eBilling system

eBilling Training

For the Vendor

eBilling system

All Users

Log In

1. Click the LAUNCH APPLICATION button.
2. Enter your User ID and Password
3. Click the LOGIN button.
4. If you do not have a User ID please contact your Regional Center.

REMINDER: Please change your password the first time you log in.

All Users

System Information

Quick Facts

- ✓ You will be prompted to change your password every ninety days.
- ✓ After twenty-five minutes of inactivity, you will be logged out of the system. Make sure to save all updates as you are making changes to avoid being logged out of the system and losing your work.


All Users

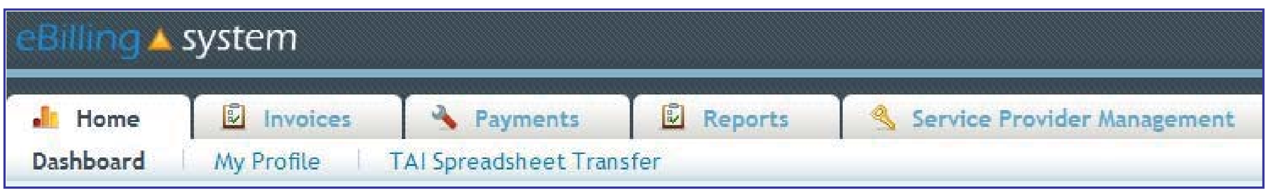
Home Tab

Dashboard

• The eBilling system is arranged in a series of tabs and sub tabs. To move from section to section click on the appropriate tab.

• Functions and tabs are available depending on your user role assignment. If you feel you are not able to access the appropriate areas, please contact your Regional Center and have them update your user role assignment.

• There is a help link in the upper right hand corner of each screen.



All Users

User Roles

Vendor Administrator: Access to the *Home*, *Invoices*, *Payments*, *Reports*, and *Service Provider Management* tabs. The Vendor Administrator role only has access to assigned service provider numbers; can create other vendor user and reader profiles; is able to edit, update, and submit invoices.

Vendor Supervisor: Access to the *Home*, *Invoices*, *Payments*, and *Reports* tabs. The Vendor Supervisor role only has access to assigned service provider numbers; ***can not*** create other user profiles; and is able to edit, update, and submit invoices.

Vendor Staff: Access to the *Home*, *Invoices*, *Payments*, and *Reports* tabs. The Vendor Staff role only has access to assigned service provider numbers; ***can not*** create other user profiles; and is able to edit and update invoices. The Vendor Staff user profile is ***not able*** to submit invoices.

Vendor Staff – No Payment Access: Access to the *Home*, *Invoices*, and *Reports* tabs. The Vendor Staff – No Payment Access role only has access to assigned service provider numbers for invoices and invoice history and not payment history information; ***can not*** create other user profiles; and is able to edit and update invoices. The Vendor Staff – No Payment Access user profile is ***not able*** to submit invoices.

Reader: Access to the *Home*, *Invoices*, *Payments*, and *Reports* tabs. The Reader is only able to view information for assigned service provider numbers. The Reader is unable to update, delete, or submit invoices. The Reader is unable to create other user profiles.

If you feel that you have been assigned the incorrect role, please contact your Vendor Administrator or Regional Center.

All Users

Home Tab

My Profile

How to Update Your User Profile

1. Click the My Profile tab.
2. Make the desired changes.
3. Click UPDATE to save the changes.

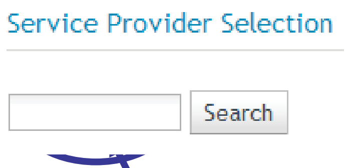
This is the area where you are able to change your password. ***Please remember to reset your password the first time you log into the eBilling system.***

eBilling system

All Users

Home

Dashboard



How to Select a Service Provider Number (SPN)

1. Type your SPN number in the Service Provider Selection search box.
2. Click SELECT.
3. A pop up box will appear. Click OK to approve your selection.

OR

1. Select the appropriate SPN number (by clicking on it once) from the SPN list located under the SPN search box.
2. A pop up box will appear. Click OK to approve your selection.

After selecting an SPN the selected service provider information will appear at the top of the screen.

