

Self-Direction Data Entry Procedure Manual

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Version #1.1

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Document Version: 1.0 (November 2016).

1. Revision History:

(The revision history is used to track changes and updates made to procedures and when they occurred. This must be completed every time an update or revision to the document is made)

Version	Date of Change	Description of Change	Author	Reviewed and Approved by and Date
1.0	8/25/17	Convert to Conduent template	D. Rickerd	
1.1	9/3/18	Data Entry will identify obvious errors to RTP	D. Rickerd	

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3. Introduction:

Performs the activities involved with processing Self-Direction waiver program Data Entry documentation (Timesheets, Mileage, Payment Request Forms) for Mi Via and Centennial Care vendors and employees.

Service Level Agreements (SLAs):

All documents received in good order by midnight Saturday each week must be processed by noon Wednesday of the following week to meet payroll according to the payroll schedule.

Payment Request Forms (PRFs) are processed every week.

Timesheets and Mileage are processed every other week according to the payroll schedule.

4. Staffing:

Job Description: Data Entry Specialist

- Data entry of material from source documents to a computer database.
- Transcribes routine pre-coded and identifiable alphanumeric data from source document and/or phone call into an automated system.
- Ensures accuracy and completeness of data.
- Performs clerical tasks in the data entry function.
- Receives and distributes incoming mail and materials.
- All other duties as assigned.
- Must have excellent oral and written communication skills and demonstrated analytical skills

5. Departmental Duties:

- Data entry of material from source documents to a computer database.
- Transcribes routine pre-coded and identifiable alphanumeric data from source document and/or phone call into an automated system.
- Receives and distributes incoming mail and materials.

Quality Assurance:

10% of Timesheets, Mileage, and Payment Request Forms (PRF) are reviewed by QA for Accuracy.

6. Tools:

FOCoSonline

<https://nm.focosonline.com/nm/>

Click “Launch FOCoSonline” button:



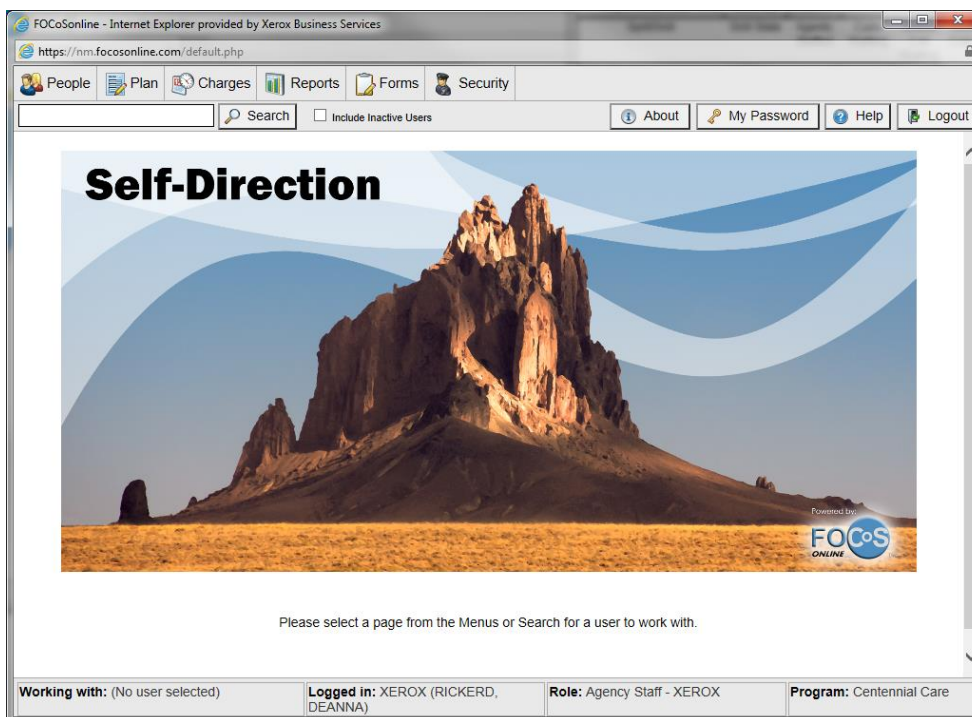
Enter your Login Name and Password:

A screenshot of the FOCoSonline login page, viewed in Internet Explorer. The browser's address bar shows 'https://nm.focosonline.com/login.php?state_path=/nm/&first_login=yes'. The page has a blue and white wavy header. The 'FOCoS ONLINE' logo is centered. Below the logo are two input fields: 'Login Name:' and 'Password:'. A 'Log In' button is positioned below the password field. A welcome message reads: 'Welcome to the Xerox Solution and the FOCoSonline System.' At the bottom, a disclaimer states: 'Welcome to FOCoSonline. By accessing and using FOCoSonline, you acknowledge that you will have access to certain private information that is protected by certain privacy laws including the Health Insurance Portability and Accountability Act (HIPAA) Security and Privacy Rules, and by other State and federal laws and regulations. Protected information is intended for receipt by and disclosure to only authorized recipients. You represent that you are an authorized recipient and agree to take all reasonable measures to protect all information contained in or generated by FOCoSonline. You understand that unauthorized use or disclosure of protected information is a violation of both the terms of use of FOCoSonline and applicable laws. Additionally, you acknowledge that FOCoSonline is the intellectual property owned by FOCoS (a Xerox Company)'.

Click on the role/program you wish to enter:



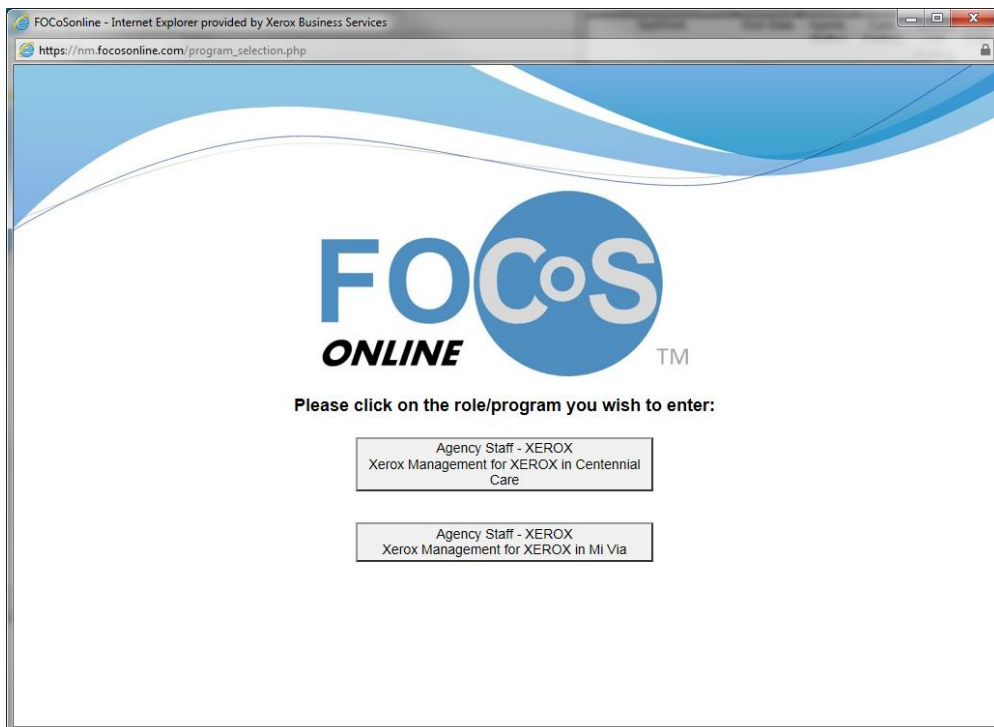
Centennial Care:



Click the “Security” button, then “Switch Program/Role” to switch to Mi Via:



Click the “Mi Via” Button:



Mi Via:



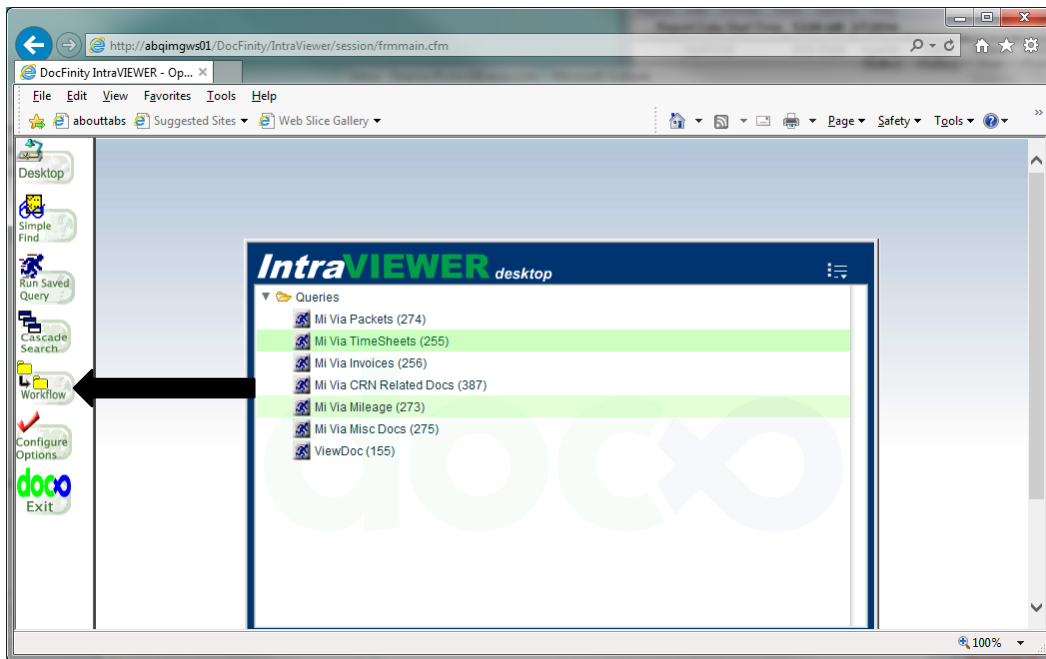
DocFinity Intraviewer

<http://abqimgws01/DocFinity/IntraViewer/session/frmmain.cfm>

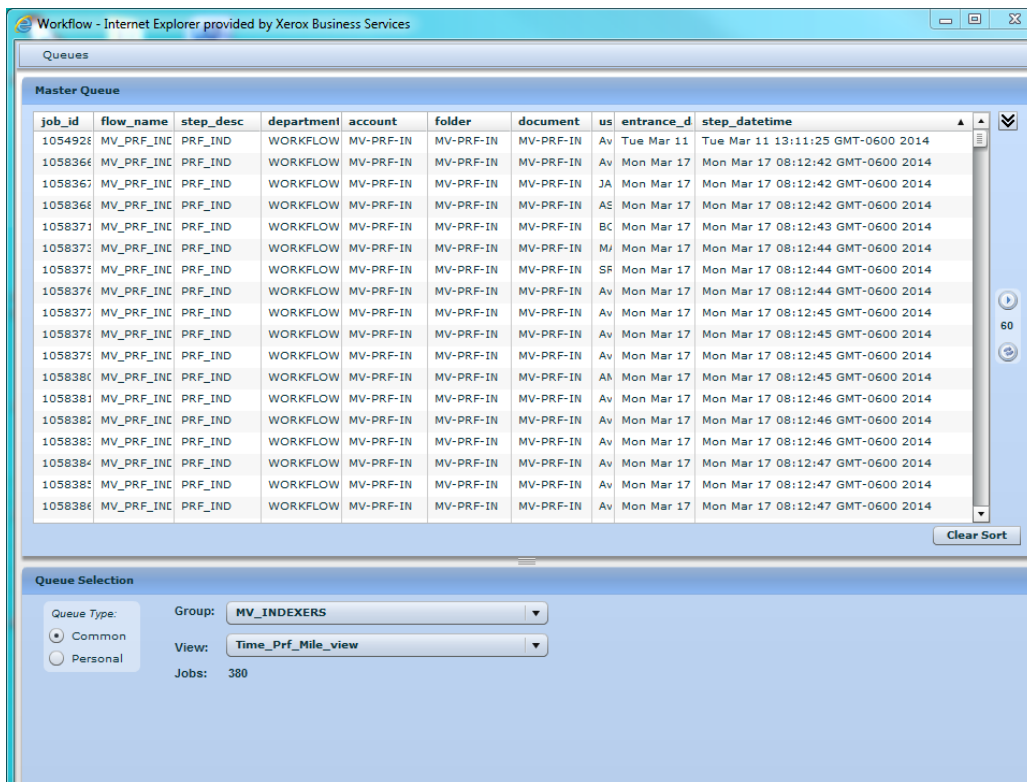
Enter your User ID and password:



Click the “Workflow” button on the left:



Workflow:



http://nmcrmweb:5555/XeroxGHSCRM/main.aspx



7. Procedures:

Receiving & Logging the Mail

The Mailroom prepping, sorting and scanning processes hold the key to getting the various types of documents for the Self-Direction program into the FOCoS^{online} system. These procedures are critical. If the documents are not sorted correctly, rejected documents, which require special handling and re-processing, are the end result.

