

Yedei Chessed eVero Training

Participant/Designee Training



How to Get Started

- An email was sent to create an account.
 - Select the orange Join MyeVeroPortal button
- There is a 2-step verification
 - You can choose either a text message or phone call.
 - You will get the text or call as soon as select the Request button, so if you Choose a call make sure to have a pen and paper ready to take down the number.
- Add the security code when prompted.

Welcome Pessy Rosenfeld-Test !


We're so happy you're here!

We created a simple yet powerful way for you to stay at the center of your care. Please join us on the MyeVeroPortal for individuals and families by clicking the button below. We want you to stay connected and in control of everything you're planning.

By the way, this invitation will expire on **11/4/2020** and is being sent to you on behalf of C.T.

[Join MyeVeroPortal](#)

Thanks,
The eVero Team
(and YEDEICHESED)

 Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Request Two Factor Code

Option

Text message to 8454**0***

[Request](#)

Request Two Factor Code

Option

Voice phone call to 8454**0***

[Request](#)

How to Get Started Cont.

- If this is the first time you are using eVero, select New Account
- If you have more than one participant who will be using eVero, such as siblings, and you have already created an account with eVero, select Existing Account



The image shows a user interface for creating or merging an account on eVero. It features two main sections side-by-side. The left section is titled 'New Account' and contains text explaining that users without an existing account can create a new one, with a button labeled 'Click here to create one'. The right section is titled 'Existing Account' and contains text explaining that users with an existing account can merge or support it, with a button labeled 'Click here to merge your credentials'.

New Account

If you do not have an existing account with eVero. We offer an option of creating a new one set of credentials.

[Click here to create one](#)

Existing Account

If you have an existing account with eVero. You can enter your credentials to merge/support them here.

[Click here to merge your credentials](#)

How to Get Started for New Account

- For first time eVero users that have selected, New Account, follow the prompts to fill out the following information:
 - Username
 - 3 security questions
 - Password
- The Personal Details and Email are set and can not be changed.
 - If any changes are needed please reach out to us and we will update the information for you

The screenshot displays a registration form for a new eVero account, organized into three main sections: Personal Details, User Details, and Security Questions. The Personal Details section includes fields for First Name (Pessy), Last Name (Rosenfeld-Test), and Phone (redacted with a yellow bar). The User Details section includes Email (pessy.rosenfeld@yedei.org) and Username. The Security Questions section contains three questions, each with a dropdown menu for the question and a text input for the answer. To the right of these sections is a 'Strong password' section with Password and Confirm Password fields, followed by a list of password requirements: no repeating characters, at least one lowercase character, at least one uppercase character, at least one numeric digit, at least 8 characters and max 16 chars, and no containing the username or first/last name. An orange Submit button is located at the bottom right of the form.

Personal Details

FirstName
Pessy

LastName
Rosenfeld-Test

Phone
[Redacted]

User Details

Email
pessy.rosenfeld@yedei.org

Username
[Empty]

Security Questions

SecurityQuestionOne
What is the name of your most favorite childhood superhero? [Dropdown]

SecurityAnswerOne
[Text Input]

SecurityQuestionTwo
What is the name of your most favorite childhood superhero? [Dropdown]

SecurityAnswerTwo
[Text Input]

SecurityQuestionThree
What is the name of your most favorite childhood superhero? [Dropdown]

SecurityAnswerThree
[Text Input]

Strong password

Password
[Text Input]

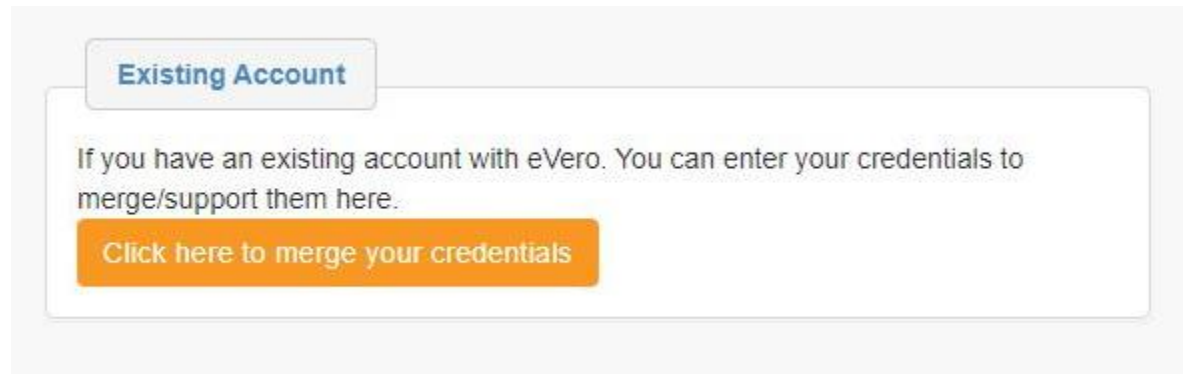
Confirm Password
[Text Input]

