

Welcome to the FMS System Participant-Representative Tutorial. To begin you will need to enter your user name and password and click on the I agree button.

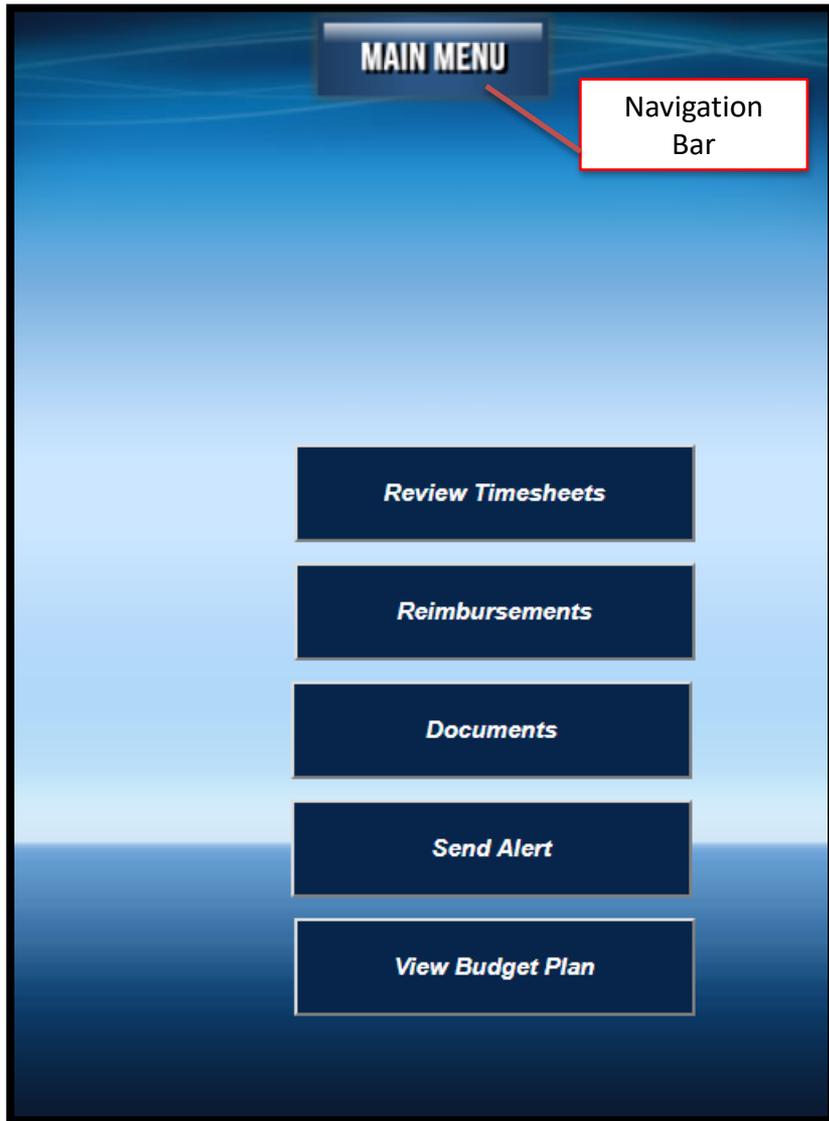
You have reached the Mains'l Financial Management System. This site is intended to provide an electronic interface for entering Mains'l FMS Timesheets and Invoices. All actions performed by the logged in user are deemed to be electronically signed by the user. If you agree to honor this policy please provide your digital signature -- enter your login name and password then click on the I agree.

UserName
Password

To reset your password please enter your user name and press Reset Password

If you are having technical difficulty please send an email to . You will receive a call or email back within 24
business hours
(Monday – Friday 8:30am-5:00pm).

Main Menu Page



The Main Menu button at the top of the page is a Navigation Bar

- ✓ “Review Timesheets” allows you to view, approve and unapprove all time entries
- ✓ “Reimbursements” allows you to enter and review reimbursed expenses
- ✓ “Documents” allows you quick access to user guides and commonly used forms
- ✓ “Send Alert” allows you to send a message to another user in the system
- ✓ “View Budget Plan” allows you to see the participants budget

How to Review Timesheets

1. Main Menu
2. Review Timesheets
3. Select the employee from the drop down menu
4. Select the date range from the drop down menu
5. Search

If a visit is completed in the EVV app the verified column will say **True**. If a visit is entered in the website or edited the column will say **False**.

