Finance

SERVICE PROVIDERS

Community Care NB
Soins Communautaires NB

| USER GUIDE |

Version 0.8

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CONFIDENTIAL STATEMENT

Version & Document Control Table

This version control table provides historical data about each update made to a document. It is useful to include the author, date and notes about each change made to refer back to what these changes were.

Version Control			
Version	**Edited**	**Date**	**Changes**
0.1	Amy Michaud	05/31/2024	First Draft
0.2	Amy Michaud	07/25/2024	Added Confidential statement and versions.
0.3	Amy Michaud	09/20/2024	Update Screenshots to accommodate UI changes / included error message for Basic Units and Stat Holiday Units / Updated Error sheet to include kilometer mismatch validation
0.4	Amy Michaud	11/15/2024	Dashboard / Updated Screenshots / Zero Value or Blank SC Error / Notifications / Connected Tab
0.5	Amy Michaud	11/22/2024	**Unique Invoice Number Warning Pg. 6 & 11**
0.6	Amy Michaud	12/09/2024	How to edit vendor confirmation number
0.7	Amy Michaud	02/25/2025	Updated Screenshots / Error added / Dashboard Reports
0.8	Amy Michaud	04/28/2025	Updated Screenshots / Order Summary / Removed Connected

MODULE A3 – FINANCE

PURPOSE: Become familiar with the background and concepts of the CommunityCareNB platform in relation to Service Confirmations.

Module Overview

While working in CommunityCareNB in the Finance persona, you will have access to various functions and features. These functions and features will help support you during the service confirmation process (e.g., ability to validate and receive a detailed error message if/when it fails). CommunityCareNB also provides you with the ability to log change requests if the service unit amount (i.e. day, week, hour, etc.) does not align with the amount received for that payment cycle.

Service Confirmations

When services that have been provided by an agency are ready to be confirmed and processed for payment, the following steps will need to be completed:

a. **First Step:** Identify the services that require billing and generate a list of all services that are active for the time frame (e.g., last week, last month).

b. **Second Step:** Create the file to enter the 'actual' hours/units etc.

c. **Third Step:** Validate the information (the system will check for errors), and the final step is to submit. Submission will send the file directly to Service NB for payment.

Notes on Service Confirmations:

- Service Confirmations can be submitted at any time.
- Ability to submit multiple confirmations (e.g., March 1 submission, April 1 submission)
- If a service needs to be changed, a new service request is generated and requires acceptance by the service provider and Social Development to activate.
- Hours/units are calculated monthly. If you submit weekly, each submission draws from the monthly amount. You will not be able to submit for more than the monthly approved amount, however, variation across weeks to reflect actual service variation is permitted. For example, if you are approved for 120 hours per month with the expectation of 30 hours per week, it is acceptable to submit 25 in the first week, 35 in the second week, 30 and 22 for the following.
- **Service Confirmations cannot cross months.** Multiple service confirmations can be submitted. For example, April 1 to April 30th can be submitted. April 15 to May 15 cannot be submitted. April 15-April 30 can be submitted and May 1- to May 15 can be submitted.
- You are confirming services rendered, not those approved. It is fraud to claim to have provided services that were not rendered to the client. Falsely claiming services rendered violates the service agreement and can result in termination of the service agreement.
- Invoice / Vendor Confirmation numbers **must** be unique across all systems (i.e., CommunityCareNB & VEIS/NBFamilies). If the invoice/vendor confirmation number is **not unique**, the service confirmation will be rejected and will have to be submitted with a unique invoice number.

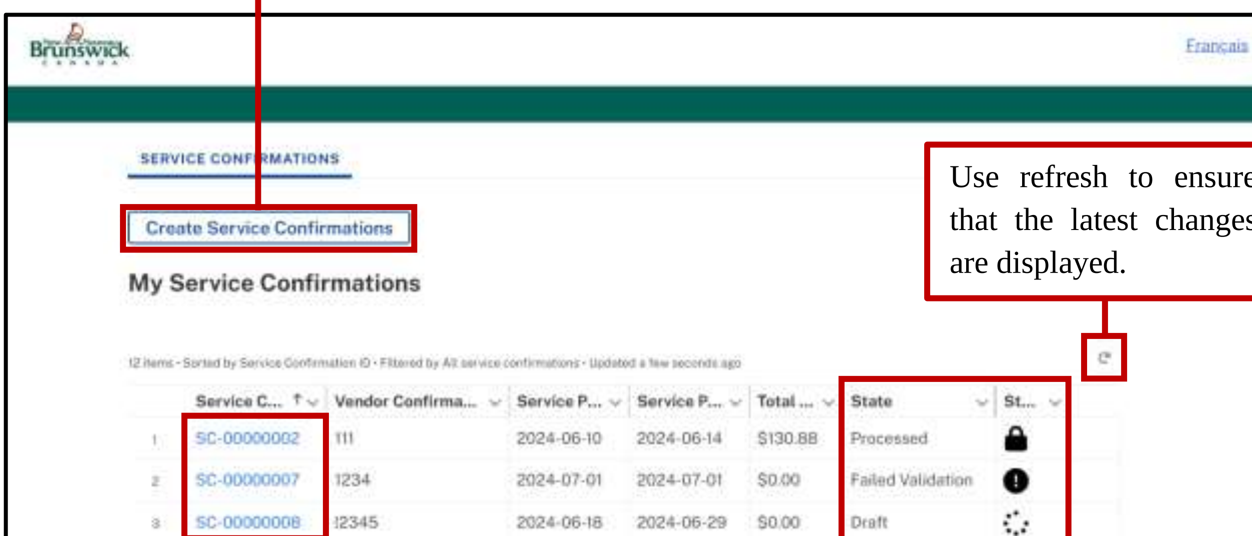
Follow the steps below to learn how to:

Click on any of the topics to be immediately redirected to the section in this user guide.

Service Confirmations Page Overview

Select this button to begin creating a new service confirmation.

Use refresh to ensure that the latest changes are displayed.

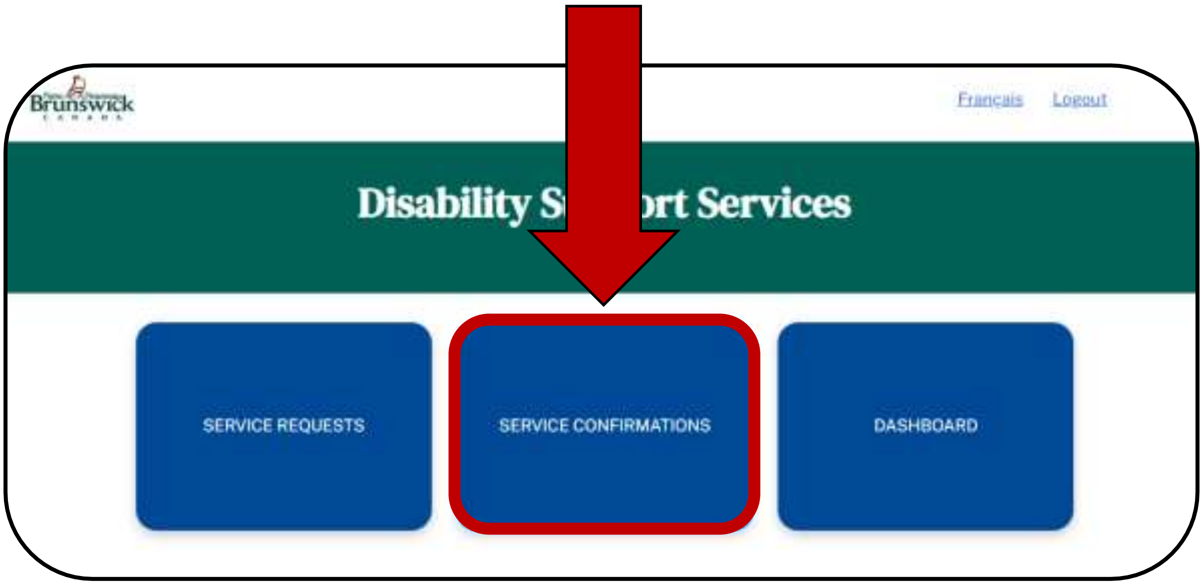


Select a hyperlink to open and view Service Confirmation details.

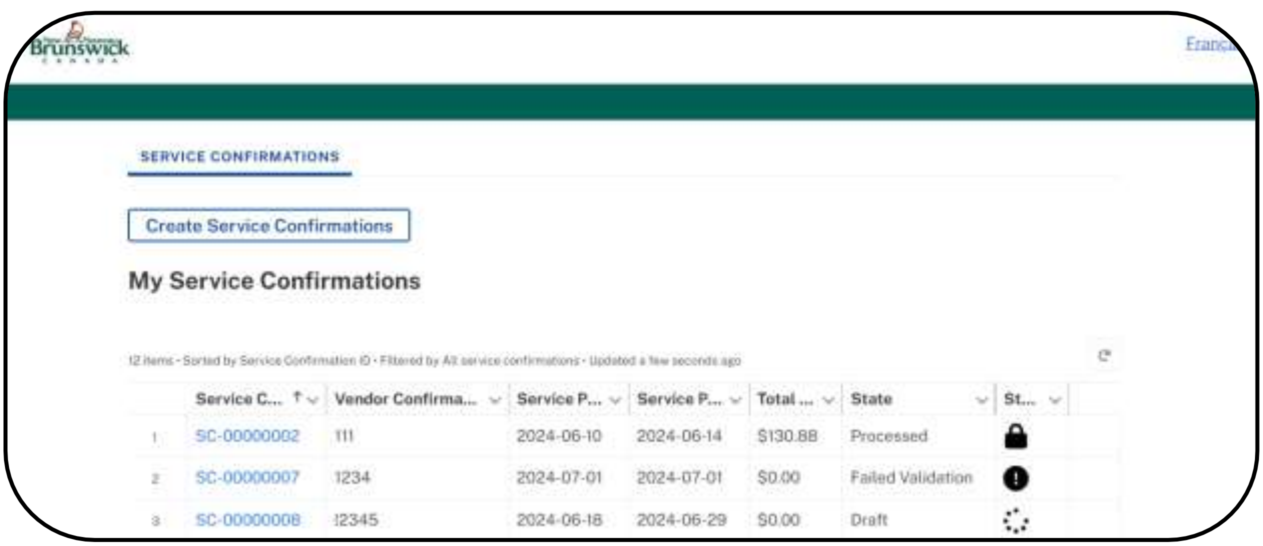
These columns display the state and status (*icons*) of a Service Confirmation.

How to Access Service Confirmations

1. When logged in, you will have one or two options (depending on your permission setting). There are three user types: a) coordination, b) finance, and c) coordination + finance. Select the **Service Confirmation** tile.

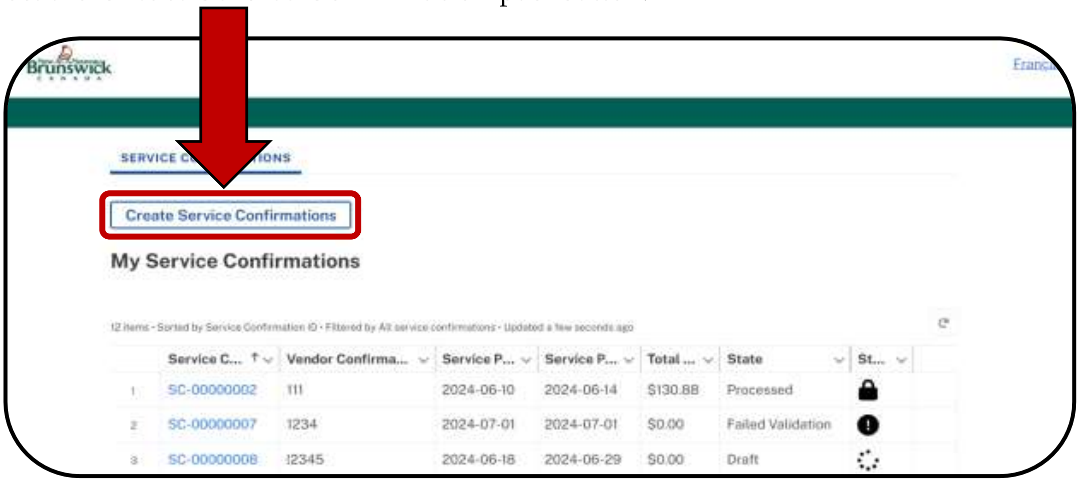


2. The Service Confirmation window is now open.



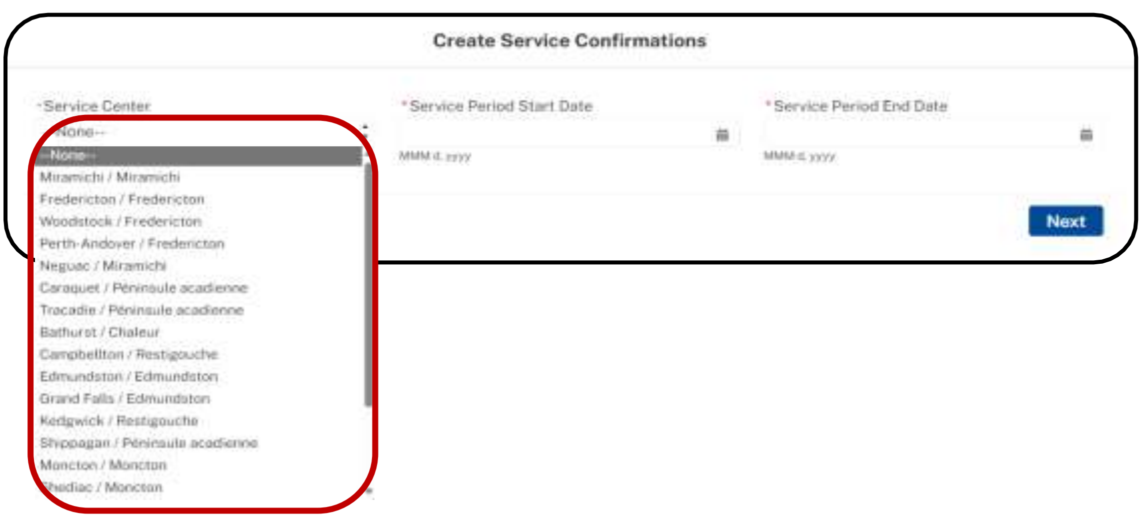
How to Create Service Confirmation List

1. Select the **Create Service Confirmation** pushbutton.



2. The **Create Service Confirmation** window appears (i.e., Service Center, Service Period Start Date and End Date).

3. Select the **Service Center** (area of the province in which service was delivered) from the dropdown menu.



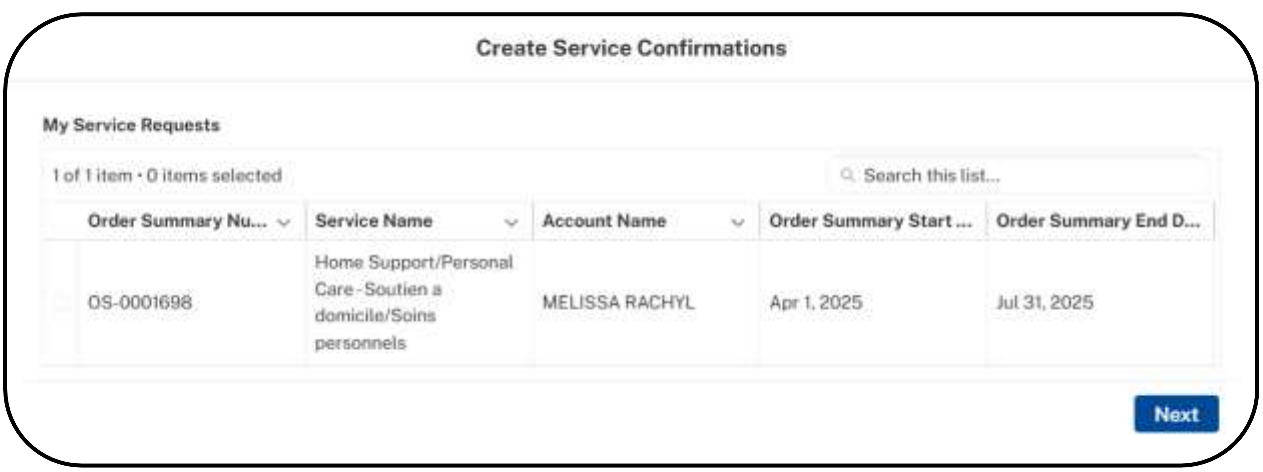
4. Select the **Service Period Start** and **End Date** (e.g., weekly, monthly).

NOTE: You will receive an error message if:

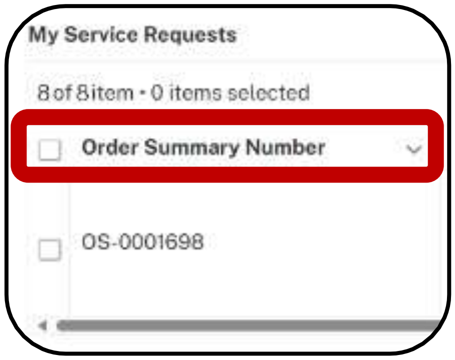
- **a) Service End Date is in the future.**
- **b) Service Start Date is more than a year in the past.**
- **c) Service Start and End Date are not in the same month of same year.**

5. Once completed, click the **Next** pushbutton.

6. The **My Service Request** window is displayed. From here, you will select all service requests that apply for the Service Period that was captured on the previous window.



7. If all Service Requests should proceed for payment, select the **checkbox** next to **Service Request Number**, otherwise, individually select each applicable order summary, Click the **Next** pushbutton.



8. Enter your **Vendor Confirmation Number** (i.e., *invoice number*). Click **Next**.

IMPORTANT: Invoice numbers must be unique across all systems (i.e., CommunityCareNB & VEIS/NBFamilies). If the invoice/vendor confirmation number is **not unique**, the service confirmation will be rejected, and will have to be submitted with a unique invoice number.

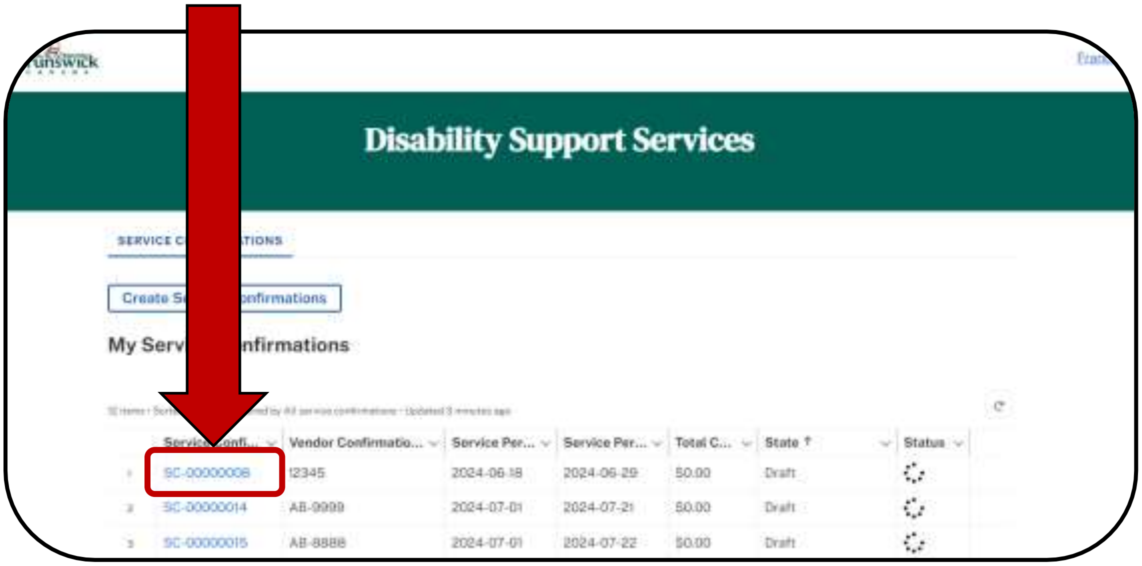
9. The **Created Service Confirmation** is displayed in the list. **State and Status in *draft.*** If new confirmation ID does not appear in the list, click the refresh button at the top right of the table.

