Entering Training Timesheet:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Evvie Portal
3. Click "View All Shifts"
4. Click "Create a new Shift"
5. Select "EVV is not required" for ***both*** "exception" and "reason" code
6. Select the date and time for the start date
7. Select the date and time for the end date
8. Select the consumer you work with. Once you select the person's name, more boxes should appear with steps 9-15
9. Select the consumer enrollment (it may auto-select level 3, which is ok)
10. Select the "training" option for service code
11. Select any consumer response (one must be selected)
12. Select any goal (one must be selected if there is an option there)
13. Type in which trainings you did into the notes
14. Check off indirect
15. Select either "home" or "community" for start and end location (one must be selected)
16. Phone number/comments are not required
17. Check of check box declaring the info you entered is correct
18. Click "create shift"
    a. After clicking create shift:
        i. ***If you did it correctly*** it will bring you to a "displaying shift" page that should show the amount of hours you were trying to enter it for and it should show the correct date
            1. if is the wrong date or timeframe, go to "adjust shift" and then adjust the shift to be correct
            2. if it is all set, approve your shift by clicking "approve shift"
        ii. ***If you did it incorrectly*** it will remain on the same page. If it remains on the same page, refresh the page completely and try again

Entering PTO timesheet:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Evvie Portal
3. Click "View All Shifts"
4. Click "Create a new Shift"
5. Select "EVV is not required" for ***both*** "exception" and "reason" code
6. Select the date and time for the start date
7. Select the date and time for the end date
8. Select the consumer you work with. Once you select the person's name, more boxes should appear with steps 9-15
9. Select the consumer enrollment (it may auto-select level 3, which is ok)
10. Select a "PTO" option for service code
11. Select any consumer response (one must be selected)
12. Select any goal (one must be selected if there is an option there)
13. Type in "PTO request" into the notes
14. Do not select indirect
15. Select either "home" or "community" for start and end location (one must be selected)
16. Phone number/comments are not required
17. Check of check box declaring the info you entered is correct
18. Click "create shift"
    a. After clicking create shift:
        i. ***If you did it correctly*** it will bring you to a "displaying shift" page that should show the amount of hours you were trying to enter it for and it should show the correct date
            1. if is the wrong date or timeframe, go to "adjust shift" and then adjust the shift to be correct
            2. if it is all set, approve your shift by clicking "approve shift"
        ii. ***If you did it incorrectly*** it will remain on the same page. If it remains on the same page, refresh the page completely and try again

Entering normal shift that was not completed via Evvie App:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Evvie Portal
3. Click "View All Shifts"
4. Click "Create a new Shift"
5. Select an option for "exception" code that best describes why it wasn't completed through the Evvie App
6. Select an option for "reason" code that best describes why it wasn't completed through the Evvie App
7. Select the date and time for the start date
8. Select the date and time for the end date
9. Select the consumer you work with. Once you select the person's name, more boxes should appear with steps 9-15
10. Select the consumer enrollment (it may auto-select level 3, which is ok)
11. Select the correct option for service code
12. Select the consumer response that best describes how the participant did that day
13. Select applicable goals
14. Type in the notes for the day
15. Do not select indirect
16. Select either "home" or "community" for start and end location (one must be selected)
17. Phone number/comments are not required but can be entered in to explain why it was not entered in via the Evvie App
18. Check of check box declaring the info you entered is correct
19. Click "create shift"
    a. After clicking create shift:
        i. ***If you did it correctly*** it will bring you to a "displaying shift" page that should show the amount of hours you were trying to enter it for and it should show the correct date
            1. if is the wrong date or timeframe, go to "adjust shift" and then adjust the shift to be correct
            2. if it is all set, approve your shift by clicking "approve shift"
        ii. ***If you did it incorrectly*** it will remain on the same page. If it remains on the same page, refresh the page completely and try again

Entering a mileage entry for staff:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Wrenpay
3. Go to create
4. Click "New Mileage Entry"
5. Select the participant you worked with that day
6. Select the date of travel
7. Fill out how many miles you drove in total for that date
8. Select "IDGS-Transportation" for item code
9. Select applicable life plan outcome that the travel was for
10. For starting location, put in the full address of the very first location you picked the participant up at
11. For the ending location, put in the full address of the very last location you picked the participant up at
12. Under the purpose of travel section, list out all of the stops you are claiming mileage for in chronological order
    a. An example: "from home, to Greenwood Park, to Binghamton YMCA, to McDonalds in Apalachin, to home"
    b. For any chain location (such as the YMCA or McDonalds), specify whatever info is necessary to differentiate one location from another
13. No attachment is necessary
14. If you want to add in another shift's worth of mileage, you can click "add trip" and replicate steps 6-13 with a different date
15. Once all entries are added, click save
16. If done properly, you will be brought to a review page where you will review the reimbursement
    a. If it looks incorrect, you are able to edit the document right below the create button
    b. If it looks correct, you can click "Approve Request and Share Updates with Participant for their approval"
    c. If it is completely wrong, such as entering it under the wrong participant, you can click "Deny and cancel request"

