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

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

4. Select 'Invoice' icon on the Menu Launchpad
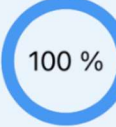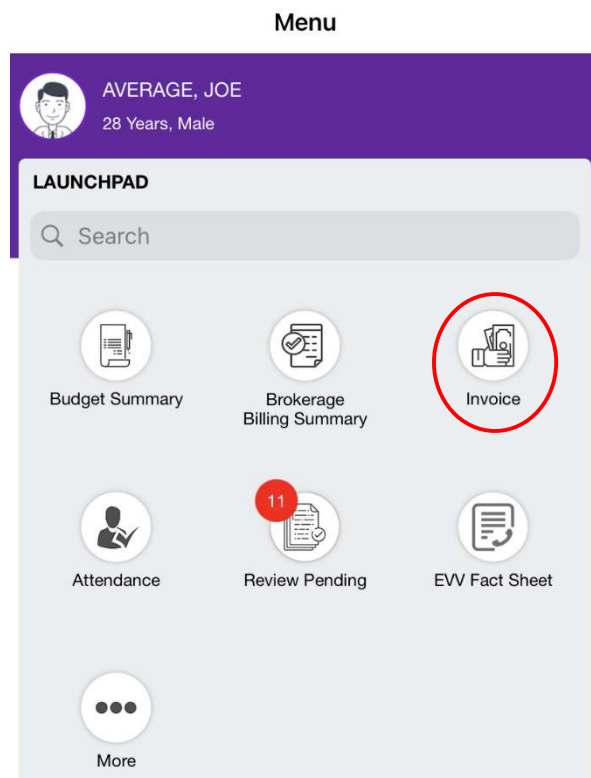

5. Select 'Add' to enter reimbursement request

Entering Transportation
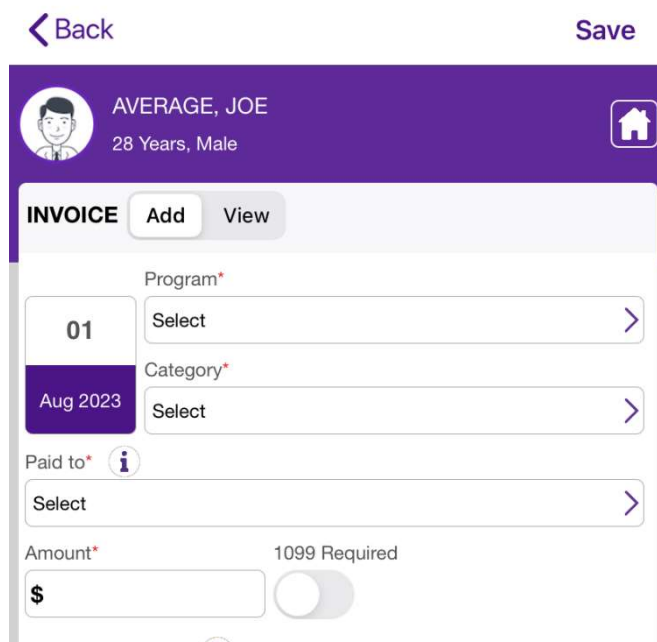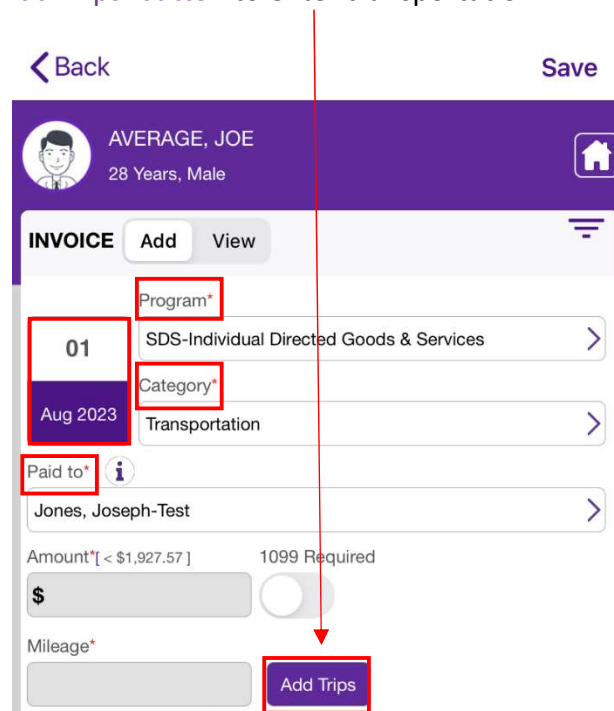
(mileage entered directly on the eVeroPortal App)