Password has no repeating characters
Password has atleast one lowercase character
Password has atleast one uppercase character
Password has atleast one numeric digit
Password has atleast 8 characters and max 16 chars
Password does not contain your username or first/last name

Submit

How to Get Started for Multiple Participants

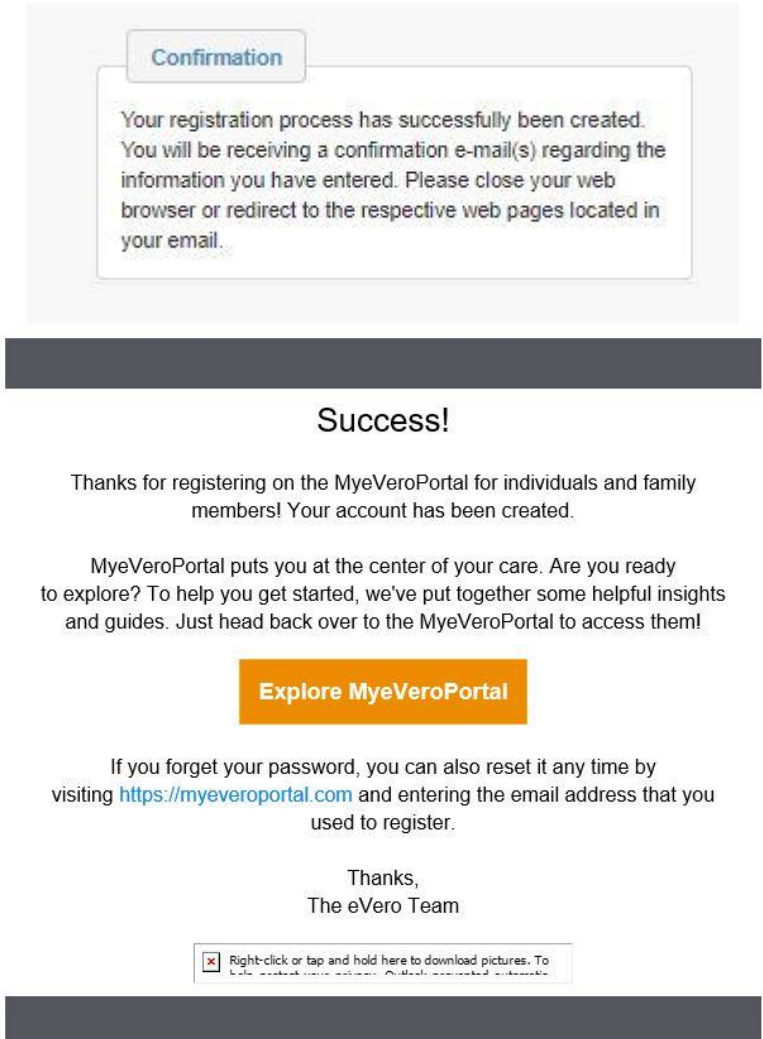
- Instead of having multiple log-Ins, Participant account's can be linked under one Log-In
- Using the link from email regarding the next Participant, select Existing Account to merge Log-In information.



- This can be used for multiple agencies as well.
- Log-In using previous information.

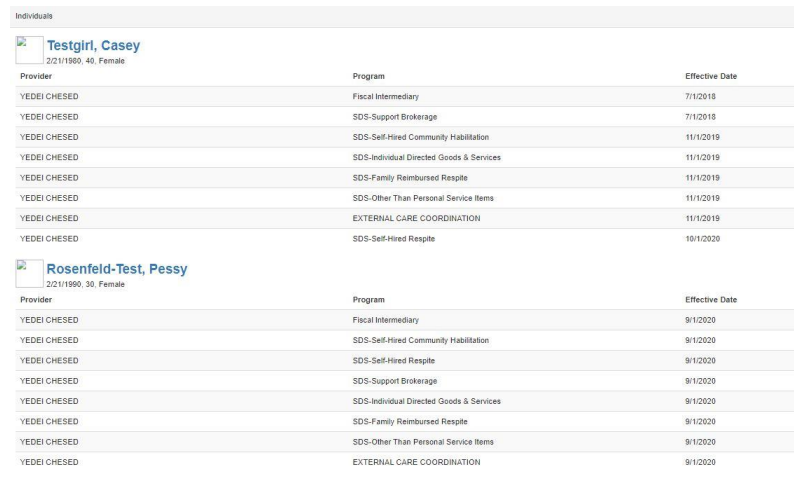
How to Get Started Cont.

- Once you select Submit, a confirmation screen will appear.
- An email will then be sent confirming your connection with the Participant.
- Select the orange Explore MyeVeroPortal.
 - This will direct you to myeveroportal.com
- Using the Username and Password created, you can now log on to eVero.
 - On the first Log-In the End user Services Agreement will need to be agreed to.



Dashboard for Multiple Participants

- If the account has access to multiple Participants linked, they will all show up on the first screen.
 - It will display the Provider, Program, and Effective date according to the budget..



The screenshot displays a dashboard for two participants. Each participant's section includes a header with their name and a table of services. The services table has three columns: Provider, Program, and Effective Date.

