

# E-BILLING TRAINING

---

FOR REDWOOD COAST REGIONAL CENTER VENDORS

# USER ROLES

- **Vendor Administrator:** Access to the *Home, Invoices, Payments, Reports,* and *Service Provider Management* tabs. The Vendor Administrator role only has access to assigned service provider numbers; can create other vendor user and reader profiles; is able to edit, update, and submit invoices.
- **Vendor Supervisor:** Access to the *Home, Invoices, Payments,* and *Reports* tabs. The Vendor Supervisor role only has access to assigned service provider numbers; **can not** create other user profiles; and is able to edit, update, and submit invoices.
- **Vendor Staff:** Access to the *Home, Invoices, Payments,* and *Reports* tabs. The Vendor Staff role only has access to assigned service provider numbers; **can not** create other user profiles; and is able to edit and update invoices. The Vendor Staff user profile is **not able** to submit invoices.
- **Vendor Staff – No Payment Access:** Access to the *Home, Invoices,* and *Reports* tabs. The Vendor Staff – No Payment Access role only has access to assigned service provider numbers for invoices and invoice history and not payment history information; **can not** create other user profiles; and is able to edit and update invoices. The Vendor Staff – No Payment Access user profile is **not able** to submit invoices.
- **Reader:** Access to the *Home, Invoices, Payments,* and *Reports* tabs. The Reader is only able to view information for assigned service provider numbers. The Reader is unable to update, delete, or submit invoices. The Reader is unable to create other user profiles.
- **RCRC will only set up Vendor Administrators. It is the Vendor Administrators responsibility to assign other user roles. Also, if a user is terminated you must notify the regional center within 24 hours so the user can be removed.**

# IMPORTANT INFORMATION

- If you need your password reset please use the “Forgot your password or need a password reset?” link.
- Change your password the first time you log in. RCRC personnel only issue a generic password to Vendor Administrators.
- You will be prompt every 90 days to change your password. Hint: on your profile it will indicate the password expiration date.
- Make sure you save frequently. After 25 minutes of inactivity you will automatically be logged off and any unsaved information will be lost.
- Be sure to change your password the first time you log in. Passwords are case sensitive. Please use a combination of letters and numbers. Use a minimum of 5 characters.
- If any banking or other information changes, contact the Fiscal department immediately.

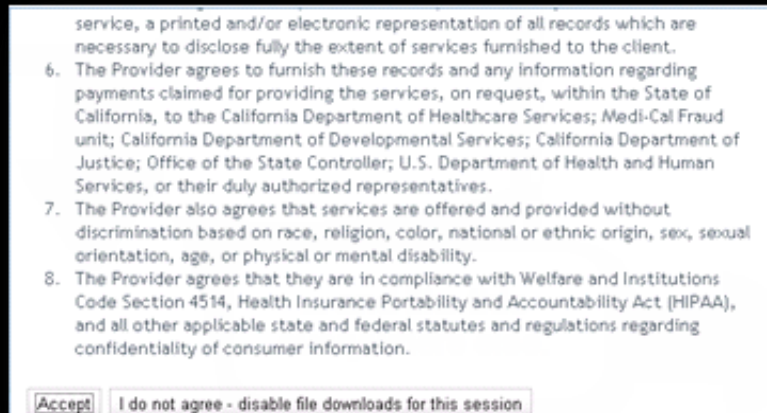
# FIRST STEPS

Go to: <https://ebilling.dds.ca.gov:8370/login>  
Click “LAUNCH APPLICATION”.

Then enter your user name and password. This will be issued by RCRC Fiscal personnel.

This page will also have important information for vendors to use or view.

Then click login.



← You must accept the Terms of Use every time you log in. Please read carefully.

