Other Than Personal Services (OTPS) Transportation Reimbursement Steps

eVeroPortal App and Website

IDGS Transportation can be reimbursed for:

- Self-hired staff (Community Habilitation, Respite, or SEMP) when providing services
  - Staff must be clocked in
  - Participant must be present (in the vehicle) with staff
- When a self-directed person is independently traveling to a service, funded through:
  - IDGS budget
  - Direct Provider Purchased Community Habilitation
  - Direct Provider Purchased Respite
- When a family member is transporting the self-directed person to a service funded through:
  - IDGS budget
  - Direct Provider Purchased Community Habilitation
  - Direct Provider Purchased Respite

IDGS Transportation cannot be reimbursed for:

- Any transportation to a service/location that is not a funded service through IDGS categories
- If the cost of transportation is built into the billable rate for the service
  - Example: Direct Provider Purchase Group Day Hab supports

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

Other Than Personal Services (OTPS) Transportation Reimbursement Steps

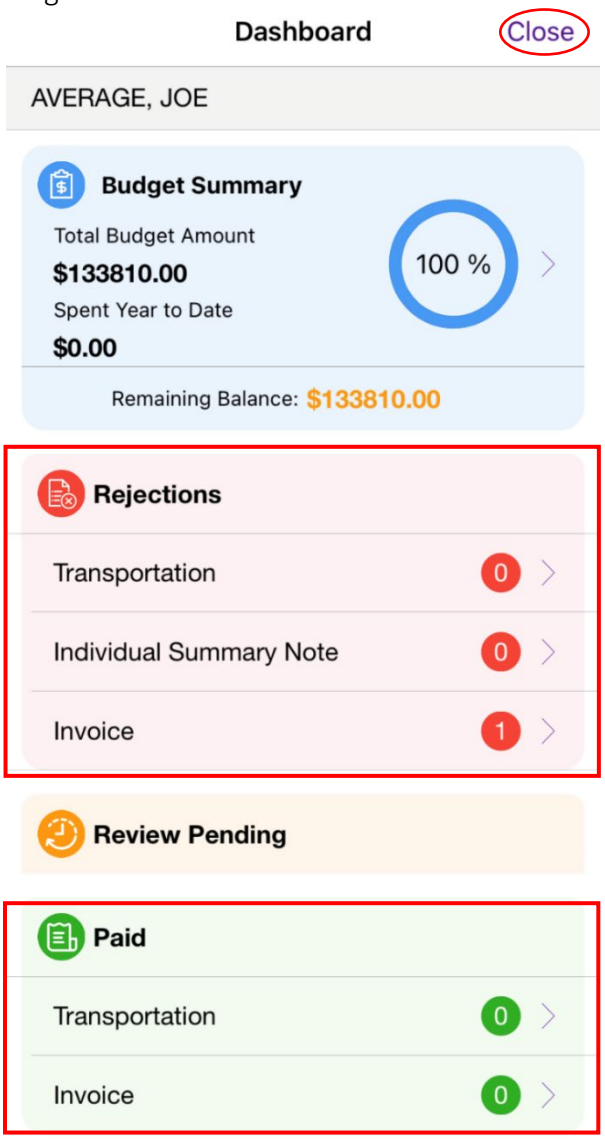
eVeroPortal App

1. Log into eVeroPortal
2. Select 'Sign In'



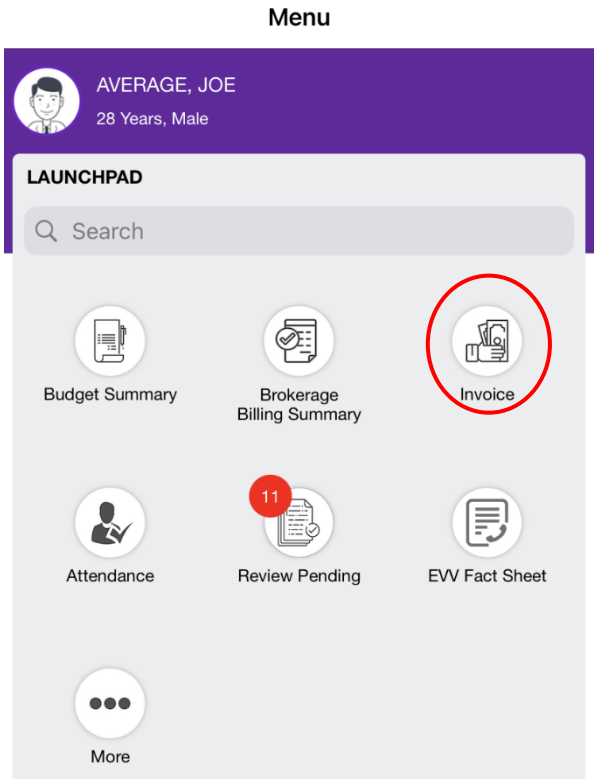
Forgotten User/Password:
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

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

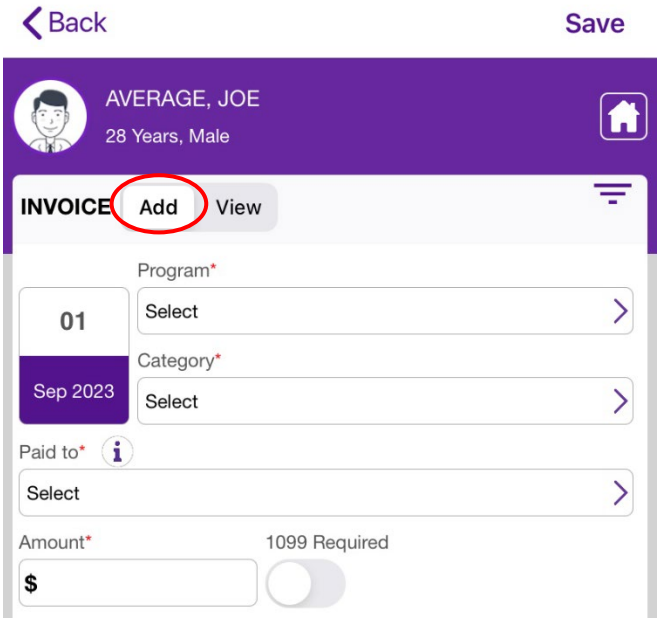


Dashboard Note: Select Close in the top right-side corner to access Menu Launchpad

4. Select ‘Invoice’ icon on the Menu Launchpad



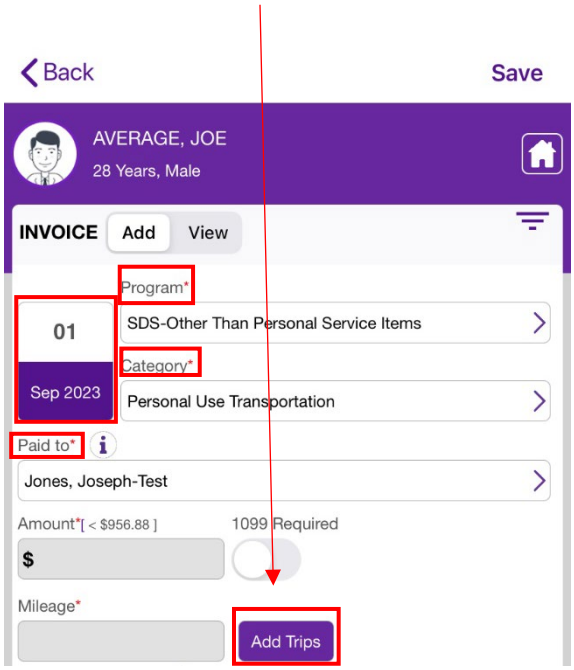
5. Select ‘Add’ to enter reimbursement request



