

Individual Directed Goods & Services (IDGS) Transportation Reimbursement Steps

eVeroPortal App and Website

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



Sign in to continue

Username [Forgot your username?](#)

Password [Forgot your password?](#)

[Sign In](#)


[Forgot your login information?](#)

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

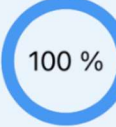
Dashboard


Close

AVERAGE, JOE



Budget Summary


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


100 %


Rejections

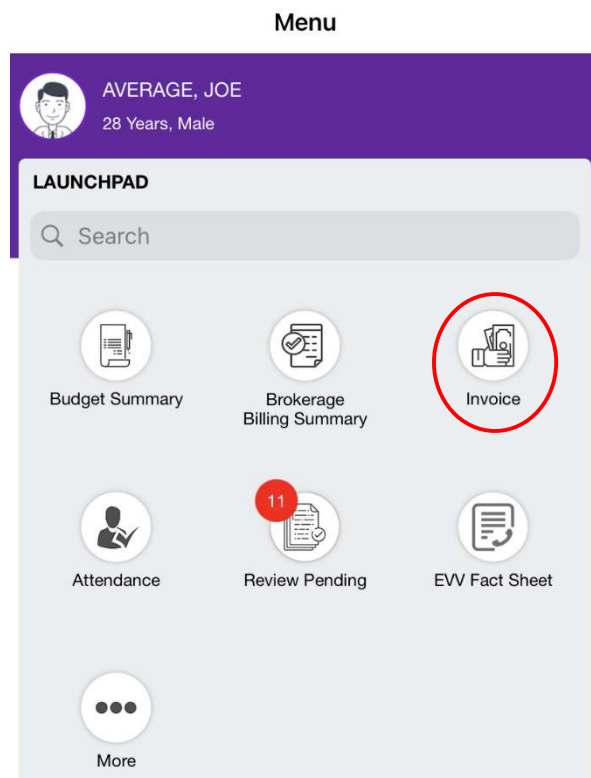
Transportation	0	>
Individual Summary Note	0	>
Invoice	1	>


Review Pending

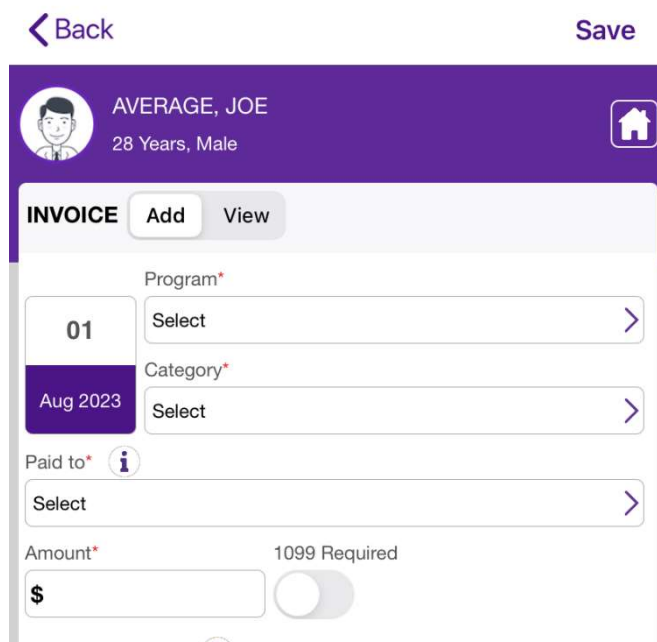

Paid

Transportation	0	>
Invoice	0	>

4. Select 'Invoice' icon on the Menu Launchpad



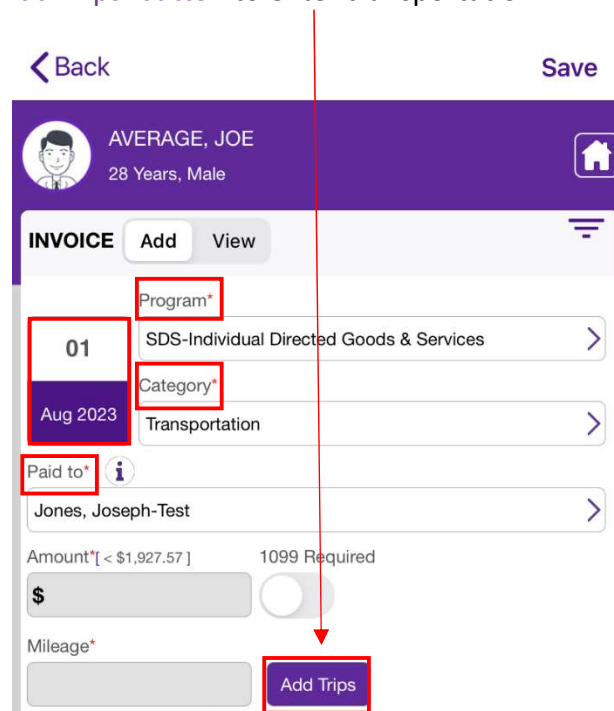
5. Select 'Add' to enter reimbursement request



Entering Transportation

(mileage entered directly on the eVeroPortal App)

1. To add a new invoice, select invoice icon; select 'Add' invoice to submit reimbursement request
2. Enter the following information for IDGS Transportation
 - Date of Service (if entering multiple dates use last date of service)
 - Program: Individual Directed Goods and Services (IDGS)
 - Category: Transportation
 - Paid To: (person requesting reimbursement)
3. Select **purple 'Add Trips' button** to enter transportation