# BASIC LAYOUT

The screenshot shows the eBilling system dashboard. At the top, the URL is <https://ebilling.dds.ca.gov:8370/home/dashboard>. The page title is "eBilling system". The navigation menu includes Home, Invoices, Payments, Reports, and Service Provider Management. The Service Provider Management link is highlighted with a red box and a callout box stating "Only available to Vendor administrators." Below the navigation menu, there is a "Welcome" section with a callout box stating "The page will customize to who logs in." The main content area is divided into two sections: "Service Provider Selection" and "Available Files for Download". The "Service Provider Selection" section has a search box for "Search by SPN #" and a table with columns "Service Provider #" and "Description". The "Available Files for Download" section has a table with columns "Service Provider #", "File Name", "Posted Date", and "Download". A callout box points to the "Service Provider #" column in the table, stating "Provider names and numbers will be listed here." The top right corner of the dashboard has a "User" menu with icons for email, a document, and a speech bubble, and a "Help | Logout" link.

https://ebilling.dds.ca.gov:8370/home/dashboard

eBilling system

Home Invoices Payments Reports Service Provider Management

Dashboard My Profile User

Welcome

Bulletin

02/08/2012 The email has been fixed to have a correct email address if you need assistance. Use the email icon, the envelope in the top right of the screen.

02/14/2012 E-Billing will be performing network maintenance Saturday March 3rd and is expected to be back up on Sunday March 4th. Please let me know if you have any problems.

Quick Link

User Updates Reports

Service Provider Selection

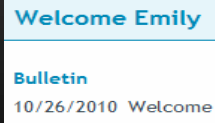
Search by SPN #

Service Provider #	Description

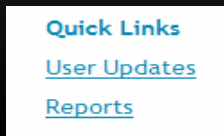
Available Files for Download

Service Provider #	File Name	Posted Date	Download
--------------------	-----------	-------------	----------

Provider names and numbers will be listed here.



**Bulletins** are posted by the Regional Centers and will appear on the top left of the home screen.



**Quick links** are available on the home screen and provide one click access to other frequently used areas of the application.



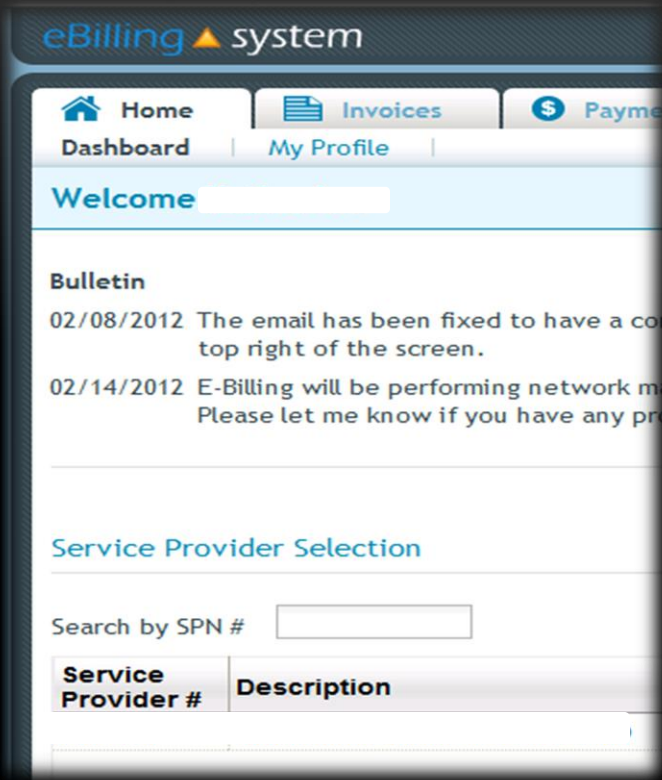
**E-Mail** icon appears on the upper right corner of the screen and will allow you to send an e-mail to the designated Regional Center contact. Please include specific information when sending emails



**Attach Documents** icon appears on the upper right corner of the screen and allows you to upload documents that the Regional Center will then be able to access. Must be attached to consumer detail lines. There is a 30 MB max. If you reach the max please call the fiscal department.