1. To add a new invoice, select invoice icon; select 'Add' invoice to submit reimbursement request

2. Enter the following information for IDGS Transportation
   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 purple 'Add Trips' button to enter transportation

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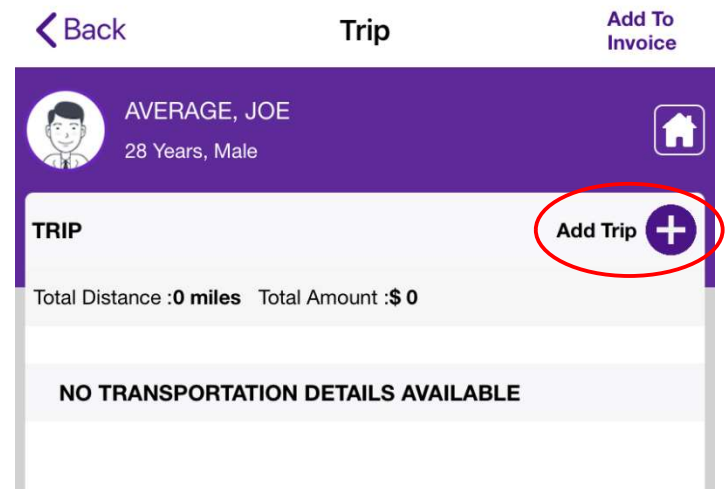
4. To add trip, select the purple plus sign (right-hand side of screen)
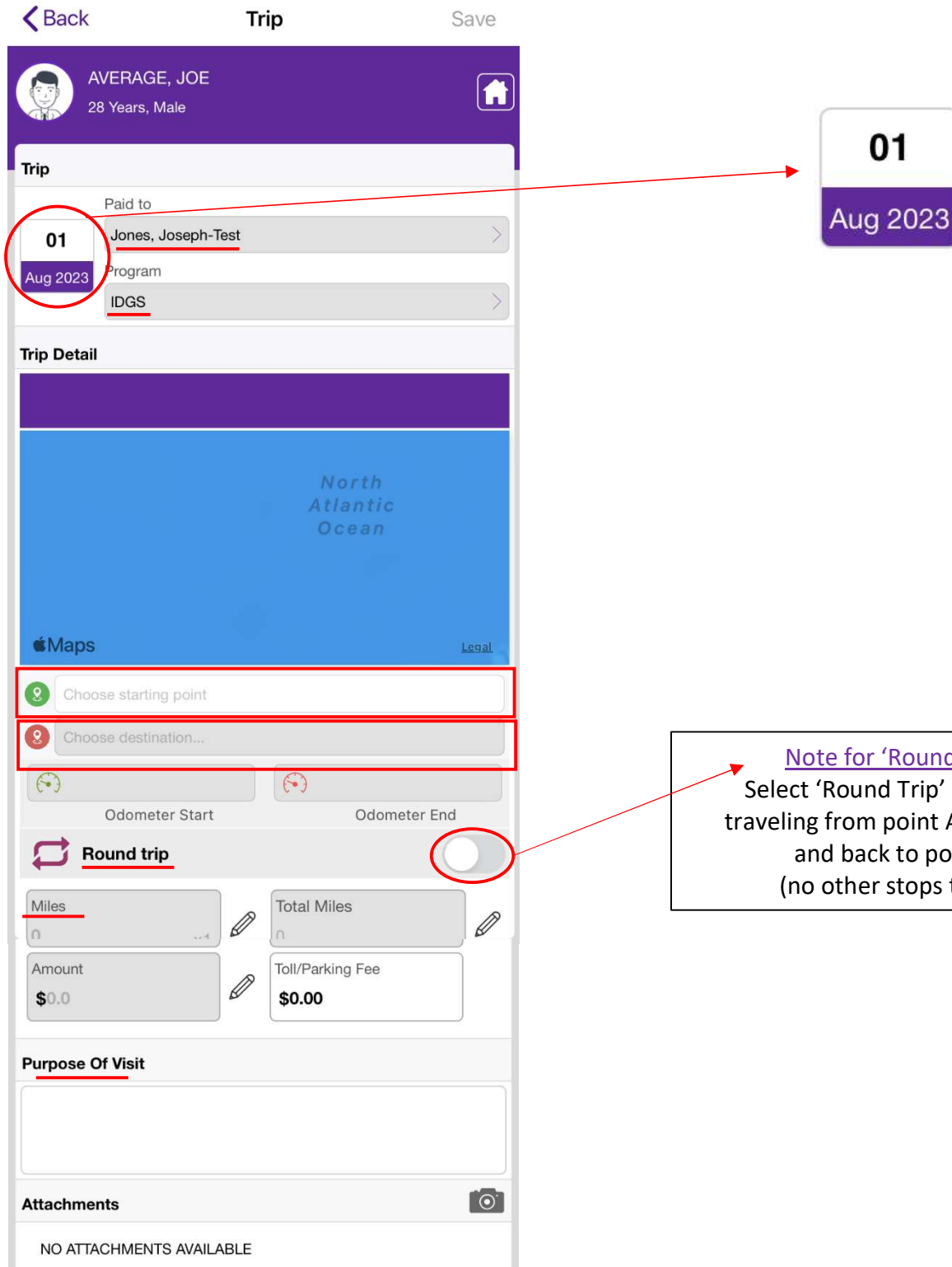
Trips Window:

