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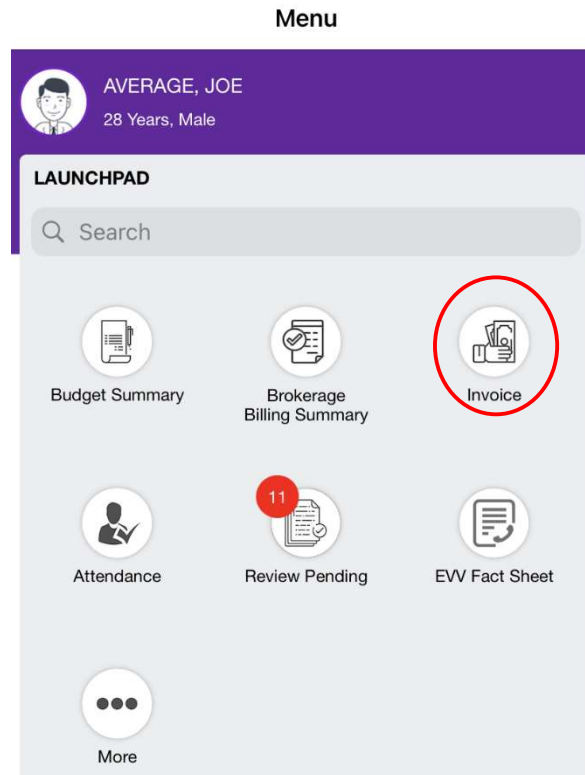
3. eVeroPortal App user can review 'Dashboard' screen for Invoice Status (Rejections or Paid section) upon login:

4. Select 'Invoice' icon on the Menu Launchpad

5. Select 'Add' to enter reimbursement request

Entering 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
   o Date of Service (if entering multiple dates use last date of service)
   o Program: Other Than Personal Services (OTPS)
   o Category: Personal Use Transportation
   o 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:

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

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
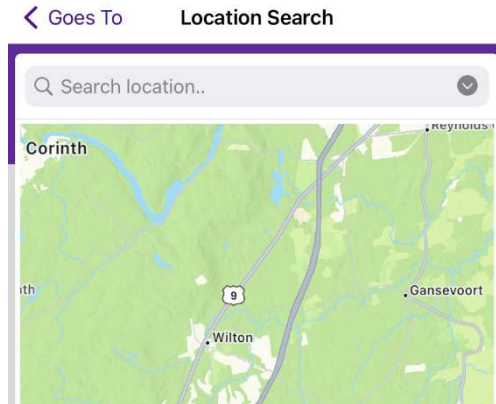
9. For 'Current Location' select 'Current Location' (upper left-hand side of screen)

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

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'
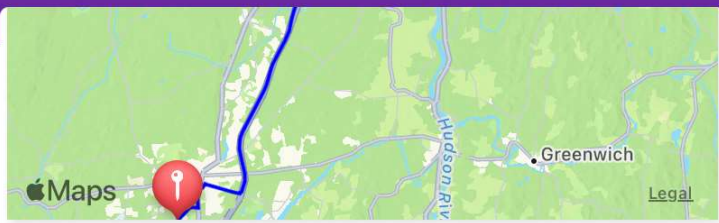
17. Select 'Save' to save mileage entry

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)

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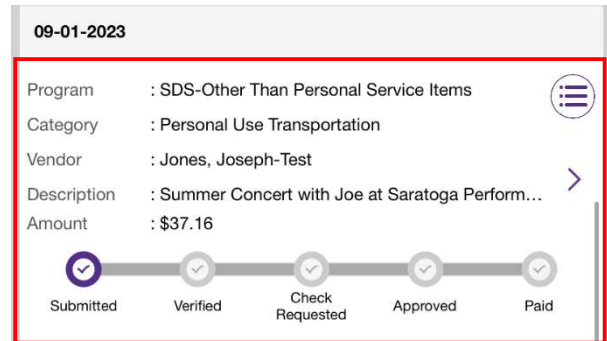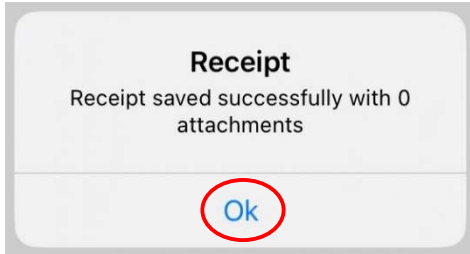
- To delete: select purple dropdown icon on specific invoice; select 'Delete Invoice' to permanently delete

