Broker Billing Approval for Individuals-Representatives

eVeroPortal App and Web

Billing Information and AIM Policies

Broker Agreements Brokers use this agreement to submit service documentation which is invoiced against the self-direction budget for broker supports/services to be paid in accordance with AIM Reimbursement Policy

- Only supports and services outlined in the current broker agreement can be submitted for payment
- If services are not outlined in the broker agreement invoices submitted will be rejected by the AIM team processing broker service documentation

Service Documentation Brokers will provide supports/services throughout the budget year with collaboration from the self-directing person/designee to maintain self-direction compliance. Brokers will then include comprehensive and quality person-centered service details in invoice submissions which directly relate to the self-directing person's diverse personal outcomes

- The hourly rates/annual dollar amount outlined in the contracted agreement must be reflected in the current active self-direction budget

Quality Notes Brokers will include important details of supports/services provided which directly relate to the self-directing person's wants and needs. Quality broker service documentation is submitted to outline comprehensive person-centered service descriptions to further justify billing against the self-direction budget

Self-Direction Broker Support AIM team acts as a filter for programmatic balance and agency policy as well as the main point of contact for brokers. Areas of support include but are not limited to AIM policies/practices, reviewing criteria for broker billing in accordance with AIM Reimbursement Policy, and additional required documentation in relation to broker services in accordance with NYS OPWDD Self-Direction Program

Self-Direction Broker Support Coordinators: brokerinfo@aimservicesinc.org

- Assists with processing broker clearance, general broker supports, maintaining broker billing, and additional team supports as needed

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

AIM Self-Direction Team

- Self-Direction Coordinator- Assists with general team communications, documentation, eVero questions
- 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

Note: this document is designed to show individuals, families, and advocates how to review/approve broker billing

Note to Representatives:

By approving broker billing in eVero, representatives meet Medicaid standards certifying that broker billing times have taken place and the person-centered service details invoiced against the self-direction budget are accurate to the supports provided by the broker

How to Approve Broker Billing

eVeroPortal App

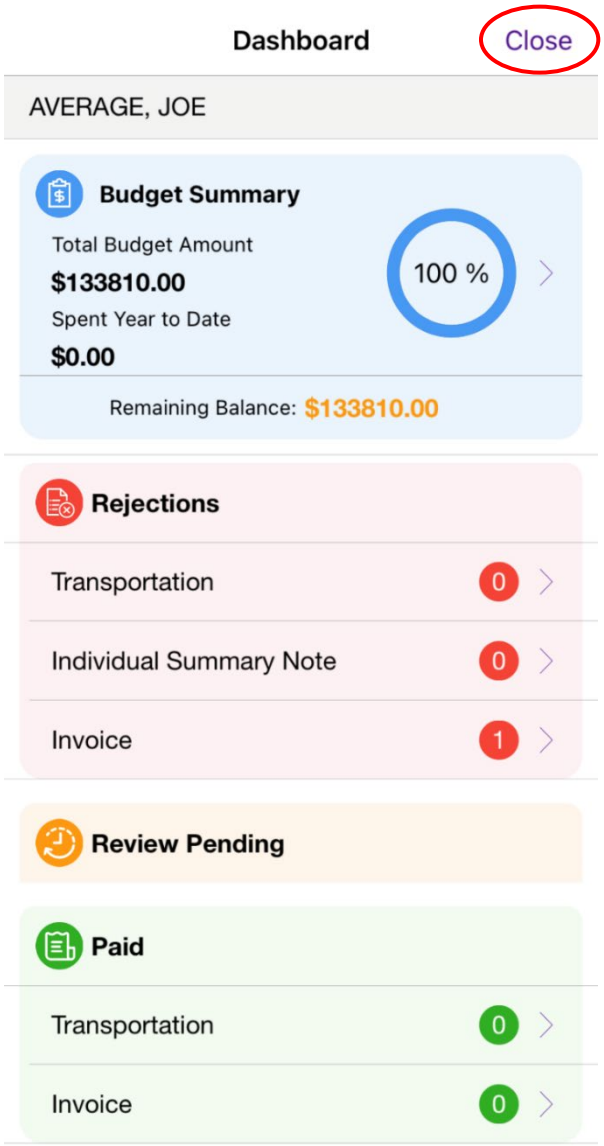
For the App:

1. Log into eVeroPortal
   *Username and Password selected by us
2. Select 'Sign In'

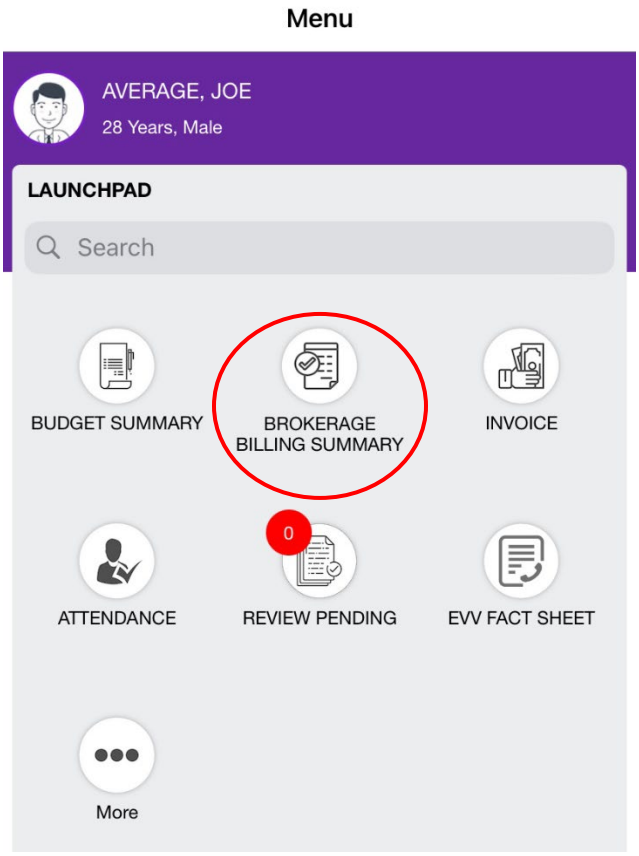


Forgotten User/Password:
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

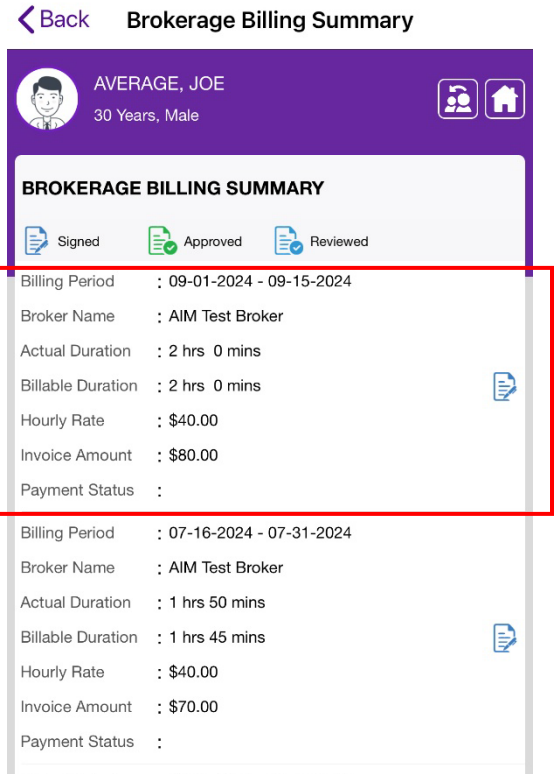
3. eVeroPortal App user will review 'Dashboard' screen and select close



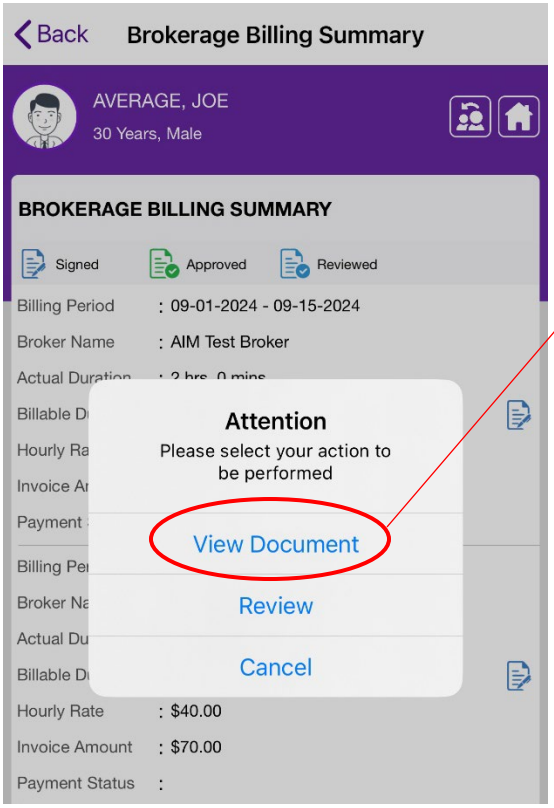
4. Select the broker billing summary widget on the ‘Launchpad’ Menu screen



