Individual/Representative **App Navigation Resource**

eVeroPortal

eVeroPortal

eVeroPortal- utilized by individuals and representatives to manage the Self-Direction budget. Portal access is available on the mobile app or website; link: https://signin.evero.com/

Downloading eVero App- to download the app please visit your mobile device app store (Android or Apple); link: https://www.evero.com/apps/everoportal-mobile-app/

AIM eVeroPortal Trainings- AIM offers training sessions available on the AIM Self-Direction Education Calendar; link:

https://www.aimservicesinc.org/self-direction/education-calendar/#rep-training

Additional AIM Supports

AIM Self-Direction Web Portal- https://www.aimservicesinc.org/self-direction/

AIM Self-Direction Team

- **Self-Direction Coordinator-** Assists with general team communications, documentation, eVero questions
- **Staff Supports Coordinator-** Assists with general HR questions, employee benefits as applicable, leave of absence
- **Accounts Payable Specalist-** Assists with reimbursement requests and policies
- **eVero Payroll-** everopayroll@aimservicesinc.org
    - Assists with payroll processing, payroll documentation, and time off (PTO)
- **SD Support-** SDSupport@aimservicesinc.org
    - Assists with additional team supports as needed
    - SD Support Team hosts weekly live staff trainings via Zoom; reach out to SD Team for more information on scheduling

eVeroPortal Navigation Resource includes the following:

Widget Key | Menu Navigation | Dashboard Navigation

SDS Summary Navigation | Additional App Setting | Manage Signature

How to Change a Password | How to Log Out

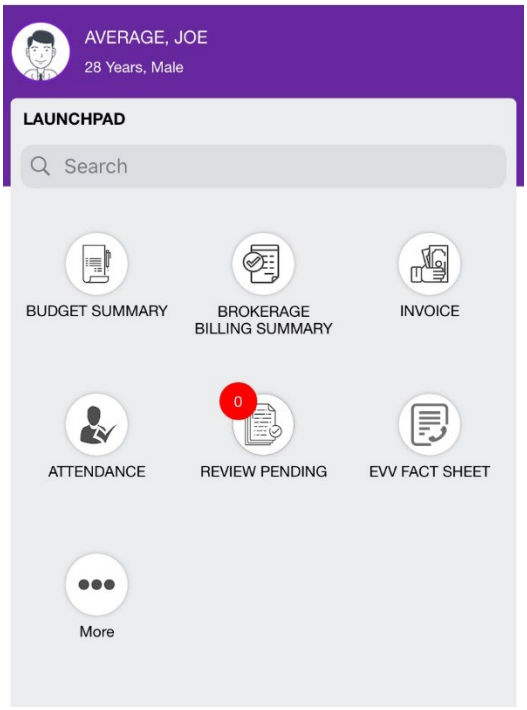
Individual/Representative **App Widget Key**

eVeroPortal

Menu/Launchpad

- Widgets:
  - Budget
  - Broker Billing
  - Invoice
  - Attendance
- 'More' Menu

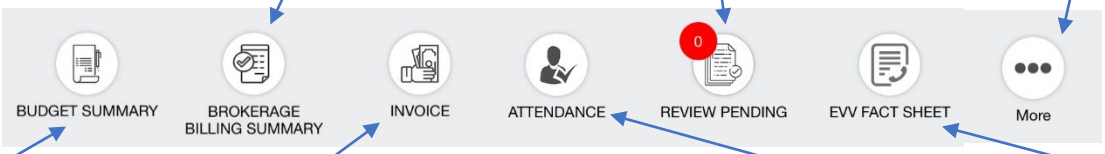
Menu



Brokerage Billing Summary- Broker Billing information and invoiced amount

'Review Pending'- Invoices submitted that are pending Individual/Rep review

'More'- Additional eVeroPortal menu selections for the Individual/Rep.



Budget Summary- Active expenditure report on current budget and available funding

Invoice- To submit reimbursement using active budget/availability of funds

Attendance- For Individual/Rep approval of shifts worked by Self-Hired Staff

'EVV' Fact Sheet- Infographic outlining required Electronic Visit Verification (This document will require an annual review by a representative)

Individual/Representative **App Navigation**

eVeroPortal

Menu Dropdown-

Overview
- Demographic Info
- Health Info

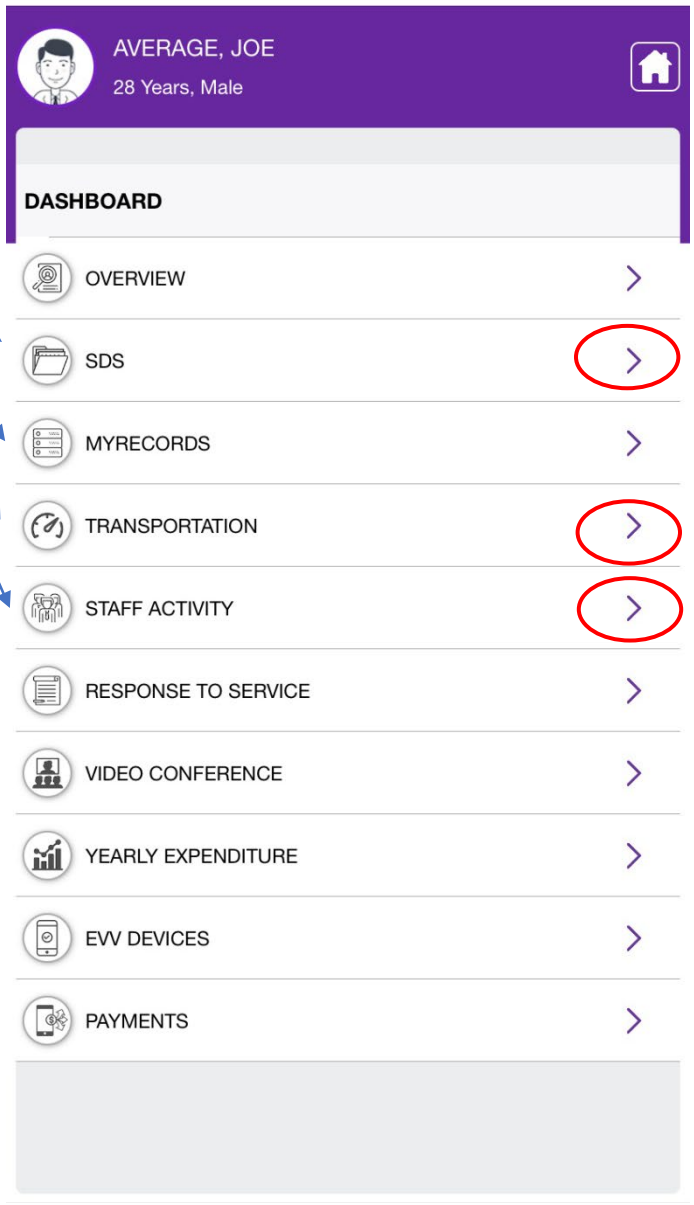
SDS (Self-Direction Services)
- Budget Summary
- Service Plan
- Broker Agreement
- Monthly Expenditure
- Broker Billing Summary
- Yearly Expenditure
- Monthly Summary List

