

Welcome to the ICM Service Provider Portal

Table of Contents

Welcome!.....	3
What is the Portal?	3
Visibility and Privacy	3
Getting Started.....	4
Computer System Requirements.....	4
BCeID Requirements and Registration Assistance.....	5
Request Access to the Service Provider Portal	5
Navigating the Service Provider Portal	5
Log in to the Service Provider Portal	5
Your Home Screen	6
Quick Links	7
My Notifications.....	7
iHelp and Information Icons	8
Accessing iHelp.....	8
Information Icons.....	9
Screens/Views.....	9
Searching, Viewing and Sorting	10
How to Search for Orders	11
About Orders.....	11
Quick Links	12
My Orders screen.....	12
Searching for Orders	14
Order Search Results.....	15
Viewing Order details.....	15
Reports.....	17
How to Create and Update Invoices	19
About Invoices	19

Creating an Invoice	19
Create/Update an Invoice Process.....	20
Navigation	20
1: Basic Invoice Information.....	21
2: Search for Orders (Four Sub-steps).....	22
3: Complete Invoice Lines	25
4: Add Attachments	29
5: Review & Submit Invoice	30
Cancel or Update Invoice	33
How to Search for Invoices	34
Quick Links	34
My Invoices/Payments screen	36
Searching for Invoices	37
Invoice Search Results.....	38
Viewing Invoice details	38
Payments.....	39
How to Add New Users	40
About User Administration	40
BCeID Requirements	40
User Administration in the Portal	40
Navigating to the User Administration Screen	40
How to add a user to the Portal.....	40
Modifying Portal Access for a User	43
Removing Portal Access for a User	44
Changing the Delegated Admin	44
Portal Frequently Asked Questions (FAQ)	45
Access and Navigation Frequently Asked Questions (FAQ)	45
Order Frequently Asked Questions (FAQ)	45
Invoice Frequently Asked Questions (FAQ)	46
User Administration Frequently Asked Questions (FAQ)	49
Autism Funding Contact Information	50

Welcome!

Welcome to the British Columbia ICM Service Provider Portal. Service providers are key and valued partners in the delivery of service to British Columbia's children and families. As such, we are continuously looking for ways to improve how we work together to deliver vital services to the individuals and families we serve.

What is the Portal?

The Service Provider Portal is a secure interface for Autism Service Providers to access self-service options such as creating and submitting invoices to Autism Funding electronically and viewing the status of authorizations and payments.

The Portal will provide you with:

- The ability to create an invoice and submit it electronically, replacing the need to send email or paper invoices and increasing the speed with which payment may be generated. Invoices may also be printed off for your records.
- Access to view Request to Pay Orders processed by Autism Funding, allowing you to create Invoices as soon as Orders are approved.
- Access to view the status of your payments, including payments related to email or paper invoices. The payment details include the payment amount and the payment date. You will continue to receive payments in the same manner, either by Electronic Funds Transfer (EFT) deposited directly to your bank account, or by cheque via Canada Post.

The Portal is available for access 24 hours per day, 7 days per week. Ministry support is available Monday through Friday from 8:30 a.m. – 4:30 p.m., excluding statutory holidays.

Visibility and Privacy

In accordance with Freedom of Information and Protection of Privacy legislation, individuals authorized to access the Portal are able to see information pertaining to all the children for whom your organization is authorized to provide services. This information is the same as what you currently receive in paper format (e.g. the name of the individual receiving service or the amount and types of service authorized).

You will not be able to see the same detailed information as ministry staff for those individuals, nor can you see information associated with individuals for whom you are not authorized to provide services and/or equipment.

For more information on visibility and privacy in the ICM system, please see:

- **The Personal Information and Integrated Case Management brochure**
<http://www2.gov.bc.ca/assets/gov/british-columbians-our-governments/organizational-structure/ministries-organizations/social-development-social-innovation/icm-information.pdf>

Getting Started

Computer System Requirements

To use the Service Provider Portal, it is recommended you use one of the following operating systems and Internet browsers:

Operating Systems:

- Windows Vista (32 bit)
- Windows 7 (32 bit)

Browsers:

- Internet Explorer (version 11)
- Google Chrome (version 58+)
- Firefox ESR 32bit (45 +)

If you are not currently using one of the above browsers, you can download and install them by clicking the related icon or going to the related URL and following the instructions:

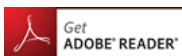
Google Chrome https://www.google.com/intl/en_uk/chrome/browser/



Firefox <https://www.mozilla.org/en-US/firefox/new/>



You will also need **Adobe Acrobat Reader** (version 7 or higher). You can download Acrobat Reader at <http://get.adobe.com/reader/otherversions/>



BCeID Requirements and Registration Assistance

To access the Service Provider Portal, your organization must have a Business BCeID (which is different from a Basic or Personal BCeID).

If you already have a Business BCeID, you can use your existing Business BCeID and password.

If you do not have a Business BCeID, go to www.bceid.ca to begin the registration process:

- Select the Register for a Business BCeID link on the main page and then select Start Registration and follow the instructions.
- You may be required to verify your identity and residential address by presenting Identification Documents at a BCeID Point of Service location.

Request Access to the Service Provider Portal

Once you have a Business BCeID, you will need to complete and submit the [Service Provider Portal Access Request](#) form (CF3001) to Autism Funding. The form can be submitted by mail, fax or by email to:

Email: MCF.ServiceProviderPortal@gov.bc.ca

Mail: PO Box 9776 STN PROV GOVT
Victoria, BC V8W 9S5

Fax: 250 356-8578

You will be notified by email when your access has been granted. The email will be sent from a generic do-not-reply address so you may need to review your email program settings if it accepts these types of emails. To follow up on your request for access to the Portal, you may email

MCF.ServiceProviderPortal@gov.bc.ca.

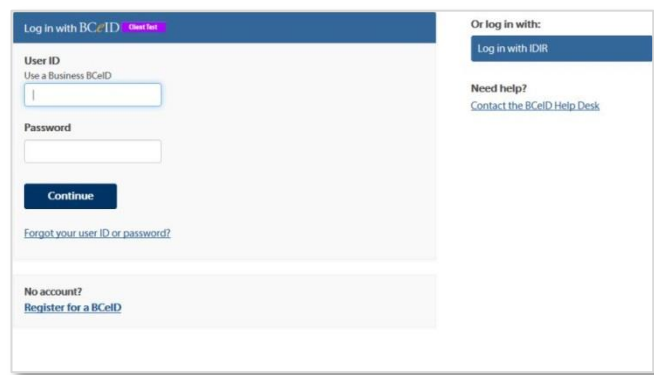
Navigating the Service Provider Portal

Log in to the Service Provider Portal

Go to https://icm.ext.gov.bc.ca/epsportal_prd to log in.

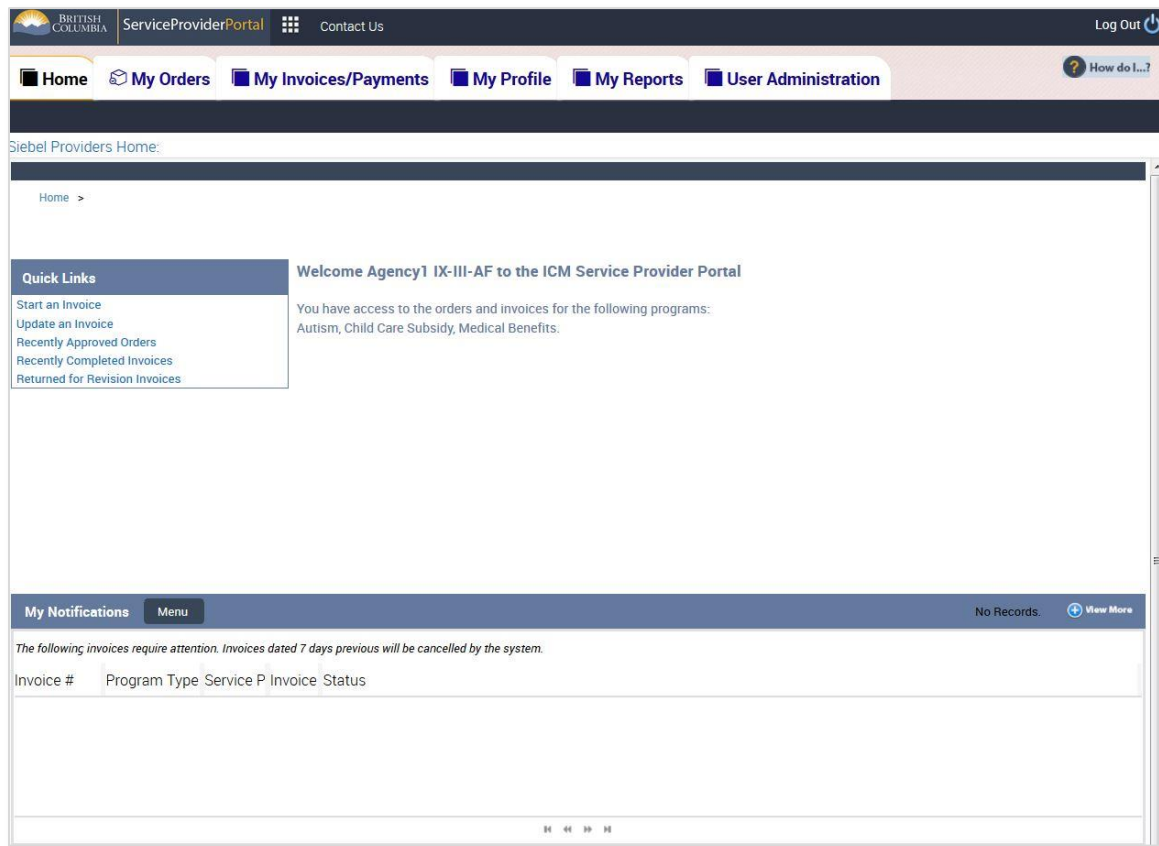
Enter your Business BCeID user name into the BCeID field. Enter your Business BCeID password into the Password field. Press 'Continue'.

You will then see a second log-in screen with account messages such as password re-set attempts and your logon history.

The screenshot shows the BCeID login interface. On the left, there's a 'Log in with BCeID' section with a 'User ID' field (labeled 'Use a Business BCeID'), a 'Password' field, and a 'Continue' button. Below these are links for 'Forgot your user ID or password?' and 'No account? Register for a BCeID'. On the right, there's a 'Or log in with:' section with a 'Log in with IDIR' button. Below that is a 'Need help?' section with a link to 'Contact the BCeID Help Desk'.

Your Home Screen

Once you have logged onto the Portal using your BCeID user ID and password, you will be taken to the Home Screen.



The Welcome message located in the centre of your screen informs you of:

- What information you can access in the Portal and for which program(s)
- Important information or current notices

Welcome Agency1 IX-III-AF to the ICM Service Provider Portal

You have access to the orders and invoices for the following programs:
Autism, Child Care Subsidy, Medical Benefits.

