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Introduction

The Division of Disability and Rehabilitation Services, Bureau of Rehabilitation Services has contracted with Public Consulting Group (PCG) to implement an electronic Claim Payment System (CPS) for Vocational Rehabilitation (VR) service vendors for the submission of invoices and payment of claims.

- All VR Vendors, Participants, Guardians, individuals, and VR Staff must enter claims of an authorization no later than 90 days of the claim end date.
- All claims submitted are reviewed by VR State Staff.
- Only authorized State Users can delete or remove a claim created by another User.

Note on screenshots

The screenshots used in this User guide may depict features and functions that vary depending on the User’s role.

Dashboards

The VR-CPS Dashboard is based on the User type. All State Users have the same dashboard where they can see authorizations. The Vendor Users’ dashboard displays authorizations and claims broken down by the status.

- Vendors can only see information for participants they are authorized to serve; this includes authorizations and claims.
- Each section of the dashboard displays up to the latest 100 records within the last 90 days.

The dashboard also provides each User group to view the progress of the Vendor registration and claiming processes, including statuses and hyperlinks to other forms.

Vendor Dashboard

The Vendor Dashboard displays authorizations and claims broken down by the status.

Business Scenario

Step / Action

1. Vendors navigation: Select/Click **Home** at any time to access the dashboard (shown below).
The **Authorizations** section shown below the vendor’s authorizations. Clicking on an *authorization number* takes the User to the Authorization Information form (screen).

<table>
<thead>
<tr>
<th>Authorization ID</th>
<th>Auth. Date</th>
<th>Part. First Name</th>
<th>Part. Last Name</th>
<th>Remaining Funds</th>
<th>Current Auth. Amt.</th>
<th>Last Update Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>10001</td>
<td>04/01/2019</td>
<td>Tonya</td>
<td>Jones</td>
<td>$6,700.00</td>
<td>$6,700.00</td>
<td>04/01/2019</td>
</tr>
</tbody>
</table>

The **Claims Not Approved** section shown below, the most recent 100 claims in a not approved status.

<table>
<thead>
<tr>
<th>Claim ID</th>
<th>Invoice ID</th>
<th>Authorization ID</th>
<th>Claim Date</th>
<th>Claim Amount</th>
<th>Days <em>Not Approved</em></th>
<th>Part. First Name</th>
<th>Part. Last Name</th>
<th>Counselor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10005-1</td>
<td>1234</td>
<td>10005</td>
<td>04/01/2019</td>
<td>$840.00</td>
<td>0.54</td>
<td>Aaron</td>
<td>Sours</td>
<td>Jennett, Shelby</td>
</tr>
</tbody>
</table>

The **Claims in Draft** section shown below displays claims being worked on but not yet submitted.

<table>
<thead>
<tr>
<th>Claim ID</th>
<th>Invoice ID</th>
<th>Authorization ID</th>
<th>Claim Date</th>
<th>Claim Amount</th>
<th>Part. First Name</th>
<th>Part. Last Name</th>
<th>Counselor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10005-2</td>
<td>10005</td>
<td>05/02/2019</td>
<td>$0.00</td>
<td></td>
<td>Aaron</td>
<td>Sours</td>
<td>Jennett, Shelby</td>
</tr>
</tbody>
</table>

The **Claims Approved** section shown below displays approved claims.

<table>
<thead>
<tr>
<th>Claim ID</th>
<th>Invoice ID</th>
<th>Authorization ID</th>
<th>Claim Date</th>
<th>Claim Amount</th>
<th>Part. First Name</th>
<th>Part. Last Name</th>
<th>Counselor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10009-1</td>
<td>10003</td>
<td>04/01/2019</td>
<td>$2,000.00</td>
<td></td>
<td>Wai</td>
<td>Saiio</td>
<td>Dean, Charles</td>
</tr>
</tbody>
</table>

The **Claims Submitted** section shown below, claims submitted to the State for review and approval.