My Records
- LCED, Life Plan, Service Plan

Transportation
- Individual Mileage
- Staff Mileage

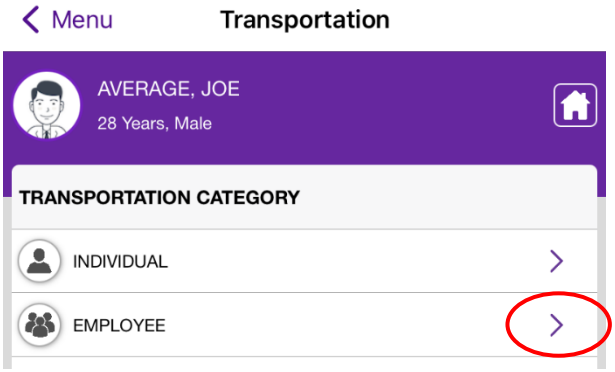
Staff Activity
- Fees for self-hired staff

Menu

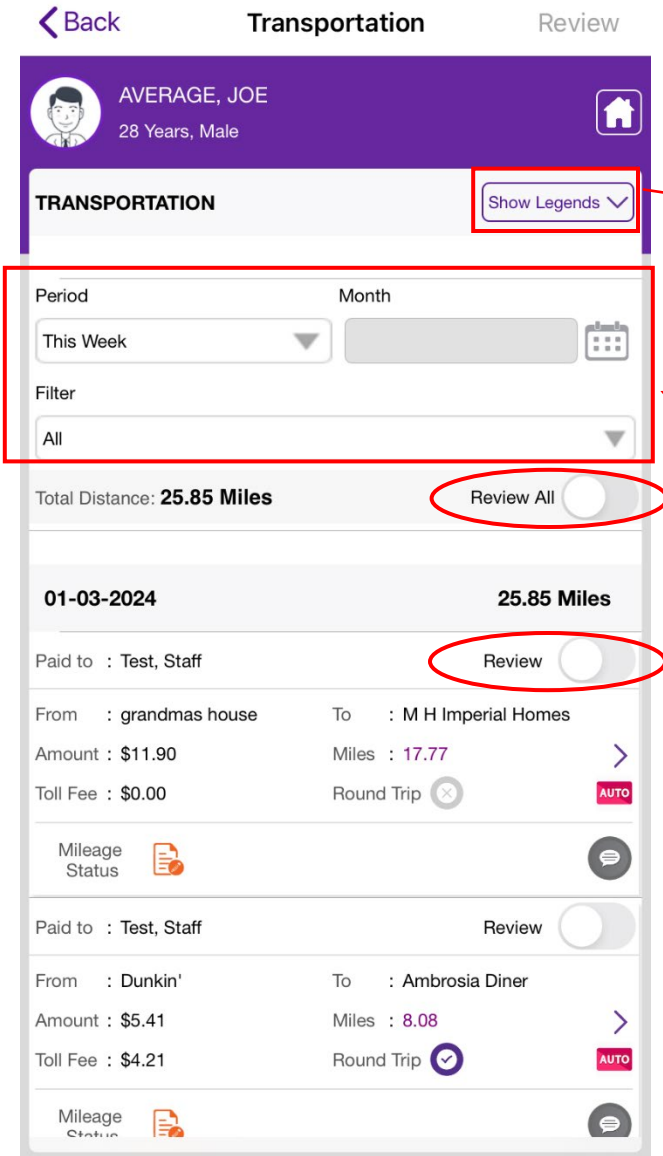


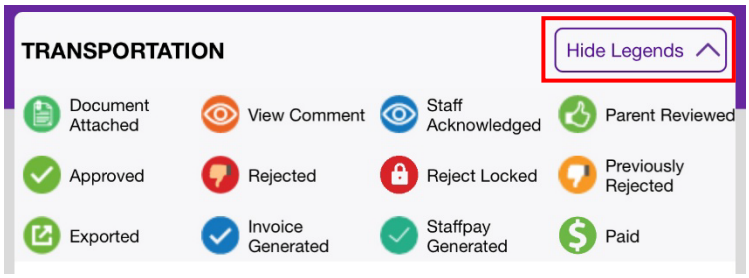
Navigating **Transportation Categories**

Employee- this transportation is for entries made by self-hired staff (com hab or respite) for reimbursement against the self-direction budget for staff portion of mileage



To View Legend: Select 'Show legends', to reveal dropdown menu of the Mileage status Key