Quick Links

The Home screen of the portal includes Quick Links, located on the left hand side, providing shortcuts to commonly used tasks:

- Start an Invoice.
- Update an Invoice.
- Recently Approved Orders – lists your orders sorted by approval date.
- Recently Completed Invoices – lists your recently completed invoices.
- Returned for Revision Invoices – lists your invoices that have been returned for revision.



My Notifications

My Notifications are located in the centre of your screen and contain:

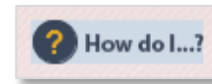
- Invoices requiring action – you can access the invoice by clicking on the Invoice Number.



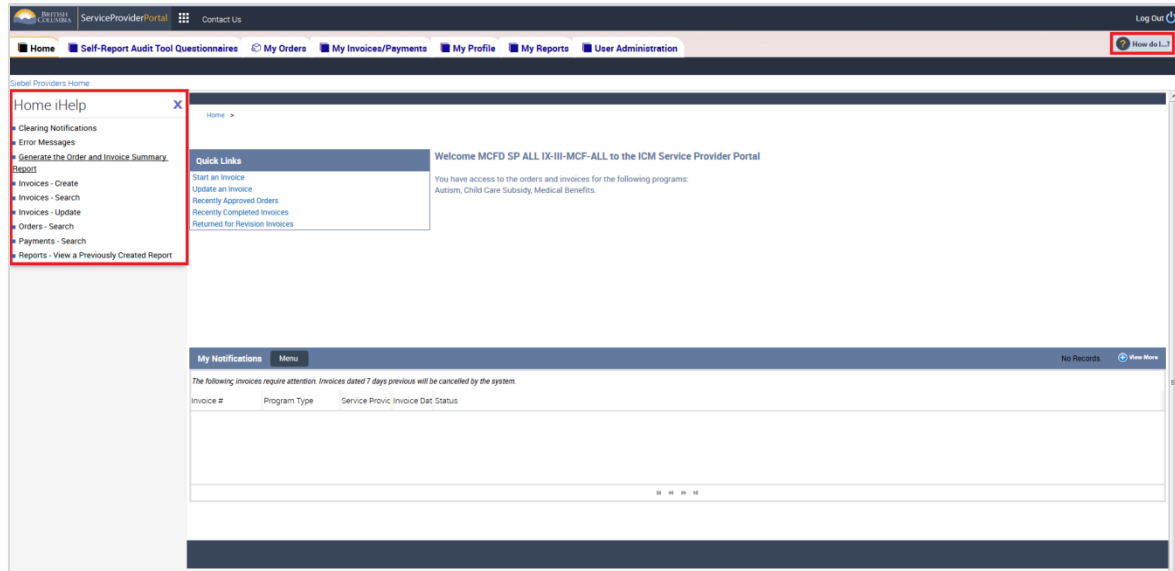
iHelp and Information Icons

Accessing iHelp

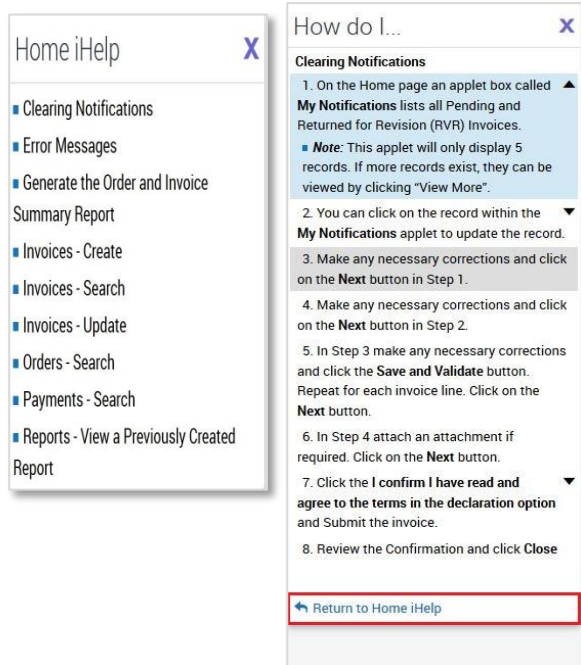
The Portal has iHelp topics that can be accessed by clicking the “How do I ...?” icon located along the top far right corner of your Home Screen.



This contains a list of iHelp topics and step-by-step instructions for completing various tasks in the Portal. The iHelp will open in a sidebar and you can keep working in the Portal with the iHelp sidebar open.



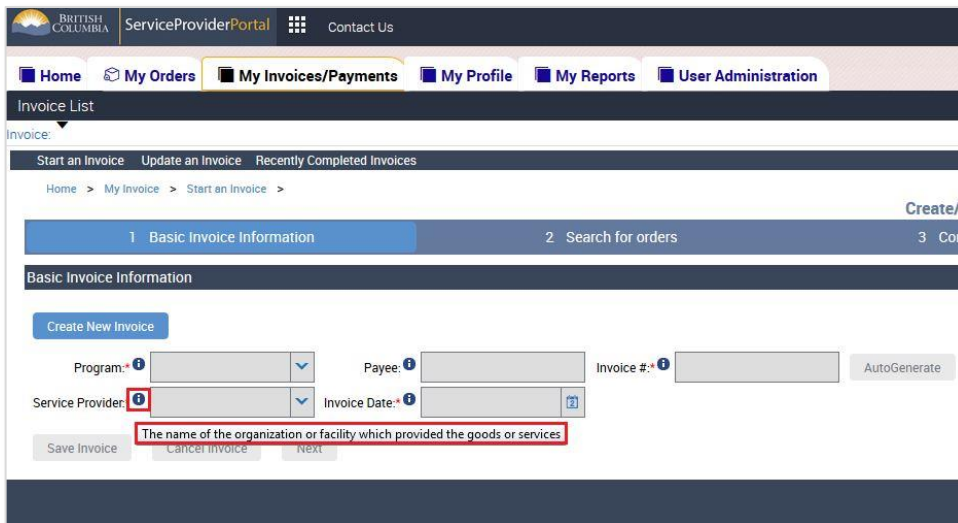
By accessing iHelp, you can find step-by-step instructions on the following topics:



- Clearing Notifications
- Run the Order and Invoice Summary Report
- Create an Invoice
- Search for an Invoice
- Update an invoice
- Search for an Order
- Search for a Payment

Information Icons

Some views in the Portal include information icons  which display text to assist you when you hover over the icon.



Screens/Views

Across the top of the screen are five tabs that provide easy navigation to:

- Home
- My Orders - Orders are products and services that have been approved by the Ministry and enable you to create invoices to receive payment.
- My Invoices/Payments - To receive a payment for services provided, service providers must submit an Invoice each month.
- My Profile – Shows your service provider related information and facilities if applicable.
- My Reports – Allows you to view reports that have been previously created.
- User Administration – Allow the addition and modification of portal users.



Some of the screens have additional quick links to common tasks in the dark blue bar under the screen titles. Below is a navigation trail showing the path you have taken to get to the current screen. You can click one of the previous screen names to quickly navigate back to that screen.

Searching, Viewing and Sorting

The My Orders and My Invoices/Payments screens have Search sections. In these sections, only the Program Type (Autism) is a required field but you can use the other fields to help refine your search.



Search Orders

Program Type: Order #: Contact Last Name:

Service Provider: Status: Contact First Name:

[Clear](#) [Search Orders](#)



Search Invoices

Program: Invoice #: Contact Last Name: Payment #:

Service Provider: Invoice Date From: Contact First Name: Payment Amount:

Status: Invoice Date To:

[Clear](#) [Search Invoices](#)

The Search Results displays up to five records but more may exist. The title bar of this section will indicate how many records are displayed and how many there are in total (example: “1 - 5 of 10 +” means there are 5 records displayed but over 10 in total). You can see the next set by clicking the arrow to the right. There is also a “View More” button in this section so you can see more records on one screen. This option to view more records also appears in the some of the Create an Invoice screens.



Order Search Results [Menu](#) 1 - 1 of 1 [View More](#)

The records may be sorted or locked by clicking the column title. An action box will appear with options to either sort the records, or lock them in the current format.

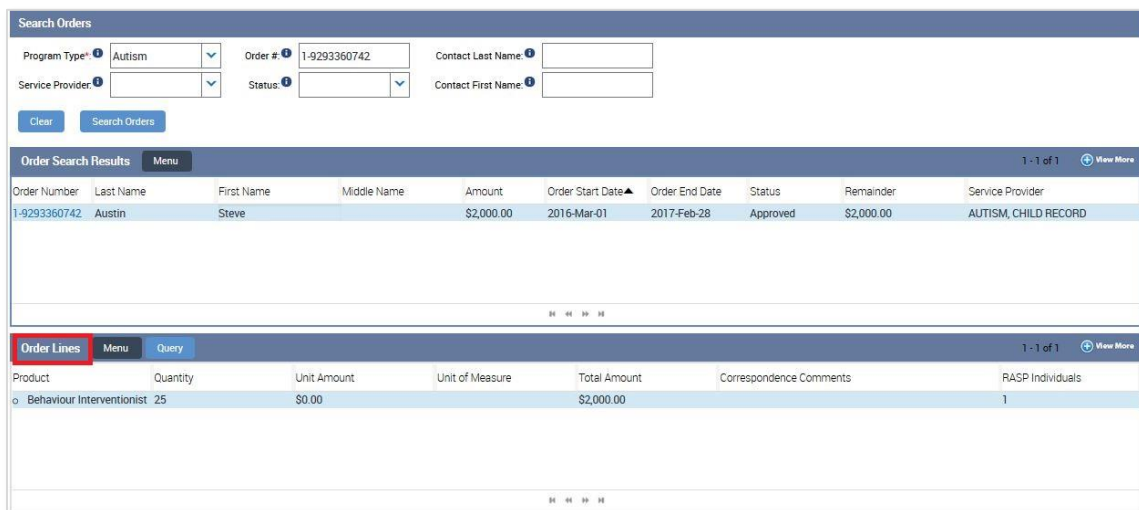


Order Number	Last Name	First Name	Middle Name	Amount	Order Start Date	Order End Date	Status	Remainder	Service Provider
1-9293360742	Austin	Steve		\$2,000.00	2016-Mar	2017-Feb-28	Approved	\$2,000.00	AUTISM, CHILD RECOR

Sort Lock

Columns can also be resized to display more information such as longer names. Simply hover on the edge of the column and click and drag the column to resize.

Below the search results is a line details section. This shows details about whichever line is selected in the search results section.