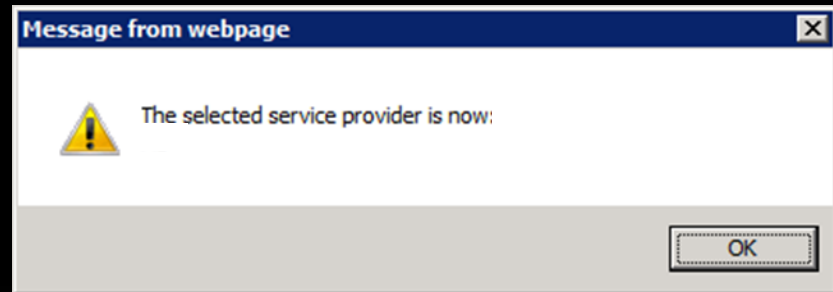
**Comments** icon appears on the upper right corner of the screen and allows you to enter comments for the Regional Center to read. Must be on the consumer detail line. This is where you would notify the Fiscal department reasons of deferring a consumer line, can't attach documents but will fax, etc.

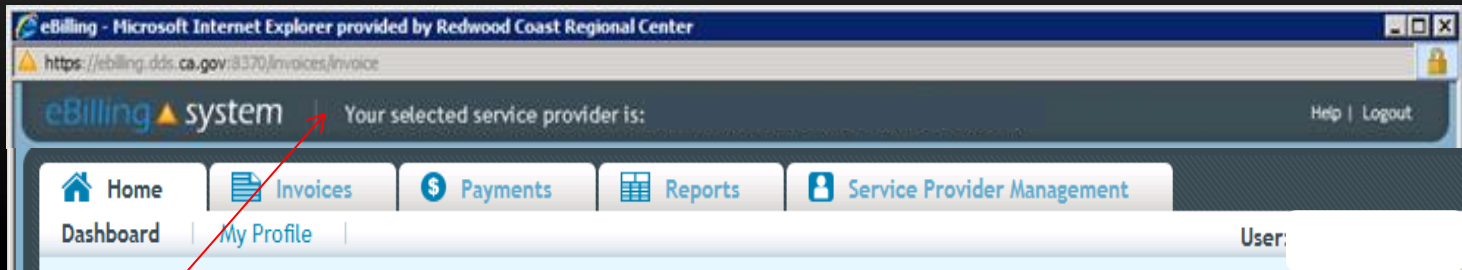


You must select a Service Provider Number (Vendor Number) before you can move on.

Type in the Service Provider Number or Click once on the list of provider numbers located below the “Search by SPN # box”.

A pop up box will appear for you to confirm the selection. If it is correct click ok.





The page will reload. It will look similar to the first page. The difference is the vendor name and number selected is displayed at the top.

The tabs available will be:

- Home
- Invoices
- Payments
- Reports
- Service Provider Management (Vendor Administrators only)



# TIME SAVING & OTHER OPTIONS

- The **DEFER** button will allow you to mark a consumer record as defer. This will indicate that the consumer did receive a service, but the authorization needs to be updated or you don't have all the needed billing information. The Regional Center will then resend the invoice at the end of the month. If **DEFER** is applied to the whole invoice, then the whole invoice will be reissued.
- The **NO SERVICE** button allows you to mark a consumer records as having had no service/billable time for the month.
- The **ADD INVOICE LINE** button will allow you to add an attendance only (A/O) detail line under a contract. This button will only work for certain service codes if the Regional Center has enabled this option. **For certain contract vendors only.**
- The **CALENDAR TEMPLATE** button will allow you to apply a calendar template with attendance information to one or more consumer records.

No Service Defer Calendar Template Add Invoice Line Submit Print Invoice Details

**Invoice Details**

Full Month Service

No Service       Defer (Regenerate Invoice Line)

Last Month of Service ?      Exit Date:

Location  
Bottom of the invoice page

Right side of detail line

# INVOICE TAB

To pull up all new invoices leave the criteria blank. Then click the search button or press enter.

Home | **Invoices** | Payments | Reports | Service Provider Management

Invoice | Invoice History | Invoice XML Upload | User:

### Invoice Search

Invoice #:  Service Code:  Invoice Date:

Service M/Y:  UCI #:

Search Clear

If there is an invoice to be completed it will show below. You must click the **EDIT** button in order to enter and be able to save information to the invoice and detail lines.

Invoice #	Service Code	Service M/Y	UCI#	Consumer Name	Invoice Date	Updated Date-Time	Updated By		
Invoice information will be here									

**NOTE:** If you double click the invoice line it will only let you view the information and you will not be able to save any information, if any is entered. You will know if you are not able to save changes as the “update”, and “update next” options at the bottom right of the screen will be grayed out.