Filtering Mileage Entries-

Portal user can filter for specific entries by indicating the following fields:

- Period
- Month
- Filter type

Reviewing Mileage Entries-

Portal user can individually review specific entries by indicating using the top right-hand corner or select the option to review all entries for the designated period

Navigating **Staff Activity Fees**

Staff Activity this reimbursement request is for entries made by self-hired staff (com hab or respite) for reimbursement against the self-direction budget for staff portion of expenses and fees

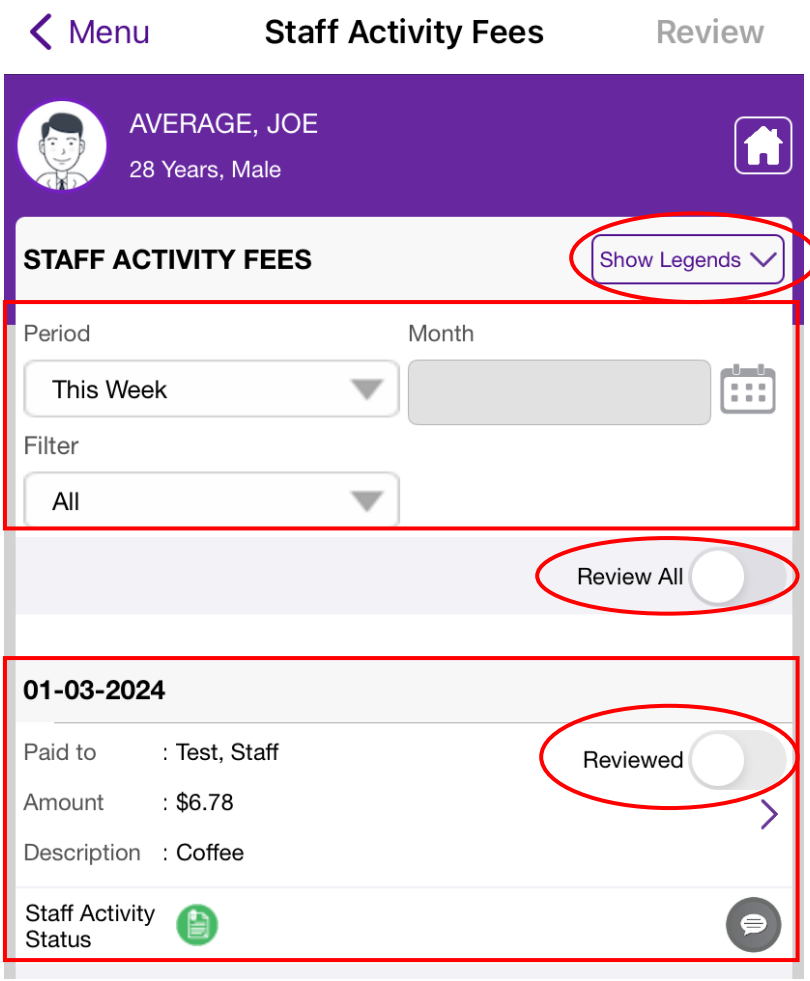
Filtering Staff Activity Entries-

Portal user can filter for specific entries by indicating the following fields:

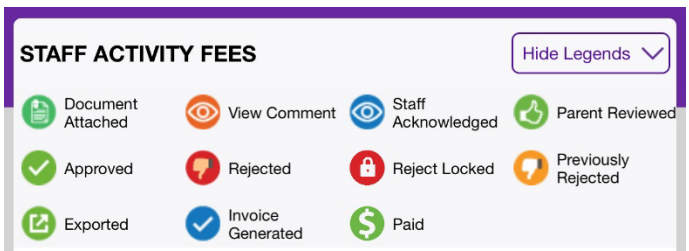
- Period
- Month
- Filter type

Reviewing Staff Activity Entries-

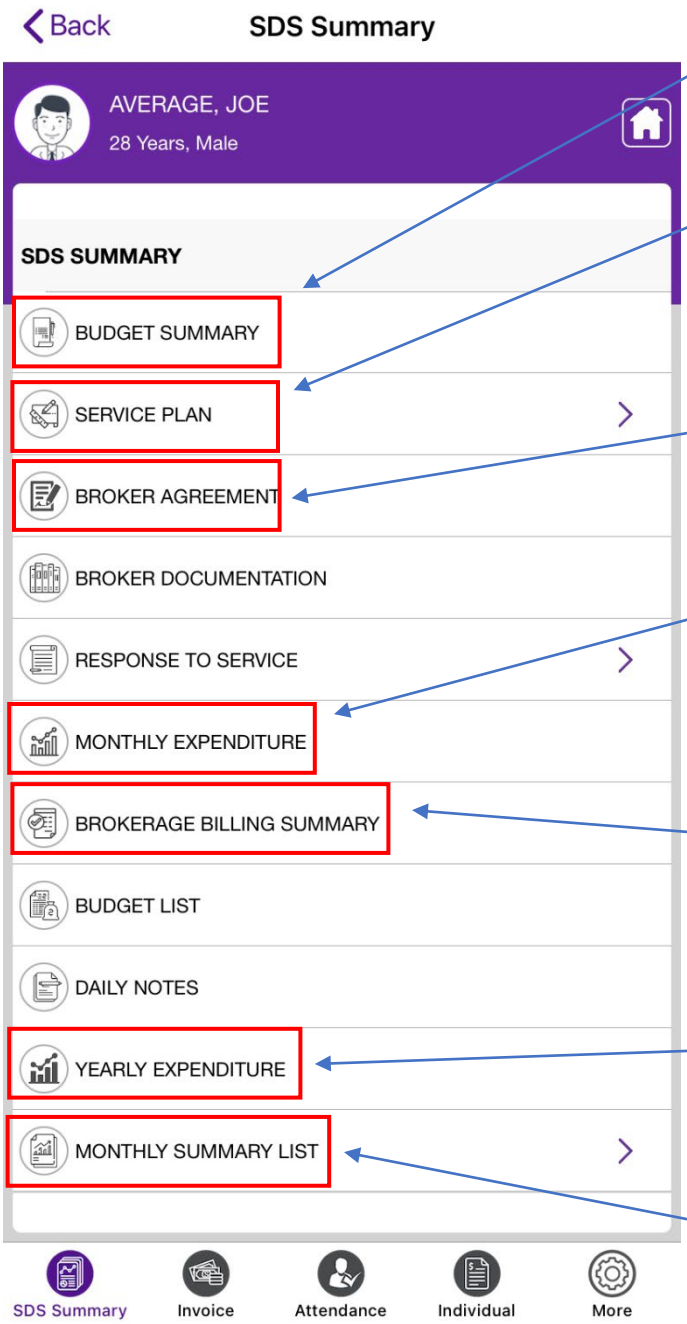
Portal user can individually review specific entries by indicating using the top right-hand corner or select the option to review all entries for the designated period