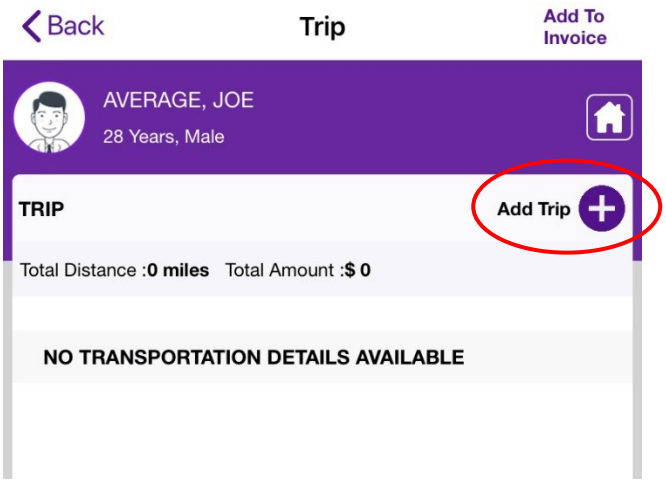
6. To add a new invoice, select invoice icon; select ‘Add’ invoice to submit reimbursement request

7. 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)

8. Select purple ‘Add Trips’ button to enter transportation

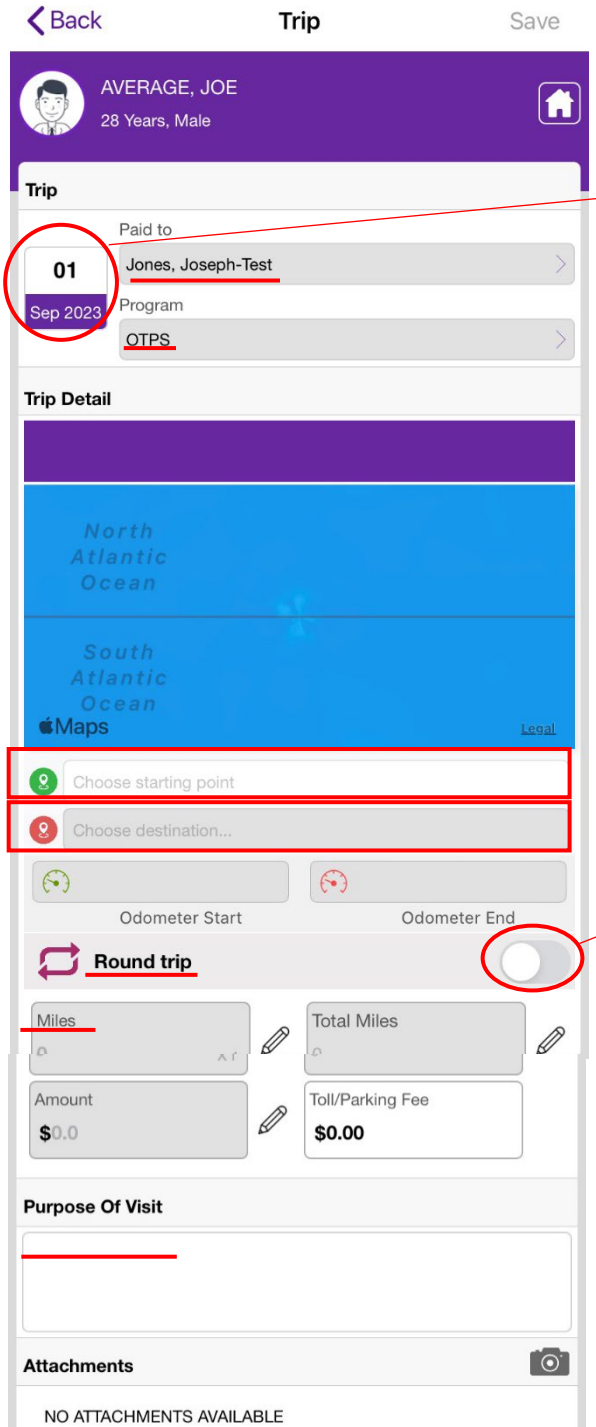


9. To add trip, select the purple plus sign (right-hand side of screen)



10. 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 is only used for traveling from point A to point B and back to point A (no other stops taken in between)
    - 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

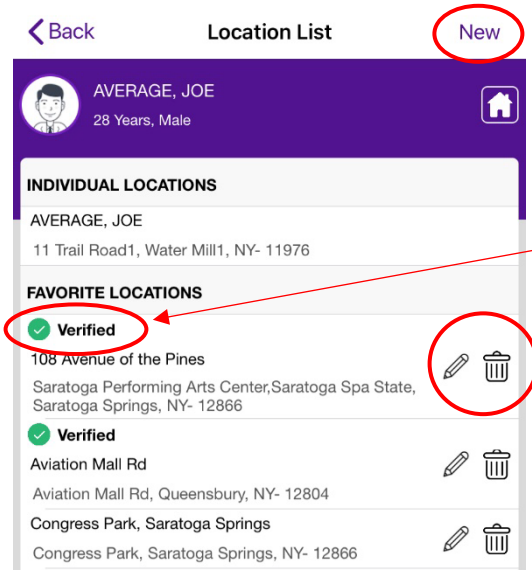




Entering Starting Point/Destination Note:
When entering addresses users will have an option to manually enter locations or select from a frequent locations list (customizable by user)

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

11. Select 'New' to enter new location or select from locations list

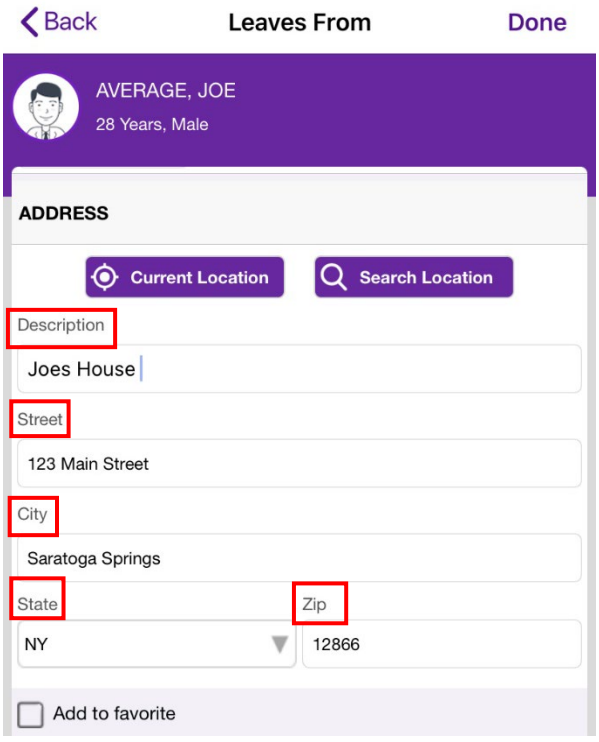


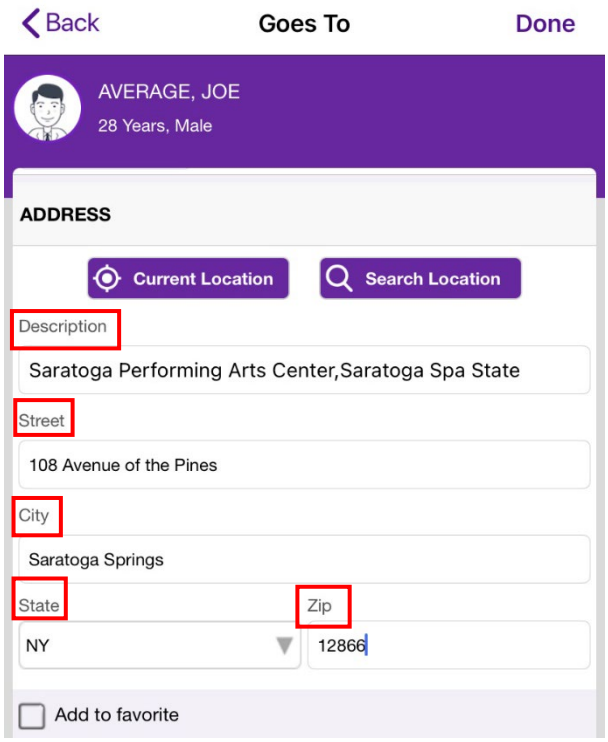
Locations List Note:

- Once user selects either starting point or destination a 'Locations List' will populate with favorited locations
- 'Verified' addresses indicate the location was captured with GPS confirmation through the app
- User can edit or delete by selecting the pencil icon or trashcan)

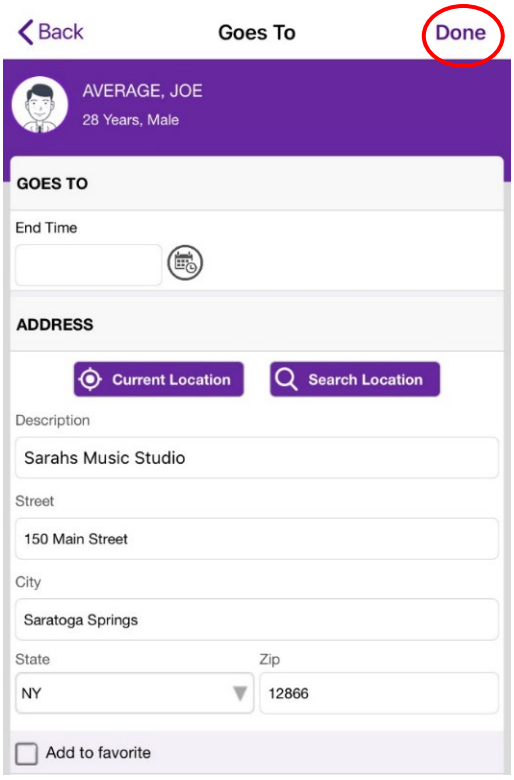
12. For new addresses, users will enter the following information for 'Leaves From' and 'Goes To'
    - Description
    - Street
    - City
    - State
    - Zip

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





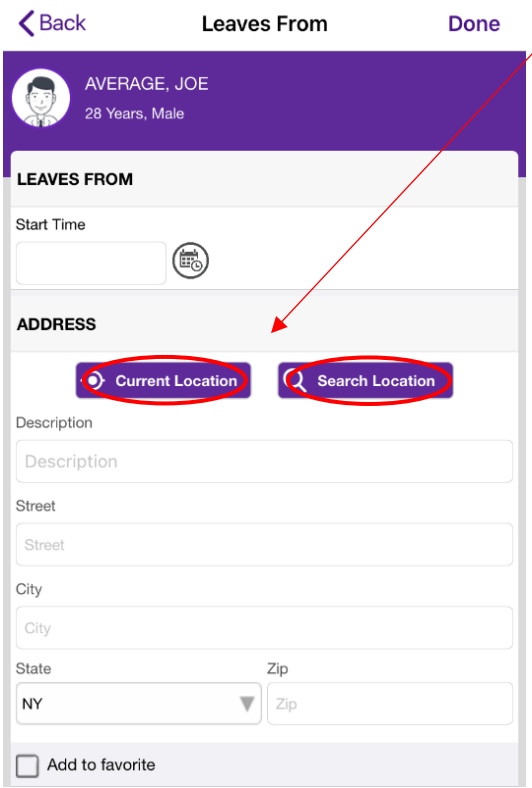
13. Select ‘Done’ to save address to individual trip entry

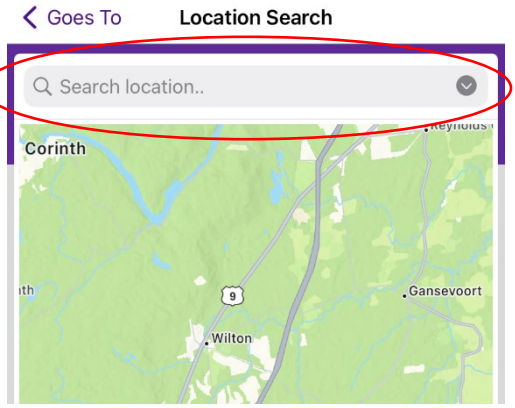


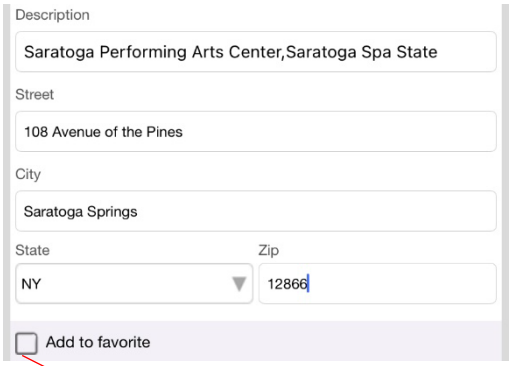
In-App Location Tools:

- To capture ‘Current Location’ users can select ‘Current Location’ (upper left-hand side of screen)
- To ‘Search Location’ users can select ‘Search Location’ (upper right-hand side of screen)

Note: if manually entered addresses are not populating as ‘Verified’ the in-app location tools will assist with appropriately capturing GPS information to accurately calculate trips

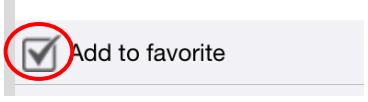






Add to Favorites-Locations List Note:

- To add frequented addresses to favorites on the App select ‘Add to Favorites’ (selection indicated by grey checkbox and will populate on locations list)



14. Verify number of miles traveled under ‘Miles’ and ‘Total Miles’

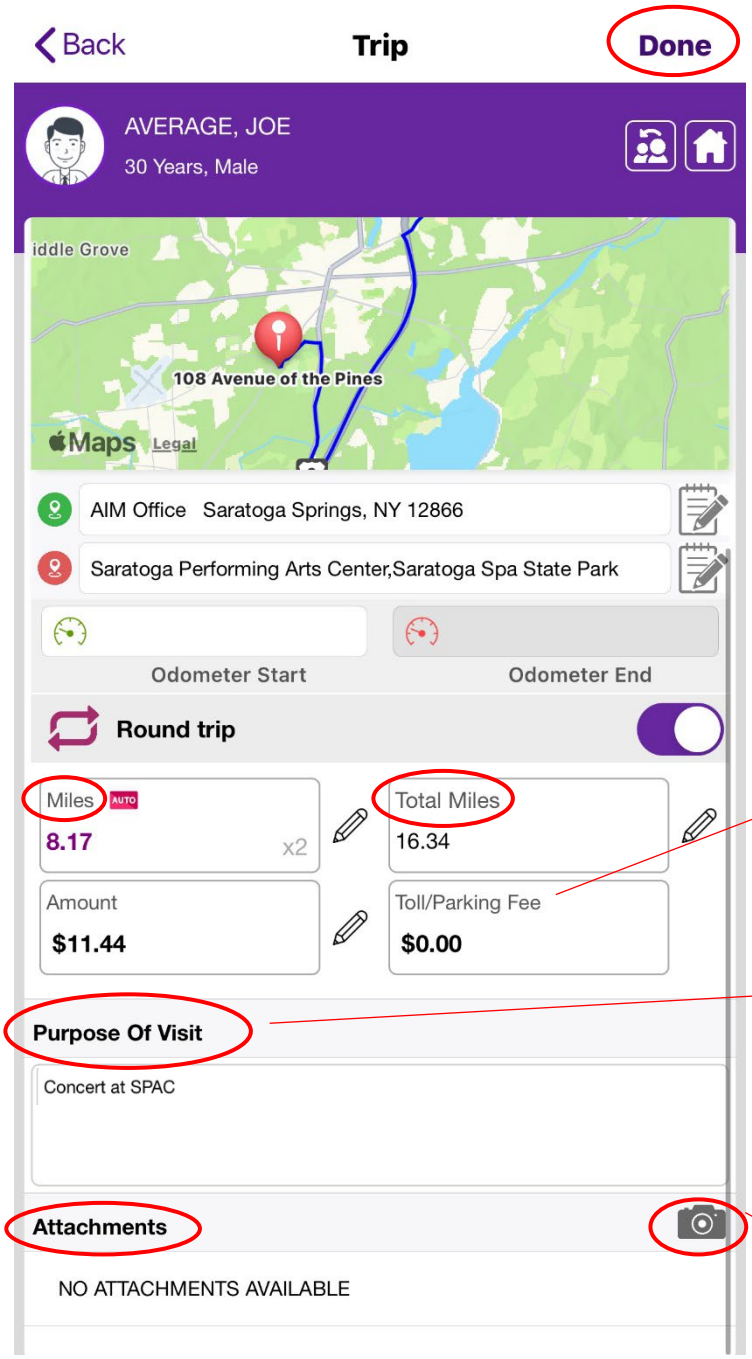
15. If miles are ‘Round Trip’ select ‘Round Trip’ (selection indicated by purple toggle)