Search Orders

Program Type: Autism Order #: 1-9293360742 Contact Last Name:

Service Provider: Status: Contact First Name:

[Clear](#) [Search Orders](#)

Order Search Results [Menu](#) 1 - 1 of 1 [View More](#)

Order Number	Last Name	First Name	Middle Name	Amount	Order Start Date	Order End Date	Status	Remainder	Service Provider
1-9293360742	Austin	Steve		\$2,000.00	2016-Mar-01	2017-Feb-28	Approved	\$2,000.00	AUTISM, CHILD RECOR

Order Lines [Menu](#) [Query](#) 1 - 1 of 1 [View More](#)

Product	Quantity	Unit Amount	Unit of Measure	Total Amount	Correspondence Comments	RASP Individuals
Behaviour Interventionist	25	\$0.00		\$2,000.00		1

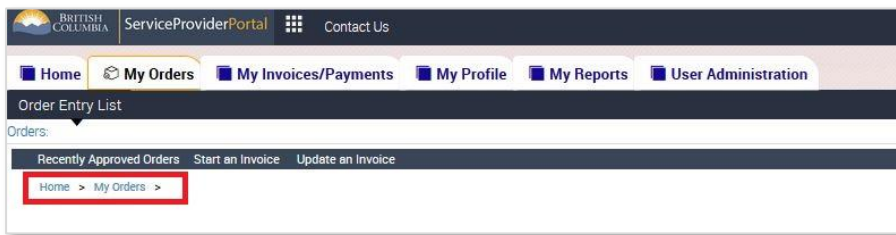
To view more details about the record, click on the Order or Invoice Number. This navigates you to a detailed view.

Navigating Through Screens

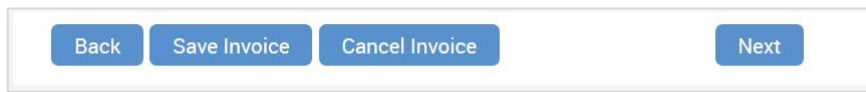
It is **NOT** recommended to use the browser's Back arrow to return to the previous screen, or press any buttons while the system is processing, as either will lead to an error message.



To return to a previous screen, use the navigation trail or click on one of screen links or quick links to return to those areas.



In the Create/Update an Invoice process, use the buttons at the bottom of the screens to navigate through the process or to Save or Cancel the Invoice.



How to Search for Orders

About Orders

Parents choose the services and service providers they need, and notify Autism Funding using a Request to Pay Service Providers/Suppliers form. After the form is reviewed a letter is sent to both the parent and the service provider that includes an authorization number.

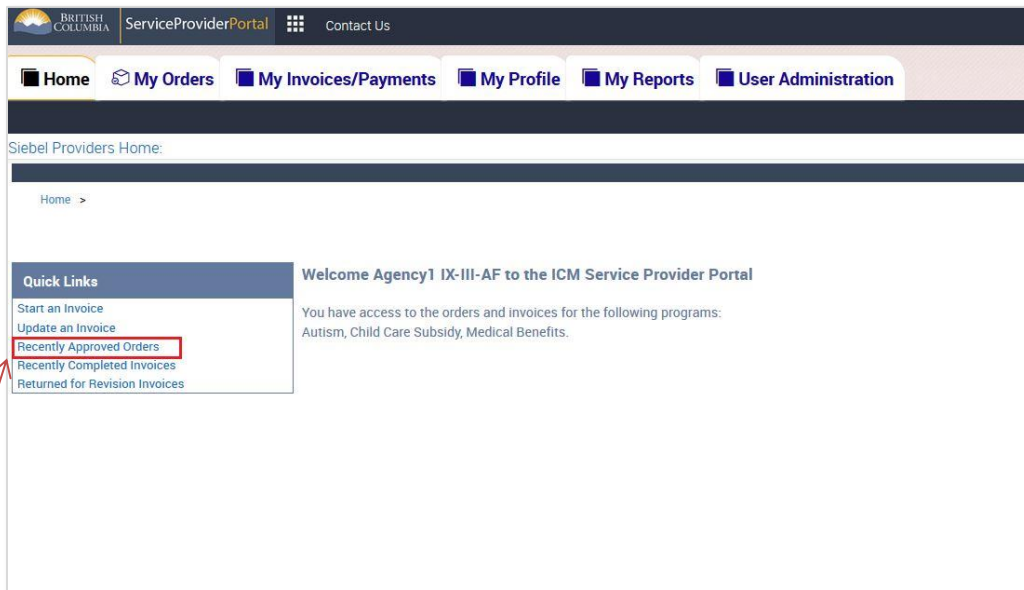
The authorization number is called an "Order" in the Service Provider Portal.

The Orders are visible in the Service Provider Portal as soon as they are approved by the ministry so you can view the details and submit invoices without waiting for mail correspondence.

You do not need to create an Invoice to see if an Order for Autism Funding is approved, you can search for Orders separately.

Quick Links

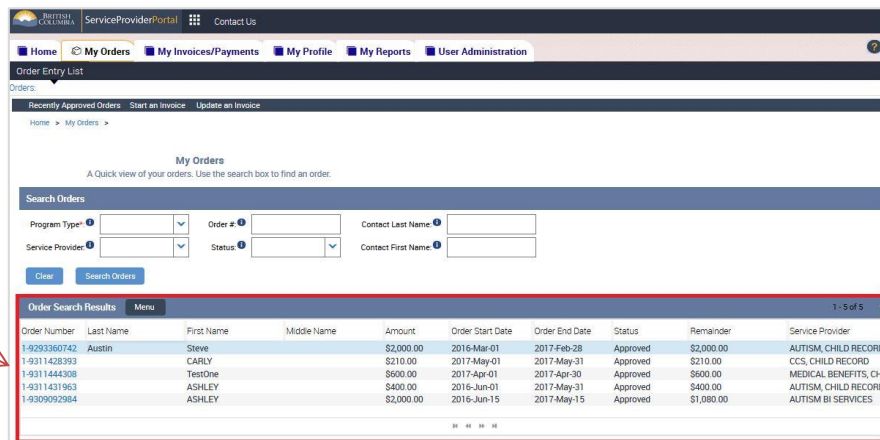
The Home screen of the Portal has Quick Links to view “Recently Approved Orders.”



Clicking the

Recently Approved Orders

link will navigate you to the My Orders screen and will display all of your approved Orders with the most recently approved ones on top.




My Orders screen

This screen allows you to view details about the Order, Order Lines and attached Invoices.

The Order shows information including the child’s name, the total amount approved, the amount remaining and the start and end Dates of the Order. The Order Lines show details about the Order including the Product (type of service), daily or hourly amount and the Total Amount for each type of service.

When you navigate to the My Orders screen, there will be no results displayed until you enter what you want to see in the “Search Orders” section. You must enter the Program Type but all other fields are optional.


ServiceProviderPortal
Contact Us
Log Out

Home
My Orders
My Invoices/Payments
My Profile
My Reports
User Administration
How do I...?

Order Entry List

Orders:

[Recently Approved Orders](#)
[Start an Invoice](#)
[Update an Invoice](#)

Home > My Orders >

My Orders

A Quick view of your orders. Use the search box to find an order.

Search Orders

Program Type:
Order #:
Contact Last Name:

Service Provider:
Status:
Contact First Name:

Clear
Search Orders

Order Search Results

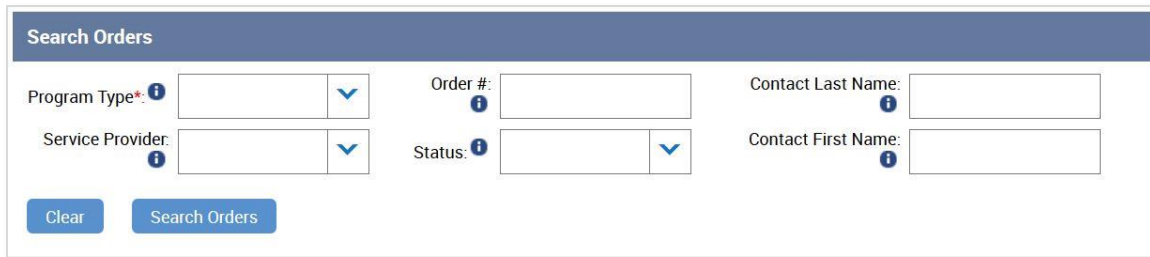
Menu
No Records. [View More](#)