<table>
<thead>
<tr>
<th>Claim ID</th>
<th>Invoice ID</th>
<th>Authorization ID</th>
<th>Claim Date</th>
<th>Claim Amount</th>
<th>Part. First Name</th>
<th>Part. Last Name</th>
<th>Counselor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10005-1</td>
<td>1234</td>
<td>10005</td>
<td>04/01/2019</td>
<td>$840.00</td>
<td>Aaron</td>
<td>Sours</td>
<td>Jennett, Shelby</td>
</tr>
<tr>
<td>10001-1</td>
<td>12345</td>
<td>10001</td>
<td>04/01/2019</td>
<td>$1,760.00</td>
<td>Tonya</td>
<td>Jones</td>
<td>Jennett, Shelby</td>
</tr>
<tr>
<td>10001-2</td>
<td>10001</td>
<td>04/01/2019</td>
<td>$540.00</td>
<td></td>
<td>Tonya</td>
<td>Jones</td>
<td>Jennett, Shelby</td>
</tr>
<tr>
<td>10004-1</td>
<td>10004</td>
<td>04/01/2019</td>
<td>$840.00</td>
<td></td>
<td>Sha</td>
<td>Cheng</td>
<td>Jennett, Shelby</td>
</tr>
</tbody>
</table>

The **Claims Paid** section displays the most recent 100 claims paid.

<table>
<thead>
<tr>
<th>Claim ID</th>
<th>Invoice ID</th>
<th>Authorization ID</th>
<th>Claim Date</th>
<th>Paid Amount</th>
<th>Paid Date</th>
<th>Part. First Name</th>
<th>Part. Last Name</th>
<th>Counselor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10003-1</td>
<td>10003</td>
<td>04/01/2019</td>
<td>$2,000.00</td>
<td>05/05/2019</td>
<td>Wai</td>
<td>Saiio</td>
<td>Dean, Charles</td>
<td></td>
</tr>
</tbody>
</table>
State Dashboard

The State Dashboard offers a comprehensive view of pended and finalized claims through the Indiana Vocational Rehabilitation (VR) Claim Payment System (CPS) web portal. State Users can view Vendor Registration, Authorizations, and Claims in a pended or finalized status.

Business Scenario

Step / Action

1. To access the State Dashboard while logged in as a State User, Select/Click Home from any screen.

   The Vendor Registration section shown below displays vendor registration requests that are not approved or are pending.

   The Authorizations section shown below displays the most recent 100 authorizations.
The **Claims** section shown below displays the most recent 100 claims submitted, not approved, approved, or paid status.

<table>
<thead>
<tr>
<th>Claim ID</th>
<th>Authorization ID</th>
<th>Claim Date</th>
<th>Remaining Funds on Auth.</th>
<th>Addit. Inv.</th>
<th>Days 'Not Approved'</th>
<th>Client ID</th>
<th>Part. First Name</th>
<th>Part. Last Name</th>
<th>Vendor First Name</th>
<th>Vendor Last Name</th>
<th>Counselor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10001-2</td>
<td>10003</td>
<td>04/01/2019</td>
<td>$1,195.00</td>
<td>1</td>
<td>1002</td>
<td>Wei</td>
<td>Sato</td>
<td>MOA</td>
<td>Cox</td>
<td>Davis</td>
<td>Charles</td>
</tr>
<tr>
<td>10001-1</td>
<td>10003</td>
<td>04/01/2019</td>
<td>$1,195.00</td>
<td>0</td>
<td>1002</td>
<td>Wei</td>
<td>Sato</td>
<td>MOA</td>
<td>Cox</td>
<td>Davis</td>
<td>Charles</td>
</tr>
<tr>
<td>10005-1</td>
<td>10005</td>
<td>04/01/2019</td>
<td>$5,500.00</td>
<td>1</td>
<td>1004</td>
<td>Aaron</td>
<td>Sears</td>
<td>MOA</td>
<td>Cox</td>
<td>Jennett</td>
<td>Shelby</td>
</tr>
<tr>
<td>18529414.16</td>
<td>18529414</td>
<td>06/04/2017</td>
<td>($915.39)</td>
<td>97</td>
<td>TES12345</td>
<td>Tyler</td>
<td>Duran</td>
<td>Vanessa</td>
<td>Charles</td>
<td>Jennett</td>
<td>Shelby</td>
</tr>
<tr>
<td>170072-5</td>
<td>170072</td>
<td>03/10/2019</td>
<td>$744.00</td>
<td>0</td>
<td>169</td>
<td>Ryan</td>
<td>Abell</td>
<td>Vanessa</td>
<td>Charles</td>
<td>Jennett</td>
<td>Shelby</td>
</tr>
</tbody>
</table>

**How to View an Authorization**

**Step / Action**

1. **Select/Click Claiming.**

2. **Select/Click on Authorization Search.**
3. Users can enter information in the **Auth Number**, **Vendor/Address ID**, **Authorization Created Date**, **Participant/Client ID**, **Service Begin Date**, **Service End Date**, **Service Type**, and **Remaining Funds** fields.