5. User will select the billing summary period to expand document details

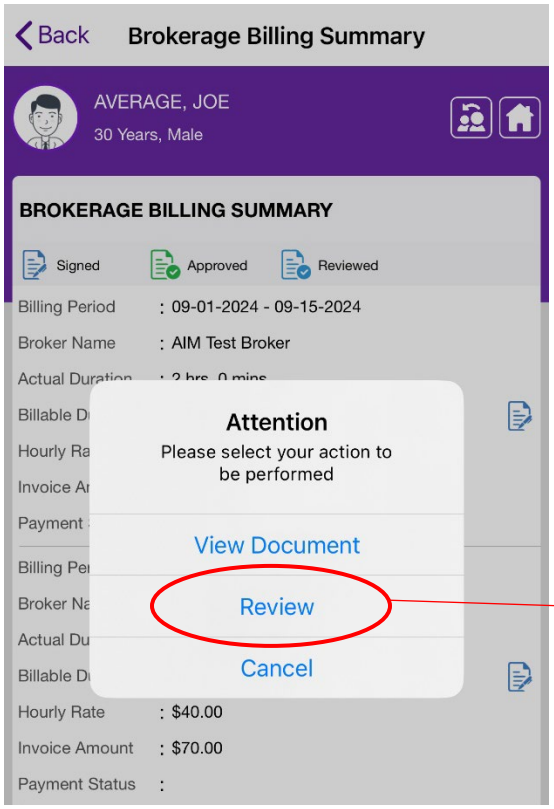


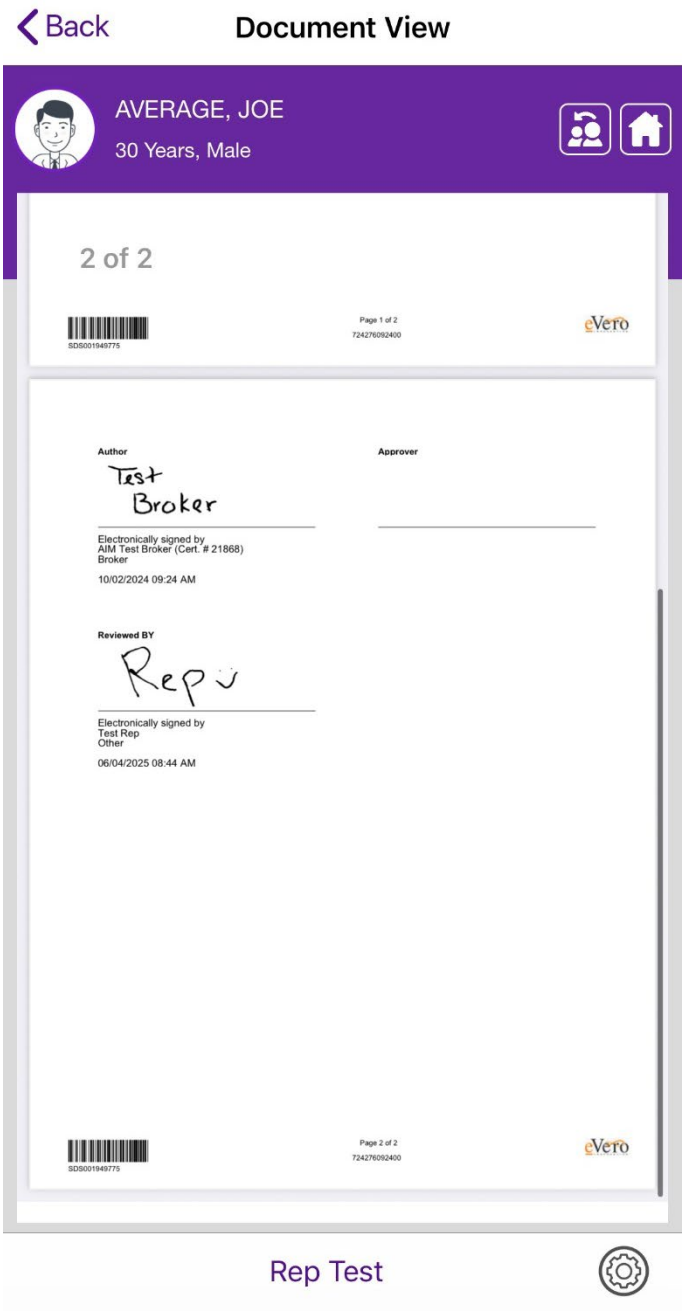
6. User will select ‘View Document’ to read details of billing summary period





7. User will select ‘Review’ to add signature and timestamp to document indicating representative-designee approval





<u>Please note signature will need to be created to successfully review documents</u>

How to Approve Broker Billing

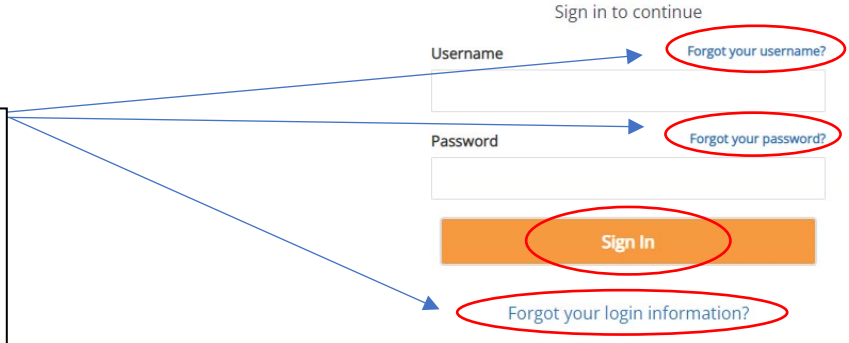
eVeroPortal **Web**

For the Website:

1. Log into eVeroPortal at signin.evero.com
   *Username and Password selected by user

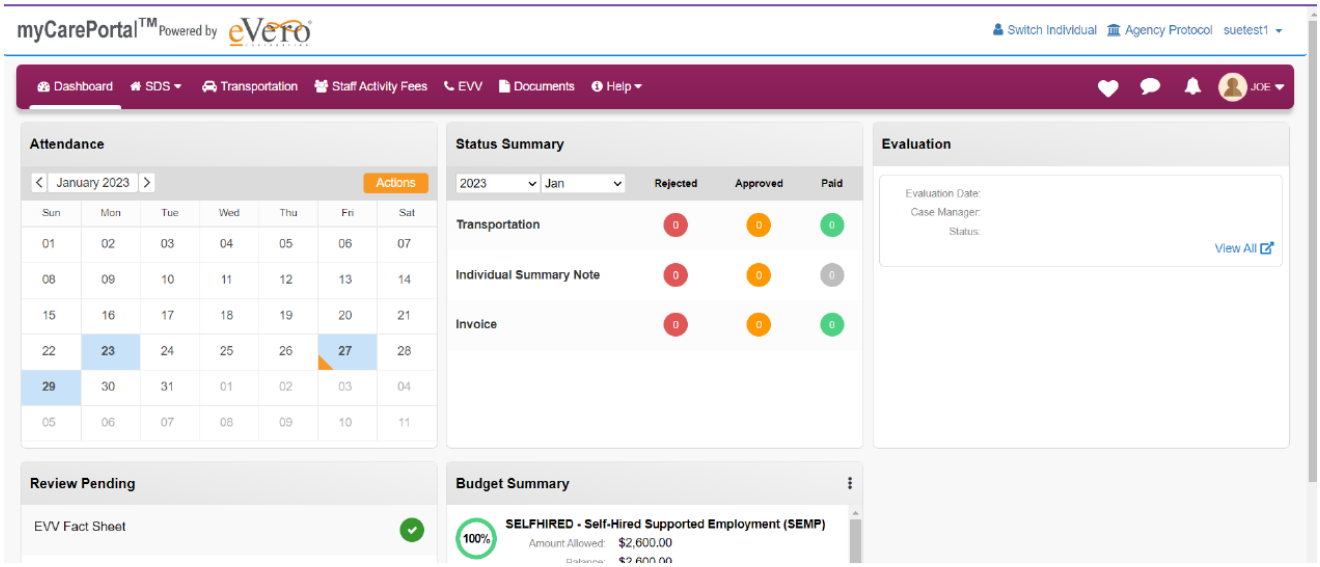


2. Select 'Sign In'

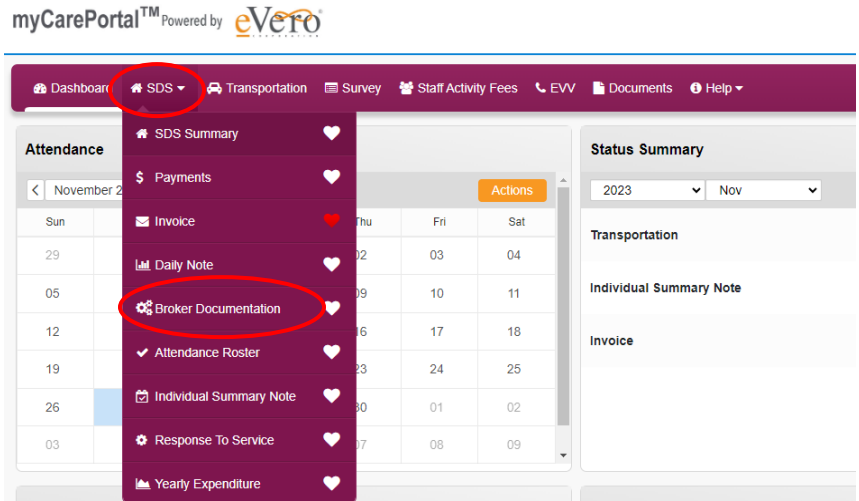


Forgotten User/Password:
Select 'Forgot your username' or 'Forgot your password' or 'Forgot your login information' (blue hyperlinks on right-hand side or bottom center) and follow onscreen instructions for Username or Password