Mail is delivered to and picked up twice daily from the Mi Via/Self-Direction Department, once at 8:00 am and again at 2:45 pm. On Mondays and Tuesdays the Mailroom has been instructed to deliver any Mi Via/Self-Direction mail they receive throughout the day, not just at 8:00 and 2:45.

Document Type	Identifier/Description	Handling
Timesheet	Single Timesheet without attachments	<ul style="list-style-type: none">Separate Timesheets into a bin for single documents
Payment Request Form (PRF)	Form requesting payment with invoice attachment	<ul style="list-style-type: none">Look at the Name(s) on the documents to determine which correspondence is associated with which PRFProcess each Inbound Correspondence with each PRF with the same Name as a Multi.Insert patch sheet between each Multi PRF.
Invoices	Receipts, Mileage Invoice,	<ul style="list-style-type: none">Invoices should be attached to PRFs.
Inbound Correspondence	General letter regarding any subject	<ul style="list-style-type: none">Separate Inbound Correspondence into a bin for single documents

Facsimile Documents

Faxed documents are systematically converted into an image. There is no paper handling by the Data Entry staff via the fax server.

The individual faxes are sorted using the Fax Form ID software. From here they are placed into the normal workflow merging at the Batch Build process.

Splitting Documents

Description/Purpose

Mi Via/Self-Direction receives most of the documents through Right Fax. Documents are split using Abledoc splitter and placing them into Workflow.

Software Access Required

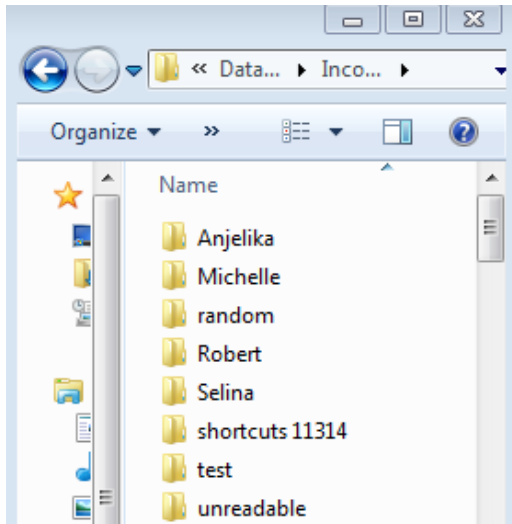
- Abledoc splitter, I: drive
- Microsoft Office Document Imaging

Steps

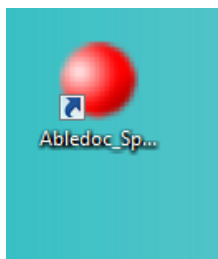
Go to start button then go to the I drive Org _unit path below

\\abq01\org_unit\Mi_Via\Data_Processing\Incoming_Documents

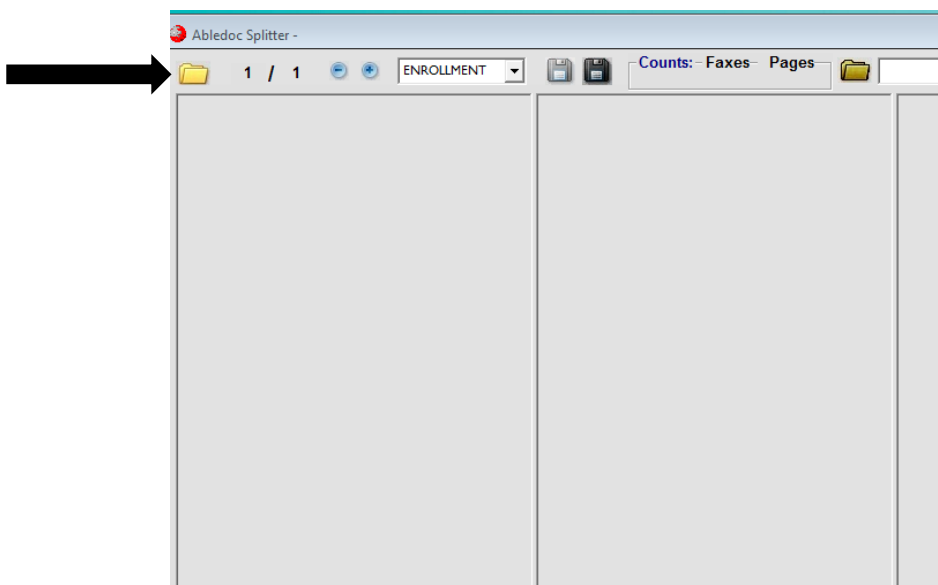
Cut the incoming files and place into the working folder with your name on it



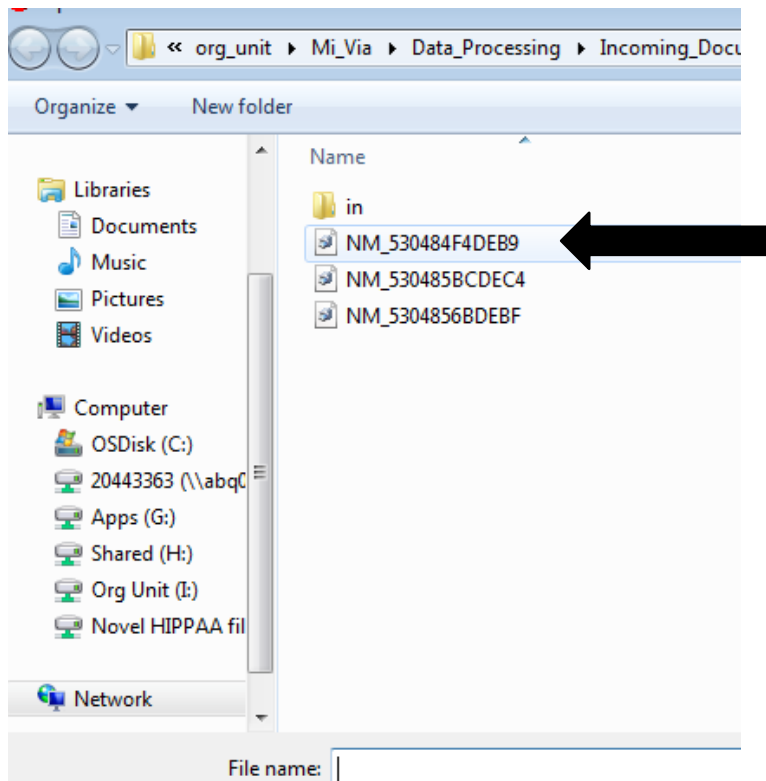
Next open Abledoc_splitter



Click on the yellow folder



A screen will pop up select the first document in the list



Review the document(s):

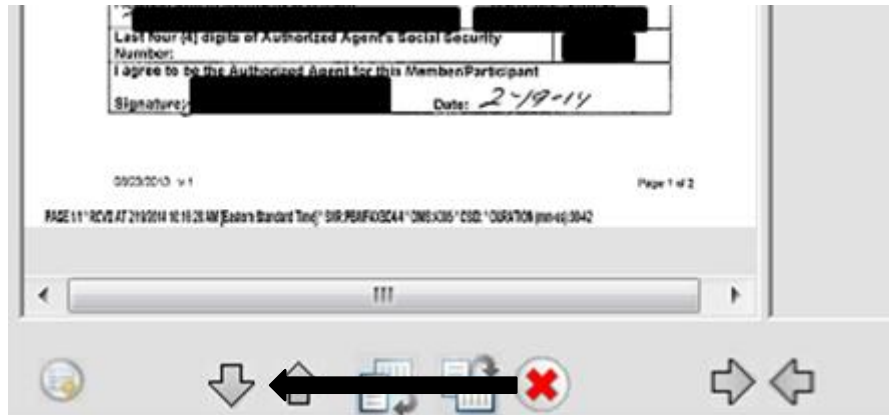
Determine what file your document(s) will need to go to

- There are six options on the drop down:
 - ENROLLMENT, PRF, TIME, UNKNOWN AND UNKNOWN_RANDOM
 - Any documents related to Enrollment go in the ENROLLMENT folder
 - Payment Request Forms (PRF) go in the PRF folder, the PRF will have an invoice attached
 - Timesheets go in the TIME folder and are usually only one document (sometimes may have a PRF with it and a fax cover sheet, don't split)

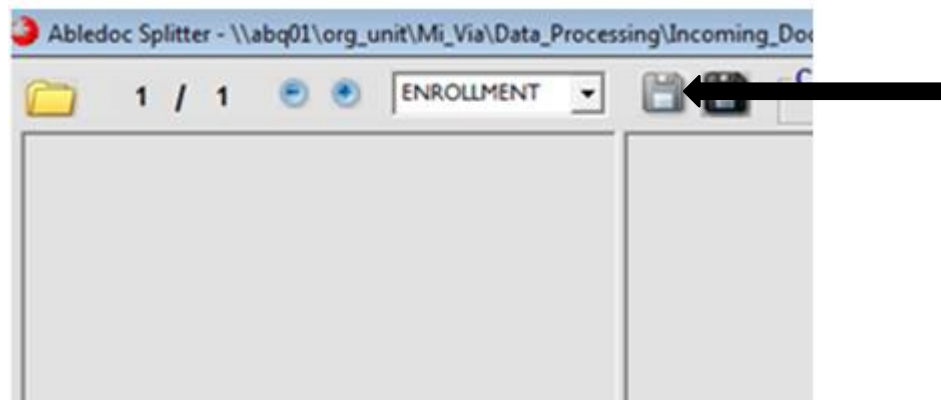
- 1) Select the black dropdown arrow to select for the file destination – example: Enrollment



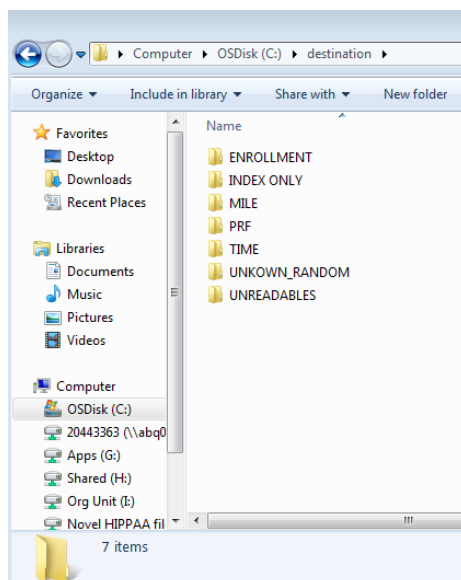
- 2) Select the gray down arrow at the bottom of the page



- 3) Select the gray save button at the top of the page



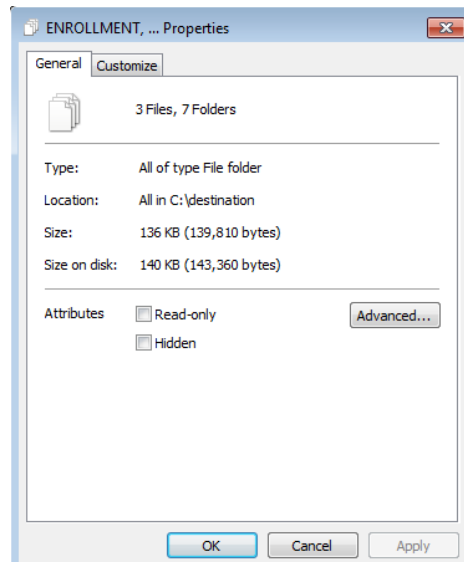
Once you are done splitting files, locate the different files in your destination folders located in the C: drive
C:\destination



Check the files you split to ensure they are in the correct corresponding folders
Example: Timesheets in the TIME folder

Email your supervisor with a screenshot showing the amount of documents you split

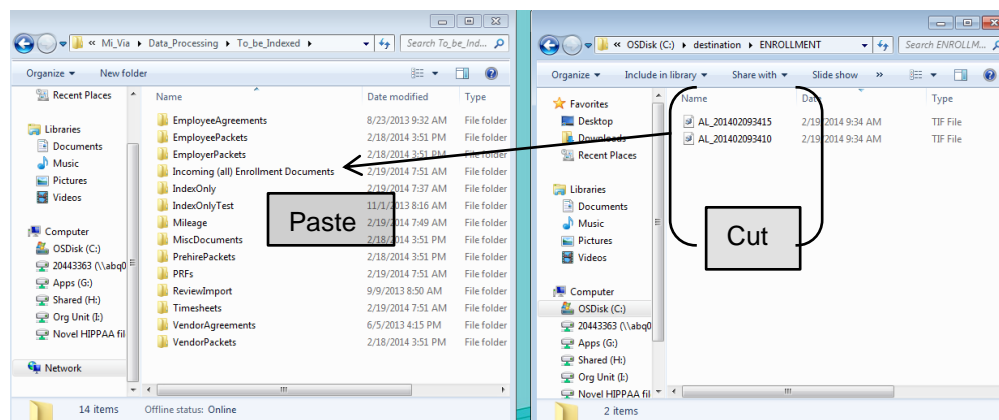
Highlight your files, right click and select "Properties"