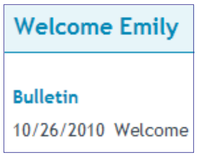
You will be unable to view any information available under the invoices, payments, and reports tabs unless you first select an SPN number.

eBilling system

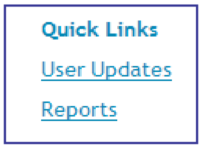
All Users

Home

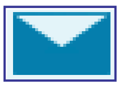
Other Options



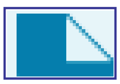
Bulletins are posted by the Regional Centers and will appear on the top left of the home screen.



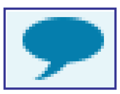
Quick links are available on the home screen and provide one click access to other frequently used areas of the application.



E-Mail icon appears on the upper right corner of the screen and will allow you to send an e-mail to the designated Regional Center contact.



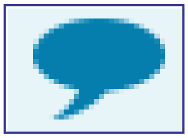
Attach Documents icon appears on the upper right corner of the screen and allows you to upload documents that the Regional Center will then be able to access.



Comments icon appears on the upper right corner of the screen and allows you to enter comments for the Regional Center to read.

All Users

Home



Comments:

• The invoice level comments will be available on the website. Invoice detail line level comments will be transferred to UFS for Regional Center staff to view.

• Invoice detail line level comments are meant to convey important information to POS staff at the Regional Center (ex. This invoice line was deferred because…).

• Will be seen only by POS Regional Center staff.

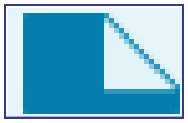
• Should be kept brief (two sentences or less).

•Are not for communication with Service Coordinators.

• Are not an immediate or direct form of communication with the Regional Center. If you have a question or concern that requires an answer from the Regional Center, you need to either call or e-mail your Regional Center contact.

All Users

Home



Documents:

✓ Attached documents will only be flagged on Regional Center reports if they are attached to specific invoice detail lines.

✓Documents attached at the invoice level will not appear on Regional Center reports.

✓If you would like Regional Centers to know that you have attached a document to your invoice, it must be attached to an invoice detail line.

Vendor Administrator

Service Provider Management

Users

Only users assigned to the Vendor Administrator role will have access to the Service Provider Management tab.

This is the area where Vendor Administrators will be able to:

- ✓ Search for Users
- ✓ Maintain User Profiles
- ✓ Create New User Profiles
- ✓ Assign Roles to Users
- ✓ Assign SPNs to Users

Vendor Administrator

Service Provider Management

Users

How to do a Quick Search for Users

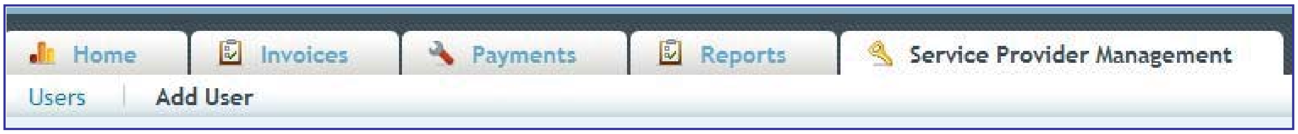
1. Select the Service Provider Management tab.
2. Click the Users sub tab.
3. Enter the search criteria. To view all users leave the search criteria blank.
4. Click SEARCH.
5. The results will display on the bottom half of the screen.
6. Click the record to view. Click the EDIT button on the right of the record line to edit/update.

Vendor Administrator

Service Provider Management

Users

How to Create New User Profiles



1. Select the Service Provider Management tab.
2. Click the Add Users sub tab.
3. Enter the new user profile information. Fields with a red star are required. The user role defaults to reader. Choose a new user role from the drop down menu if necessary.
4. Click ADD.
5. Click the ASSIGN SPN button to assign SPNs at this time.