Back Save

AVERAGE, JOE
28 Years, Male

INVOICE Add View

Program*
01 SDS-Individual Directed Goods & Services

Aug 2023
Category*
Transportation

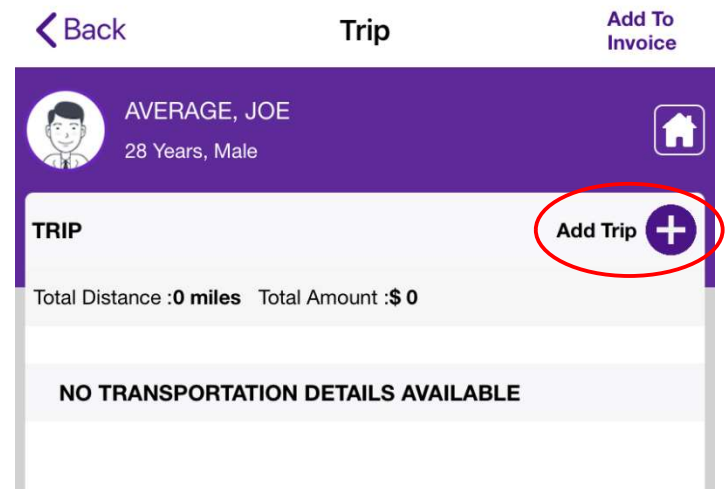
Paid to*
Jones, Joseph-Test

Amount* [< \$1,927.57] 1099 Required

Mileage*
Add Trips

4. To add trip, select the **purple plus sign** (right-hand side of screen)

Trips Window:



Back Trip Add To Invoice

AVERAGE, JOE
28 Years, Male

TRIP

Total Distance :0 miles Total Amount :\$ 0

NO TRANSPORTATION DETAILS AVAILABLE

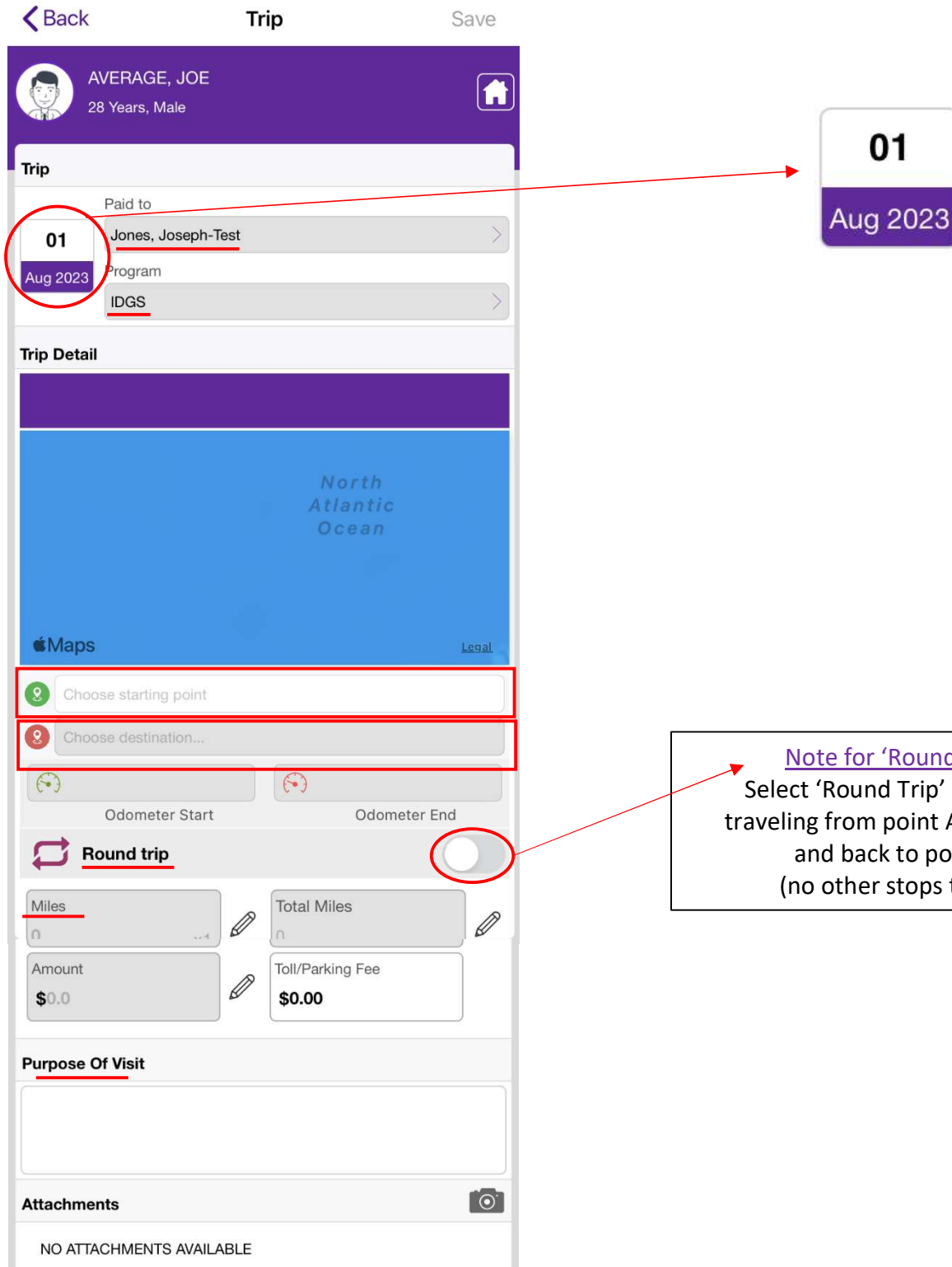
Add Trip +

Details of Trip Window:

5. Under 'Trip Detail' enter the following information:

- Date of Service (using the calendar icon to select appropriate date of service)
- Starting Point/Destination ('Start' indicated by a green icon; 'Stop' indicated by a red icon)
- Roundtrip
 - only for traveling from point A to point B and back to point A (no other stops taken)
- Miles
- Purpose of Visit
- Paid To: (auto-populates to the person selected for reimbursement)
- Amount* (auto-populates when miles are entered)

Please Note: Odometer reading is not required for mileage entry



Trip

PAID TO

01 Aug 2023 Jones, Joseph-Test

TRIP DETAIL

Choose starting point

Choose destination...