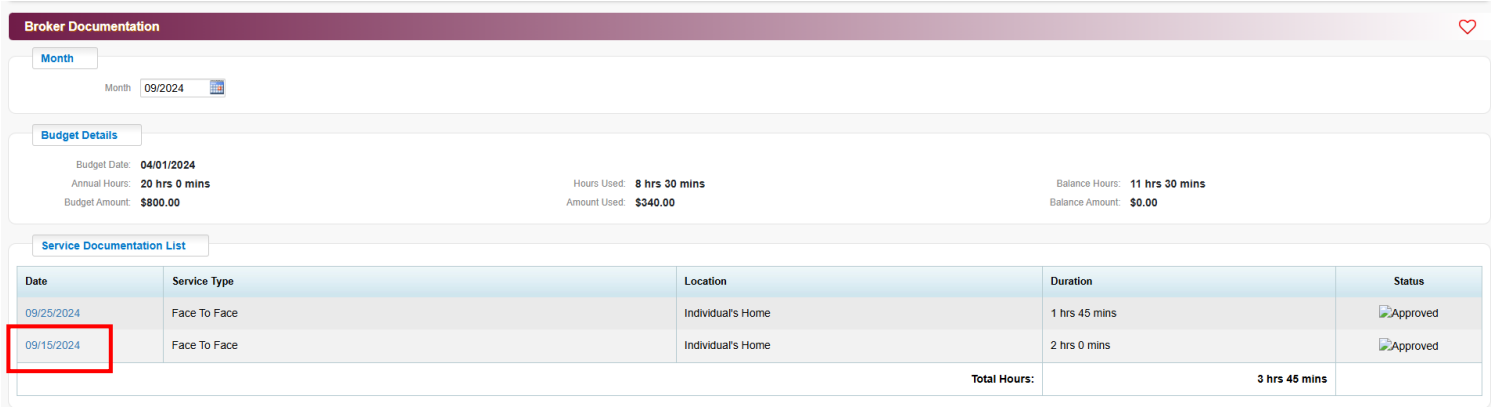
3. Once signed in, the user will be shown the account dashboard page



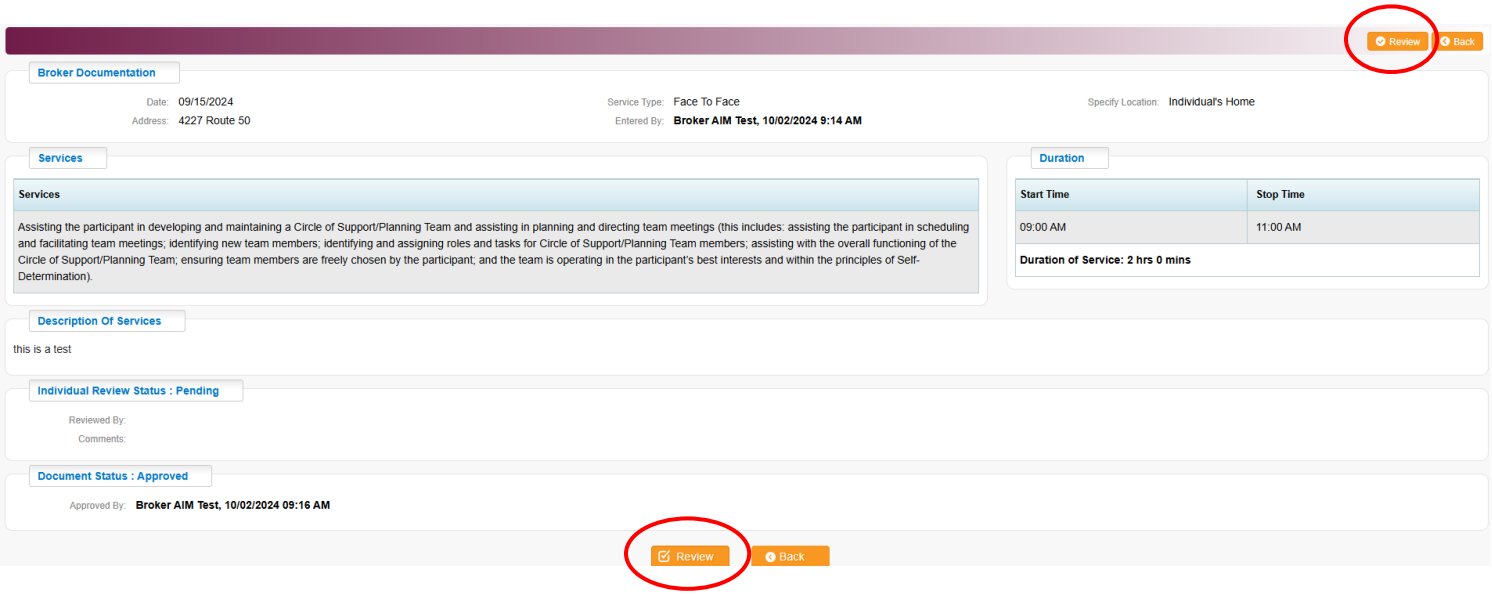
4. Select 'SDS' Dropdown
5. Select 'Broker Documentation' to review and approve broker billing summaries



