

# Other Than Personal Services (OTPS) Reimbursement Steps

## eVeroPortal App and Website

1. Log into eVeroPortal
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

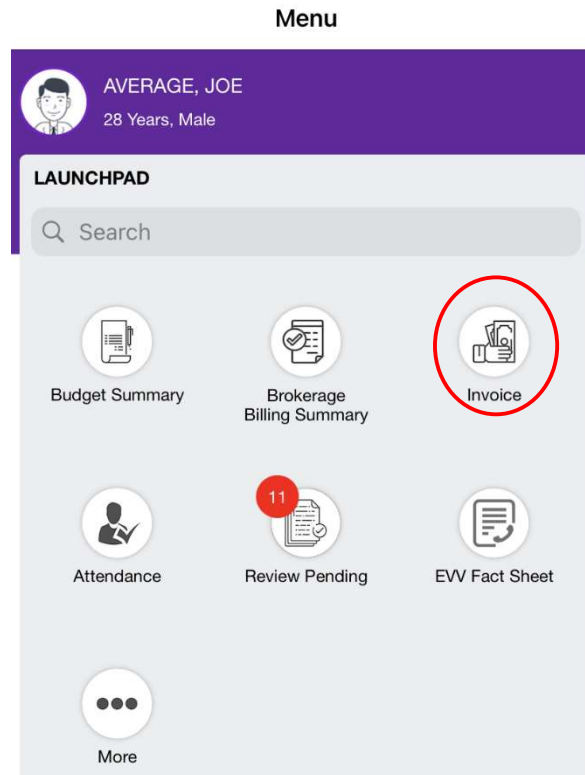
The login screen for eVero Corporation features the company logo at the top. Below it, the text "Sign in to continue" is circled in red. The form includes fields for "Username" and "Password", each with a "Forgot your [username/password]?" link to its right. A large orange "Sign In" button is at the bottom, with a "Forgot your login information?" link below it. Blue arrows point from the text box on the left to the "Forgot your username?", "Forgot your password?", and "Sign In" elements.

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

The dashboard screen for "AVERAGE, JOE" includes a "Close" button in the top right. The "Budget Summary" section shows a total budget of \$133810.00 and a remaining balance of \$133810.00. The "Rejections" section, highlighted with a red box, lists: Transportation (0), Individual Summary Note (0), and Invoice (1). The "Review Pending" section is below it. The "Paid" section, also highlighted with a red box, lists: Transportation (0) and Invoice (0). Red arrows point from the list item in step 3 to the "Rejections" and "Paid" sections.

Dashboard		Close									
AVERAGE, JOE											
<b>Budget Summary</b> Total Budget Amount: <b>\$133810.00</b> Spent Year to Date: <b>\$0.00</b> Remaining Balance: <b>\$133810.00</b>											
<b>Rejections</b> <table border="1"> <tr> <td>Transportation</td> <td>0</td> <td>&gt;</td> </tr> <tr> <td>Individual Summary Note</td> <td>0</td> <td>&gt;</td> </tr> <tr> <td>Invoice</td> <td>1</td> <td>&gt;</td> </tr> </table>			Transportation	0	>	Individual Summary Note	0	>	Invoice	1	>
Transportation	0	>									
Individual Summary Note	0	>									
Invoice	1	>									
<b>Review Pending</b>											
<b>Paid</b> <table border="1"> <tr> <td>Transportation</td> <td>0</td> <td>&gt;</td> </tr> <tr> <td>Invoice</td> <td>0</td> <td>&gt;</td> </tr> </table>			Transportation	0	>	Invoice	0	>			
Transportation	0	>									
Invoice	0	>									

4. Select 'Invoice' icon on the Menu Launchpad



5. Select 'Add' to enter reimbursement request

[< Back](#) [Save](#)

The screenshot shows the 'INVOICE' form for 'AVERAGE, JOE' (28 Years, Male). The 'Add' button is circled in red. The form includes a 'Program\*' dropdown (01), a 'Category\*' dropdown (Sep 2023), a 'Paid to\*' dropdown (with an information icon), and an 'Amount\*' field (with a '\$' symbol and a '1099 Required' toggle). A home icon is visible in the top right corner.