To View Legend: Select 'Show legends', to reveal dropdown menu of the Mileage status Key



Navigating the **Self-Directed Services (SDS) Summary**



SDS Summary-

- Budget Summary navigates to active expenditure report on current budget and available funding
- Service Plan navigates to active self-hired community habilitation staff action service plans and record keeping of previous documents
- Broker Agreement navigates to active support broker agreements and record keeping of previous documents
- Monthly Expenditure navigates to active monthly reports on expenses reimbursed through the budget year and record keeping of previous documents
- Broker Billing Summary navigates to active broker billing invoices submitted for supports and services provided during the year
- Yearly Expenditure navigates to active yearly reports on expenses reimbursed throughout the budget year
- Monthly Summary List navigates to self-hired com hab documentation submitted monthly tied to active staff services and record keeping of previous documents

Navigating the SDS **Budget Summary**

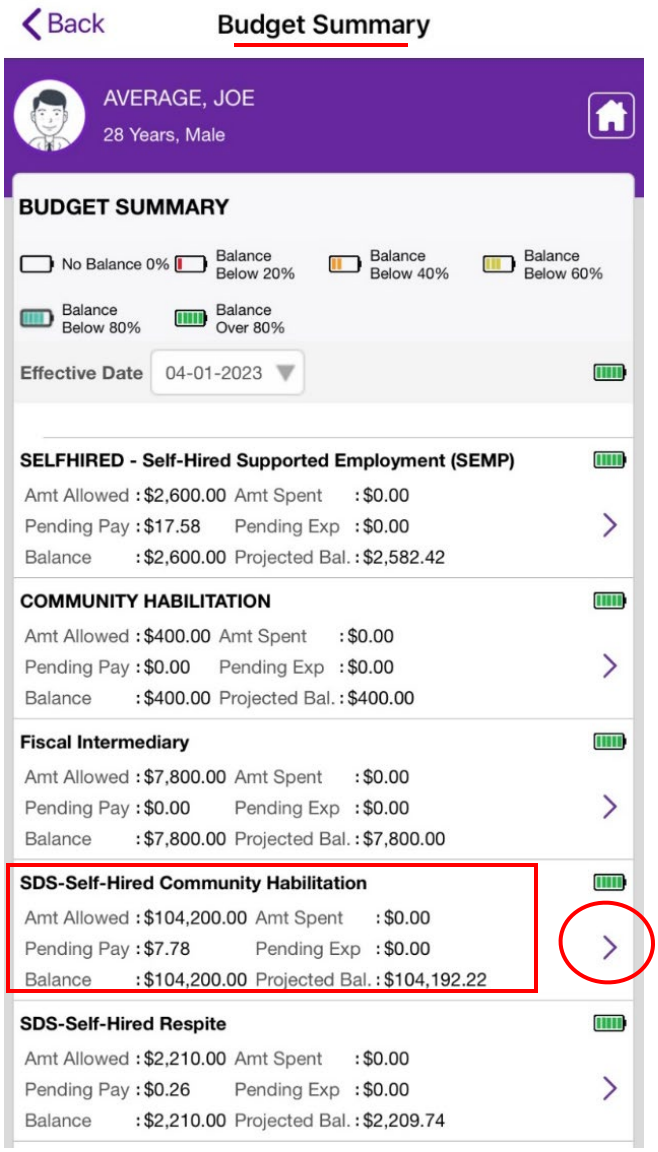
Budget Summary navigates to active expenditure report on current budget and available funding

Budget Effective Date- populates the current budget from the annual effective date

Note: budget funds annually reset on the effective date outlined

Reviewing Budget Categories-

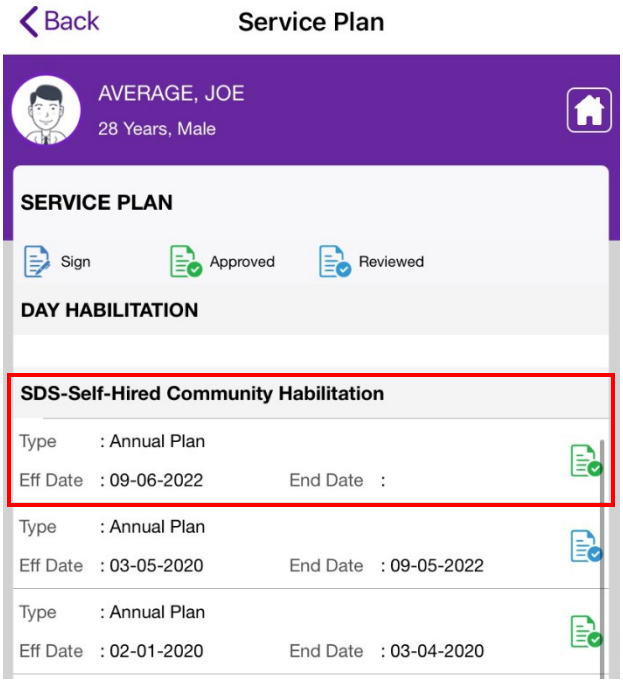
Portal user can individually review budget categories by selecting the arrow on the right-hand side of screen for specific expenditure reports and the status of budget funding in programs such as Individual Directed Goods-Services (IDGS) and Other Than Personal Services (OTPS)