Order Number	Last Name	First Name	Order Start Date	Order End Date	Status	Remainder
<div> 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 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000 1001 1002 1003 1004 1005 1006 1007 1008 1009 1010 1011 1012 1013 1014 1015 1016 1017 1018 1019 1020 1021 1022 1023 1024 1025 1026 1027 1028 1029 1030 1031 1032 1033 1034 1035 1036 1037 1038 1039 1040 1041 1042 1043 1044 1045 1046 1047 1048 1049 1050 1051 1052 1053 1054 1055 1056 1057 1058 1059 1060 1061 1062 1063 1064 1065 1066 1067 1068 1069 1070 1071 1072 1073 1074 1075 1076 1077 1078 1079 1080 1081 1082 1083 1084 1085 1086 1087 1088 1089 1090 1091 1092 1093 1094 1095 1096 1097 1098 1099 1100 1101 1102 1103 1104 1105 1106 1107 1108 1109 1110 1111 1112 1113 1114 1115 1116 1117 1118 1119 1120 1121 1122 1123 1124 1125 1126 1127 1128 1129 1130 1131 1132 1133 1134 1135 1136 1137 1138 1139 1140 1141 1142 1143 1144 1145 1146 1147 1148 1149 1150 1151 1152 1153 1154 1155 1156 1157 1158 1159 1160 1161 1162 1163 1164 1165 1166 1167 1168 1169 1170 1171 1172 1173 1174 1175 1176 1177 1178 1179 1180 1181 1182 1183 1184 1185 1186 1187 1188 1189 1190 1191 1192 1193 1194 1195 1196 1197 1198 1199 1200 1201 1202 1203 1204 1205 1206 1207 1208 1209 1210 1211 1212 1213 1214 1215 1216 1217 1218 1219 1220 1221 1222 1223 1224 1225 1226 1227 1228 1229 1230 1231 1232 1233 1234 1235 1236 1237 1238 1239 1240 1241 1242 1243 1244 1245 1246 1247 1248 1249 1250 1251 1252 1253 1254 1255 1256 1257 1258 1259 1260 1261 1262 1263 1264 1265 1266 1267 1268 1269 1270 1271 1272 1273 1274 1275 1276 1277 1278 1279 1280 1281 1282 1283 1284 1285 1286 1287 1288 1289 1290 1291 1292 1293 1294 1295 1296 1297 1298 1299 1300 1301 1302 1303 1304 1305 1306 1307 1308 1309 1310 1311 1312 1313 1314 1315 1316 1317 1318 1319 1320 1321 1322 1323 1324 1325 1326 1327 1328 1329 1330 1331 1332 1333 1334 1335 1336 1337 1338 1339 1340 1341 1342 1343 1344 1345 1346 1347 1348 1349 1350 1351 1352 1353 1354 1355 1356 1357 1358 1359 1360 1361 1362 1363 1364 1365 1366 1367 1368 1369 1370 1371 1372 1373 1374 1375 1376 1377 1378 1379 1380 1381 1382 1383 1384 1385 1386 1387 1388 1389 1390 1391 1392 1393 1394 1395 1396 1397 1398 1399 1400 1401 1402 1403 1404 1405 1406 1407 1408 1409 1410 1411 1412 1413 1414 1415 1416 1417 1418 1419 1420 1421 1422 1423 1424 1425 1426 1427 1428 1429 1430 1431 1432 1433 1434 1435 1436 1437 1438 1439 1440 1441 1442 1443 1444 1445 1446 1447 1448 1449 1450 1451 1452 1453 1454 1455 1456 1457 1458 1459 1460 1461 1462 1463 1464 1465 1466 1467 1468 1469 1470 1471 1472 1473 1474 1475 1476 1477 1478 1479 1480 1481 1482 1483 1484 1485 1486 1487 1488 1489 1490 1491 1492 1493 1494 1495 1496 1497 1498 1499 1500 1501 1502 1503 1504 1505 1506 1507 1508 1509 1510 1511 1512 1513 1514 1515 1516 1517 1518 1519 1520 1521 1522 1523 1524 1525 1526 1527 1528 1529 1530 1531 1532 1533 1534 1535 1536 1537 1538 1539 1540 1541 1542 1543 1544 1545 1546 1547 1548 1549 1550 1551 1552 1553 1554 1555 1556 1557 1558 1559 1560 1561 1562 1563 1564 1565 1566 1567 1568 1569 1570 1571 1572 1573 1574 1575 1576 1577 1578 1579 1580 1581 1582 1583 1584 1585 1586 1587 1588 1589 1590 1591 1592 1593 1594 1595 1596 1597 1598 1599 1600 1601 1602 1603 1604 1605 1606 1607 1608 1609 1610 1611 1612 1613 1614 1615 1616 1617 1618 1619 1620 1621 1622 1623 1624 1625 1626 1627 1628 1629 1630 1631 1632 1633 1634 1635 1636 1637 1638 1639 1640 1641 1642 1643 1644 1645 1646 1647 1648 1649 1650 1651 1652 1653 1654 1655 1656 1657 1658 1659 1660 1661 1662 1663 1664 1665 1666 1667 1668 1669 1670 1671 1672 1673 1674 1675 1676 1677 1678 1679 1680 1681 1682 1683 1684 1685 1686 1687 1688 1689 1690 1691 1692 1693 1694 1695 1696 1697 1698 1699 1700 1701 1702 1703 1704 1705 1706 1707 1708 1709 1710 1711 1712 1713 1714 1715 1716 1717 1718 1719 1720 1721 1722 1723 1724 1725 1726 1727 1728 1729 1730 1731 1732 1733 1734 1735 1736 1737 1738 1739 1740 1741 1742 1743 1744 1745 1746 1747 1748 1749 1750 1751 1752 1753 1754 1755 1756 1757 1758 1759 1760 1761 1762 1763 1764 1765 1766 1767 1768 1769 1770 1771 1772 1773 1774 1775 1776 1777 1778 1779 1780 1781 1782 1783 1784 1785 1786 1787 1788 1789 1790 1791 1792 1793 1794 1795 1796 1797 1798 1799 1800 1801 1802 1803 1804 1805 1806 1807 1808 1809 1810 1811 1812 1813 1814 1815 1816 1817 1818 1819 1820 1821 1822 1823 1824 1825 1826 1827 1828 1829 1830 1831 1832 1833 1834 1835 1836 1837 1838 1839 1840 1841 1842 1843 1844 1845 1846 1847 1848 1849 1850 1851 1852 1853 1854 1855 1856 1857 1858 1859 1860 1861 1862 1863 1864 1865 1866 1867 1868 1869 1870 1871 1872 1873 1874 1875 1876 1877 1878 1879 1880 1881 1882 1883 1884 1885 1886 1887 1888 1889 1890 1891 1892 1893 1894 1895 1896 1897 1898 1899 1900 1901 1902 1903 1904 1905 1906 1907 1908 1909 1910 1911 1912 1913 1914 1915 1916 1917 1918 1919 1920 1921 1922 1923 1924 1925 1926 1927 1928 1929 1930 1931 1932 1933 1934 1935 1936 1937 1938 1939 1940 1941 1942 1943 1944 1945 1946 1947 1948 1949 1950 1951 1952 1953 1954 1955 1956 1957 1958 1959 1960 1961 1962 1963 1964 1965 1966 1967 1968 1969 1970 1971 1972 1973 1974 1975 1976 1977 1978 1979 1980 1981 1982 1983 1984 1985 1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031 2032 2033 2034 2035 2036 2037 2038 2039 2040 2041 2042 2043 2044 2045 2046 2047 2048 2049 2050 2051 2052 2053 2054 2055 2056 2057 2058 2059 2060 2061 2062 2063 2064 2065 2066 2067 2068 2069 2070 2071 2072 2073 2074 2075 2076 2077 2078 2079 2080 2081 2082 2083 2084 2085 2086 2087 2088 2089 2090 2091 2092 2093 2094 2095 2096 2097 2098 2099 2100 2101 2102 2103 2104 2105 2106 2107 2108 2109 2110 2111 2112 2113 2114 2115 2116 2117 2118 2119 2120 2121 2122 2123 2124 2125 2126 2127 2128 2129 2130 2131 2132 2133 2134 2135 2136 2137 2138 2139 2140 2141 2142 2143 2144 2145 2146 2147 2148 2149 2150 2151 2152 2153 2154 2155 2156 2157 2158 2159 2160 2161 2162 2163 2164 2165 2166 2167 2168 2169 2170 2171 2172 2173 2174 2175 2176 2177 2178 2179 2180 2181 2182 2183 2184 2185 2186 2187 2188 2189 2190 2191 2192 2193 2194 2195 2196 2197 2198 2199 2200 2201 2202 2203 2204 2205 2206 2207 2208 2209 2210 2211 2212 2213 2214 2215 2216 2217 2218 2219 2220 2221 2222 2223 2224 2225 2226 2227 2228 2229 2230 2231 2232 2233 2234 2235 2236 2237 2238 2239 2240 2241 2242 2243 2244 2245 2246 2247 2248 2249 2250 2251 2252 2253 2254 2255 2256 2257 2258 2259 2260 2261 2262 2263 2264 2265 2266 2267 2268 2269 2270 2271 2272 2273 2274 2275 2276 2277 2278 2279 2280 2281 2282 2283 2284 2285 2286 2287 2288 2289 2290 2291 2292 2293 2294 2295 2296 2297 2298 2299 2300 2301 2302 2303 2304 2305 2306 2307 2308 2309 2310 2311 2312 2313 2314 2315 2316 2317 2318 2319 2320 2321 2322 2323 2324 2325 2326 2327 2328 2329 2330 2331 2332 2333 2334 2335 2336 2337 2338 2339 2340 2341 2342 2343 2344 2345 2346 2347 2348 2349 2350 2351 2352 2353 2354 2355 2356 2357 2358 2359 2360 2361 2362 2363 2364 2365 2366 2367 2368 2369 2370 2371 2372 2373 2374 2375 2376 2377 2378 2379 2380 2381 2382 2383 2384 2385 2386 2387 2388 2389 2390 2391 2392 2393 2394 2395 2396 2397 2398 2399 2400 2401 2402 2403 2404 2405 2406 2407 2408 2409 2410 2411 2412 2413 2414 2415 2416 2417 2418 2419 2420 2421 2422 2423 2424 2425 2426 2427 2428 2429 2430 2431 2432 2433 2434 2435 2436 2437 2438 2439 2440 2441 2442 2443 2444 2445 2446 2447 2448 2449 2450 2451 2452 2453 2454 2455 2456 2457 2458 2459 2460 2461 2462 2463 2464 2465 2466 2467 2468 2469 2470 2471 2472 2473 2474 2475 2476 2477 2478 2479 2480 2481 2482 2483 2484 2485 2486 2487 2488 2489 2490 2491 2492 2493 2494 2495 2496 2497 2498 2499 2500 2501 2502 2503 2504 2505 2506 2507 2508 2509 2510 2511 2512 2513 2514 2515 2516 2517 2518 2519 2520 2521 2522 2523 2524 2525 2526 2527 2528 2529 2530 2531 2532 2533 2534 2535 2536 2537 2538 2539 2540 2541 2542 2543 2544 2545 2546 2547 2548 2549 2550 2551 2552 2553 2554 2555 2556 2557 2558 2559 2560 2561 2562 2563 2564 2565 2566 2567 2568 2569 2570 2571 2572 2573 2574 2575 2576 2577 2578 2579 2580 2581 2582 2583 2584 2585 2586 2587 2588 2589</div>						

Searching for Orders

In the My Orders screen you can search for Orders by entering details in the Search Orders section. You must enter the Program Type but all other fields are optional.

- **Order #:** This is a system-generated number, known as the Authorization Number.
- **Contact First Name/Contact Last Name:** The “Contact” is the child. The child’s first and/or last name must be entered exactly as it appears on the letter from Autism Funding if you wish to use this field to search. (In other words: you cannot search using a nickname as only the legal name of the child is attached to the Order.)
- **Service Provider:** This is the individual or organization providing the services.
- **Program Type:** This is the ministry program. In this case, “Autism”.
- **Status:** You can view Orders that are Approved and Closed. You can create invoices from Approved Orders. Closed orders may be system-closed due to being fully paid, or they may have been closed by the ministry for various reasons.



The screenshot shows a web form titled "Search Orders" with a blue header bar. Below the header, there are six input fields arranged in two rows. The first row contains "Program Type*" (a dropdown menu with a blue downward arrow), "Order #" (a text input field), and "Contact Last Name:" (a text input field). The second row contains "Service Provider:" (a dropdown menu with a blue downward arrow), "Status:" (a dropdown menu with a blue downward arrow), and "Contact First Name:" (a text input field). Each input field has a small blue information icon (i) to its left. At the bottom left of the form are two buttons: "Clear" and "Search Orders".

Example searches:

- To see just the most recently approved Orders: click the “Recently Approved Orders” link on the Home screen or at the top of the My Orders screen
- To see the details of an Authorization: choose “Autism” in the Program Type field, and enter the Authorization Number the Order # field.
- To see the order history for a child (Approved and Closed Orders): enter the name in the Contact First Name and/or Contact Last Name fields, and choose “Autism” in the Program Type field.

After you’ve selected what you are searching for, click the “Search Orders” button.

Order Search Results

The Order Search Results will display Orders that match your search. There are two sections in this view: Order Search Results and Order Lines. The Order Lines show details about whichever Order is selected.

- Order Search Results: The Order shows information including the child's name, the Amount approved, the amount remaining and the Start and End Dates of the Order.
- Order Lines: The Order Lines show details about the Order including the Product (type of service), daily or hourly amount and the Total Amount for each type of service.