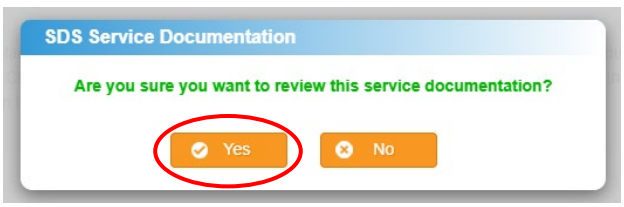
6. In broker documentation user will select the date of broker billing summary intended for review



7. User will read details of broker billing summary period
8. User will select 'Review' to add signature and timestamp to document indicating representative-designee approval (top righthand corner or bottom of screen)

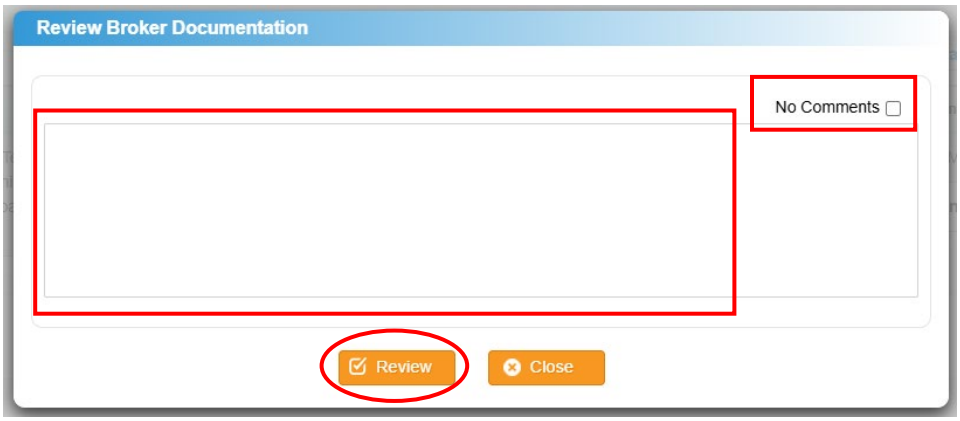


9. User will select 'Yes' confirming review of service documentation

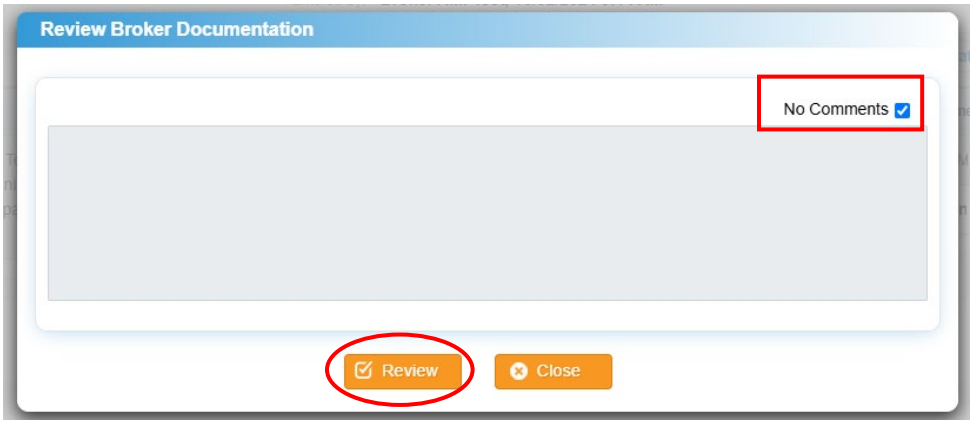


10. User will have two options:
    a. Review with Comments- uncheck the 'No Comments' box to free type additional details
    b. Review with No Comments- keep the 'No Comments' box checked to move forward without additional details
11. User will select 'Review' to add signature and timestamp to document indicating representative-designee approval

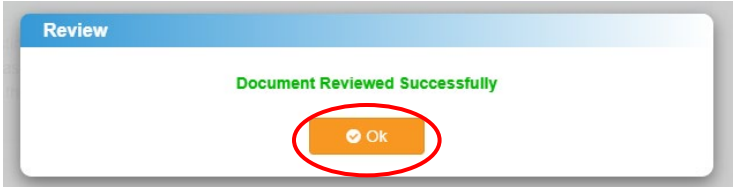
A:



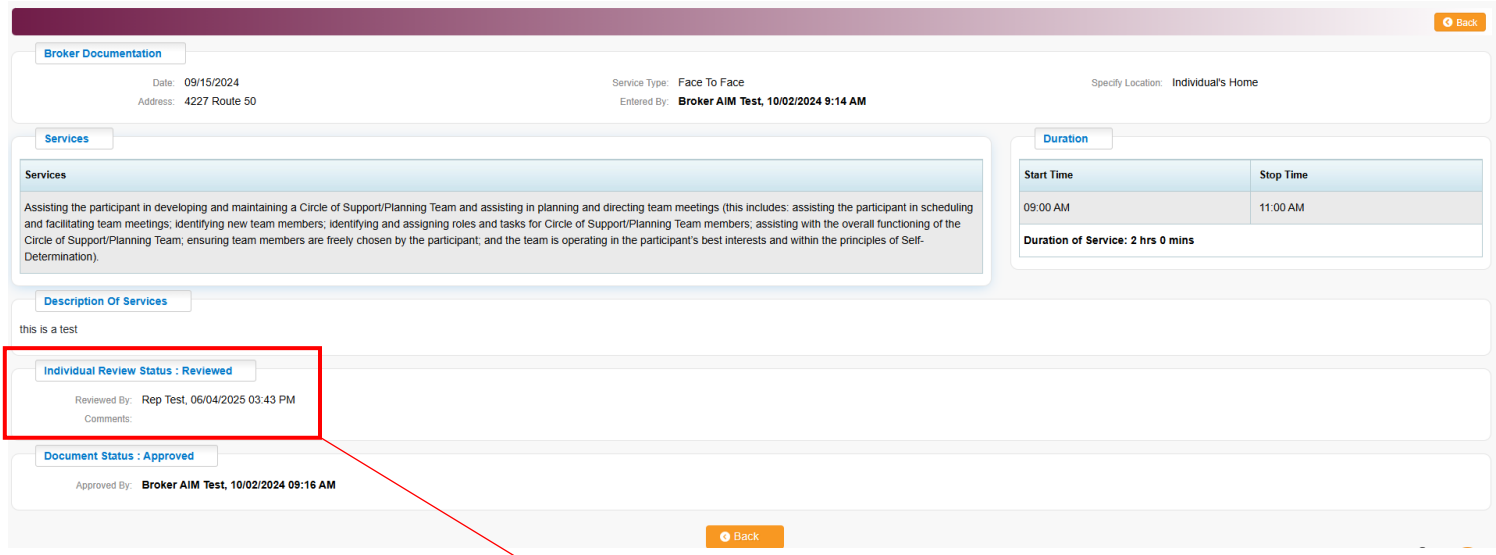
B:

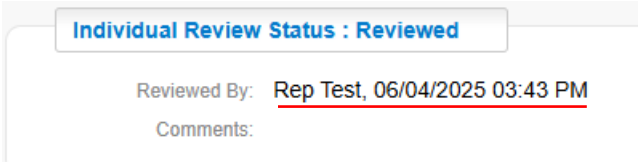


12. User will select 'OK' to complete the review process



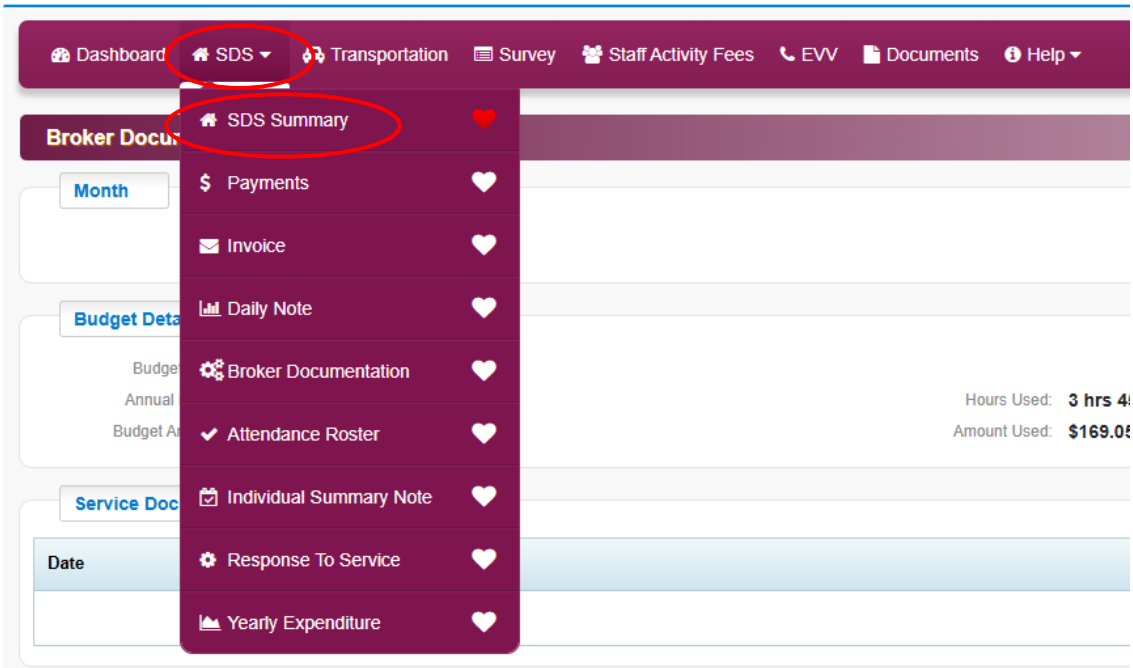
13. User will see timestamp populate in ‘Individual Review’ section of broker documentation