Navigating the SDS **Service Plan**

Service Plan navigates to active self-hired community habilitation staff action service plans and record keeping of previous documents

Reviewing Service Plans -
Portal user can individually review service plans by selecting the desired document for details on staff methods that have been outlined during person-centered planning

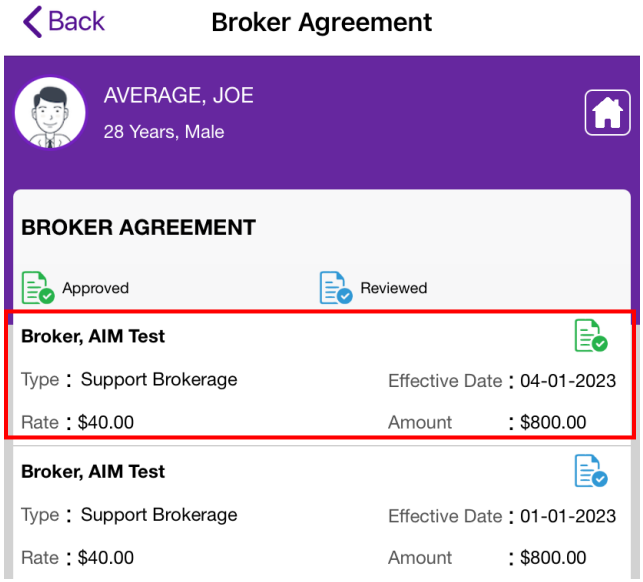


Navigating the SDS **Broker Agreement**

Broker Agreement navigates to active support broker agreements and record keeping of previous documents

Reviewing Broker Agreements-
Portal user can individually review agreements by selecting the desired document for details on the supports and services provided by brokers

Note: brokers will use this agreement to submit invoices for person-centered supports and services provided to the individual during the current budget year

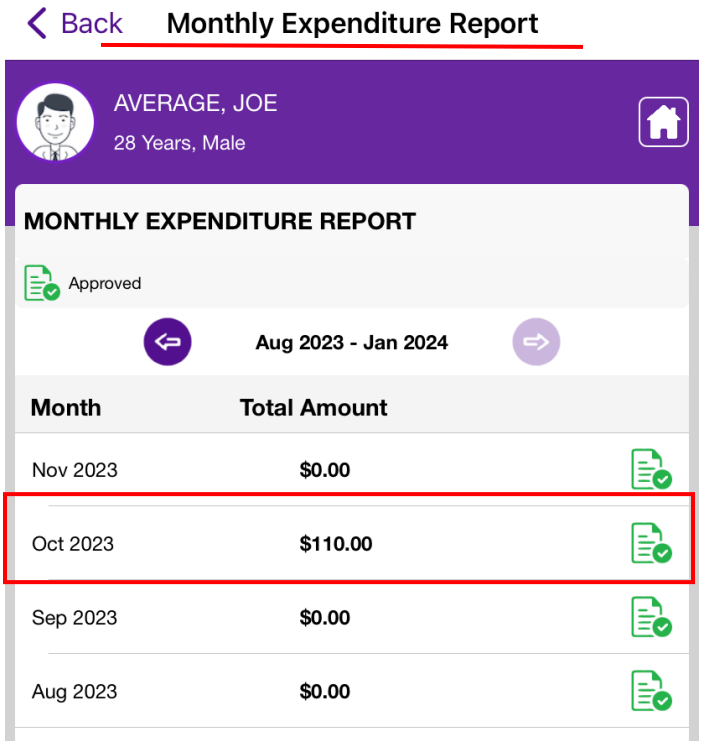


Navigating the SDS **Monthly Expenditure Report**

Monthly Expenditure navigates to active monthly reports on expenses reimbursed through the budget year and record keeping of previous documents

Reviewing Expenditures-
Portal user can individually review expenditure reports on paid items line by line for the selected month

Note: document can be downloaded to assist with managing the budget

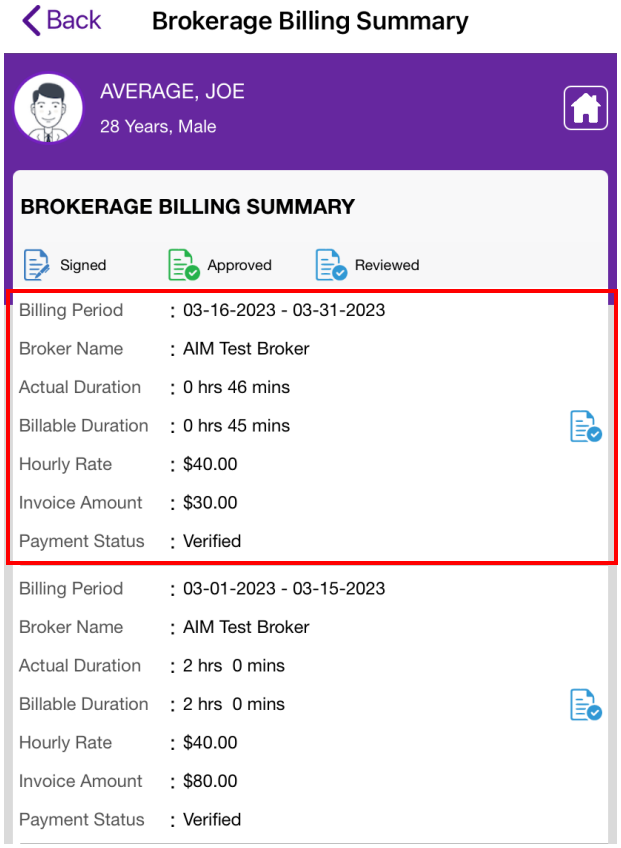


Navigating the SDS **Brokerage Billing Summary**

Broker Billing Summary navigates to active broker billing invoices submitted for person-centered supports and services provided to the individual during the current budget year