NOTE: You will receive an error message if:

a) **The same Vendor Confirmation Number is used for another Service Confirmation**

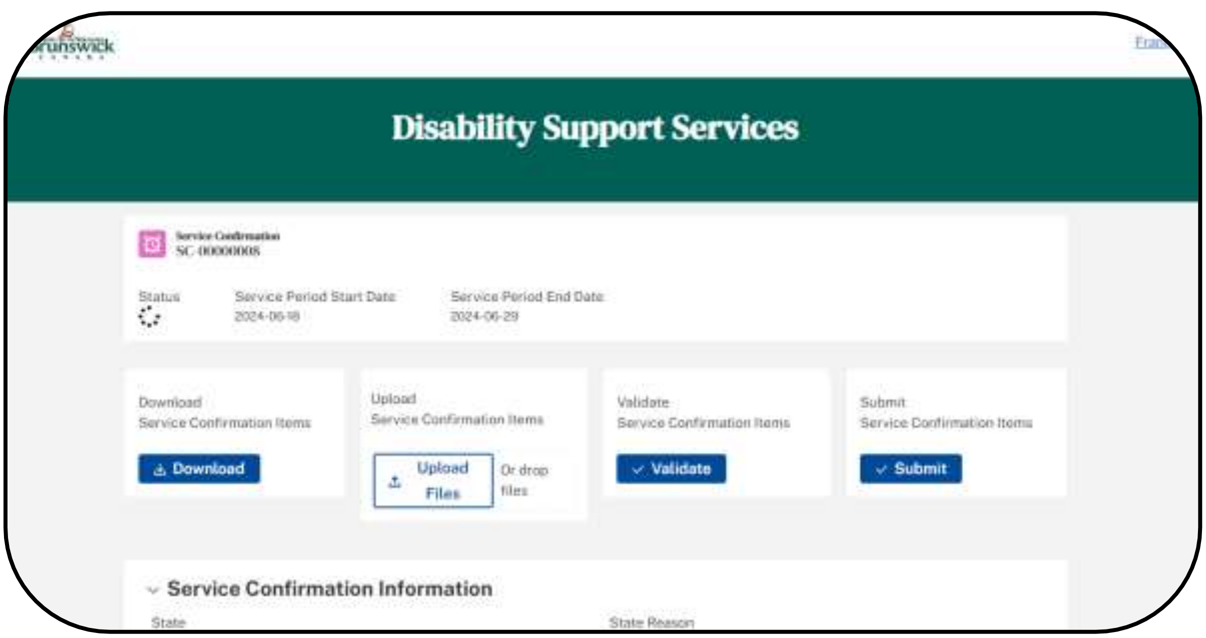
How to Open Draft Service Confirmation

1. Select the **Draft Service Confirmation ID**.

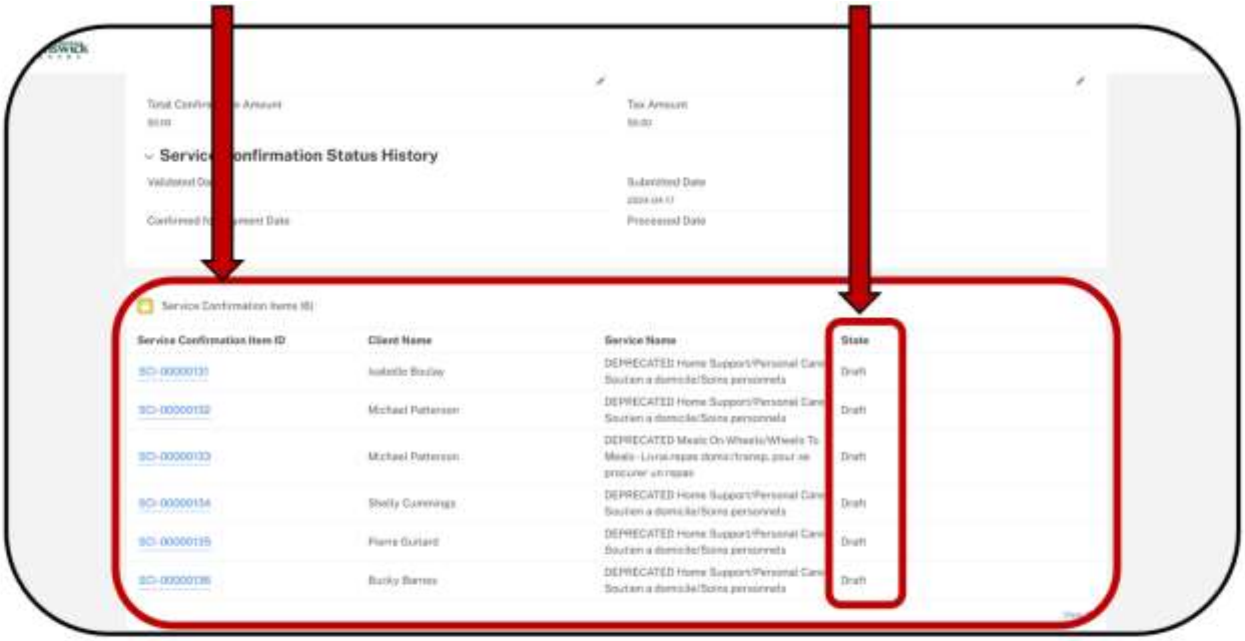


2. The **Service Confirmation** detail window opens. From this window, you can download, upload, validate and submit Service Confirmation Items. Additionally, this window provides information on the Service Confirmation (e.g., state, Tax Amount, HST GST ID, etc.)

You will go through a step-by-step process, completing each of these actions in sequence; download, upload, validate, and submit.



3. Scroll to the bottom of the page. From there, the Service Confirmation Items are displayed, and the ***State*** of these items are in **Draft**.



4. Select **View All** to display all Service Confirmation Items.

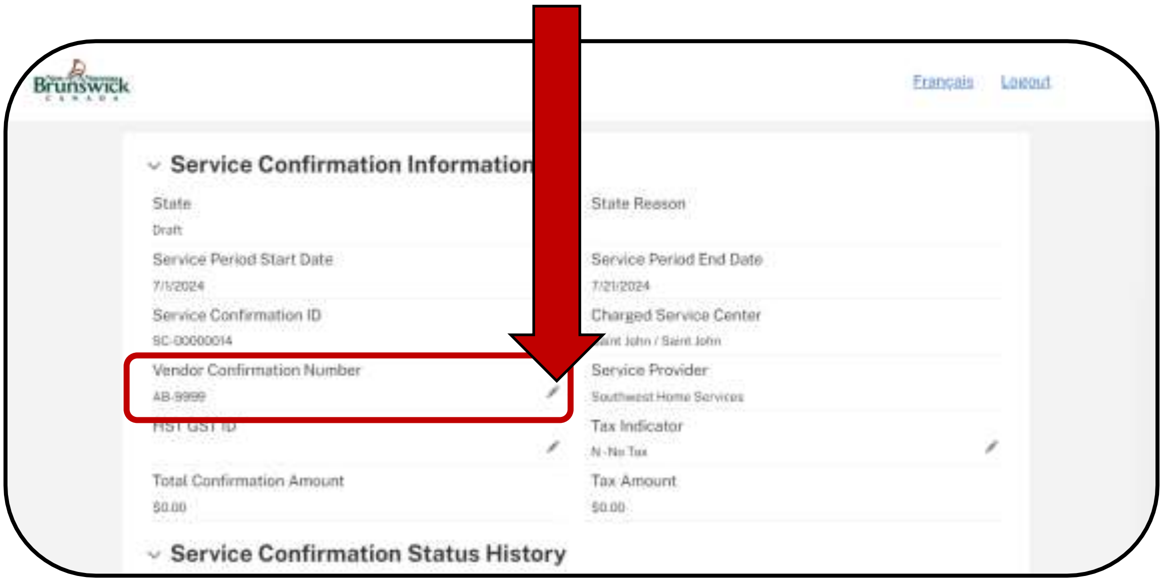
NOTE: The State column is very important. If at any point an item did not properly validate, this column will help to indicate which item needs correction, also prompting you to take the necessary steps (e.g., log a change request to a client's service(s)).

How to Edit Vendor Confirmation Number

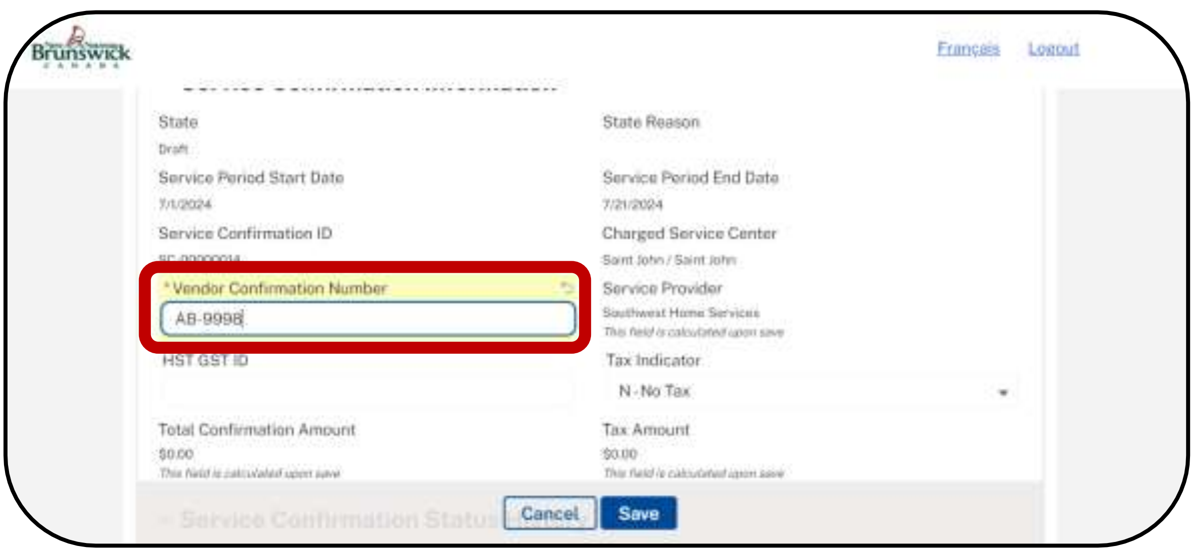
The Vendor Confirmation number can be edited in the event that it is a duplicate, entered-in-error or contains an error. The vendor confirmation number can be updated in a **Draft**, **Uploaded** and **Validated** state. Once submitted, it can no longer be edited.

1. Open the applicable Service Confirmation by selecting the Service Confirmation Number.

2. Under **Service Confirmation Information**, click the **Pencil** icon next to **Vendor Confirmation Number**.



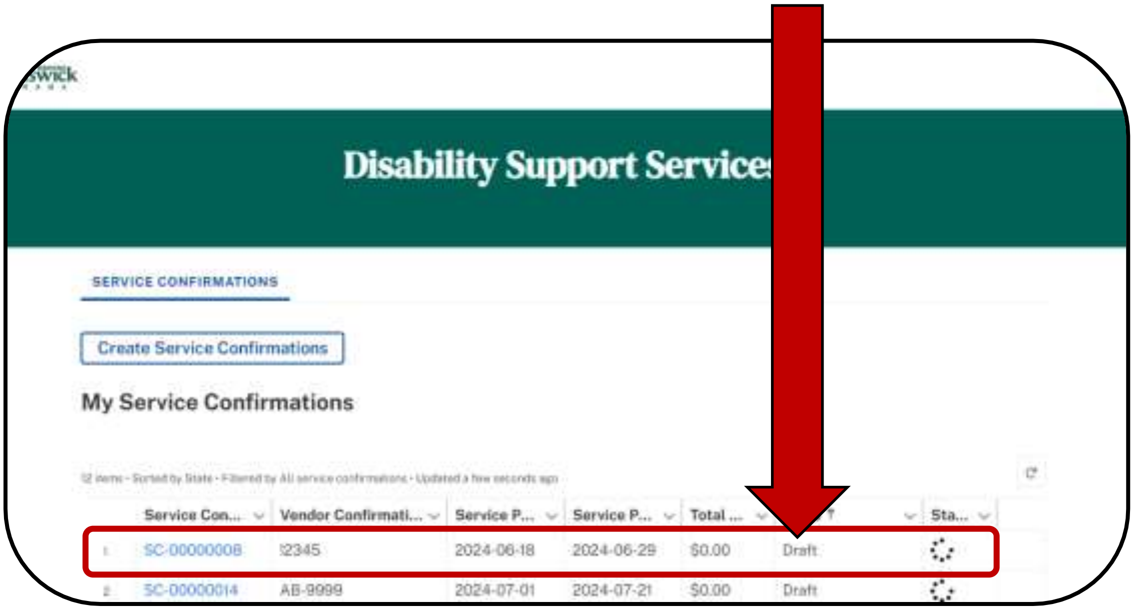
3. Make the necessary changes and click **Save**. The changes are saved and updated.



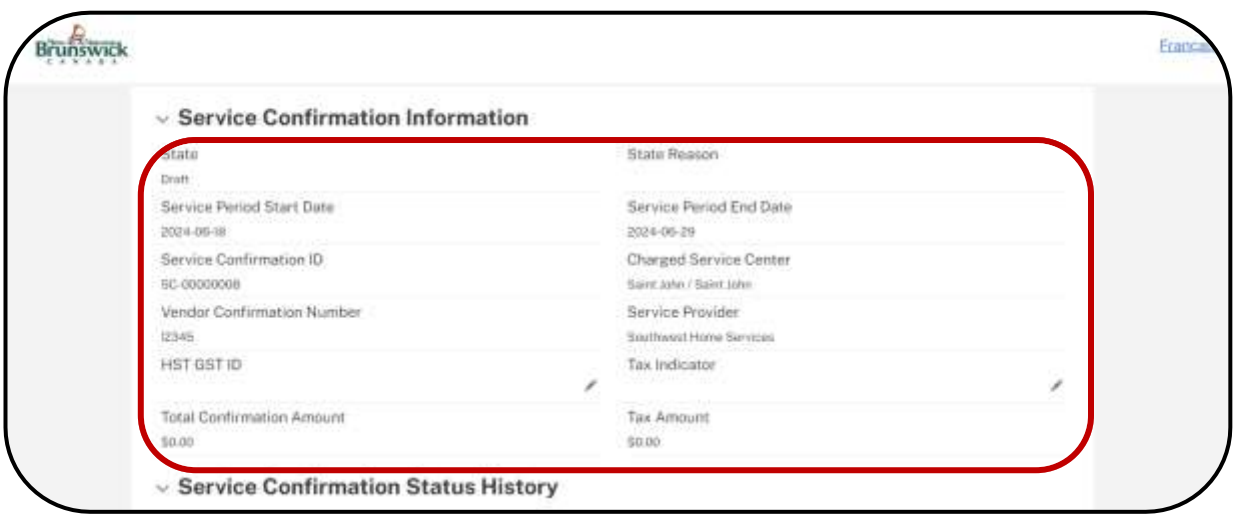
How to Add Tax & HST GST ID

Tax Indicator and HST GST ID will be required prior to submitting any Service Confirmation – the **Tax Indicator is a mandatory field.** This section of the guide will show you where to find these fields and capture information.

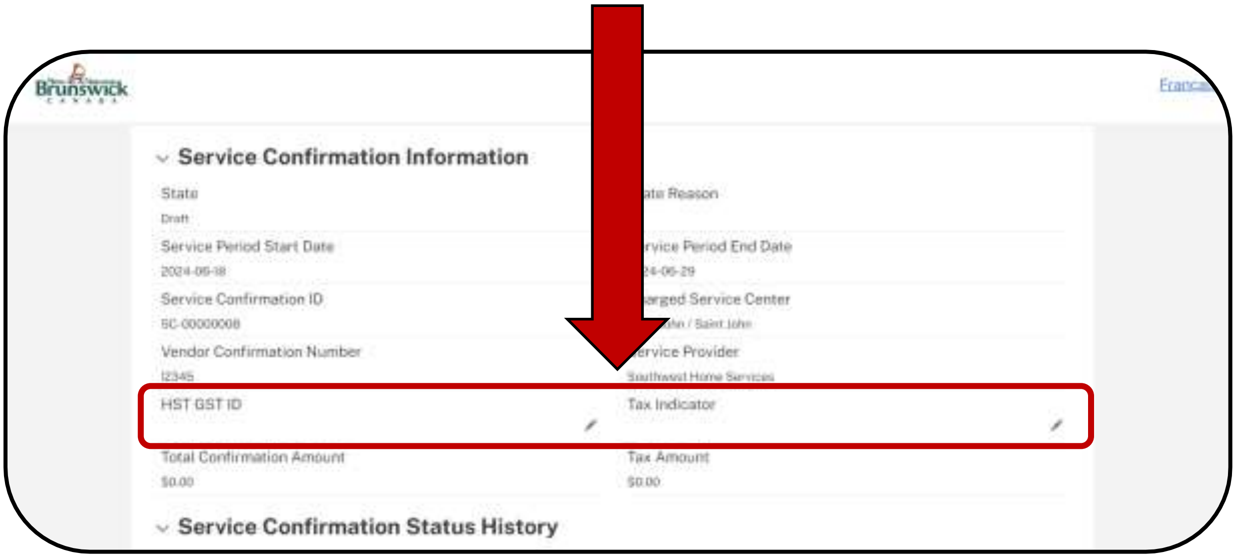
1. From the Service Confirmations List, open the **Draft Service Confirmation**.



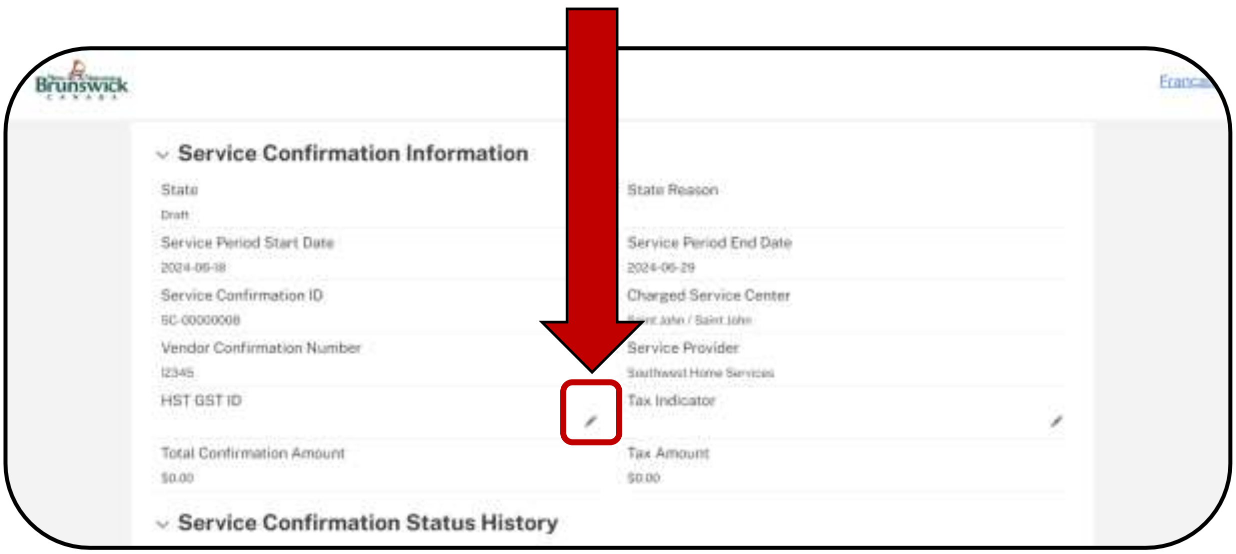
2. Once opened, scroll down to view the **Service Confirmation Information** fields.



