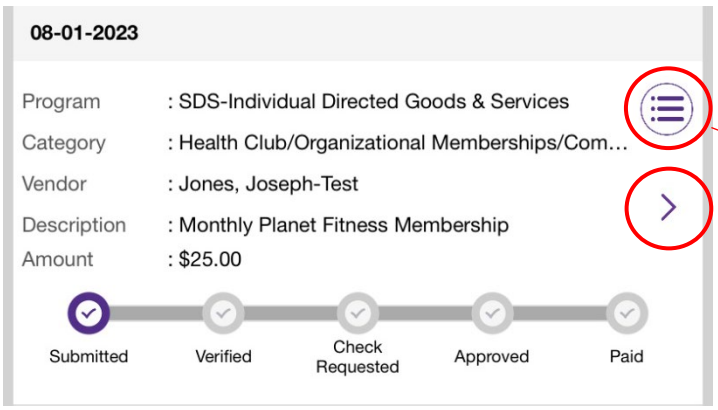


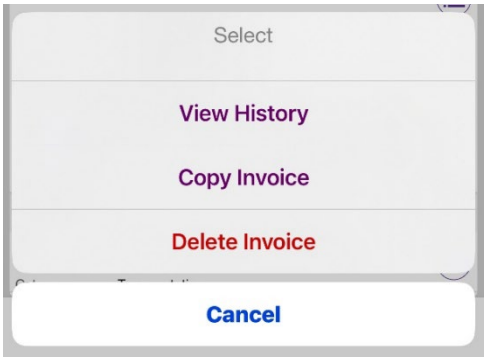
8. Saved invoices will populate as 'Submitted' under the 'view' selection





- To delete: select purple dropdown icon on specific invoice; select 'Delete Invoice' to permanently delete
- To copy: select purple dropdown icon on specific invoice; select 'Copy Invoice' then select 'Yes' to copy
- To edit: select purple arrow on specific invoice





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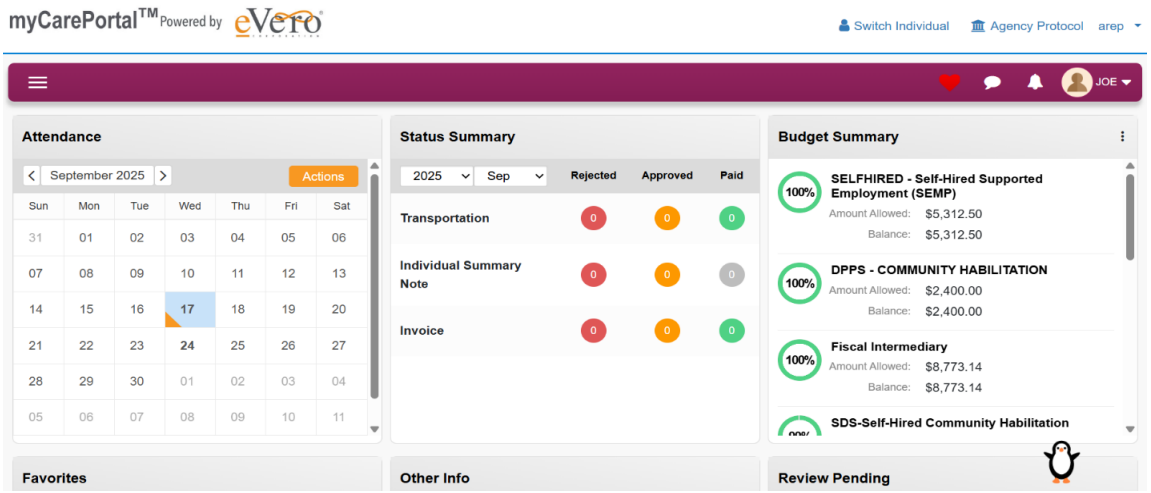
eVeroPortal Website