Entering a Staff Activity Fee entry for staff:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Wrenpay
3. Go to create
4. Click "New General Reimbursement"
5. Select the participant you worked with on the date of the staff activity fee
6. Select the date of the purchase
7. Type in the total amount the purchase was for. If multiple items were purchased during one shift, one total amount for all purchases can be done
8. Under receipts, click "choose file" and upload an itemized copy of your receipt from the purchase. If multiple purchases were done, upload all itemized copies
    a. Itemized copies are required for reimbursement. This would show exactly what was purchased that made up the total amount being reimbursed for
9. Under item code, select "OTPS: Staff Activity Fees"
10. Under Life plan outcomes, select what goal was worked on during the activity that a purchase was done
11. Fill out the section describing what the purchase was for
12. Once all entries are added, click save
13. If done properly, you will be brought to a review page where you will review the reimbursement
    a. If it looks incorrect, you are able to edit the document right below the create button
    b. If it looks correct, you can click "Approve Request and Share Updates with Participant for their approval"
    c. If it is completely wrong, such as entering it under the wrong participant, you can click "Deny and cancel request"

Entering a reimbursement entry for Managing Employers/Participants:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Wrenpay
3. Go to create
4. Click "New General Reimbursement"
5. Select whether the participant should be paid to you or to the participant
6. Select the date of the purchase
7. Type in the total amount the purchase was for
8. Under receipts, click "choose file" and upload an itemized copy of your receipt from the purchase
    a. Itemized copies are required for reimbursement. This would show exactly what was purchased that made up the total amount being reimbursed for
9. Under item code, select the item code that matches what was being submitted for
10. Under Life plan outcomes, select what goal was worked on during the activity that a purchase was done
11. Fill out the section describing what the purchase was for
12. Once all entries are added, click save
13. If done properly, you will be brought to a review page where you will review the reimbursement
    a. If it looks incorrect, you are able to edit the document right below the create button
    b. If it looks correct, you can click "Approve Request and Share Updates with Participant for their approval"
    c. If it is completely wrong, such as entering it under the wrong participant, you can click "Deny and cancel request"

Reviewing Staff Reimbursements for Managing Employers/Participants:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Wrenpay
3. On the home page, the main display section is "Pending Reimbursement Requests"
4. For any pending reimbursements:
    a. If the status is "waiting for participant approval", this means that it is waiting for your approval and you would want to click "view" on that entry and proceed to step 5
    b. If the status is "new", that means the staff has yet to approve their own entry and they will need to approve it so you can approve it
5. After clicking view, you will be brought to a review page for the staff's reimbursement. On this page, look through the info and verify if everything looks all set
    a. If it looks all set, go ahead and select "approve and submit for reimbursement"
    b. If something looks amiss, towards the top there is a spot where you can click "edit" and you can edit the entry to look correct. If this occurs, the staff will need to re-approve the changes
    c. If it looks completely wrong, at the bottom there is an option to "deny and cancel request"
6. After addressing the previous reimbursement, you can click "home" at the top and start at step number 3

Reviewing Staff Timesheets for Managing Employers/Participants:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Evvie Portal
3. Click "View all shifts"
4. You can filter by any criteria seen in the "filter shifts" section if preferred
5. For approving shifts, you would want to approve any shift that has been entered in since the last time you accessed the system
6. Typically, this would be shifts in the status of "approved" or "submitted" but it could include some not so common ones such as "denied", "adjusted" or "challenged"
    a. If it is in the status of "approval locked", that timesheet is all set and does not need any further approvals
7. If you have not already approved a shift, you can click "view shift" and view all of the info on the shift submitted by the staff
8. Towards the bottom, depending on the info submitted on the shift, you would select one of these 3 options:
    a. Approve shift- if the shift looks all set, you can select approve shift which will take you to an approval page where you affirm that the info is correct and then you can click approve
    b. Adjust shift-if you see something wrong with the shift, you can see adjust shift, which allows you to edit the shift to change any portion of the shift to be accurate
    c. Deny shift- if a shift was not actually worked or it was under the wrong participant, you can deny the shift by selecting this option and affirming that the denial is correct
9. Once in the correct status, you can proceed back to step 3 in this guide

Reviewing Budgets for Managing Employers/Participants:

1. Log in here: https://springbrook-users.annkissamprojects.com/users/sign_in
2. Go to Participant Dashboard
3. In the secondary menu, click "budgets"
4. Find the budget you want to view (most recent ones displayed on top)
5. Once you find the correct budget, click "view budget line items"
6. You will then be able to see each service code, how much is in there to start, how much has been used, and how much is left