Odometer Start Odometer End

Round trip

Miles Total Miles

Amount \$0.00 Toll/Parking Fee \$0.00

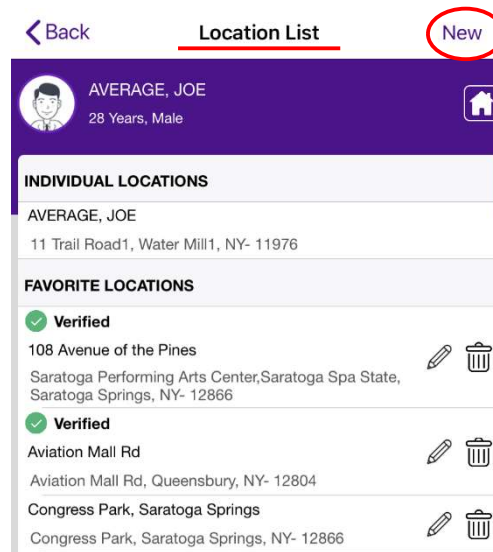
Purpose Of Visit

Attachments

NO ATTACHMENTS AVAILABLE

Note for 'Round Trip'
Select 'Round Trip' if you are traveling from point A to point B and back to point A (no other stops taken)

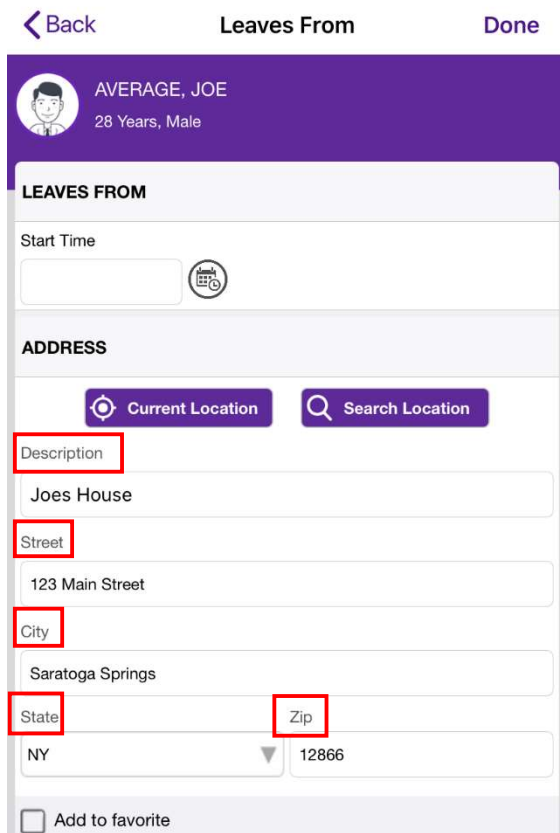
6. Locations List will populate with any favorited locations (user can edit or delete by swiping left on locations box)
7. Select 'New' to enter new location



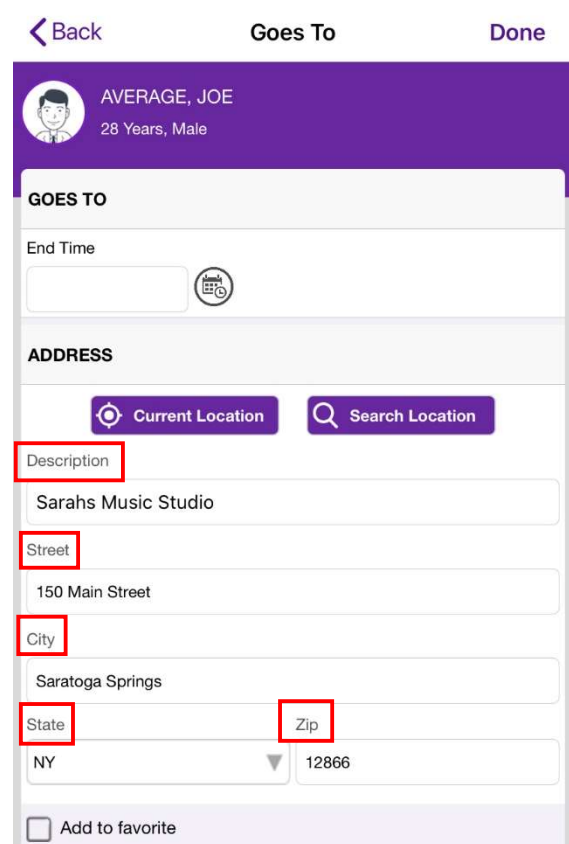
The screenshot shows the 'Location List' screen for a user named 'AVERAGE, JOE' (28 Years, Male). At the top, there are navigation buttons: '< Back', 'Location List' (underlined), and 'New' (circled in red). Below the header, there is a section for 'INDIVIDUAL LOCATIONS' with one entry: 'AVERAGE, JOE' at '11 Trail Road1, Water Mill1, NY- 11976'. Below that is a section for 'FAVORITE LOCATIONS' with three entries, each marked as 'Verified' with a green checkmark. The first favorite location is '108 Avenue of the Pines' at 'Saratoga Performing Arts Center, Saratoga Spa State, Saratoga Springs, NY- 12866'. The second is 'Aviation Mall Rd' at 'Aviation Mall Rd, Queensbury, NY- 12804'. The third is 'Congress Park, Saratoga Springs' at 'Congress Park, Saratoga Springs, NY- 12866'. Each favorite location has edit and delete icons (pencil and trash) to its right.