Once you have reviewed all your folders, send the email to your supervisor of the documents you cut and pasted to the Workflow folders located in the org_unit I: drive path below:

\\abq01\org_unit\Mi_Via\Data_Processing\To_be_Indexed

- 4) You will need two modules open, one to place in workflow folder and the other with the destination folders
- 5) Cut the documents and paste in the corresponding files



Indexing

Description/Purpose

Indexing timesheet, mileage and PRF

Software Access Required

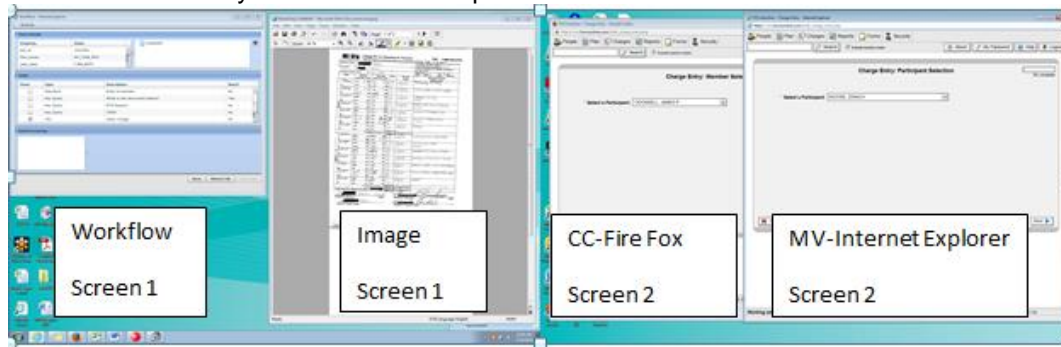
- Intraviewer (<http://intraviewer/>) Workflow queue
- FOCos**online** (<https://nm.focosonline.com/nm/>)
- Spreadsheet list (I:\Mi_Via\Data_Processing\2_To_be_Keyed) xxxx-xx-xx (date) Employee and Vendor spreadsheet

Set up

You may set up your 2 monitors as shown in the example below

Screen 1: Your left screen will have the workflow queue and beside it will be your Microsoft Office imaging

Screen 2: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

Intraviewer

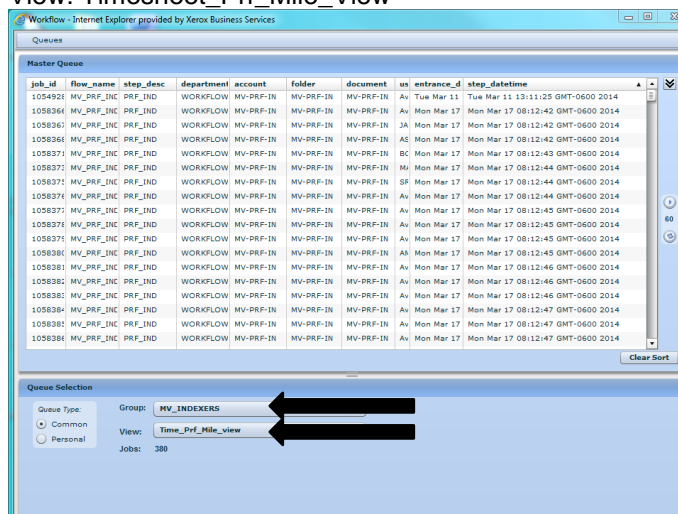
- 1) Select the yellow workflow folder



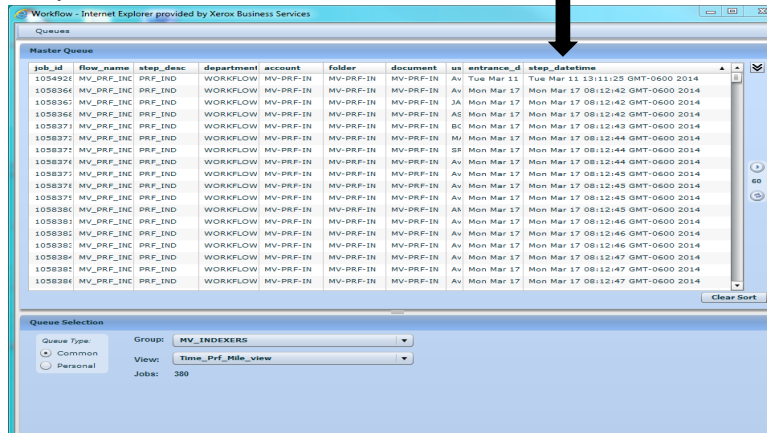
Your workflow queue should pop up

Set your queue

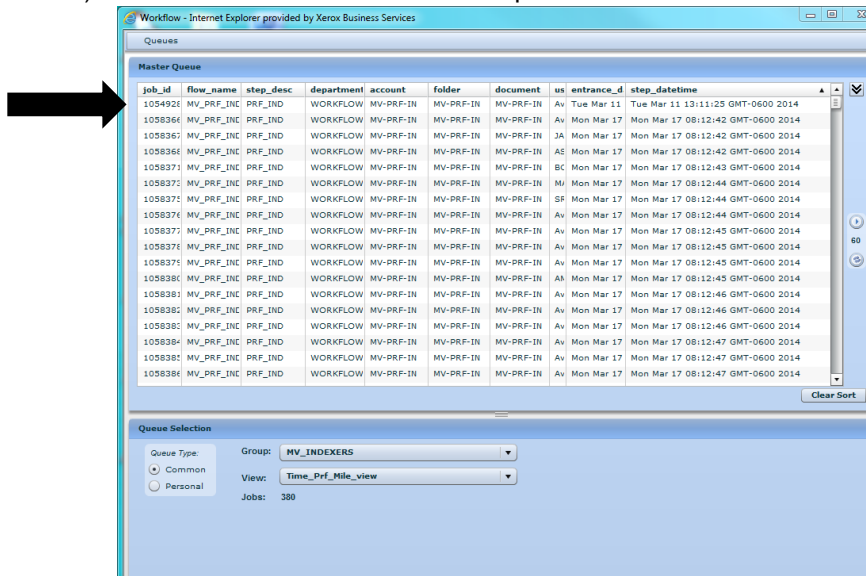
- 2) Group: MV_INDEXERS
- 3) View: Timesheet_Prfl_Mile_View



- 4) Set your “RecDT” to the oldest date



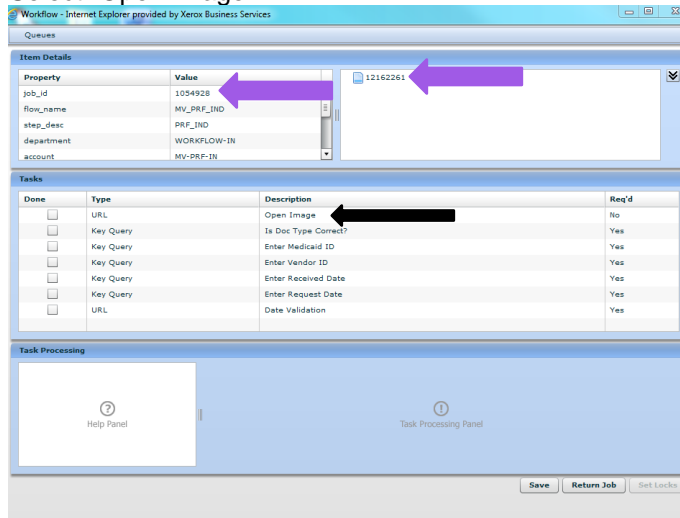
- 5) Select the first document at the top of the list



Your file queue has all the information you need to view the document

Example: Job_ID # 1054928 and Doc. # 12162261

- 6) Select “Open Image”





The image should pop up, click open

- View your image
- Answer the questions referring to the image, click ok after every question
- Click “Save” in the bottom right corner

Workflow - Internet Explorer provided by Xerox Business Services

Queues

Item Details

Property	Value
job_id	1054928
flow_name	MV_PRF_IND
step_desc	PRF_IND
department	WORKFLOW-IN
account	MV-PRF-IN

12162261

Tasks

Done	Type	Description	Req'd
<input checked="" type="checkbox"/>	URL	Open Image	No
<input type="checkbox"/>	Key Query	Is Doc Type Correct?	Yes
<input type="checkbox"/>	Key Query	Enter Medicaid ID	Yes
<input type="checkbox"/>	Key Query	Enter Vendor ID	Yes
<input type="checkbox"/>	Key Query	Enter Received Date	Yes
<input type="checkbox"/>	Key Query	Enter Request Date	Yes
<input type="checkbox"/>	URL	Date Validation	Yes

Task Processing

Save Return Job Set Locks

Entering Timesheets in FOCoSonline

Description/Purpose

Processing a timesheet

Software Access Required

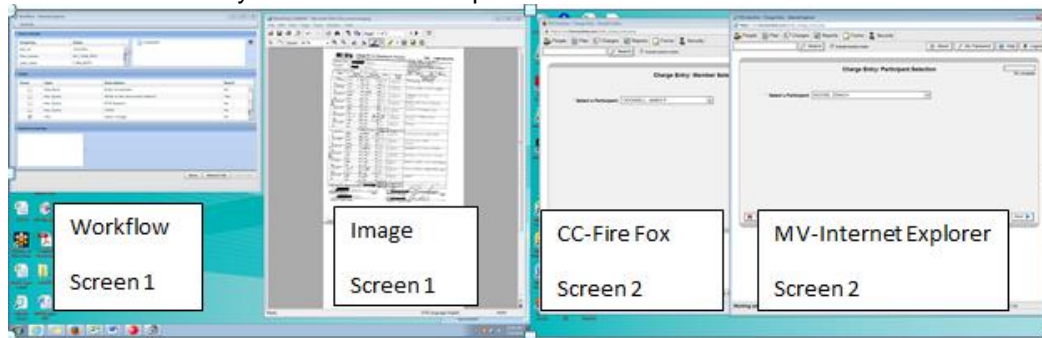
- Intraviewer (<http://intraviewer/>) Workflow queue
- FOCoSonline (<https://nm.focosonline.com/nm/>)
- Microsoft Office Document Imaging

Set up

You may set up your 2 monitors as shown in the example below

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Screen 2: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

Intraviewer

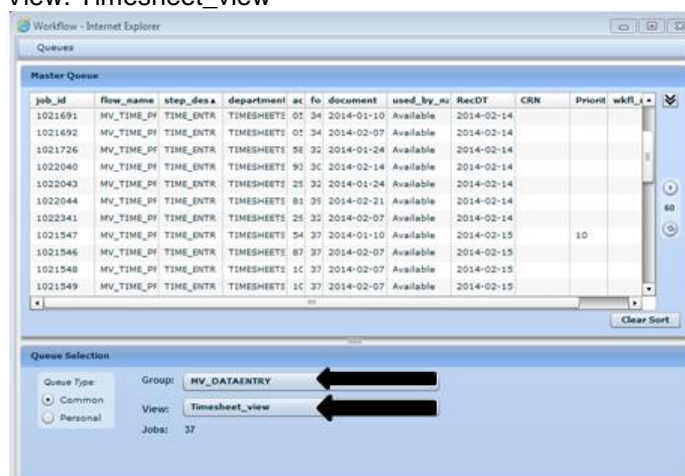
- 1) Select the yellow workflow folder



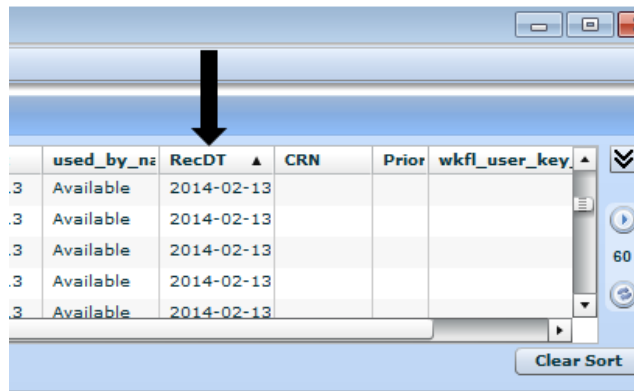
The workflow queue should pop up

Set your queue

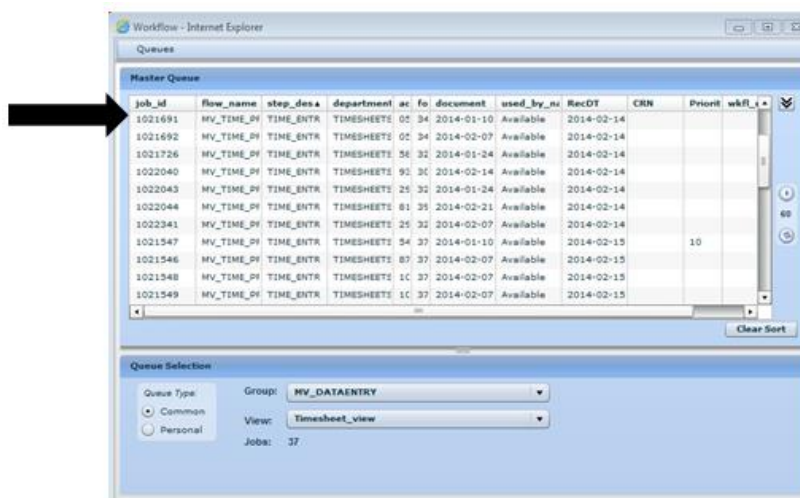
- 2) Group: MV_DataEntry
- 3) View: Timesheet_view