4. Next, click **Search**.

   *Service “Begin Date” and “End Date” must be within the authorization start and end date range.*

   *Authorization Search: The Vendor name always take precedence when selecting Vendor/Address Field. The address will populate when the User has a minimum of two words.*

   The Authorization spreadsheet/grid shown below, displays the User’s results.
5. Click on the **Auth Number** hyperlink (shown below).

The **Authorization Information** form (screen) appears displaying detail information on the authorization claim (shown in the next section).
Authorization Information

The Authorization Information form (screen) allows Vendors to view the services/goods they are authorized to provide for a particular participant.

At a high level, the Authorization Information includes:

- Vendor Information
- Participant Information
- Authorization Information
- Authorized Services & Goods
- Authorized Dates, Rates, and Quantity
- State Approvals & Contact Information
- Other Information

Export Functionality

The VR-CPS has a feature that "exports" data shown in the spreadsheet/grid section (if applicable).

Step / Action

1. To create a copy of the authorization in PDF format (shown above), click the Export button.
How to Enter a Claim

Users can add a claim to an authorization using one of two methods, described below.

- Users can add multiple claims for authorization, but a claim can only belong to one authorization.
- Claims can be added to an authorization until funds are expended or remaining funds equal zero (0).

Method 1

Step / Action
1. From the Authorization Search form (screen), select/click Add Claim hyperlink for the correct Auth Number line.

Method 2

Step / Action
1. From the Authorization Information form (screen), click the Add Claim button (shown below).
Using either method (mentioned above) shows the Claim Information form (screen). Shown below (unsaved claim), the claim is **not** saved. The claim is saved once a **Claim Number** is populated and the Claim Status is set to “Draft.”
Adding Line Items to a Claim

Business Scenario

From the Claim Information form (screen), Users can add authorization line items to the claim (shown below).

Step / Action

1. Click Add To Claim listed in the correct Authorization Item Line #.

2. Enter Claim Begin Date and Claim End Date.
   - Note the Claim Begin and End Date must be within the authorized service dates unless the claim is for tuition or related fees.

3. Users can also enter the Total Invoice Amount for vendor-specific data. This amount will not be calculated to the Service/Product Amount on the claim unless exceptions apply with CPT Codes (explained in later sections of this document).
   - Note, use the Total Invoice Amount field if Vendors would like to track their bill rates for the particular service/product provided.
4. Users can also add **Claim Item Notes** (shown below).
   - **Note**, if a User enters multiple claims that overlap in service dates (claim begin and end date), an explanation is required in this field.

![Claim Item Notes Example](image)

Once a User clicks the **Save Changes** button, the Claim Item section populates.
   - **Note**, Users are alerted if there are any errors/messages for the claim item (shown below).

![Claim Item Details Example](image)
Once the claim item passes the system's fiscal validation rules, the Claim Items section populates. At this point, the claim automatically is saved, and the claim status and claim number populate (shown below).

The **Edit Claim Item grid is not populated until a User “edits” an existing claim item, or adds another authorization item to the claim.**

![Claim Information](image)

<table>
<thead>
<tr>
<th>Authorization Items</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Description</td>
</tr>
<tr>
<td>4/1/2019 - 6/30/2019</td>
<td>Dental Services</td>
</tr>
<tr>
<td>4/1/2019 - 6/30/2019</td>
<td>Behavioral Counseling</td>
</tr>
<tr>
<td>4/1/2019 - 6/30/2019</td>
<td>Orthopedic Shoes and Supports</td>
</tr>
<tr>
<td>4/1/2019 - 6/30/2019</td>
<td>Work Experience Development</td>
</tr>
<tr>
<td>4/1/2019 - 6/30/2019</td>
<td>Voc Rehab</td>
</tr>
<tr>
<td>4/1/2019 - 6/30/2019</td>
<td>1031 Job Development &amp; Assessment (5 weeks)</td>
</tr>
</tbody>
</table>

![Claim Items](image)

**Edit Claim Item**

- **Edit Claim Item**
  - **Claim Begin Date**: 4/1/2019
  - **Claim End Date**: 5/31/2019
  - **Rate**: 40.00
  - **Service/Product Amount**: $2,530.00
  - **CPT Codes**: 1099 Exempt

- **Supporting Documentation**
  - **No supporting documents found.**
  - **Add Files**: CPT, Spreadsheet, Word
  - **Choose File**: No file chosen
  - **Upload**: Click to upload files.
Adding Multiple Claim Items to the Same Claim

Business Scenario

Users can continue selecting/clicking authorization line items to add to a claim. Follow the same process outlined above to complete this.