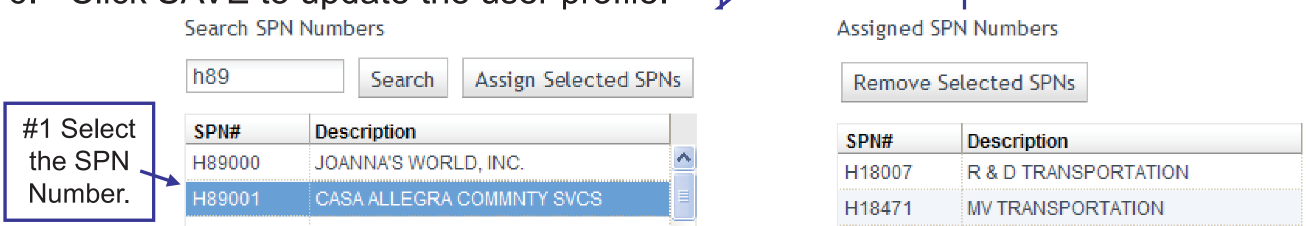
Vendor Administrator

Service Provider Management

Users

How to Assign SPNs

1. Click the Assign SPN button. This will be available if you are viewing a user profile in the edit/update mode or are creating a new user profile.
2. A pop up window will appear.
3. Search for the appropriate SPN on the left side of the screen.
4. Click the SPN to highlight and select. Hold down the CTRL key to select multiple, non-consecutive SPN’s. Hold the shift key to select multiple, consecutive SPN’s.
5. Click the ASSIGN SELECT SPN button.
6. Click SAVE to update the user profile.



Invoices

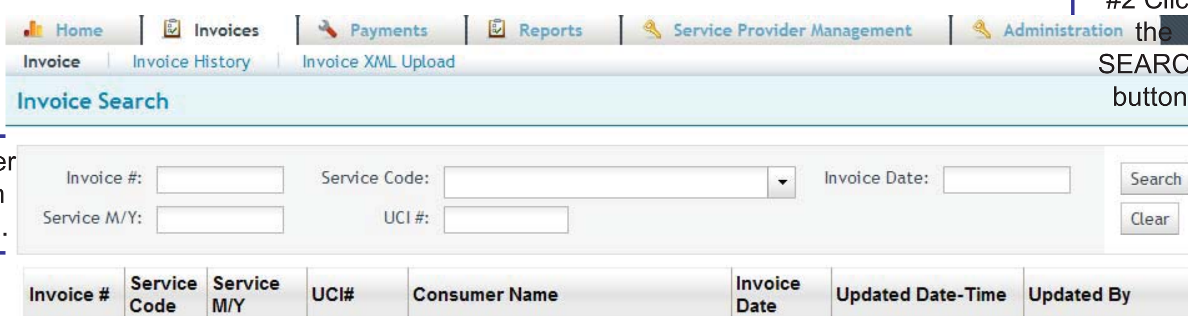
Invoice

How to Search for an Invoice

1. Select or enter the appropriate service provider number on the home screen.
2. Select the Invoices tab. ***TIP: If you would like to search for an invoice that has been submitted select the Invoice History tab.***
3. Enter the search criteria. If you would like to pull up all available invoices then leave the search criteria blank.
4. Click the SEARCH button.
5. The search summary results will appear on the bottom half of the screen.

#2 Click the SEARCH button.

#1 Enter search criteria.



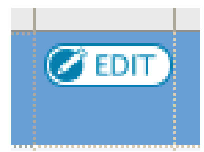
eBilling system

Invoices

Invoice

How to View an Invoice

1. Search for the invoice you would like to view.
2. Click the invoice.
3. You will now be able to view the invoice detail lines in VIEW ONLY mode.
4. To view an invoice in EDIT/UPDATE mode you will need to click the EDIT button on the right side of the invoice line.



Click anywhere on the invoice line to view in VIEW ONLY MODE.