Participant	Provider	Program	Effective Date
Testgirl, Casey 2/21/1990, 40, Female	YEDEI CHESD	Fiscal Intermediary	7/1/2018
	YEDEI CHESD	SDS-Support Brokerage	7/1/2018
	YEDEI CHESD	SDS-Self-Hired Community Habilitation	11/1/2019
	YEDEI CHESD	SDS-Individual Directed Goods & Services	11/1/2019
	YEDEI CHESD	SDS-Family Reimbursed Respite	11/1/2019
	YEDEI CHESD	SDS-Other Than Personal Service Items	11/1/2019
	YEDEI CHESD	EXTERNAL CARE COORDINATION	11/1/2019
	YEDEI CHESD	SDS-Self-Hired Respite	10/1/2020
Rosenfeld-Test, Pessy 2/21/1990, 30, Female	YEDEI CHESD	Fiscal Intermediary	9/1/2020
	YEDEI CHESD	SDS-Self-Hired Community Habilitation	9/1/2020
	YEDEI CHESD	SDS-Self-Hired Respite	9/1/2020
	YEDEI CHESD	SDS-Support Brokerage	9/1/2020
	YEDEI CHESD	SDS-Individual Directed Goods & Services	9/1/2020
	YEDEI CHESD	SDS-Family Reimbursed Respite	9/1/2020
	YEDEI CHESD	SDS-Other Than Personal Service Items	9/1/2020
	YEDEI CHESD	EXTERNAL CARE COORDINATION	9/1/2020

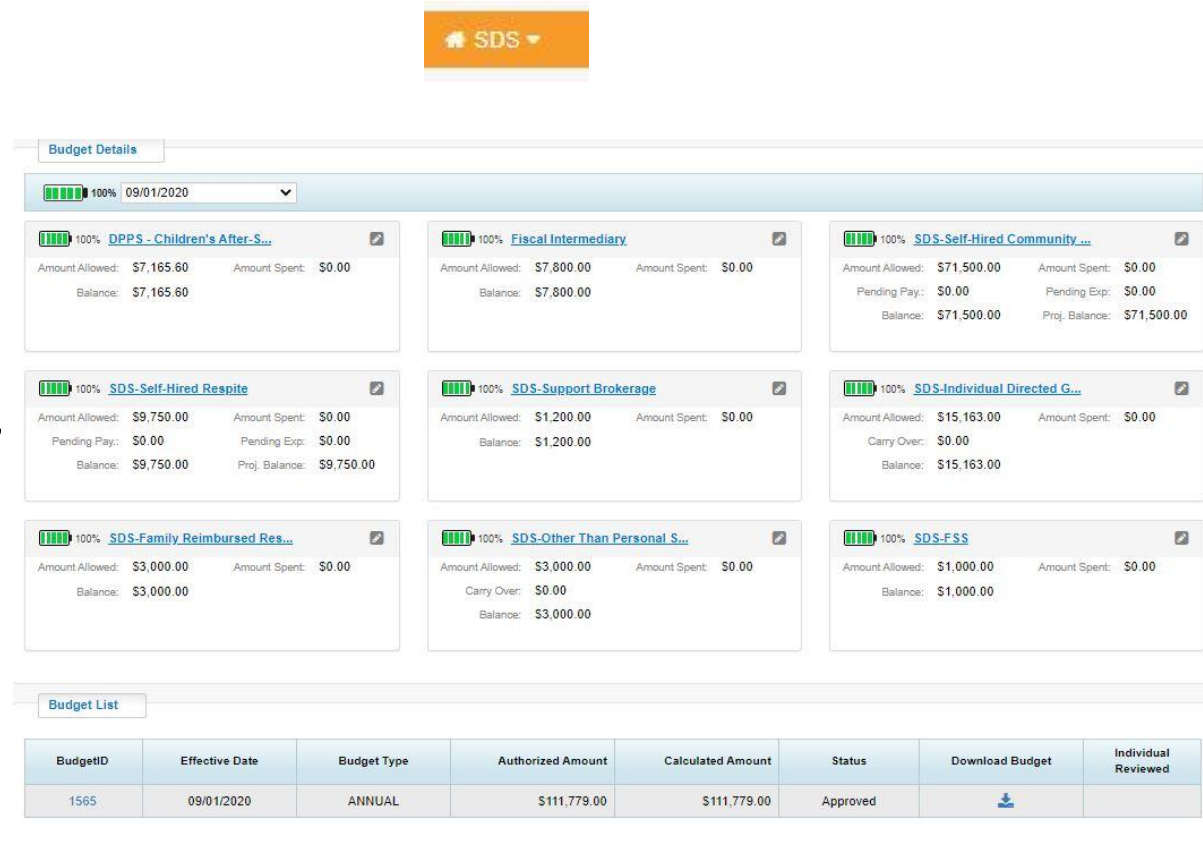
- Selecting the name of one Participant will show the Participants individual Dashboard

Dashboard

- The Main Page will display the Participants contact information and Health Information
- It will also display anyone that is linked with the participant.
 - This would include the Care Manager, Broker, FI Coordinator, Staff, and any other people that are linked to the account.
- The Programs show which programs are listed on the participants budget
 - This would include but not limited to FI, Broker, Com Hab, Respite, IDGS, OTPS and so forth.

