

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

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 >

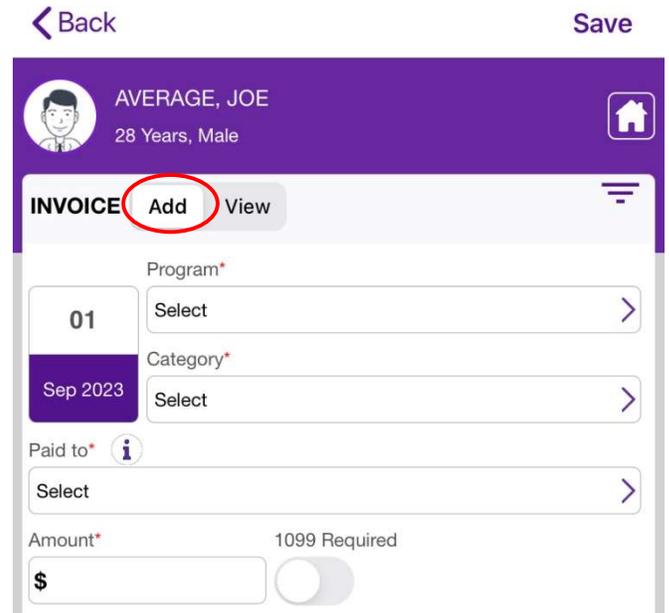
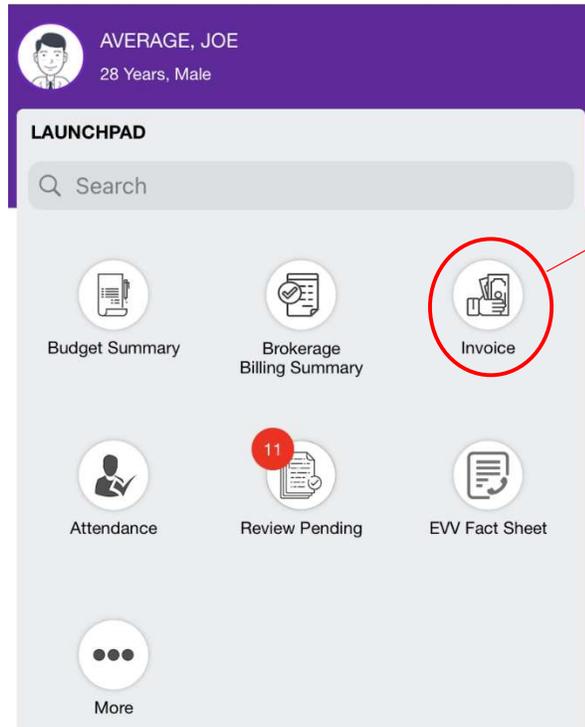
Review Pending

Paid

Transportation	0 >
Invoice	0 >

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

Menu

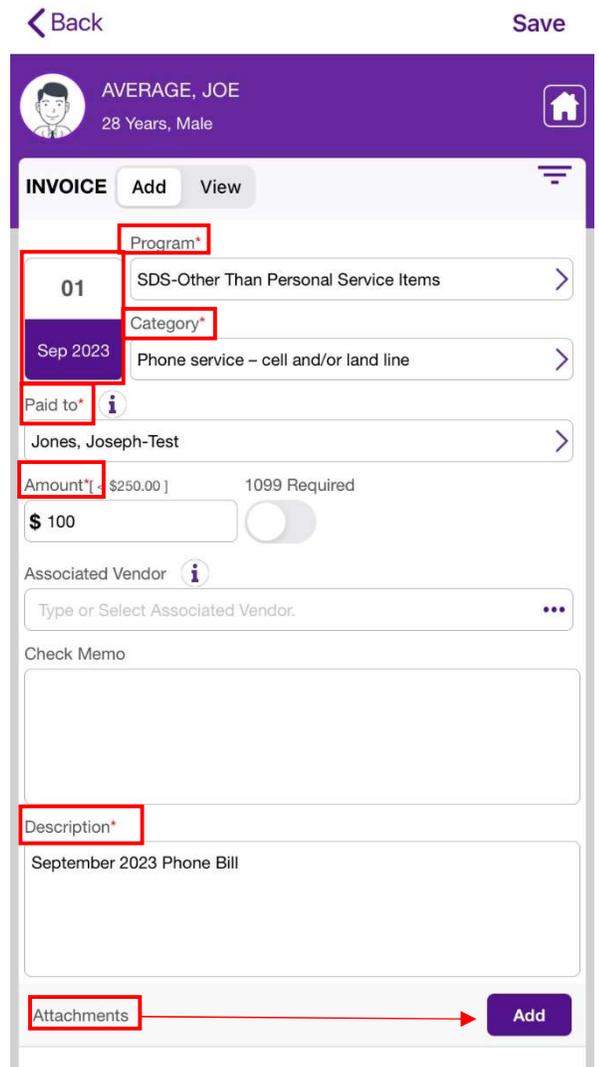


6. Enter the following information for OTPS invoice submission

- 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:

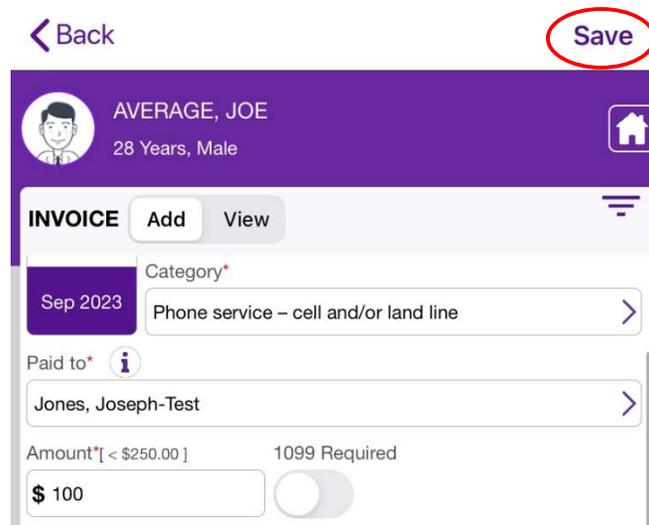
Attachments must be entered by selecting 'Add' using one of two options:

- 'From Camera'
- 'From Photo Library'

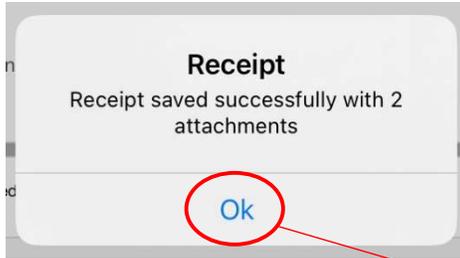
(to delete attachment, select the 'trashcan' icon)



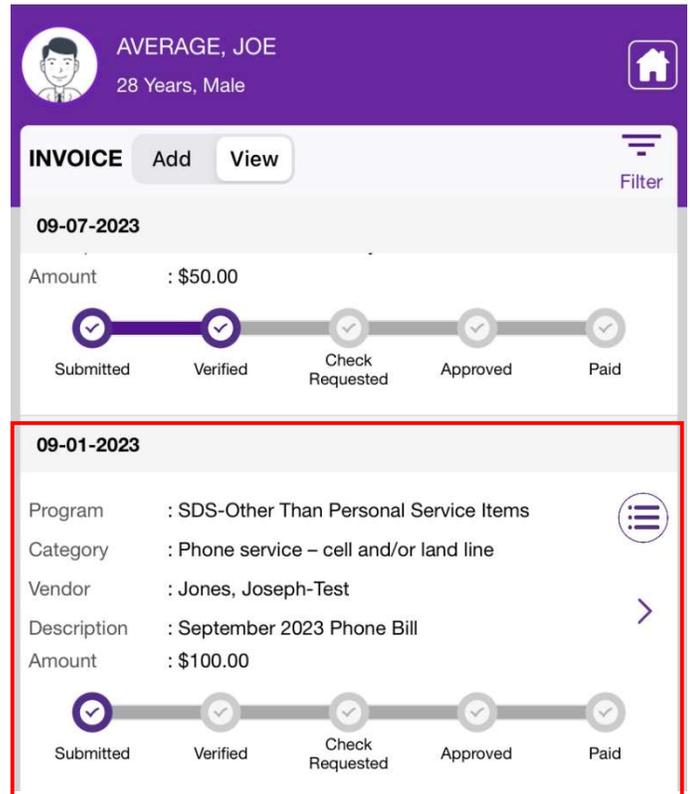
7. Once all fields are entered select the purple 'Save' button (top right-hand corner of screen)