Invoice #	Service Code	Service M/Y	UCI#	Consumer Name	Invoice Date
0606066	896	08/2010	0000000	XXXX, ANGELINE	2010-08-16

Click the EDIT button to view in EDIT/UPDATE mode. The EDIT button is on the right side of the invoice line.

eBilling system

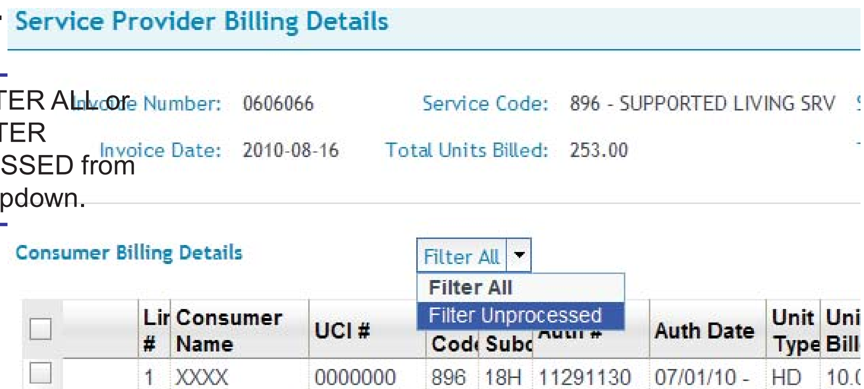
Invoices

Invoice

How to Filter Invoice Lines

1. Select the invoice you would like to view or update/edit.
2. Choose FILTER ALL or FILTER UNPROCESSED from the drop down in the top middle of the screen.
3. FILTER ALL will allow you to see all the invoice lines.
4. FILTER UNPROCESSED will allow you to only see the unprocessed invoice lines.

Select FILTER ALL or FILTER UNPROCESSED from the dropdown.



Invoices

Invoice

Calendar Type Differences

There are now four calendar types. If you think your calendar type is incorrect, please contact your Regional Center.

Type of Calendar	Service Type
Check Box	Monthly
Units Calendar	Non-Monthly
Units with In and Out Times and Worker Name	Hourly, Session, or Visit
Purchase Reimbursement	Per Item or Variable

Invoices

eBilling system

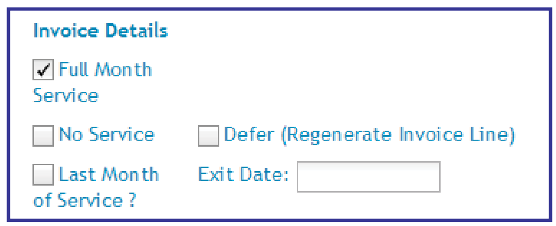
Invoice

Monthly Check Box Calendar

The check box calendar type has boxes that are selected with a cursor and are filled with a check mark.

1. Place your cursor in the check box.
2. Click on the check box.
3. A check mark will appear selecting the appropriate day.
4. To populate all days of the month click SELECT ALL button.
5. To unselect all days of the month, click the DE-SELECT ALL button.
6. Click the UPDATE or UPDATE NEXT button to save your changes.

TIP: On the right side of the screen you can mark an invoice line as Full Month of Service, No Service, Defer, or Last Month of Service.