3. Locate the **HST GST ID** and **Tax Indicator** fields.

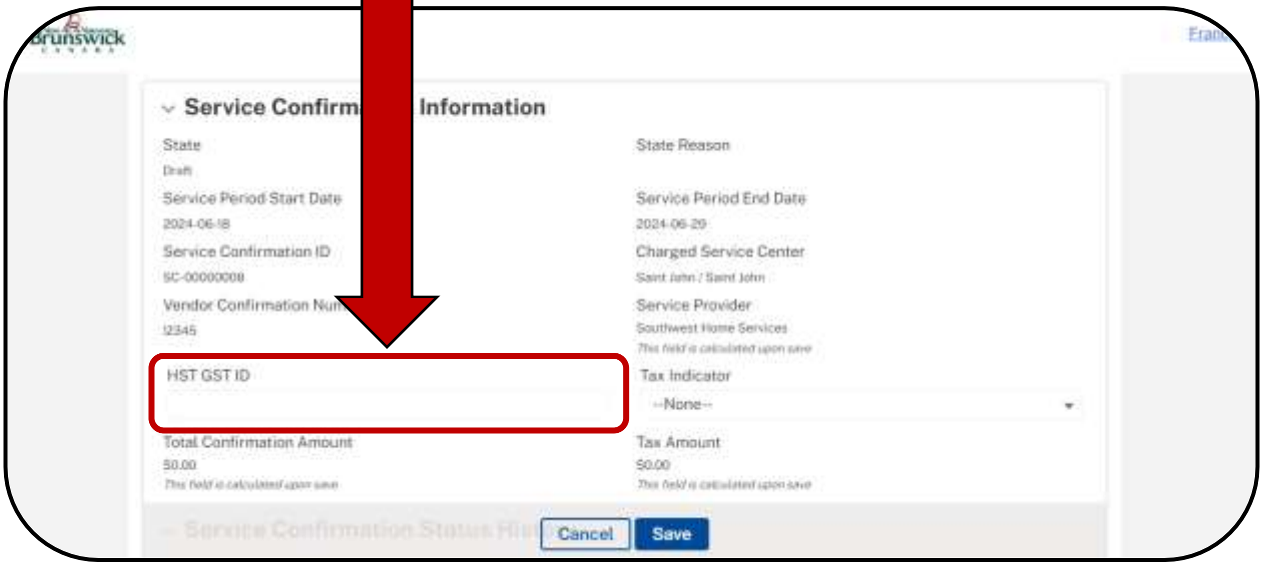


4. Select any **Pencil Icon** to open the editable fields.

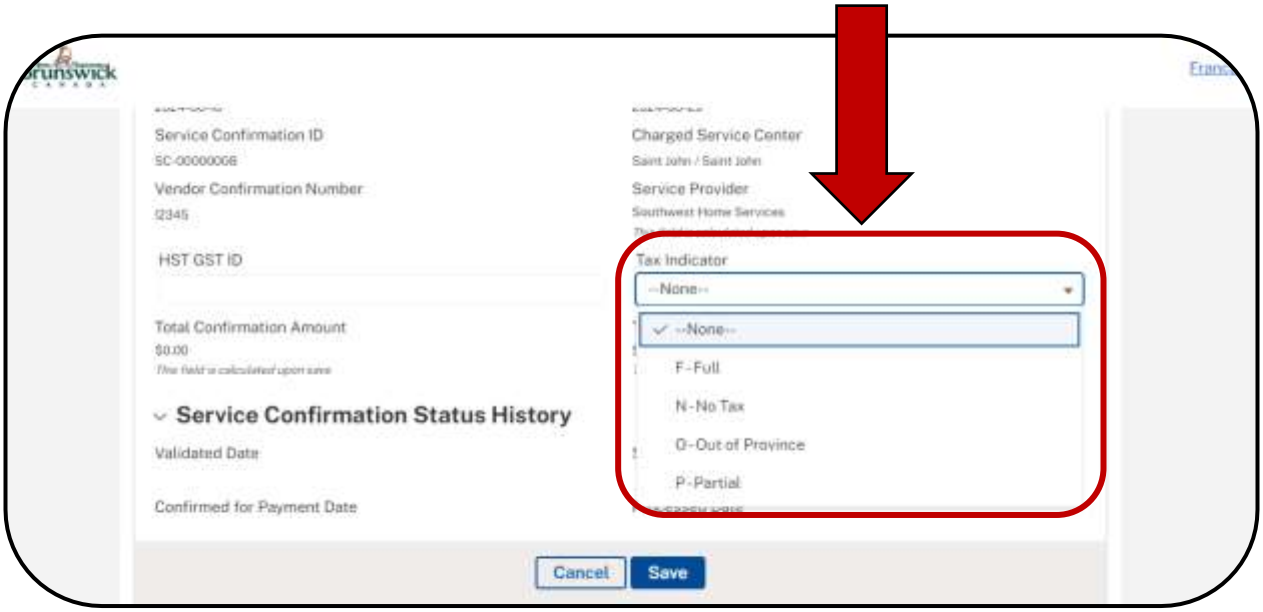


5. The editable fields are now open.

6. Enter the **HST GST ID (*if applicable*)** in the corresponding field.



7. Select the applicable **Tax Indicator** from the dropdown menu.

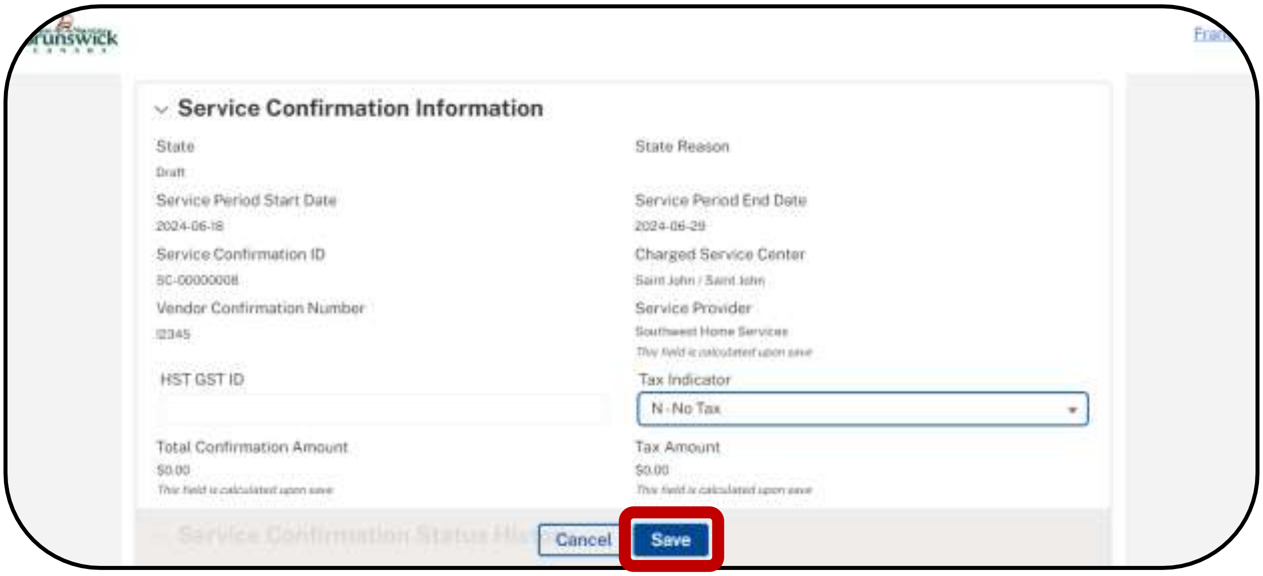


NOTE: You will receive an error message if:

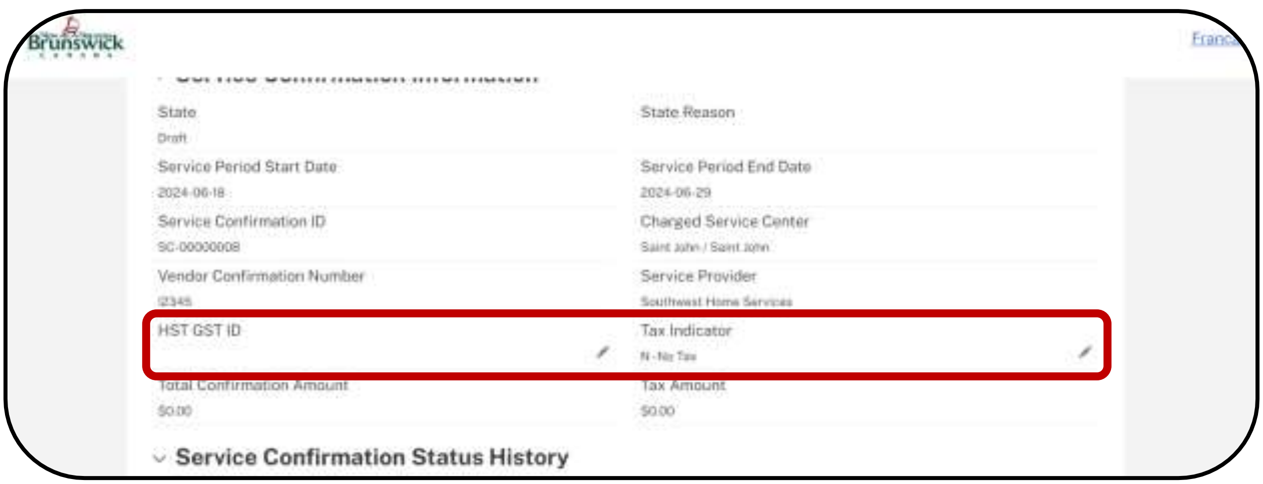
a) Missing Tax Indicator

b) Missing HST GST ID (if applicable)

8. Click the **Save** button.

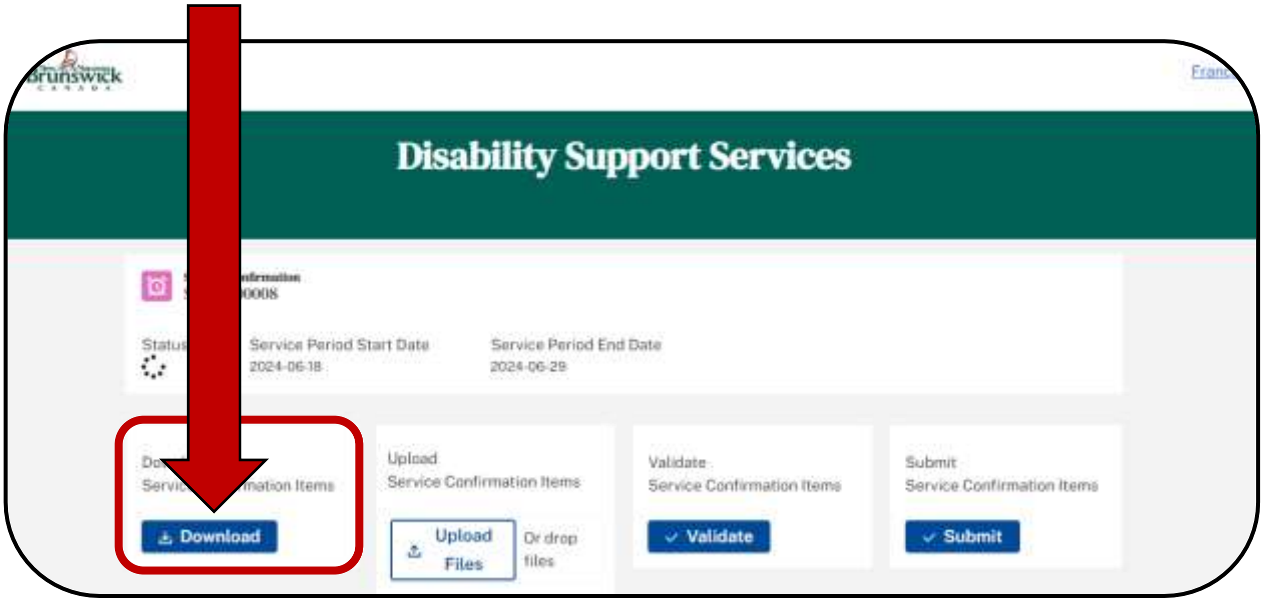


9. The window refreshes and the changes made are now displayed.

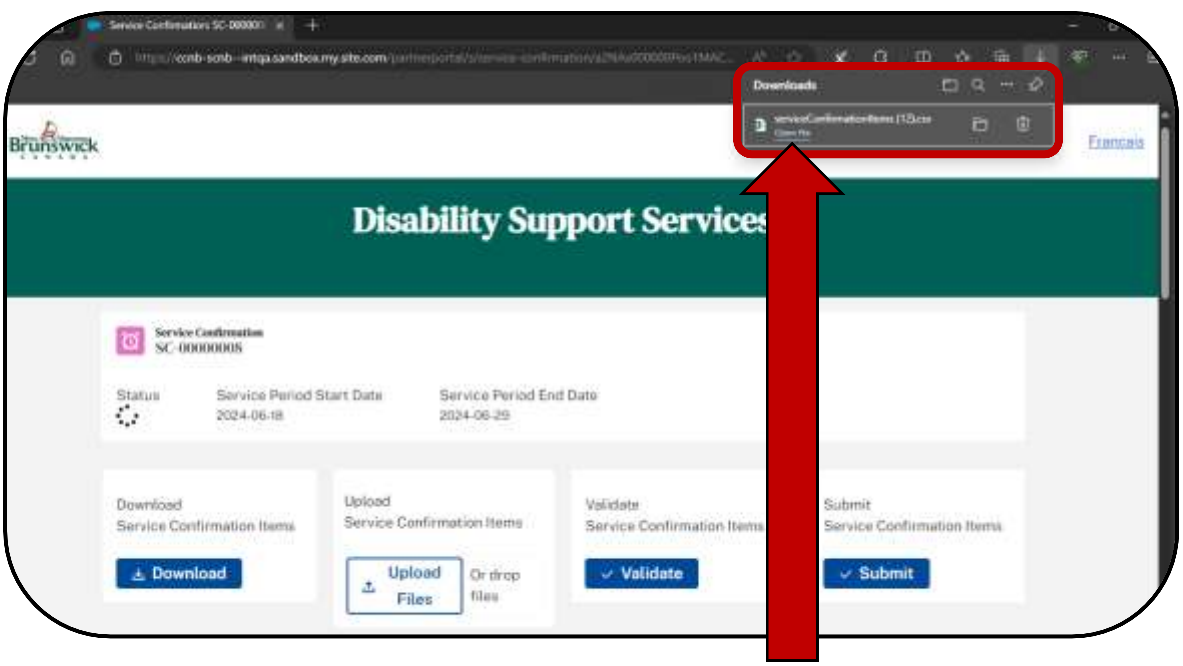


How to Download Service Confirmation Items & Provide Required Information (CSV)

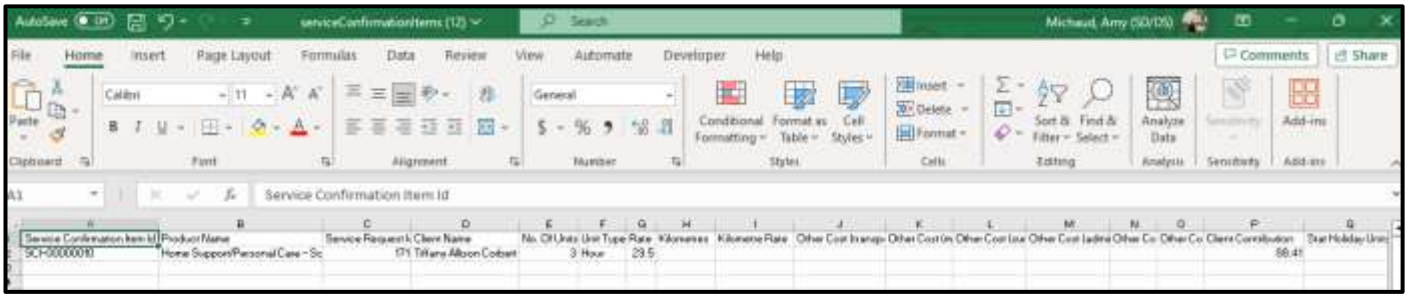
1. From the Service Confirmation (*draft*) window, select the **Download** pushbutton to download the **Service Confirmation Item file**.



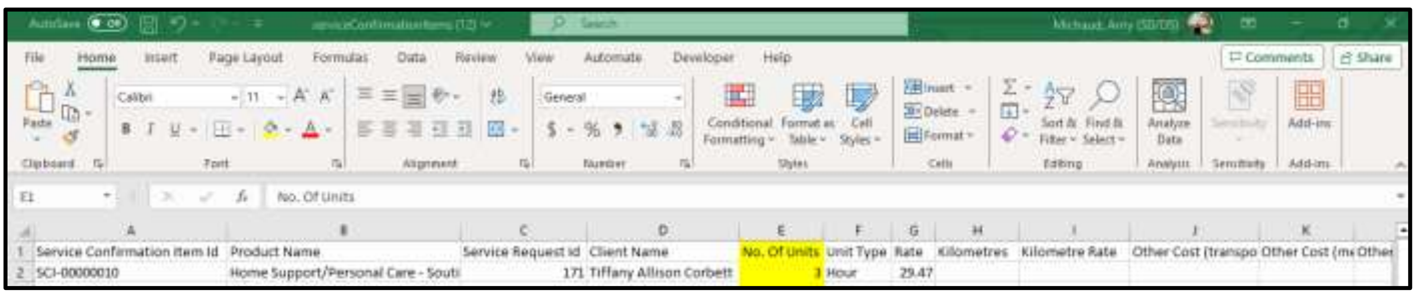
2. The **File** is downloaded. To **Open the File**, select the **Open File** hyperlink from the popup window in the top right corner of your browser.



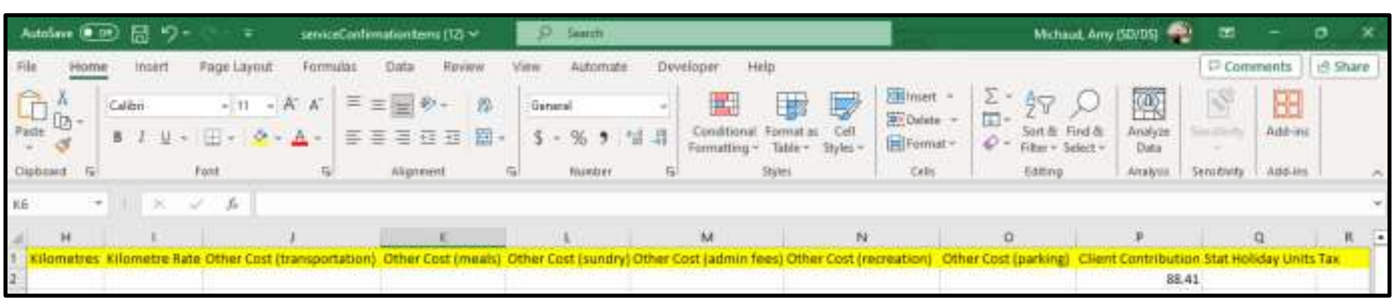
3. The file opens with the **Service Conformation Item ID**, **Product Name**, **Service Request ID**, **Client Name**, **Unit Type**, and **Rate** already filled in.



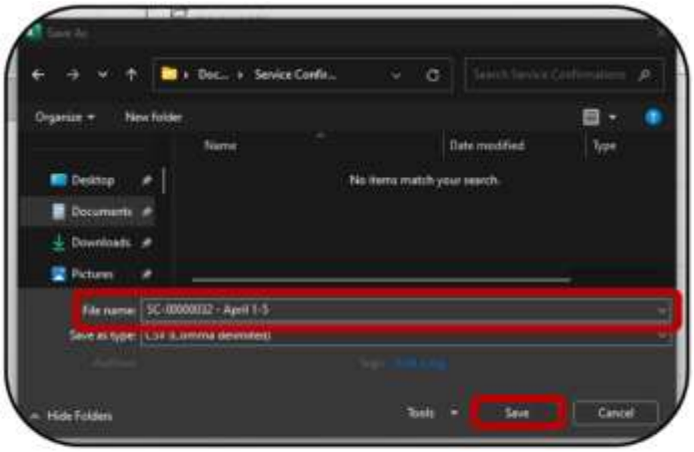
4. Enter the **No. of Units** (e.g., hours, days, etc.) that the client received for the indicated service period (e.g., week, month).



5. Enter any additional information within the spreadsheet, that is; you must fill in other costs (if approved), Stat. Holidays (if approved/included in service request), client contribution (if applicable/approved), GST/Tax. **Ensure that all fields/columns have been given a value (e.g., 0 if no value is applicable or exists), otherwise it will fail validation.**



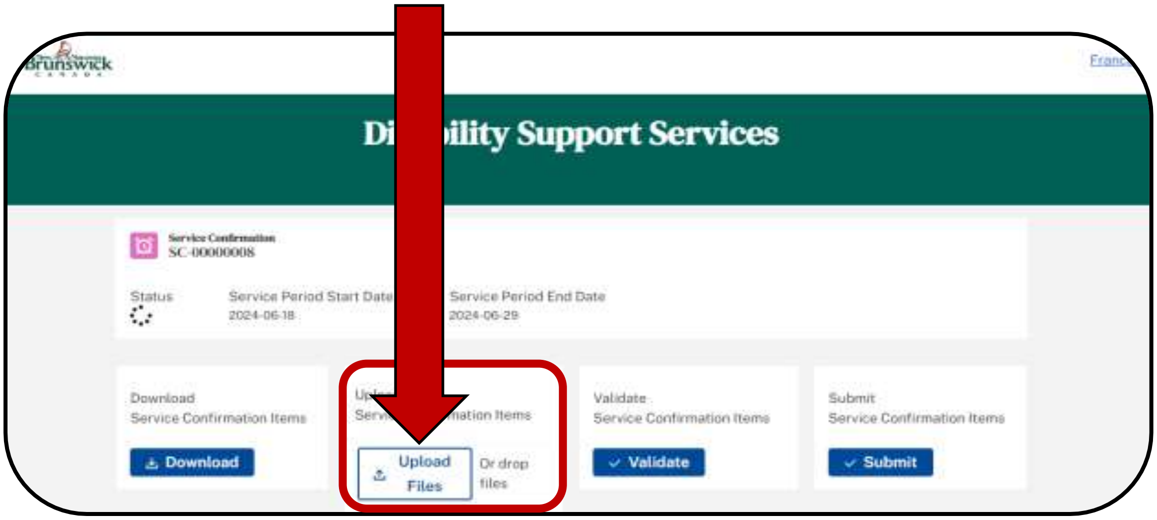
6. Save the File to your computer in a designated folder (e.g., Service Confirmations) and with an easily identifiable name, ensuring that the Service Confirmation ID is included (e.g., SC-00000032 - April 1-5). **Click Save**.