5. Under 'Trip Detail' enter the following information:
   - o Date of Service (using the calendar icon to select appropriate date of service)
   - o Starting Point/Destination ('Start' indicated by a green icon; 'Stop' indicated by a red icon)
   - o Roundtrip
     - only for traveling from point A to point B and back to point A (no other stops taken)
   - o Miles
   - o Purpose of Visit
   - o Paid To: (auto-populates to the person selected for reimbursement)
   - o Amount* (auto-populates when miles are entered)
     Please Note: Odometer reading is not required for mileage entry
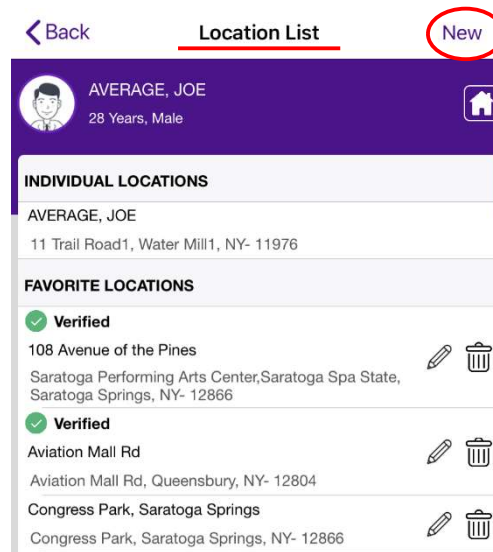
Note for 'Round Trip'
Select 'Round Trip' if you are traveling from point A to point B and back to point A (no other stops taken)
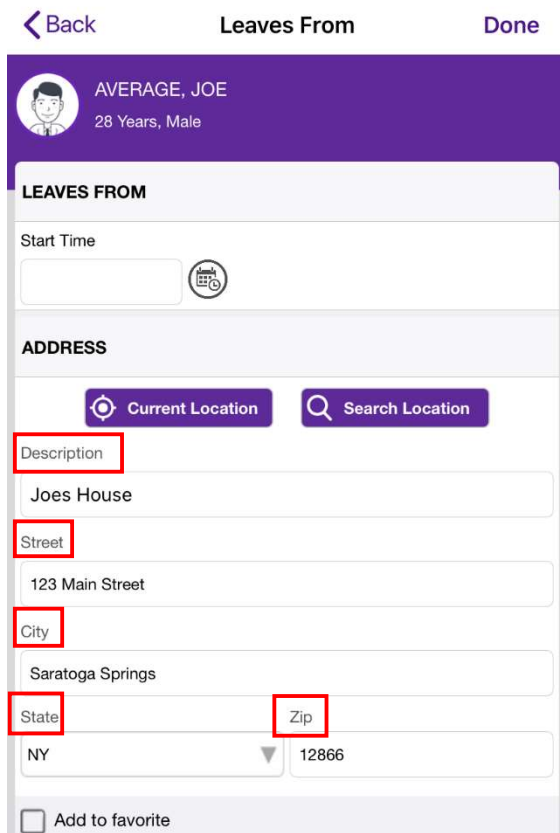
6. Locations List will populate with any favorited locations (user can edit or delete by swiping left on locations box)
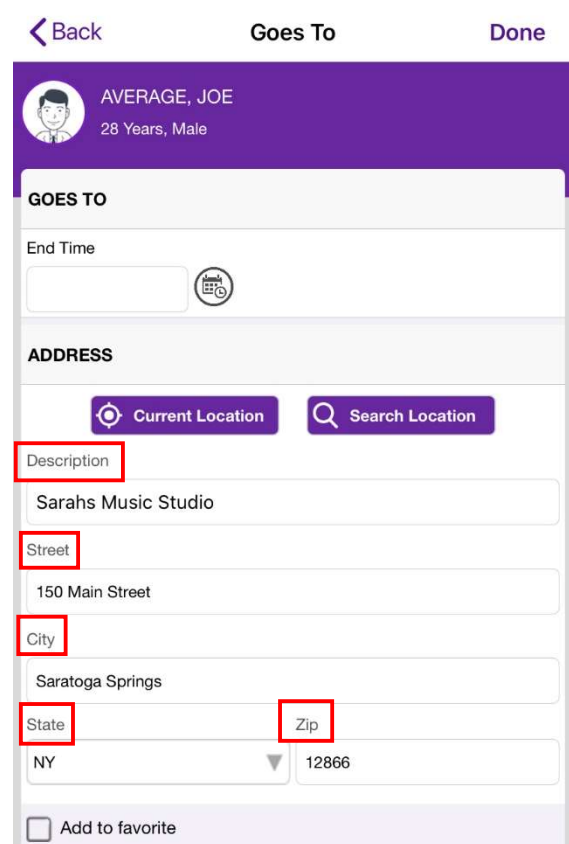7. Select 'New' to enter new location