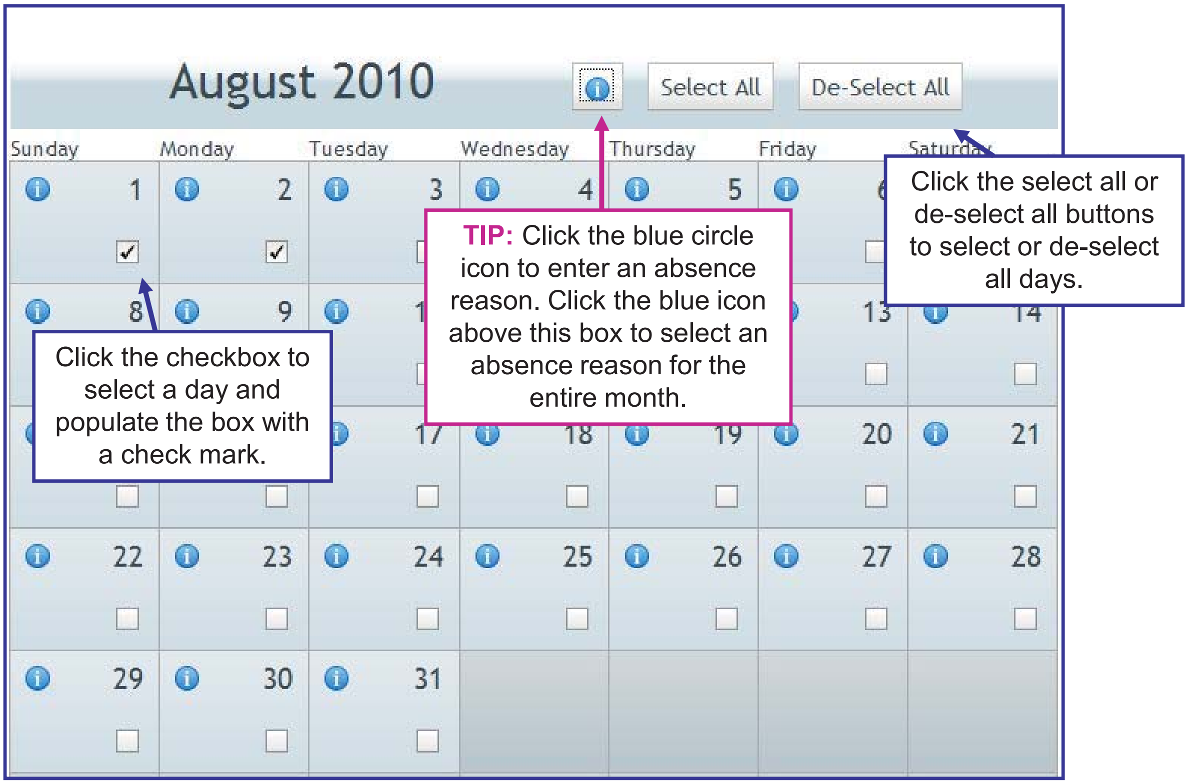


eBilling system

Invoices

Invoice

Monthly Check Box Calendar



Invoices

eBilling system

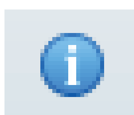
Invoice

Absences and Absence Reasons

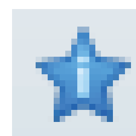
On the Checkbox type calendar you have the option of entering an absence for consumers. You must be viewing the invoice detail line in the EDIT/UPDATE mode.

1. Click on the Blue Circle “I” icon. TIP: To apply an absence reason to the entire month make sure you select the icon at the top of the calendar. To apply an absence reason to individual day make sure to choose the icon on the day you would like to report the absence.
2. Select an absence reason from the drop down menu. Click OK.
3. The Blue Circle “I” icons will turn into blue stars for all days with reported absences. Click the UPDATE button to save changes.

Click this icon to report a consumer absence. →



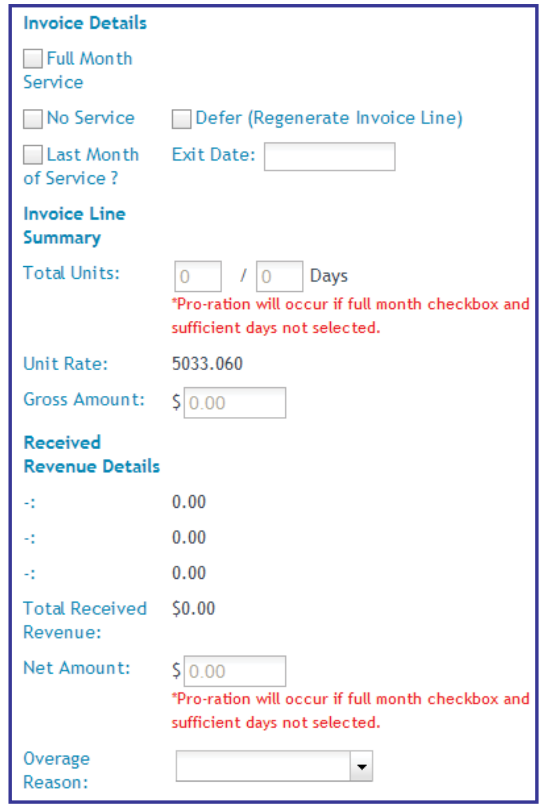
After the absence is reported the circle will change into a star. →



Invoices

Invoice

Monthly Check Box Calendar



In the following cases the payment will need to be prorated:

- ✓ The authorization starts or stops mid-month
- ✓ The last exit date is prior to the last day of the month
- ✓ The consumer is absent from the facility greater than fourteen days during the month.