Note: brokers will use the broker agreement to identify current supports and services in billing summaries

Reviewing Mileage Entries-
Portal user can individually review broker billing by selecting the desired document for details on broker methods outlined during person-centered planning

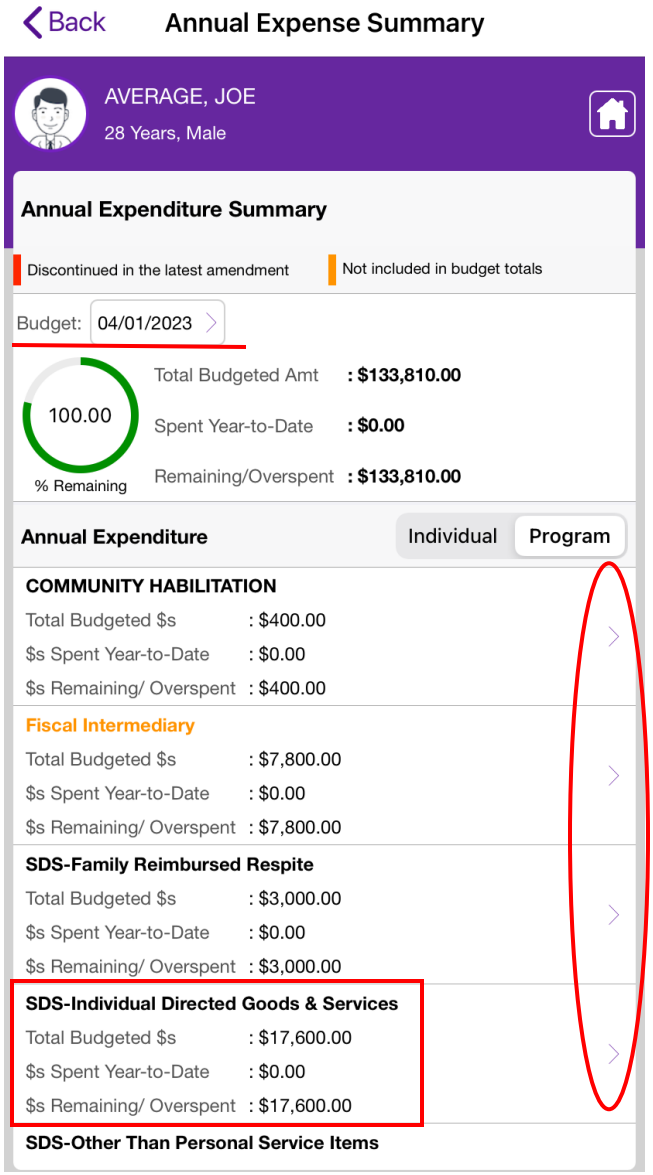


Navigating the SDS **Annual Expense Summary**

Yearly Expenditure navigates to active yearly reports on expenses reimbursed throughout the budget year

Reviewing Expenditures-
Portal user can individually review expenditure reports on utilized funding for the selected budget year to see details of paid items for the overall year

Note: this can be used as a planning tool for budget changes or updates to maximize funds used during future budget years