Step / Action

1. Continue selecting Add to Claim hyperlink(s), until all claim items are added to a claim.
2. Click the Save Changes button beneath the Edit Claim item grid.

The “Invoice Number” field is Vendor specific data that the User can enter for identifying purposes.

At this point, a Claim is saved in CPS and not submitted to the case management system.

Adding claim items and clicking “Save Changes” does not submit a claim for state review.
Adding CPT Codes to a Claim Item

Users can add an unlimited number of CPT codes to a claim item.

Business Scenario

Step / Action

1. Click the Add/Edit CPT Codes button (shown below).

In both methods (mentioned above), the Claim Items – CPT Codes form (screen) displays (shown below).
Typing the CPT code in the “CPT Search” field, a list of the most current CPT codes and rates appear (shown below).

Users can also select the CPT code from the pre-populated list (shown below).
At this point, the CPT code is not added to the Claim Item. Users must click the “Add” button (shown below). Once added, the CPT code information displays under Current CPT Codes (Linked to claim items).

### Removing a CPT code

**Business Scenario**

Users can **remove** an added CPT code by clicking the **Remove** hyperlink in the grid on the Claim Item – CPT Codes form (screen).

**Saving a CPT code**

**Step / Action**

1. To save the CPT code to the Claim Item, click the **Save** button. The following message displays (shown below).
If a User adds a CPT code that has a rate of zero (0), the “Invoice Amount” field is mandatory.

Returning to Claim Information

Step / Action
1. Click the Return button, to go back to the Claim Information form/screen (shown below).

Removing a Claim Item

Business Scenario

Step / Action
1. From the Claim Information form (screen), select the appropriate Auth Line number and click the Remove hyperlink.

The Claim Items form (screen) displays and the claim is no longer listed (shown below).
The claim item is no longer listed.
Adding Additional Information to a Claim

The following section describes fields Users can add to the claim. Keep in mind these fields are added to the claim, not the claim item.

Business Scenario

Step / Action

1. Users can add Claim Notes for the entire claim.

2. Users can indicate if there are additional invoices for the authorization. An additional Invoice is optional. Selecting from the drop-down list are as follows:
   - **No**: Remaining funds of the authorization selected are canceled.
   - **Yes**: Remaining funds are NOT canceled.

   If a User indicates “No” for the "Additional invoices" selection, the following message then displays (shown below).

   ![Message](image-url)
How to Attach a Supporting Document

Step / Action

1. Click the drop-down (valid files: image, PDF, Spreadsheet, Word) and select the appropriate document type from the list.

2. Next, click the **Choose File** button (shown below) and using the popup dialog (“Choose file to upload”), select the appropriate document. To confirm file selection, click the **Open** button on the dialog.

3. Enter a file name in the text field and click **Upload** (shown below).
Listed is the Supporting Documentation group, the document is uploaded successfully (shown below).

4. Once all Additional Information is added to a claim, Users must click the Save button (shown below).

This information will not automatically save when saving a claim item.
How to Search for a Claim

Business Scenario

Step / Action
1. From the navigation bar, select/click **Claiming** (shown below).

![Claiming Navigation Bar](image1)

2. From the drop-down menu, select/click **Claim Search** (shown below).

![Claim Search Dropdown](image2)

3. Select a Participant from the results menu as you type, or, enter multiple search criteria in the text fields.

![Claim Search Form](image3)
4. Enter information in the following fields:
   - Auth Number
   - Participant/Client ID
   - Service Begin Date
   - Service End Date
   - Invoice Number
   - Claim Number
   - Claim Created Date

5. Click the **Search** button (shown below).

6. Click a **Claim Number** hyperlink to view (shown below).
The Claim Information screen displays (shown below).
## Claim Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>User Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Claim has been started and saved, but not submitted for State review.</td>
<td>The claim can be edited (see roles in Appendix II).</td>
</tr>
<tr>
<td>Submitted</td>
<td>Claim has been submitted for State review.</td>
<td>The claim cannot be edited.</td>
</tr>
<tr>
<td>Not Approved</td>
<td>The Claim has been reviewed by State staff and the claim needs to be revised and resubmitted for State review. If this occurs, Users will be able to see the Not Approved Reason &amp; Notes to assist in claim modification.</td>
<td>The claim can be edited (see roles in Appendix II).</td>
</tr>
<tr>
<td>Not Approved – Removed</td>
<td>The Claim has been reviewed by State staff and the claim needed to be revised. The claim has subsequently been removed.</td>
<td>The claim cannot be edited.</td>
</tr>
<tr>
<td>Approved</td>
<td>The Claim has been reviewed by State staff and the claim is approved for payment.</td>
<td>The claim cannot be edited.</td>
</tr>
<tr>
<td>Paid</td>
<td>The Claim has been paid.</td>
<td>The claim cannot be edited.</td>
</tr>
</tbody>
</table>
Finding Information and Reporting