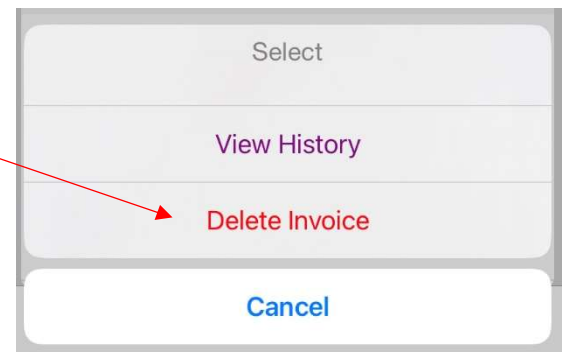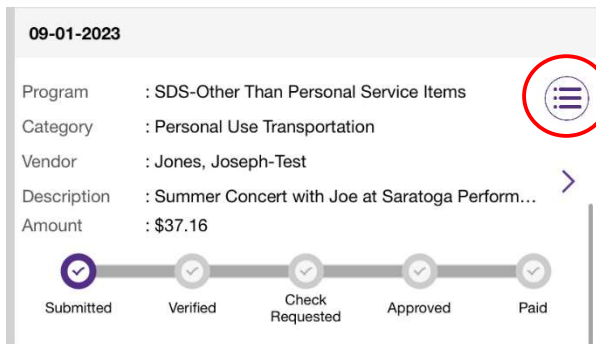- To edit: select purple arrow on specific invoice

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

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

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

6. Select the 'Orange Plus Sign' (top right-hand corner) under 'Invoice List'
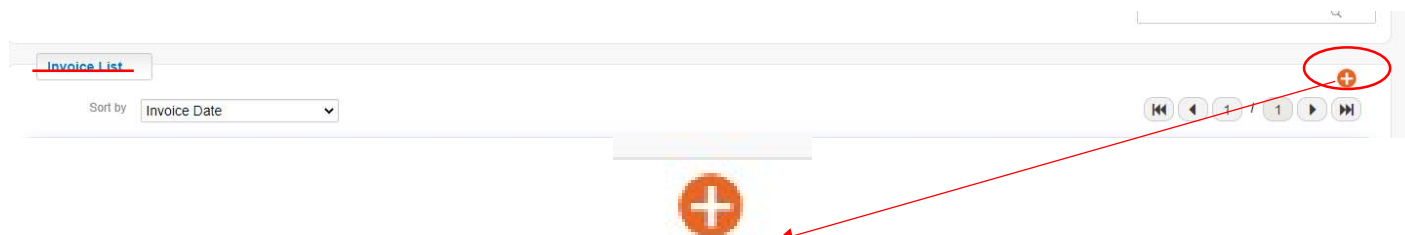
7. Enter the following information for OTPS Personal Use Transportation
    o   Date of Service (if entering multiple dates use last date of service)
    o   Program: Other Than Personal Services (OTPS)
    o   Category: Transportation
    o   Paid To: (person requesting reimbursement)

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

Trips Window:

9. Under 'Trip Details' enter the following information:
    - o Date of Service
    - o Miles
    - o Roundtrip
    - o Paid To: (auto-populates to the person selected for reimbursement)
    - o Amount* (auto-populates when miles are entered)

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

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

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	
11 Trail Road1	11 Trail Road1	Water Mill1	NEW YORK	11976	
Congress Park	268 Broadway	Saratoga Springs	NEW YORK	12866	❌
Joe's House	123 Main Street	Saratoga Springs	NEW YORK	12866	❌
4227 NY-50 Saratoga Springs, NY 128 66	4227 NY-50	Saratoga Springs	NEW YORK	12866	❌
Proctors Theatre	432 State Street	Schenectady	NEW YORK	12305	❌
Sarahs Music Studio	150 Main St	Saratoga	NEW YORK	12866	❌

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

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

23. Saved invoices will populate as 'Submitted'

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