1. Log into eVeroPortal at signin.evero.com
   *Username and Password selected by user
2. Select 'Sign In'

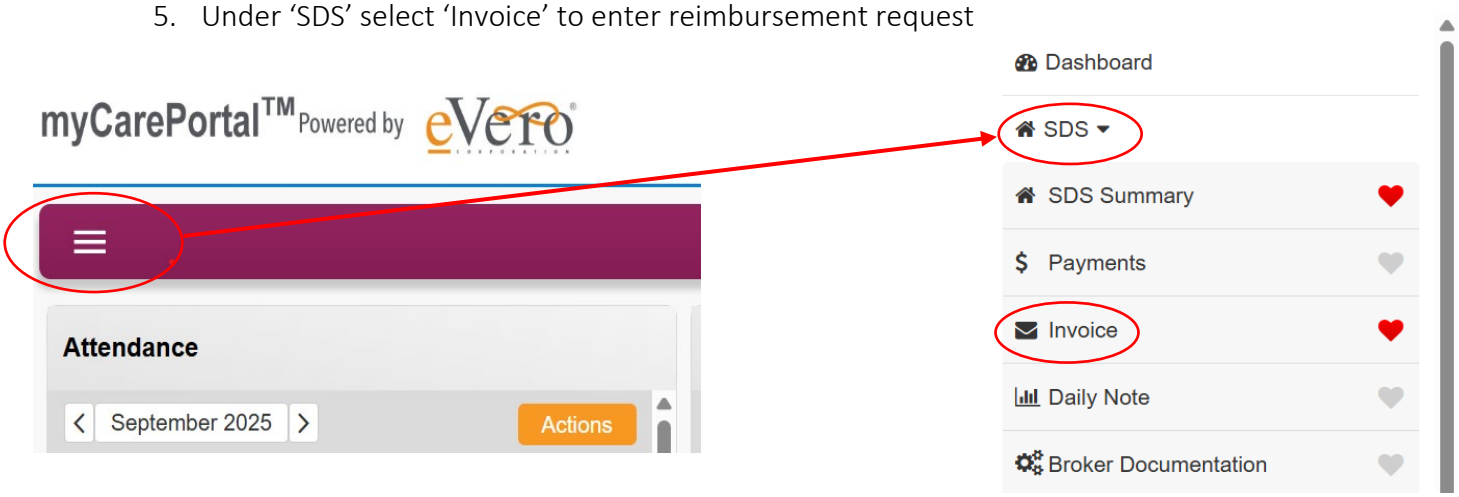


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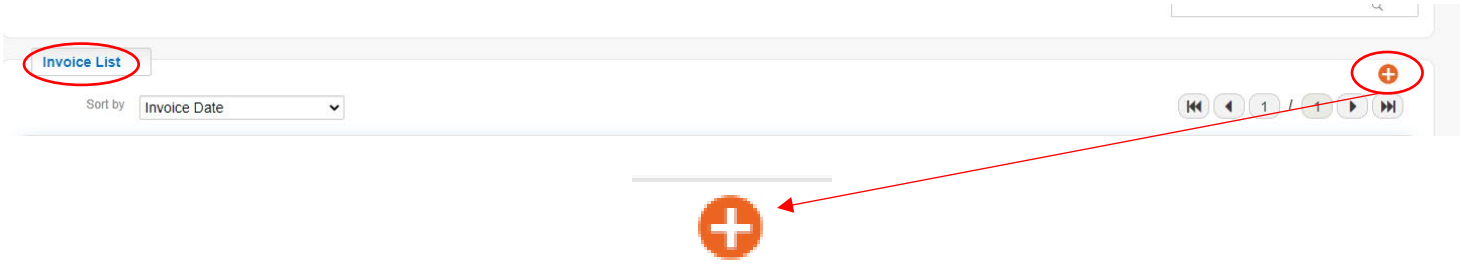
3. Once signed in, the user will be shown the account summary page



4. Select the three-line dropdown in top left corner to open menu dropdown
5. Under 'SDS' select 'Invoice' to enter reimbursement request

