

Other Than Personal Services (OTPS) Reimbursement Steps

eVeroPortal App and Website

eVero Program Categories

(available in approved SD Budget)

OTPS Categories with similar entry steps include the following:

Phone

Internet

Software

Staff Activity Fees (SAF)

Staff Advertising/Recruitment

Staff Training

Personal Use Transportation (PUT)

Clothing

Board Stipend (Food Subsidy)

Utilities

Services Related to Independence

Services Related to Health & Safety

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.

Preapproval Team- 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 preapproval@aimservicesinc.org

AIM Approved Activities- AIM maintains a Self-Direction approved list of activities across NYS; available per request from SD Team

*** eVeroPortal-** utilized by individuals or representatives to submit reimbursement requests
Reimbursement Requests can be submitted on the mobile app or website

Note: this document is designed to show individuals, families, and advocates how to upload invoices for reimbursement

Other Than Personal Services (OTPS) Reimbursement Steps

eVeroPortal App

1. Log into eVeroPortal
*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. 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	>

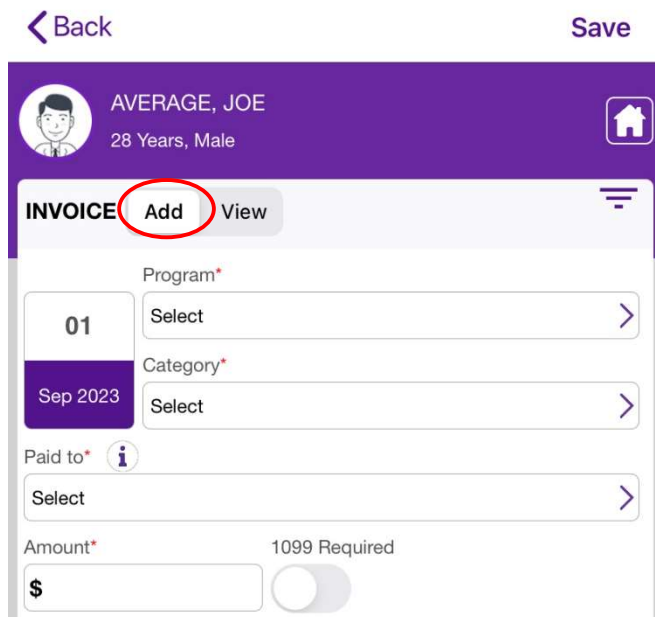
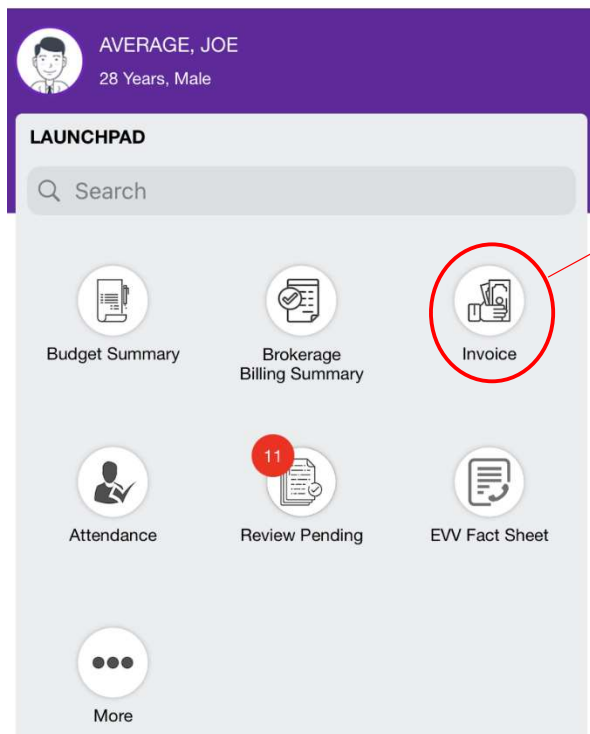
Review Pending