- 4) Set your “RecDT” to the oldest date



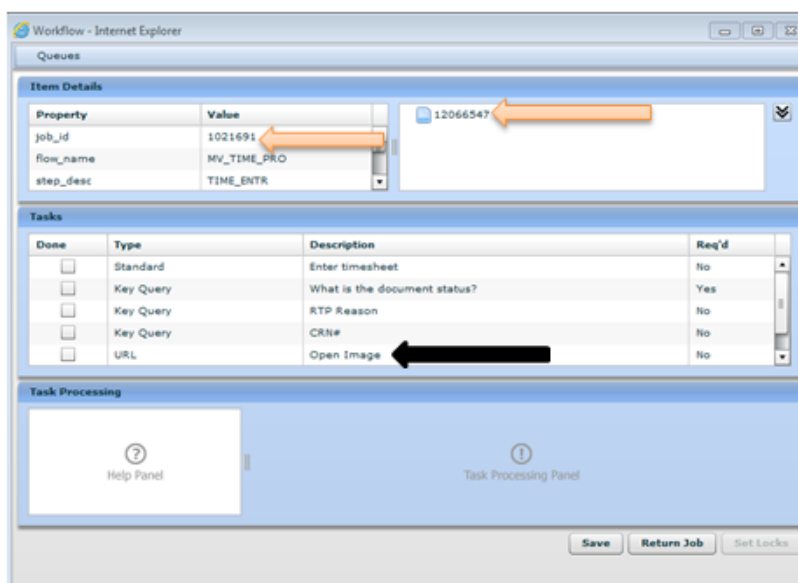
- 5) Select the first document at the top of the list



Your file queue has all the information you need to view the Timesheet

Job_ID # 1021691 and Doc. # 12066547

- 6) Select “Open Image”





The image should pop up
Click "Open"

- 7) Check for signatures and signature dates
- 8) Make sure everything is filled out on the timesheet (Employee name, participant/member name, service dates, in/out times and service codes)
- 9) If something is missing and it's a hard stop, follow "Creating an RTP" process

Any of the below situations may be processed, do not RTP:

Examples

- a) If the timesheet is showing 8 am to 4 = 8 hours (the pm is missing on the 4), process and add internal comments in FOCo**Online**
- b) If the time is showing 8 am to blank = 8 hours (the 4pm is missing), process and add internal comments in FOCo**Online**
- c) If the time is 8 to 4 = 8 hours (missing am and pm), process and add internal comments in FOCo**Online** (use the description/services provided to decide am and pm)
- d) If the time is 8 am to 9 am =1 hour for the whole timesheet (one or 2 entries missing am/pm), process and add internal comment in FOCo**Online** (used replicate same times as all other entries)

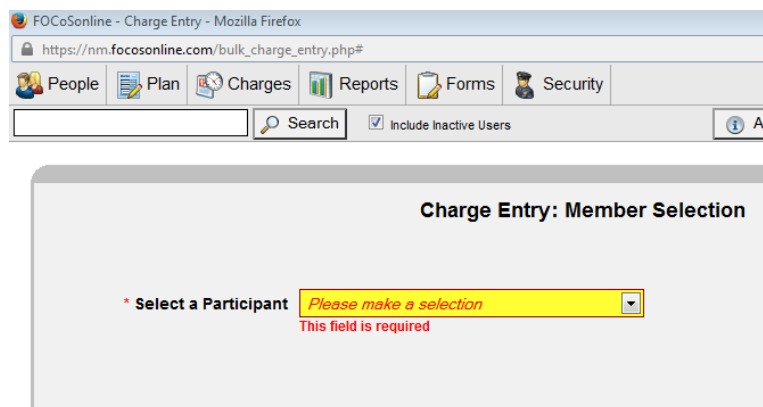
2-Week Self-Direction Timesheet for Payment						FAX 1-866-302-6787	
Employee Name:						Employee ID# (last 4 digits of employee's social security #)	
Member/Participant:						Is this a correction to a FOCoR Timesheet?	
Member/Participant's Date of Birth:						Begin Date	
						End Date	
Date	Time In Circle AM or PM	Time Out Circle AM or PM	Hours	Service Code	Service Provided (Please enter)		
Week 1	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
Total Hours for Week 1			→	Must not be over 40			
Week 2	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
	AM	PM	AM	PM			
Total Hours for Week 2			→	Must not be over 40			
Total Hours for Timesheet (2 weeks)			→	Must not be over 80			
Employee Signature				Date			
Employee Printed Name				Date			
Employee Signature				Date			
Employee Printed Name				Date			

Timesheet, 08/23/2013 v.1

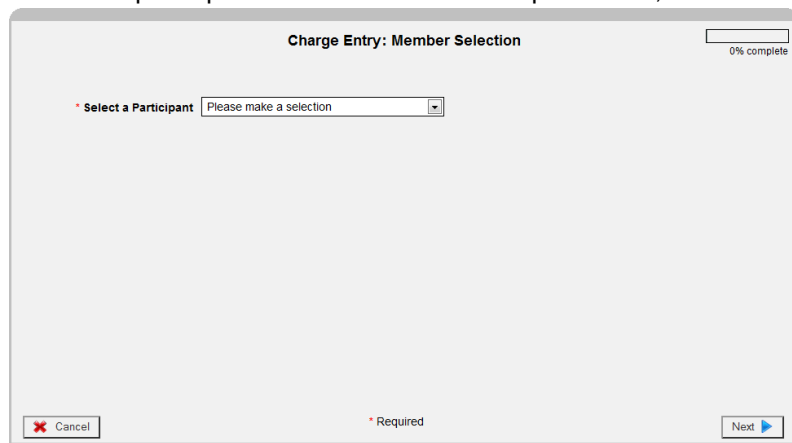
If everything checks out you may process the timesheet in FOCo**Online**

FOCoSonline

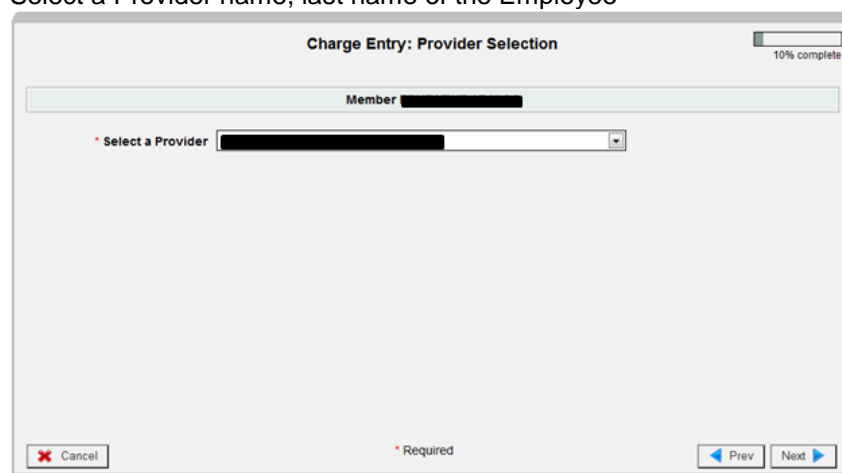
- 1) Click "Charges" button, select "Bulk Charge Entry" and check "Include Inactive Users" box



- 2) Select the participant/member's name to be processed, last name first



- 3) Start with the Centennial Care Firefox, if not in this CC system use the Mi Via system.
- 4) Click "Next" in bottom right corner
- 5) Select a Provider name, last name of the Employee



- 6) Click "Next" in bottom right corner

- 7) Select the pay period to be processed
- 8) Click “Next” in bottom right corner

- 9) Select all the dates requested on the timesheet

- 10) Click “Next” in bottom right corner
- 11) You will be in “Charge Entry: Enter Charges” screen
 - A. Verify you are working with the correct participant/member and employee compared to the timesheet you are processing. Re-check the employer of record (EOR) signature/signature dates and the employee signature/signature date. Make sure FOCosonline screen matches the timesheet.

- B) Use the scroll bar to the right to view the dates selected
- C) Enter the service code requested, rate should auto populate, time in/out use the military time, and service code.

Military Time	Standard Time
00:00	12:00 midnight
01:00	1:00am
02:00	2:00am
03:00	3:00am
04:00	4:00am
05:00	5:00am
06:00	6:00am
07:00	7:00am
08:00	8:00am
09:00	9:00am
10:00	10:00am
11:00	11:00am
12:00	12:00 midday
13:00	1:00pm
14:00	2:00pm
15:00	3:00pm
16:00	4:00pm
17:00	5:00pm
18:00	6:00pm
19:00	7:00pm
20:00	8:00pm
21:00	9:00pm
22:00	10:00pm
23:00	11:00pm
00:00	12:00 midnight

- D) If all the times are the same on timesheet you may select “Replicate” for the system to auto fill the dates selected.

\$23.95 x 26.62 x 52=33,152.55

Service Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override	Actions
Mon 01/27/2014	99509E - Homemaker	12.00/h						<input type="checkbox"/>	[Replicate] [Add] [Clear]
Tue 01/28/2014	Please make a selection	Please						<input type="checkbox"/>	[Replicate] [Add] [Clear]
Wed 01/29/2014	Please make a selection	Please						<input type="checkbox"/>	[Replicate] [Add] [Clear]
Thu 01/30/2014	Please make a selection	Please						<input type="checkbox"/>	[Replicate] [Add] [Clear]
Fri 01/31/2014	Please make a selection	Please						<input type="checkbox"/>	[Replicate] [Add] [Clear]

Cancel Prev Next

Check week 1 and week 2 for the total amount requested

Charge Entry: Enter Charges

50% complete

Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override	Actions
01/31/2014								<input type="checkbox"/>	[Replicate] [Add] [Clear]
Week 1 Totals:						40	\$400.00		[Clear Week 1]
Mon 02/03/2014	99509E - Homemaker	12.00/h	8:00 am	4:00 pm	8	\$96.00	99509	<input type="checkbox"/>	[Replicate] [Add] [Clear]
Tue 02/04/2014	99509E - Homemaker	12.00/h	8:00 am	4:00 pm	8	\$96.00	99509	<input type="checkbox"/>	[Replicate] [Add] [Clear]
Wed 02/05/2014	99509E - Homemaker	12.00/h	8:00 am	4:00 pm	8	\$96.00	99509	<input type="checkbox"/>	[Replicate] [Add] [Clear]
Thu 02/06/2014	99509E - Homemaker	12.00/h	8:00 am	4:00 pm	8	\$96.00	99509	<input type="checkbox"/>	[Replicate] [Add] [Clear]
Fri 02/07/2014	99509E - Homemaker	12.00/h	8:00 am	4:00 pm	8	\$96.00	99509	<input type="checkbox"/>	[Replicate] [Add] [Clear]
Week 2 Totals:						40	\$480.00		[Clear Week 2]

Cancel Prev Next

An employee may only be paid 40 hours per week. Any hours over the allotted 40 hours per week will need to be RTP'd for the remaining hours that have gone over the 40 hours.

See "Templates 2012-04-03" located in org_unit -I: drive

\\abq01\org_unit\Mi_Via\Data_Processing

Refer to "Creating an RTP" process.

12) Enter the Doc ID from Workflow in Internal Comments

Charge Entry: Enter Charges

50% complete

Fri 02/07/2014 99509E - Homemaker/Direct Support - Exception 12.00/hr 8:00 am 4:00 pm 8 \$96.00 99509e [Replicate] [Add] [Clear]

Week 2 Totals: 40 \$480.00 [Clear Week 2]

Progress Notes: [Check Spelling]

Internal Comments: Optional Date [] doc id # 555555 [Check Spelling]

[Cancel] [Prev] [Next]

13) Click "Next" in bottom right corner

This opens the "Confirmation" screen. Compare the FOCo**Online** entry with the timesheet.