To Navigate to SDS Budget Summary to view broker billing document:

1. User will select ‘SDS’ Menu
2. User will Select ‘SDS Summary’

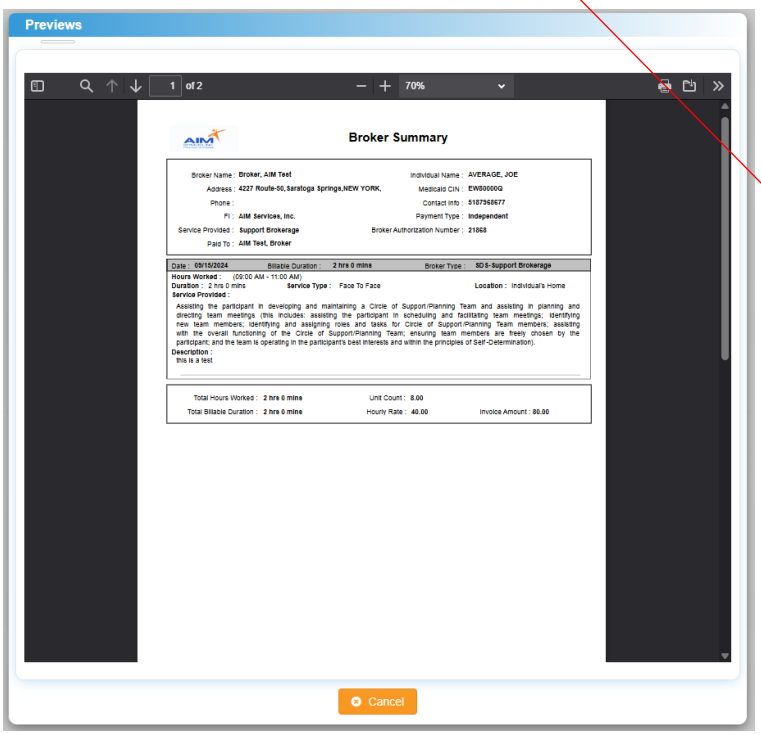


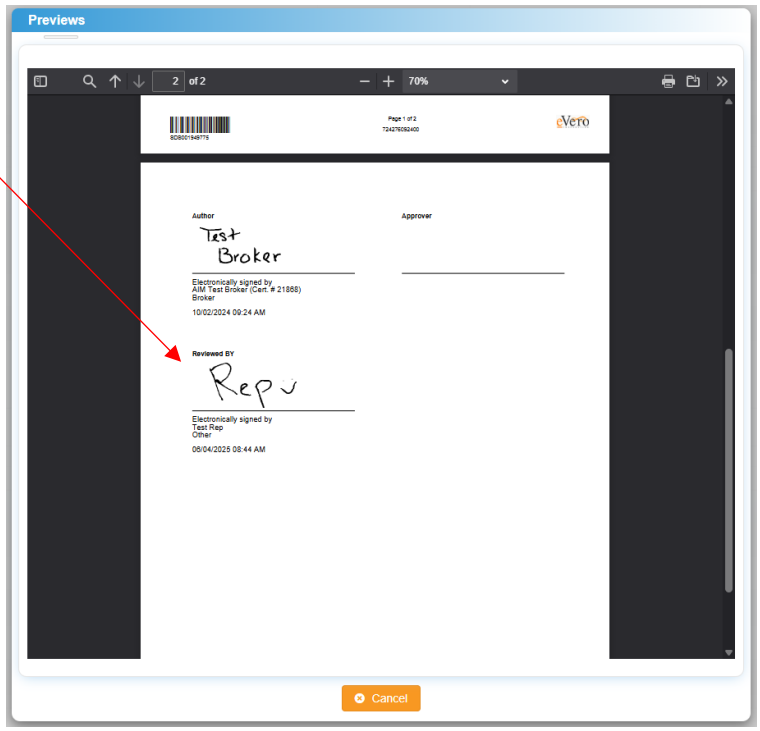
3. Navigate to the bottom of ‘SDS Summary’ page to select Billing Summary Period (individual review can be seen briefly)

Brokerage Billing Summary

Billing Period	Broker Name	Actual Duration	Billable Duration	Hourly Rate	Invoice Amount	Payment Status	Summary Status	Individual Reveiwed
05/16/2025- 05/31/2025	Broker AIM Test	2 hrs 15 mins	2 hrs 15 mins	$45.08	$101.43			
05/01/2025- 05/15/2025	Broker AIM Test	1 hrs 30 mins	1 hrs 30 mins	$45.08	$67.62			
09/01/2024- 09/15/2024	Broker AIM Test	2 hrs 0 mins	2 hrs 0 mins	$40.00	$80.00			
07/16/2024- 07/31/2024	Broker AIM Test	1 hrs 50 mins	1 hrs 45 mins	$40.00	$70.00			

4. Expanded details show Individual Review and Signature populated on Broker Documentation





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