16. Reimbursement amount will calculate under ‘Amount’

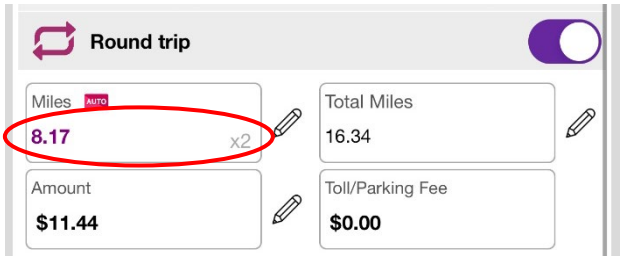
17. Enter note on visit under ‘Purpose of Visit’

18. If mileage requires attachments due to parking fees/tolls attach using the camera icon and select ‘From Camera’ ‘File’ or ‘From Photo Library’

19. Select ‘Done’ to save mileage entry

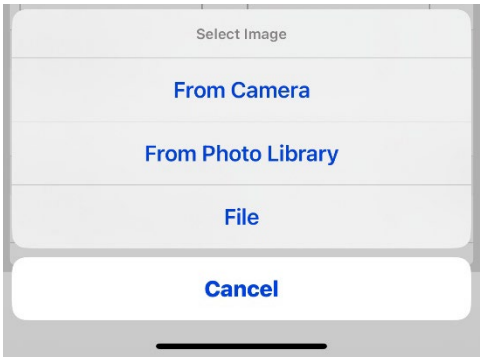


‘Round Trip’ Note:
Select ‘Round Trip’ if you are traveling from point A to point B and back to point A
(no other stops taken in between)

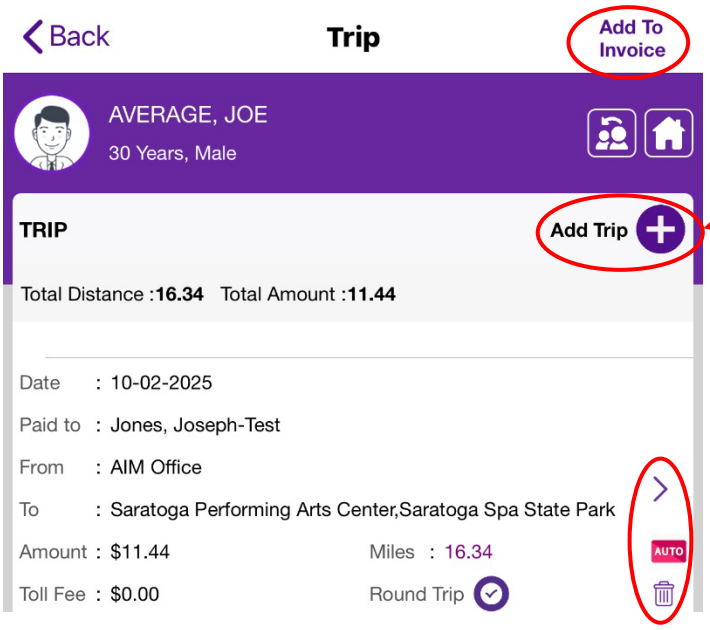


Toll-Parking Fees Note:
If mileage includes a toll this will be entered in this section (fees must have associated attachments included in trip entry for reimbursement)





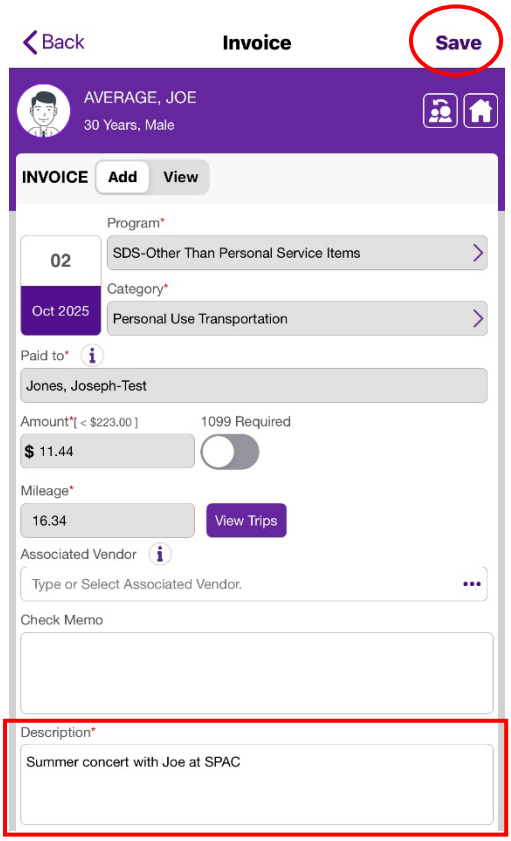
20. To save trips list entered select 'Add To Invoice' (purple button at the top right-hand side of screen)



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

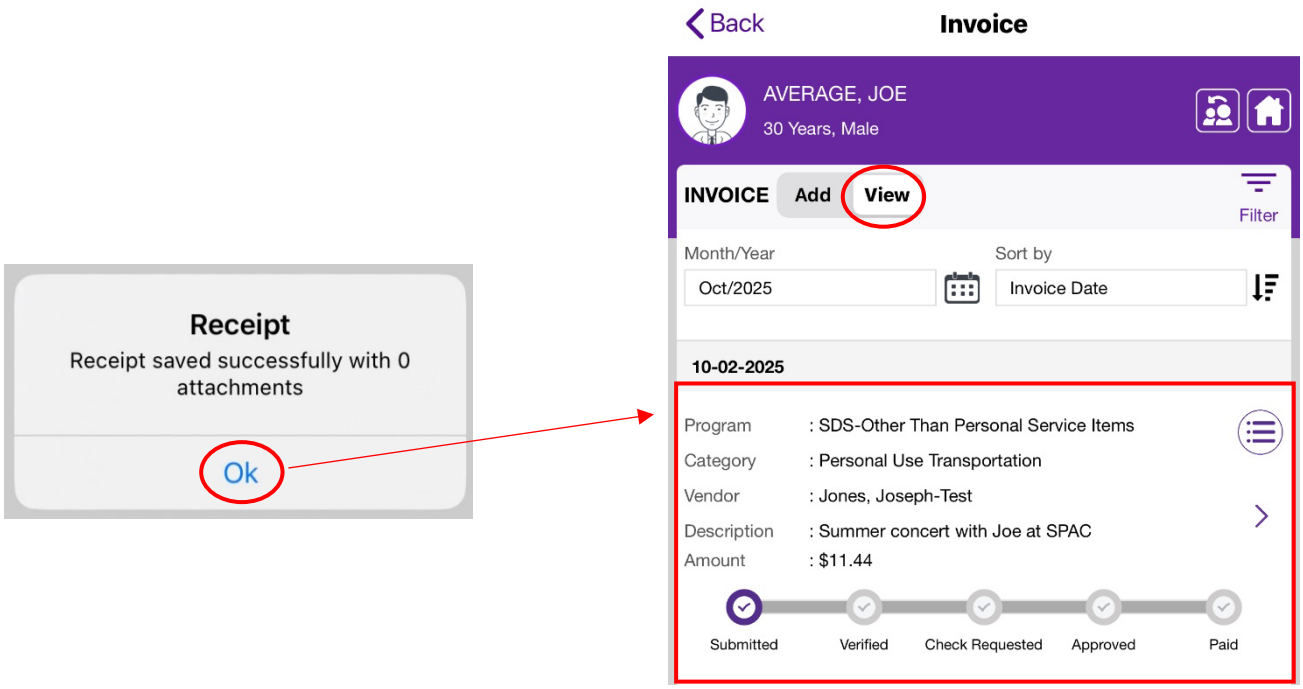
- To edit 'Trip Details': select purple arrow on specific trip 
- To delete 'Trip Details': select purple trashcan icon on specific trip; select 'Delete Invoice' to permanently delete 