Charge Entry: Confirmation

50% complete

Employee Name: [] Employee ID: 04936 Begin Date: 01/25/2014 End Date: 02/07/2014

Member Name: [] Employer of Record: [] Medicaid Number: []

Service Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override
Mon 01/27/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	\$96.00	99509e	
Tue 01/28/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	\$96.00	99509e	
Wed 01/29/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	\$96.00	99509e	
Thu 01/30/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	\$96.00	99509e	
Fri 01/31/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	\$96.00	99509e	
Week 1 Totals:					40	\$480.00		
Mon 02/03/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	\$96.00	99509e	

[Cancel] [Prev] [Next]

14) Click "Next" in bottom right corner

15) Click "Select All" to check off both boxes

Charge Entry: Final Actions

70% complete

Click "Finish" to create the Time Card for []

☒ Approve Charges

☒ Close Charges

[Select All] [Clear All]

[Cancel] [Prev] [Finish]

16) Click "Finish" in bottom right corner

Timesheet has been processed successfully

17) Go to Workflow queue, answer the questions, and click “Save” in bottom right corner

Done	Type	Description	Req'd
<input type="checkbox"/>	Standard	Enter timesheet	No
<input type="checkbox"/>	Key Query	What is the document status?	Yes
<input type="checkbox"/>	Key Query	RTP Reason	No
<input type="checkbox"/>	Key Query	CRN#	No
<input type="checkbox"/>	URL	Open Image	No

Entering Payment Request Form (PRF) in FOCoSonline

Description/Purpose

Processing a Payment Request form

Software Access Required

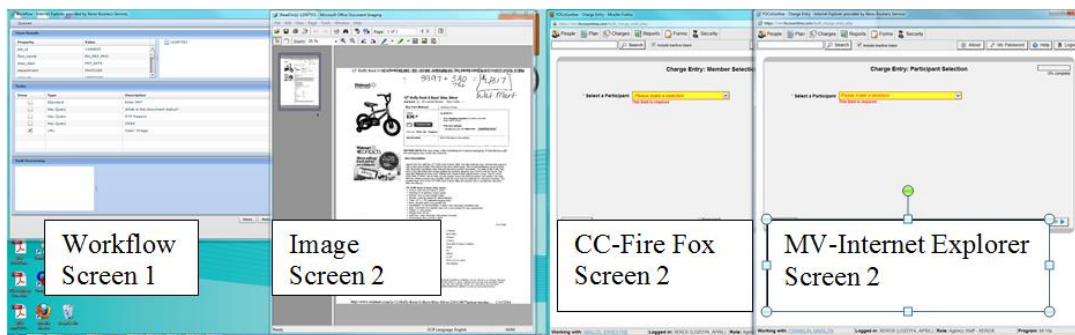
- Intraviewer (<http://intraviewer/>) (Workflow queue)
- FOCoSonline (<https://nm.focosonline.com/nm/>)
- Microsoft Office Document Imaging

Set up

You may set up your 2 monitors as shown in the example below

Screen 1: Your left screen will have the workflow queue and beside it will be your Microsoft Office imaging

Screen 2: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

Intraviewer

- 1) Select the yellow workflow folder

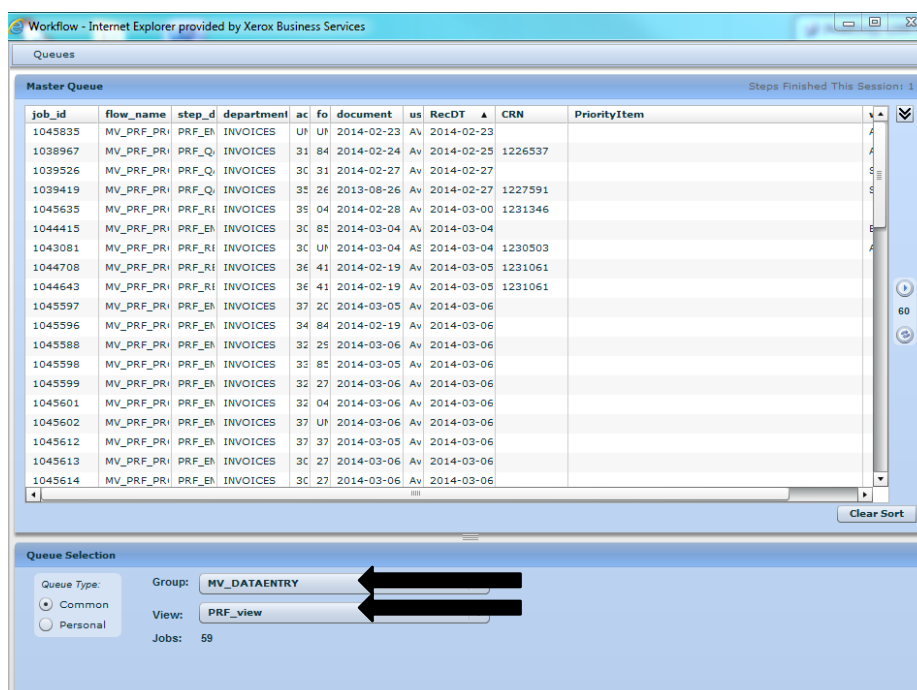


Your workflow queue should pop up

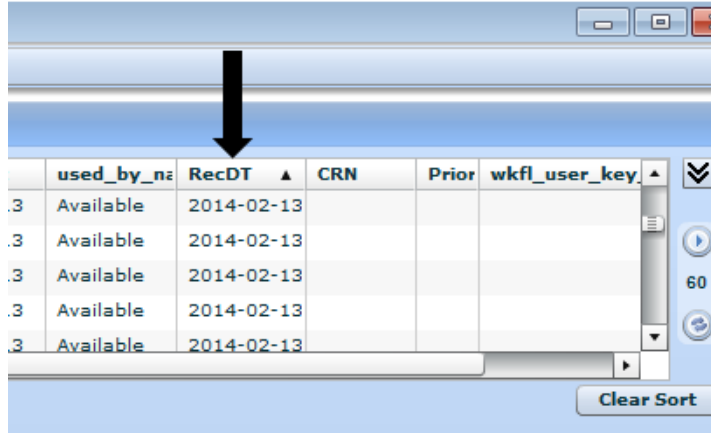
Set your queue

Group: MV_ DATAENTRY

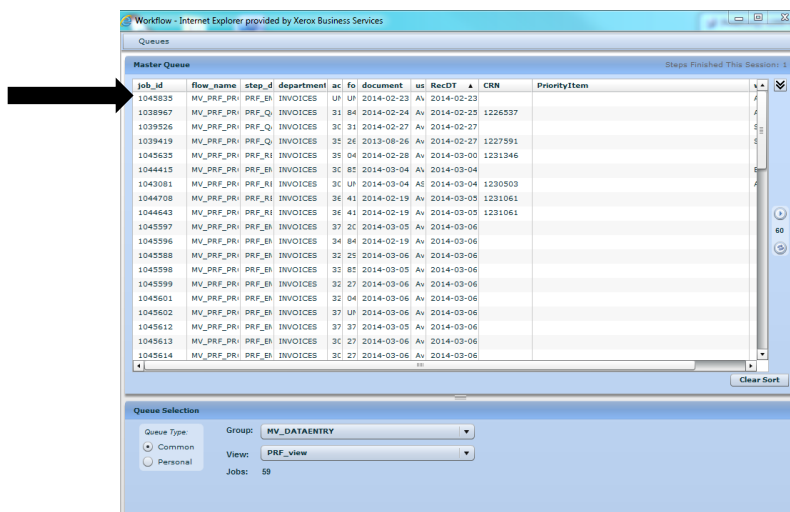
View: PRF_view



- 2) Set your “RecDT” to the oldest date

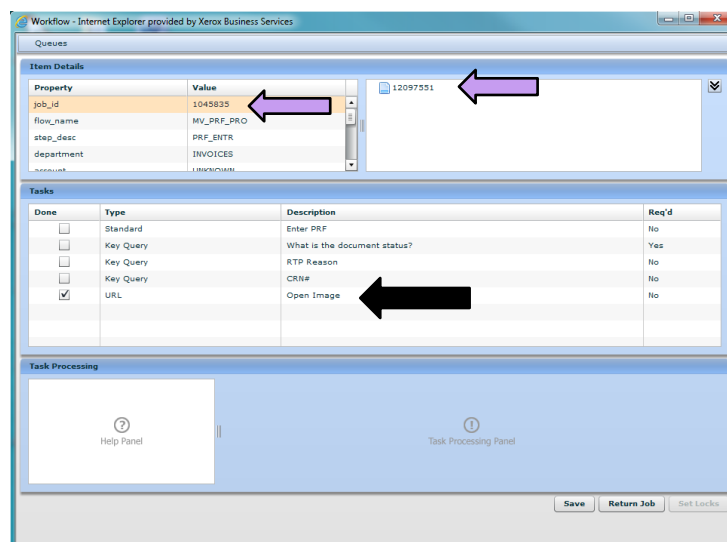


- 3) Select the first document at the top of the list



Your file queue has all the information you need to view the PRF
Job_ID # 1045835 and Doc. # 12097551

- 4) Select the Open Image





The image should pop up, click “Open”

- 2) Check for signatures and signature dates
- 3) Make sure everything is filled out on the PRF and invoice (Payee/vendor name, participant/member name, service dates, item being purchased, payment amount, and service codes)
- 4) If something is missing and it's a hard stop, follow “Creating an RTP” process

Self-Direction PAYMENT REQUEST FORM	
The requested item and amount must be approved in your Support Plan and Budget. DO NOT use your own money to pay vendors. Xerox-FMA CANNOT reimburse you.	
ATTACH A VENDOR COST QUOTE OR VALID INVOICE WITH THIS PAYMENT REQUEST FORM	
<div style="display: flex; justify-content: space-between;"> <div> Xerox, Inc. P.O. Box 27460 Albuquerque, NM 87125 </div> <div style="text-align: right;"> Phone: 1-866-916-0310 FAX: 1-866-302-6787 </div> </div>	
Member/Participant Name	HARD STOP
Member/Participant Signature	HARD STOP
Medicaid Card Number	
Waiver Service Procedure Code/Modifier	Soft STOP
Describe Item Being Purchased	HARD STOP
Request Date	
Full Payment Amount (including all taxes)	HARD STOP
<div style="background-color: #f2f2f2; padding: 5px;"> HARD STOP </div>	
Payee Name (Vendor Name)	Vendor Federal Tax ID#
Address Line 1	
Address Line 2	
City	State Zip
CHECKS WILL BE MAILED TO MEMBER/PARTICIPANT OR EMPLOYER OF RECORD	
Instructions: 1. "Request Date" and purchase must be within date of current approved SDCB budget 2. The "Waiver Service Procedure Code and Modifier" field must be filled in correctly 3. The request MUST BE APPROVED on the SSP Worksheet and Budget 4. Payment amount must include price of good or service and all applicable taxes 5. Submit a cost quote or Standard Invoice as required with this payment request form	

Payment Request Form, 8/23/2013 v.1

Invoices

Invoices may be received two ways on a Payment Request Form (PRF) or on an Invoice for Non-Timesheet Provider Agency/Contractor

Entering an Invoice

1. Click "Charges button and select "Bulk Charge Entry" you will be directed to "Charge Entry: Member Selection" screen: Member Selection (CC) /Participant Selection (MV)

2. Select the Participant/Member and click "Next" in bottom right corner
3. Select the Rendering Provider and click "Next" in bottom right corner
4. You will be directed to "Charge Entry: Select Dates" screen

5. Enter:
 - Start Date (first date of service, if none use first date of date range, if none use bill date and if no date and this is a quote use the PRF request date, if no request date use the fax in date)
 - End Date (invoice date/if none use the PRF request date, if none use fax in date)
 - If you have more than one entry to enter for the same day, add the amount together.
 - Click "Next" in bottom right corner

Charge Entry: Select Day(s) of Service

30% complete

July 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			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	

August 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						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					

Select All Clear All

Cancel

Prev Next

6. Enter:

- Start Date =
 - Bills – Select first service date
 - Invoices – Select all dates to be keyed
 - Quotes – Select PRF request date

7. You will be directed to “Charge Entry: Review Previous Entries” screen

- Identify if the invoice is a duplicate or a new request. Review the service date ranges and/or due dates to identify any duplicate requests.
- If a new request, click “Next” in bottom right corner

Charge Entry: Review Previous Entries

40% complete

Contractor: [REDACTED]

Invoice Date: 02/12/2014

Invoice Number:

Member: [REDACTED]

Status: [REDACTED] BATCH #4159

PRF Number: 02/12/2014

Employer of Record: [REDACTED]

Date Worked	Service Code	Units	Rate	Total Charge	Services Provided
Wed 02/12/2014	T1999CELL - Cell Phone Service	1.00	\$56.55/variable	\$56.55	CELL PHONE SERVICE DUE BY 2/22/14
Invoice Totals:		1.00		\$56.55	

Contractor: [REDACTED]

Invoice Date: 02/12/2014

Invoice Number:

Member: [REDACTED]

Status: CLOSED

PRF Number: 02/12/2014

Employer of Record:

Date Worked	Service Code	Units	Rate	Total Charge	Services Provided
Invoice Totals:				\$	

Cancel

Prev Next

8. You will be directed to “Charge Entry: Enter Charges” screen

Charge Entry: Enter Charges

50% complete

Contractor Name: [REDACTED]

Member Name: [REDACTED]

Contractor ID: PWD

Employer of Record: [REDACTED]

Begin Date: 03/05/2014

Medicaid Number: [REDACTED]

End Date: 03/05/2014

Goal Information:

Service Code: T1999CELL - Cell Phone Service

Plan Dates: 08/01/2013 - 07/31/2014

Total projected amount for this goal: \$756.00

Goal:
V1AF Cell Phone Service - I completely rely on my cell phone to obtain information such as bus schedules and Doctor's appointments, contacting different resources, etc. I also have it with me at all times in case of emergency.