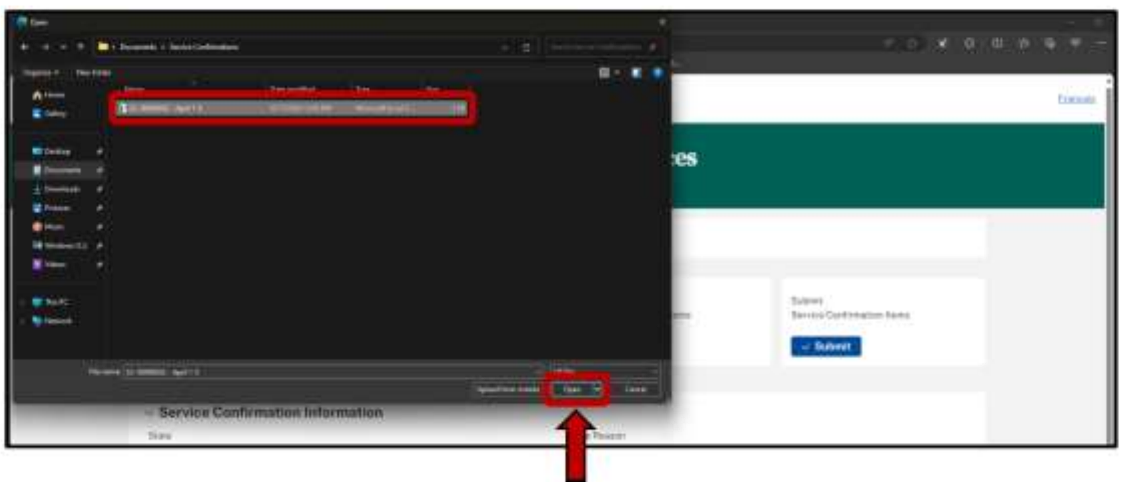
7. The Service Confirmation items are now captured, saved and ready to be uploaded to related Service Confirmation draft for information validation.

How to Upload Service Confirmation Items (CSV)

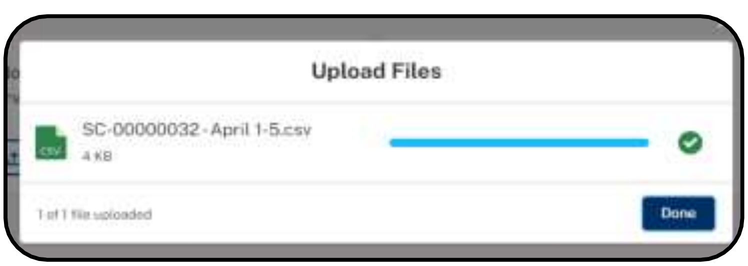
1. On the applicable Service Confirmation (*draft*) window, select the **Upload** pushbutton **OR** drag and drop the file.



2. **Locate** the Service Confirmation Items file and select **"Open"** to begin the upload process.



3. Wait for the **Green Checkmark**, signaling that the file has successfully uploaded, and click the **Done** pushbutton.

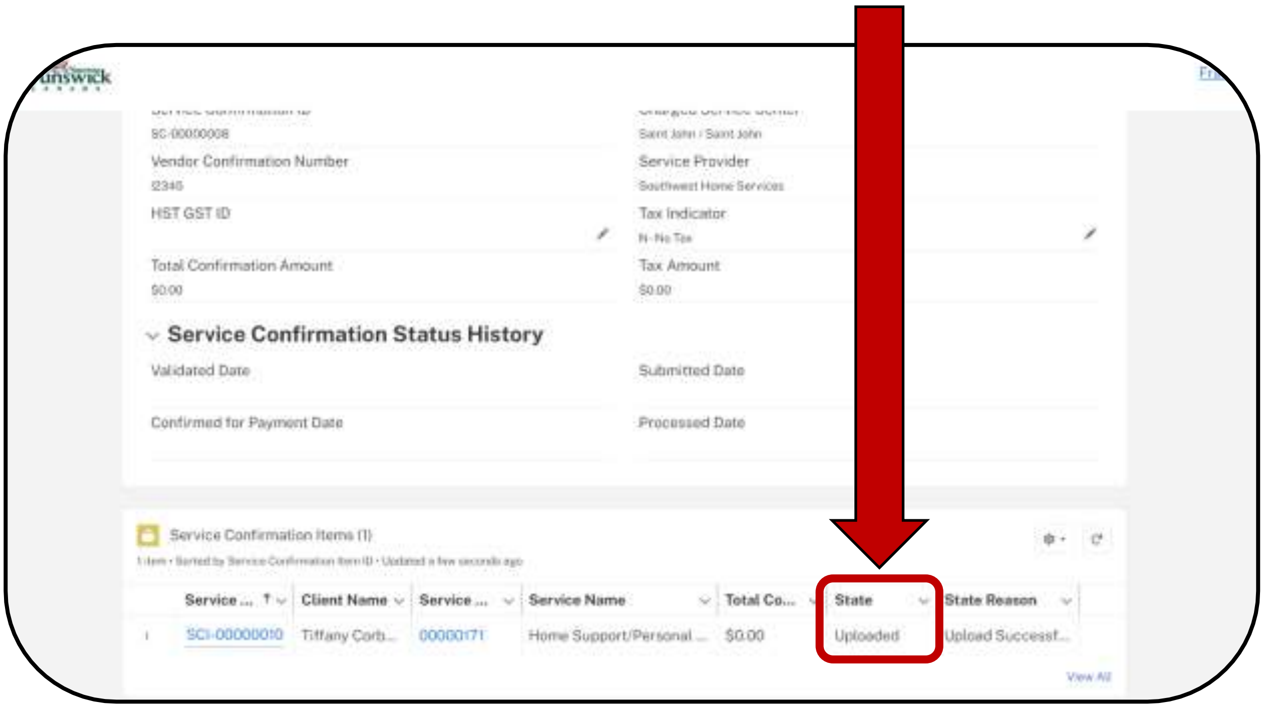


NOTE: You will receive an error message if:

a. Uploaded the wrong CSV file to a Service Confirmation

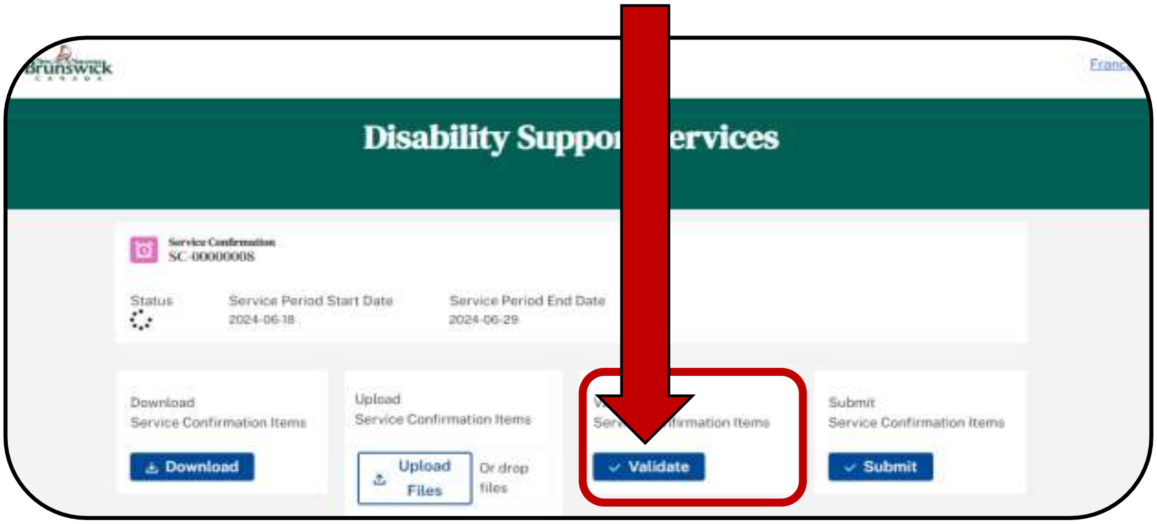
4. A confirmation message appears.

5. Scroll down and locate the Service Confirmation Items field. The **State** for each item will now display “uploaded”.

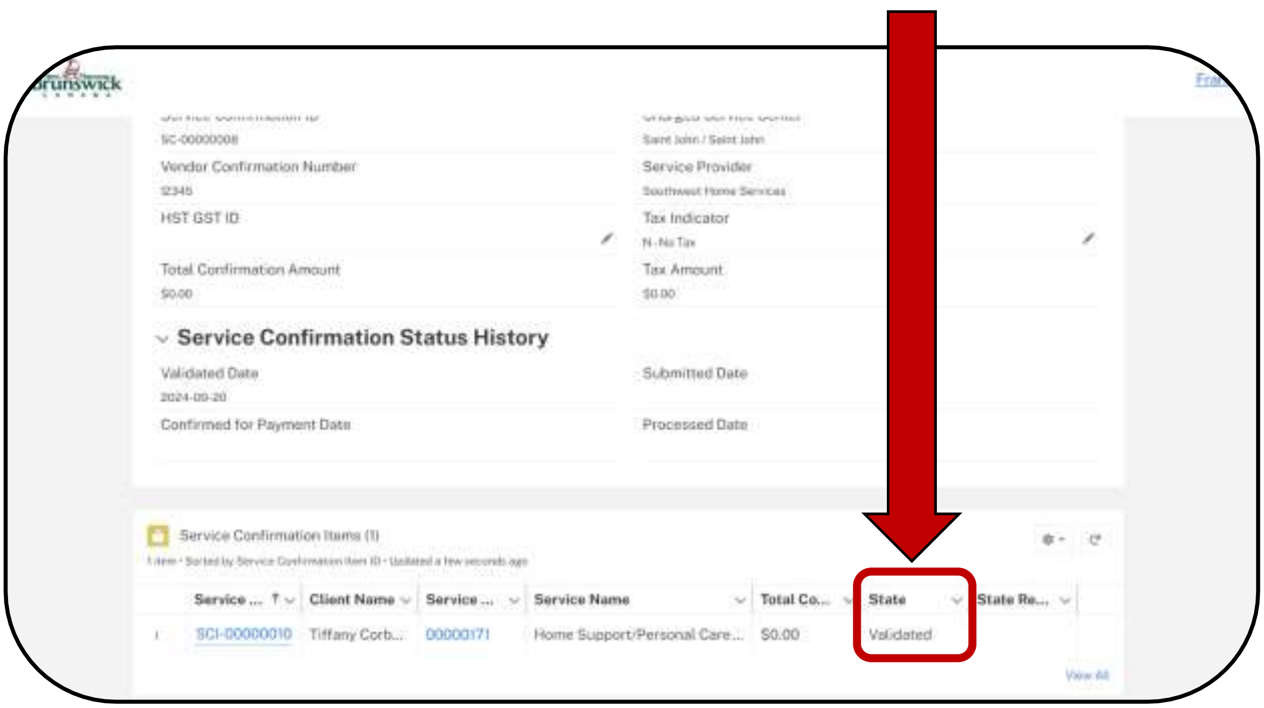


Validating Service Confirmation Items

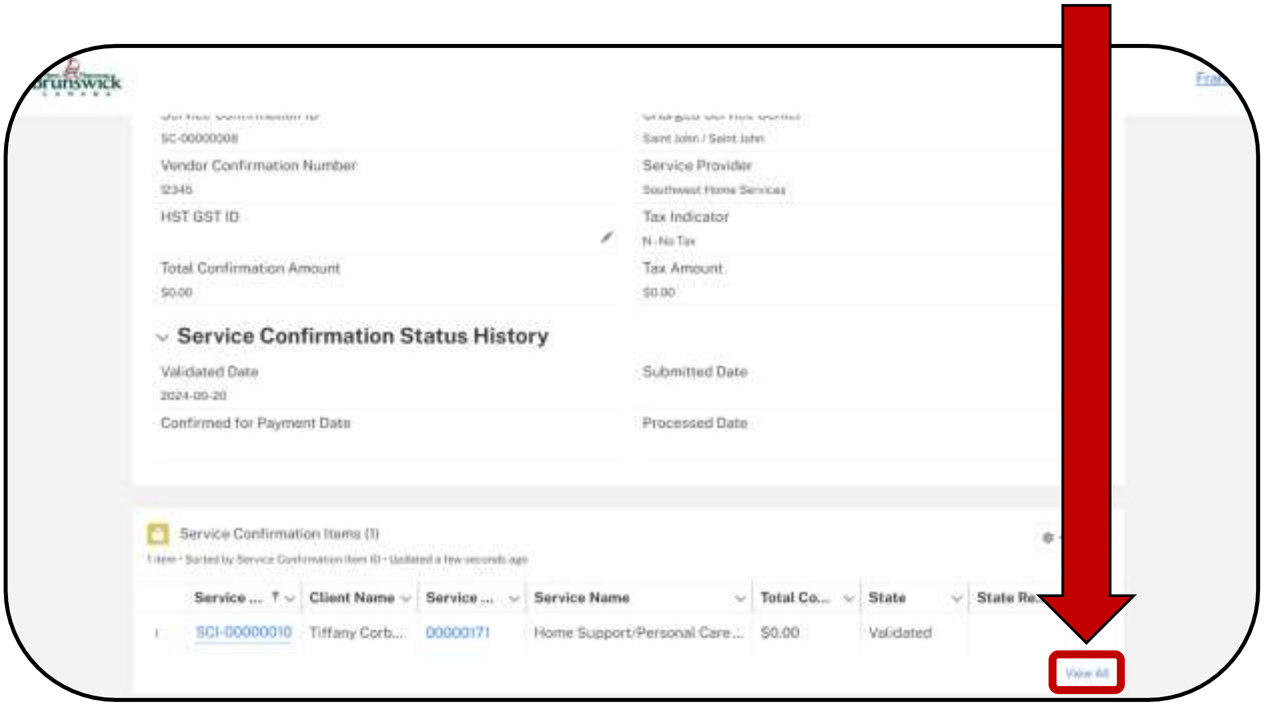
1. Once all items are up to date and the information provided is ready to be validated (e.g., the correct number of hours were entered into the Service Confirmation Items document), select the **Validate** pushbutton.



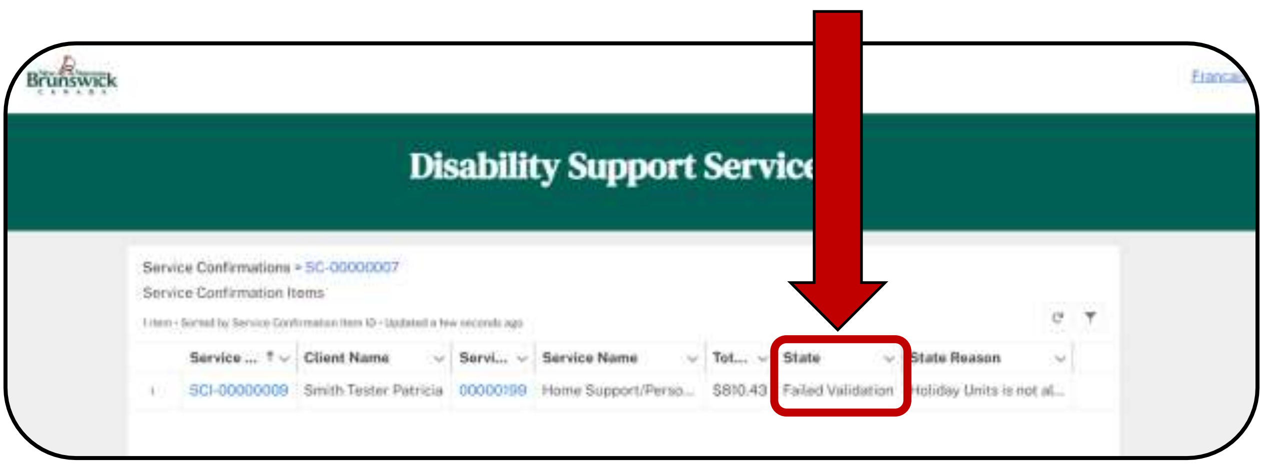
2. The page will refresh changing the **State** of all service confirmation items.



3. If multiple Service Confirmation Items have been submitted, and not all displayed in the Service Confirmation Items field, select **View All**. This will display a list of **all** related service confirmation items.



4. Review the **States** of all service confirmation items. Verify any items with a state of ***Failed Validation*** (re: Failed Validations).

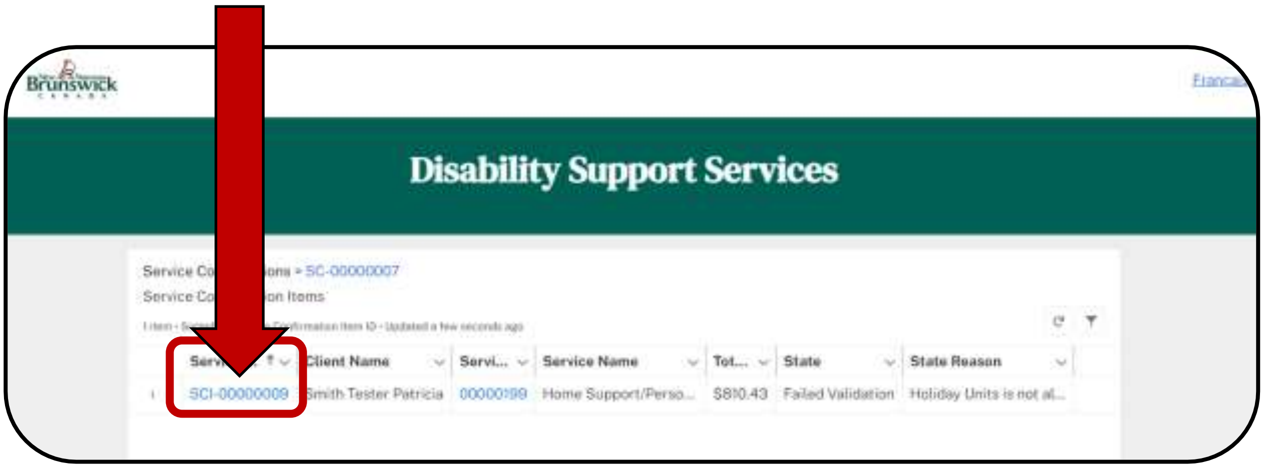


TIP: Click the ***State*** column header to sort the list – it will place all Failed Validations together.

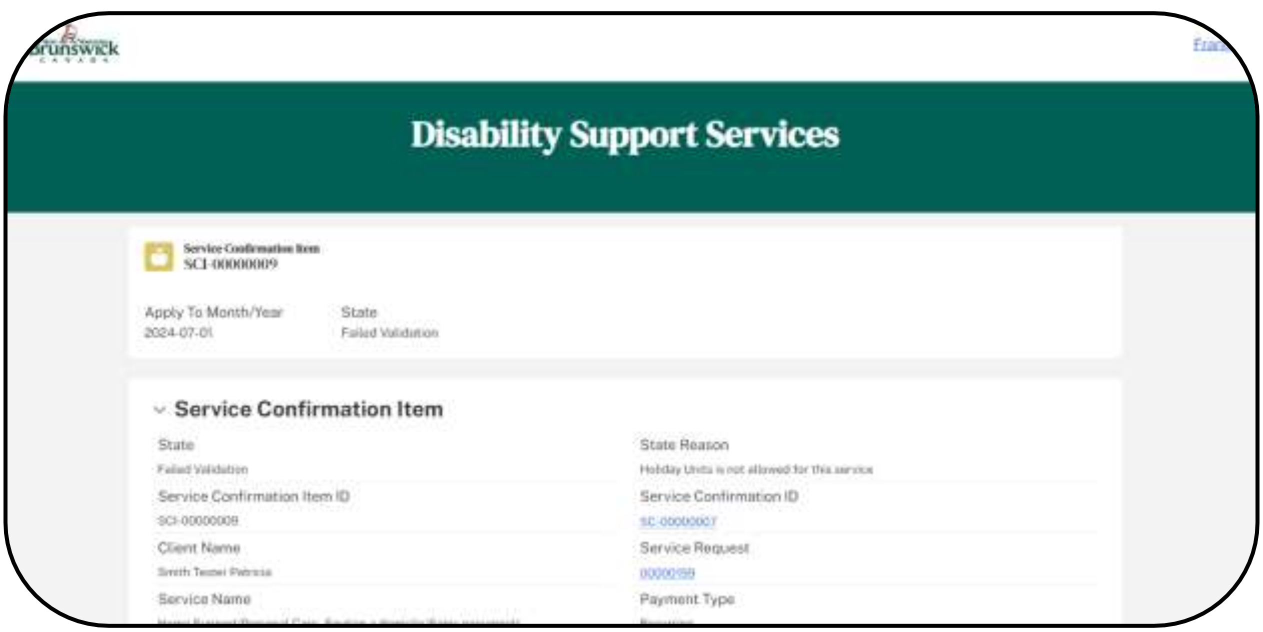
Failed Validations

When a validation fails, you will need to open the service confirmation item to view the reason it failed. Follow the steps below to open and view failed validation items. **NOTE:** If an Service Confirmation Item fails validation due to a 0$ value, the service confirmation can still be submitted.

1. From the Service Confirmation Items list (re: ***step 3: view all***), select the **Failed Validation SC item number**.

