

A breakdown of core features for each End User of our Self-Direction platform

SUPPORT BROKERS

- ▶ Dashboard view of all Individuals assigned to a caseload by an organization.
- ▶ Budgets are created, validated, imported, or exported right from within the system.
- ▶ Electronically generate and view the status of amendments.
- ▶ Electronically generate and view the status of billing invoices.
- ▶ Document Broker meetings and agreements.
- ▶ Real-time view of the Year-to-Date Actual spending.
- ▶ View remaining hours in the Budget whenever service documentation is created in order to track balance.
- ▶ Single Sign On for multiple FI agencies to create an easier workflow for Brokers.

FISCAL INTERMEDIARIES

- ▶ View all Individuals with a snapshot of their PRA and Budget amounts.
- ▶ Process Broker billing and cut payments from an integrated Accounts Payable system.
- ▶ Process invoices and reimbursement requests to an integrated Accounts Payable system.
- ▶ Statuses of payments are shared with external Family and Broker portals for elevated transparency.
- ▶ Automated billing to an integrated Billing system allows for expedited processing and includes thorough billing rules for each applicable service type to ensure compliance.
- ▶ Payroll comparison view of Employee Time with Direct Billable Time and approval process.

MYEVEROPORTAL™ FOR INDIVIDUALS & FAMILY

- ▶ The Individual retains Budget Authority with an individualized dashboard in the MyeVeroPortal™.
- ▶ The Individual can choose their Circle of Support and grant access to their portal as they wish.
- ▶ Ability to upload invoice and reimbursement requests.
- ▶ Validation rules guide the correct selection for category to ensure an accurate dollar amount remaining.
- ▶ Receive automated monthly expenditure reports from the FI team within the portal.
- ▶ Ability to view and approve Self-Hired Staff Billable time and Broker Billable time.
- ▶ Real-time year-to-date Budget view is instantly accessible and provides full transparency.

SELF-HIRED STAFF

- ▶ Punch in/punch out in the same system where service documentation is collected.
- ▶ Service documentation is always based on the most current Habilitation Plan created by the Broker and approved by the Fiscal Intermediary team.
- ▶ View a visual representation of the time to the next billable unit to optimize utilization.
- ▶ Can operate with functionality online or offline, so time can always be accounted for.
- ▶ Report punch in/punch out issues in the app and communicate required changes to the supervisory team.
- ▶ Single Sign On passes directly through to the Payroll portal when available with your integrated Payroll system.