8. Enter the following information for 'Leaves From' and 'Goes To'
 - Description
 - Street
 - City
 - State
 - Zip

Please Note: Start/Stop Times are not required for mileage entry

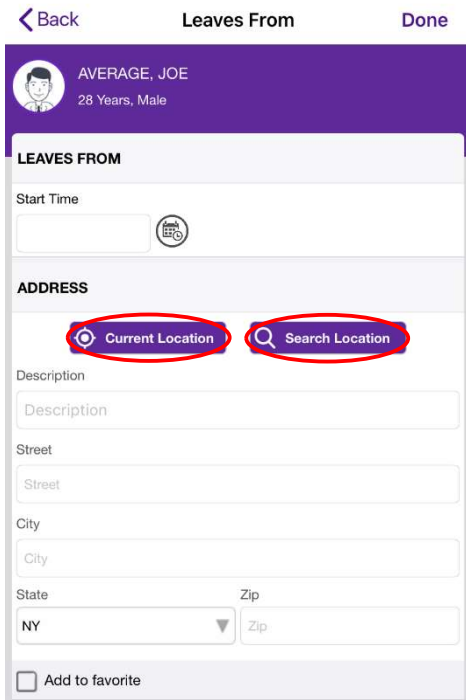
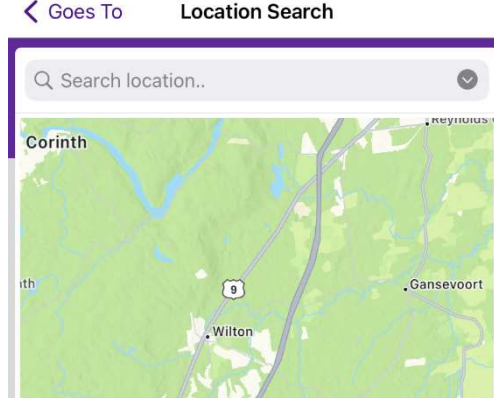
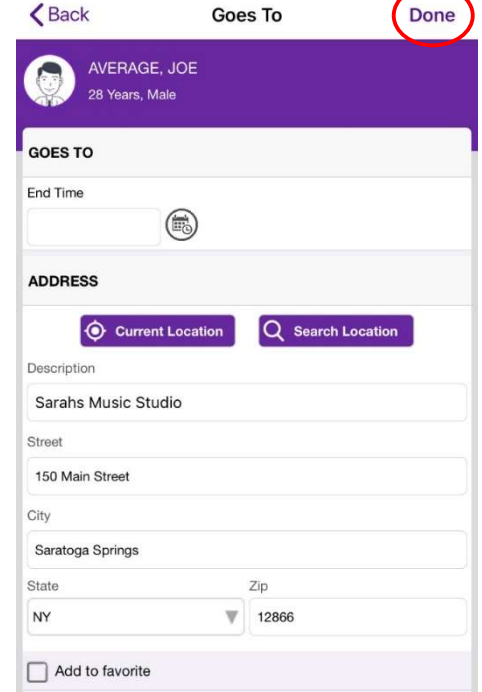


The screenshot shows the 'Leaves From' form for a user named 'AVERAGE, JOE' (28 Years, Male). At the top, there are navigation buttons: '< Back', 'Leaves From', and 'Done'. Below the header, there is a section for 'LEAVES FROM' with a 'Start Time' field and a clock icon. Below that is an 'ADDRESS' section with two buttons: 'Current Location' and 'Search Location'. The form fields are: 'Description' (red box), 'Joes House', 'Street' (red box), '123 Main Street', 'City' (red box), 'Saratoga Springs', 'State' (red box), 'NY', 'Zip' (red box), '12866', and an 'Add to favorite' checkbox at the bottom.



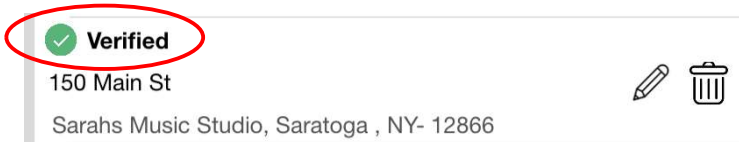
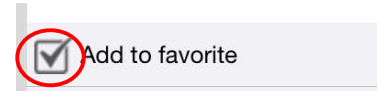
The screenshot shows the 'Goes To' form for a user named 'AVERAGE, JOE' (28 Years, Male). At the top, there are navigation buttons: '< Back', 'Goes To', and 'Done'. Below the header, there is a section for 'GOES TO' with an 'End Time' field and a clock icon. Below that is an 'ADDRESS' section with two buttons: 'Current Location' and 'Search Location'. The form fields are: 'Description' (red box), 'Sarabs Music Studio', 'Street' (red box), '150 Main Street', 'City' (red box), 'Saratoga Springs', 'State' (red box), 'NY', 'Zip' (red box), '12866', and an 'Add to favorite' checkbox at the bottom.

9. For 'Current Location' select 'Current Location' (upper left-hand side of screen)
10. To 'Search Location' select 'Search Location' (upper right-hand side of screen)
11. Once location is selected the address will populate; select 'Done' to continue entry


Please Note:

- To add frequented addresses to favorites: select 'Add to Favorites' (selection indicated by grey checkbox and will populate on locations list)
- 'Verified' addresses indicate the location was captured with GPS confirmation through the app


12. Verify number of miles traveled under 'Miles' and 'Total Miles'
13. If miles are 'Round Trip' select 'Round Trip' (selection indicated by purple toggle)
14. Reimbursement amount will calculate under 'Amount'
15. Enter note on visit under 'Purpose of Visit'
16. If mileage requires attachments due to parking fees/tolls attach using the camera icon and select 'From Camera' or 'From Photo Library'
17. Select 'Save' to save mileage entry

[< Back](#)
Trip
Save



AVERAGE, JOE

28 Years, Male



123 Main Street

South Atlantic Ocean


Apple Maps Legal

Joes House

150 Main St

Odometer Start

Odometer End


Round trip

Miles

5 x2

Total Miles

10.00

Amount

\$3.28

Toll/Parking Fee

\$0.00

Purpose Of Visit

Tuesday Drum Lessons

Attachments

NO ATTACHMENTS AVAILABLE

Note for 'Round Trip'

Select 'Round Trip' if you are traveling from point A to point B and back to point A (no other stops taken)

<p>Miles</p> <p>5 x2</p>	<p>Total Miles</p> <p>10.00</p>
<p>Amount</p> <p>\$3.28</p>	<p>Toll/Parking Fee</p> <p>\$0.00</p>

Purpose Of Visit

Tuesday Drum Lessons

Select Image

[From Camera](#)

[From Photo Library](#)