8. Enter the following information for 'Leaves From' and 'Goes To'
   o Description
   o Street
   o City
   o State
   o Zip
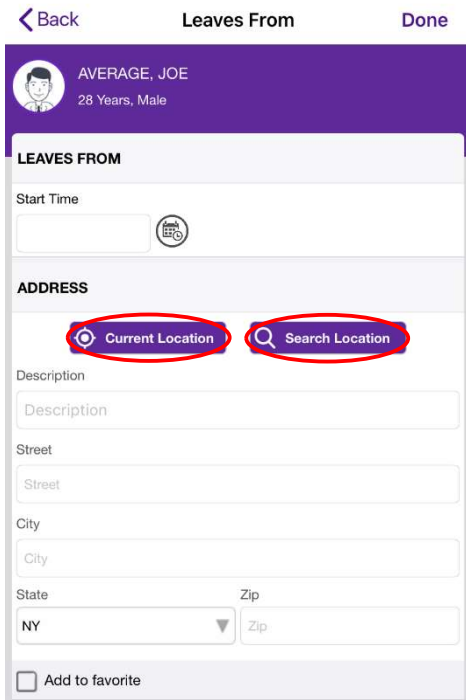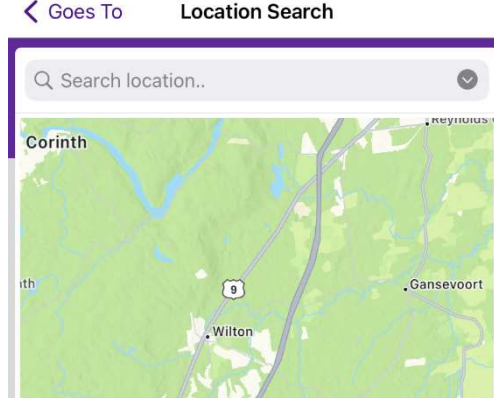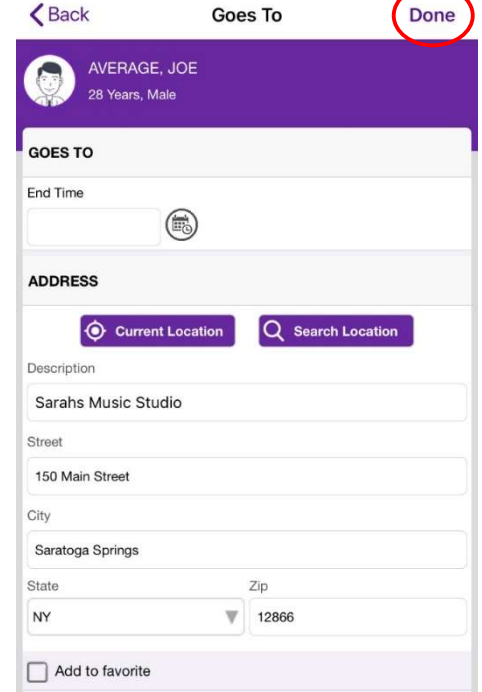   **Please Note: Start/Stop Times are not required for mileage entry**

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 <u>frequented addresses</u> 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

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)