Paid

Transportation	0	>
Invoice	0	>

4. Select 'Invoice' icon on the Menu Launchpad
5. Select 'Add' to enter reimbursement request

Menu

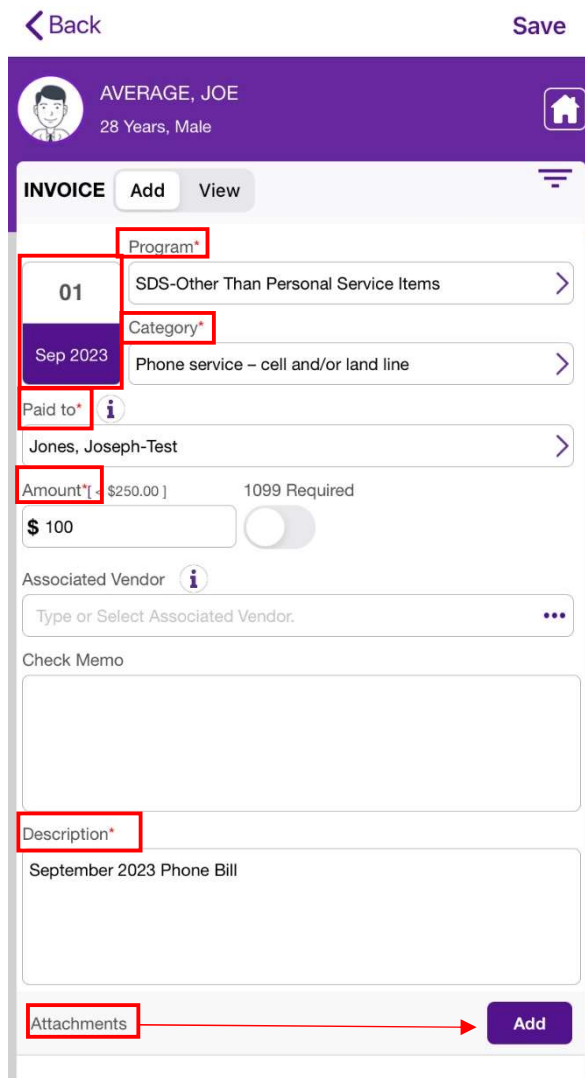


6. Enter the following information for OTPS invoice submission

- Date of Service
- Program: Other Than Personal Services (OTPS)
- Category
- Paid To: (person requesting reimbursement)
- Amount
- Description
- Attachments: itemized invoice and proof of payment (please note that all OTPS categories may vary in programmatic criteria)

Invoice Submission Notes:

- Only Self-Direction **categories in the current budget** will show
- **'Paid To'** field identifies who will receive payment if this invoice is approved; in the event a direct payment is being requested the vendor associated will be used in this field
- **'Amount'** should not exceed the amount of the **invoice**; amount will be verified against the remaining funds in the budget
- **'Description'** field describes the invoice that is being submitted and communicates to support team/bookkeeping
- **'Attachments'** field provides the user with the ability to add supporting documentation for the invoice submission

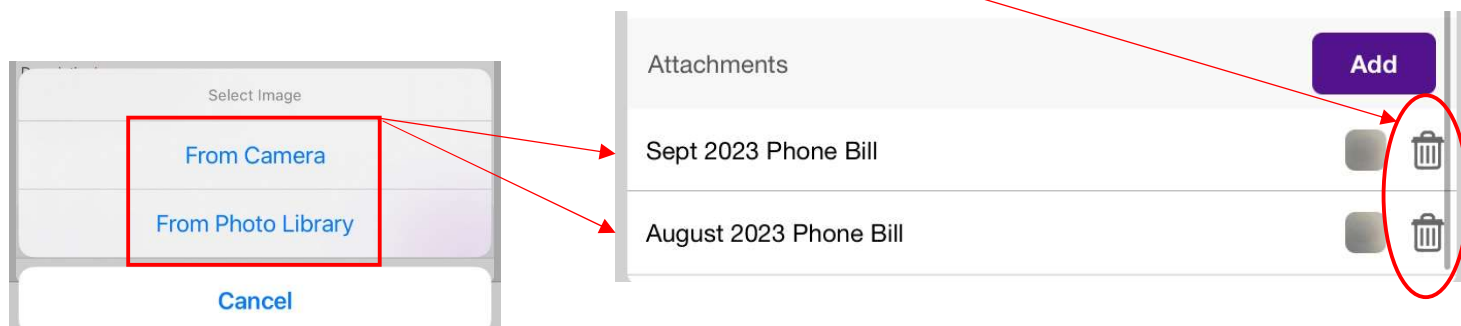


Please Note:

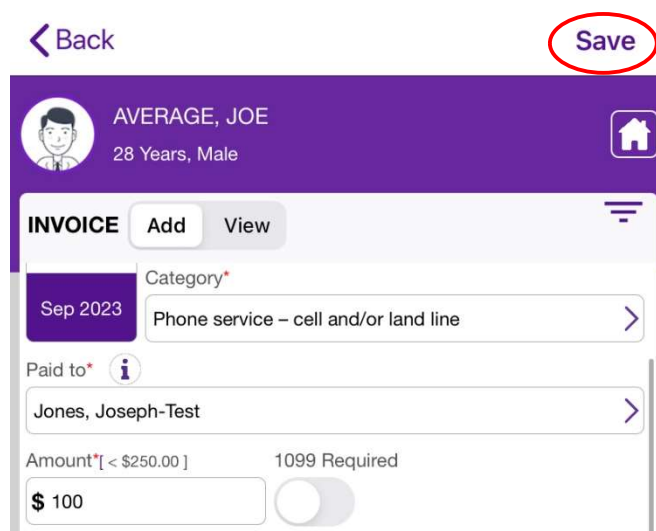
Attachments must be entered by selecting 'Add' using one of two options:

- 'From Camera'
- 'From Photo Library'

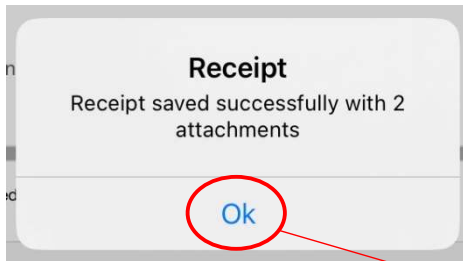
(to delete attachment, select the 'trashcan' icon)



7. Once all fields are entered select the purple 'Save' button (top right-hand corner of screen)



8. Saved invoices will populate as 'Submitted'



< Back

AVERAGE, JOE
28 Years, Male

INVOICE Add View Filter

09-07-2023

Amount : \$50.00

Submitted Verified Check Requested Approved Paid

09-01-2023

Program : SDS-Other Than Personal Service Items
Category : Phone service – cell and/or land line
Vendor : Jones, Joseph-Test
Description : September 2023 Phone Bill
Amount : \$100.00

Submitted Verified Check Requested Approved Paid



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



09-01-2023

Program : SDS-Other Than Personal Service Items
Category : Phone service – cell and/or land line
Vendor : Jones, Joseph-Test
Description : September 2023 Phone Bill
Amount : \$100.00

Submitted Verified Check Requested Approved Paid

Select

View History

Delete Invoice

Cancel

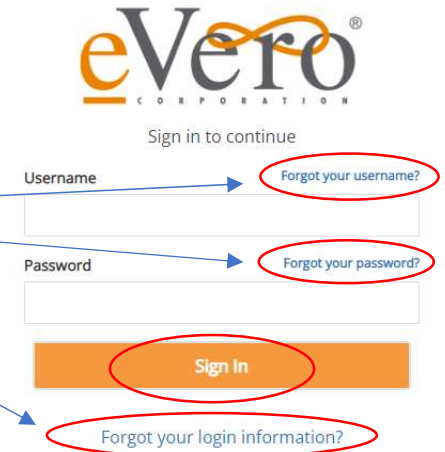
Other Than Personal Services (OTPS) Reimbursement Steps