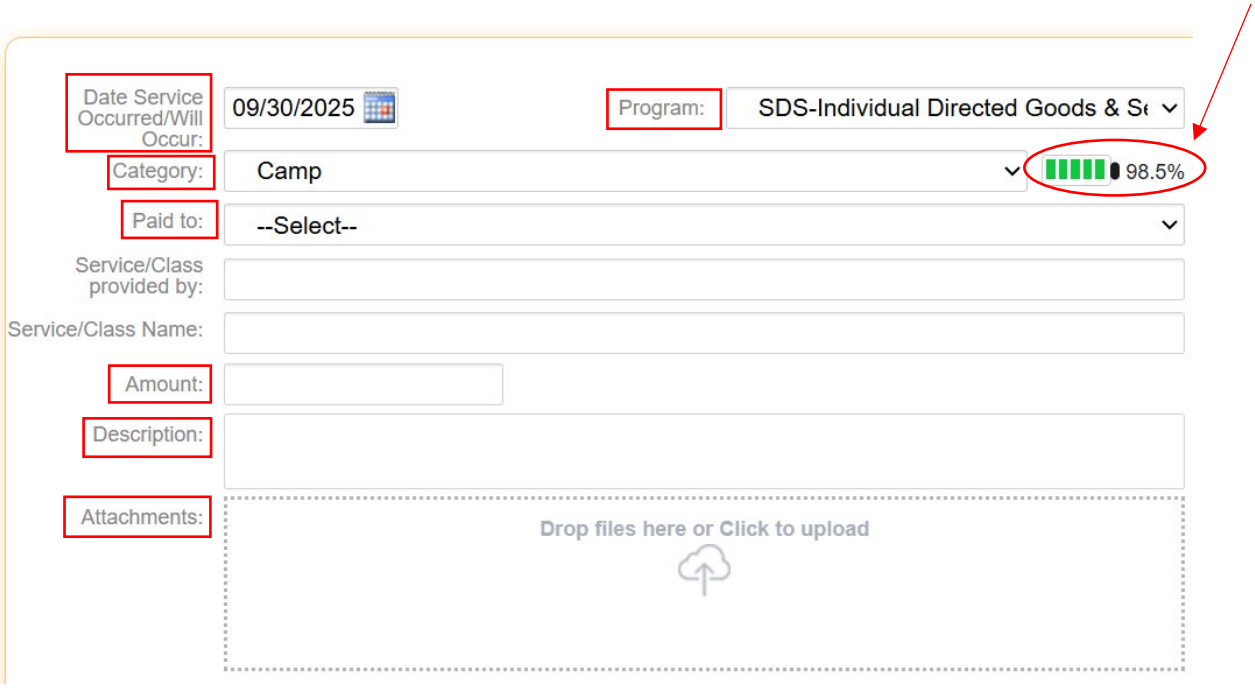


6. Select the 'Orange Plus Sign' (top right-hand corner) under 'Invoice List'



7. Enter the following information for IDGS invoice submission
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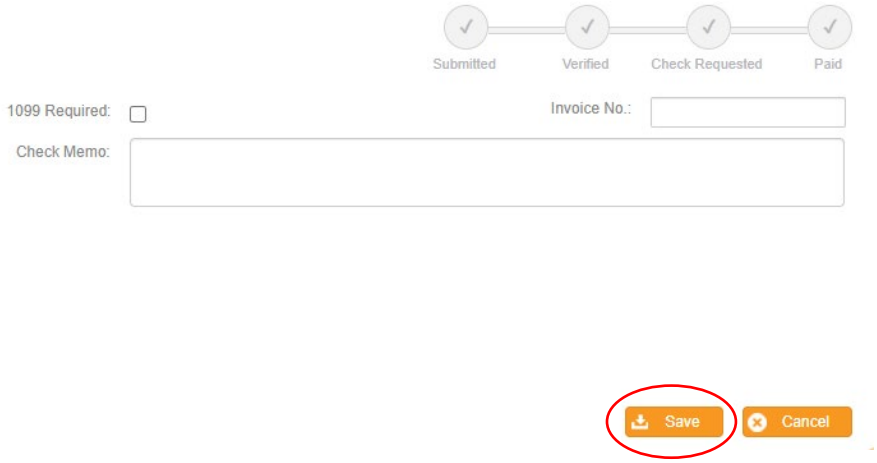
Invoice Note: After selecting the applicable program and category, the funding status and battery bar icon for that specific funding line will appear to the right of the category dropdown to assist with managing available budget balances in real-time



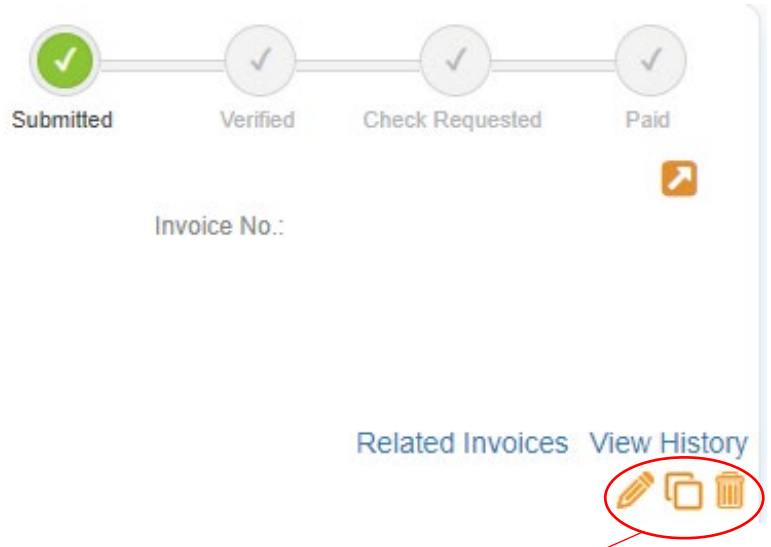
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8. Once all fields are entered select the orange 'Save' button (bottom right-hand corner of window)



9. Saved invoices will populate as 'Submitted'



- To edit select orange pencil
- To copy invoice, select copy icon
- To delete select orange trashcan