SDS – SDS Summary

- Will display all Services listed on the budget.
 - Amount Allowed – Amount listed on the budget
 - Amount Spent – Amount already paid since the budget year started
 - Balance – Amount left to spend
 - Pending Pay – Invoices that have been submitted, but not yet reviewed by Yedei Chessed
 - Pending Exp – Invoices have been processed by Yedei Chessed and waiting for payments to be processed
 - Proj. Balance – Amount = Balance - (Pending Pay + Pending Ex)
- Budget List
 - PDF version of the latest approved budget.
 - Can be download as an excel budget as well.



SDS – SDS Summary Cont.

- Service Plan – Current Staff Action Plan
- Monthly Summary List – Monthly Summary that Staff fill out at the end of each month
- Broker Agreement
- Monthly Expenditure Report – Once Yedei Chesed signs the Report.
 - Once Yedei Chesed signs the Report an email will be sent as a notification.
- Broker Billing Summary – Copy of the Broker billing**

The screenshot displays a web application interface for SDS Summary. It features four main sections, each with a tab-like header and a data table or message below it.

- Service Plan:** A table with columns: Effective Date, Program, End Date, Type, Status, and Individual Reviewed. The first row shows: 07/01/2020, SDS-Self-Hired Community Habilitation, (blank), Annual Plan, a green checkmark icon, and (blank).
- Monthly Summary List: Apr 2020 - Sep 2020:** A message stating "There are no monthly summary for this individual." with navigation arrows on the right.
- Broker Agreement:** A message stating "There are no broker agreement for this individual." with navigation arrows on the right.
- Monthly Expenditure Report : Apr 2020 - Sep 2020:** A table with columns: Summary Date, Total, and Status. The first row shows: Total, \$0.00, and a status dropdown menu.

*See SDS – Broker Documentation for more information

SDS – SDS Summary Cont.

- Selecting the service will display any pending invoices.
- Self-Hired Staff will display date paid, and who it was paid to.
- Selecting IDGS, FRR, or OTPS will display all pending invoices



SDS-Self-Hired Community...

Amount Allowed:	\$71,500.00	Amount Spent:	\$0.00
Pending Pay:	\$88.84	Pending Exp:	\$0.00
Balance:	\$71,500.00	Proj. Balance:	\$71,411.16

Payment Details

Date Paid	Paid To	Amount
		Total \$0.00
		Externally Spent: \$0.00
		Transportation Spent: \$0.00
		Total Amount Spent: \$0.00

Projected Payment Details

Pay period	Paid To	Amount	Status
10/25/2020 - 11/07/2020	ROSENFELD-TEST, PESSY	\$88.84	Not Exported
	Total	\$88.84	

Cancel

Select Invoice

Invoice

Receipt ID	Receipt Date	Program	Category	Amount	Paid To	Status
144	10/29/2020	IDGS	Community Classes & Pu...	\$250	TEST VENDOR	SUBMITTED

View in Invoice Close

SDS – SDS Summary Cont.

- Select the pen icon on the top right corner of a service
- This will display a detailed breakdown of the service
 - Budget Amount – Amount listed in the budget
 - Amount Paid – Amount that has already been paid by Yedei Chessed
 - Payment Pending – Amount that has been submitted to Yedei Chessed but not yet paid
 - Externally Spent – Amount spent in the budget year before joining eVero



100% [SDS-Self-Hired Community Habilitation](#)

Amount Allowed:	\$71,500.00	Amount Spent:	\$0.00
Pending Pay:	\$88.84	Pending Exp:	\$0.00
Balance:	\$71,500.00	Proj. Balance:	\$71,411.16

Externally Spent

Externally Spent

Program: SDS-Self-Hired Community Habilitation

Program/Category	Budget Amount	Amount Paid	Payment Pending	Externally Spent	Reimbursement Amount	Balance Amount	Balance %
Com Hab Staff Pay	\$71,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$71,500.00	100
Total:				\$0.00			

* Service Discontinued.

Cancel

Externally Spent

Externally Spent

Program: SDS-Individual Directed Goods & Services

Program/Category	Budget Amount	Amount Paid	Payment Pending	Externally Spent	Reimbursement Amount	Balance Amount	Balance %
Community Classes & Publicly Available Training/Coaching	\$10,663.00	\$0.00	\$250.00	\$0.00	\$0.00	\$10,413.00	97.66
Health Club/Organizational Memberships/Community Participation	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	100
Household-Related Items and Services	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	100
Transportation	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00	100
Total:				\$0.00			

* Service Discontinued.