## Entering Personal Use 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 OTPS Transportation
  - Date of Service (if entering multiple dates use last date of service)
  - Program: Other Than Personal Services (OTPS)
  - Category: Personal Use Transportation
  - Paid To: (person requesting reimbursement)
3. Select purple 'Add Trips' button to enter transportation

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

Trips Window:

## 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**

[< Back](#)
Trip
Save

Home icon

**Trip**

Paid to: 01 Jones, Joseph-Test

Program: OTPS

**Trip Detail**

North Atlantic Ocean

South Atlantic Ocean

Apple Maps Legal

📍 Choose starting point

📍 Choose destination...

Odometer Start

Odometer End

**Round trip**

☒

Miles 0 x1

Amount \$0.0

Total Miles 0

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

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**

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

← Back Leaves From Done

AVERAGE, JOE  
28 Years, Male

**LEAVES FROM**

Start Time

**ADDRESS**

Current Location Search Location

Description

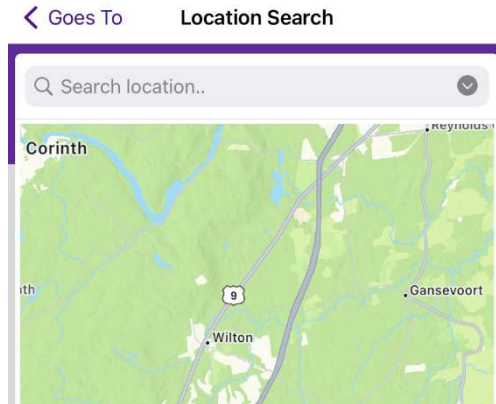
Street

City

State Zip

NY

☐ Add to favorite



← Back Goes To Done

AVERAGE, JOE  
28 Years, Male

**ADDRESS**

Current Location Search Location

Description

Saratoga Performing Arts Center,Saratoga Spa State

Street

108 Avenue of the Pines

City

Saratoga Springs

State Zip

NY 12866

☐ Add to favorite



**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

✓ Verified

108 Avenue of the Pines


Saratoga Performing Arts Center,Saratoga Spa State,  
Saratoga Springs, NY- 12866

☒ Add to favorite


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

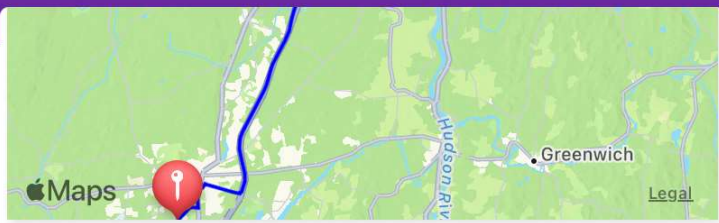
[< Back](#)
Trip
Save



AVERAGE, JOE



28 Years, Male






123 Main St

Saratoga Performing Arts Center, Saratoga Spa State S...

Odometer Start

Odometer End

 **Round trip**

☒

Miles 28.37 x2

Amount **\$37.16**

Total Miles **56.74**


Toll/Parking Fee **\$0.00**

**Purpose Of Visit**

Concert at SPAC

**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)

Miles <span style="color: red; font-weight: bold;">28.37</span> x2	Total Miles 56.74
Amount <b>\$37.16</b>	Toll/Parking Fee <b>\$0.00</b>

**Purpose Of Visit**

Concert at SPAC

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

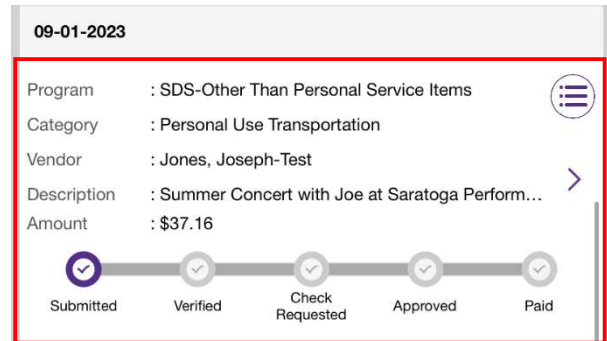
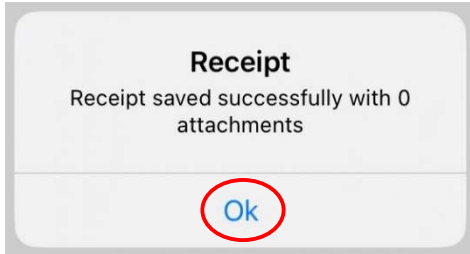
20. Enter the invoice description (invoice will indicate mileage entered and reimbursement amount)