22. Enter the invoice description (invoice will indicate mileage amount and reimbursement amount to be submitted)
23. Once all fields are entered select the purple 'Save' button (upper right-hand side of screen) once all information has been reviewed

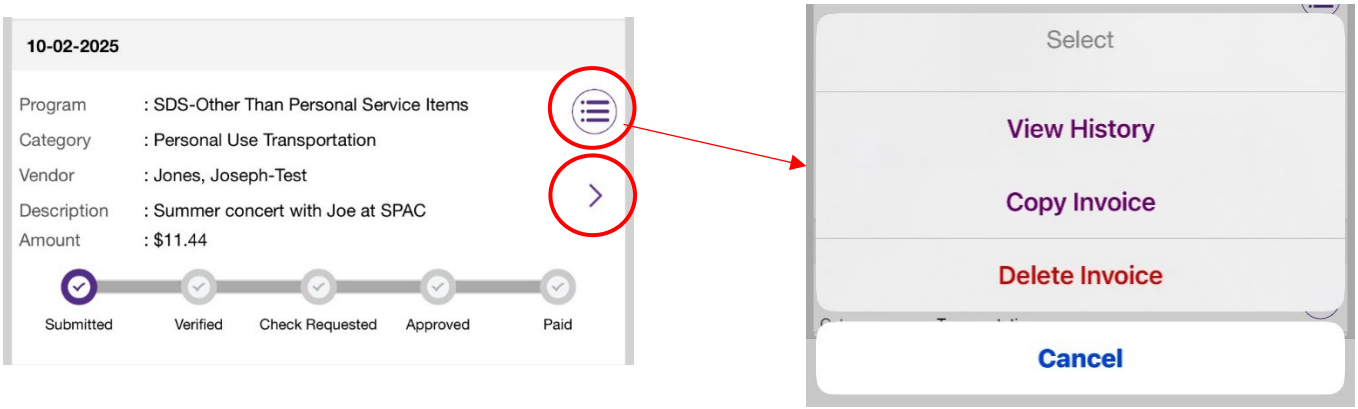


24. Attention screen will indicate mileage was saved successfully; Select 'OK'

25. Invoice will populate in the app as 'Submitted' under the 'View' option



- 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' and select Yes, to copy
- To edit: select purple arrow on specific invoice



Other Than Personal Services (OTPS) Transportation Reimbursement Steps

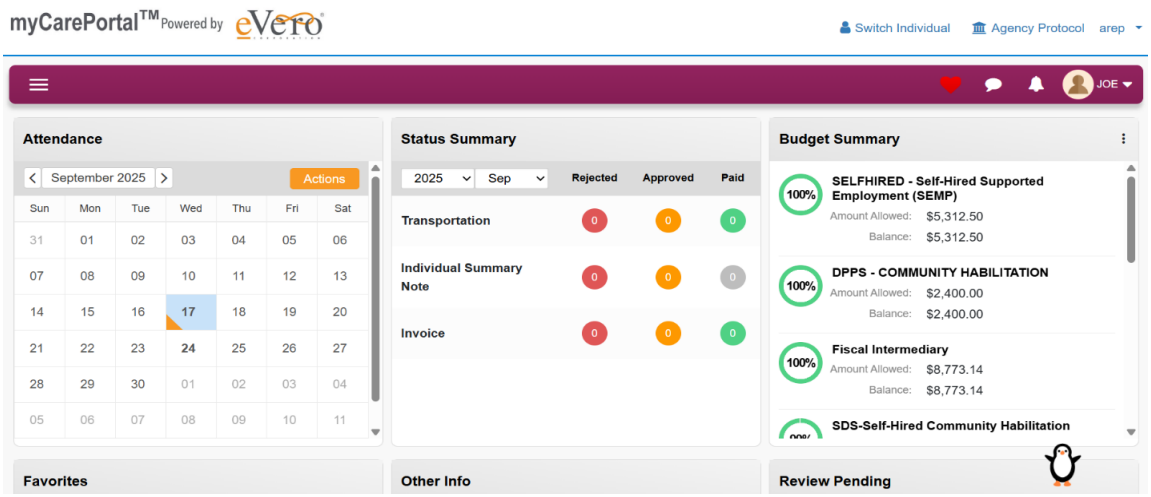
eVeroPortal Website

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

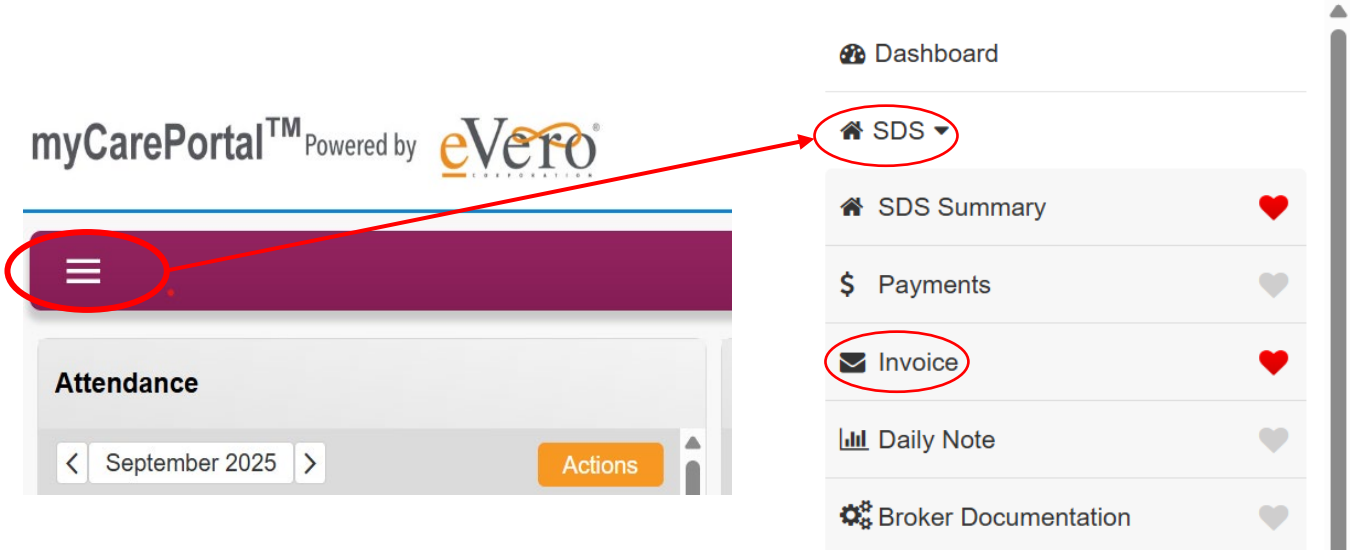
Forgotten User/Password:
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password