To approve a timesheet click on the View button.
To unapprove a timesheet click on the Unapprove button

Timesheets to Review
Select Paid or Unpaid

All All hours

Employee: All All

Edited shifts or shifts that cross midnight may appear differently in the mobile app

Begin Date Time	End Date Time	Service Code	Last Name	First Name	Description	Hours	Rate	Paid	Approved	Paid Date	Booker Approved	EVV	VisitID	TimesheetID	Units		
11/18/2021 9:49:29 AM		PA	IVRTest	Donotpay	SCL2 - Personal Assistance	0.00	15.00	No	No		No	True	355340	4933879		<input type="button" value="View"/>	<input type="button" value="UnApprov"/>
11/18/2021 12:28:38 AM	11/18/2021 12:29:26 AM	PA	Ever	DontPay	SCL2 - Personal Assistance	0.00	30.00	Yes	No		No	True	354991	4933377	0	<input type="button" value="View"/>	<input type="button" value="UnApprov"/>
11/17/2021 10:32:19 AM		PA	Ever	DoNotPay	SCL2 - Personal Assistance	0.00	15.00	Yes	No		No	True	354079	4932183		<input type="button" value="View"/>	<input type="button" value="UnApprov"/>
11/11/2021 1:43:19 PM	11/11/2021 1:55:55 PM	PA	IVRTest	Donotpay	SCL2 - Personal Assistance	0.25	15.00	Yes	No		No	True	347083	4921736	1	<input type="button" value="View"/>	<input type="button" value="UnApprov"/>

Approved time entries status will say Yes, Not Approved time entries will say No

Review of a Verified Visit Timesheets

The timesheet will contain a view of the GPS coordinates including latitude and longitude

*After the Representative reviews the timesheet they will click the Approve Button to approve the timesheet

Add Timesheet - Approved
Content Pay period: Hours worked for period: 0.00

Start Shift
12/11/2020 Hour: 05 Min: 47 AM PM

End Shift
12/11/2020 Hour: 05 Min: 48 AM PM

Reason Code
Not Selected

Client
Test-1 Client

Service Code
ac

Begin Location
End Location

Visit Location:
Start: 44.9905104,-03.2004982
End: 44.9905502,-03.2005028

Select one or many service activities that apply

Maintaining a safe environment Sleeping
 Breathing Ability to use telephone
 Eating and drinking Responsibility for own medications
 Elimination Other

Were there health, safety, welfare issues/ concerns during the shift
No Concerns

Approve Cancel

Review of a Non-Verified Visit Timesheets

*If a Non Verified Visit is being approved by the Representative they will see the reason code the employee selected on the timesheet when the edit took place

*After the Representative reviews the timesheet they will click the Approve Button to approve the timesheet

Add Timesheet
Current Pay period: Hours worked for period 0.00

Start Shift
12/11/2020 Hour: 05 Min: 47 AM PM

End Shift
12/11/2020 Hour: 05 Min: 49 AM PM

Reason Code
900

Client
Test-1, Client AC

Begin Location
Larperfield Avenue West

End Location
Larperfield Avenue West

Visit Location:
Start: 44 9905104-63 2004602
End: 44 990402-63 2004026

Select one or many service activities that apply

<input checked="" type="checkbox"/> Maintaining a safe environment	<input type="checkbox"/> Sleeping
<input checked="" type="checkbox"/> Breathing	<input type="checkbox"/> Ability to use telephone
<input type="checkbox"/> Eating and drinking	<input type="checkbox"/> Responsibility for own medications
<input type="checkbox"/> Elimination	<input checked="" type="checkbox"/> Other