Participant Lookup

Business Scenario

Step / Action

1. From the navigation bar, select/click Claiming (shown below).

![Navigation Bar with Claiming Selected](image)

2. Select/click Participant Lookup from the drop-down menu (shown below).

![Participant Lookup in Drop-Down Menu](image)

3. Enter the information in the following fields:
   - Participant First Name
   - Participant Last Name
   - Client ID
   - Authorization Number
   - Participant Phone Number
   - Participant DOB
   - Claim Number
   - Invoice Number
4. Next, click the **Search** button (shown below).

The Participant data displays (show below).
Accessing Participant Details (Multi-tabbed)

Step / Action

1. Click the **Details hyperlink** of a participant (shown below).

![Participant Lookup](image1)

The complete data for the selected participant displays (shown below).

![Details for Participant](image2)

Use the tabs to view particular details for the participant, including Participant Info, Authorizations, and Claims.

**Participant Info Tab**
Authorizations Tab

The “Authorization #” is a hyperlink to the Authorization Information form (screen).

Claims Tab

The “Claim Number” is a hyperlink to the Claim Information form (screen) and the “Billing History” hyperlink will navigate Users to the Billing History form (screen).
Payments

View Checks

Business Scenario

Step / Action

1. From the navigation bar, select/click Payments, and select/click View Checks from the drop-down menu (shown below).

2. Next, enter a date range (example shown below).

3. Click the Filter button, and the data results display in a spreadsheet/grid (shown below).
**Viewing Payment Details**

**Step / Action**

1. Click the **View Payment Details** hyperlink on the row to see more information on a payment.

The data for the selected check displays a spreadsheet/grid (shown below).

![Payment Details Spreadsheet Image](image-url)
State Users Only: Finding Information and Reporting
Invoicing Details

Business Scenario

Step / Action

1. From the navigation bar, select/click Payments, and select/click Invoicing Details from the drop-down menu (shown below).

2. Enter a date range (example shown below).

3. Click the Run button.

The Invoicing Details data results in displays in a spreadsheet/grid (shown below).
Batch Checks

Business Scenario

Step / Action

1. From the navigation bar, select/click **Payments**, and select/click **Batch Checks** from the drop-down menu (shown below).

![Batch Checks Navigation Screenshot](image1.png)

   - **Step 1**

2. Select a **Batch** from the drop-down menu (shown below).

![Batch Selection Screenshot](image2.png)

   - **Step 2**

3. Click the **Run** button (shown below).

![Run Button Screenshot](image3.png)

   - **Step 3**

The Batch Checks data displays in a grid (shown below).

![Batch Checks Grid Screenshot](image4.png)

- **Step 3**
Reports
User Statistics

Business Scenario

Step / Action
1. From the navigation bar, select/click Reports, and select/click User Statistics from the drop-down menu (shown below).

The User statistic data displays (shown below).
Payments by Procedure Code

The Payments by Procedure Code report displays all payments made based on the search criteria. This report displays a single line per service code.

Business Scenario

Step / Action

1. From the navigation bar, select/click Reports, and select/click Payment by Procedure Code from the drop-down menu (shown below).

2. Enter the information in the following fields (shown below):
   - Select Region
   - Select Area
   - Select Caseload
   - Select Payment Start Date (00/00/0000)
   - Select Payment End Date (00/00/0000)

3. Click the View Report button.

The Payments by Procedure Code data displays (shown below).
Authorization Research

The Authorization Research report displays all authorizations based on the search criteria.

Business Scenario

Step / Action

1. From the navigation bar, select/click Reports, and select/click Authorization Research from the drop-down menu (shown below).

2. Click/Select the appropriate Select Service Type from the drop-down list (shown below).

3. Click the View Report button.

The Authorization Research data displays (shown below).