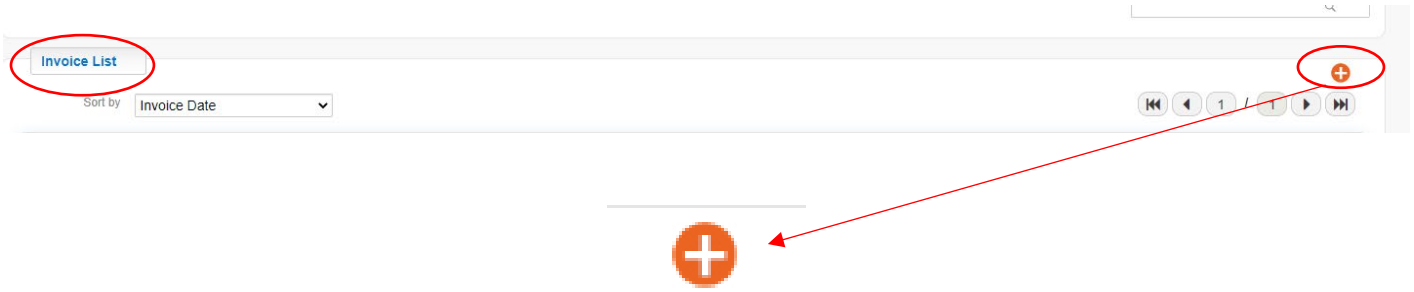
3. Once signed in, the user will be shown the account summary page



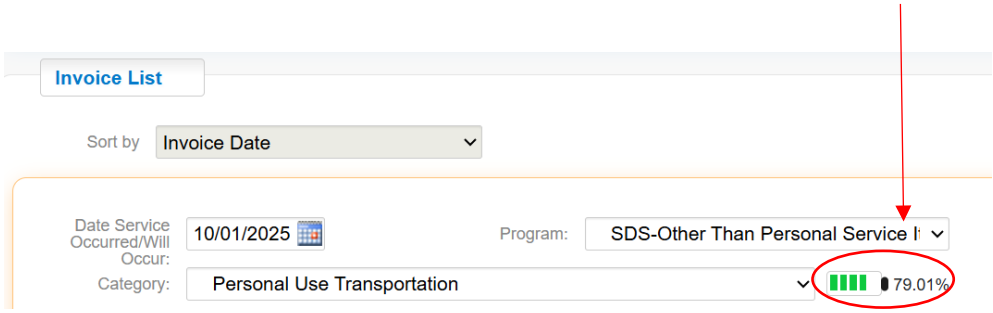
4. Select the three-line dropdown in the top left corner to reveal list of options
5. Under 'SDS' select 'Invoice' to enter reimbursement request



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

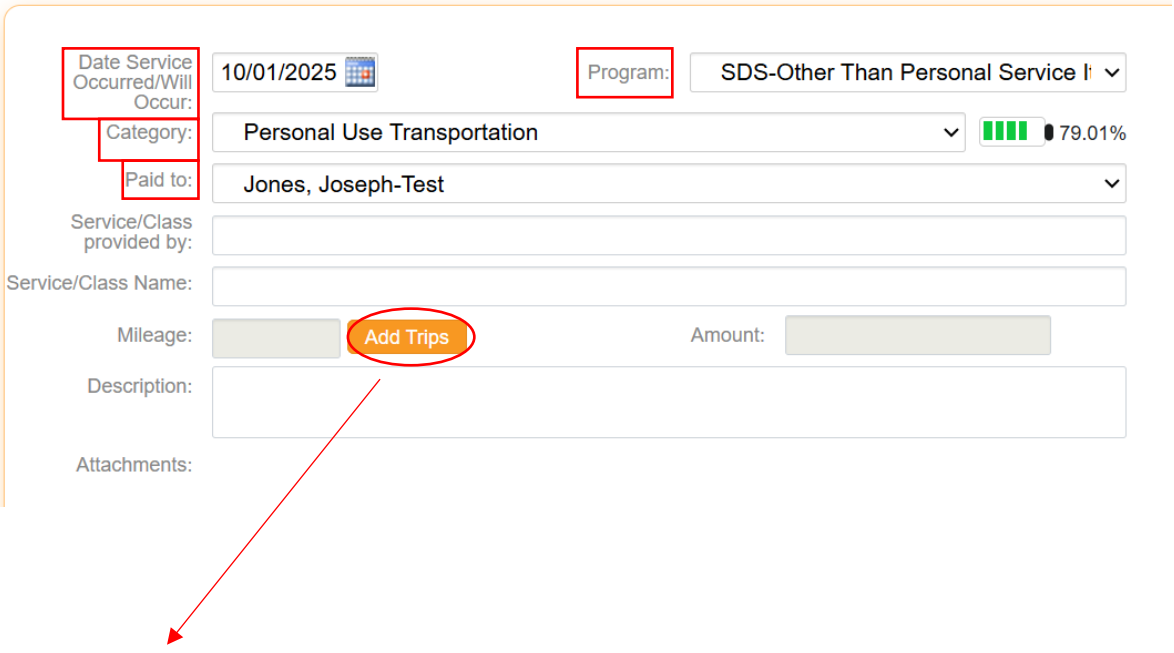


Invoice Note: After selecting the applicable program and category, the funding status and battery bar icon for that specific funding line will appear to the right of the category dropdown to assist with managing available budget balances in real-time



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)

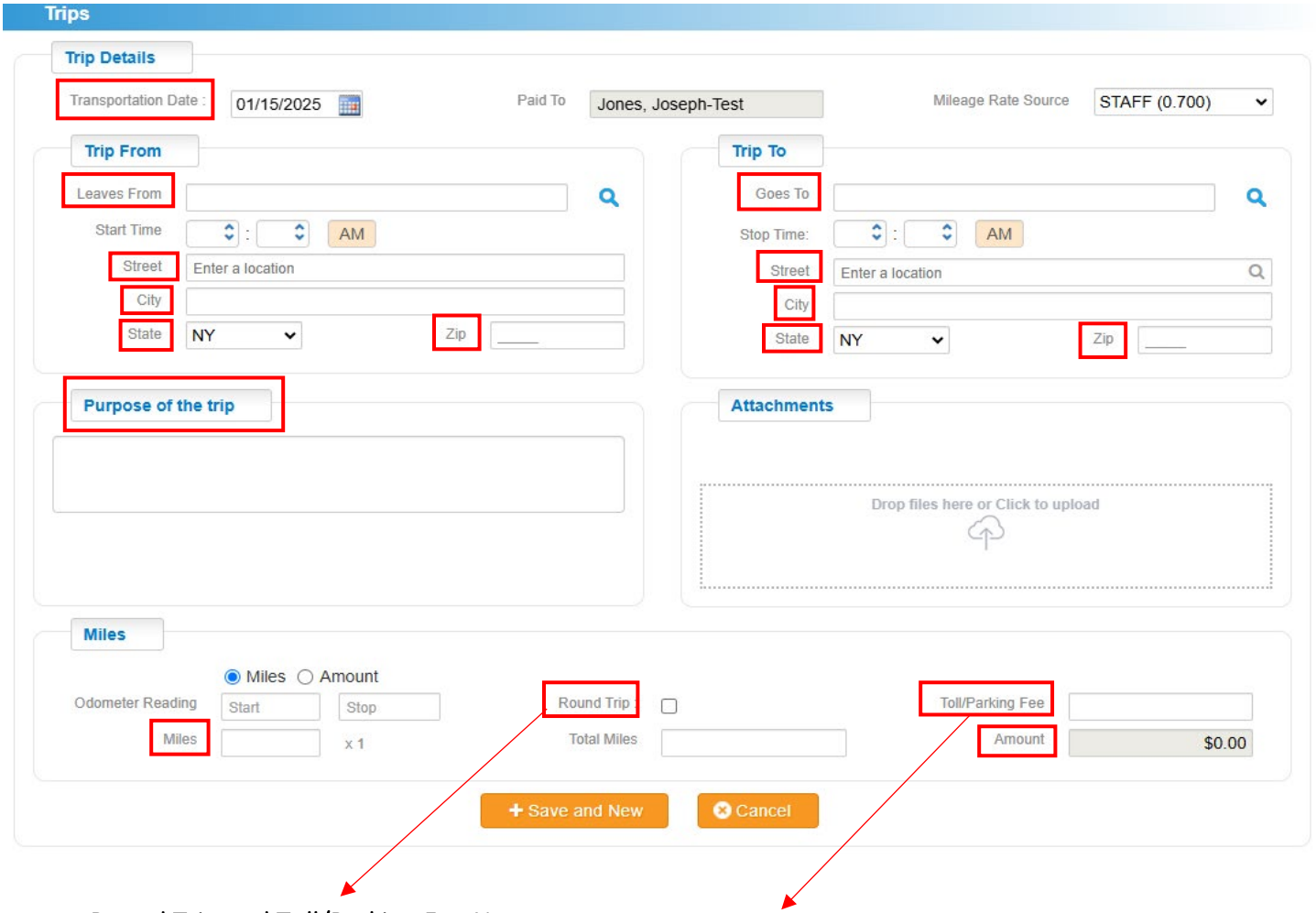
8. Select orange 'Add Trips' button to enter transportation