Grayed out



Available to select



After you select the **EDIT** button, the page will reload with the invoice information at the top of the page.

The detail lines will list below Consumer Billing Details.

The orange circle indicates that line is not complete.

Each detail line must have been updated in order to submit your invoice.

Service Provider Billing Details

Invoice Number: Service Code: Service Month/Year: 01/2012  
Invoice Date: Total Units Billed: Total Amount Billed:

Consumer Billing Details Filter All


Line #	Consumer Name	UCI #	SVC Code	SVC Subco	Auth #	Auth Date	Unit Type	Units Billed	Days Attend	Gross Amount	Net Amount	No Se	De	Updated Date/Time
1														
5	XXXX AMY	0000000	896	35H	11296795	07/01/10 - 09/30/10	HD	0						Y
6	XXXX AMY	0000000	896	5H	11301224	07/01/10 - 09/30/10	HD	0						Y

No Service Defer Calendar Template Add Invoice Line Submit Print Invoice Details

To apply a mass update to all invoice lines select the top left checkbox that is on the header line. This will mark all the invoice lines for update. Otherwise select the checkboxes on the individual consumer lines. Click on the button (NO SERVICE or DEFER) you would like to use. After the records have been updated, they will be marked with the appropriate flags.

# Using the Calendar Template

## Checkbox and Units Calendars Only

- Select lines you would like to apply the button to by clicking in the check boxes on the left.
- Click on the CALENDAR TEMPLATE button. A window will pop up. 
- Fill out the appropriate calendar with attendance information.
- Click on APPLY TO ALL to apply the template to all invoices lines. Select the APPLY TO SELECTED button to update only selected invoice lines you choose.
- Click the SAVE button to save changes.
- Click the CLOSE button.
- All updated invoice lines will have an updated date and time stamp.
- Individual lines must be updated with absences.

# Monthly Calendar

- Click to fill with a check mark.
- Select all to mark all boxes or select “Full Month Service”.



- Click the blue circle icon on a



specific day to enter an absence reason for that day. Click the blue icon at the top to select an absence reason for the entire month. After the absence is reported the icon changes to a star.

Click “Update Next” to go to the next detail line. This will save your changes and go to the next line.

**NOTE:** For residential services, if a consumer exits the facility during the month, please enter the last night of service as the exit date.

## August 2010

Select All
De-Select All

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	9	10	11	12	13	14
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	16	17	18	19	20	21
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22	23	24	25	26	27	28
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29	30	31				
	<input type="checkbox"/>	<input type="checkbox"/>				

**Invoice Details**

Full Month Service

No Service       Defer (Regenerate Invoice Line)

Last Month of Service ?      Exit Date:

**Invoice Line Summary**

Total Units:  /  Days

\*Pro-ration will occur if full month checkbox and sufficient days not selected.

Unit Rate: 5033.060

Gross Amount: \$

**Received Revenue Details**

--: 0.00

--: 0.00

--: 0.00

Total Received Revenue: \$0.00

Net Amount: \$

\*Pro-ration will occur if full month checkbox and sufficient days not selected.

Overage Reason:

# Units Calendar

- Click in the box or use the tab key to type in the units.
- If necessary, break hours into quarter increments (ex. .25, .50, .75).
- Click the populate all button to populate all days with attendance. Click the Weekdays Only checkbox to populate all days Monday-Friday.

Click “Update Next” to go to the next detail line. This will save your changes and go to the next line.