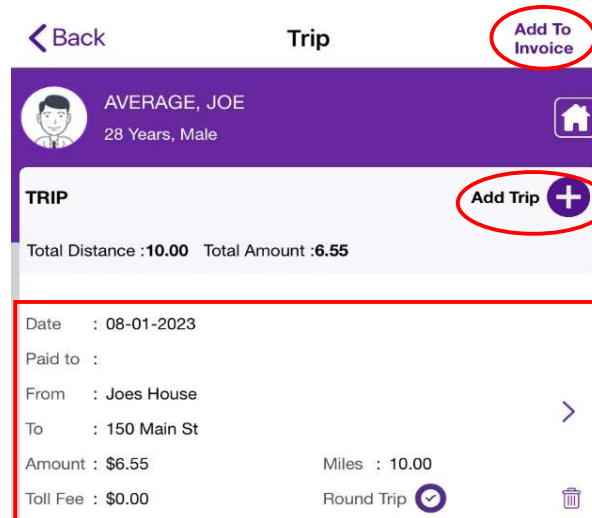
[Cancel](#)

18. 'Trip Details' will populate a summary in the invoice's trips list

19. To save trips list invoice select 'Add To Invoice' (purple button at the top right-hand side of screen)

Please note:

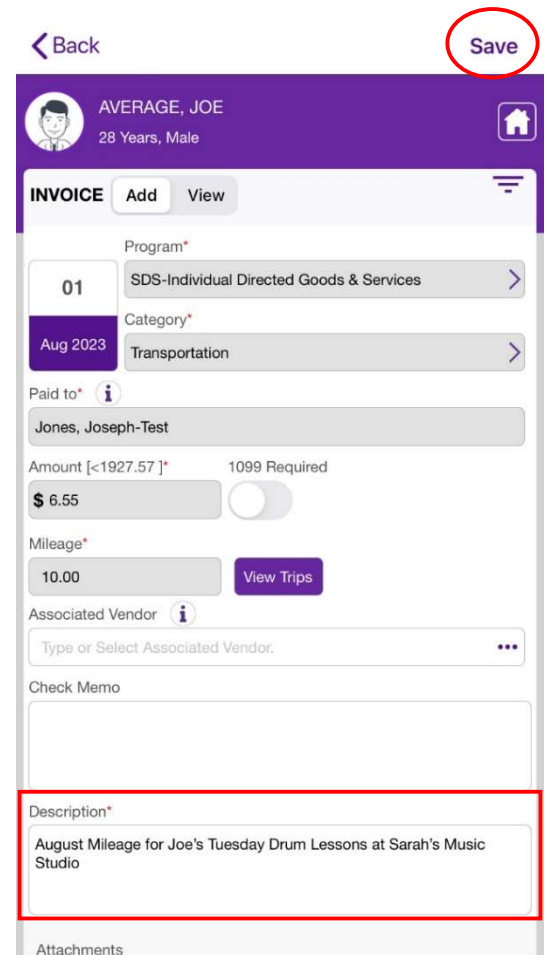
For additional entries to an invoice select the 'Add Trip' button (purple plus sign at the right-hand side of screen)



- To edit 'Trip Details': select purple arrow on specific trip →
- To delete 'Trip Details': select purple trashcan icon on specific trip; select 'Delete Invoice' to permanently delete →

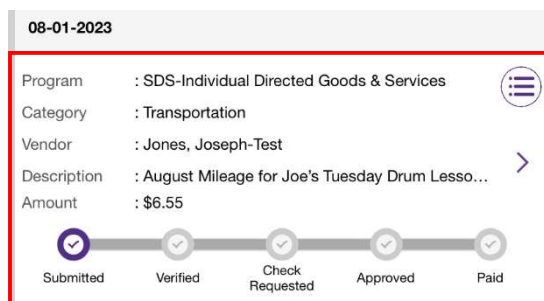
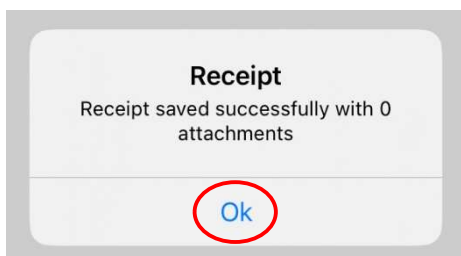
20. Enter the invoice description (invoice will indicate mileage entered and reimbursement amount)

21. To save, select 'Save' (upper right-hand side of screen) once all information has been reviewed

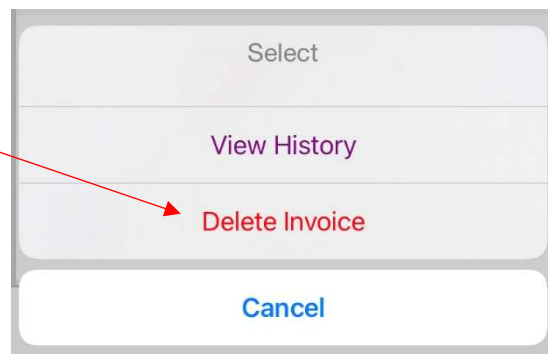
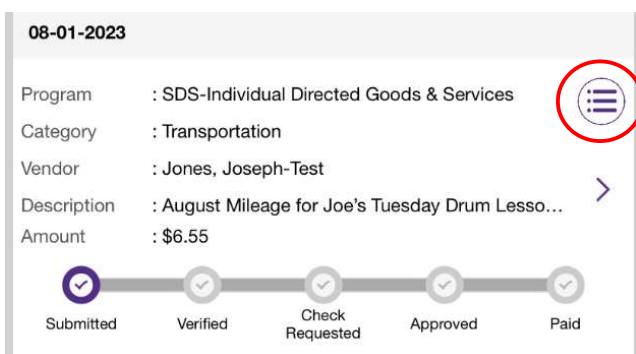


22. Attention screen will indicate mileage was saved successfully; Select 'OK'

23. Invoice will populate in the app as 'Submitted'



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



Entering Transportation

(mileage entered directly on the eVero MyCarePortal)