Were there health, safety, welfare issues/ concerns during the shift
No concerns

Approve Cancel

List of Reason Codes

Code	Description
105	Services Provided outside the home. When the GPS collected does not match the expected location, code 105 should be passed.
300	Phone Lines not working - Attendant or assigned staff not able to call in. When telephony (IVR) is the designated method for EVV for a recipient, but the phone lines are not working at check in and / or out, code 300 should be passed.
405	Phone unavailable - Verified services were provided. When IVR is the method of EVV but the phone is unavailable, code 405 should be passed.
410	Individual / Member refused attendant or assigned staff use of phone - verified services were delivered. When IVR is the method of EVV but the member refused to allow the assigned staff to use the phone, code 410 should be passed.
310	Malfunctioning Mobile Application When an assigned staff is unable to check in and /or out because the mobile device malfunctions, code 310 should be passed.
900	Attendant or Assigned Staff failed to call in or called in early/late– verified services were delivered If the assigned staff fails to check in with EVV or checks in late, but checks out with EVV, and the services were delivered, code 900 should be passed. (This is rare as most EVV systems do not allow an assigned staff to check out without first checking in). The reason code is necessary as the invoiced start time will be different than the actual start time or there is no actual start time collected by the EVVsystem.
905	Attendant or Assigned Staff failed to call out early/late –verified services were delivered If the assigned staff fails to check out or checks out early or late, but the services were delivered, code 905 should be passed. The reason code is necessary as the invoiced end time will be different than the actual end time or there is no actual end time collected by theEVV device.
910	Attendant or assigned staff failed to call in and out – or both the in and out times were late/early --verified services were delivered if the assigned staff fails to call both in and out or both the actual start and actual end will be different from the invoiced start and invoiced end, but the services were delivered, code 910 should be passed
915	Wrong phone number – verified services were delivered if IVR is the EVV method but the number collected is the wrong number, code 915 should be passed

How to Enter Reimbursements

1. Main Menu
2. Reimbursements
3. Add Reimbursement

The screenshot shows a software interface for adding a reimbursement. At the top, there is a 'MAIN MENU' button. Below it, the 'Add Reimbursement' form is displayed. The form includes a 'Service Code' dropdown menu, an 'Amount' input field, and an 'Expense Date' calendar. Three callout boxes provide instructions: one pointing to the Service Code dropdown, one pointing to the Amount input field, and one pointing to the date '2' in the calendar.

MAIN MENU

Add Reimbursement

Service Code
APSupplement-APSupplement-AP Nutritional Supplement ▾

Amount

Expense Date

Enter Amount of Reimbursement

Select the service code from the dropdown menu options

Select the date for the expense

December 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Save Cancel

How to Review Reimbursements

1. Main Menu
2. Reimbursements
3. Select Date Range
4. Search

MAIN MENU

ClientID: 1000 - Client Name: Participant Test

Reimbursements
Select Paid or Unpaid: All

Date Range: All

Search **Add Reimbursement**

Description	Service Code	Begin Date	End Date Time	Amount	Approved	Paid		
AP-Pads	AP-P	11/30/2021	11/30/2021	98.49	No	No	Edit	Delete
AP-Wipes	AP-W	11/29/2021	11/29/2021	52.00	No	No	Edit	Delete
AP-Gloves	AP-G	11/28/2021	11/28/2021	85.75	No	No	Edit	Delete

Logout **Change Password**

How to Edit a Reimbursements

1. Main Menu
2. Reimbursements
3. Click Edit on the Reimbursement Line to Edit

The screenshot shows the 'Edit Reimbursement' form with the following fields and annotations:

- Service Code:** A dropdown menu currently showing 'AP-Gloves'. A red box with the text 'Change / Update Service Code for Expense' has an arrow pointing to the dropdown arrow.
- Amount:** A text input field containing '352.00'. A red box with the text 'Change / Update Amount of Expense' has an arrow pointing to the input field.
- Expense Date:** A calendar widget for December 2021. The date '8' is selected and highlighted with a red box. A red box with the text 'Change / Update Date of Expense' has an arrow pointing to the selected date.
- Buttons:** 'Save' and 'Cancel' buttons are located at the bottom. A red box with the text 'Click Save' has an arrow pointing to the 'Save' button.