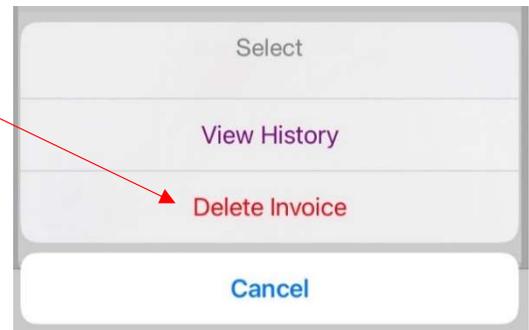
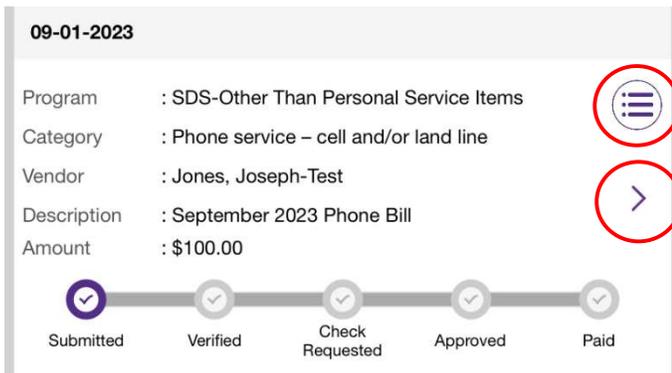
8. Saved invoices will populate as 'Submitted'



Back



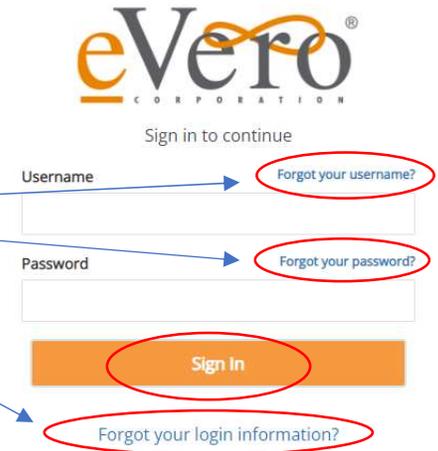
- To delete: select purple dropdown icon on specific invoice; select 'Delete Invoice' to permanently delete
- To edit: select purple arrow on specific invoice



Other Than Personal Services (OTPS) Reimbursement Steps

eVeroPortal Website

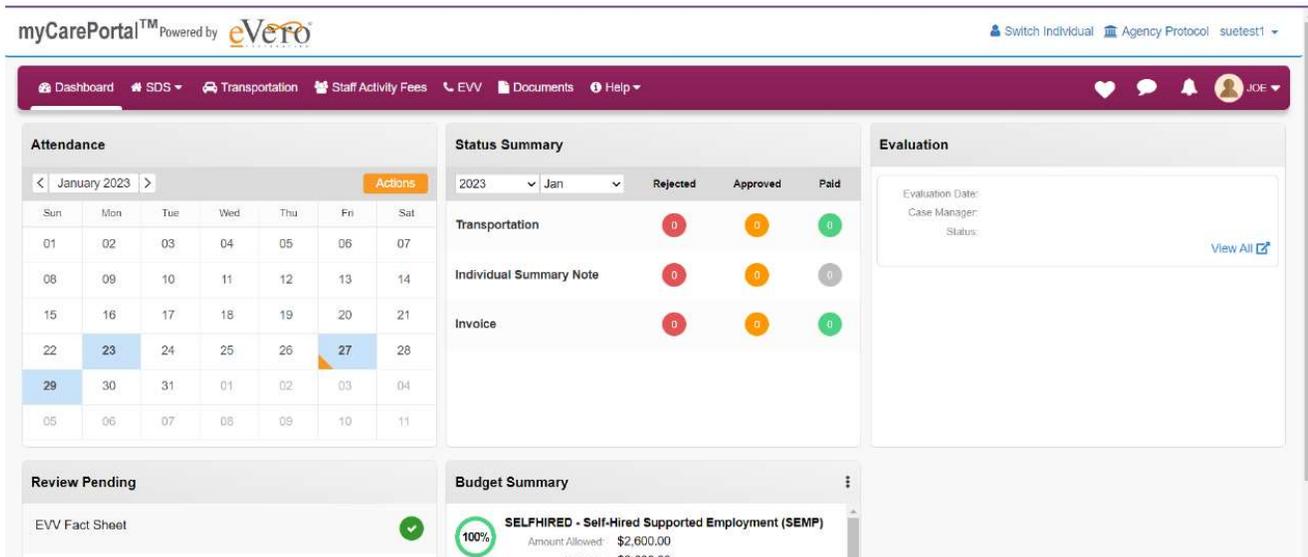
1. Log into eVeroPortal at signin.evero.com
*Username and Password selected by user
2. Select 'Sign In'