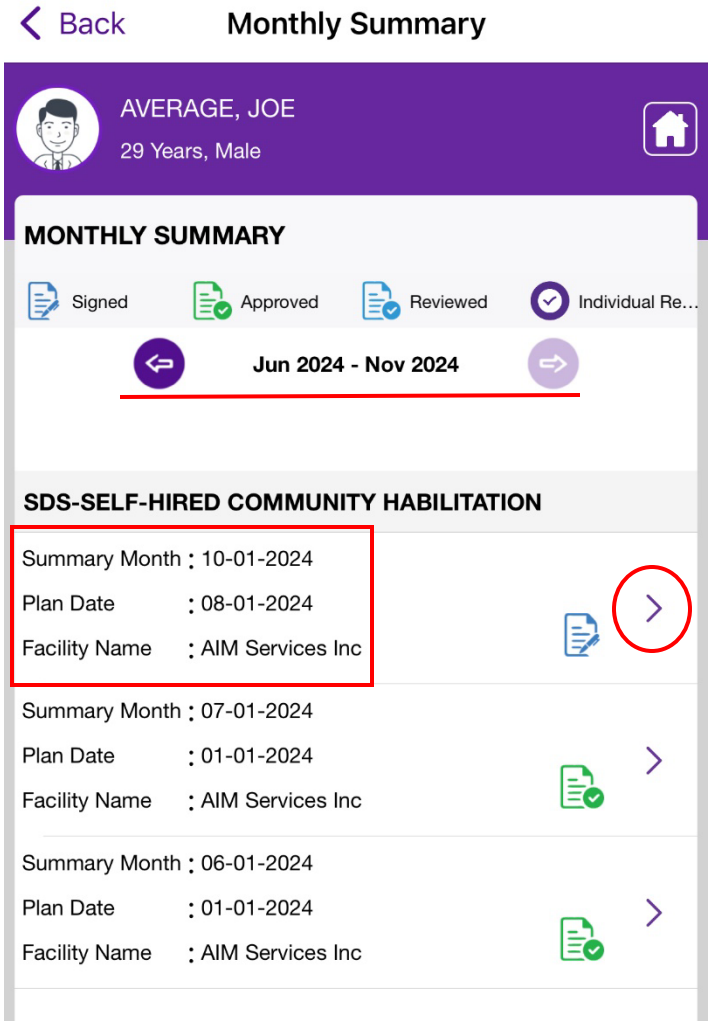


Navigating the SDS **Monthly Summary List**

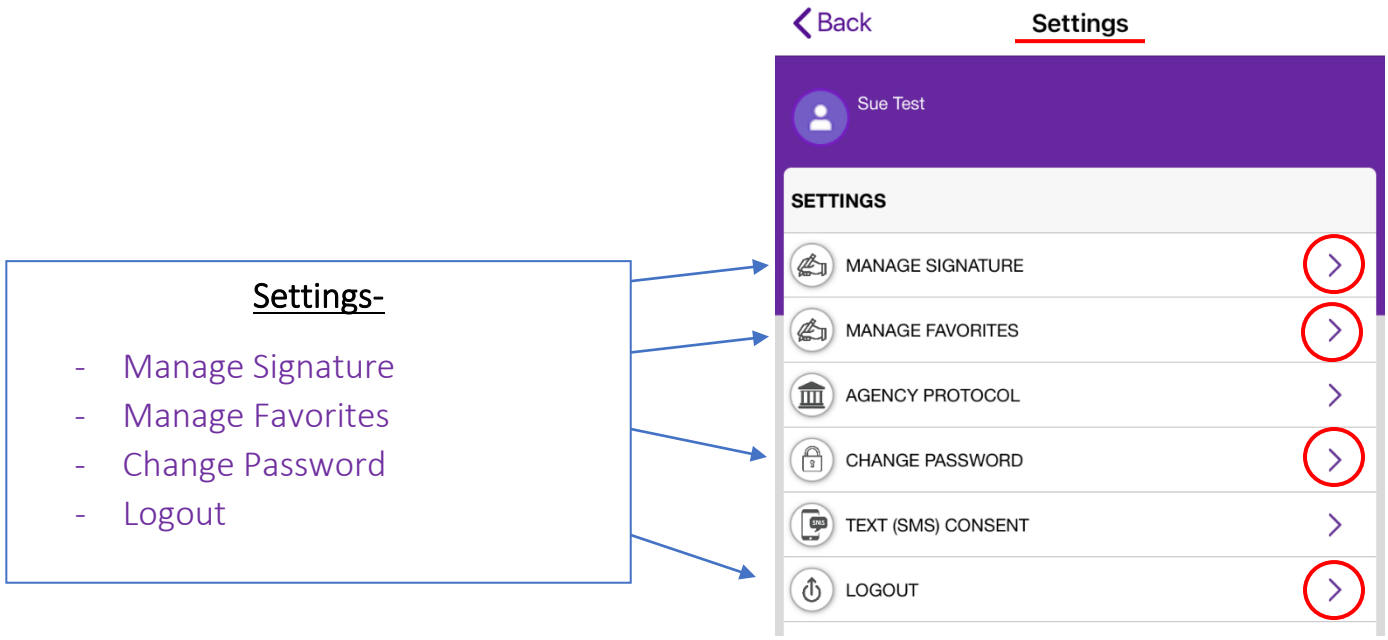
Monthly Summary List navigates to self-hired com hab documentation submitted monthly tied to active staff services and record keeping of previous documents

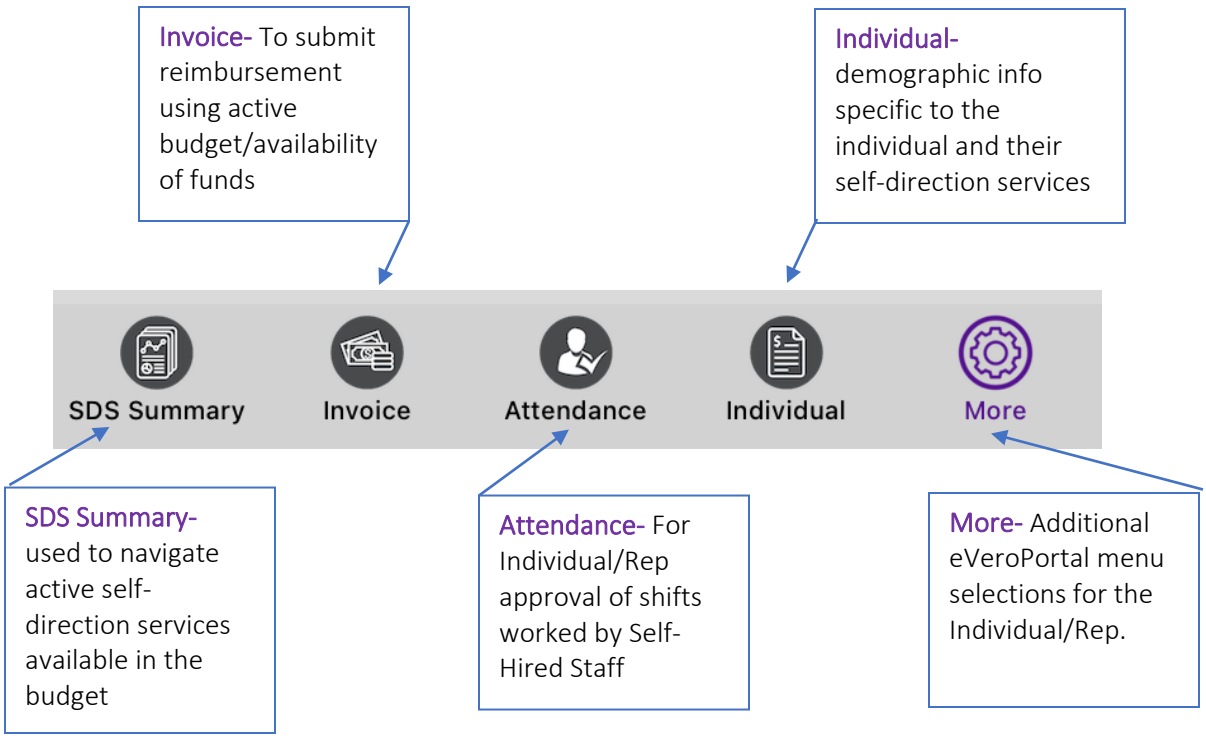
Reviewing Monthly Summaries-
Portal user can individually review summaries by selecting the desired document for details on the staff methods, supports, and services provided by self-hired com hab staff during the month