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)
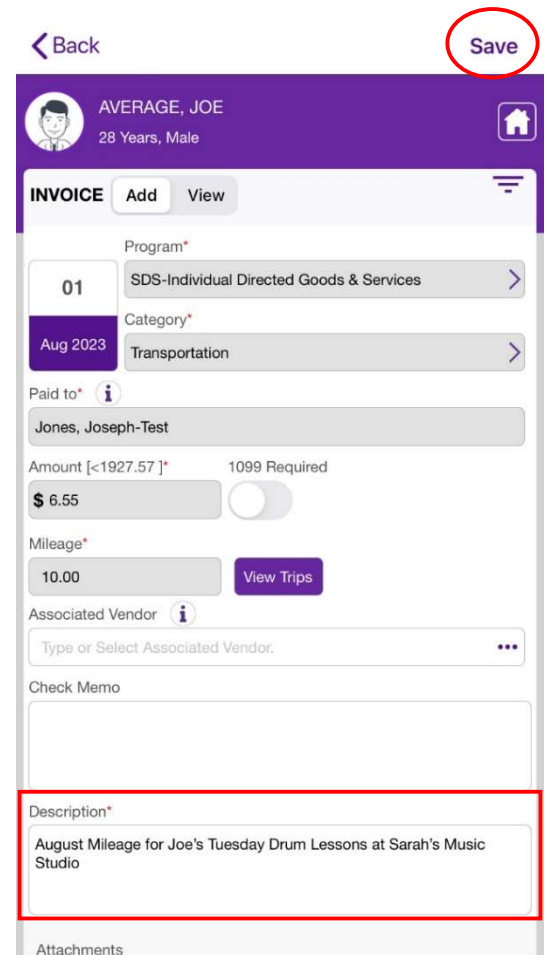
- To edit 'Trip Details': select purple arrow on specific trip ⟶ ＞

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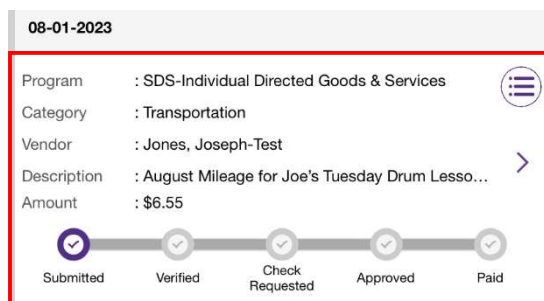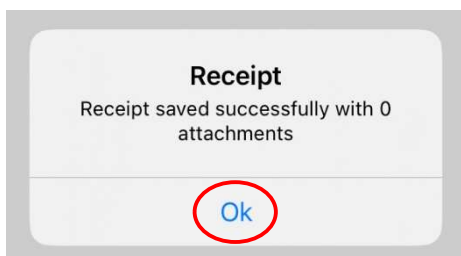
- To delete: select purple dropdown icon on specific invoice; select 'Delete Invoice' to permanently delete

- To edit: select purple arrow on specific invoice

eVeroPortal Website
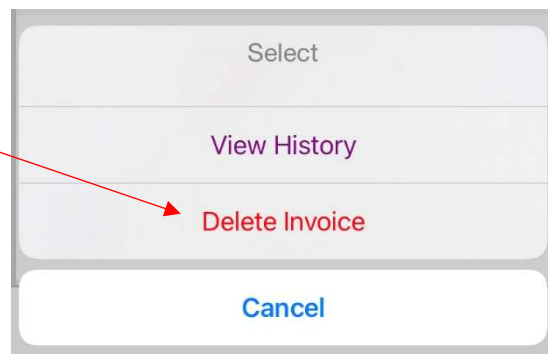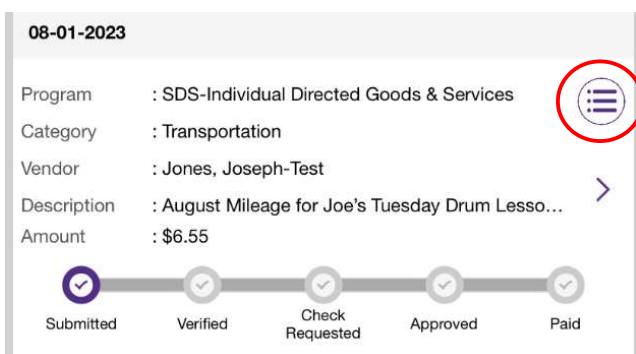
Entering Transportation