9. Enter the following information in Trips Window:
   - Date of Service

Add Trips

   - d To: (auto-populates to the person selected for reimbursement)
   - ip From' and 'Trip To'
     - Leaves From/Goes To
     - Street
     - City
     - State
     - Zip
   - 'Purpose of the Trip' will require a brief description of the trip details
   - Miles
   - Amount (auto-populates when miles are entered using verified addresses)



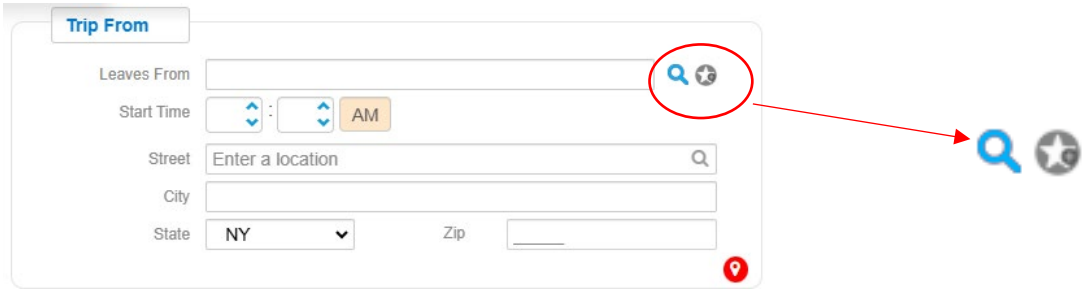
Round Trip and Toll/Parking Fee Note:

- Round Trip is only used for traveling from point A to point B and back to point A (no other stops taken in between)
- If mileage includes a toll this will be entered in the field Toll (fees must have associated

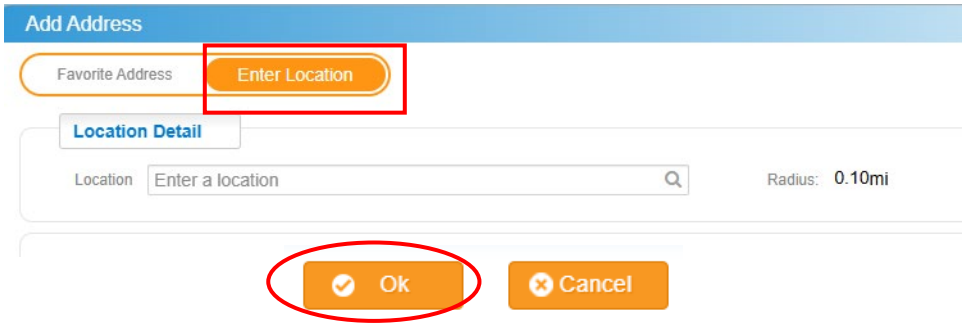


attachments included in trip entry for reimbursement)

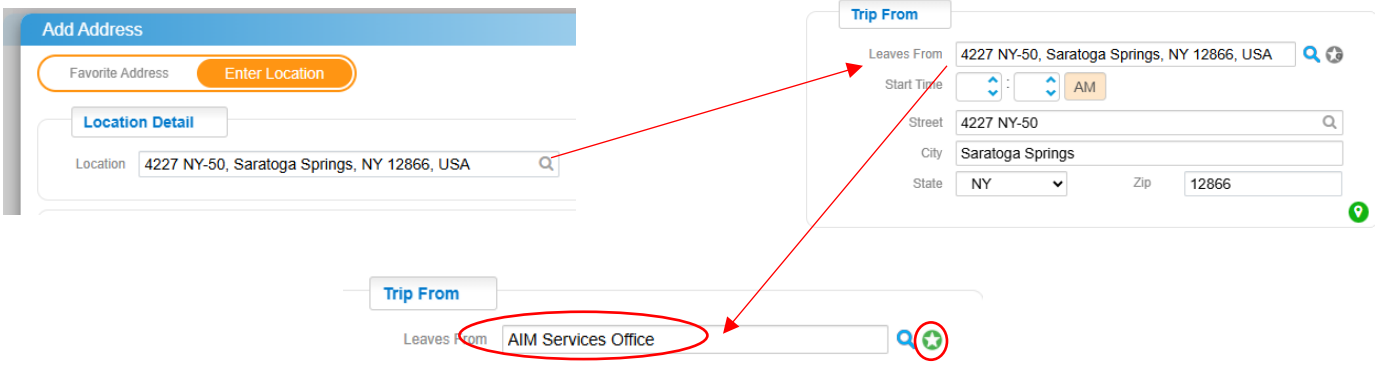
10. To save a location as a favorite address enter full address and select the grey star icon (righthand side of 'Leaves From/Goes To' in trips window)

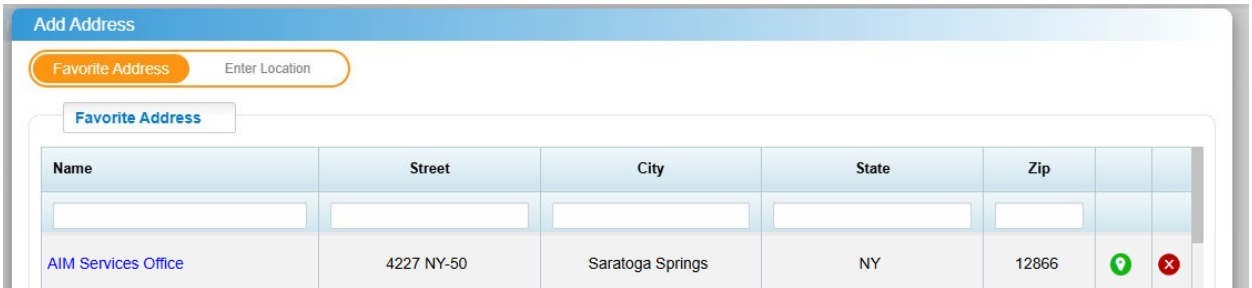


11. To enter a new location, select 'Enter Location' toggle and frere type address details

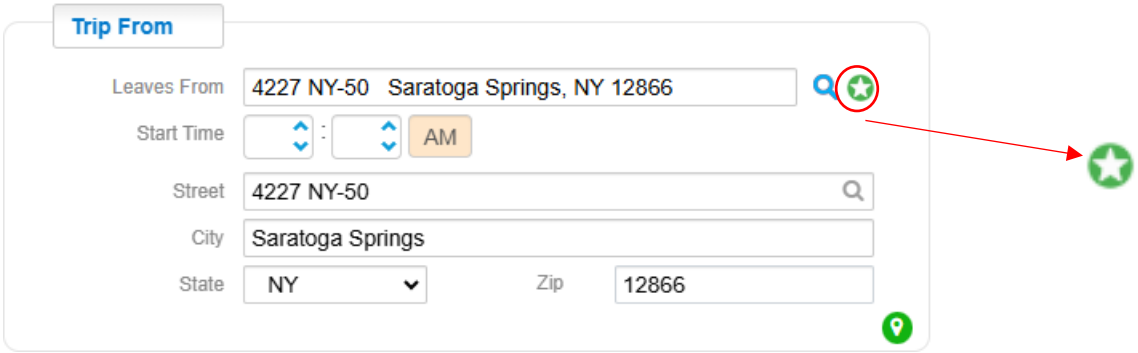


Note: To save an address under a nickname, enter the location first, then rename the 'Leaves From' tab to the preferred nickname, and save as a favorite address by clicking the grey star icon. These will be saved under "Favorite Address"