eVeroPortal Website

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

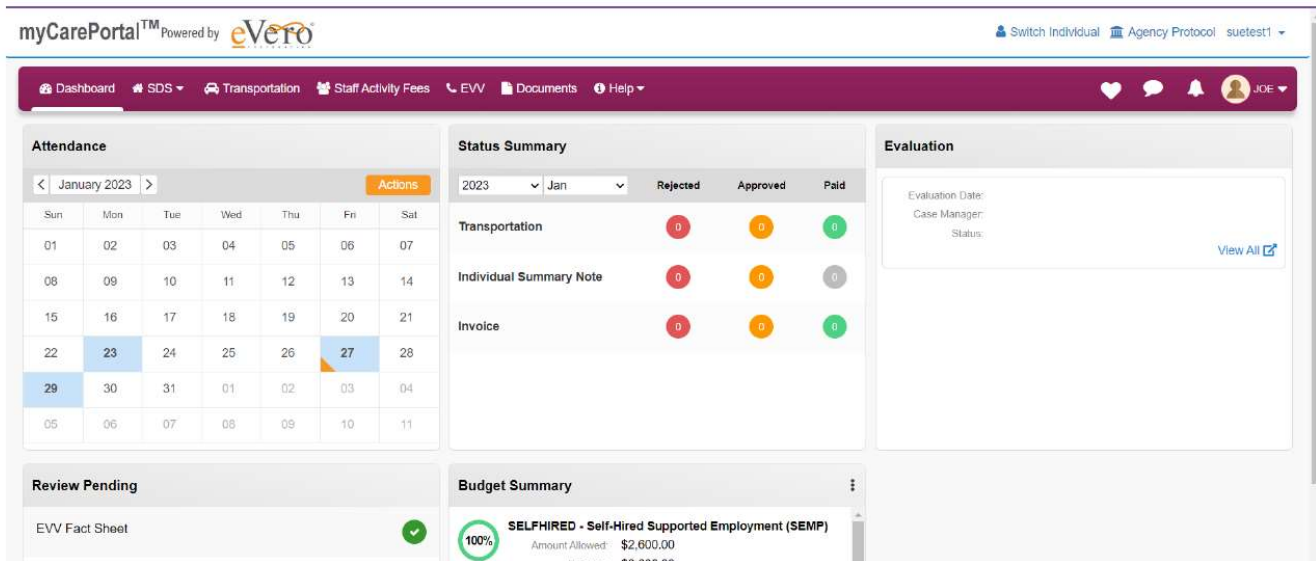
Forgotten User/Password:

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



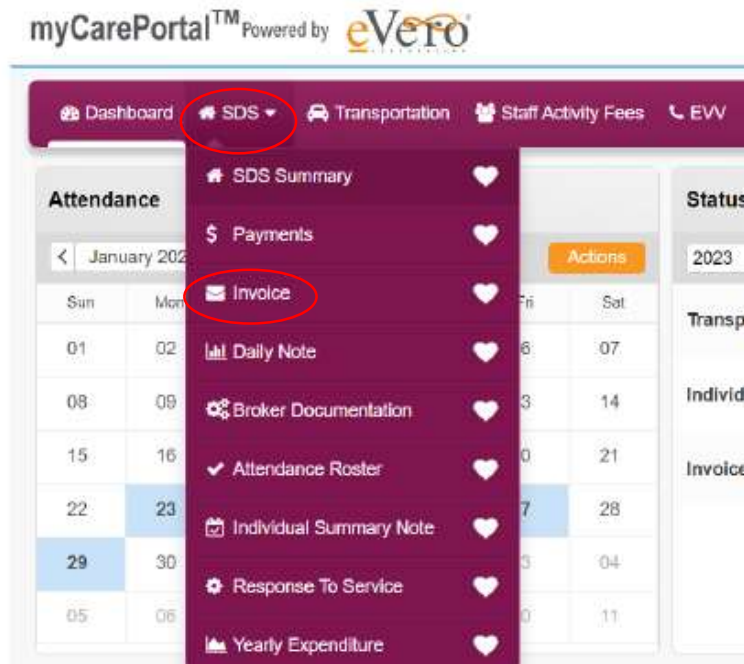
The login page for eVero Corporation. It features the eVero logo at the top. Below the logo, it says "Sign in to continue". There are two input fields: "Username" and "Password". To the right of the "Username" field is a blue link "Forgot your username?". To the right of the "Password" field is a blue link "Forgot your password?". Below the password field is an orange "Sign in" button. At the bottom center, there is a blue link "Forgot your login information?".