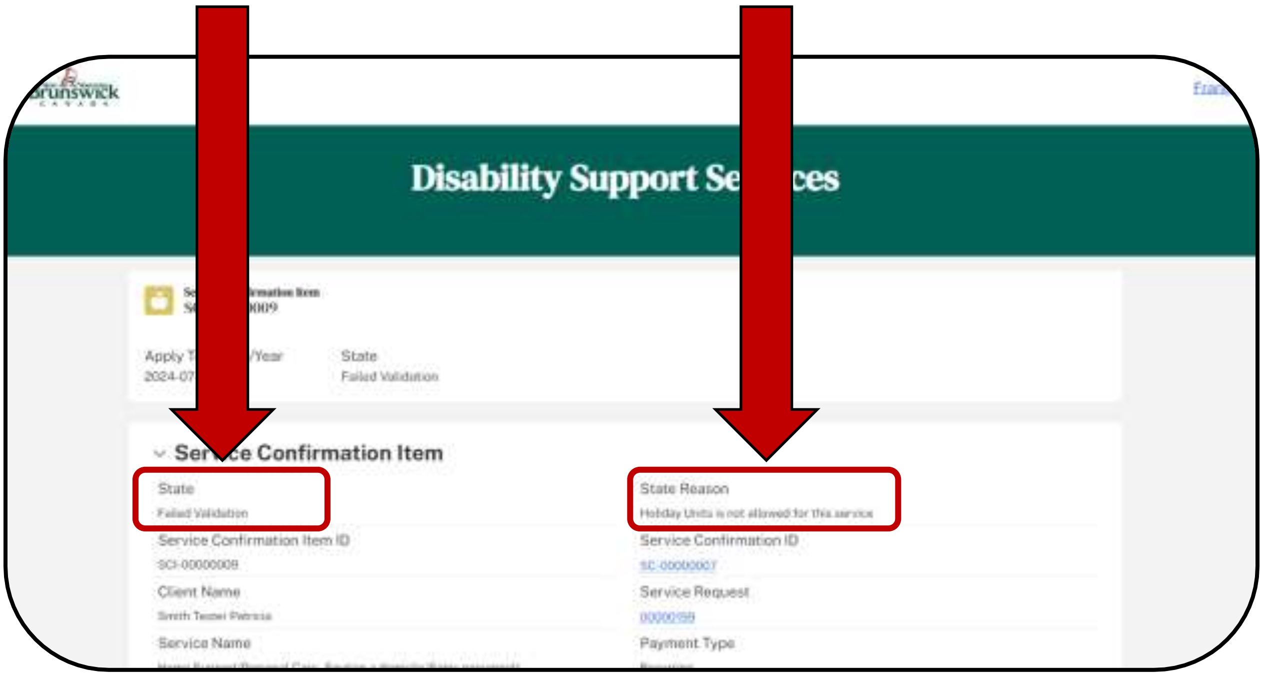


2. Service Confirmation Item details are displayed.



3. Locate the **State** and **State Reason**.

   IMPORTANT: The **State Reason** will provide you an explanation for why the item failed. This will help guide you to make the necessary correction.



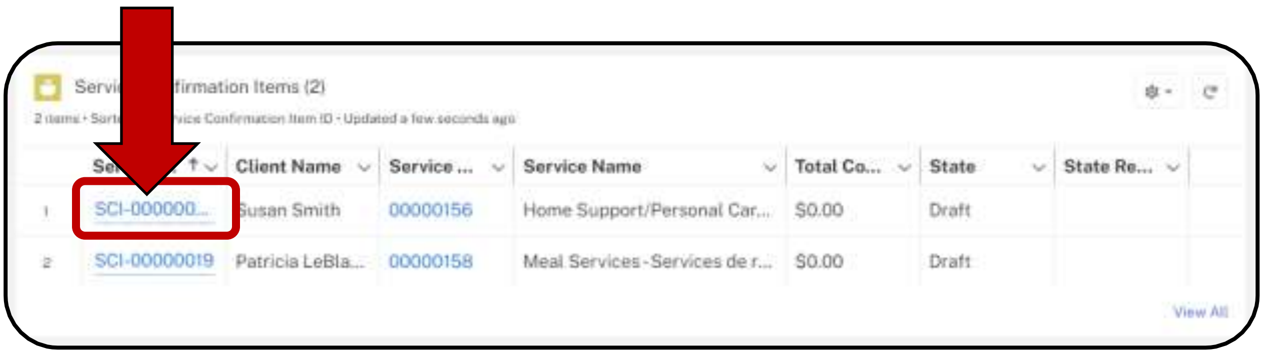
4. Re: [Errors & Failed Validation List](#) below to learn how to fix/correct a failed validation.

IMPORTANT: Different action will be taken depending on the failed validation. If information was entered incorrectly (e.g., wrong number of hours), the information can be adjusted (see steps below). If follow up is required with Social Development (e.g., discrepancy between our records), you may need to confirm the service at a later time but continue with submitting the remaining services.

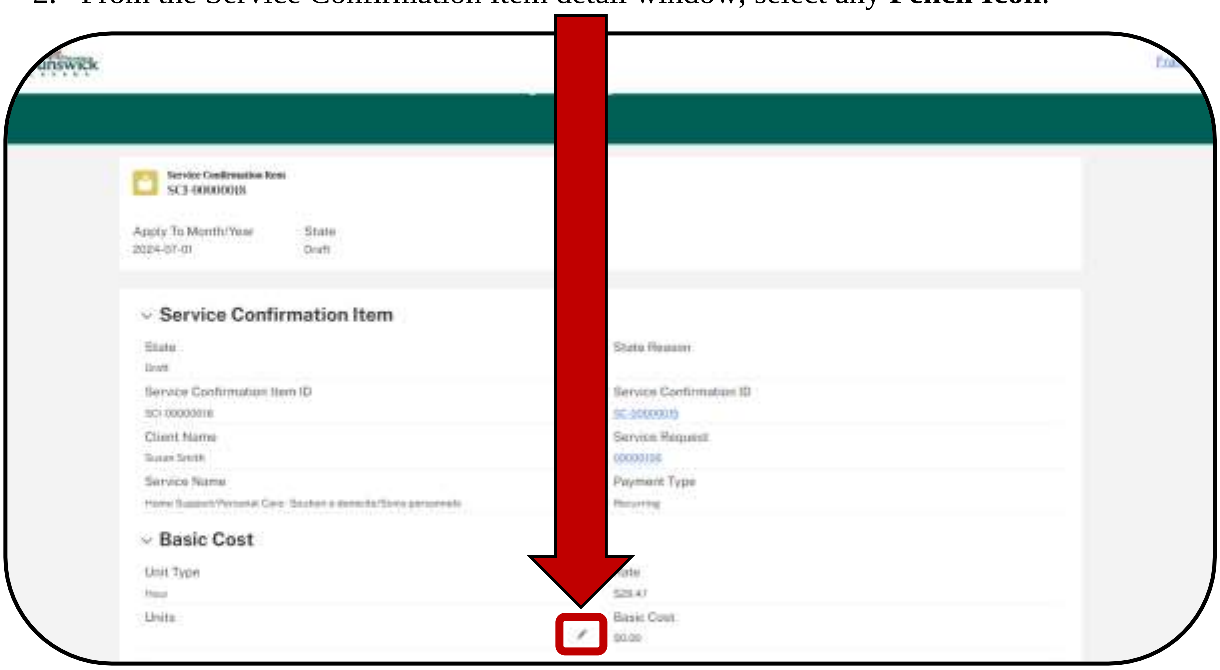
Capture/Modify Service Confirmation Items

If the amount of Service Request Items is small (e.g., 2 Service Confirmation Items), rather than downloading and uploading the CSV CommunityCareNB also allows for the information to be entered manually. Additionally, Service Confirmation Items can be edited in the event that updates to a Service Confirmation Item need to be made. Refer to the Service Request to review details of what has been approved by Social Development for payment. If a Service Request needs to be changed, contact the SD worker associated with the service request and log a Change Request. If a change is required a NEW service request will be issued.

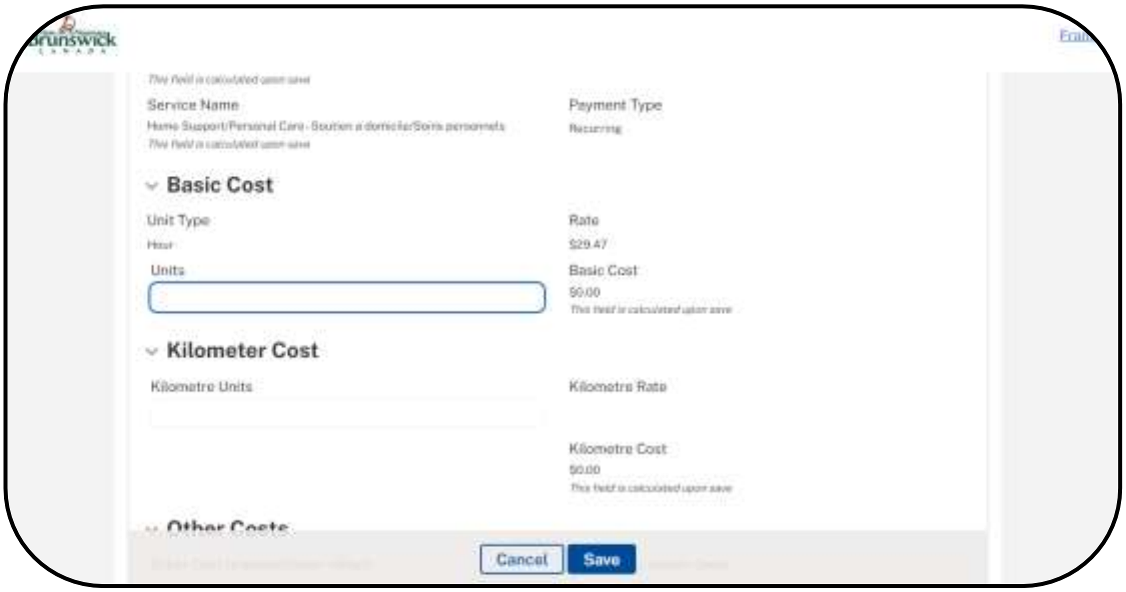
1. From the Service Confirmation Items field or list (re: ***step 3: view all***), select the applicable **Service Confirmation Item Number**.



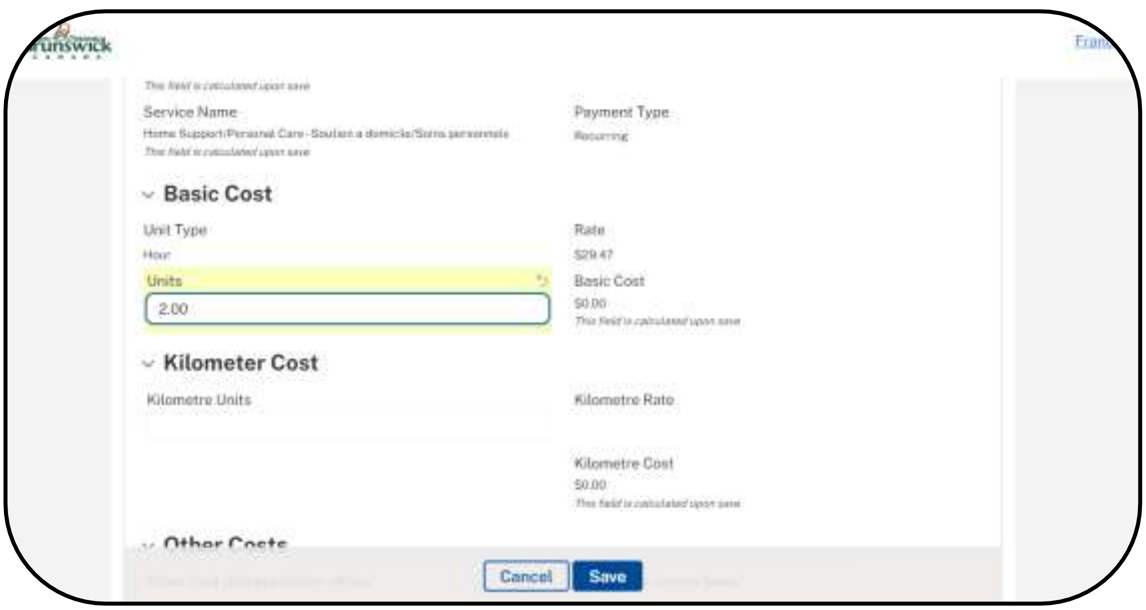
2. From the Service Confirmation Item detail window, select any **Pencil Icon**.



3. All editable/modifiable fields are now free to make changes.



4. Input the information into the applicable fields and **click Save**. The captured information has been saved.



NOTE: You will receive an error message if:

a. Units or Stat Holiday Units are not entered in quarter, half or whole units (e.g., **quarter units: 3.25 / 3.50 / 3.75**).

Errors & Failed Validations

Type	State Reason (Error)
Validations for Upload	File is not in CSV format
Validations for Upload	File header is not correct
Validations for Upload	Upload doesn’t match downloaded file template
Validations for Upload	Data type mismatch has occurred.
Validations for Upload	[column name] has a mismatch on column type
Validations for Upload	Record missing from upload file

• Type	• State Reason (Error)
Validations for Service Confirmations (SC)	• Vendor Confirmation Number is missing.
Validations for Service Confirmations (SC)	• Vendor Confirmation Number must be unique.
Validations for Service Confirmations (SC)	• Missing tax indicator
Validations for Service Confirmations (SC)	• Missing HST GST ID
Validations for Service Confirmations (SC)	• Negative value is entered for a field

Type	State Reason (Error)	Defined
Validations for Service Confirmation Item (SCI)	Service request is still active.	Service Request has not been cancelled since the Service Confirmation was created
Validations for Service Confirmation Item (SCI)	Service Request is no longer active in the service period submitted.	**Scenario: since downloading - the Order has been terminated.** • Today's date - Feb 16, • Downloaded on Feb 12 for Orders in service period Feb 1 - Feb 9. • Order 12345 was included in the download with service dates July 1, 2023 - June 30, 2024 • On Feb 14 - Social Worker received info to terminate this order as of Jan 31st • Order End Date is now Jan 31, 2024, which is less than the Apply To Month/Year (Feb 1, 2024) on the Service Confirmation.
Validations for Service Confirmation Item (SCI)	Client Contribution: 1. Client Contribution must be equal or less than Client Contribution recorded on the Order.	**IF** the Basic Cost on the Service Confirmation Item is less than the 'remaining client contribution of the month', **THEN** Client Contribution Amount entered should be equal to the 'Basic Cost on Service Confirmation Item'.
Validations for Service Confirmation Item (SCI)	Client Contribution: 2. Client Contribution is equal to Basic Cost	**IF** the Basic Cost on the Service Confirmation Item is less than the 'remaining client contribution of the month', **THEN** Client Contribution Amount entered should be equal to the 'remaining client contribution of the month'.

Validations for Service Confirmation Item (SCI)	Basic Cost must be less than maximum monthly basic cost minus the already submitted basic cost	**IF** the Basic Cost on the Service Confirmation Item is <u>not</u> 0, **THEN** if <u>must</u> be less than the Monthly Max Basic cost amount minus the already submitted basic cost.
Validations for Service Confirmation Item (SCI)	Kilometer Cost must be equal or less than maximum monthly kilometer cost minus already submitted kilometer reason	**IF** the Kilometer Cost on the Service Confirmation Item is not 0, **THEN** it <u>must</u> be equal to ***or*** less than the Monthly Max Kilometer cost minus the already submitted kilometer cost. Example: Monthly Max Kilometer amount = $500, • 2 SC Items were previously submitted for Feb 1-9th for $200 & Feb 10-23rd for 200 (total = $400) • if Kilometer Cost of SC Item being validated is for Feb 24-29 for $100 - this is OK (400+100 is <or = Monthly Max Kilometer 500) • if Kilometer Cost" of SC Item being validated is for Feb 24-29 is greater than $100 - this is a fail.
Validations for Service Confirmation Item (SCI)	Kilometer has a mismatch on field type.	Kilometer Units must be entered as whole numbers (e.g., 150). The system will **<u>not</u>** validate decimal numbers (e.g., 150.26).
Validations for Service Confirmation Item (SCI)	Other Costs must be equal or less than maximum monthly Other Costs minus already submitted Other Costs Other Costs could be • Other Cost (transportation-other) • Other Cost (sundry) • Other Cost (meals) • Other Cost (admin fees)	Example: Monthly Max Other Costs amount = $300 • 2 SC Items were previously submitted for Feb 1-9th for $125 & Feb 10-23rd for 125 (total = $250) • if 3rd confirmation is for Feb 24-29 for $50 - this is OK (250+50 is

	• Other Cost (parking) • Other Cost (recreation)	less or = Monthly Max Other Costs 300) • if 3rd confirmation is for Feb 24-29 is greater than $300 - this is a fail
Validations for Service Confirmation Item (SCI)	“Stat. Holiday Units” cannot be recorded if the Basic Cost is $0	**IF** the Units on the Service Confirmation Item equals 0, **THEN** Stat. Holiday Units on the Service Confirmation Item must equal 0.
Validations for Service Confirmation Item (SCI)	“Stat. Holiday Units” must not exceed the No. of Units	**IF** Stat. Holiday Units on the Service Confirmation Item is greater than 0, and **IF** Stat. Holiday Units on Service Confirmation Item is greater than Units on Service Confirmation Item, **THEN** Service Confirmation Item will fail validation.
Validations for Service Confirmation Item (SCI)	“Stat. Holiday Units” is not allowed for this service	**IF** Stat. Holiday Units on the Service Confirmation Item is greater than 0, and **IF** Order/Service Request Type/Pay Statutory Days is not equal to Y **THEN** Service Confirmation Item will fail validation.
Validations for Service Confirmation Item (SCI)	“Stat. Holiday Units” is incorrect (max 24)	**IF** Stat. Holiday Units on the Service Confirmation Item is greater than the allowable stat. holiday units, **THEN** Service Confirmation Item will fail validation.
Validations for Service Confirmation Item (SCI)	Tax Amount is incorrect	**IF** Tax Amount on Service Request Item is greater than 0, **AND** Tax Indicator is F, **AND** Tax amount is not 15% of Basic Cost of Service Confirmation Item being validated,

		THEN Service Confirmation Item State will fail validation.
Validations for Service Confirmation Item (SCI)	Departmental Cost cannot be a negative amount	**IF** Departmental Cost on the Service Confirmation Item is less than 0, **THEN** the Service Confirmation Item will fail validation.
Validations for Service Confirmation Item (SCI)	No value entered in the Service Confirmation Item	**IF** Service Confirmation is being updated **AND** the user inputs a '0' or blank for **all** following fields in an SCI: • Units (Basic Cost) • Kilometer Units • Other Cost (Transportation – Other) • Other Cost (admin fees) • Other Cost (meals) • Other Cost (recreation) • Other Cost (sundry) • Other Cost (parking) **THEN** Service Confirmation Item will fail validation
Validations for Service Confirmation Item (SCI)	Negative value is entered for a field	N/A

Submitting Service Confirmations

Before officially submitting a Service Confirmation, you will have the following options:

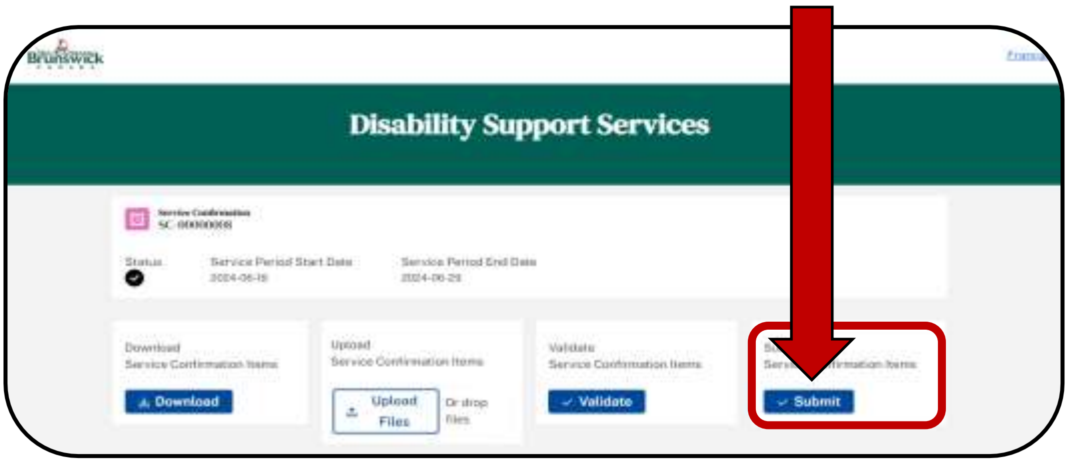
1. If all items passed the validation step, you can submit the Service Confirmation.
2. If there are any failed validation items, you can:
   a) Make changes immediately, repeat the validation process, then submit validated service confirmations.
   b) Make changes later once the issue has been resolved (e.g., wrong unit amount entered). Repeat the service confirmation process, however, this time you will not select all, but **select only the service confirmations** that did not validate from a previous confirmation submission. You must repeat reporting and validation steps prior to submission., or
   c) If an item failed validation due to discrepancies in service (e.g., unit amounts), you can Log a Change Request. If the SD worker needs to make a change, a new Service Request will be issued, approved and activated. If a new service request is issued, the original service will no longer be active.
3. Submit and include any outstanding items in the next Service Confirmation batch.

VERY IMPORTANT: If an error/problem is detected on a service confirmation after you have submitted it, **do not** attempt to resubmit it. **Always** contact the support team to correct any errors/problems found on a service confirmation after you have submitted it. **Do not resubmit your request - this could be construed as fraud**.