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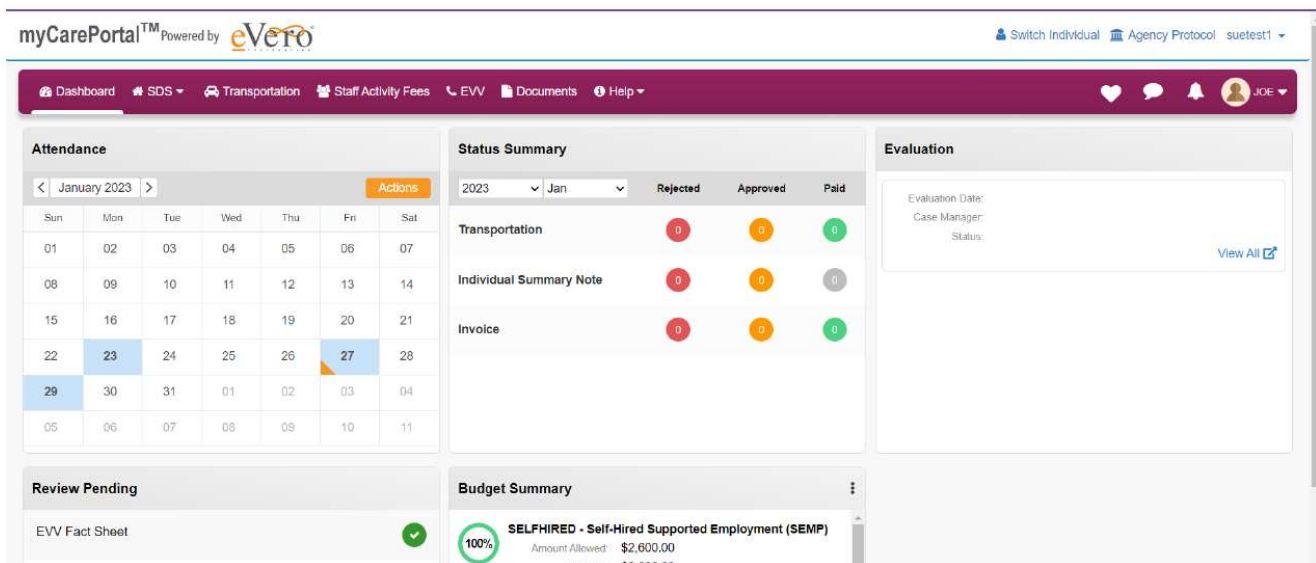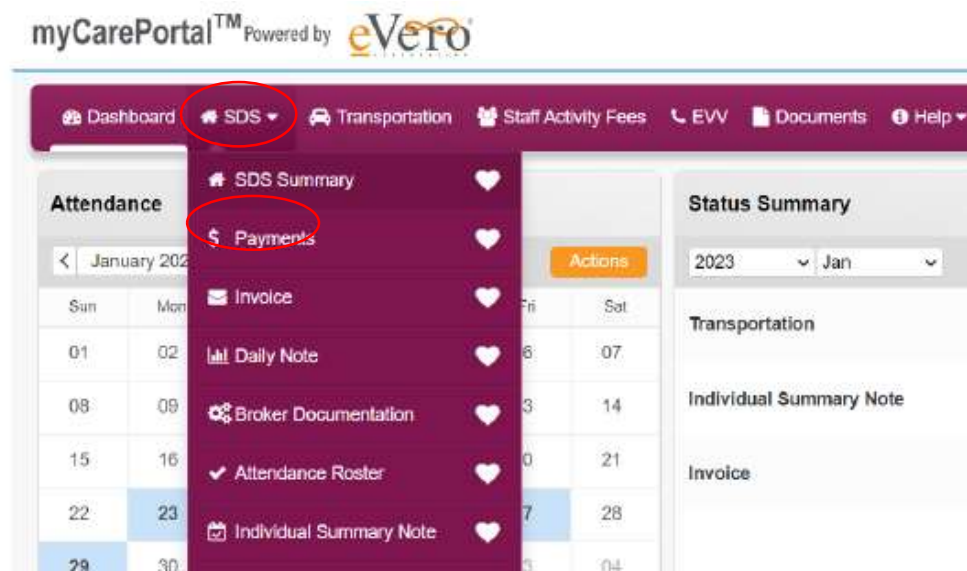
Forgotten User/Password:
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

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

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

Entering Transportation
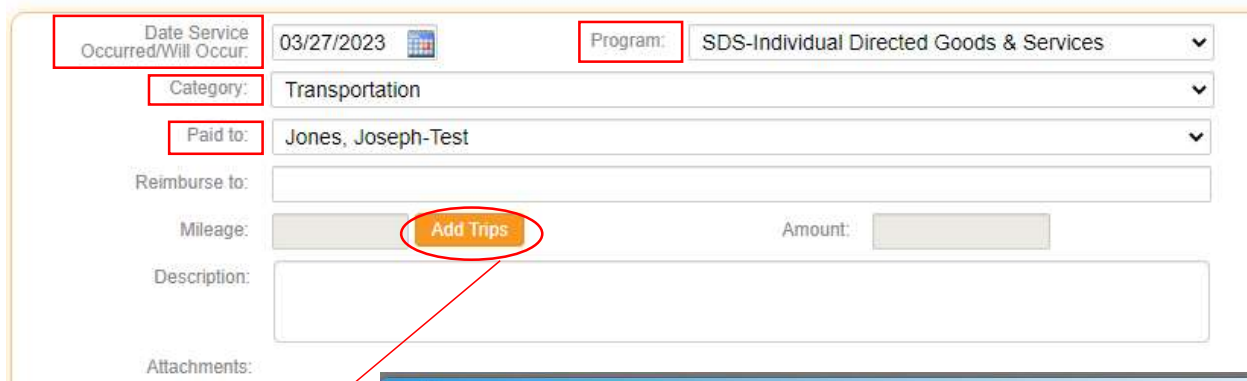(mileage is entered directly on the eVeroPortal Website)