Cancel

SDS - Invoice

- Filters – Can filter to see past invoices
- Select orange + button on top left
- The following information is required:
 - Date of Service
 - Program (IDGS, FRR, OTPS) – Only services that are listed on the budget will show
 - Category
 - Paid To – Vendors will be preassigned.
 - Amount – Matching Invoice/Receipt
 - Description – Basic description of the service
 - Attachments – Required
- OTPS and IDGS Transpiration – Look at the Transportation Slide.
- Select Save to submit

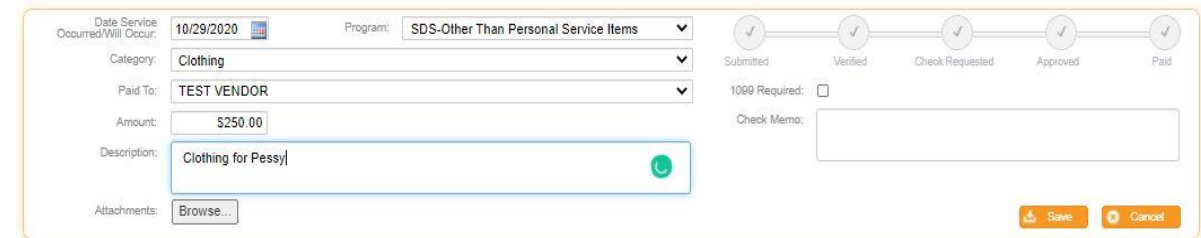


Invoice List

Sort by: Invoice date

1 / 1

+



Date Service Occurred/Will Occur: 10/29/2020

Program: SDS-Other Than Personal Service Items

Category: Clothing

Paid To: TEST VENDOR

Amount: \$250.00

Description: Clothing for Pessy

Attachments: Browse...

Submitted: [x] Verified: [x] Check Requested: [x] Approved: [x] Paid: [x]

1099 Required: ☐

Check Memo:

Save Cancel

SDS – Invoice Cont.

- The green Submitted button will appear. – *Edits can still be done at this point. Once Verified no edits are allowed.*
 - The Verified Button will turn green when Yedei Chessed Reviews the Invoice
 - The check Requested button will turn green when the reimburse is sent to billing
 - The Approved and Paid button will turn green once payment has been made.

The screenshot displays the SDS invoice interface. On the left, a form contains the following details: Date Service Occurred/Will Occur: 10/29/2020; Category: Clothing; Paid To: TEST VENDOR; Amount: \$250.00; Description: Clothing for Pessy; Attachments: mockinvoice. On the right, a horizontal progress bar shows five stages: Submitted (green circle with checkmark), Verified (grey circle with checkmark), Check Requested (grey circle with checkmark), Approved (grey circle with checkmark), and Paid (grey circle with checkmark). Below the progress bar, there is a '1099 Required' checkbox and a 'Check Memo' field. At the bottom right, there is a 'View History' link and a pen icon. A red arrow points to the pen icon.

Select the pen icon to go into the invoice to edit

SDS – Daily Note

- Internal Notes – will not be shared with anyone else, including Yedei Chased
 - Select orange + on the right corner to create a new note

The screenshot displays a web interface for managing daily notes. At the top, a tab labeled "Daily Note List" is active. Below it, a search section includes "Start Date" (10/29/2020), "End Date" (MM/dd/yyyy), a "Search" button, and a message: "No notes found for this date range." An orange plus icon is in the top right corner. Below the search bar is a form to create a new note, featuring a "Date" field (10/29/2020) and a "Description" text area. At the bottom right of the form are "Save" and "Cancel" buttons.

SDS – Broker Documentation

- See Budget information
- Service Documentation List
 - Where Brokers write monthly notes for Broker invoices to be generated.

The screenshot displays the 'Broker Documentation' interface. It features three main sections: 'Month', 'Budget Details', and 'Service Documentation List'.

Month: A dropdown menu is set to '10/2020'.

Budget Details: This section shows the following information:

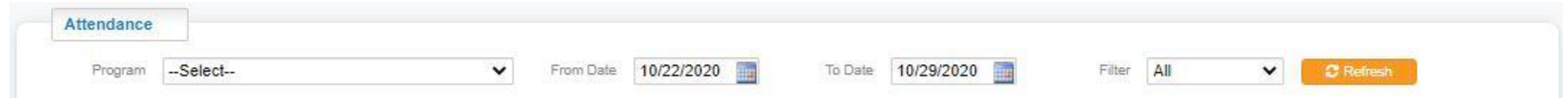
Category	Value
Budget Date:	09/01/2020
Annual Hours:	30 hrs 0 mins
Budget Amount:	\$1,200.00
Hours Used:	0 hrs 0 mins
Amount Used:	\$0.00
Balance Hours:	30 hrs 0 mins
Balance Amount:	\$1,200.00

Service Documentation List: This section contains a table with the following columns: Date, Service Type, Location, Duration, and Status. The table is currently empty, and a 'Total Hours' summary at the bottom right shows '0 hrs 0 mins'.

- At this time we are not requiring the broker invoices to be signed by the Participant/Designee in order to be processed. Once the families have completed the onboarding, this feature will be turned on.