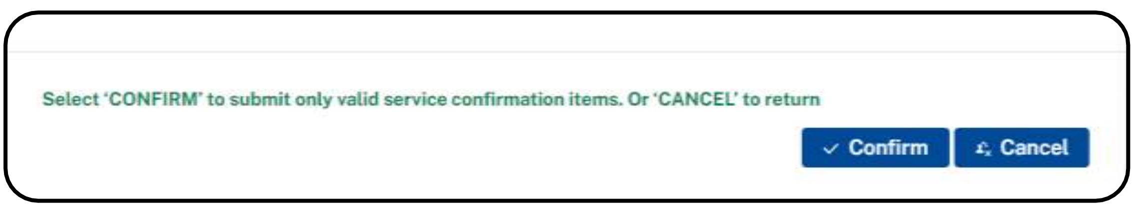
How to Submit Service Confirmations

When you are ready to submit a Service Confirmation ensure that you have properly uploaded a CSV or manually input Service Confirmation Items, that the items have been validated and corrections (if applicable) made. **If corrections are unable to be made, you will still be able to submit the Service Confirmation and include any outstanding items in the next Service Confirmation batch.**

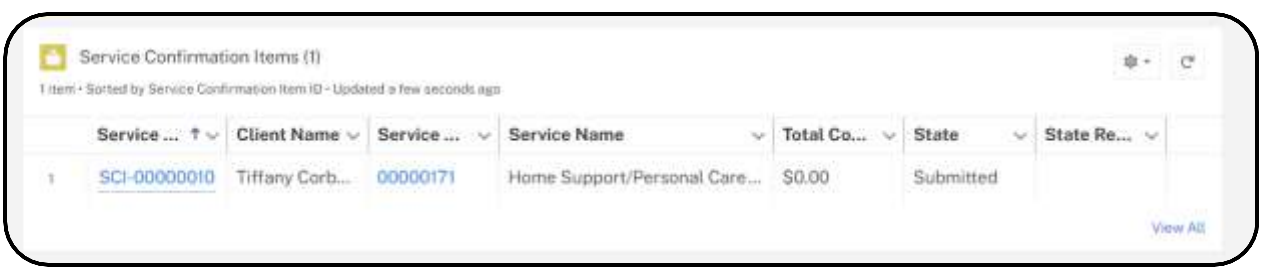
1. On the Service Confirmation, select the **Submit** button.



2. Regardless of whether all Service Confirmation Items have been validated, you will be asked to **Confirm** that ***only*** valid Service Confirmation Items will be submitted. **Select Confirm**.



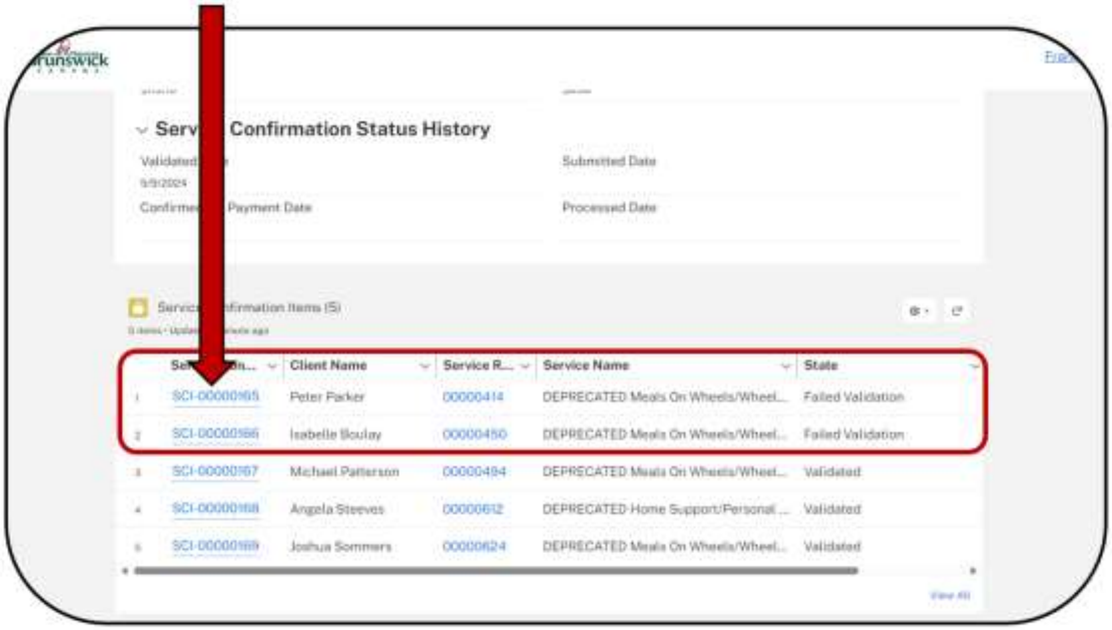
3. The window will refresh, and the **State** of the Service Confirmation Items now say **Submitted**.



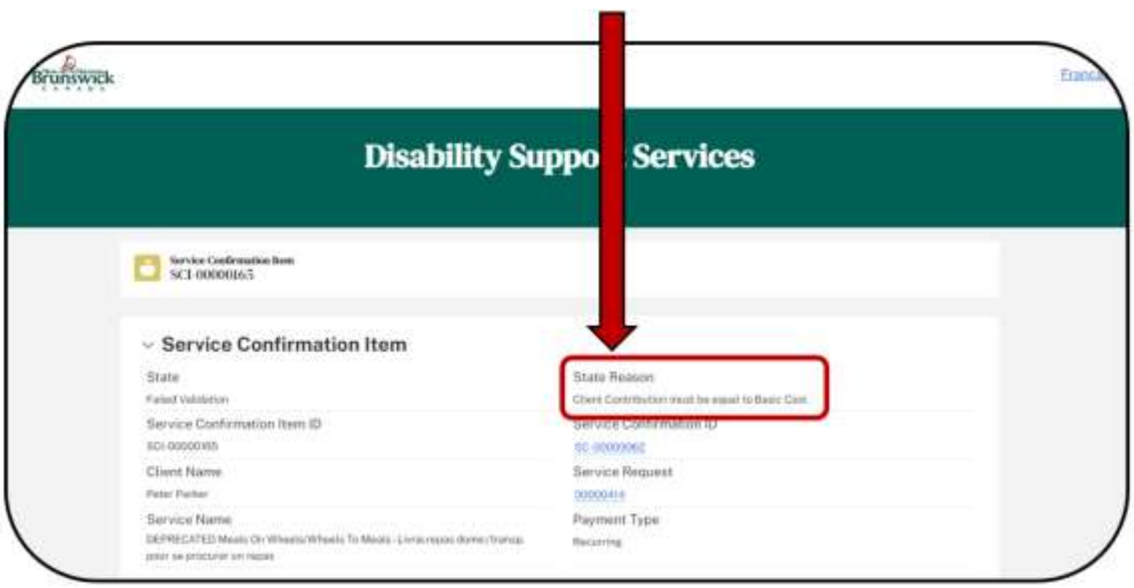
Correcting & Resubmitting Failed Validation Items

When an Item has failed validation, it will need to be resolved (if possible) before validating and resubmitting the Service Confirmation.

1. **Locate** and **Open** the Failed Validation Item(s).



2. **Locate** the **State Reason** for the failed validation. This will help you to identify and resolve the failed validation accordingly.



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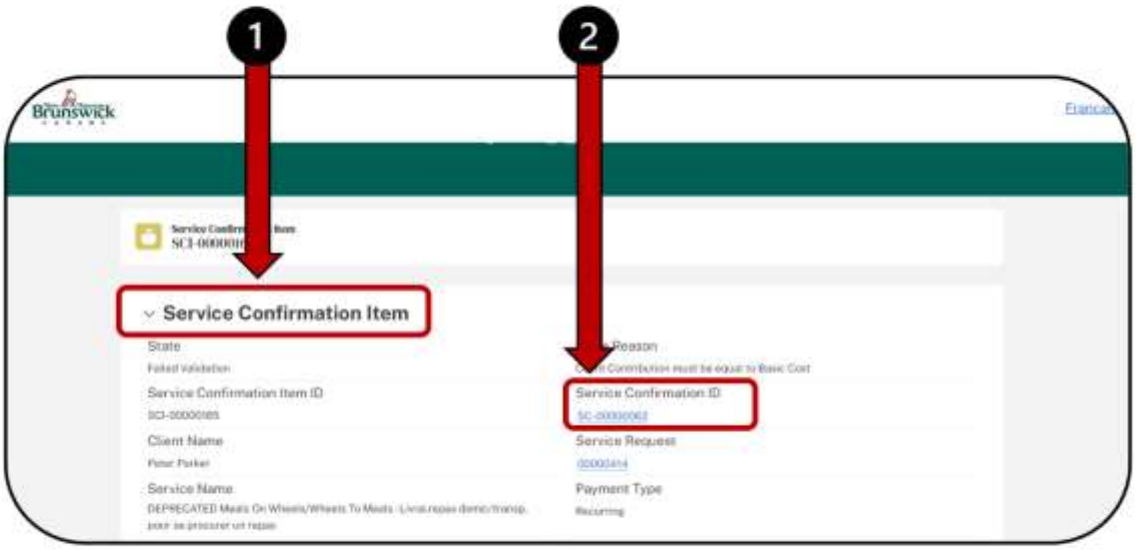
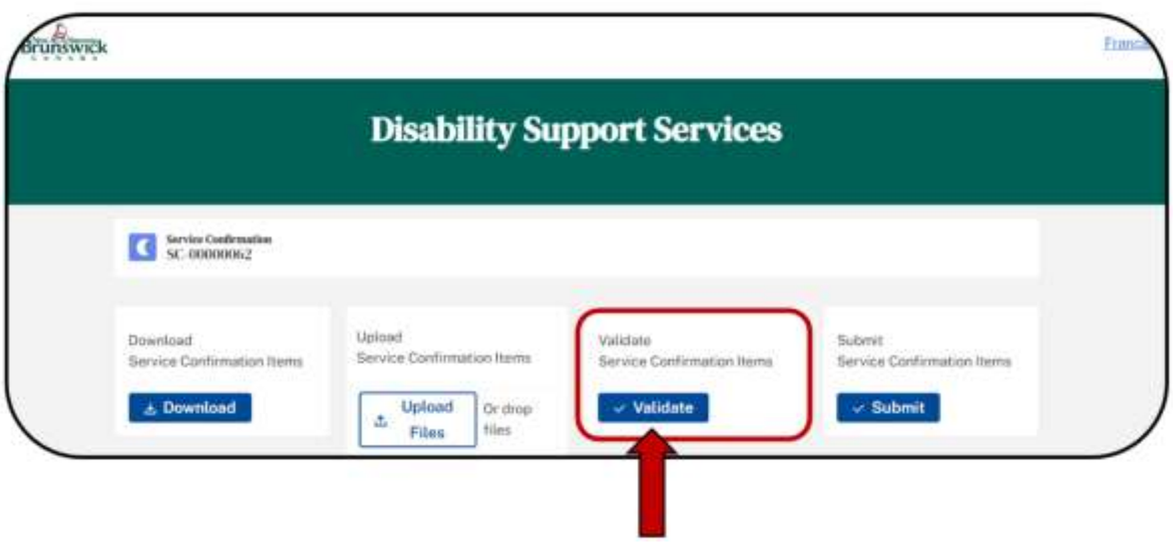
3. **Make the correction(s)** (re: Errors & Failed Validations list above and Capture/Modify Service Confirmation Items for more information on how to appropriately resolve and make corrections to items).

4. Once the correction has been made, locate the Service Confirmation Item header and click on the **Service Confirmation ID** hyperlink. This will bring you back to the Service Confirmation List where you can validate again.

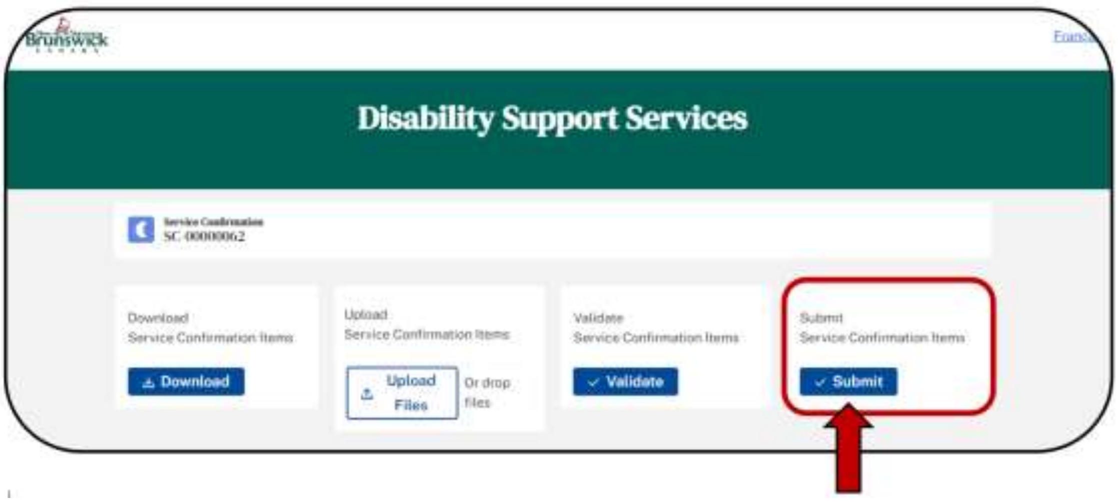


5. Select the **Validate** button to verify any corrections made.

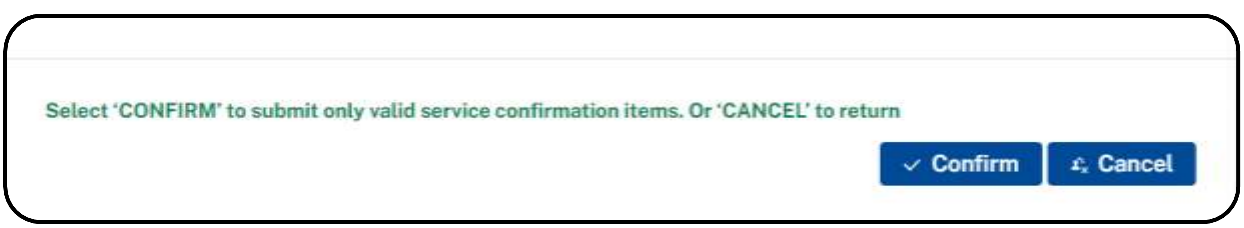


6. Verify that the Service Confirmation Items have been validated by scrolling down and checking the Items List.

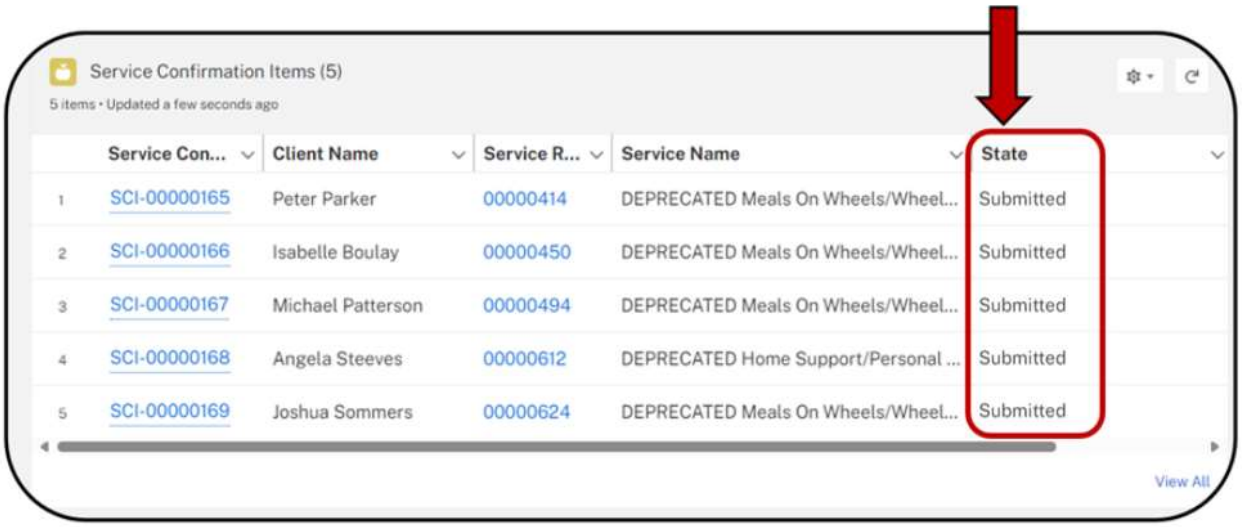
7. Return to the top of the page and **Select** the **Submit** button.



8. **Select Confirm**.



9. The window will refresh, and the **State** of the Service Confirmation Items now say **Submitted.**



Service Confirmation Items (5)

5 items • Updated a few seconds ago

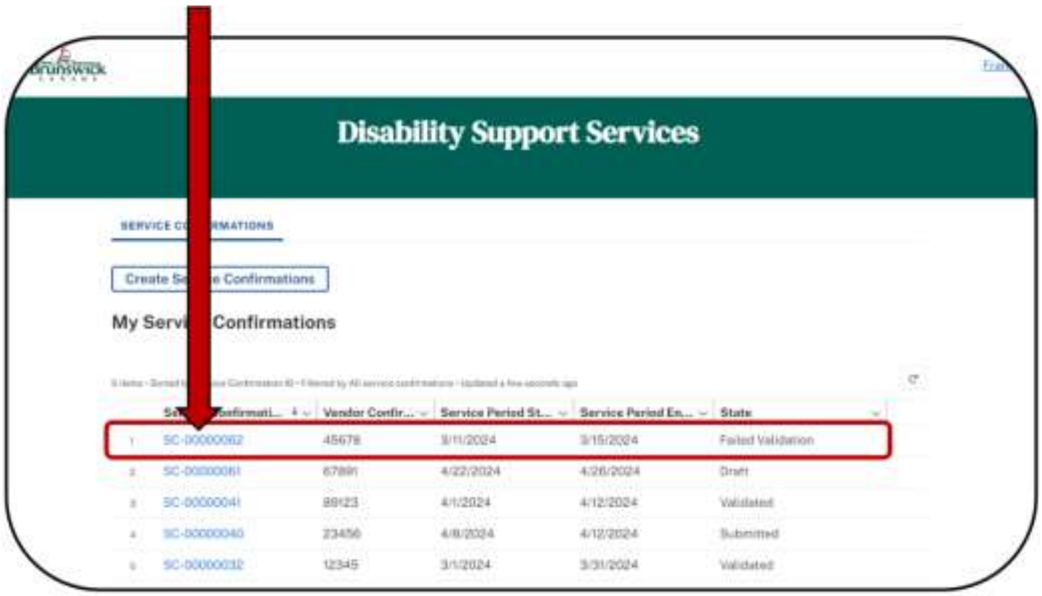
	Service Con...	Client Name	Service R...	Service Name	State
1	SCI-00000165	Peter Parker	00000414	DEPRECATED Meals On Wheels/Wheel...	Submitted
2	SCI-00000166	Isabelle Boulay	00000450	DEPRECATED Meals On Wheels/Wheel...	Submitted
3	SCI-00000167	Michael Patterson	00000494	DEPRECATED Meals On Wheels/Wheel...	Submitted
4	SCI-00000168	Angela Steeves	00000612	DEPRECATED Home Support/Personal ...	Submitted
5	SCI-00000169	Joshua Sommers	00000624	DEPRECATED Meals On Wheels/Wheel...	Submitted

View All

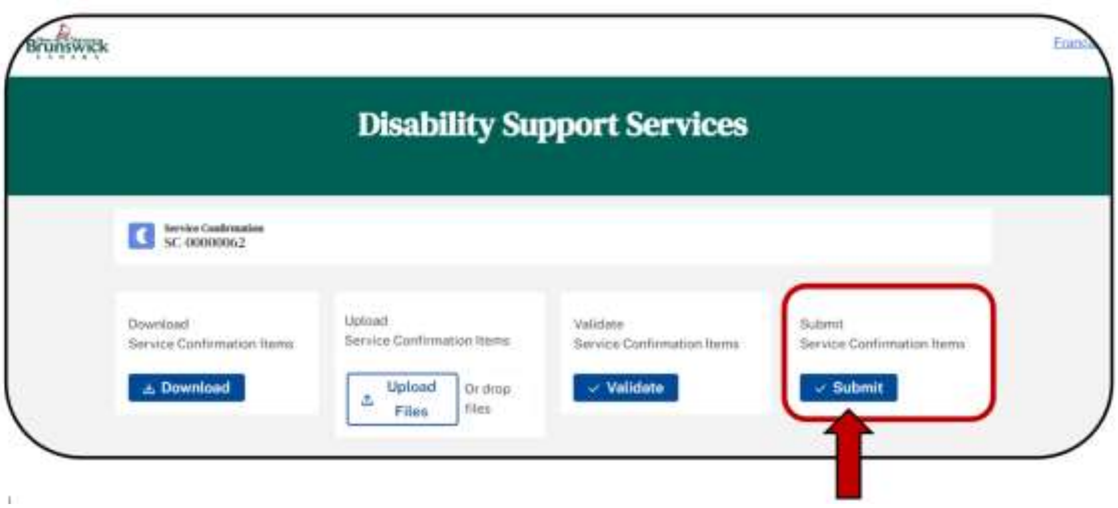
Submitting With Failed Validation Items

In the event that an Item cannot be corrected, you will still be able to submit the Service Confirmation and receive payments for the items that were validated. Include any outstanding item(s) in the next Service Confirmation batch.