How this Goal will be achieved:
V1AF Cell phone service at \$63 per month = \$756.00 annually

Invoice Date: 03/05/2014

Invoice Number: [REDACTED]

PRF Number: [REDACTED]

Service Date	Service Code	Rate	Units	Total Pay	Services Provided	Duplicate Charge Override	Timely Filing Override	Actions

Cancel

Prev Next

9. Review the Goal information while processing a request.

- review the service code
- the rate
- the item/services provided

10. Enter the request dates and amount:

- Invoice Date: prefilled from “Charge Entry: Select Dates” screen
- Invoice Number: located on the invoice (if the invoice does not have one, leave blank)
- PRF Number: enter “Request Date” located on the PRF (if no request date, enter the fax date).

11. Scroll down:

- Select the Service Code: example T1999Cell-Cell Phone
- Select the Variable (enter the requested amount on the PRF)
 - Make sure this amount is within the allotted amount (if requesting more than the allotted amount, process the allotted amount and RTP the rest. See RTP section)
- Enter the units, Example: 1
- In “Services Provided” notate the description of the request, Example: Cell phone service 3/05/14-4/05/14 Due 3/30/14
- Enter the Doc ID number in “Internal Comments”, click “Next” in bottom right corner

12. You will be directed to “Charge Entry: Confirmation” screen

- Compare the entry in FOCoSonline to the PRF/invoice
- If everything is correct, click “Next” in bottom right corner

Charge Entry: Confirmation 60% complete

Contractor Name: T-MOBILE		Contractor ID: PWD	Begin Date: 03/05/2014	End Date: 03/05/2014
Member Name: [REDACTED]		Employer of Record: [REDACTED]	Medicaid Number: [REDACTED]	
Invoice Date: 03/05/2014		Invoice Number:	PRF Number: 03/05/14	

Service Date	Service Code	Rate	Units	Total Pay	Services Provided	Duplicate Charge Override	Timely Filing Override
Wed 03/05/2014	T1999CELL - Cell Phone Service	\$63.00/variable	1	\$63.00	Cell phone service 3/05/14-4/05/14 Due 3/30/14		
Invoice Totals				1	\$63.00		

Progress Note
Internal Comment
 doc # 12345678910

13. You will be directed to “Charge Entry: Final Actions” screen
- Click “Select All” to check off the boxes
 - Click “Finish” in bottom right corner

Charge Entry: Final Actions 70% complete

Click "Finish" to create the invoice for T-MOBILE.

<input checked="" type="checkbox"/> Submit Draft Charges
<input checked="" type="checkbox"/> Approve Charges
<input checked="" type="checkbox"/> Close Charges

Working a PRF before entering

- A. Verify signature and signature date of EOR and/or participant/member on PRF.
- B. Signature and signature date of vendor/contractor on Non-Timesheet Provider Agency/Contractor form
 - Do not key if not signed
- C. We may process a PRF if the request has more than one service code as long as there is a requested amount for each service code
- D. PRF QUOTES/ INVOICES- Taxes -If we receive any PRF with the requested amount total with taxes of an item and it doesn't show the taxes on the invoice/quote, but it is allowed in the plan. It is ok to process, just make sure to notate in the internal comments. It is also fine if there is hand writing on the invoice indicating the taxes. Make sure the taxes are in the range of what taxes should be.
- E. IF the PRF is requesting a massage and or service. If the PRF is requesting more hours / unites then allotted in plan, we may process as long as the rate is matching in the system. This will allow the participant/member/ EOR to manage their plan budget. If the participant/member/ /EOR does not manage their monthly allotted budget, the plan will be over plan budget before the year is over.

Linking an Employee with a Participant/Member

If you try to add an Employee to a Participant's/member's plan but the Employee does not display in the Provider drop-down list.

- Search for the Employee by entering their name in the search field and click "Search" button.
- If the Employee does not exist in the FOCo**Online** system, contact Enrollment to see if they have any record of this person. (See screenshot below for an example of the Employee not being found in the system)

GCEOnline - Search - Mozilla Firefox

People Plan Charges Claims Reports Forms Admin Config Security Dev

jane smith Search Include Inactive Users About My Password Help Logout

[Search]

You searched for: **jane smith** 0 users found

Working with: Logged in: Whitney, Jessica Program: Mi Via

Done nm.gcesonline.us

- If the Employee does exist in the FOCo**Online** system, click on the link to view their information.
- If the Employee exists but does not have an Employer relationship the Employee has not been associated to the participant/member. (See the screenshot below for an example of an Employee with no Employer relationship.)

https://nm.gcesonline.us/view_user.php?NAV_Target_User_ID=9601

People Plan Charges Claims Reports Forms Admin Config Security Dev

Search Include Inactive Users About My Password Help Logout

[View User]

Security Information: Edit

First Name: Last Name: Date of Birth: Last 4 of SSN: Login Name:

Physical Address: Edit

County:

Mailing Address: Edit

Contact Information: Edit

Employee Details: Change Active Status Edit

Employee Roles: Employee Title: Gender: Male (M) Taxpayer ID (SSN or ITIN): Ethnicity: Date of Birth: Age: GCES Employee ID: FMA Employee ID:

Employment Information: Add New Employer Relationship

- Contact Enrollment and ask them if they have received the paperwork for the Employee. If Enrollment has the paperwork, ask them to create the relationship.

Invoice Services vs. Hourly Services

When you are adding a Provider to a Goal on a Plan and the Service Delivery Method for the service code can be either Hourly or Variable/Each, you must use the correct one:

- Variable/Each – for Contractors only
- Hourly – for Employees only

CORRECT Employee Hourly Example - The provider type is Employee and the Service Delivery Method is correctly selected as Hourly.

The screenshot displays the 'Service Code' T1999HG-H with the description 'House Related Goods and Services Hourly'. The 'Monthly Budgets' table shows values for Oct 2009 through Sep 2010, with a total projected amount of \$152.94. The goal is 'Outdoor chore svc'. In the configuration section, the 'Provider' is selected as 'Employee', the 'Service Delivery Method' is 'Hourly', the 'Reimbursement Method' is 'Manual', the 'Pay Rate' is \$10.00, and the 'Job Code' is 'Regular'. The 'Effective Date' is 10/01/2009.

Month	2009	2010
Oct	\$0.00	\$0.00
Nov	\$0.00	\$0.00
Dec	\$0.00	\$0.00
Jan	\$0.00	\$0.00
Feb	\$0.00	\$0.00
Mar	\$0.00	\$0.00
Apr	\$0.00	\$0.00
May	\$0.00	\$0.00
Jun	\$23.08	\$43.28
Jul	\$43.28	\$43.30
Aug	\$43.28	\$43.30
Sep	\$43.30	\$43.30

INCORRECT Services Provided Example - The provider type is Employee and the Service Delivery Method is incorrectly selected as Variable/Each.

The screenshot displays the 'Service Code' T1999HG-I with the description 'Household Related Goods and Services Item/Invoice'. The 'Monthly Budgets' table shows values for Oct 2009 through Sep 2010, with a total projected amount of \$439.95. The goal is 'Headset with microphone; Refill-Daytime Planner/Office Supplies; Hanging hammock chair and stand; TV-DVD-VHS Player-Warranty and cable bundle'. In the configuration section, the 'Provider' is selected as 'Employee', but the 'Service Delivery Method' is incorrectly set to 'Variable/Each'. The 'Reimbursement Method' is 'Manual', the 'Pay Rate' is \$10.00, and the 'Job Code' is 'Regular'. The 'Effective Date' is 10/01/2009.

Month	2009	2010
Oct	\$0.00	\$0.00
Nov	\$0.00	\$0.00
Dec	\$0.00	\$0.00
Jan	\$0.00	\$0.00
Feb	\$0.00	\$0.00
Mar	\$0.00	\$0.00
Apr	\$0.00	\$0.00
May	\$0.00	\$0.00
Jun	\$66.40	\$124.51
Jul	\$124.51	\$124.51
Aug	\$124.51	\$124.51
Sep	\$124.51	\$124.51

CORRECT Contractor Hourly Example - The provider type is Contractor and the Service Delivery Method is correctly selected as Variable/Each.

Service Code: T1999HG-I **Service Code Description:** Household Related Goods and Services Item/Invoice

Monthly Budgets:

Oct. 2009:	\$0.00	Nov. 2009:	\$0.00	Dec. 2009:	\$0.00	Jan. 2010:	\$0.00
Feb. 2010:	\$0.00	Mar. 2010:	\$0.00	Apr. 2010:	\$0.00	May. 2010:	\$0.00
Jun. 2010:	\$66.40	Jul. 2010:	\$124.51	Aug. 2010:	\$124.51	Sep. 2010:	\$124.53

Total projected amount for this goal: \$439.95

Goal:
Headset with microphone; Refill-Daytime Planner/Office Supplies; Hanging hammock chair and stand; TV-DVD-VHS Player-Warranty and cable bundle

How this Goal will be achieved:

Provider: [Filter] [Effective Date: 10/01/2009]

Service Delivery Method: Variable/Each

Reimbursement Method: Manual

Pay Rate: \$ 50.00

INCORRECT Services Provided Example - The provider type is Contractor and the Service Delivery Method is incorrectly selected as Hourly.

Service Code: T1999HG-H **Service Code Description:** House Related Goods and Services Hourly

Monthly Budgets:

Oct. 2009:	\$0.00	Nov. 2009:	\$0.00	Dec. 2009:	\$0.00	Jan. 2010:	\$0.00
Feb. 2010:	\$0.00	Mar. 2010:	\$0.00	Apr. 2010:	\$0.00	May. 2010:	\$0.00
Jun. 2010:	\$23.08	Jul. 2010:	\$43.28	Aug. 2010:	\$43.28	Sep. 2010:	\$43.30

Total projected amount for this goal: \$152.94

Goal:
Outdoor chore svc

How this Goal will be achieved:

Provider: [Filter] [Effective Date: 10/01/2009]

Service Delivery Method: Hourly

Reimbursement Method: Manual

Pay Rate: \$ 50.00

Entering Mileage In FOCOnline

Description/Purpose

Processing a Mileage sheet

Software Access Required

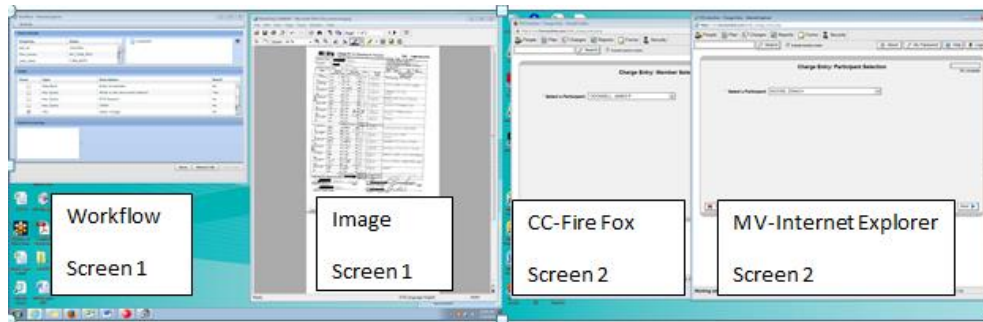
- Intraviewer (<http://intraviewer/>) Workflow queue
- FOCOnline (<https://nm.focosonline.com/nm/>)
- Microsoft Office Document Imaging

Set up

You may set up your 2 monitors as shown in the example below

Screen 1: Your left screen will have the workflow queue and beside it will be your Microsoft Office imaging