Search Orders

Program Type: Autism

Order #: 1-9293360742

Contact Last Name:

Service Provider:

Status:

Contact First Name:

Clear

Search Orders

Order Search Results

Menu

1 - 1 of 1

View More

Order Number	Last Name	First Name	Middle Name	Amount	Order Start Date	Order End Date	Status	Remainder	Service Provider
1-9293360742	Austin	Steve		\$2,000.00	2016-Mar-01	2017-Feb-28	Approved	\$2,000.00	AUTISM, CHILD RECORD

Order Lines

Menu

Query

1 - 1 of 1

View More

Product	Quantity	Unit Amount	Unit of Measure	Total Amount	Correspondence Comments	RASP Individuals
Behaviour Interventionist	25	\$0.00		\$2,000.00		1

Viewing Order details

The Order Search Results displays up to five orders but more may exist. The title bar of this section will indicate how many Orders are displayed and how many there are in total (example: "1 - 5 of 10 +" means there are 5 Orders displayed but over 10 in total). You can see the next set by clicking the arrow to the right. There is also a "View More" button in this section so you can see more Orders on one screen.

Order Search Results

Menu

1 - 1 of 1

View More

The Orders may be sorted by clicking on any column title and clicking "Sort". Alternatively the current sorted columns can be locked by clicking "Lock".

Order Search Results

Menu

1 - 1 of 1

Order Number	Last Name	First Name	Middle Name	Amount	Order Start Date	Order End Date	Status	Remainder	Service Provider
1-9293360742	Austin	Steve		\$2,000.00	2016-Mar-01	2017-Feb-28	Approved	\$2,000.00	AUTISM, CHILD RECORD

To view Order Line details for an Order, click the order number.

To view more details about the Order, such as invoices attached to the Order, click on the Order Number. This navigates you to the “Order detailed view” that allows you to see details including Invoices the Order has been associated to. You can then click the “Invoice Number” from here to see more details about the Invoice.

Order Search Results Menu									
1 - 1 of 1 View More									
Order Number	Last Name	First Name	Middle Name	Amount	Order Start Date	Order End Date	Status	Remainder	Service Provider
1-9293360742	Austin	Steve		\$2,000.00	2016-Mar-01	2017-Feb-28	Approved	\$2,000.00	AUTISM, CHILD RECORD

Order detailed view

A detailed view of your order

Order Overview

Program Type: Autism
Program Area: Autism
Service Provider: AUTISM, CHILD RECOI
Payee: FUNDING, AUTISM
Status: Approved
Case Number: 1-9293335141

Order Number: 1-9293360742
Amount: \$2,000.00
Remainder: \$2,000.00
Order Start Date: 2016-Mar-01
Order End Date: 2017-Feb-28
Approval Date: 2017-May-31
Received Date: 2017-Feb-01

Last Name: Austin
First Name: Steve
Middle Name:

Correspondence Comments:
Additional Comments:

Order Lines

Menu Query

1 - 1 of 1 View More

Product	Quantity	Unit Amount	Unit of Measure	Total Amount	Correspondence Comments	RASP Individuals
Behaviour Interventionist	1	\$25.00	Hour	\$2,000.00		

34 44 54 64

Invoice Lines

Menu Query


No Records. View More

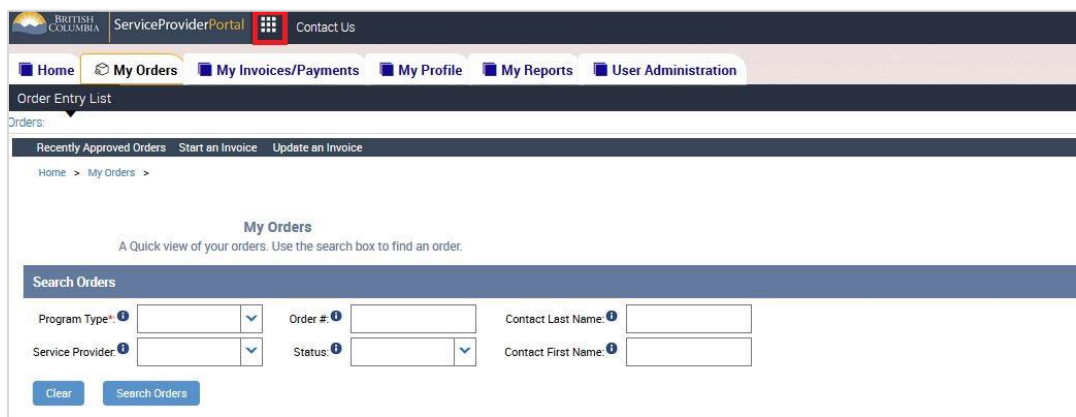
Order Contact Name	Invoice Number	Total
--------------------	----------------	-------

Reports

There is one report available called the “Orders and Invoices Summary Report.” This Report allows you to see all the details of the Order and Order Lines and all the Invoices attached. The report includes information such as the name of the RASP Individuals and all of the Dates of Service billed on each Invoice.

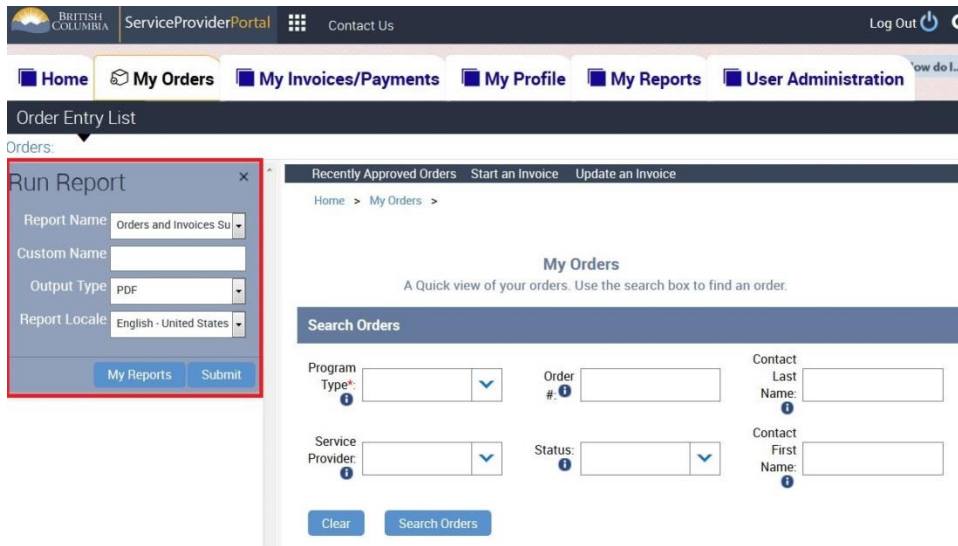
If you wish to view this report:

1. Navigate to the My Orders screen. Complete the fields in the “Search Orders” section with the Orders you would like to see and click “Search Orders”.
2. At the top of the page is the  icon. Clicking this will display two options.



3. Select the button indicated by the red square. This is the “Reports” button.





The screenshot shows the Service Provider Portal interface. At the top, there's a navigation bar with links like Home, My Orders, My Invoices/Payments, My Profile, My Reports, and User Administration. Below this is a section titled 'Order Entry List'. A 'Run Report' dialog box is open on the left, with fields for Report Name (Orders and Invoices Su), Custom Name, Output Type (PDF), and Report Locale (English - United States). It has 'My Reports' and 'Submit' buttons. The main content area is titled 'My Orders' and contains a 'Search Orders' section with various filters like Program Type, Order #, Contact Last Name, Service Provider, Status, and Contact First Name. There are 'Clear' and 'Search Orders' buttons at the bottom of the search section.

4. The “Run Report” box is now displayed. Clicking on the [Submit](#) button will generate the report. To navigate to the report from within the “Run Report” box, click the [My Reports](#) button.
5. Once the “Status” of the report has updated to “Success”, you can click on the report name to open the report.

Note: Sometimes the status will not show as “Success” while remaining on the same page. Simply click to any other heading tab at the top of the screen and then click back into “My Reports”.

The report shows all of the approved order information and invoices created on the order.



Report Run At:
Report Run By:

**Orders and Invoices Summary Report for
P4-MCFD-PORTAL**

Autism:

Child.....		Parent/Guardian.....		Program Type....		Autism	
Order Number	Status	Received Date	Approval Date	Effective Start Date	Effective End Date	Amount	Remainder
1-8419488382	Approved	2014-Jul-08	2014-Aug-07	2014-Sep-01	2015-Aug-31	\$2,000.00	\$10.00
Product		RASP Individuals		Unit of Measure		Unit Amount	
Behaviour Consultant		-		Hour		\$100.00	
Behaviour Interventionist		-		Hour		\$30.00	

Vendor Invoice #	Status	Invoice Date	Received Date	Type	Payment Method	Invoice Amount	HST/GST
1-8663443537	Ready for Approval	2015-Jun-10	2015-Jun-10	Service Provider	Cheque	\$0.00	\$0.00
Product	RASP Individuals	Qty	Unit Amount	Unit of Measure	Total Before Tax	Dates of Service	
Behaviour Consultant	-	10	\$100.00	Hour	\$1,000.00	2015-Jun-08, 2015-Jun-09	
Behaviour Interventionist	-	1	\$30.00	Hour	\$30.00	2015-Jun-10	

How to Create and Update Invoices

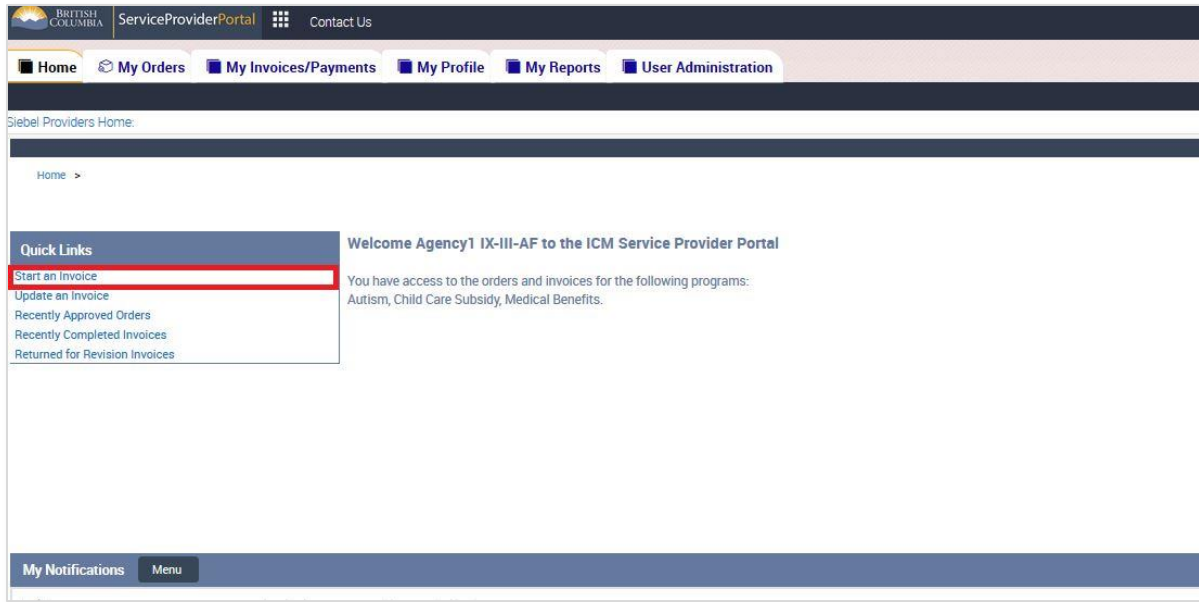
About Invoices

Parents choose the services and the service providers they need, and notify Autism Funding using a Request to Pay Service Providers/Suppliers form. After the form is reviewed a letter including an authorization number is sent to both the parent and the service provider.