Note: this can be used as a planning tool for service plan changes or updates to staff methods outlined during person-centered planning



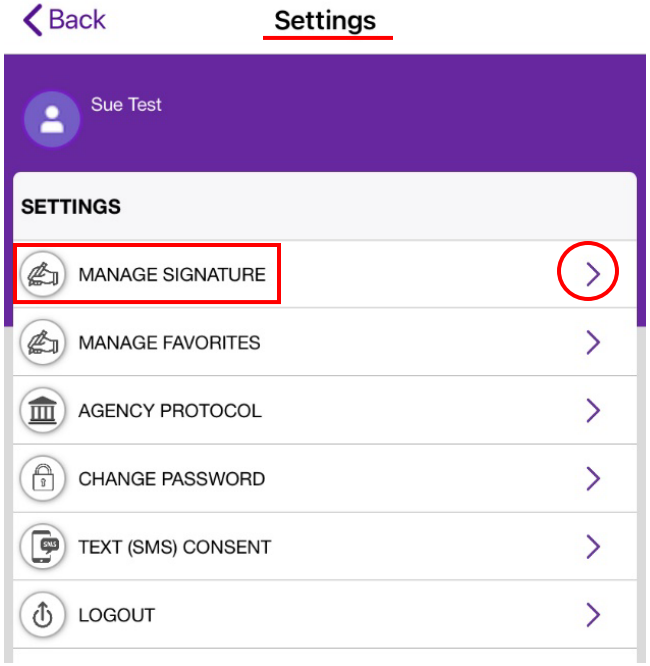
Additional **Settings**





How to **Manage Signature**

Select ‘Manage Signature’ option under settings

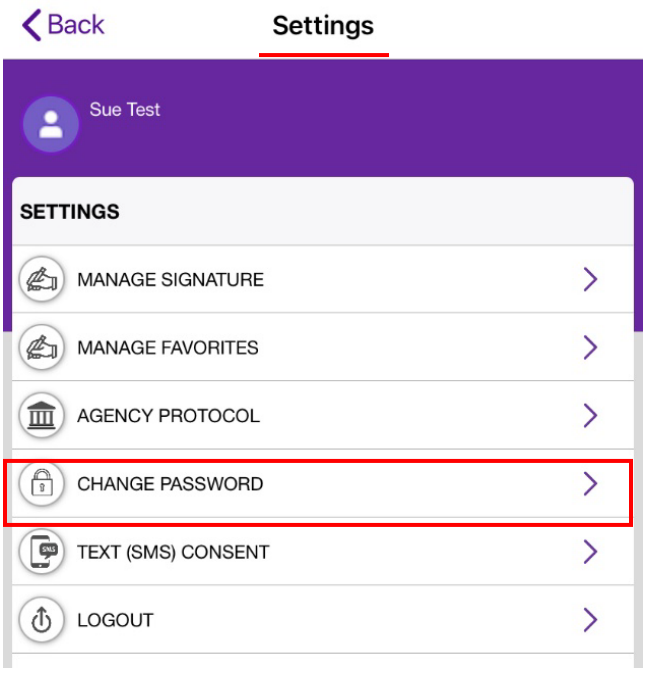


1. Add Signature using the signature pad
2. Select ‘Save’ to save signature
3. To cancel select ‘Cancel’

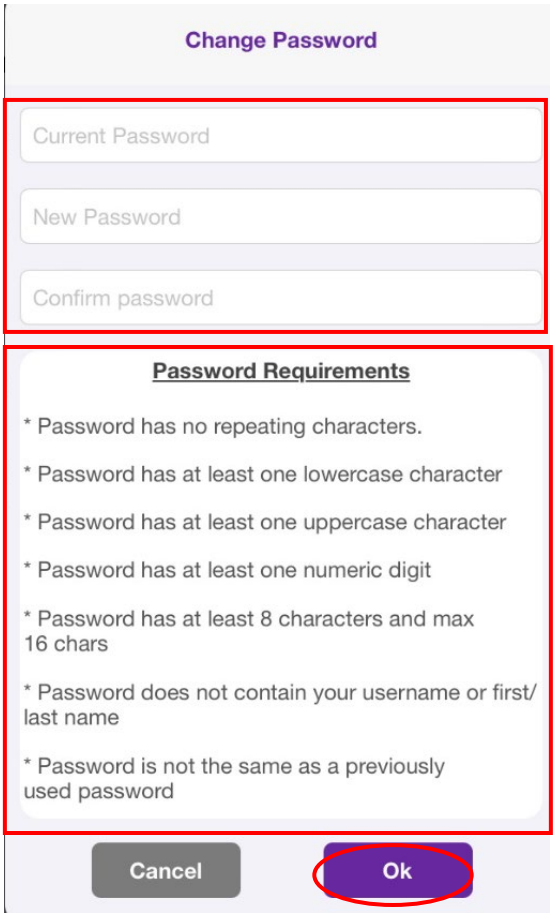


How to **Change Password**

Select 'Change Password' option under settings



1. Enter Current Password
2. Enter New Password
3. Confirm New Password
4. Select 'Ok' (bottom right-hand corner)



Please Note:

Password requirements must be met to move forward

How to **Log Out**

Select ‘Log Out’ option under settings

Answer prompt by selecting ‘YES’ (bottom right-hand corner) to fully log out