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

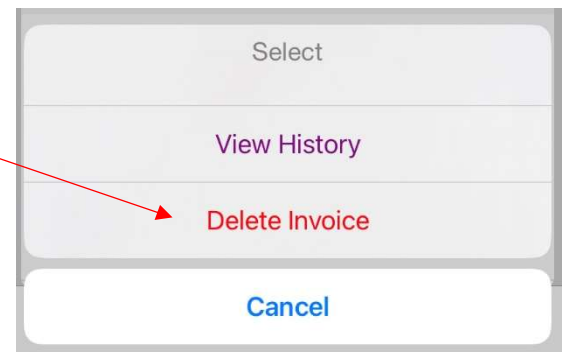
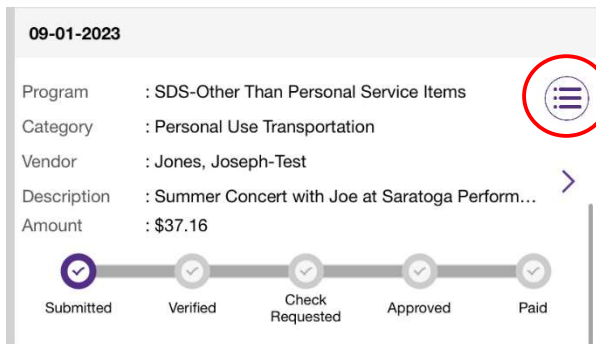


22. Attention screen will indicate mileage was saved successfully; Select 'OK'

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



# eVeroPortal Website

## Entering Personal Use Transportation

(mileage entered directly on the eVero MyCarePortal)

1. Log into eVeroPortal at [signin.evero.com](https://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

Sign in to continue

Username [Forgot your username?](#)

Password [Forgot your password?](#)

[Sign In](#)

[Forgot your login information?](#)

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

Attendance						
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			
	Rejected	Approved	Paid
Transportation	0	0	0
Individual Summary Note	0	0	0
Invoice	0	0	0

**Budget Summary**

100% SELFHIRED - Self-Hired Supported Employment (SEMP)

Amount Allowed: \$2,600.00

Balance: \$2,600.00

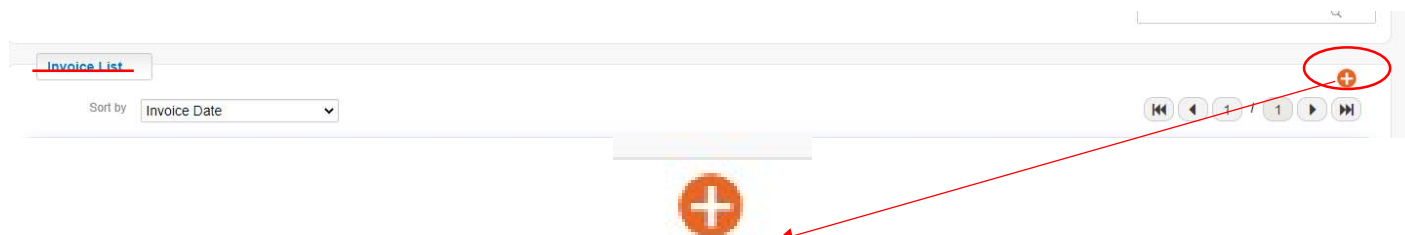
4. Select 'SDS' Dropdown
5. Select 'Invoice' to enter reimbursement request

myCarePortal™ Powered by eVero

Dashboard **SDS** Transportation Staff Activity Fees EVV

- SDS Summary
- Payments
- Invoice**
- Daily Note
- Broker Documentation
- Attendance Roster
- Individual Summary Note
- Response To Service
- Yearly Expenditure

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



7. Enter the following information for OTPS Personal Use Transportation
- Date of Service (if entering multiple dates use last date of service)
  - Program: Other Than Personal Services (OTPS)
  - Category: Transportation
  - Paid To: (person requesting reimbursement)

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

**Date Service Occurred/Will Occur:** 03/31/2023 **Program:** SDS-Other Than Personal Service Items

**Category:** Personal Use Transportation

**Paid to:** Jones, Joseph-Test

Reimburse to:

Mileage: **Add Trips** Amount:

Description:

Attachments:

**Add Trips**

**Trips Window:**

**Trip Details**

Transportation Date: 03/03/2023

Mileage Rate Source: FAMILY (0.655)

☒ Miles ☐ Amount

Paid To: Jones, Joseph-Test

Odometer Reading:   Miles:

Toll/Parking Fee:

Round Trip: ☐

Amount:

**Trip From**

Leaves From:

Start Time:  :  AM

Street:

City:

State: NY Zip:

**Trip To**

Goes To:

Stop Time:  :  AM

Street:

City:

State: NY Zip:

**Purpose Of The Trip**

**Attachments**

Drop files here or Click to upload

## Details of Trip Window:

9. Under 'Trip Details' enter the following information:

- Date of Service
- Miles
- Roundtrip
- Paid To: (auto-populates to the person selected for reimbursement)
- Amount\* (auto-populates when miles are entered)

The screenshot shows the 'Trip Details' form. Red boxes highlight the following fields: 'Transportation Date' (03/06/2023), 'Mileage Rate Source' (FAMILY (0.655)), 'Paid To' (Jones, Joseph-Test), 'Miles' (input field), 'Toll/Parking Fee' (input field), and 'Round Trip' (checkbox).

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

Toll/Parking Fee

10. 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. Red boxes highlight the following fields: '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. Red boxes highlight the following fields: 'Goes To' (Congress Park), 'Stop Time' (AM), 'Street' (268 Broadway), 'City' (Saratoga Springs), 'State' (NY), and 'Zip' (12866). A red circle highlights the search and star icons on the right side of the 'Goes To' field.

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



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



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



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

**Favorite Address**

Favorite Address

Name	Street	City	State	Zip	
<a href="#">11 Trail Road1</a>	11 Trail Road1	Water Mill1	NEW YORK	11976	
<a href="#">Congress Park</a>	268 Broadway	Saratoga Springs	NEW YORK	12866	X
<a href="#">Joe's House</a>	123 Main Street	Saratoga Springs	NEW YORK	12866	X
<a href="#">4227 NY-50 Saratoga Springs, NY 12866</a>	4227 NY-50	Saratoga Springs	NEW YORK	12866	X
<a href="#">Proctors Theatre</a>	432 State Street	Schenectady	NEW YORK	12305	X
<a href="#">Sarabs Music Studio</a>	150 Main St	Saratoga	NEW YORK	12866	X

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

**Purpose Of The Trip**

Drove to Congress Park to meet up with friends and play some pick-up basketball as well as schedule future pick-up games for this spring

16. Enter any attachments necessary for reimbursement

**Attachments**

Drop files here or Click to upload

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

+ Save and New

18. Saved trips will populate under 'Trip List'

**Trip List**

Transportation Date	Miles	Amount	Toll/Parking Fee	Trip From	Trip To	Purpose of the trip
03/03/2023	10	\$6.55	\$0.00	Joe's House	Stop and Shop	Drove to Stop and Shop to grocery shop and work on money management
03/31/2023	10	\$6.55	\$0.00	Joe's House	Congress Park	Drove to Congress Park to meet up with friends and play some pick-up basketball

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



20. Mileage and Amount will auto-populate once all trips are completed and saved

21. Enter a description of the transportation submission

Date Service Occurred/Will Occur: 03/31/2023 Program: SDS-Other Than Personal Service Items

Category: Personal Use Transportation

Paid to: Jones, Joseph-Test

Reimburse to:

Mileage: 70 Amount: \$45.85

Description: March Personal Use Transportation in the Community

Attachments:

22. 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:

Save Cancel

Budget effective date : 01/01/2023

23. Saved invoices will populate as 'Submitted'

Date Service Occurred/Will Occur: 03/31/2023 Program: SDS-Other Than Personal Service Items

Category: Personal Use Transportation

Paid to: Jones, Joseph-Test

Reimburse to:

Mileage: 70 [View Trips](#) Amount: \$45.85

Description: March Personal Use Transportation in the Community

Attachments:

Submitted Verified Check Requested Approved Paid

1099 Required: ☐

Check Memo:

[View History](#)

Budget effective date : 04/01/2023

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

[View History](#)

Budget effective date : 01/01/2023