To receive a payment for services provided, service providers must submit an Invoice. The Invoice may be submitted electronically in the Service Provider Portal or by mail, fax, or email. Autism Funding will process the payment and either mail a cheque, deposit payment directly to the service provider's bank account or contact the service provider if further clarification is required.

Creating an Invoice

The Home screen of the Portal has Quick Links for common Invoice functions and searches including "Start an Invoice".

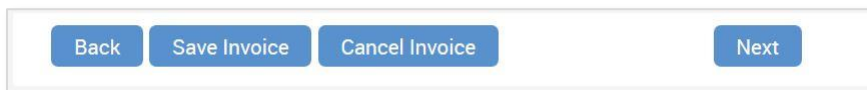


Clicking the “Start an Invoice” link creates a new Invoice and navigates you to the first step in the Create/Update an Invoice process.

Create/Update an Invoice Process

Navigation

When you create a new Invoice or update an existing Invoice you will be navigated to the Create/Update an Invoice five step process. Use the buttons at the bottom of the screens to navigate through the process or to Save or Cancel the Invoice.



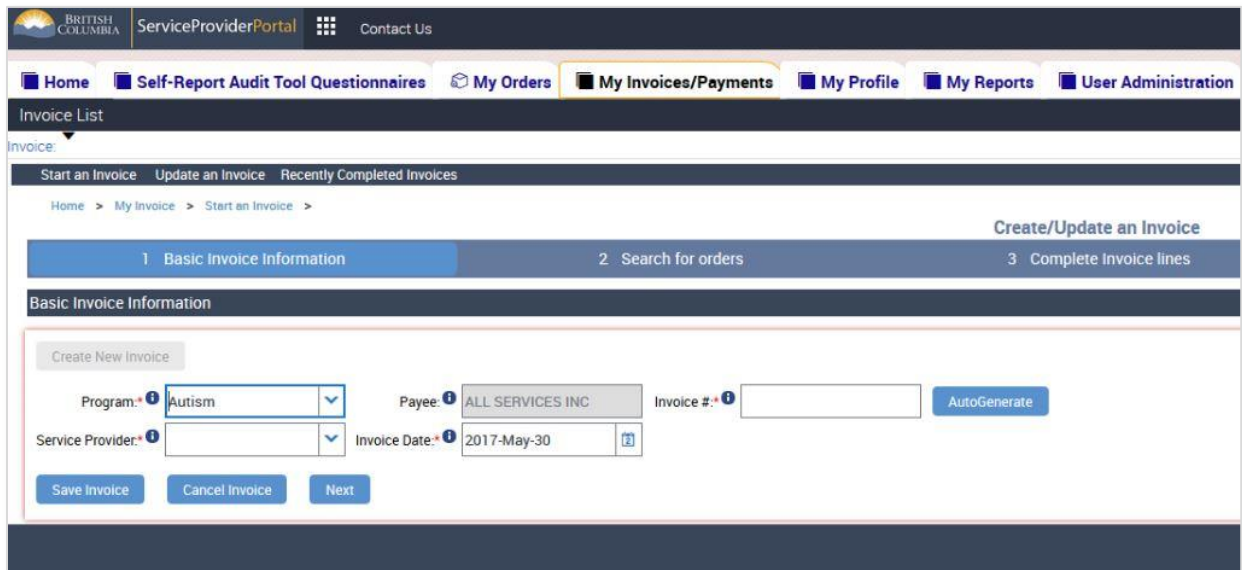
Note: The Invoice is automatically saved when you click “Next”. The “Save Invoice” button only needs to be used if you want to save your progress and return to the Invoice at a later time to complete it.

It is **NOT** recommended to use the browser’s Back arrow to return to the previous screen, or press any buttons while the system is processing as either will lead to an error message.



1: Basic Invoice Information

This step captures the Basic Invoice Information including the Program, Service Provider, and the unique Invoice number.




- Program: The ministry case type associated to the Invoice (Autism).
- Payee: The organization or individual to receive payment from the ministry. The payee cannot be changed in the Portal; it is set by the ministry based on your organization structure.
- Service Provider: The Service Provider.
- Invoice #: The invoice number must be unique to your organization on each invoice. You can enter a number you determine or click the “AutoGenerate” button to have a unique number entered for you.
 - Note: You can enter your Invoice number from your accounting program here as long as it is a unique number for each invoice. The Invoice Number can include both numbers and letters.
- Invoice Date: This is the date of the Invoice and defaults to the date it was created. You only need to change this date if you require a different date recorded for your own accounting reasons.
- Comments: This is an optional field if you have information you wish to communicate to the ministry. Changes (such as address change, etc.) should be communicated to the ministry by calling the Autism Funding.

After completing the required fields, click “Next”.

2: Search for Orders (Four Sub-steps)

This step allows you to add Order Lines to the Invoice. An Order represents approved funding for the child and the Order Number is commonly known as the “Authorization Number” by Service Providers.


[Service Provider Portal](#)
[Contact Us](#)

[Home](#)
[My Orders](#)
[My Invoices/Payments](#)
[My Profile](#)
[My Reports](#)
[User Administration](#)

[How do I...?](#)

[Start an Invoice](#)
[Update an Invoice](#)
[Recently Completed Invoices](#)

[Home](#)
[My Invoices](#)
[Start an Invoice](#)

Create/Update an Invoice:

1 Basic Invoice Information
2 Search for orders
3 Complete Invoice lines
4 Add attachments
5 Review & submit invoice

Search for orders

1 Search for the orders you would like to add to your invoice

Order Search

Order Number:
Child Last Name:
Child First Name:

Service Provider:
Order Start Date From:
Order End Date To:

Clear
Search Orders

2 View your orders search results

Select an order to view its corresponding order line(s) below

Order Search Results

1 - 2 of 2
View More

Order #	Status	Last Name	First Name	Order Start Date	Order End Date	Amount	Remainder	Service Provider	Indirect Services Remainder
1-9293360742	Approved			2016-Mar-01	2017-Feb-28	\$2,000.00	\$2,000.00	AUTISM, CHILD RECORD	\$0.00
1-9311431963	Approved			2016-Jun-01	2017-May-31	\$400.00	\$400.00	AUTISM, CHILD RECORD	\$0.00

20
10
10
10

3 Select all the order lines you would like to add to the invoice

Order Lines

Add Order Lines
Query

1 - 1 of 1
View More

<input checked="" type="checkbox"/>	Product	Unit Amount	Unit of Measure	Parent Signature	RASP Individuals
<input checked="" type="checkbox"/>	Behaviour Interventionist	\$25.00	Hour	N	

20
10
10
10

4 View the lines you have added to the invoice

Invoice Lines

Remove Invoice Lines
Query

No Records
View More

<input type="checkbox"/>	Order #	Order Contact Name	Product	Total
--------------------------	---------	--------------------	---------	-------

20
10
10
10

Back
Save Invoice
Cancel Invoice
Next

Section 1: Search for the orders you would like to add to your invoice

Order Search

Order Number:
Child Last Name:
Child First Name:

Service Provider:
Order Start Date From:
Order End Date To:

Clear Search Orders

Searching for Orders is not a required step; it is a tool that can be used if you are looking for a specific child or Order to add to the Invoice. Searching using the Order Number (known as the Authorization Number) is recommended as all the previous Orders are also visible in this view and it is important to select the current Order for the Invoice

- Order Number: Commonly known as the Authorization Number
- Child Last Name/Child First Name: The child's name

If you have entered information here and want to clear it, click "Clear" and then "Search Orders" again to see all available Orders.

Search for orders

1 Search for the orders you would like to add to your invoice

Order Search

Order Number: 1-9293360742
Child Last Name:
Child First Name:

Service Provider:
Order Start Date From:
Order End Date To:

Clear Search Orders

- Note: Only one child can be added to an invoice.

Section 2: View your order search results;

This section displays all the approved Orders. If there is more than one Order, you can select the required order by simply clicking on the order line. The order number currently selected will be highlighted in blue.

2 View your orders search results

Select an order to view its corresponding order line(s) below

Order #	Status	Last Name	First Name	Order Start Date	Order End Date	Amount	Remainder	Service Provider	Indirect Services Remainder
1-9293360742	Approved	Austin	Steve	2016-Mar-01	2017-Feb-28	\$2,000.00	\$2,000.00	AUTISM, CHILD RECORD	\$0.00

Section 3: Select the order lines you would like to add to the Invoice

After selecting the required Order in Section 2, the available Order Lines will display in this section. To add an Order Line to the invoice, click the checkmark icon next to the desired order line to select it, or click a check marked order line to deselect it.



3 Select all the order lines you would like to add to the Invoice

Order Lines	Menu	Add Order Lines	Query	
<input checked="" type="checkbox"/>	Product	Unit Amount	Unit of Measure	Parent Signature RASP Individuals
<input checked="" type="checkbox"/>	Behaviour Interventionist	\$25.00	Hour	N

« » »» »»»

- If you have multiple rates for the services you provide, you may have an Order Line for each rate. If there are not separate Order Lines for each rate, you may need to contact Autism Funding to have the Order Lines adjusted.
- Some Products and Services are not supported for Portal Invoices such as equipment and Orders that require a Parent Signature. Please submit invoices for these products and services by mail, fax, or email.

Section 4: View the lines you have added to the Invoice

After you click “Add Order Lines” in the previous section, they will display in this section as Invoice Lines.

4 View the lines you have added to the Invoice

Invoice Lines	Menu	Remove Invoice Lines	Query	
<input checked="" type="checkbox"/>	Order #	Order Contact Nai	Product	Unit Amount Unit Of Measu RASP Individual
<input checked="" type="checkbox"/>	1-929336...	Steve Austin	Behaviour Intervention...	\$25.00 Hour

1 - 1 of 1 [View More](#)

If an Invoice Line needs to be removed from the Invoice, click the “Remove Invoice Lines” button located in the top menu bar of section four.