NOTE: For residential services, if a consumer exits the facility during the month, please enter the last night of service as the exit date.

A prorated payment will show as zero and the Regional Center will calculate the payment based on attendance.

Invoices

Invoice

Units Calendar

The unit type calendar has boxes that will accept unit of service entries.

1. Place you cursor in the unit box.
2. Enter the number of units. You may enter a number with up to two decimal points. ***TIP: Break hours into quarter increments (ex. .25, .50, and .75)***
3. To populate all days of the month click the POPULATE ALL button.
4. Select the weekday's only check box if you would like to populate only weekdays (Monday through Friday).
5. Enter the appropriate number of units.
6. Click OK.
7. The calendar will be populated.
8. You can use the mouse or the tab key to move to each unit entry box on the calendar.
9. Enter or edit units directly in the attendance calendar entry box.
10. Click the UPDATE or UPDATE NEXT button to save your changes.

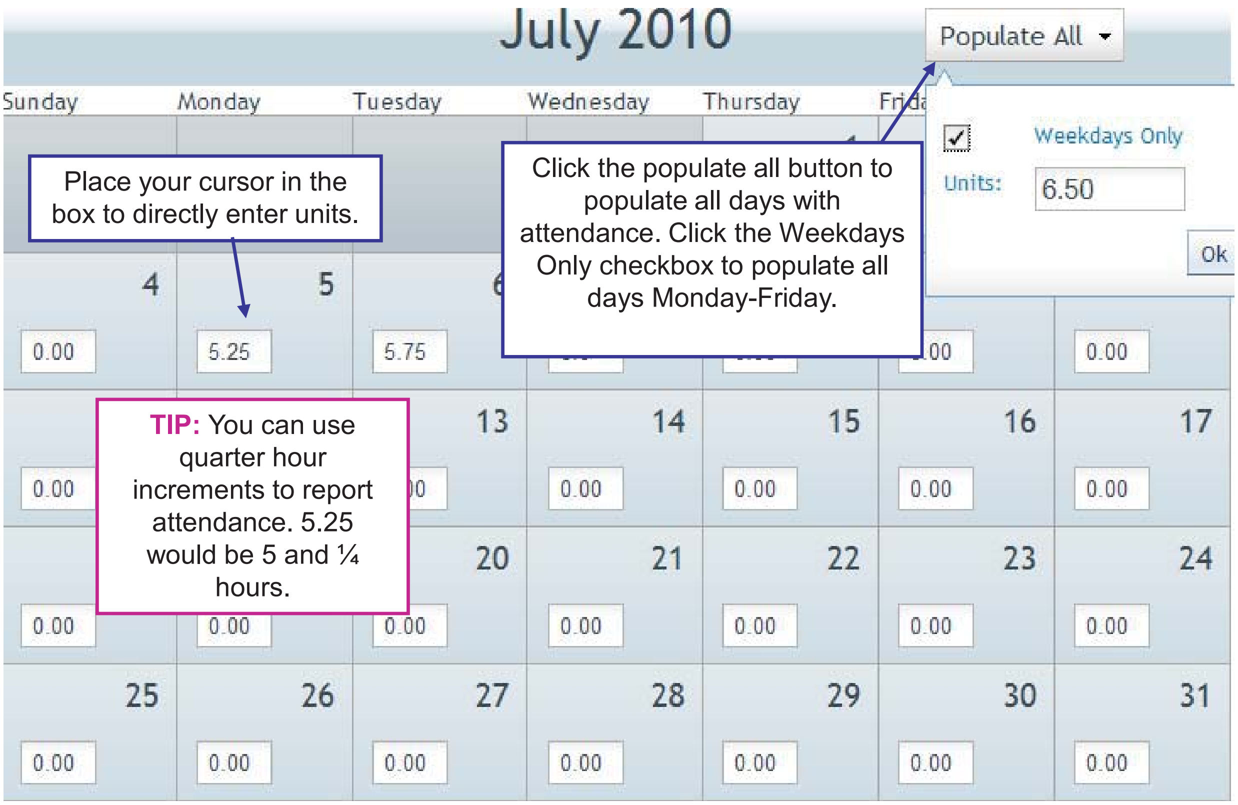
Invoices

eBilling system

TIP: Use the TAB key to move from day to day on the calendar.