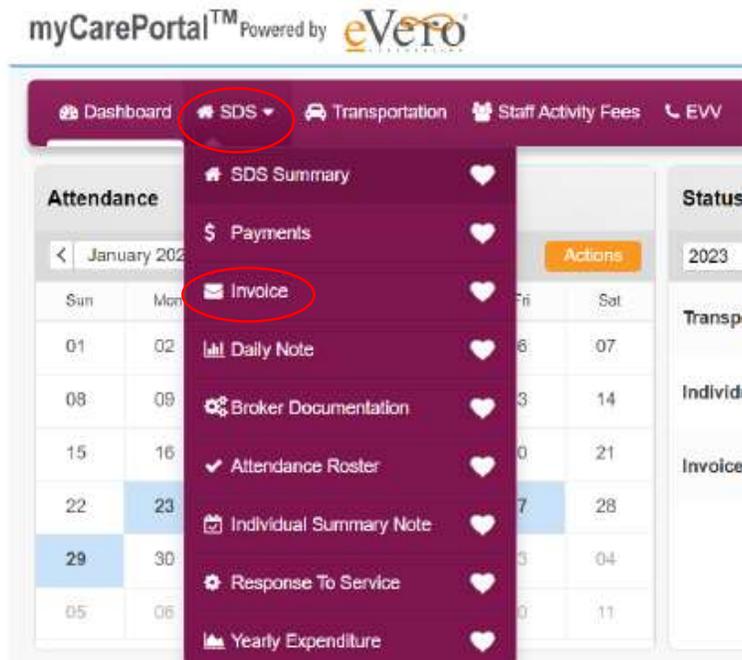
Forgotten User/Password:

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

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



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

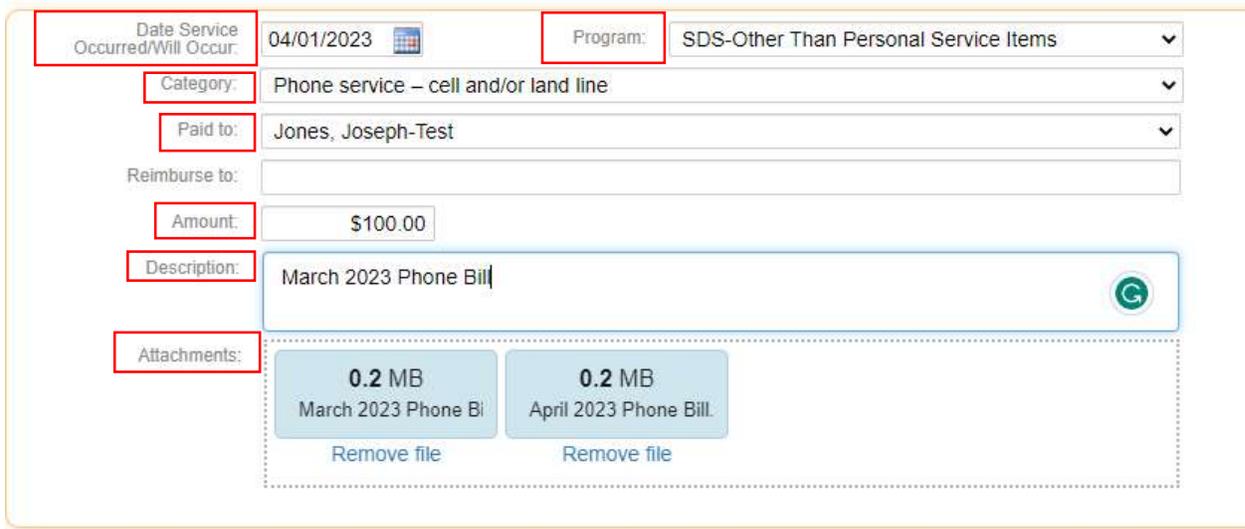


6. Select the 'Orange Plus Sign' (top right-hand corner) under 'Invoice List'



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- 'Attachments' field provides the user with the ability to **add supporting documentation for the invoice submission**

8. 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

9. Saved invoices will populate as 'Submitted'

Submitted Verified Check Requested Approved Paid

1099 Required:

Check Memo:

View History

Budget effective date : 01/01/2023

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

View History

Budget effective date : 01/01/2023