For Vendor Users, the “Search for FEIN” and “Search for Vendors” are prepopulated with the Vendor/EIN (Vendors cannot see anyone but themselves).
Claim Status

The Claim Status report displays claims that are in draft, not approved and submitted status (submitted and paid claims will not display). This report will display a single line per claim number.

**Business Scenario**

**Step / Action**

1. From the navigation bar, select/click Reports, and select/click Claim Status from the drop-down menu (shown below).

2. Enter the information in the following fields (shown below):
   - Select Region
   - Select Area
   - Select Caseload
   - Select Payment Start Date (00/00/0000)
   - Select Payment End Date (00/00/0000)

3. Click the View Report button.

The Claim Status data displays in a grid (shown below).
Outstanding Authorizations

The Outstanding Authorizations report displays all authorizations that have remaining funds available (the remaining fund's field does not equal zero (0)). This report will generate a single line per authorization line; for example, an authorization can display multiple times if the authorization has multiple authorization lines with remaining funds.

Business Scenario

Step / Action

1. From the navigation bar, select/click Reports, and select/click Outstanding Authorizations from the drop-down menu (shown below).

2. Select/Click the appropriate Select Area and Select Region from the drop-down list (shown below).

1. Click the View Report button.

The Outstanding Authorizations data displays in a grid (shown below).
Vendor Payments by Client and Claim Detail

The Vendor Payments by Client and Claim Details report displays all claims in a paid status. This report will display a single line per claim.

**Business Scenario**

**Step / Action**

1. From the navigation bar, select/click **Reports**, and select/click **Vendor Payments by Client And Claim Detail** from the drop-down menu (shown below).

2. Enter the information in the following fields (shown below):
   - Search for FEIN
   - Search for Vendor Name
   - Select Claim Service Start Date
   - Select Claim Service End Date
   - Select Fiscal Year

3. Click the **View Report** button.
The Vendor Payments by Client and Claim Detail displays in a grid (shown below).

For Vendor Users, the “Search for FEIN” and “Search for Vendors” are prepopulated with the Vendor/EIN (Vendors cannot see anyone but themselves).
Appendix A

A.1 Report Navigation Bar

All controls are visible in Microsoft Internet Explorer (IE), but not in Microsoft Edge, Chrome, or Firefox. Recommend Microsoft IE for full functionality.

The operational icon buttons numerically reference above are referenced in the table below.

<table>
<thead>
<tr>
<th>REF #</th>
<th>ACTION ICON BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>First Page</td>
<td>When clicked, jumps to the first page (Beginning). You must be viewing pages 2 for this function to be operative.</td>
</tr>
<tr>
<td>2</td>
<td>Previous Page</td>
<td>When clicked, goes back a page (must be viewing pages 2 and on).</td>
</tr>
<tr>
<td>3</td>
<td>Current Page and Page Total</td>
<td>Displays the current page. To manually choose a specific page, type in a number (e.g., viewing pages 1-10).</td>
</tr>
<tr>
<td>4</td>
<td>Next Page</td>
<td>When clicked, advances to the next page (must be viewing pages 2 and on).</td>
</tr>
<tr>
<td>5</td>
<td>Last Page</td>
<td>When clicked, jumps to the last page (End).</td>
</tr>
<tr>
<td>6</td>
<td>Zoom Value</td>
<td>To enter the page viewing, enter a percentage value or select the appropriate percentage from the popup menu. Actual Size displays the page at 100% magnification.</td>
</tr>
<tr>
<td>7</td>
<td>Report Search Textbox</td>
<td>To find a specific name or value (alphanumeric), enter it into this textbox.</td>
</tr>
<tr>
<td>8</td>
<td>Export (drop-down menu)</td>
<td>Click on the drop-down arrow and select the appropriate export file format from the menu shown below:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>9</td>
<td><strong>Refresh</strong> <img src="image" alt="icon" /></td>
<td>When clicked, the data results in the spreadsheet/grid are refreshed based on values changed in any search fields/textboxes (e.g., Using the Authorization Research form and altering the values listed in the &quot;Search For EIN&quot; field).</td>
</tr>
<tr>
<td>19</td>
<td><strong>Print</strong> <img src="image" alt="icon" /></td>
<td>When clicked, data shown in the spreadsheet/grid is printed using the browser’s default printer settings.</td>
</tr>
</tbody>
</table>
Appendix B

B.1 Roles Matrix

Permissions Key:
- R = Read Only Access
- U = Update Access
- N = No Access

<table>
<thead>
<tr>
<th>Role</th>
<th>Claiming Screens</th>
<th>Claiming Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Staff Search</td>
</tr>
<tr>
<td>State</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>StateReader</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>StateSuperUser</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>Vendors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SuperVendor</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>SubVendor</td>
<td>R</td>
<td>R</td>
</tr>
</tbody>
</table>