Invoice

Units Calendar



Defer

No Service

Invoices

Invoice

eBilling system

Using the No Service or Defer Buttons

1. Click on an invoice EDIT button. You must be in invoice edit/update mode.
2. Select lines you would like to apply the button to by clicking in the check boxes on the left. ***TIP: To apply a mass update button to all invoice lines select the top left checkbox that is on the header line. This will mark all the invoice lines for update.***
3. Click on the button (NO SERVICE or DEFER) you would like to use.
4. A flag will appear in the appropriate column.

☐	Lir #	Consumer Name	UCI #	SVC Code	SVC Subc	Auth #	Auth Date	Unit Type	Unit Bill	Days Attend	Gross Amount	Net Amoun	No Ser	Defe
		JOSEPHINE					05/31/12							
☐	5	XXXX AMY	0000000	896	35H	11296795	07/01/10 - 09/30/10	HD		0				Y
☐	6	XXXX AMY	0000000	896	5H	11301224	07/01/10 - 09/30/10	HD		0			Y	

Click this checkbox to select all invoice lines for update. Otherwise select the checkboxes on the individual consumer lines.

After the records have been updated, they will be marked with the appropriate flags.

Invoices

Invoice

Printing Invoice Details

You can print invoice details from the view only or edit/update modes. Select the invoice you would like to print.

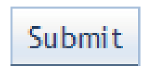
1. Click the PRINT INVOICE DETAILS button. It is located in the bottom right area of the screen.
2. A pop up window will appear.
3. You are able to view, save, or print the INVOICE DETAIL REPORT
4. You are also able to print invoice details for submitted invoices by searching under the Invoice History tab.

Invoices

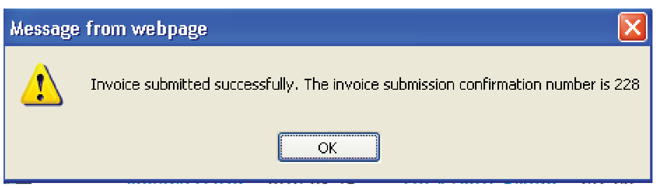
Invoice

How To Submit an Invoice

1. View the invoice you would like to submit in EDIT/UPDATE mode.
2. Check each invoice line to make sure that it has been updated with the correct information.
3. Scroll down to the bottom of the screen
4. Click the SUBMIT button.
5. A pop up window will appear. Click OK.
6. Your invoice has been submitted.



#1 Click SUBMIT.



#2 Click OK.

Invoices

Invoice History

Brief Description of Invoice History

✓Once your invoice has been submitted you will be able to search for it under the Invoice History sub tab.

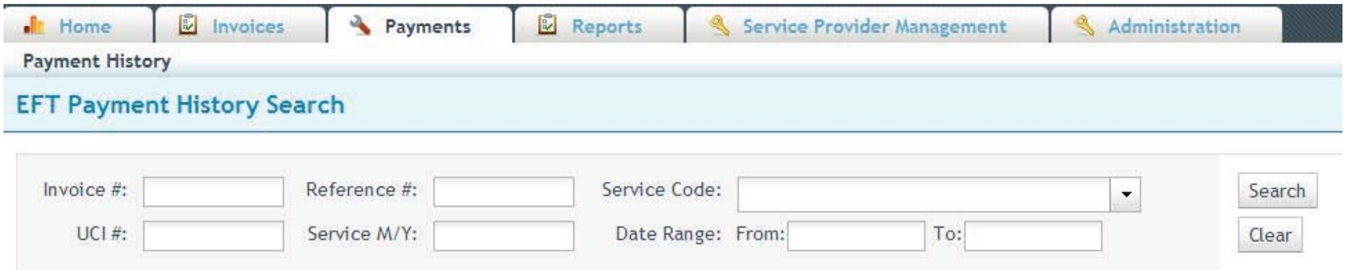
✓You must choose an SPN number on the Home tab to view the Invoice History sub tab.

✓You are able to print invoice details from the Invoice History sub tab.