Consumer Name: UCI #: Invoice #/Line #:  
Authorization #: Service Code: Service Subcode:  
Auth Dates: Units Type: Invoice Date:

January 2012 Populate All

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 Uniform Holiday	3	4	5	6	7
8	9	10	11	12	13	14
15	16 Uniform Holiday	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**Invoice Details**  
 No Service  Defer (Regenerate Invoice Line)  
 Last Month of Service? Exit Date:

**Invoice Line Summary**  
Total Units:   
Unit Rate: 104.870  
Gross Amount: \$

**Received Revenue Details**  
:: 0.00  
:: 0.00  
:: 0.00  
Total Received Revenue: 0.00  
Net Amount: \$

## Units Purchase Reimbursement

August 2010

Date	Units	Amount	
08/02/10	20.00	\$100.00	<input type="button" value="X DELETE"/>
08/26/10	10.00	\$100.00	<input type="button" value="X DELETE"/>

**Invoice Details**

No Service  Defer (Regenerate Invoice Line)

Last Month of Service ? Exit Date:

**Invoice Line Summary**

Total Units:

Total Amount:

- Click the ADD ROW button.
- Enter the Date, Units, and amount.
- Attach supporting documentation/receipts to the detail line. (You must attach documentation/receipts to receive payment.)
- You can delete rows by clicking the delete button.
- Click update next to save and go to the next line.





# SUBMITTING AN INVOICE

Check each invoice line to make sure that it has been updated with the correct information.

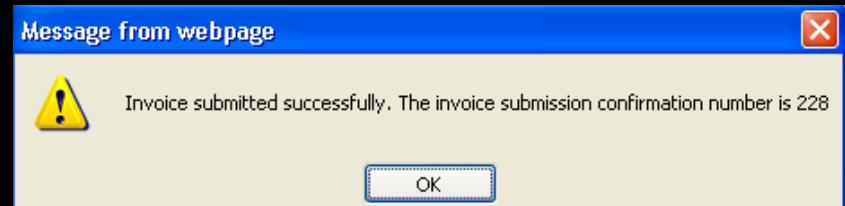
Scroll to the bottom of the screen.

Click the SUBMIT button.

A rectangular button with a light blue background and a dark blue border. The word "Submit" is written in a bold, dark blue, sans-serif font in the center of the button.

A pop up window will appear, click ok.

By clicking submit it electronically signs the invoice.



**It is best to have another person review or review it the next day before submitting. Make sure to carefully review the information entered and you are accurately billing the services provided.**

# Invoice History

Once you have submitted your invoice you will be able to search for it under the Invoice History tab.

You can use one of the search options and click SEARCH or you can just click SEARCH to bring up all.

The screenshot shows a web application interface with a navigation bar containing 'Home', 'Invoices', 'Payments', 'Reports', and 'Service Provider Management'. The 'Invoices' tab is highlighted with a red circle. Below the navigation bar, there are sub-tabs for 'Invoice', 'Invoice History', and 'Invoice XML Upload'. The 'Invoice History' sub-tab is selected. The main content area is titled 'Invoice History Search' and contains a search form with the following fields and options:

- Invoice #:
- UCI #:
- Service Code:
- Date Range:  Service M/Y,  Invoice Generation Date,  Invoice Submission Date
- From:
- To:
- Buttons: Search, Clear

The page will reload and the invoices will display like below. Double click to view.

Invoice #	Service Code	Service M/Y	UCI#	Consumer Name	Generated Date	Submitted Date-Time
Invoice number will be here.	62	07/2011			2011-08-02	2011-08-04 10:26:10
	62	08/2011			2011-08-25	2011-09-06 06:40:32

# PAYMENTS

Home Invoices **Payments** Reports Service Provider Management

Payment History User: amedin

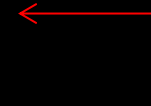
### EFT Payment History Search

Invoice #:  Reference #:  Service Code: 62-PERSONAL ASSISTANCE  
UCI #:  Service M/Y:  Date Range: From:  To:

Reference #	Invoice #	Payment Date	UCI#	Consumer Name	Service Code	Service M/Y	Total Reference Amount
111000023	0223158	2011-12-15			62	11/2011	24315.02
111000001	0220818	2011-09-16			62	08/2011	23567.45
111000009	0221451	2011-10-14			62	09/2011	22485.07
111000016	0222073	2011-11-15			62	10/2011	21834.90
121000030	0224454	2012-01-13			62	12/2011	22240.98
121000038	0225016	2012-02-15			62	01/2012	23641.06

## Payment History

Click the Payments tab, enter search criteria, and click the SEARCH button or press enter.



To view a selected EFT Payment History for an invoice, click anywhere on the invoice line.