December 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

How to View Documents

1. Main Menu
2. Documents
3. Select the type of documents you wish to view from the specific buttons



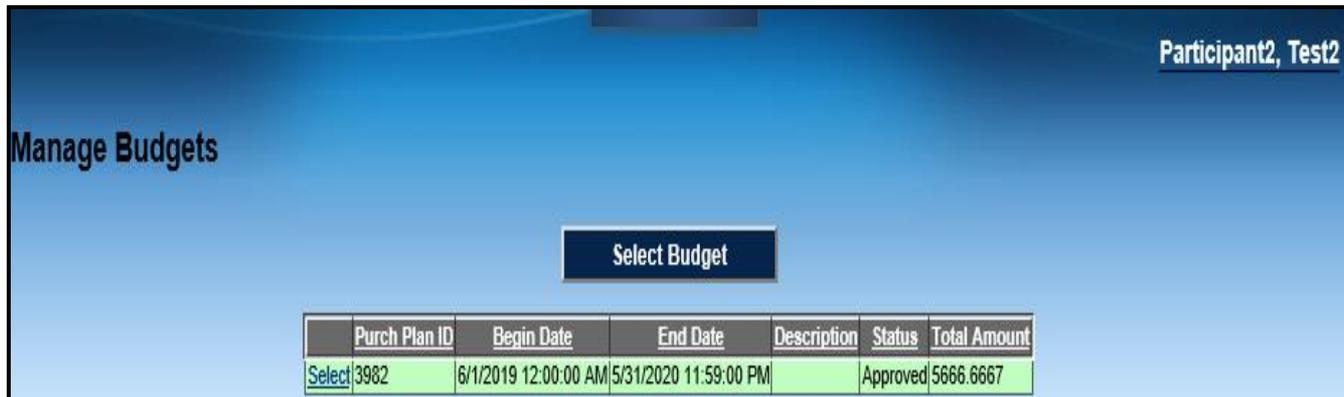
How to Send Alerts

1. Main Menu
2. Send Alerts
3. Select the user from the drop down menu
4. Select the Program from the drop down menu
5. Type the Message in the text box
6. Send

The screenshot shows a software window titled "Add Alert". At the top, there are two dropdown menus. The "User" dropdown is set to "Test, Representative, Representative" and the "Program" dropdown is set to "Not Selected". Below these is a large, empty text box for entering a message. An orange callout bubble points to this text box with the text: "Type the message you would like to send to another user in the text box". At the bottom of the window, there are two buttons: "Send" and "Cancel".

How to View a Budget Plan

1. Main Menu
2. Select Client
3. View Budget Plan
4. Click on Budget Plan
5. Click on the Select button next to the budget you want to review (the line will turn green)
6. Click on Select Budget



The screenshot shows a web interface for managing budgets. The title 'Manage Budgets' is on the left, and 'Participant2, Test2' is in the top right corner. A 'Select Budget' button is centered above a table. The table has columns for 'Purch Plan ID', 'Begin Date', 'End Date', 'Description', 'Status', and 'Total Amount'. The first row is highlighted in green, indicating it is selected.

	Purch Plan ID	Begin Date	End Date	Description	Status	Total Amount
Select	3982	6/1/2019 12:00:00 AM	5/31/2020 11:59:00 PM		Approved	5666.6667

View Budget Plan

Jones, John

Manage Budget

Budget Period: 3/1/2019 through 2/29/2020 Status: Approved

HOURLY WORKERS
VENDORS
REIMBURSEMENTS

Respite Limits

	Service Code	Begin Date	End Date	Total Dollars	Spent Dollars	Status
Select	ac-Attendant Care	03/01/2019	02-29-2020 11:59 PM	20823.13		Approved
Select	cls-Community Living Supports	03/01/2019	02-29-2020 11:59 PM	20823.13		Approved
Select	h-Homemaker	03/01/2019	02-29-2020 11:59 PM	2000.00		Approved
Select	r-Respite	03/01/2019	02-29-2020 11:59 PM	6286.57		Approved