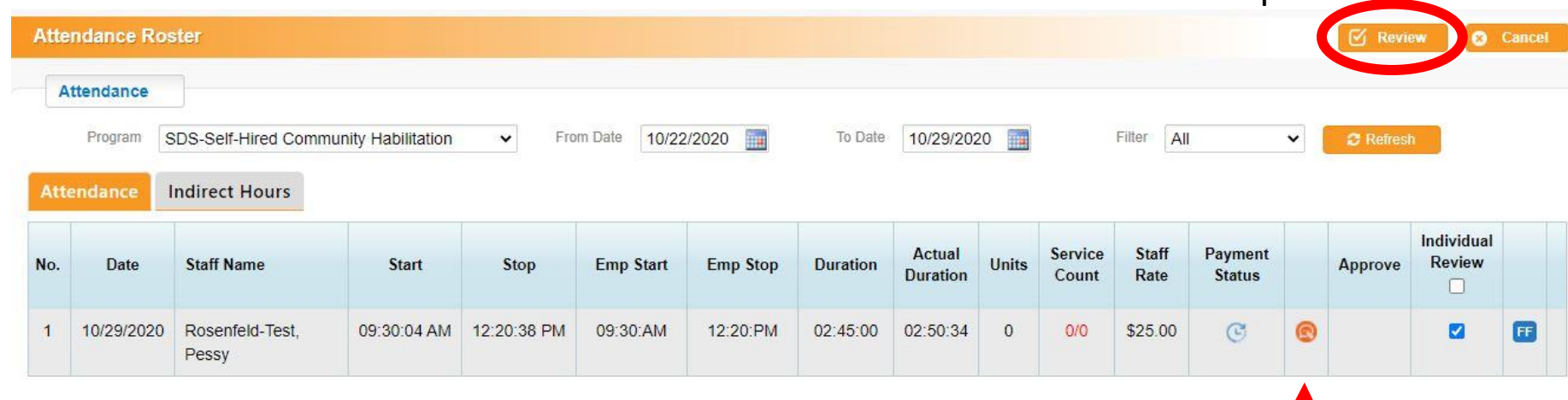
SDS – Attendance Roster

- Staff Time Sheets
 - Select Com Hab or Respite and select Refresh



The screenshot shows the top section of the Attendance Roster interface. It includes a 'Program' dropdown menu set to '--Select--', 'From Date' and 'To Date' fields with calendar icons (showing 10/22/2020 and 10/29/2020 respectively), a 'Filter' dropdown set to 'All', and an orange 'Refresh' button.

- It will show all Staff time for the dates selected for all staff linked with the Participant.



The screenshot shows the 'Attendance Roster' table. At the top right, there is a red circle around an orange 'Review' button with a checkmark icon, next to a 'Cancel' button. Below the table, there are two tabs: 'Attendance' (selected) and 'Indirect Hours'. The table has columns for No., Date, Staff Name, Start, Stop, Emp Start, Emp Stop, Duration, Actual Duration, Units, Service Count, Staff Rate, Payment Status, Approve, Individual Review, and a final status column. The first row of data shows staff member Rosenfeld-Test, Pessy on 10/29/2020, with a duration of 02:45:00 and an actual duration of 02:50:34. The 'Individual Review' checkbox is checked, and the final status column shows 'FF'.

No.	Date	Staff Name	Start	Stop	Emp Start	Emp Stop	Duration	Actual Duration	Units	Service Count	Staff Rate	Payment Status	Approve	Individual Review	
1	10/29/2020	Rosenfeld-Test, Pessy	09:30:04 AM	12:20:38 PM	09:30:AM	12:20:PM	02:45:00	02:50:34	0	0/0	\$25.00			<input checked="" type="checkbox"/>	FF

- Duration – Is the amount the Staff is getting paid for
- Actual Duration – the actual time staff worked
- Service Count – Service Documentation Record
- Orange comment bubble – Any comments regarding the time worked
- Individual Review – Select if approve the time
 - If Individual Review is selected, select orange Review button on top right corner

SDS - Monthly Summary Note

- At this time we are not requiring the Monthly Notes to be signed by the Participant/Designee in order to be processed. Once we have completed the eVero rollout, that feature may be turned on.

SDS – Response to Service List

- Daily Documentation Record

Response To Service List

☐ All ☒ Show last 12 Months

Program

SDS-Self-Hired Community Habilitation

Refresh

Summary Month	Facility Name	Individual Response	Comments	Summary
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
September 2020	Self Direction Site	F (2)	View	View

SDS – Annual Expense Summary

- Can view the yearly expenditure plan.
 - The reports are currently only accurate from August 2020 and on.
 - Any expenses before then should be listed on the expense report that was sent previously.
- IDGS and OTPS can be expanded to see individual lines within the section.