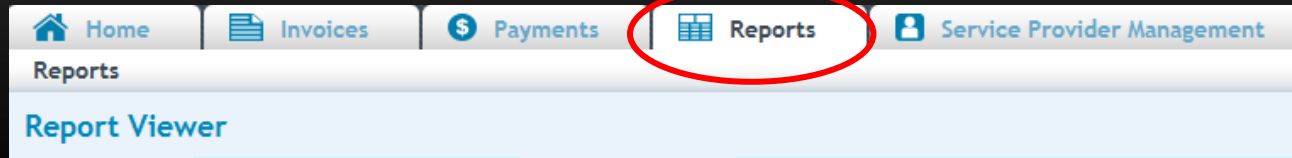
To create a .CSV file of the Payment History, select the invoice, and click the CREATE CSV button. You can either view the file or save it to your computer.

Create CSV

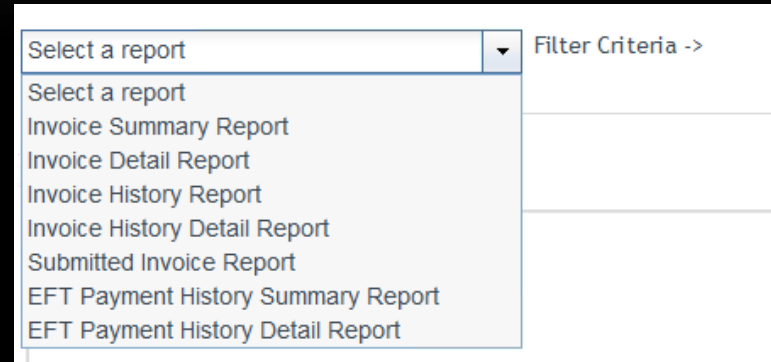
Click close to exit.

# REPORTS

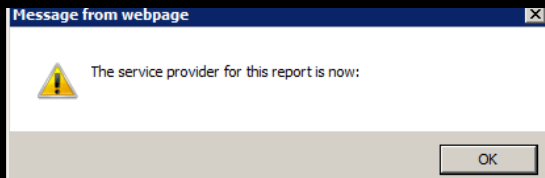
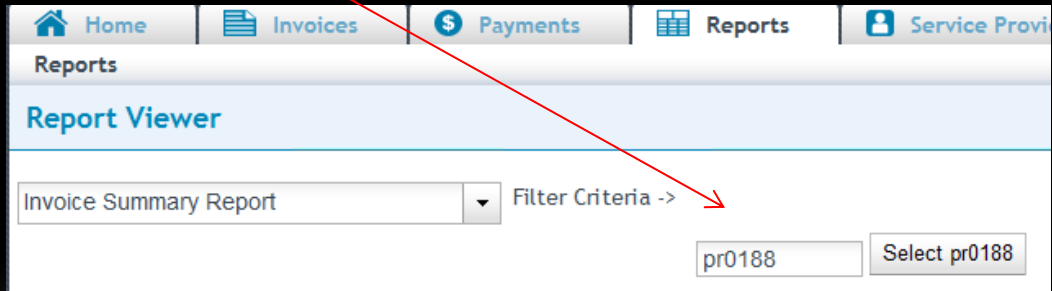
- To view reports, select the Reports tab.



- Select a report form the drop down box.
- You will need to enter the Service Provider Number (Vendor number).
- Enter the appropriate search criteria on the right hand side of the screen. (The search criteria will changed depending upon the report you've selected).