1. Log into eVeroPortal at 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?](#)

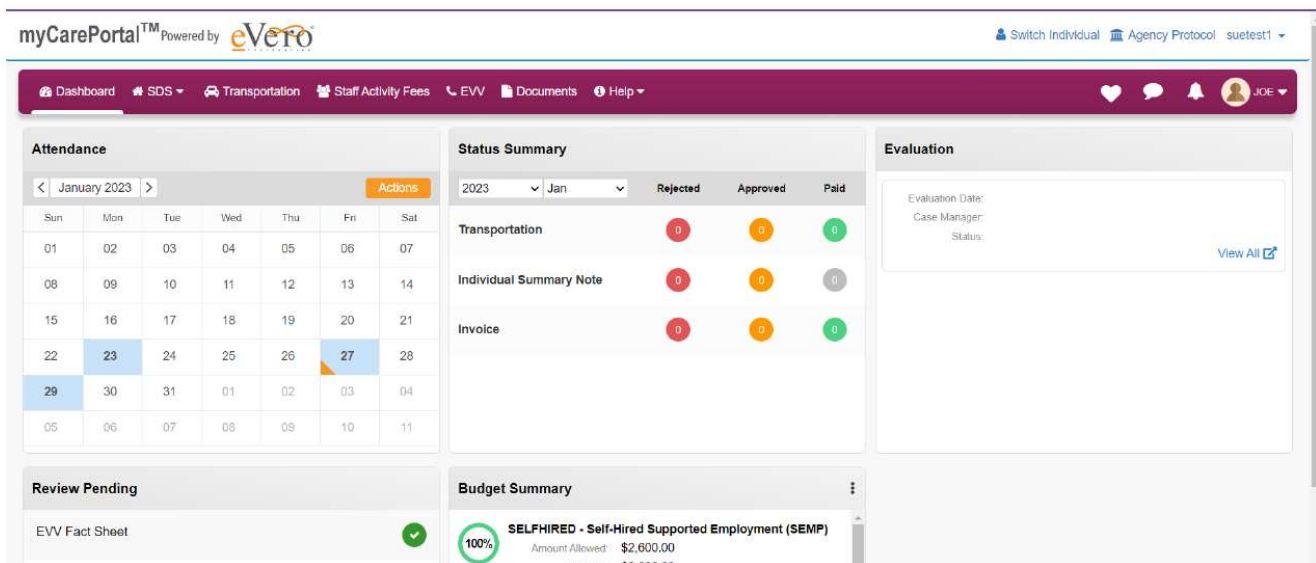
[Sign In](#)

[Forgot your login information?](#)

Forgotten User/Password:

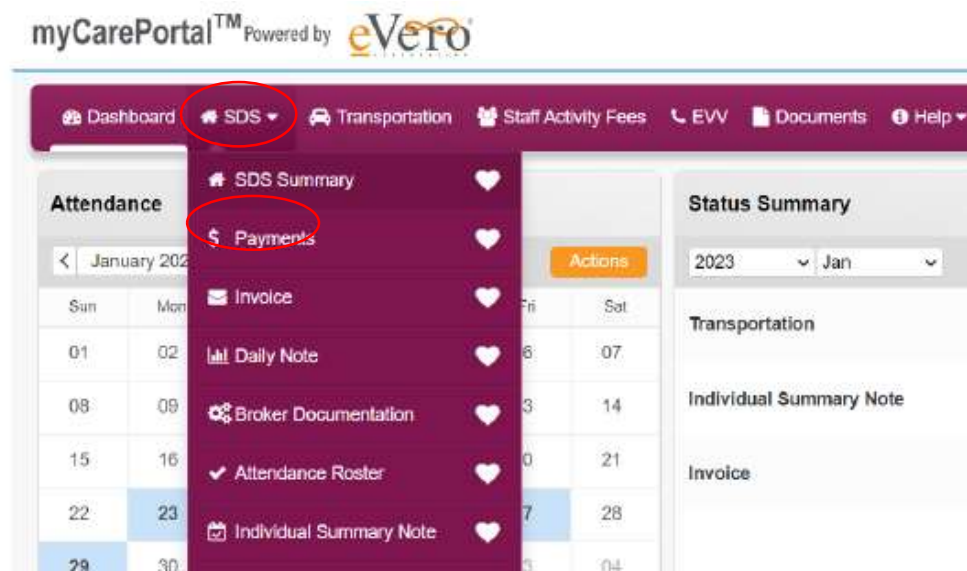
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

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



The screenshot shows the myCarePortal account summary page. The top navigation bar includes links for Dashboard, SDS, Transportation, Staff Activity Fees, EVV, Documents, and Help. The main content area is divided into several sections: Attendance (calendar view for January 2023), Status Summary (table with columns for Rejected, Approved, and Paid), Evaluation (form for Evaluation Date, Case Manager, and Status), Review Pending (EVV Fact Sheet), and Budget Summary (SELFHIRED - Self-Hired Supported Employment (SEMP) with a 100% completion indicator).

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

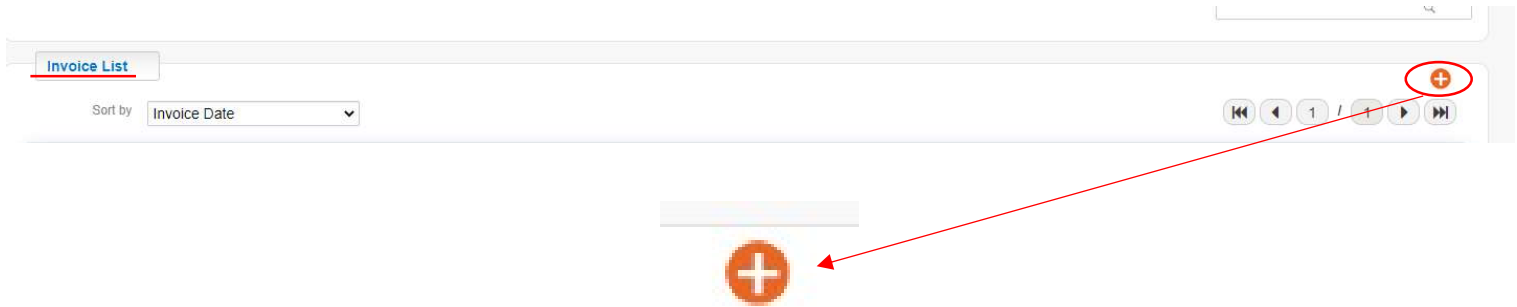


The screenshot shows the myCarePortal SDS dropdown menu. The menu is open, displaying options: SDS Summary, Payments, Invoice, Daily Note, Broker Documentation, Attendance Roster, and Individual Summary Note. The 'Payments' option is highlighted with a red circle.