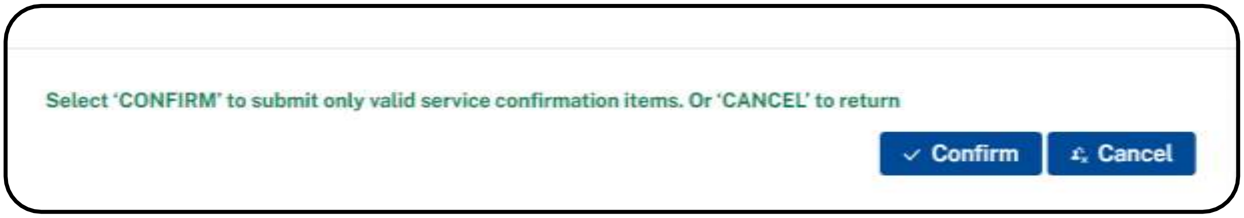
1. **Locate** and **Open** the Service Confirmation with a State of Failed Validation that is ready to be submitted.



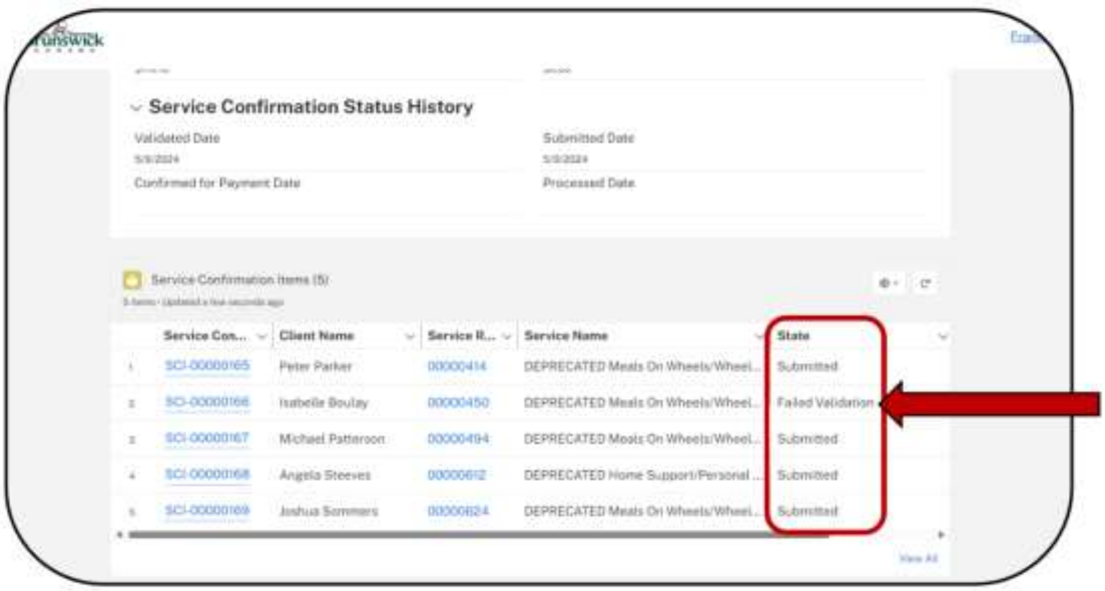
2. Once in the **Service Confirmation**, select the **Submit** button.



3. **Select Confirm**. This will tell the system to submit all validated Items.



4. The window will refresh, and the **State** of the Service Confirmation Items now say **Submitted.** Items that failed validation will continue to display a State of **Failed Validation**.

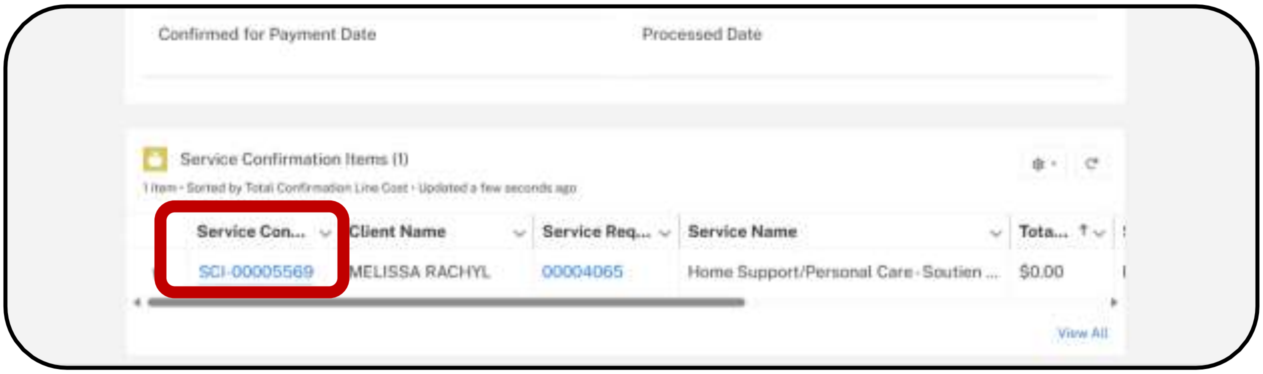


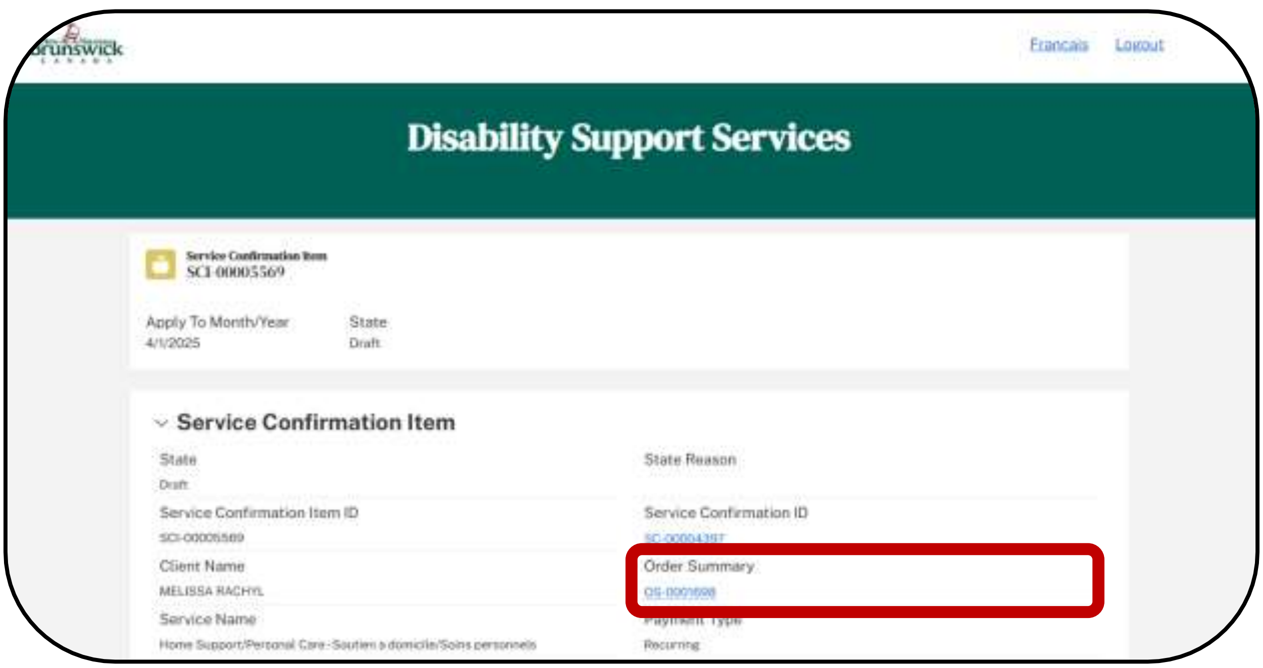
Log a Change Request

If you need to contact the SD worker to address a discrepancy, it is easiest to do so from within the system. If the service requisition needs to change, for example, you agreed to an increase in hours, but the service request does not reflect this change, you will need to contact SD. Once resolved, you will open the client's order summary and 'log a change request'. The example below shows how to open an order summary directly from the Service Confirmation Item.

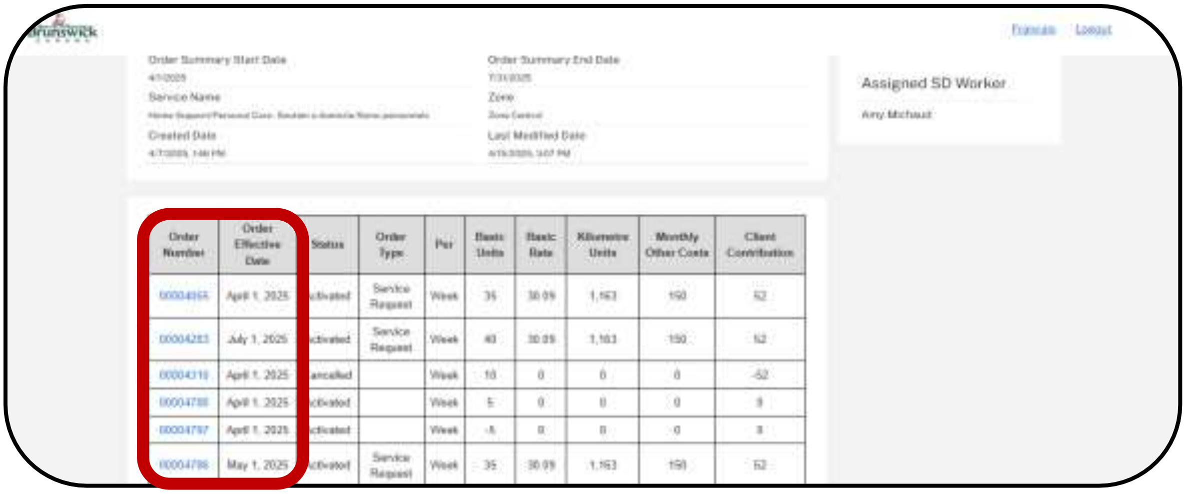
Note: These changes are done before sending for payment, and thus much easier to resolve.

1. Open the Order Summary from the applicable Service Confirmation Item (SCI) found on the Service Confirmation.



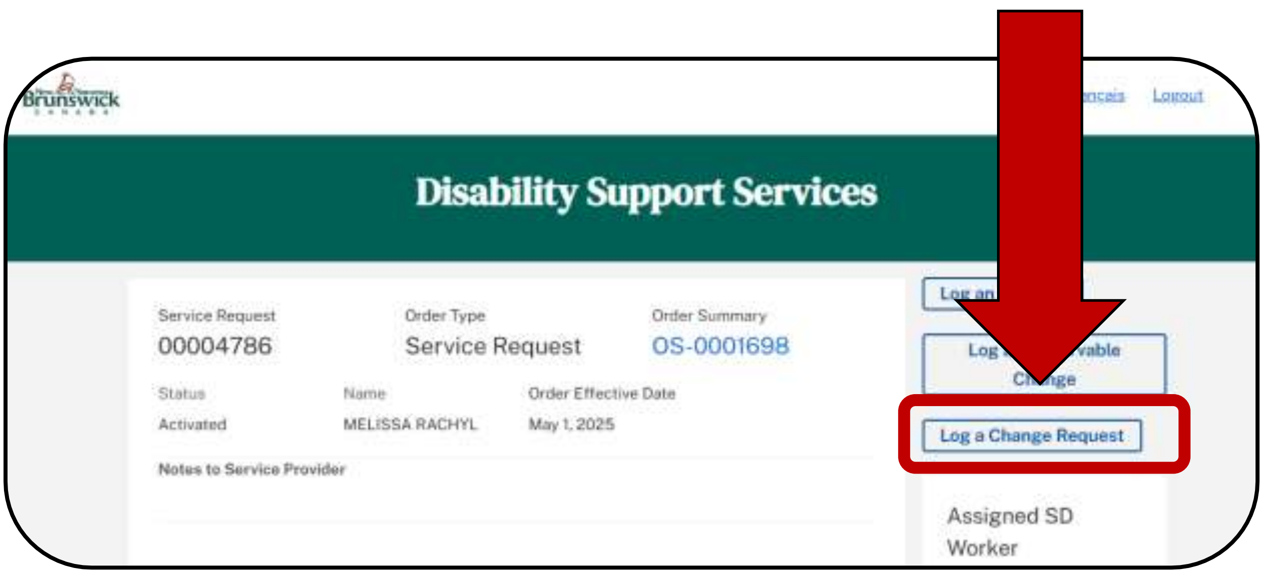


2. Locate and open the applicable Order Summary. Once on the Order Summary, scroll down to the **Order Table** and locate the applicable Order Number but referencing the **Effective Date** column.



3. The Order is displayed with a link to return to the Order Summary (blue text).

4. Select the **Log a Change Request** pushbutton.

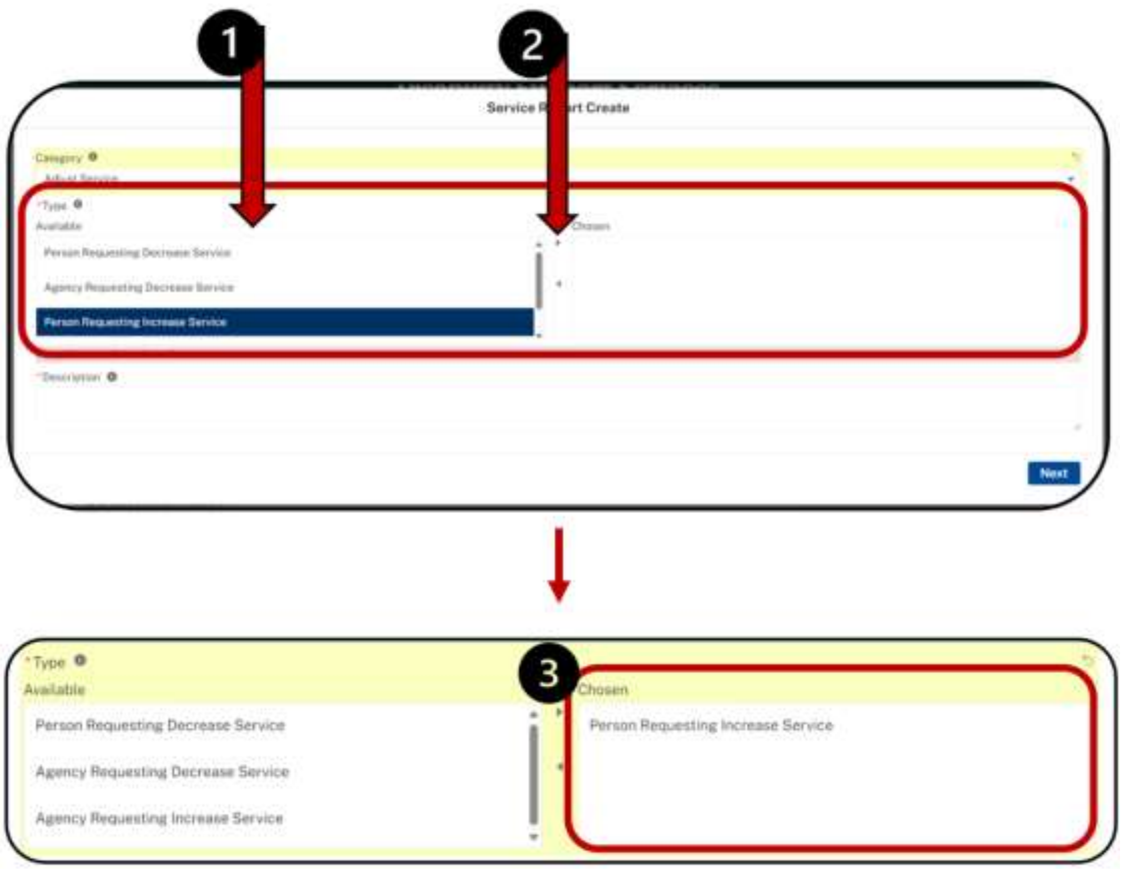


5. The Change Request Details pop-up window is displayed.

6. The Available types and mandatory fields that populate will differ based on the chosen Category in the dropdown menu (re: Adjust Service, Pause Service, End Service).

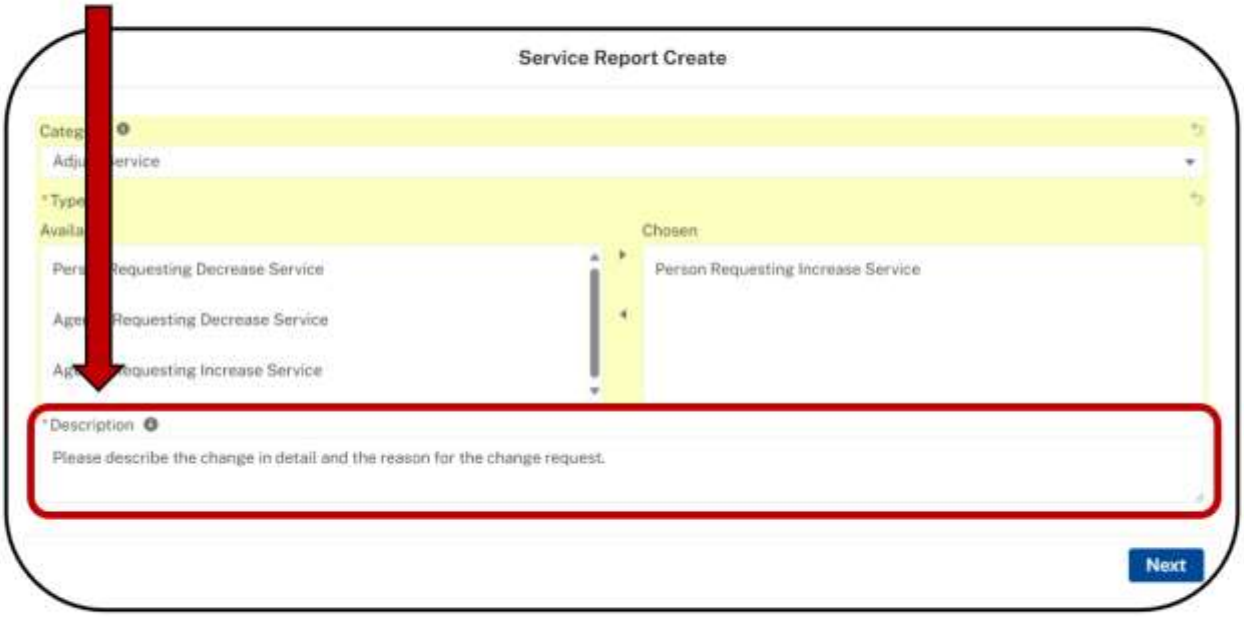
7. Select the applicable **Category**.

8. Select the provided **Change Request Type** (reminder: these are dependent on the category selected).



9. Provide a detailed description of the **Change Request**.

10. Click the **Next** pushbutton.



11. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

Notifications

A notification will be sent to the Service Provider when a change to a service request status has been made. An Email will be sent for the following status changes:

- **Offered:** When an SD Worker offers a service request, the Service Provider will be notified via an email stating: “There is a new Service Request offer, please log into the portal to view”. A link to the record is included in the email.

- **Activated:** When an SD Worker activates a service request, the Service Provider will be notified via an email stating: “There is a new Service Request activation, please log into the portal to view”. A link to the record is included in the email.

- **Rescinded:** If an SD Worker rescinds a service request after it has been offered, the Service Provider will be notified via an email stating: “Please note, a service request you received (see order number below) is no longer available. This service request will **no longer** be visible in your ‘pending’ tab.”

- **Cancelled:** If an SD Worker cancels a service request after it has been offered, the Service Provider will be notified via an email stating: “Please note, a service request you received (see order number below) has been cancelled and is no longer available.”

  NOTE: Unlike rescinded service requests, cancelled service requests are still visible to the Service Provider via the **Cancelled** tab on the Service Request page.

- **Terminated:** If an SD Worker terminates a service request, the Service Provider will be notified via an email stating: “There is a new Service Request termination, please log into the portal to view.” A link to the terminated record is found in the email.

  NOTE: Unlike rescinded service requests, cancelled service requests are still visible to the Service Provider via the **Terminated** tab on the Service Request page.

Service Delivery Dashboard

The Service Delivery Dashboard provides insight into service requests and service reports. This dashboard consolidates data into various report types such as all/new/active/terminated/expiring service requests, mileage, service reports and more much more!

IMPORTANT: The Service Delivery Dashboard is currently in Beta, meaning that it is in full testing and feedback is greatly appreciated.

