# Pre-ETS Vendor Portal Cheat Sheet

1. **Home Page**
   a. Click on the desired function:
      - Search Consumers
      - Intake
      - Services
      - Reports
      - Administrative Menu
        - Transfer Case (available to Agency Leads and Contract Leads)
        - Manage Users (available to Agency Leads and Contract Leads)
        - Manage Case Assignments to additional Contractors/Agencies (available to Contract Leads)
        - Change Consumer Case Status (available to Agency Leads and Contract Leads)
        - Statewide Consumer Search (available to SOI VR Pre-ETS Consultants)
        - Manage Schools (available to Contract Leads)
      - Fiscal Menu
        - Generate Invoice (available to Agency Leads and Contract Leads)
2. **Consumer Search**
   - Enter search criteria to find an existing consumer. This can be one, none or a combination of several search fields. *Hint: The less search criteria that is used, the more results you will receive. Entering additional search criteria will narrow your results.*
   - If you cannot find the consumer you are seeking, click on the Create New Intake button to enter the consumer's Intake information.
   - Double click on a selected record to Add/Modify Service.
   - Documents are case-specific. To get to a case's documents, select the case and click View/Upload Documents.
   - To export all records from a Consumer Search to an excel file, after search is complete click the Export to Excel button. The file will

appear for viewing and/or to save in lower left corner. Click to open and save if desired.

- For Contract Leads, if multiple agencies within a contract are assigned to a ‘shared consumer’, consumers will be listed more than once, with the secondary assignments shown in parantheses next to the Assigned Consultant name.

3. **Intake**
    - Enter all required fields and click Save.
        - If errors occur, they will be displayed on the screen. Correct the errors in order to Save the Intake record.
        - You will be unable to enter Services until you successfully save the consumer’s Intake record.
4. **Services**
    - Services Search –
        - Enter search criteria to find an existing service session. This can be one, none or a combination of several search fields. *Hint: The less search criteria that is used, the more results you will receive. Entering additional search criteria will narrow your results.*
        - If you cannot find the service session you are seeking, click on the Create New Service button to enter service session information.
            - The same function can be used for Individual consumer service sessions or Group consumer service sessions.
            - A service is reported with actual information *after* it has been provided (planned services with future service dates are not allowed).
            - Only one contractor/agency can be represented per service session report.
            - Add all of the Services provided in the Session and all of the Consumer(s) that attended, and click Save.
    - Add Services -

    - Click on the Add Services button. Select all of the service categories that were provided during the session by checking the appropriate checkboxes.
    - Click OK.
    - Enter the time spent in minutes and a description of the activities per service category. Optionally, the start and end time for the (entire) session can also be entered.
    - For group sessions, it is not necessary to enter a separate activity note for each consumer. Enter the activity once, and in the single activity note enter the 'generic' info once that applies to all consumers, and afterwards in the same note list the individual consumers' information.
- Add Consumer –
    - Click on the Add Consumer button.
    - Search for the consumers and select all that attended the session by checking the appropriate checkboxes.
    - Click OK.
    - Note: Consumers cannot be selected for their first service entry unless both of the pre-requisite documentation types have been uploaded: Disability Documentation and Intake Rubric (Pre-Test).

5. **<u>Documents</u>**
    - The documents grid will display documents already uploaded for the consumer selected from Consumer Search.
    - Select desired document and click either:
        - Modify (to Modify Document Type, Document Name or Comment) –or-
        - Delete (to remove the document) –or-
        - View to download/open the document.
        - For 'shared consumers', primary and secondary assigned agencies will only be able to Modify and Delete their own uploaded documents, although all of the shared consumer's documents will be available to View.
    - To upload a new document, click the Upload New Documents button.

- Select the Document Type.
- Enter a Document Name (this will be displayed in the grid and should be something useful to help you identify the document). For Example: for a Document Type of Disability Documentation, you might use IEP, 504 or Other Disability Documentation in this field.
- Enter a Comment if desired(this will be displayed in the grid and should be something useful to help you identify this particular document at a later time, particularly if there might be more than one of the same document type). For Example, for a Document Type of Disability Documentation, and a Document Name of Other Disability Documentation, you might use Dr. Smith Diagnostic Evaluation.
- Click Browse to navigate to the folder and document to upload.
  - Select and double click on the document or select and click Open.
  - Maximum size of 6MB will be enforced. If document is larger than 6MB an error will display and Upload button will be disabled.
- Click Upload.
  - If Malware/virus is detected, the upload will fail with an appropriate message.