<u>Payments</u>

Payment History

EFT Payment History Search



✓ You are able to search EFT Payment History in the same way that you search for available invoices under the <u>Invoices</u> tab. Just choose the <u>Payments</u> tab, enter search criteria, and click the SEARCH button.

✓To view a selected EFT Payment History for an invoice, click anywhere on the invoice line.

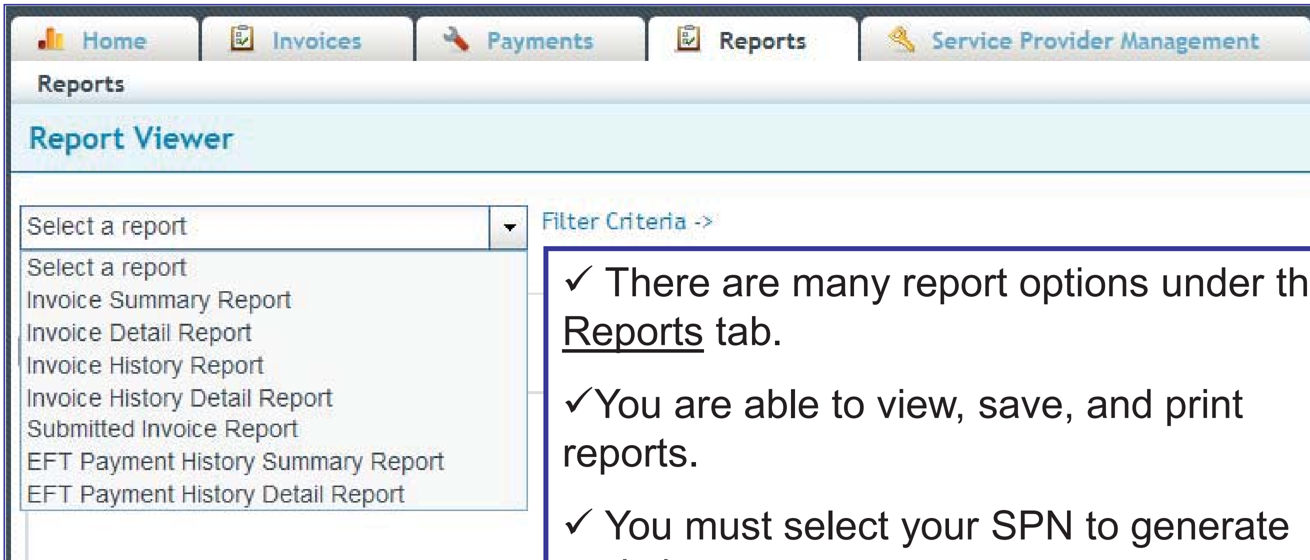
✓ To create a .CSV file of the Payment History, select the invoice, and click the CREATE CSV button. You can either view the file or save it to your computer.

Reports

eBilling system

Reports

Overview



✓ There are many report options under the <u>Reports</u> tab.

✓You are able to view, save, and print reports.

✓ You must select your SPN to generate and view reports.

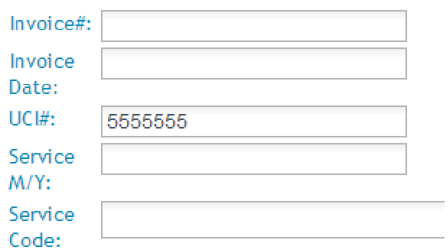
Reports

Reports

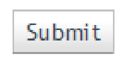
How to Generate a Report

1. Click the Reports tab. (Make sure you have selected the appropriate SPN).
2. Choose a report from the drop down menu on the left.
3. Enter the appropriate search criteria on the right hand side of the screen. (The search criteria will changed depending upon the report you've selected).
4. Click SUBMIT.

#1 Choose Report.



#2 Enter Search Criteria.



#3 Click Submit.

eBilling system

Reports

Reports

Viewing and Printing Options

There are several options for viewing your report.

1. You can either print the report or save it to your computer.

Click this icon to print the report.

Click this icon to save the report to your computer.

2. You can open the report in a new window by clicking the Open in a New Window link that is located on the left side of the screen.

3. You can also use the scrollbar to view the report in the browser window.