Service Delivery Reports

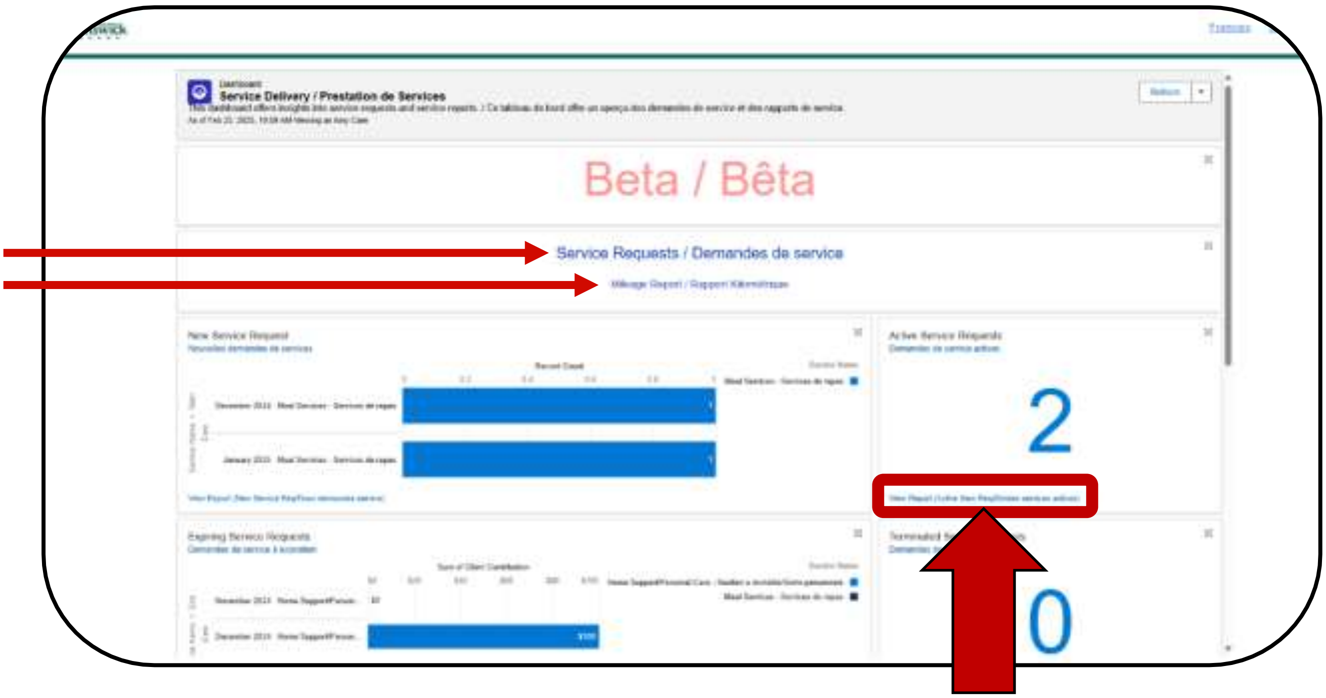
From this dashboard, the Service Provider can view:

- **Service Requests:** Report details of all service requests of basic cost type from last 120 days, grouped by status & Service Name with additional filters.
- **Mileage Report:** Report details all service requests of kilometer cost type from last 120 days, grouped by status & Service Name with additional filters.
- **New Service Requests**: Report details of all new service requests within the last 30 days.
- **Expiring Service Request:** Report details of all expiring service request within the next 30 days.
- **Active Service Requests:** Report details of all active service requests. A record count is displayed on the dashboard.
- **Terminated Service Requests:** Report details of all terminated service requests. A record count is displayed on the dashboard.
- **Service Confirmations:** Report details of all service confirmations from last 120 days, grouped by Apply to Month/Year and Service Name & State with additional filters.
- **Submitted Service Confirmations:** Report details of the Sum of Total confirmation Amount by Service Name, of **Submitted** service confirmations in the last 90 days.
- **Processed Service Confirmations:** Report details of the Sum of Total confirmation Amount by Service Name, of **Processed** service confirmations in last 90 days.
- **Total By Service:** Report details of the Sum of Total confirmation Amount by State, of Total by Service in Current and Previous year.
- **Failed Validation Service Confirmations:** Report details of the Sum of Total confirmation Amount by Service Name, of **Failed** Validation service confirmations in last 90 days.

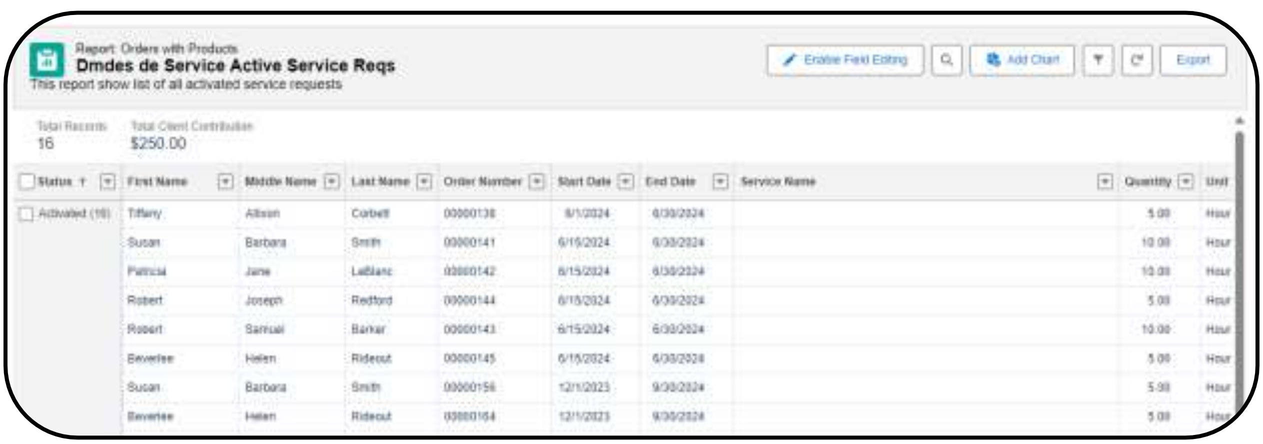
How to View Reports from Dashboard

From the Dashboard, the Care Coordinator is able to view individual details related to the displayed report types. By clicking on a **title or "view report" link** the Care Coordinator is able to view individualized and additional items that may not be displayed on the dashboard, as well export report details.

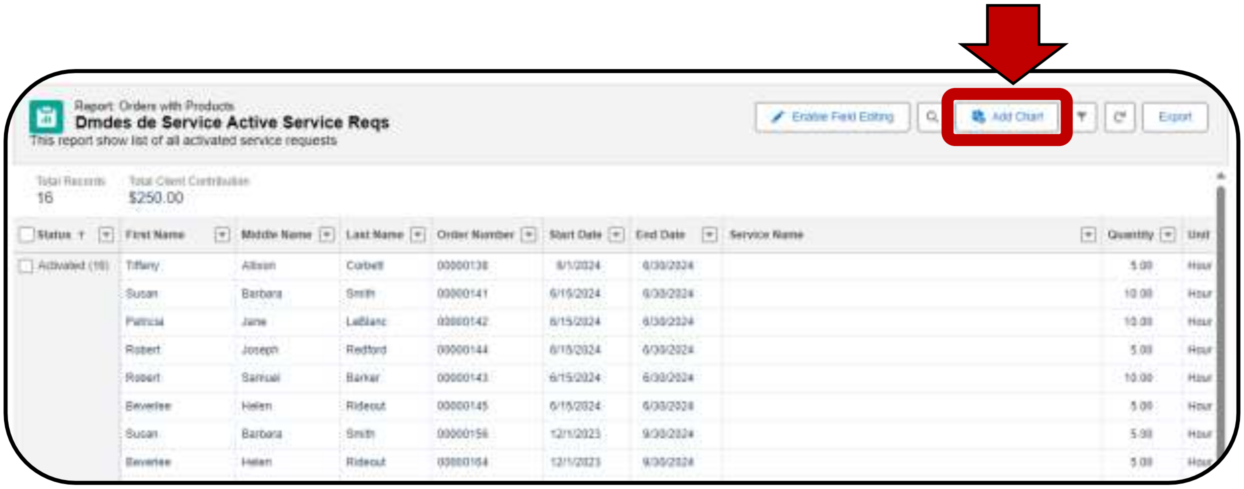
1. From the **Service Delivery Dashboard**, locate the applicable report type to view. The **View Report** hyperlink can be found at the bottom of any of the individual fields.



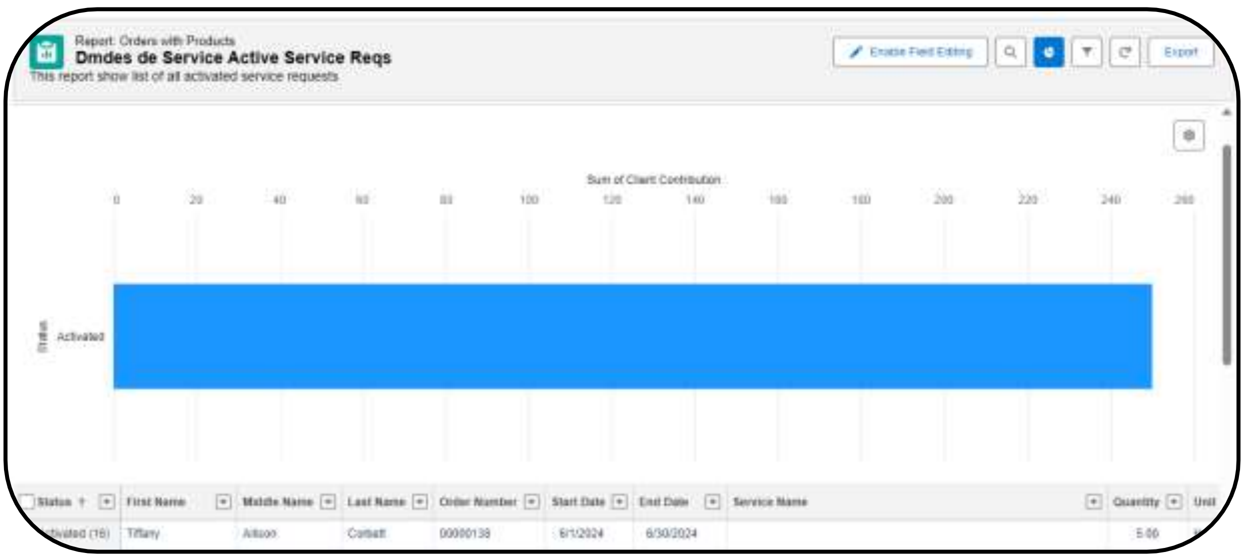
2. Once in the applicable **Report** window, a full list of related report items is displayed.



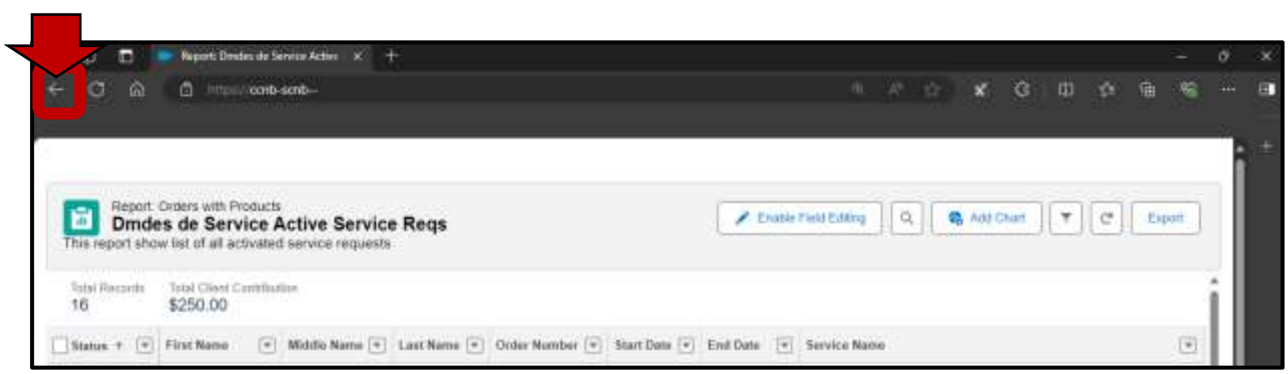
3. To add a chart to the report, click the **Add Chart** button.



4. A visual representation of the report data will appear as a bar chart.



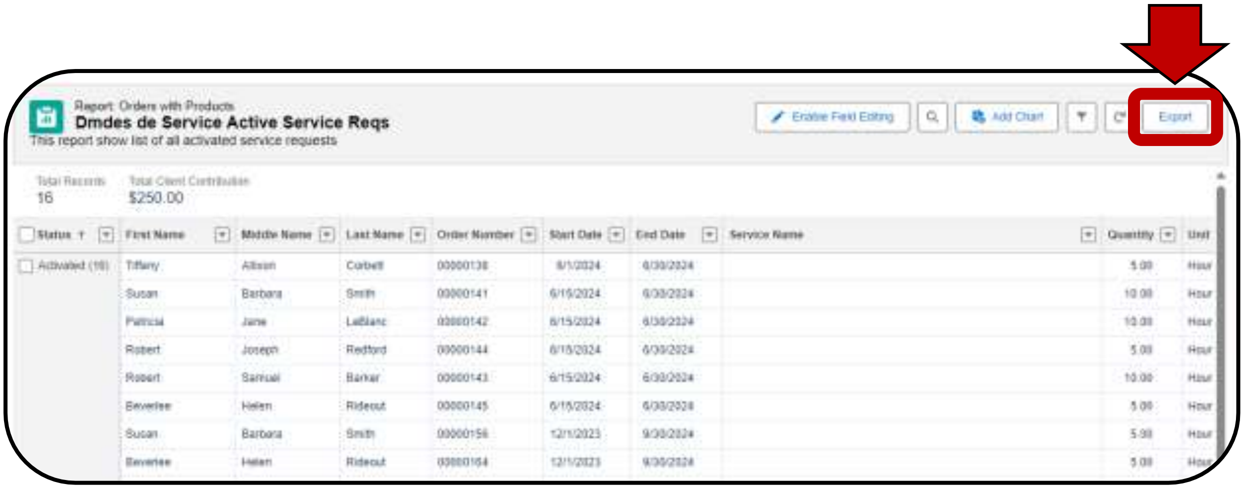
5. To return to the Service Delivery dashboard, click the **Go Back** arrow on the browser.



Export Reports

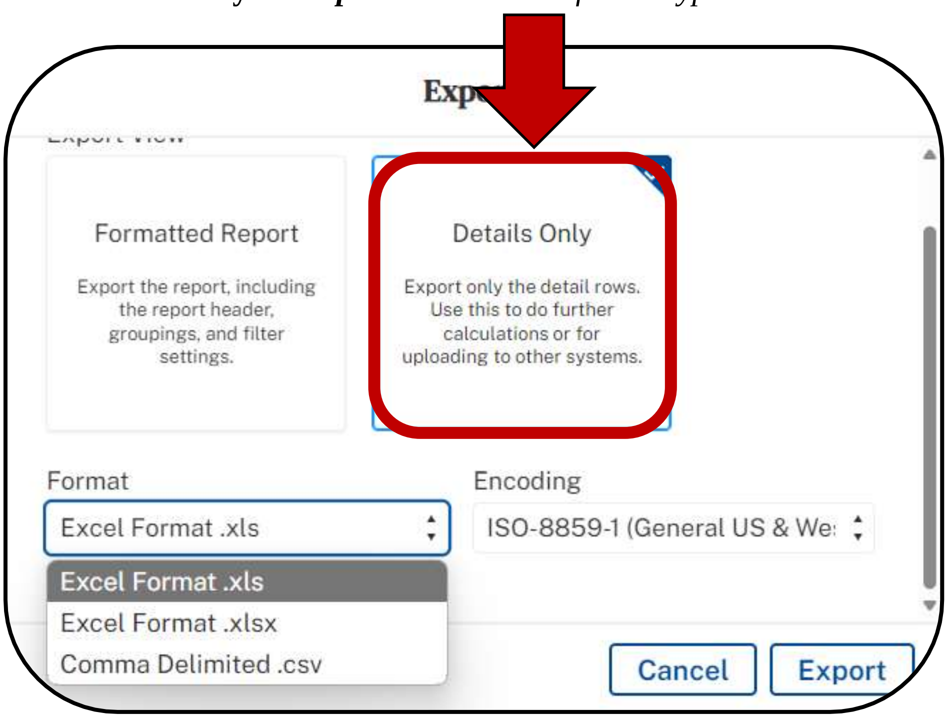
In any of the reports found on the Service Delivery Dashboard, the Care Coordinator has the ability to export when viewing all the details of a report type. It is recommended that the file be exported as an XLSX, XLS, or CSV file (see below).

1. From the report details window, select the **Export** button.



2. The **Export** popup window is displayed.

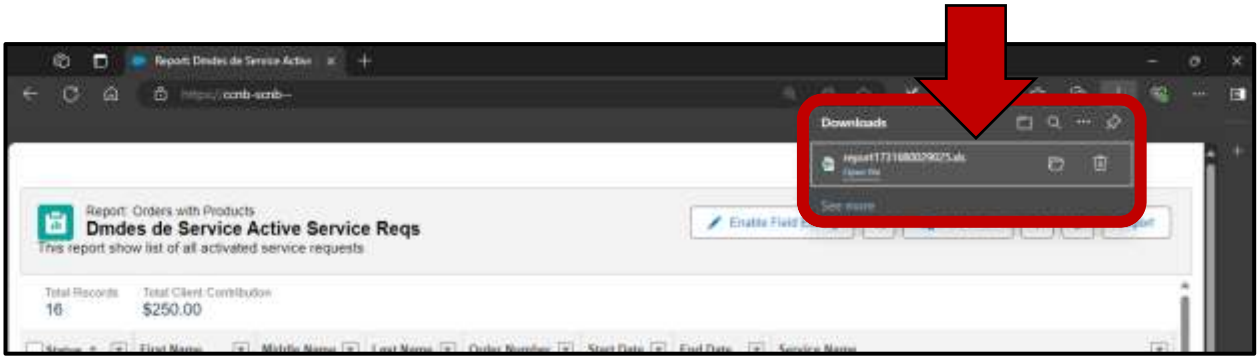
3. Select the **Details Only** tile. ***Optional:*** *select the format type.*



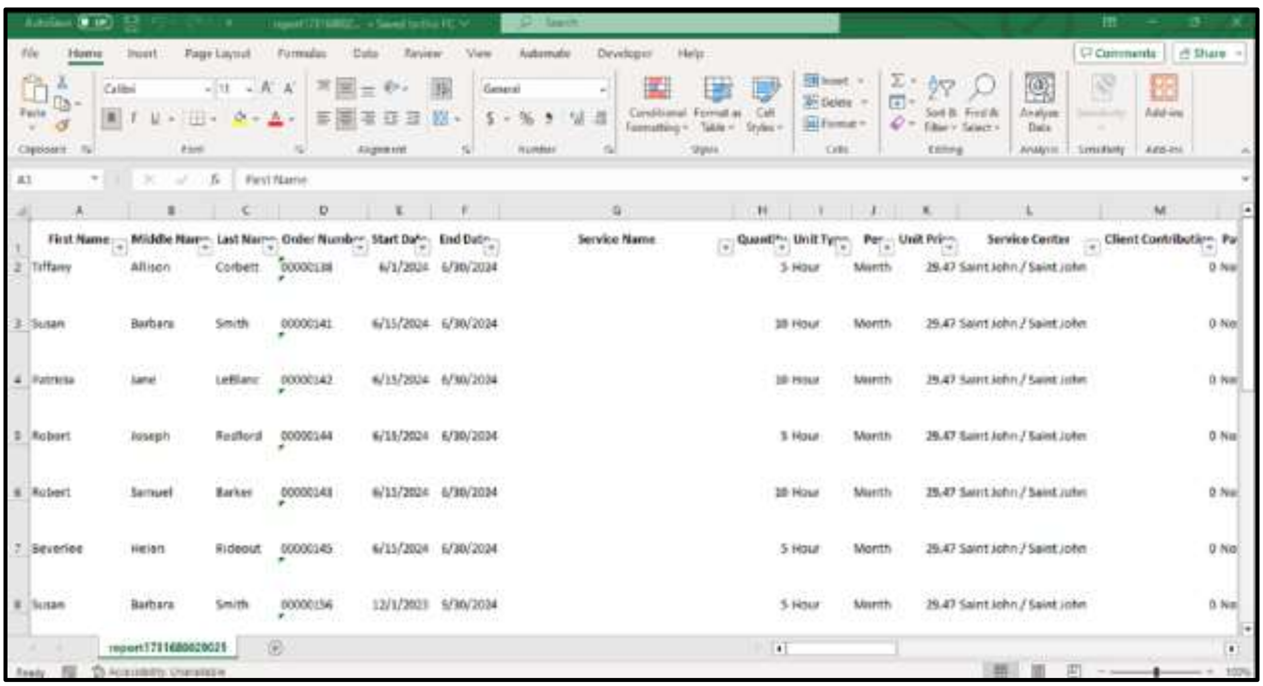
4. Once the **Details** and **Format** are select, click the **Export** button.

5. The page Reloads and the **Downloads** window is displayed with the exported report.

6. Click the report to open the Excel spreadsheet.



7. The Report is displayed and can now be printed or saved.



Refresh Data

If newly captured information is not displayed on the dashboard, or if the user wants to ensure that the most updated version is displayed, clicking the **Refresh** button reload and update all information displayed on the dashboard. This button must be used as the refresh button on the browser will not update the information.