Screen 2: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

Intraviewer

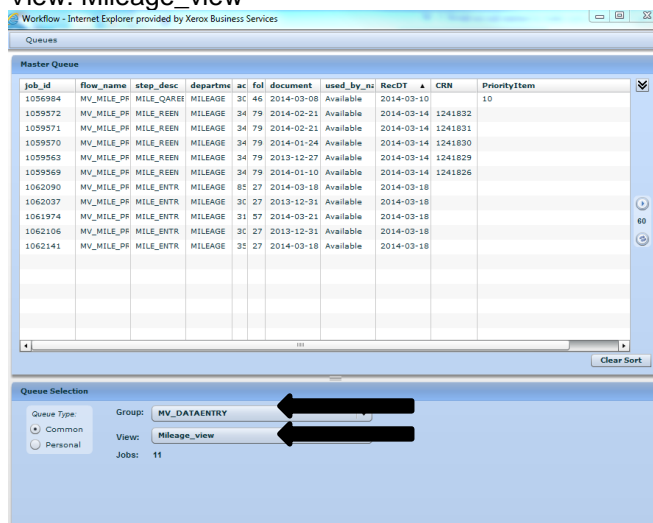
- 1) Select the yellow workflow folder



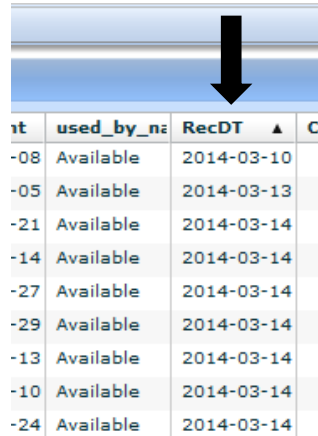
Your workflow queue should pop up

Set your queue

- 2) Group: MV_DataEntry
- 3) View: Mileage_view

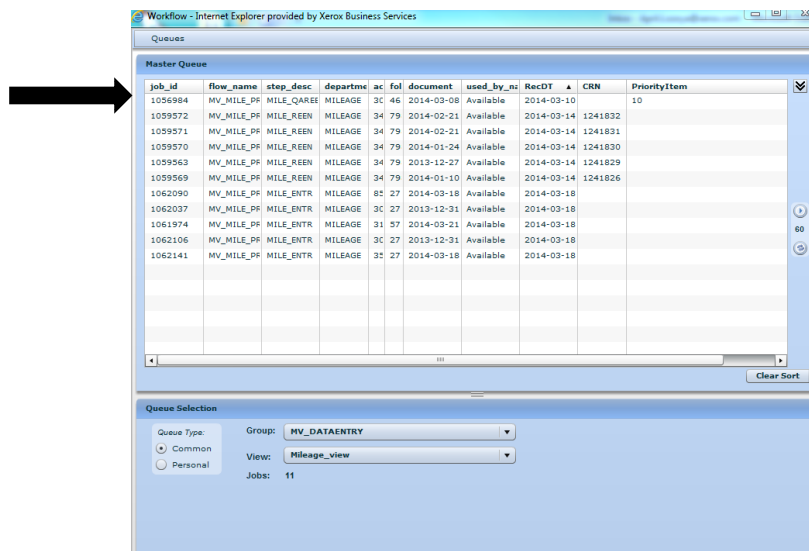


4) Set your “RecDT” to the oldest date



Job ID	used_by_name	RecDT	CRN
-08	Available	2014-03-10	
-05	Available	2014-03-13	
-21	Available	2014-03-14	
-14	Available	2014-03-14	
-27	Available	2014-03-14	
-29	Available	2014-03-14	
-13	Available	2014-03-14	
-10	Available	2014-03-14	
-24	Available	2014-03-14	

5) Select the first document at the top of the list



Workflow - Internet Explorer provided by Xerox Business Services

Queues

Master Queue

Job ID	flow_name	step_desc	departme	ac	fol	document	used_by_name	RecDT	CRN	PriorityItem
1056984	MV_MILE_DF	MILE_QAREE	MILEAGE	3C	46	2014-03-08	Available	2014-03-10		10
1059572	MV_MILE_DF	MILE_REEN	MILEAGE	34	79	2014-02-21	Available	2014-03-14	1241832	
1059571	MV_MILE_DF	MILE_REEN	MILEAGE	34	79	2014-02-21	Available	2014-03-14	1241831	
1059570	MV_MILE_DF	MILE_REEN	MILEAGE	34	79	2014-01-24	Available	2014-03-14	1241830	
1059563	MV_MILE_DF	MILE_REEN	MILEAGE	34	79	2013-12-27	Available	2014-03-14	1241829	
1059569	MV_MILE_DF	MILE_REEN	MILEAGE	34	79	2014-01-10	Available	2014-03-14	1241826	
1062090	MV_MILE_DF	MILE_ENTR	MILEAGE	85	27	2014-03-18	Available	2014-03-18		
1062037	MV_MILE_DF	MILE_ENTR	MILEAGE	3C	27	2013-12-31	Available	2014-03-18		
1061974	MV_MILE_DF	MILE_ENTR	MILEAGE	31	57	2014-03-21	Available	2014-03-18		
1062106	MV_MILE_DF	MILE_ENTR	MILEAGE	3C	27	2013-12-31	Available	2014-03-18		
1062141	MV_MILE_DF	MILE_ENTR	MILEAGE	32	27	2014-03-18	Available	2014-03-18		

Queue Selection

Queue Type: ☐ Common ☐ Personal

Group: MV_DATAENTRY

View: Mileage_view

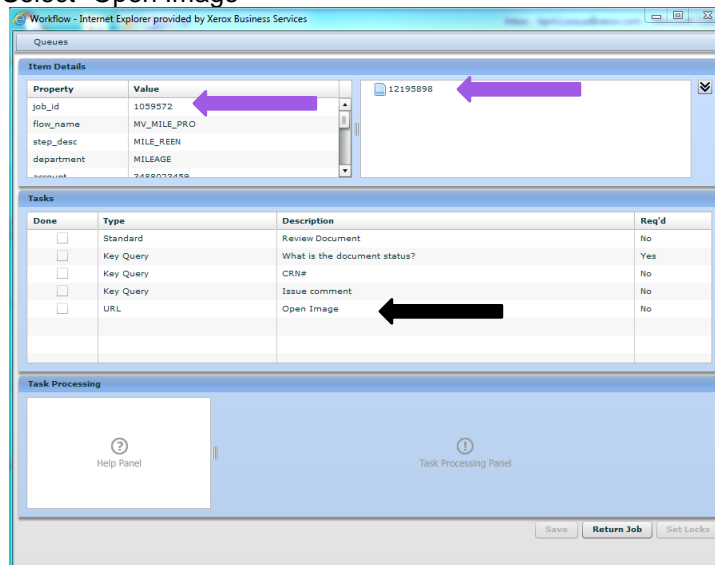
Jobs: 11

Clear Sort

Your file queue has all the information you need to view the Mileage document

Job_ID # 1059572 and Doc. # 12195898

6) Select “Open Image”



Workflow - Internet Explorer provided by Xerox Business Services

Queues

Item Details

Property	Value
Job_ID	1059572
flow_name	MV_MILE_PRO
step_desc	MILE_REEN
department	MILEAGE

12195898

Tasks

Done	Type	Description	Req'd
<input type="checkbox"/>	Standard	Review Document	No
<input type="checkbox"/>	Key Query	What is the document status?	Yes
<input type="checkbox"/>	Key Query	CRN#	No
<input type="checkbox"/>	Key Query	Issue comment	No
<input type="checkbox"/>	URL	Open Image	No

Task Processing

Help Panel

Task Processing Panel

Save Return Job Set Locks



The image should pop up
Click "Open"

- 7) Check for signatures and signature dates
- 8) Make sure everything is filled out on the mileage sheet (Employee name, participant/member name, service dates, odometer start and end, total miles, and service codes)
- 9) If something is missing and it's a hard stop, follow "Creating an RTP" process

Self-Direction 2-Week Employee MILEAGE Sheet						FAX 1-866-302-6787	
Driver Name (Employee):				Employee ID# (last 4 digits of Employee's social security #)			
Member/Participant:				Is this a correction to a PRIOR Mileage Sheet? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Member's Date of Birth:		Service Code: T2049		Pay Period Begin Date		Pay Period End Date	
Vehicle Year	Vehicle Model	Driver's License #		License Plate #			
Date	Location (From)	Location (To)	Odometer Start	Odometer End	Total Miles	Purpose of Trip	
<div style="display: flex; justify-content: space-between;"> Hard stop Hard Stop Hard stop </div>							
Week 1							
Total Miles for Week 1 →							
Week 2							
Total Miles for Week 2 →							
Total Miles for Pay Period (2 weeks) →							
Employee Signature				Employer (EOR) Signature			
Date				Date			
Employee Printed Name				Employer (EOR) Printed Name			
Hard stop				Hard stop			

Employee Mileage Sheet, 08/23/2013 v.1

If everything checks out you may process the Mileage in FOCoSonline

FOCoSonline

- 11) Click “Charges” button, select “Bulk Charge Entry” and check “Include Inactive Users” box

FOCoSonline - Charge Entry - Mozilla Firefox
https://nm.focosonline.com/bulk_charge_entry.php#

People Plan Charges Reports Forms Security

Search Include Inactive Users

Charge Entry: Member Selection

* Select a Participant Please make a selection
This field is required

- 12) Select the participant's /member's name to be processed, last name first

Charge Entry: Member Selection 0% complete

* Select a Participant Please make a selection

Cancel Required Next

- 13) Start with Centennial Care Firefox, if not in this CC system you will need to use the Mi Via system.

- 14) Click “Next” in bottom right corner

- 15) Select a Provider name, last name of the employee or vendor

Charge Entry: Provider Selection 10% complete

Member [Redacted]

* Select a Provider [Redacted]

Cancel Required Prev Next

- 16) Click “Next” in bottom right corner

- 17) Select the pay period to be processed (if vendor enter date range like a PRF)

18) If there is more than one entry per day, add the days together

Charge Entry: Select Dates 20% complete

Member [redacted] and [redacted]

* Select a Pay Period: 03/08/2014 - 03/21/2014

* Number of Entries Per Day: 1

Cancel * Required Prev Next

19) Click "Next" in bottom right corner

20) Select the dates requested on the mileage sheet

21) Click "Next" in bottom right corner

Charge Entry: Select Day(s) of Service 30% complete

March 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						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					

Select All Clear All

Cancel Prev Next

22) You will be in "Charge Entry: Enter Charges" screen

- A. Verify you have the correct participant/member and employee compared to the mileage sheet you are processing. Re-check the employer of record (EOR) signature/signature date and the employee signature/signature date. Verify FOCosonline screen matches the mileage sheet.

Charge Entry: Enter Charges 50% complete

Plan Dates: 12/01/2013 - 11/30/2014

Total projected amount for this goal: \$7,200.00

Goal:
 Mileage - Due to my brain injury, I am not able to navigate on my own. I also suffer from an unsteady gait and am prone to falls so this limits the amount of walking I can do without someone with me. I like to be out in the community but can't drive on my own. Being able to reimburse my homemaker for mileage would make me feel better about having her drive me around.

I need to be able to continue to reimburse my paid supports any mileage they occur on my behalf. I need to be able to access my community on a daily basis. Its 75 miles round trip to UNM/CNM. I want to be able to go to these campuses Monday thru Friday. People go to work every day and I want to be able to access my community every day. I am not enrolled with either school but, I do access the library and community resources that they have available. I want to be able to reeducate myself and rehabilitate my brain injury. Going to the campuses daily allows me a sense of belonging. I will continue to have access to different learning opportunities, to increase my ability to read, write, speak, and listen. I will also have the opportunity to increase my socialization skills.

How this Goal will be achieved:
 Mileage-1500 miles per month X .40 per mile x 12 months cost to budget = \$7,200

Service Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override	Actions
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Cancel Prev Next

- B. Use the scroll bar to the right to view the dates selected
- C. Enter the service code requested, rate should auto populate, enter units and description of services provided
- D. If all the times are the same on time sheet you may select the “replicate” so the system will auto fill the dates you have selected.