6. **Administrative Menu**

- **Transfer Case** – This function is used to transfer case(s) from one Pre-ETS consultant to another. This can be done across agencies within a contract group.
  - Agency Leads and Contract Leads have access to this function.
  - Search for the desired consumer case(s) using one or more of the available search criteria.
  - Select the desired case(s) by checking the appropriate checkboxes. One, several or all case(s) in the list can be selected.

- Select the desired 'Transfer to' Pre-ETS Consultant to whom the case(s) will be transferred.
- Click Transfer.
- Shared consumers within a contract will be listed more than once, with the secondary assignments shown in parantheses next to the Assigned Consultant name.
- **For**

- **Manage Users –** This function is used to add or inactivate system users or change their role.
  - Agency Leads and Contract Leads have access to this function.
  - The grid results will list the existing users. There are three functions available:
  - Inactivate User – This allows users to inactivate an existing user.
    - Agency Leads can inactivate any user in their agency, except themselves. Contract Leads can inactivate any user in their contract, except themselves.
    - When inactivating a user with multiple roles due to multiple contracts or special access to another agency within a contract, the system will prompt to determine if all roles should be inactivated or just the selected contract/agency/role type.
    - Search for the desired user, using one or more of the available search criteria. Select the desired User to Inactivate. Click Inactivate.
  - Add New User – this function is used to register a new user under your Contractor (and/or Agency).
    - Enter all required fields, and select the appropriate User Role. Click Save or Save and Close.
    - An email will be sent confirming the registration. New registrants for Contractors will receive a Microsoft Invitation email to complete their Azure registration. Registrants for SOI VR will not need to register in Azure and will not receive a Microsoft Invitation email.

        - *Note: If a new user needs to be registered under more than one Contractor, please email [Fssa.Pre-Ets@fssa.IN.gov](mailto:Fssa.Pre-Ets@fssa.IN.gov) for assistance.*
    - Change Role – this function is used to change a user's role (to Contract Lead, Agency Lead, or Pre-ETS Consultant).
        - Change the selection to the new desired user role, and click Save or Save and Close.
- **<u>Change Consumer Case(s) Status</u>** – This function is used to inactivate or reactivate a consumer's case.
    - Pre-ETS Consultants, Agency Leads and Contract Leads have access to this function, but only for cases to which they have access.
    - Inactivate Case:
        - This function is to be used to denote that Pre-Employment Transition Services have ended for the consumer. [This function should not be used if a consumer is only transferring to another provider due to moving, etc.)
        - Search for the desired consumer case(s), using one or more of the available search criteria.
        - Select the desired consumer case(s) by checking the checkbox in leftmost column.
        - Enter the required End Date (which denotes end of services date) and Inactivation Reason.
            a. If All Other Reasons is selected for the Inactivation Reason, a Please Specify Other Inactivation Reasons field will be required. Enter Comment if desired.
        - More than one consumer case can be selected at a time. For example, at high school graduation time several consumer cases could be closed at the same time with the same End Date, and Inactivation Reason of Graduated from High School. The End Date, Inactivation

Reason (and Comment if entered) would be the same for all selected consumer cases.

a. Care should be taken when closing multiple cases at the same time. In the example above, some students although they receive a certificate of completion opt to stay in school for another year. Those students, if under 23, are still eligible for Pre-ETS if desired and their case would not be inactivated along with other high school graduates.

- Reactivate Case:
  - When an inactive case is selected, Reactivation Comments and the Activate button will be enabled.
  - Comments are optional. Click the Activate button to Reactivate the case.