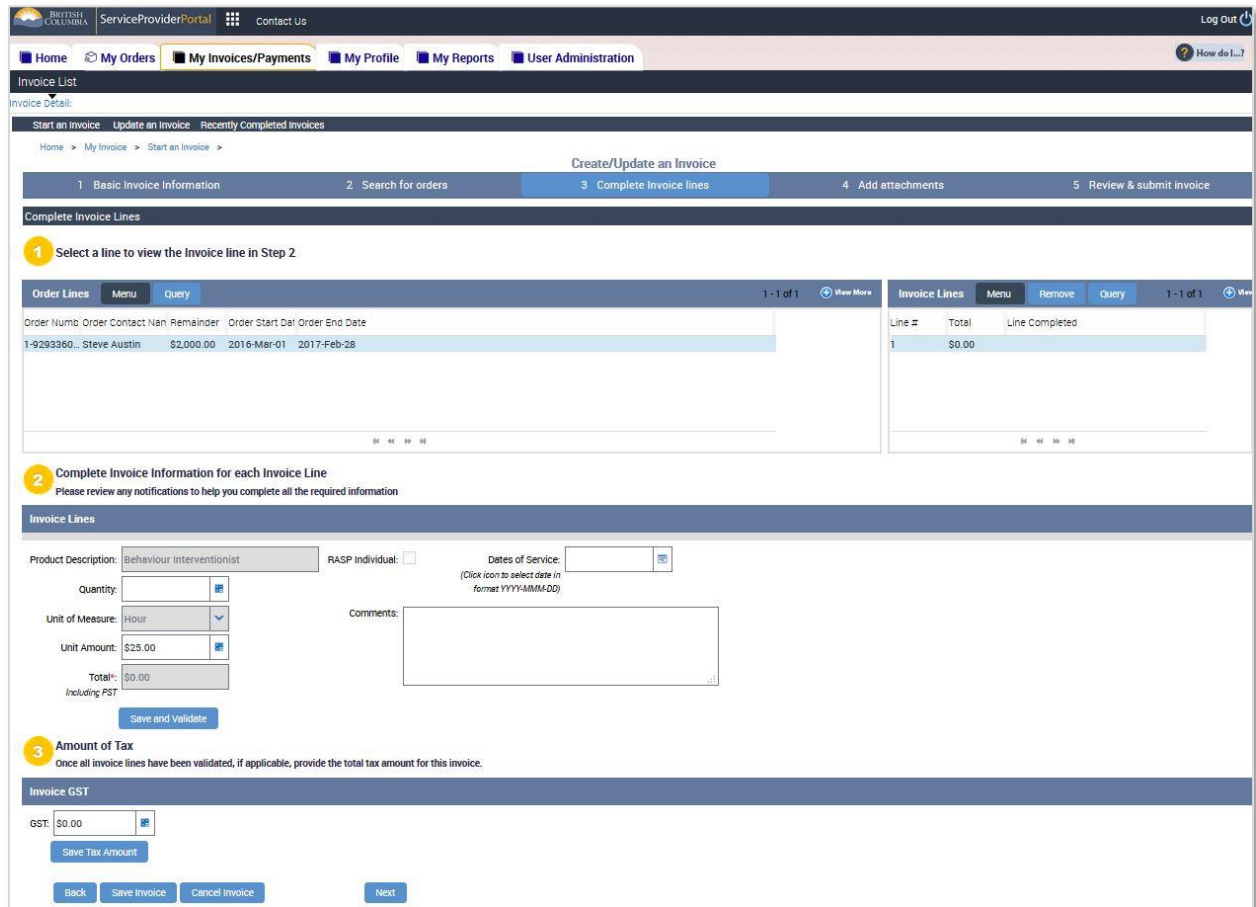
Remove Invoice Lines

After adding all the required Order Lines to the Invoice, click “Next”.

3: Complete Invoice Lines

This step allows you to complete the dates and total hours you provided service for the client.

- Note: If you need to remove an Invoice Line from the invoice, you can click the “Back” button at the bottom of the screen. It is **NOT** recommended to use the browser’s Back arrow to return to the previous screen, or press any buttons while the system is processing as either will lead to an error message.



Section 1: Select a line to view the Invoice line selected in Step 2

This section displays all the Order Lines attached to the Invoice as Invoice Lines and their completion status. You cannot select or change information in this section directly, the changes are made in Section 2, below, and the details automatically update into this section. The Order Lines on the left show the Order Lines you added to the Invoice and the amount remaining on the Order. The Invoice Lines on the right will show the amounts you are billing on the Invoice for services provided.

1 Select a line to view the Invoice line in Step 2

Order Lines					Invoice Lines		
Order Number	Order Contact Name	Remainder	Order Start Date	Order End Date	Line #	Total	Line Completed
1-9293360742	Steve Austin	\$2,000.00	2016-Mar-01	2017-Feb-28	1	\$0.00	

The Order Line / Invoice Line highlighted in blue is the active line being worked on in Section 2 below. After that line is completed, the Total amount will be updated, the “Line Completed” field will be updated, and the next Order Line / Invoice Line will be highlighted.

1 Select a line to view the Invoice line in Step 2

Order Lines					Invoice Lines		
Order Number	Order Contact Name	Remainder	Order Start Date	Order End Date	Line #	Total	Line Completed
1-9293360742	Steve Austin	\$450.00	2016-Mar-01	2017-Feb-28	3	\$500.00	✓
1-9293360742	Steve Austin	\$450.00	2016-Mar-01	2017-Feb-28	4	\$625.00	
1-9293360742	Steve Austin	\$450.00	2016-Mar-01	2017-Feb-28	5	\$475.00	

The “Line Completed” field will have one of three symbols when it is completed (it will be blank if not completed):

- ✓ This means the Invoice Line information entered is valid.
- ⚠ This means the Invoice Line information entered is valid, but it will require additional review by the ministry before approval.
- ✗ This means the Invoice Line is not valid and the Invoice cannot be submitted with the details entered in Section 2. Review the Notification in Section 2 for details.

Note: The Order Lines and Invoice Lines tables in this section sometimes are not aligned, especially when there are multiple lines.

Section 2: Complete Invoice Information for each line

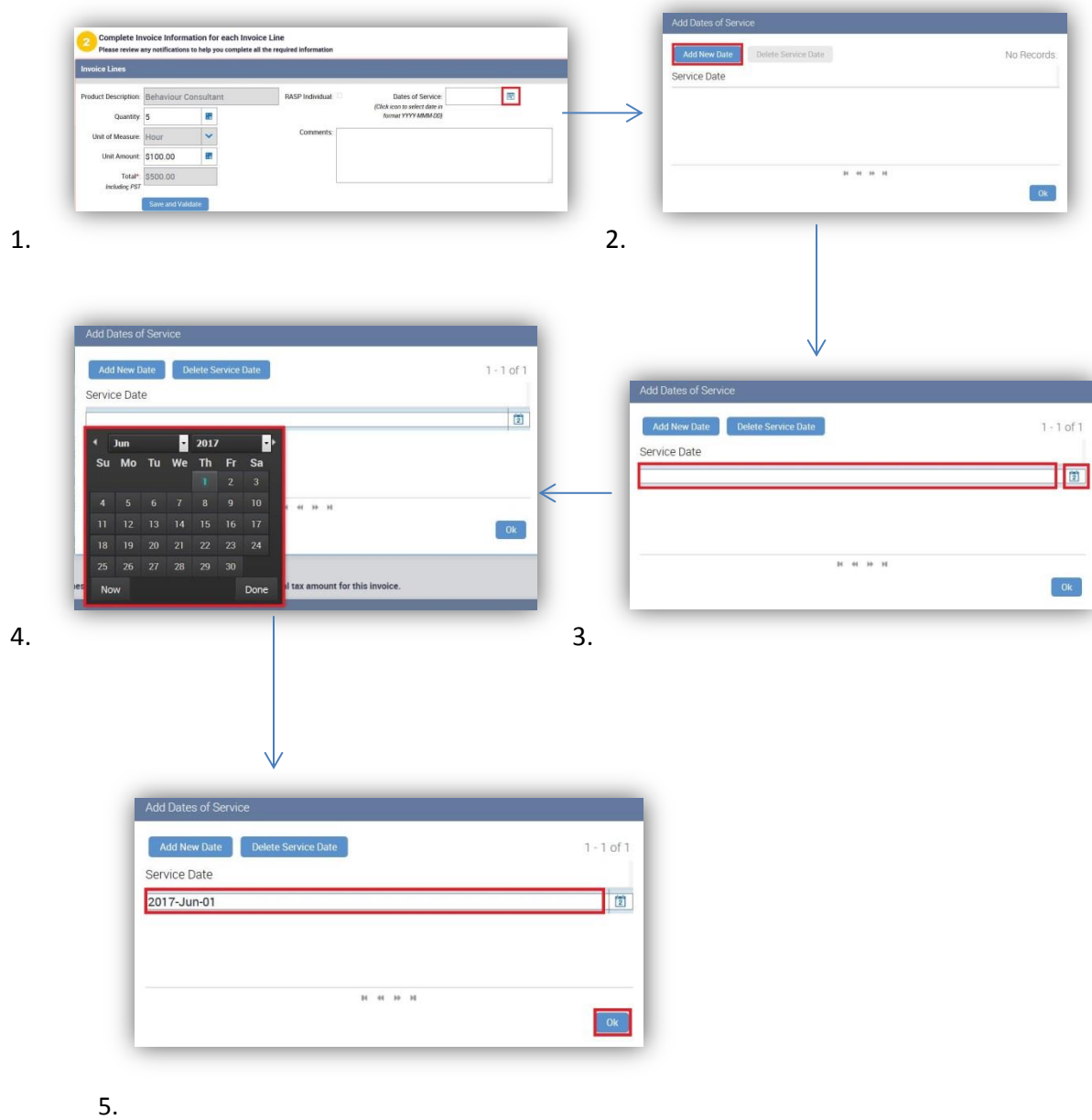
This section allows you to enter the Dates of Service and the Quantity (total number hours or days of service for all Dates of Service entered) for each Invoice Line.




Dates of Service

The Dates of Service are required for each Invoice Line. Click the




button to select the Date of Service.



1. Click the  icon in the “Dates of Service” box.
2. Click the  button.
3. A line appears for the date. Click the calendar icon , which brings up the calendar.

- Choose the date of service. Alternatively you can enter the date without clicking the calendar icon. Enter dates manually by typing in the format: "year-month-day". (I.e. January 31, 2017 would be typed as 2017-01-31). The date will automatically populate once you click off the service date line.

NOTE: You can click the  button if the date needs to be removed.

- Repeat if there are more dates to add. Click the  button once all of the service dates have been added.

Invoice Lines

The hourly or daily rate is automatically populated in the Unit Amount field. You can change this amount if necessary but you cannot increase it above the amount Approved on the Order Line. You must type the total number of hours or days for this Invoice Line in the Quantity field and the Total amount will be calculated automatically.

You must enter any related comments in this screen. For example, if you selected 'Specialized Therapies' as the type of service provided, you will need to include what the specialized therapy was, such as 'Music Therapy'.