- State Super User can edit, delete or any claim.
- Other Users can only edit, delete, or remove claims entered by them only. Even the User with the same role cannot perform the above actions.
- State Read Only User can only view all the claims in read-only mode.
- Vendors of other organization cannot view information not related to their organization.
## Appendix C

### C.1 Acronym List

<table>
<thead>
<tr>
<th>Term</th>
<th>Description of Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>BR</td>
<td>Business Requirement</td>
</tr>
<tr>
<td>BRD</td>
<td>Business Requirement Document</td>
</tr>
<tr>
<td>CMS</td>
<td>Case Management System</td>
</tr>
<tr>
<td>CPS</td>
<td>Claim Payment System</td>
</tr>
<tr>
<td>CRP</td>
<td>Community Rehabilitation Provider</td>
</tr>
<tr>
<td>EFT</td>
<td>Electronic Fund Transfer</td>
</tr>
<tr>
<td>FEIN</td>
<td>Federal Employer Identification Number</td>
</tr>
<tr>
<td>FSSA</td>
<td>Family and Social Services Administration</td>
</tr>
<tr>
<td>ID</td>
<td>Identification</td>
</tr>
<tr>
<td>IOT</td>
<td>Indiana Office of Technology</td>
</tr>
<tr>
<td>IRIS</td>
<td>Indiana Information Rehab System</td>
</tr>
<tr>
<td>PCG</td>
<td>Public Consulting Group</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Document Format</td>
</tr>
<tr>
<td>RTM</td>
<td>Requirements Traceability Matrix</td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>TFS</td>
<td>Team Foundation Server</td>
</tr>
<tr>
<td>VR</td>
<td>Vocational Rehabilitation</td>
</tr>
</tbody>
</table>
## Appendix D