- **State-Wide Consumer Search** – This function is to be used by VR Staff only. It allows SOI VR Pre-ETS Consultants to 'look up' cases to see if they are already in the system/assigned to a Contractor.
- **Manage Schools** - This function is to be used to add a school, assign a school to your Contractor, or edit existing information on a school.
  - Contract Leads have access to this function, but only for their Contractor.
  - Grid results default to list the schools for the specified Contractor.
  - Four functions are available:
    - Add School – this function allows the user to add a school which by default will be assigned to the user's Contractor.

      a. If uncertain of the school code or exact name of the school, this screen includes a link to the State of Indiana DOE site. On that site (listed under Popular Pages), is a link for the School Directory which is an Excel list. There are two relevant worksheets that might contain the school you wish to add: PUBLIC and NONPUBLIC. You can use Find to search for your school in the appropriate worksheet.

b. Enter the correct school code, school name, and county per the DOE list. Using cut and paste (Ctl+C and Ctl+V) from the excel sheet to the screen for school code and school name fields will help to ensure that the fields are entered correctly.

c. If you cannot find your school in the list, check the checkbox "School Code Not Available" and the system will assign a unique school code that is not already in use.

- Edit – this function allows the user to change an entry (for example, correct the school name spelling).
- Assign – this function allows the user to simply assign a school that already exists in Pre-ETS to their Contractor. *Please use care that you only assign schools that are in counties served by your contractor at which your Contractor will serve Pre-ETS consumers.*
- Export to Excel – this function will export the grid results to an excel worksheet. Note: This will include all grid results, so you may wish to filter or modify the worksheet to include only your Contractor's schools.

**7. <u>Reports</u>** – This menu will list the available reports.

- **<u>Demographic Report</u>** – This report is used to provide info that is sometimes needed to prepare counts/statistical reporting by agency/contract. This report can be exported to excel if desired and is available to Contract Leads and Agency Leads. Caution should be used with exported data, as it does contain PII and PHI.
  - When run by Contract Leads at the contract level, if there are 'shared consumers' within a contract, the consumer will be listed multiple times.

  - Start and End Date selections includes cases active during the date range. Cases with Intake date after the End Date or Closure (exit) Date prior to the Start Date will not be included. When no dates are specified, all cases will be included for the selected Contractor/Agency/Pre-ETS Consultant.

- **Demographic History Report** - This report is used to provide same info as the Demographic report, but will also include cases that were previously served, even if the case has been transferred to another Contractor/Agency.
- **Document History** – This report will include a list of all undeleted documents uploaded by the Contractor/Agency for all clients served, even if the client case has been transferred to another Contractor/Agency.
  - This differs from the Document screen which lists documents only for a specific client case.
  - View is the only function available (modify and delete are not available from this report).
- **Possible Duplicate Consumer Report** – This report is used to list duplicate consumers based on an exact match of first name, last name, DOB, and gender as well as possible duplicate consumers that match on last name, DOB, gender and only the first two characters of the first name. This report can be exported to excel if desired and is available to all users.
- **Service Activity Notes -** This report is used to provide a list of the services with the full service notes included. This report can be exported to excel if desired and is available to all users.
- **Service Session Details for Monthly Billing** – This report is used to list Service Categories with Time Spent/Rate/Total Monetary Amount within Service Session, within Contractor for the selected month. Agency and Service Consultant (consultant that provided the services) are also listed.
  - This report can be exported to excel for sorting as desired and is designed to assist with billing reconciliation. It is available to Contract Leads, Agency Leads, and VR Administrative Staff. It is

also available to Pre-ETS Consultants, but they will only be able to view their own services.

- **Service Session Details by Consumer** – This report is used to list Services by Consumer and is available to Contractor Leads, Agency Leads and VR Pre-ETS Consultants. The report provides subtotals by consumer and grand totals for all consumers included in the report. This report can be exported to excel if desired and is available to all users.

8. **Fiscal** – This menu provides the Generate Invoice function.
    - **Generate Invoice** – This function is used to provide a preview of a generated invoice, and/or to generate and submit an invoice within the Vendor Portal system.
        - Only un-invoiced/unpaid service sessions will be included in the specified date range.
        - This function does not automatically submit an invoice or replace the claim form to be submitted to the State for payment. However, it does provide the values for the line items to be submitted on the State claim form.
        - Values can be copied/pasted from the invoice to the claim form.
        - By generating/submitting an invoice, service sessions included in the date range will be marked Invoiced and cannot be included in future invoices.
        - The invoice is an aggregate of the Service Sessions Details for Monthly Billing report, provided in the format of the State Claim form.