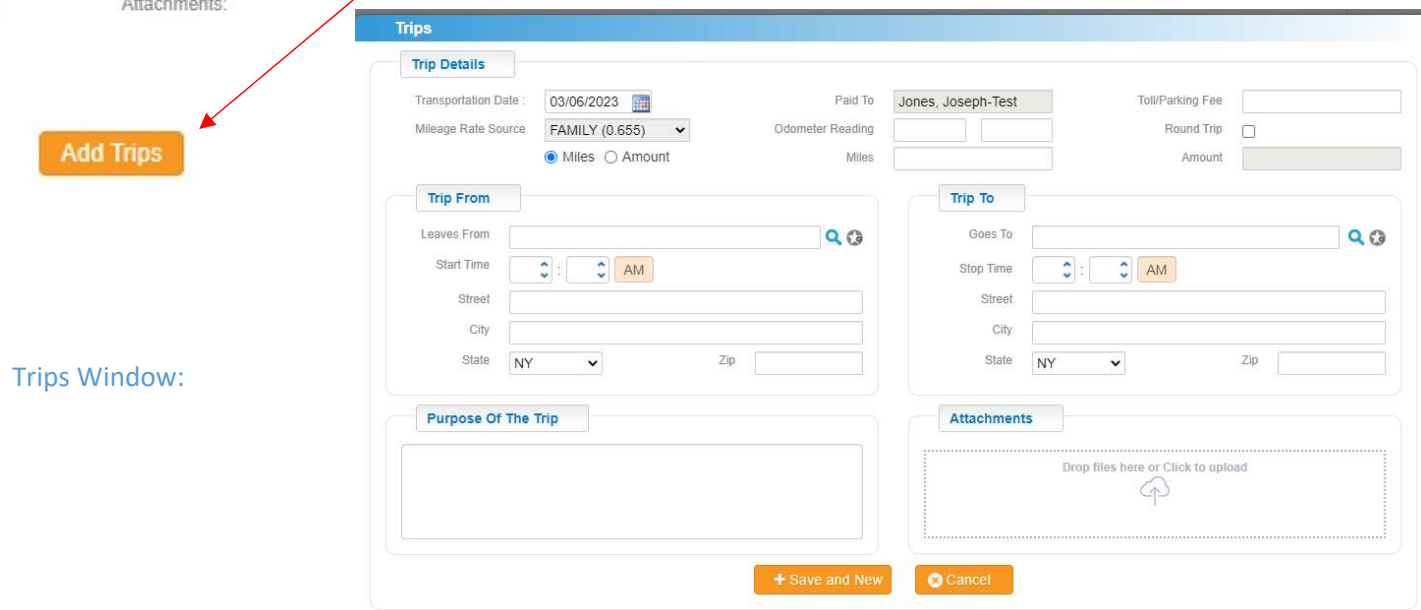1. Select the 'Orange Plus Sign' (top right-hand corner) under 'Invoice List'
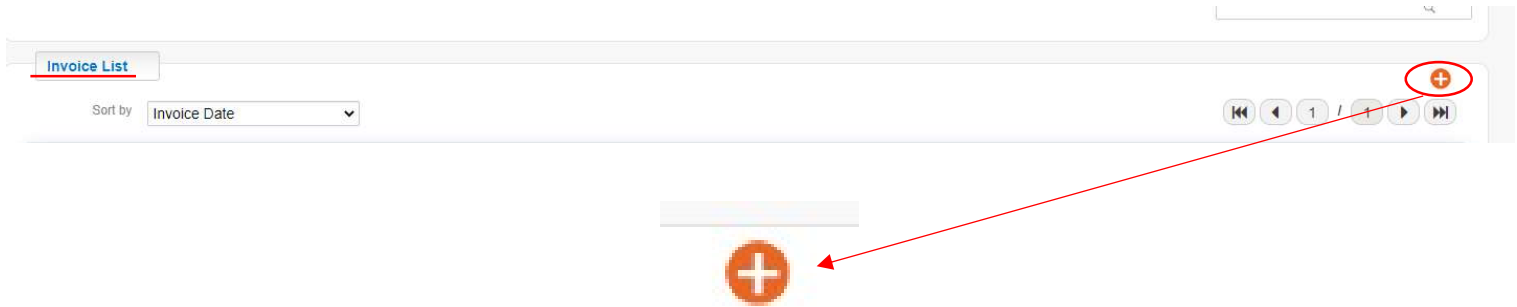
Invoice List