Service Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override	Actions
Sat 03/08/2014	T2049 - Transportation	0.40/mi							[Replicate] [Add] [Clear]
Sun 03/09/2014	Please make a selection	Please							[Replicate] [Add] [Clear]
Mon 03/10/2014	Please make a selection	Please							[Replicate] [Add] [Clear]
Tue 03/11/2014	Please make a selection	Please							[Replicate] [Add] [Clear]
Wed 03/12/2014	Please make a selection	Please							[Replicate] [Add] [Clear]
Thu 03/13/2014	Please make a selection	Please							[Replicate] [Add] [Clear]

Check week 1 and week 2 for the total amount requested matches the miles on Mileage sheet received

Service Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override	Actions
Fri 03/14/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Week 1 Totals:									
Sat 03/15/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Sun 03/16/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Mon 03/17/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Tue 03/18/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Wed 03/19/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Thu 03/20/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Week 2 Totals:									

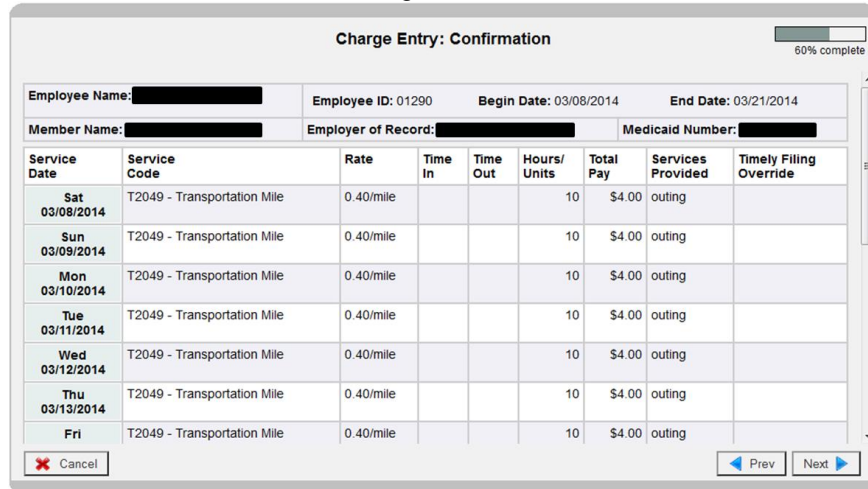
RTP template is “Templates 2012-04-03” located in org_unit -I: drive \\abq01\org_unit\Mi_Via\Data_Processing
Refer to “Creating an RTP” process.

23) Enter the Doc ID from Workflow in “Internal Comments”

Service Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override	Actions
03/19/2014									[Clear]
Thu 03/20/2014	T2049 - Transportation	0.40/mi			10	\$4.00	outing		[Replicate] [Add] [Clear]
Week 2 Totals:									
					60	\$24.00			[Clear Week 2]
Progress Notes:									
<input type="button" value="Check Spelling"/>									
Internal Comments:									
Optional Date <input type="text"/>									
doc. id # 11111									
<input type="button" value="Check Spelling"/>									

24) Click "Next" in bottom right corner

You will be at the "Charge Entry: Confirmation" screen. Verify the information entered in FOCO^{Online} matches the mileage sheet.

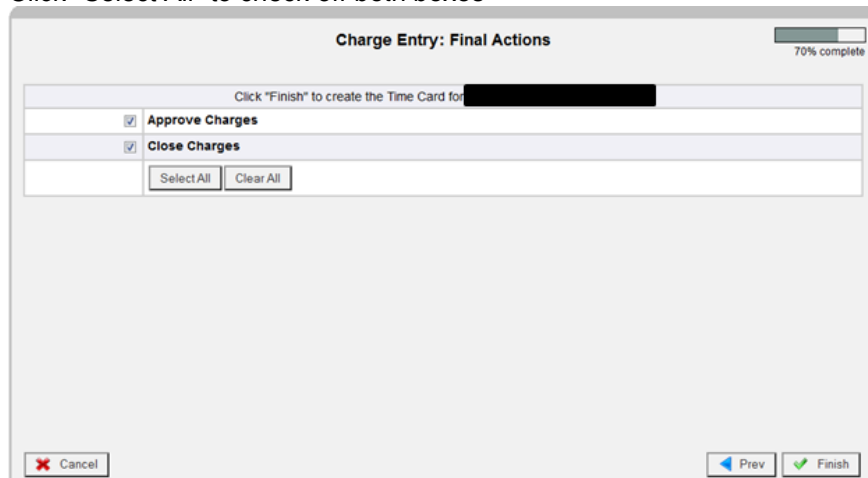


The "Charge Entry: Confirmation" screen displays a progress bar at the top right indicating 60% completion. It contains a form with the following fields: Employee Name (redacted), Employee ID: 01290, Begin Date: 03/08/2014, End Date: 03/21/2014, Member Name (redacted), Employer of Record (redacted), and Medicaid Number (redacted). Below these fields is a table with the following columns: Service Date, Service Code, Rate, Time In, Time Out, Hours/Units, Total Pay, Services Provided, and Timely Filing Override. The table contains six rows of data for dates from Saturday, 03/08/2014 to Friday, 03/13/2014. Each row shows a service code of T2049 - Transportation Mile, a rate of 0.40/mile, 10 hours/units, and a total pay of \$4.00, with the service provided being "outing". At the bottom left is a "Cancel" button with a red X icon. At the bottom right are "Prev" and "Next" buttons with left and right arrow icons respectively.

Service Date	Service Code	Rate	Time In	Time Out	Hours/Units	Total Pay	Services Provided	Timely Filing Override
Sat 03/08/2014	T2049 - Transportation Mile	0.40/mile			10	\$4.00	outing	
Sun 03/09/2014	T2049 - Transportation Mile	0.40/mile			10	\$4.00	outing	
Mon 03/10/2014	T2049 - Transportation Mile	0.40/mile			10	\$4.00	outing	
Tue 03/11/2014	T2049 - Transportation Mile	0.40/mile			10	\$4.00	outing	
Wed 03/12/2014	T2049 - Transportation Mile	0.40/mile			10	\$4.00	outing	
Thu 03/13/2014	T2049 - Transportation Mile	0.40/mile			10	\$4.00	outing	

25) Click "Next" in bottom right corner

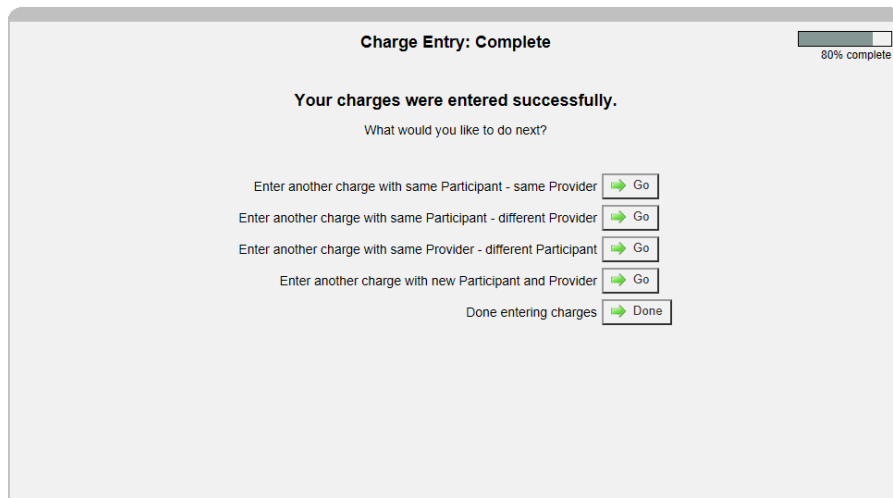
26) Click "Select All" to check off both boxes



The "Charge Entry: Final Actions" screen displays a progress bar at the top right indicating 70% completion. It contains a form with the following fields: Click "Finish" to create the Time Card for (redacted). Below this are two checkboxes: "Approve Charges" and "Close Charges", both of which are checked. Below the checkboxes are two buttons: "Select All" and "Clear All". At the bottom left is a "Cancel" button with a red X icon. At the bottom right are "Prev" and "Finish" buttons with left and right arrow icons respectively.

27) Click "Finish" in bottom right corner

This means you have processed the mileage successfully



The "Charge Entry: Complete" screen displays a progress bar at the top right indicating 80% completion. It contains the following text: "Your charges were entered successfully." and "What would you like to do next?". Below this text are five options, each with a green arrow icon and a "Go" button: "Enter another charge with same Participant - same Provider", "Enter another charge with same Participant - different Provider", "Enter another charge with same Provider - different Participant", "Enter another charge with new Participant and Provider", and "Done entering charges". The "Done entering charges" option has a "Done" button instead of a "Go" button.

Go to Workflow queue, answer the questions, and click “Save” in bottom right corner

The screenshot shows a web application window titled "Workflow - Internet Explorer". The interface is divided into several sections:

- Queues**: A header section.
- Item Details**: A table with properties and values.

Property	Value
job_id	1033550
flow_name	MV_TIME_PRO
step_desc	TIME_ENTR
department	TIMESHEETS
account	3057
- Tasks**: A table with columns: Done, Type, Description, and Req'd.

Done	Type	Description	Req'd
<input type="checkbox"/>	Standard	Enter timesheet	No
<input type="checkbox"/>	Key Query	What is the document status?	Yes
<input type="checkbox"/>	Key Query	RTP Reason	No
<input type="checkbox"/>	Key Query	CRN#	No
<input type="checkbox"/>	URL	Open Image	No
- Task Processing**: A section for processing the task "What is the document status?". It includes a text input field with "Entered" and an "OK" button.

At the bottom right, there are buttons for "Save", "Return Job", and "Set Locks".

Accessing CRM

Creating Research Issues

Description/Purpose

When the Data Entry team receives a document that needs research due to an issue or error message that has occurred while keying (i.e.: employee/vendor has unprocessed form, missing relationship status, etc.) a research issue is created. Until the issue has been resolved by a liaison the document cannot be processed for payment.

Software Access Required

- FOCO**Online** (<https://nm.focosonline.com/nm/>)
- Microsoft Dynamics CRM

Steps

MS Dynamics/CRM

Set to: Contact and Services

Search by: Social Security Number

Select Cases:

- Click “Add New Case” (participant/member will be pull into system)

Source: Inbound Fax/Scan

Category: a) MV Research Issues

Subject: Select category from drop down

- Click “SAVE”

Assignment Information: Change owner to Mi Via Liaisons

Click “OK”

Notes and Attachments: Add a New Note

- Participant/Member:
- Employee or Vendor:
- Service Codes:
- Dates of service:
- Requested:
- Entered:
- Corrections needed:
- Centennial Care or Mi Via:
- Doc ID:

Click "SAVE"

Close all screens from Microsoft Dynamics

Creating an RTP

Description/Purpose

When the Data Entry team receives a document that needs research due to an issue or error message that has occurred while keying (i.e.: employee/vendor has unprocessed form, missing relationship status, etc.) a research issue is created. Until the issue has been resolved by a liaison the document cannot be processed for payment.

Software Access Required

- FOCo***online*** (<https://nm.focosonline.com/nm/>)
- Microsoft Dynamics CRM

Steps

Create a Reference Number in CRM

Owner: Data Entry

- Data Entry will identify obvious errors to RTP and attach the document to the CRN.
 - The liaisons will research if any errors were not identified by Data Entry and the paperwork is for the correct participant/member.
 - The liaisons will notify Data Entry of other issues identified or are able to process the paperwork sent for RTP and update the CRN.
 - If the RTP is able to be processed, Data Entry will pull the document from Workflow and process.
- Search by: Participant Social Security Number
 - Select Cases:
 - Click on Add New Case (participant will pull into system)
 - Source: Inbound Fax/Scan
 - Category: MV RTP/MV Educational RTP
 - Subject: Select Subject from drop down
- Click "SAVE"
- Assignment Information: **Change owner to MV Liaison** so they will make one outbound call attempt
- Click "OK"
- Notes: Add a New Note
 - Participant/Member: PARTICIPANT NAME (First initial, last name only)
 - Employee or Vendor: EE OR VENDOR NAME
 - Service Codes:
 - Dates of service: Ex: 01/01/2014-01/15/2014 or the PRF Date

- Requested:
- Entered:
- Corrections needed: Please submit PRF, Timesheet or Miles payment with the following correction; For example
Missing signatures of the Employee of Record
- Centennial Care or Mi Via:
- Doc ID: xxxxxxxx
- Save & close CRN
- In Workflow, fill out the required fields (Status, RTP Reason, CRN#)
- Click "Save"

Note: FOCoS^{online} "Internal Comments" must have the CRN # if this is a partial payment

Close all screens from Microsoft Dynamics

Things to consider:

- We received a payment request and it is faint. You are 100% sure you can key it; we do not require another payment request to be faxed in.
- We received a Payment request and the time stamp is covering the signature partially due to our fax machine. We do not require another payment request fax in. We would key it.
- 2 pay periods on the 1 timesheet. We key in the 1st pay period and RTP the remaining. .
- Service codes on PRF's, timesheets or miles: If the service codes are listed as partial. We key it in and send an Educational only once. If they sent it in the 2nd time with partial service codes, we RTP and don't key it in.
- Do not enter a PRF, Timesheet or Mileage if there are no service codes on the form. Create an RTP, even if the plan only includes one service code.
- Signature dates. If we have EOR/Part signed it on 04/01/14 and EE signed it on 05/01/14 and the last day of worked is 5/01/14. We would RTP it out and we don't key it. Both signature dates need to be on or after the dates of service. The EOR signature dates must acknowledge the approval of the TS. If they faxed it in before their shift is completed, we will not key anything.
- All invoices must include the company name.
- If we receive a receipt dated more than 1 year, the PRF can be entered. There is no time limit.