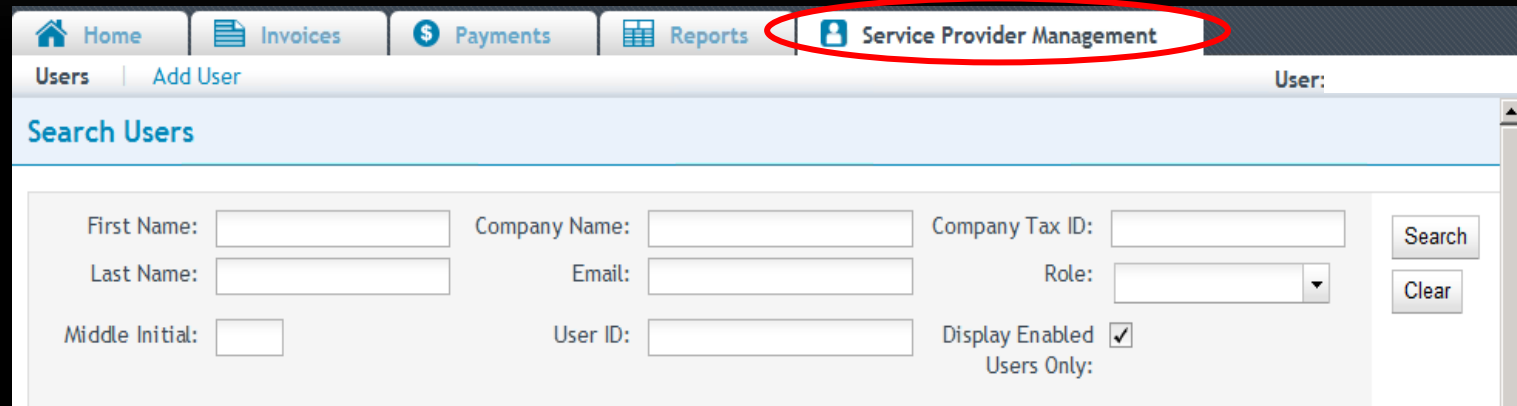


- Click select.
- A dialogue box will appear, click ok.
- You will be able to view, save, and print these reports.



# SERVICE PROVIDER MANAGEMENT

- Search for Users
- Maintain User Profiles
  - Assign SPNs to Users
- Create New User Profiles
- Assign Roles to Users

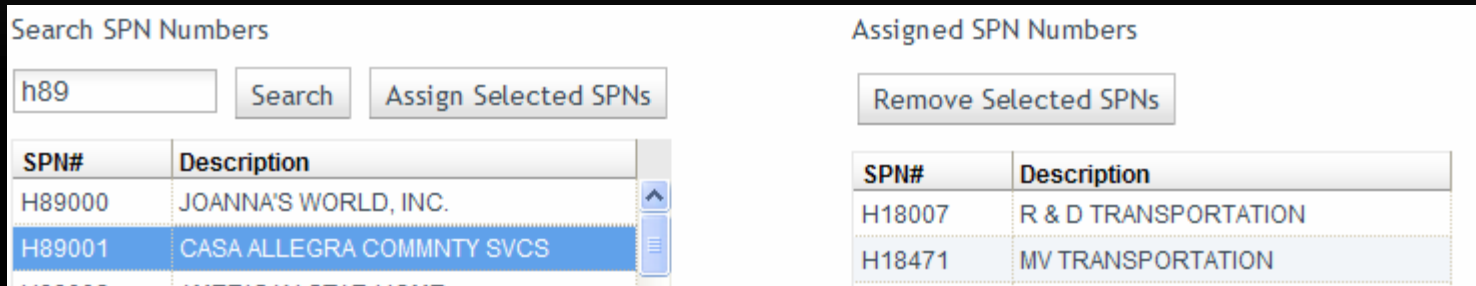


The screenshot shows a web application interface with a navigation bar at the top containing tabs for Home, Invoices, Payments, Reports, and Service Provider Management. The 'Service Provider Management' tab is highlighted with a red oval. Below the navigation bar, there is a sub-tab for 'Users' and a button for 'Add User'. The main content area is titled 'Search Users' and contains a form with the following fields: First Name, Last Name, Middle Initial, Company Name, Email, User ID, Company Tax ID, Role (a dropdown menu), Display Enabled (a checked checkbox), and Users Only. There are 'Search' and 'Clear' buttons on the right side of the form.

- Select the Service Provider Management tab.
- Click the Add Users sub tab.
- Enter the new user profile information. Fields with a red star are required. The user role defaults to reader. Choose a new user role from the drop down menu if necessary.
- Click ADD.

Click the Assign SPN button. This will be available if you are viewing a user profile in the edit/update mode or are creating a new user profile.

A pop up window will appear.