Annual Expenditure									
Item(s)/Service Description <small>(Items in red are discontinued in the latest amendment)</small>	Original Budget \$s	Accrued Budget \$s	Actual Dollars Spent Per Month	\$s Externally Spent	\$s Reimbursed Amount	\$s Spent Year-to-Date	\$s Remaining/ Overspent	% Remaining	
			Sep						
+ SDS-Individual Directed ...	\$15,163.00	\$15,163.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,163.00	100%	
+ SDS-Other Than Persona...	\$3,000.00	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00	100%	
SDS-Family Reimbursed Res...	\$3,000.00	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00	100%	
SDS-Support Brokerage	\$1,200.00	\$1,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,200.00	100%	
SDS-Self-Hired Community H...	\$71,500.00	\$71,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$71,500.00	100%	
SDS-Self-Hired Respite	\$9,750.00	\$9,750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,750.00	100%	
SDS-FSS	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	100%	
Children's After-School Program	\$7,165.60	\$7,165.60	\$0.00	\$0.00	\$0.00	\$0.00	\$7,165.60	100%	
* Fiscal Intermediary	\$7,800.00	\$7,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,800.00	100%	
Totals <small>(*These items not included in budget totals)</small>	\$111,778.60	\$111,778.60	\$0.00	\$0.00	\$0.00	\$0.00	\$111,778.60	100%	

Transportation


 Transportation


- This can be submitted for the Participant/Designee or for the Staff.


Transportation


Category INDIVIDUAL ▼ From Date 11/01/2020 📅 To Date 11/01/2020 📅 Items Per Page 10 ⏮ ⏪ 0 / 0 ⏩ ⏭ +


Date ▼	Miles	Amount	Toll/Parking Fee	Individuals	Entry Date	Comments
<input type="text"/>				<input type="text"/>		


 Document Attached


 Add Comments


 View Comments


 Staff Acknowledged


 Parent Reviewed


 Approved

 Rejected

 Previously Rejected

 Exported

 Invoice Generated

 Staffpay Generated

⏮ ⏪ 0 / 0 ⏩ ⏭

- Previous trips can be found here as well.
- Select the orange + in the right corner to add a trip.
- All travel entries will be paid at one time per month, not individually.

Transportation Cont.

- Transportation Date – Date of travel
- Paid To – Vendors will be pre-assigned
- Program – IDGS or OTPS
- Odometer Reading – Not required
- Round Trip – Selecting this will not double the Amount
- Toll/Parking Fee –
Participants/Designees can not be reimbursed for Parking. If Toll will be reimbursed with this transpiration an attachment, receipt/invoice will be needed.

Transportation Entry

Transportation

Transportation Date: 11/01/2020

Paid To: TEST VENDOR

Program: OTPS

Odometer Reading: Start Stop

Miles: 291

Amount: \$168.78

Toll/Parking Fee:

Leaves From

Leaves From: 141 Lafayette Ave

Start Time: 01:27 PM

Street:

City: Suffern

State: NEW YORK

Zip: 10901

Goes To

Goes To: Boston University

Stop Time:

Street: 881 Commonwealth Avenue

City: Boston

State: MASSACHUSETTS

Zip: 02215

Individuals

		Mileage Rate
<input checked="" type="checkbox"/>	Rosenfeld-Test, Pessy	\$0.58

Purpose Of Visit

Visit family

Attachments

Browse...

Save Close

- Leaves From – The magnifying icon will show a list of favorites. The Default address will be the participants home address
- To add more address to favorites, add the address in the requested boxes (Do not add Start Time) and select the Green star
- Start Time and Stop Time do not need to be filled out.
- Purpose of Visit – Must be filled out and connecting to a Valued Outcome in the Life Plan.
- Attachment is needed if the Amount is filled out and/or if Toll Parking Fee is filled out.

Transportation - Staff

- If Staff have put in for transportation the participant/designee will have to sign off on it as well.

The screenshot shows a web application interface for managing transportation requests. At the top, there's a 'Transportation' tab. Below it, filters include 'Category' set to 'EMPLOYEE', 'From Date' and 'To Date' both set to '11/01/2020', and a 'Filter' dropdown set to 'Review Pending'. An orange 'Review' button with a checkmark icon is circled in red. Below the filters is a table with columns: Date, Miles, Amount, Toll/Parking Fee, Individuals, Entry Date, and Comments. Two rows of data are visible, both dated 11/01/2020. The first row shows 20.2 miles, \$11.72 amount, and 'Rosenfeld-Test, Pessy' as the individual, with a comment 'Community Intergration'. The second row shows 4.2 miles, \$2.44 amount, \$0.00 toll, and 'Rosenfeld-Test, Pessy' as the individual, with a comment 'Money management'. At the bottom, there's a status bar with various icons and labels: Document Attached, Add Comments, View Comments, Staff Acknowledged, Parent Reviewed, Approved, Rejected, Previously Rejected, Exported, Invoice Generated, and Staffpay Generated. A red line with arrows at both ends connects the bottom of the table to the list of instructions below.

	Date	Miles	Amount	Toll/Parking Fee	Individuals	Entry Date	Comments
<input type="checkbox"/>	11/01/2020	20.2 <small>Auto</small>	\$11.72		Rosenfeld-Test, Pessy	11/01/2020	Community Intergration
<input type="checkbox"/>	11/01/2020	4.2 <small>Auto</small>	\$2.44	\$0.00	Rosenfeld-Test, Pessy	11/01/2020	Money management

- Change Category to Employee and select the date of travel.
 - It should be Filtered by Review Pending so that all unapproved travel will appear.
- Select the date of travel for the travel information
- Select the orange box if any comments need to be made
- Select the white box next to the date of travel and then select the orange Review box on the top right side to approve the travel

Staff Activity Fees

 Staff Activity Fees

- If staff have requested reimbursement under Staff Activity Fees it will have to get approved by the Participant/Designee.