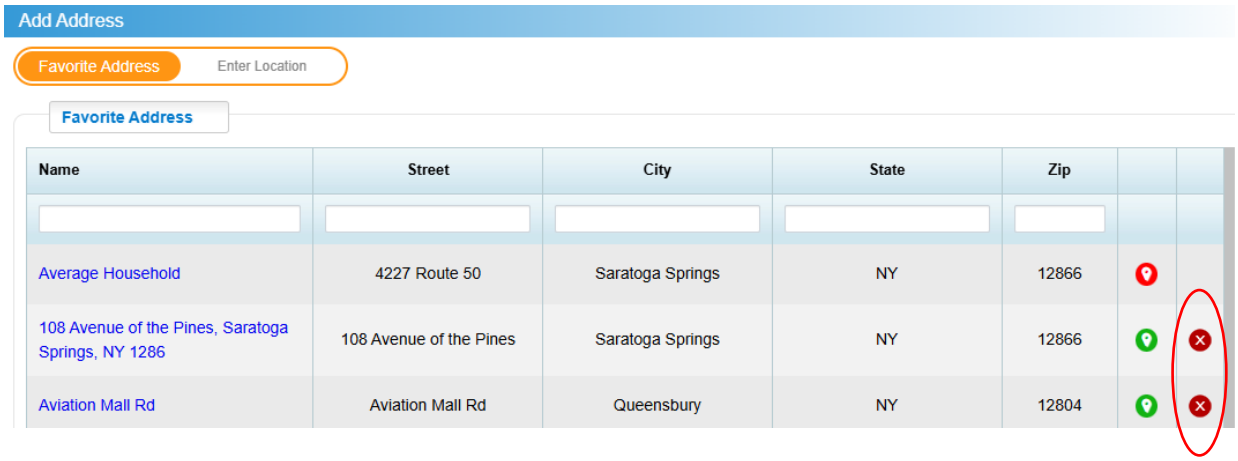
12. Saved addresses are indicated by a green star icon (righthand side of 'Leaves From/Goes To' in trips window)



Please note: To access 'Favorite Address' list select blue search icon



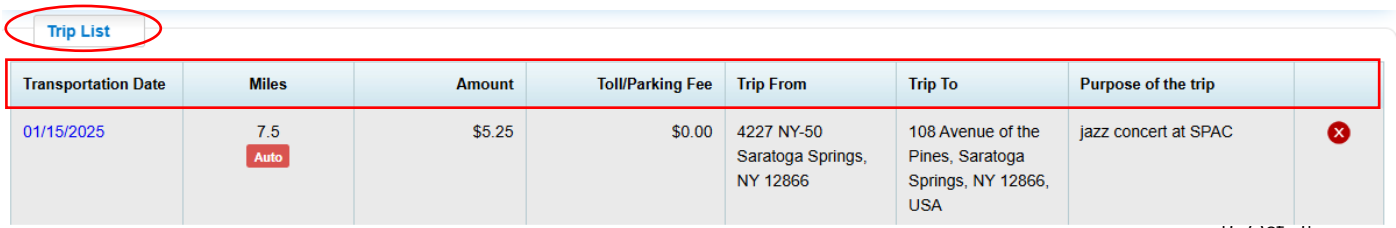
13. To delete favorited addresses, select red X symbol (righthand side of screen)



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



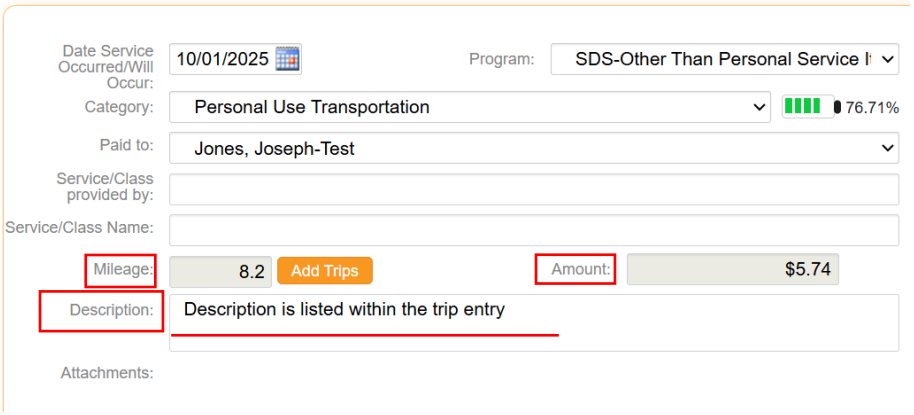
15. Saved trips will populate under 'Trip List'



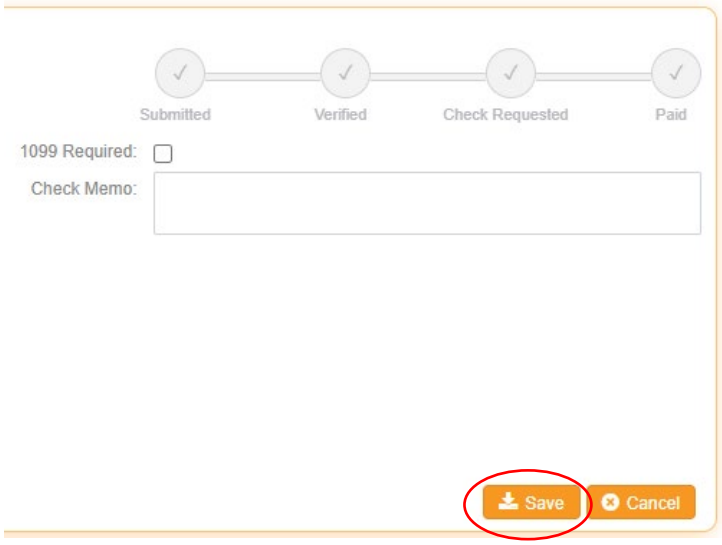
16. Select orange ‘Close’ button once all trips are entered and saved in ‘Trips List’



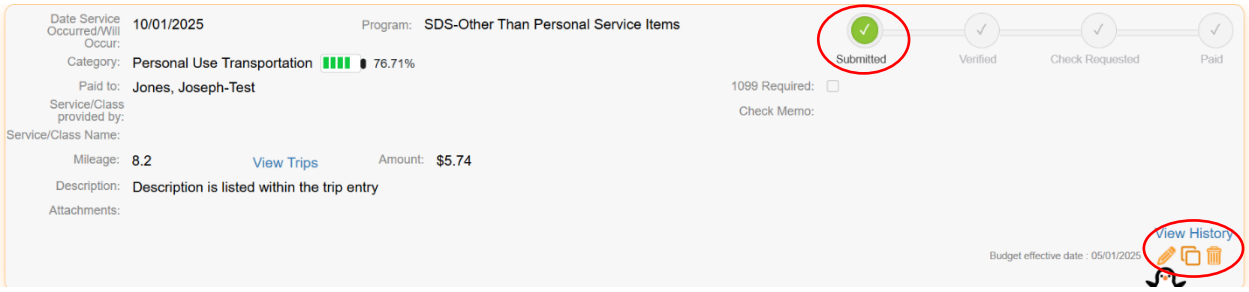
17. Mileage, amount and description will auto-populate into original invoice for all trips entered and saved



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



19. Saved invoices will populate as ‘Submitted’



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