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



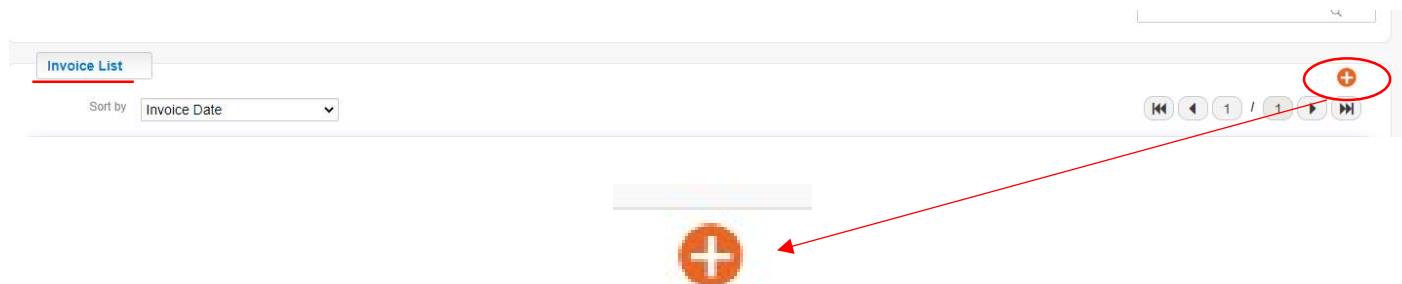
The myCarePortal account summary page. It has a header with the myCarePortal logo and navigation tabs: Dashboard, SDS, Transportation, Staff Activity Fees, EVV, Documents, and Help. The main content area is divided into several sections: Attendance (a calendar for January 2023), Status Summary (a table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

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



The myCarePortal SDS dropdown menu. The "SDS" tab is selected and highlighted with a red circle. The dropdown menu shows several options: SDS Summary, Payments, Invoice (highlighted with a red circle), Daily Note, Broker Documentation, Attendance Roster, Individual Summary Note, Response To Service, and Yearly Expenditure.

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



7. Enter the following information for OTPS invoice submission

- Date of Service
- Program: Other Than Personal Services (OTPS)
- Category:
- Paid To: (person requesting reimbursement)
- Amount
- Description
- Attachments: itemized invoice and proof of payment (please note that all OTPS categories may vary in programmatic criteria)

Date Service Occurred/Will Occur:	04/01/2023	Program:	SDS-Other Than Personal Service Items
Category:	Phone service – cell and/or land line		
Paid to:	Jones, Joseph-Test		
Reimburse to:			
Amount:	\$100.00		
Description:	March 2023 Phone Bill		
Attachments:	<div> <div>0.2 MB March 2023 Phone Bi Remove file</div> <div>0.2 MB April 2023 Phone Bill. Remove file</div> </div>		

Invoice Submission Notes:

- Only Self-Direction **categories in the current budget** will show
- 'Paid To' field **identifies who will receive payment** if this invoice is approved; in the event a direct payment is being requested the vendor associated will be used in this field
- 'Amount' should not exceed the amount of the **invoice**; amount will be verified against the remaining funds in the budget
- 'Description' field **describes the invoice** that is being submitted and communicates to support team/bookkeeping
- 'Attachments' field provides the user with the ability to **add supporting documentation for the invoice submission**

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

The screenshot shows a progress bar at the top with five steps: Submitted, Verified, Check Requested, Approved, and Paid. Below the progress bar, there is a checkbox for '1099 Required:' and a text area for 'Check Memo:'. At the bottom right, there are two orange buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red circle. Below the buttons, it says 'Budget effective date : 01/01/2023'.

- Saved invoices will populate as 'Submitted'

The screenshot shows the same progress bar as before, but now the 'Submitted' status is highlighted with a green checkmark and a red circle. Below the progress bar, there is a checkbox for '1099 Required:' and a text area for 'Check Memo:'. At the bottom right, there is a 'View History' link and two orange icons: a pencil and a trash can. Below these icons, it says 'Budget effective date : 01/01/2023'.

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

This is a close-up of the 'View History' section. It shows the text 'View History' in blue, followed by the 'Budget effective date : 01/01/2023'. Below this, there are two orange icons: a pencil and a trash can. These icons are highlighted with a red circle.