Entering Transportation

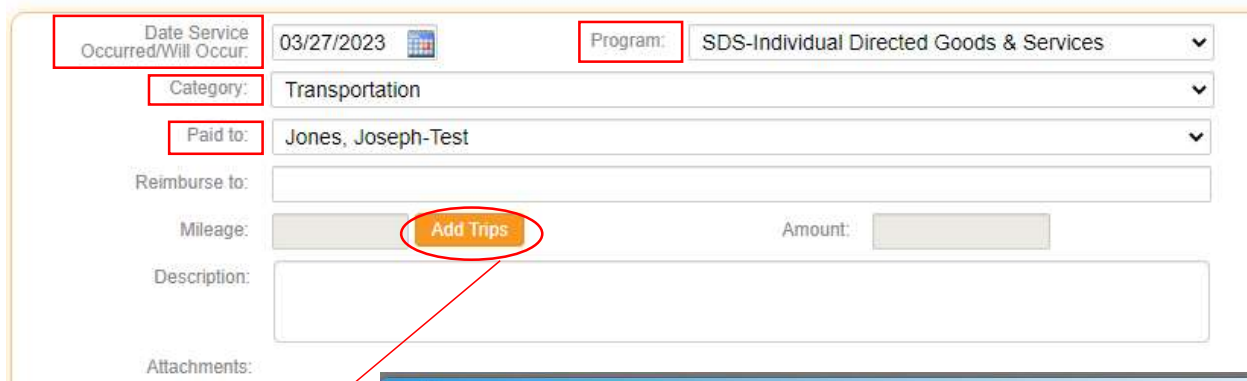
(mileage is entered directly on the eVeroPortal Website)

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

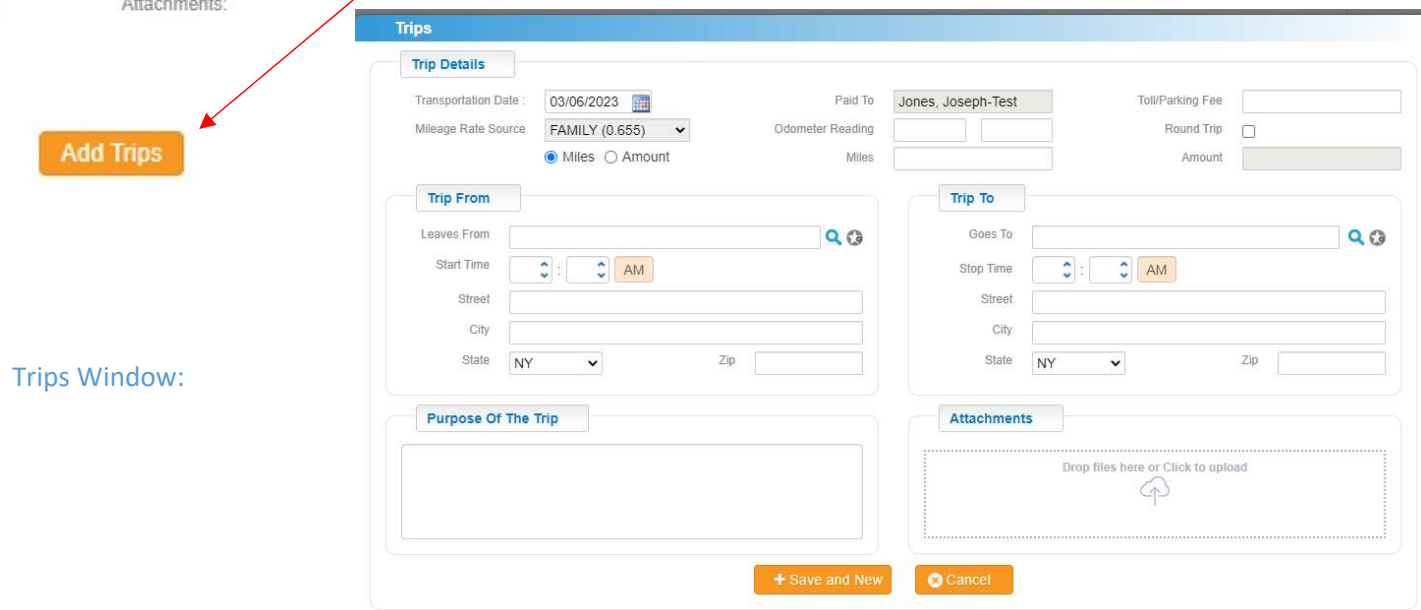


2. Enter the following information for IDGS Transportation
 - o Date of Service (if entering multiple dates use last date of service)
 - o Program: Individual Directed Goods and Services (IDGS)
 - o Category: Transportation
 - o Paid To: (person requesting reimbursement)

3. Select orange 'Add Trips' button to enter transportation

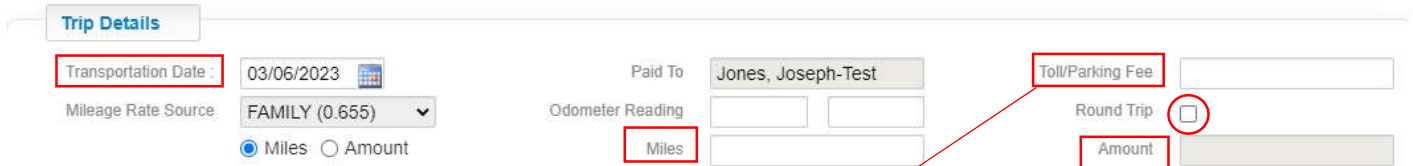


Trips Window:



Details of Trip Window:

4. Under 'Trip Details' enter the following information:
 - Date of Service
 - Miles
 - Roundtrip
 - i. only for traveling from point A to point B and back to point A (no other stops taken)
 - Paid To: (auto-populates to the person selected for reimbursement)
 - Amount* (auto-populates when miles are entered)



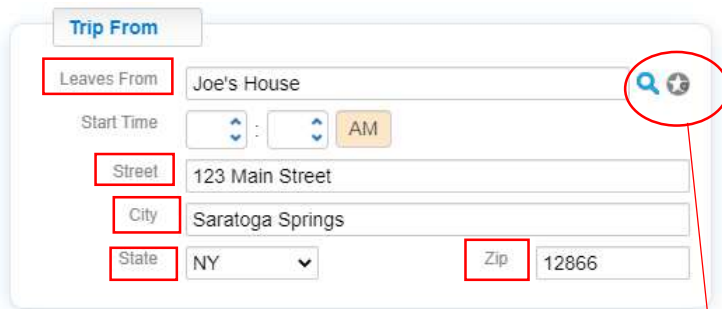
The screenshot shows the 'Trip Details' form with the following fields highlighted by red boxes: 'Transportation Date' (03/06/2023), 'Mileage Rate Source' (FAMILY (0.655)), 'Paid To' (Jones, Joseph-Test), 'Odometer Reading' (Miles), 'Toll/Parking Fee', 'Round Trip' (checkbox), and 'Amount'.

- Toll/Parking Fee entered in the following field (must have associated attachments for reimbursement)

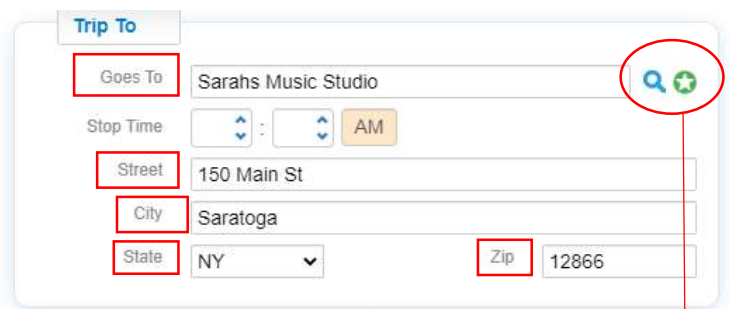
Toll/Parking Fee

5. Enter the following information for 'Trip From' and 'Trip To'

- Leaves From/Goes To
- Street
- City
- State
- Zip



The screenshot shows the 'Trip From' form with the following fields highlighted by red boxes: 'Leaves From' (Joe's House), 'Start Time' (AM), 'Street' (123 Main Street), 'City' (Saratoga Springs), 'State' (NY), and 'Zip' (12866). A red circle highlights the search and star icons on the right side of the 'Leaves From' field.



The screenshot shows the 'Trip To' form with the following fields highlighted by red boxes: 'Goes To' (Sarabs Music Studio), 'Stop Time' (AM), 'Street' (150 Main St), 'City' (Saratoga), 'State' (NY), and 'Zip' (12866). A red circle highlights the search and star icons on the right side of the 'Goes To' field.

6. To save frequented addresses enter full address and select the grey star icon (righthand side of 'Leaves From'/'Goes To')



7. Saved addresses to 'Favorite Address' indicated by a green star icon (righthand side of 'Leaves From'/'Goes To')



8. Enter 'Favorite Address' list by selecting blue search icon



9. To delete favorited addresses, select red X symbol (righthand side of screen)

Favorite Address


Favorite Address

Name	Street	City	State	Zip	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Joe's House	123 Main Street	Saratoga Springs	NEW YORK	12866	
4227 NY-50 Saratoga Springs, NY 12866	4227 NY-50	Saratoga Springs	NEW YORK	12866	
Sarahs Music Studio	150 Main St	Saratoga	NEW YORK	12866	

10. Once addresses are entered, describe the purpose of the trip in the following field:

Purpose Of The Trip


Monday Drum Lessons



11. Enter any attachments necessary for reimbursement

Attachments

Drop files here or Click to upload




12. Select orange 'Save and New' button to save transportation entry and begin new entry

+ Save and New

13. Saved trips will populate under 'Trip List'



Trip List


Transportation Date	Miles	Amount	Toll/Parking Fee	Trip From	Trip To	Purpose of the trip	
03/06/2023	10	\$6.55	\$0.00	Joe's House	Sarahs Music Studio	Monday Drum Lessons	
03/27/2023	10	\$6.55	\$0.00	Joe's House	Sarahs Music Studio	Monday Drum Lessons	


14. Select orange 'Close' button once all trips are entered and saved in 'Trips List'

Close


15. Mileage and Amount will auto-populate once all trips are completed and saved
16. Enter a description of the transportation submission


Date Service Occurred/Will Occur: 03/27/2023  Program: SDS-Individual Directed Goods & Services 

Category: Transportation 

Paid to: Jones, Joseph-Test 






Reimburse to:

Mileage: 40  Amount: \$26.20

Description: March Mileage for Joe's Monday Drum Lessons at Sarah's Music Studio 



Attachments:

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

Submitted  Verified  Check Requested  Approved  Paid 

1099 Required: ☐

Check Memo:

Budget effective date : 01/01/2023

18. Saved invoices will populate as 'Submitted'

Date Service Occurred/Will Occur: 03/27/2023 Program: SDS-Individual Directed Goods & Services

Category: Transportation






Paid to: Jones, Joseph-Test

Reimburse to:

Mileage: 40 [View Trips](#) Amount: \$26.20

Description: March Mileage for Joe's Monday Drum Lessons at ...[View more](#)



Attachments:

Submitted  Verified  Check Requested  Approved  Paid 

1099 Required: ☐

Check Memo:

[View History](#)

Budget effective date : 01/01/2023  

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

[View History](#)

Budget effective date : 01/01/2023  