### D.1 Service Types Matrix

<table>
<thead>
<tr>
<th>Service Categories in CPS</th>
<th>Service Type</th>
<th>Service Sub Type</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assessment</strong></td>
<td>1. Licensed physicians</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Registered occupational therapists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Licensed psychologists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Licensed optometrists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Licensed podiatrists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. Licensed speech-language pathologists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7. Licensed audiologists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8. Licensed speech and hearing therapists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9. Licensed nurses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10. Licensed alcohol and drug addiction counselors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>11. Licensed clinical social workers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12. Licensed physician assistants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13) Other Assessment Services (specify)</td>
<td></td>
</tr>
<tr>
<td><strong>Diagnosis and Treatment</strong></td>
<td>1. Corrective surgery or therapeutic treatment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Mental health services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Dentistry</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Nursing services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Medications and supplies</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. Prosthetic, orthotic or other assistive devices</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7. Hearing Aids and Dispensers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8. Eyeglasses and visual services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9. Podiatry</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10. Physical therapy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>11. Occupational therapy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12. Speech or hearing therapy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13. Special services (i.e. transplantation, dialysis, etc.)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>14. Other Diagnostic and Treatment Services (specify)</td>
<td></td>
</tr>
<tr>
<td><strong>Training</strong></td>
<td>1. Post-Secondary Training/Education</td>
<td>2 a) Occupational Training</td>
</tr>
<tr>
<td></td>
<td>2. Technical Training</td>
<td>2b) Vocational Training</td>
</tr>
<tr>
<td></td>
<td>3. Disability-Related Skills Training</td>
<td>2c) Other Technical Training (specify)</td>
</tr>
<tr>
<td></td>
<td>4. Other Training (see sub-type)</td>
<td>3a) Orientation and Mobility Training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3b) Rehabilitation training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3c) Low vision aid training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3d) Braille training</td>
</tr>
</tbody>
</table>
| Rehabilitation Technology | 1. Rehabilitation Engineering Service  
2. Assistive Technology Devices  
3. Assistive Technology Services  
4. Home Modification Services  
5. Vehicle Modification Services  
6. Other Rehabilitation Technology (specify) |
|----------------------------|-----------------------------------------------------------------------------------|
| 3e) Speech reading training  
3f) Sign language training  
3g) Cognitive training/retraining  
3h) Other Disability Skills Training (specify)  
4a) On-the-Job Training  
4b) Apprenticeship Training  
4c) Remedial or Literacy Training  
4d) Other Training Not Covered (specify) |
| 1a) Mobility  
1b) Communications  
1c) Hearing  
1d) Low Vision/Blind  
1e) Cognition  
1f) Other Rehab Engineering Services (specify)  
2a) Off-the-Shelf Devices  
2b) Customized or Modified Devices  
3a) AT Evaluation Services  
3b) AT Purchasing/Leasing Services  
3c) Repair/Customize/Fit/Design AT Devices  
3d) Coordinating/Therapy/Interventions with AT  
3e) AT Training or Technical Assistance  
3f) Other AT Services (specify)  
4a) Home Modification Evaluation  
4b) Home Modification Contractor  
4c) Other Home Modification Services (specify)  
5a) Vehicle Modification Provider  
5b) Vehicle Modification Evaluation  
5c) Driver Training  
5d) Driver Evaluation  
5e) Other Vehicle Modification Services (specify) |
| Transportation Services | 1. Transportation Training  
2. Other Transportation Services (specify) |
| Personal Assistance Services | 1. Reader Services  
2. Personal Attendant Service  
3. 3) Other Personal Assistance Services (specify) |
| Technical Assistance Services | 1. Small Business Consultation  
2. Other Technical Assistance Services (specify)  
1a) Business plan development  
1b) Conduct market research  
1c) Other Small Business Services (specify) |
| Communication Access Services | 1. ASL Interpreter  
2. Certified Deaf Interpreter  
3. Tactile Interpreter  
1a) Nationally Certified  
1b) IIC  
1c) National Certified and IIC |
| 4. Oral Interpreter | 1d) Non-IIC  
| 5. Signing Exact English | 2a) Nationally Certified  
| 6. Video Remote Interpreting (VRI) | 2b) IIC  
| 7. C-PRINT | 2c) National Certified and IIC  
| 8. Remote CART | 2d) Non-IIC  
| 9. Live CART | 3a) Nationally Certified  
| 10. 10) Other Communication Access Services (specify) | 3b) IIC  
| | 3c) National Certified and IIC  
| | 3d) Non-IIC  
| | 4a) Nationally Certified  
| | 4b) IIC  
| | 4c) National Certified and IIC  
| | 4d) Non-IIC  
| | 5a) Nationally Certified  
| | 5b) IIC  
| | 5c) National Certified and IIC  
| | 5d) Non-IIC  
| | 6a) Nationally Certified  
| | 6b) IIC  
| | 6c) National Certified and IIC  
| | 6d) Non-IIC  
| | 7a) Nationally Certified  
| | 7b) Non-Nationally Certified  
| | 8a) Nationally Certified  
| | 8b) Non-Nationally Certified  
| | 8c) CRSC  
| | 8d) NCRA or CCP  
| | 9a) Nationally Certified  
| | 9b) Non-Nationally Certified  
| | 9c) CRSC  
| | 9d) NCRA or CCP  

**CRP Employment Services**

1. Discovery  
2. Employment Services  
3. Services Determining Eligibility  
4. 4) Additional Services (see sub-type)  

**Other VR Services**

1. TBI Resource Facilitation  
2. Foreign Language Translation  
3. Note taker Services  
4. Tutoring Services  
5. Tools and Equipment  
6. Initial Stocks and Supplies  

1a) Vocational Testing  
1b) Situational Assessment  
1c) Work Experience  
1d) Job Shadows  
1e) Other Discovery Activities (specify)  
2a) Job Development/Placement/Retention  
2b) Supported Employment  
2c) On-the-Job Supports  
2d) Job Readiness Training  
3a) Trial Work Experience (TWE)  
4a) Benefits Information Network (BIN)  
4b) Ticket to Work (TTW)  
4c) Other Additional Services (specify)
| 7. Occupational Licenses  
8. 8) Other VR Services Not Listed (specify) |   |
Appendix E

E.1 Important Points

- All Indiana Vocational Rehabilitation Service Vendors must submit claims in the electronic Claim Payments System within 90 days of the claim end date.
- All Not Approved claims must be corrected and resubmitted in the electronic Claim Payment System.
- Supporting Documentation is required when a service/good is more than $50.
- Indiana Vocational Rehabilitation Service Vendors can call the Customer Service Call Center for assistance.
  - Customer Service Call Center Hours of Operation: Monday-Friday 8:30am-5:30pm EST
  - Customer Service Call Center Telephone #: 833-475-3061
  - The Family and Social Service Administration website is a resource for Vendors to receive updates, review FAQs, review recorded training and to sign up for the Vendor listserv.