Staff Activity Fees

05/15/2020 - 05/31/2020

Filter All

Items Per Page 10

Review

Date ▲	Amount ▲	Individuals ▲	Entry Date ▲	Description ▲		
05/21/2020	\$25.00	TESTGIRL, CASEY	05/21/2020	food for service		
<div> Document Attached  Add Comments  View Comments  Staff Acknowledged  Parent Reviewed  Approved  Rejected  Previously Rejected  Exported  Invoice Generated</div>						

- Select the date of service to see the attachment (Which would be the receipt/invoice)
- Select the orange box if any comments need to be made

Documents



- See all the documents link to the participant.
- ISP Doc (Life Plan) – Required 2 a year
- ISP Doc Review – Life Plans that are not approved yet
- Level of Care (LOC) – Required every year
- Notice of Decision (NOD) – Required to receive Start-Up approval. No follow up required
- Progress Report – Any additional documentation needed, ex. Launch Documents
- SDS – Agreement – Broker Agreements
- SDS – Receipts – Any attachments made with an invoice.
- Service Plan Summary – Staff Action Plan, What the staffs service documentation is based on

Document Folder

Notice of Decision (NOD)

Progress Report

SDS - Agreement

SDS - BrokerSummary

SDS - Budget

SDS - Expenditure Report

SDS - Monthly Summary Note

SDS - Receipts

SDS - SafeGuard

SDS - ServiceDocument

Service Plan Summary

Document

Description	Category	Start Date	End Date	Status
Self-Hired Community Staff Action Plan - 07/01/2020 - Annual Plan		07/01/2020		

Help



- Videos – Link to general videos that the eVero team has recorded.
- User Guide – PDF on how to use the eVero Portal

Notifications



- Any time the FI signs a document
 - For reimbursements
 - For the monthly expenditure plans
- Any time eVero needs to send a message.

How to Download the App

- <https://evero.com/evero-mobile-applications/>
- Choose the second option, Self-Direction Family Mobile App.
- Will not work on kindle devices.
- 3rd party app – Follow instructions

digitalAGENCY™ Mobile

Take our EHR system is right in the palm of your hands! Access your data 24/7/365 and always know that you're HIPAA and HITECH Act compliant. Now, you can deliver quicker, higher quality care as digitalAGENCY™ Mobile helps to keep you in complete control of the electronic health records you manage.

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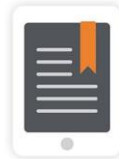
The industry leading care management system is right in the palm of your hand! Access your data 24/7/365 and always know that you're HIPAA and HITECH Act compliant. Now, you can deliver quicker, higher quality care as digitalAGENCY™ Mobile helps to keep you in complete control of the electronic health records you manage.

Any mobile device turns into a care management tool that travels alongside you. You can communicate with your team, track accountability with staff in the field, optimize back-end logistics, and more. Capture data right at the point of care and never worry about your accuracy in reporting again. digitalAGENCY™ Mobile brings your team into the 21st Century.

Follow the links below to download dA™ Mobile. Our app is only available directly through the eVero website; you won't find it in the App Store or Google Play.

Newest Update:
digitalAGENCY™ Mobile Version 4.7

Release Date:
August 2020



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digitalAGENCY™ Mobile

For Android OS mobile devices

[Please click here to read the dA™ Mobile Installation Guide \(PDF\).](#)

In order to properly download and install our digitalAGENCY™ Mobile application on your Android device, please make sure to follow all of the directions in the Installation Guide above.

The minimum OS supported for this release is: Android 5.0 Lollipop.

Newest Update: digitalAGENCY™ Mobile Version 4.7
Release Date: August 2020

[Download dA™ Mobile for Android OS](#)

- Agency Code: YEDEICHESED

Mobile App

- All features that are available online are available on the App
 - If the log-in is linked to multiple agencies, YEDEICHESED will have to be selected.
 - Only one participant can be worked on at a time. So if multiple Participants are linked to the account one will need to be selected to see the Home page.

Mobile - Budget Summary

- Will display all Services listed on the budget.
 - Amount Allowed – Amount listed on the budget
 - Amount Spent – Amount already paid since the budget year started
 - Balance – Amount left to spend
 - Pending Pay – Invoices that have been submitted, but not yet reviewed by Yedei Chesed
 - Pending Exp – Invoices have been processed by Yedei Chesed and waiting for payments to be processed
 - Proj. Balance – Amount = $\text{Balance} - (\text{Pending Pay} + \text{Pending Ex})$

- We can lock any accounts, at any time, as needed.
- If new accounts are needed please let us know.
- If new vendors are needed – the Vendor is the Paid To on an invoice – Please let us know.