Sort by Invoice Date ▼

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)

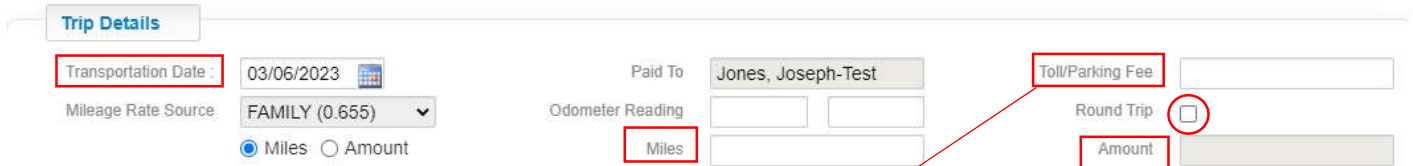3. Select orange 'Add Trips' button to enter transportation

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

Category: Transportation ▼

Paid to: Jones, Joseph-Test ▼

Reimburse to:

Mileage: Add Trips   Amount:

Description:

Attachments:

Add Trips

Trips Window:

Trips

Trip Details

Transportation Date : 03/06/2023   Paid To Jones, Joseph-Test   Toll/Parking Fee

Mileage Rate Source FAMILY (0.655) ▼   Odometer Reading   Round Trip ☐

● Miles ○ Amount   Miles   Amount

Trip From   **Trip To**

Leaves From   Goes To

Start Time   :   AM   Stop Time   :   AM

Street   Street

City   City

State NY ▼   Zip   State NY ▼   Zip

Purpose Of The Trip   **Attachments**

Drop files here or Click to upload

+ Save and New   ⊗ Cancel

Details of Trip Window:

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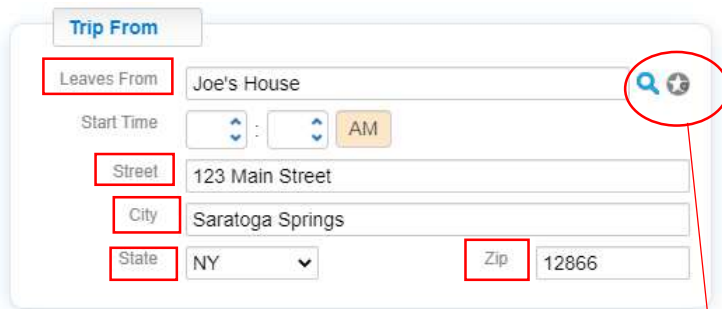   o Amount* (auto-populates when miles are entered)

Trip Details

Transportation Date :	03/06/2023	Paid To	Jones, Joseph-Test	Toll/Parking Fee
Mileage Rate Source	FAMILY (0.655)	Odometer Reading		Round Trip ☐
	⦿ Miles ○ Amount	Miles		Amount

   o <u>Toll/Parking Fee</u> entered in the following field (must have associated attachments for reimbursement)
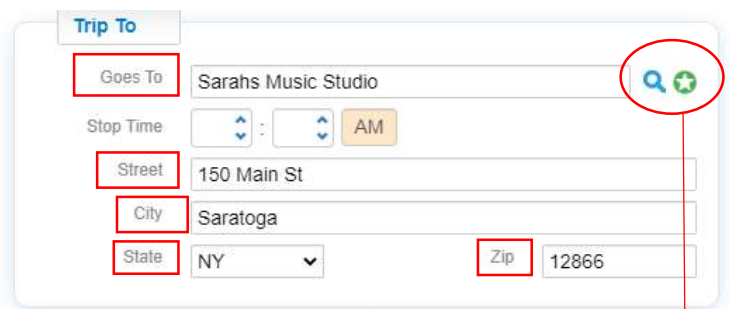
   <u>Toll/Parking Fee</u> [   ]

5. Enter the following information for 'Trip From' and 'Trip To'
   o Leaves From/Goes To
   o Street
   o City
   o State
   o Zip

Trip From

Leaves From	Joe's House 🔍 ⭐
Start Time	[ ] : [ ] AM
Street	123 Main Street
City	Saratoga Springs
State	NY Zip 12866

Trip To

Goes To	Sarahs Music Studio 🔍 ⭐
Stop Time	[ ] : [ ] AM
Street	150 Main St
City	Saratoga
State	NY Zip 12866

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	
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

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

18. Saved invoices will populate as 'Submitted'

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