The screenshot shows a user interface for assigning SPN numbers. It is divided into two main sections: 'Search SPN Numbers' on the left and 'Assigned SPN Numbers' on the right.

**Search SPN Numbers:** This section contains a search input field with the text 'h89', a 'Search' button, and an 'Assign Selected SPNs' button. Below the search area is a table with two columns: 'SPN#' and 'Description'. The table lists several SPNs, with 'H89001' and 'CASA ALLEGRA COMMNTY SVCS' highlighted in blue.

SPN#	Description
H89000	JOANNA'S WORLD, INC.
H89001	CASA ALLEGRA COMMNTY SVCS

**Assigned SPN Numbers:** This section contains a 'Remove Selected SPNs' button and a table with two columns: 'SPN#' and 'Description'. The table lists two assigned SPNs: 'H18007' with description 'R & D TRANSPORTATION' and 'H18471' with description 'MV TRANSPORTATION'.

SPN#	Description
H18007	R & D TRANSPORTATION
H18471	MV TRANSPORTATION

Search for the appropriate SPN on the left side of the screen.

Click the SPN to highlight and select. Hold down the CTRL key to select multiple, non-consecutive SPN's. Hold the shift key to select multiple, consecutive SPN's.

Click the ASSIGN SELECT SPN button.

Click SAVE to update the user profile.

# CHANGES TO THE BILLING PROCESS

- To make billing adjustments use the RCRC Billing Adjustment Request form
  - Use a separate form for each consumer and service month
  - Once the form has been reviewed by the Fiscal Department and approved for reissue, the detail line will be reissued at the next scheduled invoice issue date.
  - Only bill for the services you are authorized and actually provided.
  - If your billing has not been processed and you have submitted a request form, the Regional Center will not process that consumers' line. It will be resent at the next scheduled invoice issue date for you to bill the entire amount of service provided.
- What is on your most current authorization is the maximum amount you will be able to bill for. You are only to bill for the services actually provided within the maximum authorized amount.
- Use the defer option whenever there is a recent change to an authorization, not all time has been calculated, dates of service are not what they should be, etc.
  - Make sure to write a comment on the detail line if you have deferred the line more than once. It needs to briefly and clearly state what the issue is. For example: “auth still not updated” or “contacted s.c. to update auth”. If no comment is entered fiscal staff will not know if there is a problem with the authorization.





# FREQUENTLY ASKED QUESTIONS

➤ *What are the minimum requirements to use E-Billing?*

Vendors need basic computer equipment and internet access with Internet Explorer 7 or 8, or Firefox.

➤ *What do I do if I receive a message saying my password has expired?*

Contact the fiscal department using the “forgot your password or need a password reset” located on the e-Billing login page.

➤ *Can I make changes to what I have entered?*

You can make changes until you click the submit button. Before submitting the invoice you must review the information. You may designate someone to review information or review the information the next day.

➤ *Do I have to complete the whole invoice at one time?*

No, you may go into as many detail lines as desired, then save and close the session. Make sure to click “update” before exiting.

➤ *Can there be more than one person making changes to the same invoice?*

Two users may be in the same invoice but not the same detail line. However, we recommend only one person in a invoice at a time.



## FREQUENTLY ASKED QUESTIONS CONTINUED

➤ *I received a message saying I have billed over the authorized amount?*

Please refer to your most current authorization. You may be billing more than what you are authorized for. If a change was made recently, select the “defer” option. A new consumer line (detail line) must be issued. What is authorized on the e-billing invoice when issued is all you can bill for. All invoice lines are generated at the end of the month. Do not bill what you can now in an attempt to bill the rest later.

➤ *Can there be more than one Vendor Administrator set up on e-Billing?*

Yes, a vendor can have multiple Vendor Administrator's enrolled on e-Billing. They must be set up by the regional center upon your written request.

➤ *Am I able to view all billings from all the regional centers I am vendored with one set of user logins?*

No, each regional center has its own portal for e-Billing and you must go to each of their portals to sign in. (This only applies to those who have billings with multiple regional centers.)

# THE END

Please contact Redwood Coast Regional Center's Fiscal Department for more questions.

(707) 462-3832