Remaining units for the period

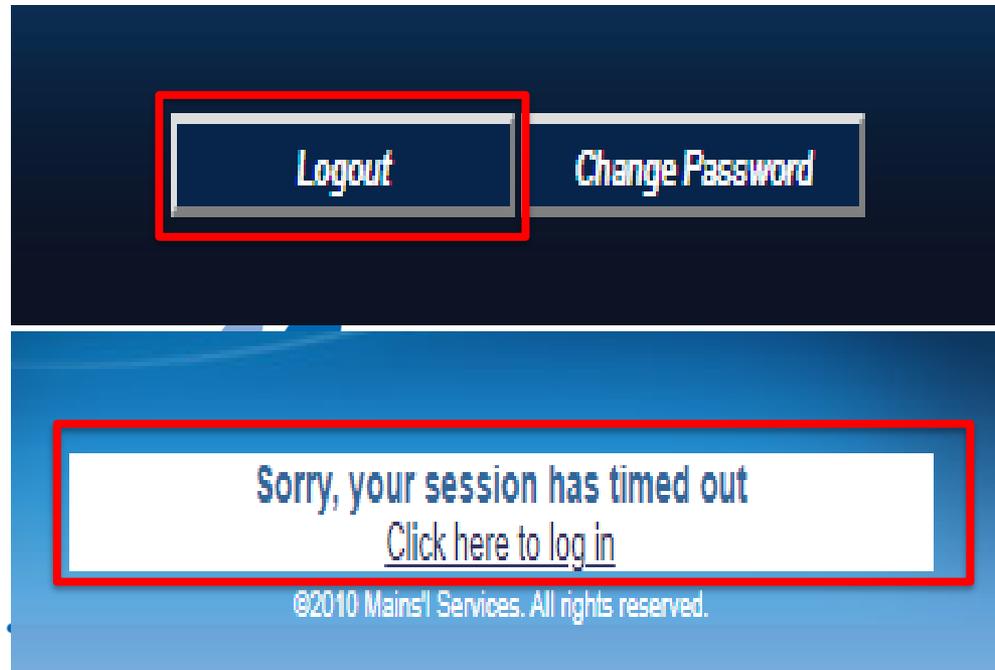
	Service Code	Period Begin Date	Period End Date	Type	Total units for the period	Spent units for the period	Remaining units for the period
Select	ac	06/02/2019	06-08-2019 11:59 PM	Week	500.00	34	466
Select	ac	06/09/2019	06-15-2019 11:59 PM	Week	500.00	4	496

Employee Rates

	Worker ID	Worker Name	Service Code	Rate	Begin Date	End Date	Description	Status
Select	1000	Employee1, Test1	ac	11.50	03/01/2019	02-29-2020 11:59 PM	ac-Attendant Care	Approved
Select	1000	Employee1, Test1	cls	12.00	03/01/2019	02-29-2020 11:59 PM	cls-Community Living Supports	Approved
Select	1000	Employee1, Test1	r	14.50	03/01/2019	02-29-2020 11:59 PM	r-Respite	Approved

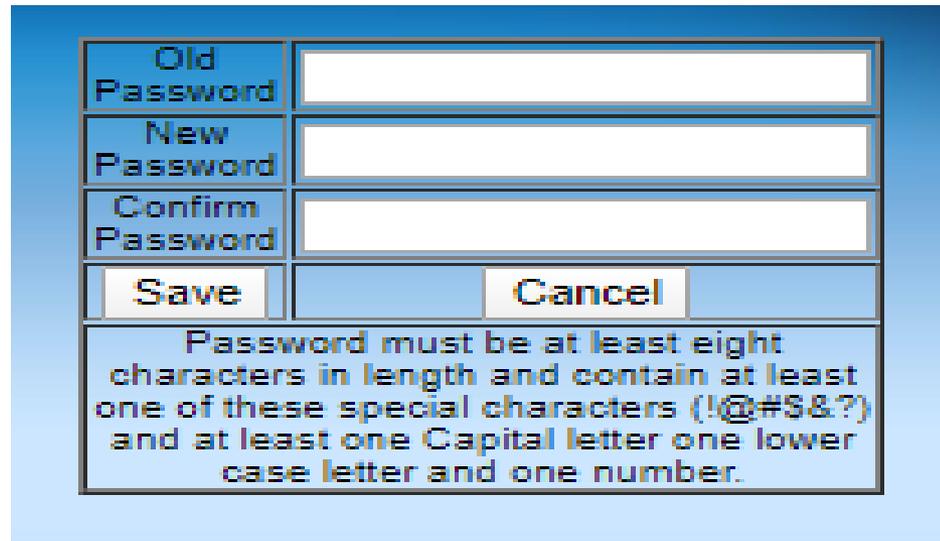
This will show what is available in the budget and what has been spent

How to Log Out



To properly log out the user can click the Logout Button located on the bottom of every screen the user has access to. If there is inactivity, the system has an automatic log out feature built in that will logout the user after 15 minutes of inactivity.

How to Change Password



Old Password	<input type="text"/>
New Password	<input type="text"/>
Confirm Password	<input type="text"/>
Save	Cancel
Password must be at least eight characters in length and contain at least one of these special characters (!@#\$%&?) and at least one Capital letter one lower case letter and one number.	

1. The user can click the Change Password Button
2. The user enter the Old Password
3. The user can enter the New Password
(Password parameters will be located at the bottom of the screen)
4. The user can confirm the New Password
5. When finished the user can click the Save Button



This will conclude the Participant-Representative Tutorial
Thank you!