2


Complete Invoice Information for each Invoice Line


Please review any notifications to help you complete all the required information


Invoice Lines


Product Description: Behaviour Consultant

RASP Individual: ☐

Dates of Service: 2017-Feb-05 

Quantity: 5 

Unit of Measure: Hour 

Unit Amount: \$100.00 

Total*: \$500.00

including PST

Comments:

Save and Validate

The Notification section near the top of the window will update if there is an error or other notice.


2

Complete Invoice Information for each Invoice Line

Please review any notifications to help you complete all the required information


Invoice Lines

The sum of all invoice lines is greater than the remainder on the order. Please lower the invoice line amount and validate again.

After you have completed the details in this section, click the  button.

1 Select a line to view the Invoice line in Step 2

Order Lines					Invoice Lines			
Order Number	Order Contact Name	Remainder	Order Start Date	Order End Date	Line #	Total	Line Completed	
1-9293360742	Steve Austin	\$2,000.00	2016-Mar-01	2017-Feb-28	3	\$500.00		
1-9293360742	Steve Austin	\$2,000.00	2016-Mar-01	2017-Feb-28	4	\$0.00		
1-9293360742	Steve Austin	\$2,000.00	2016-Mar-01	2017-Feb-28	5	\$0.00		

You will notice the “Invoice Lines” window in the top right corner has updated with a  next to the successfully completed order line. The next order line will automatically select.

Continue the process for each order line.

Section 4: Amount of Tax

The GST amount for the entire invoice can be added in this section (if applicable). You must type the amount and then click the “Save Tax Amount” button. The amount entered will be displayed in the final step of the invoice process.

3 Amount of Tax
 Once all invoice lines have been validated, if applicable, provide the total tax amount for this invoice.

Invoice GST

GST:








Once all Invoice Lines are completed, click the  button.

4: Add Attachments

Adding attachments is a required step if services provided were for a child under 6 and the RASP professional is a Category B provider because their supervisor’s signature is required on the invoice. Use the Invoice Attachments to attach a copy of the signed invoice. If the invoice is not signed by the supervisor, the invoice will be returned.

In Step 4 “Add Attachments” of the Portal Create/Update an Invoice process, there is an option to add an attachment to submit to the Ministry with your Invoices. If no attachments are required, click ‘Next’.

To add an attachment click the **Add Attachment** button, and select the file that you wish to attach.

To delete an attachment, highlight the file you want to delete and click the **Delete Attachment** button.

5: Review & Submit Invoice

This step allows you to review all the details of the invoice prior to submitting it to the ministry. If any of the Invoice Line Total amounts or the GST amounts are not correct, use the **Back** button at the bottom of the screen to return to previous steps and update the information.

Service Provider Portal | Contact Us | Log Out

Home | My Orders | My Invoices/Payments | My Profile | My Reports | User Administration

How do I...?

Invoice List

Invoice Summary:

Start an Invoice | Update an Invoice | Recently Completed Invoices

Home > My Invoice > Start an Invoice >

Create/Update an Invoice

1 Basic Invoice Information | 2 Search for orders | 3 Complete Invoice lines | 4 Add attachments | 5 Review & submit invoice

Review and Submit Invoice

FUNDING, AUTISM
104 5430 201 St
Langley BC V3A 0A2

Invoice Number: JOSHtest
Date: 2017-May-31

Program Type: Autism | Service Provider: AUTISM, CHILD REC | Invoice Amount: \$1,500.00 | Payment Method: Cheque

Invoice Lines | Menu | Query | 1 - 3 of 3 | View More

Product	Quantity	Unit Amount	Unit of Measure	Total	Order Number	Order Contact Name	Dates of Service	RASP Individual	Comments
Behaviour Consultant	5	\$100.00	Hour	\$500.00	1-9293360742	Steve Austin	2017-Feb-01		
Speech-language Pathologist	4	\$125.00	Hour	\$500.00	1-9293360742	Steve Austin	2017-Feb-01		
Behaviour Interventionist	20	\$25.00	Hour	\$500.00	1-9293360742	Steve Austin	2017-Feb-01		

1 2 3 4 5 6 7 8 9 10 11 12

GST: \$0.00
Total Amount: \$1,500.00


Comments:

Optional: Comments to the Ministry regarding this Invoice (255 characters)

Read Declaration

☐ I confirm I have read and agree to the terms in the declaration

Back | Save Invoice | Cancel Invoice | Submit Invoice

- Note: Only one of the Dates of Service saved for each Invoice Line is displayed in this view. To review all of the dates for an order line click the date of service on the desired order line, and then click the  button.

Enter any comments in the comments section (such as an invoice with duplicate dates of service for different services) and when you are ready to submit the Invoice, click the box to confirm you have read and agree to the terms in the declaration. The declaration can be read by clicking the “Read Declaration” button. Click “Submit Invoice” if you are ready to submit the Invoice.

Comments:

Optional: Comments to the Ministry regarding this Invoice (255 characters)

[Read Declaration](#)

☒ I confirm I have read and agree to the terms in the declaration

[Back](#) [Save Invoice](#) [Cancel Invoice](#) [Submit Invoice](#)

Declaration:

I hereby certify that I, or a partnership, society, corporation or other organization for which I am an authorized signatory (the “Supplier”) has provided the goods or services described in this invoice to or for the person or persons identified in the invoice in accordance with all applicable Government of British Columbia legislation, policy, practises, procedures and guidelines and that the information in this invoice is true and complete. I further certify that the Supplier is not claiming payment for the goods or services from any other person and will not be reimbursed by any other person for the cost of the goods or services. I acknowledge and agree that at the request of the Government of British Columbia the Supplier will provide complete and accurate records to support the Supplier's claim for payment for the goods or services described in this invoice. I further acknowledge and agree that any overpayment related to this invoice is a debt due to the Government of British Columbia that the Supplier is liable to repay on demand.

After submitting the invoice, you will see a Confirmation screen indicating your invoice has been successfully submitted. You can print this screen for your records but you are able to search for the Orders and Invoices in other views if you want to print this information later.

Service Provider Portal | Contact Us | Log Out

Home | My Orders | **My Invoices/Payments** | My Profile | My Reports | User Administration

Invoice List

Invoice Summary

[Start an Invoice](#) [Update an Invoice](#) [Recently Completed Invoices](#)

Your invoice has been successfully submitted.

FUNDING, AUTISM
104 5430 201 St
Langley BC V3A 6A2

Invoice Number: JtestAF
Date: 2017-Jun-05

Program Type: Autism | Service Provider: AUTISM, CHILD REC | Invoice Amount: \$1.00 | Payment Method: Cheque

Product	Quantity	Unit Amount	Unit of Measure	Total	Order Number	Order Contact Name	Dates of Service	RASP Individual	Comments
Behaviour Interventionist	1	\$1.00	Hour	\$1.00	1-9293360742	Steve Austin	2017-Feb-15		

GST: \$0.00
Total Amount: \$1.00

[Close](#)

If you see an error message instead of this Confirmation screen, the invoice has likely been submitted but you can confirm this by searching for the Invoice. To see if the Invoice just completed was submitted successfully, go to the My Invoices/Payments screen and search for the Invoice. If the invoice is in “Ready for Approval”, “Approved” or “Paid” Status then it was received successfully by the ministry. If it is in another Status, such as “Pending” or “Cancelled”, then it has not been received by the ministry.

Cancel or Update Invoice

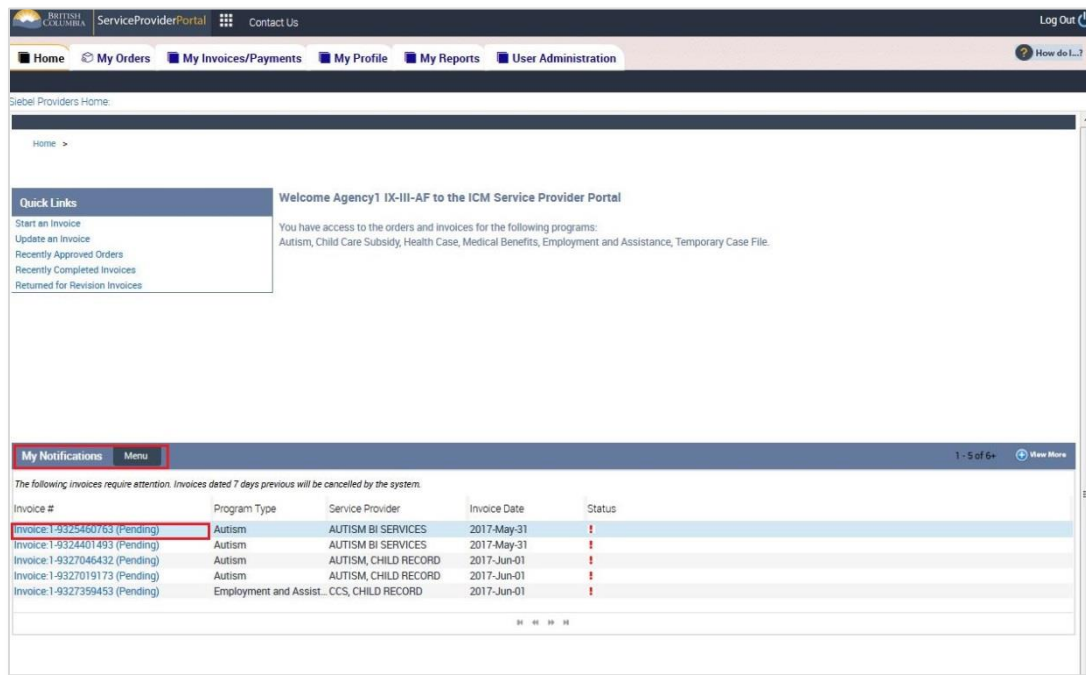
Invoices created and not submitted or cancelled are saved in a Pending state. These invoices may have Order Lines tied to them, which may prevent you from billing these Order Lines on another Invoice.

After you submit an invoice through the Portal, it will be validated by ministry staff. The ministry cannot change information you have entered on invoice lines. This is to preserve the financial integrity and audit trail of the record. If changes need to be made, the ministry program will electronically return the invoice through the Portal and send you an email or call you explaining the revisions required.

Pending and Returned for Revision Invoices are displayed on the Home screen in the My Notifications section. You can also search for a specific Invoice using the “Update an Invoice” quick link on the Home screen or at the top of the My Invoices/Payments screen.

You can locate the Invoice two ways:

- From the My Notifications on the home screen: Click on the Invoice Number. If the invoice you are looking for does not appear on the first page, click the directional arrows at the bottom to navigate between pages.



Service Provider Portal | Contact Us | Log Out

Home | My Orders | My Invoices/Payments | My Profile | My Reports | User Administration | How do I...?

Quick Links: Start an Invoice, Update an Invoice, Recently Approved Orders, Recently Completed Invoices, Returned for Revision Invoices

Welcome Agency1 IX-III-AF to the ICM Service Provider Portal

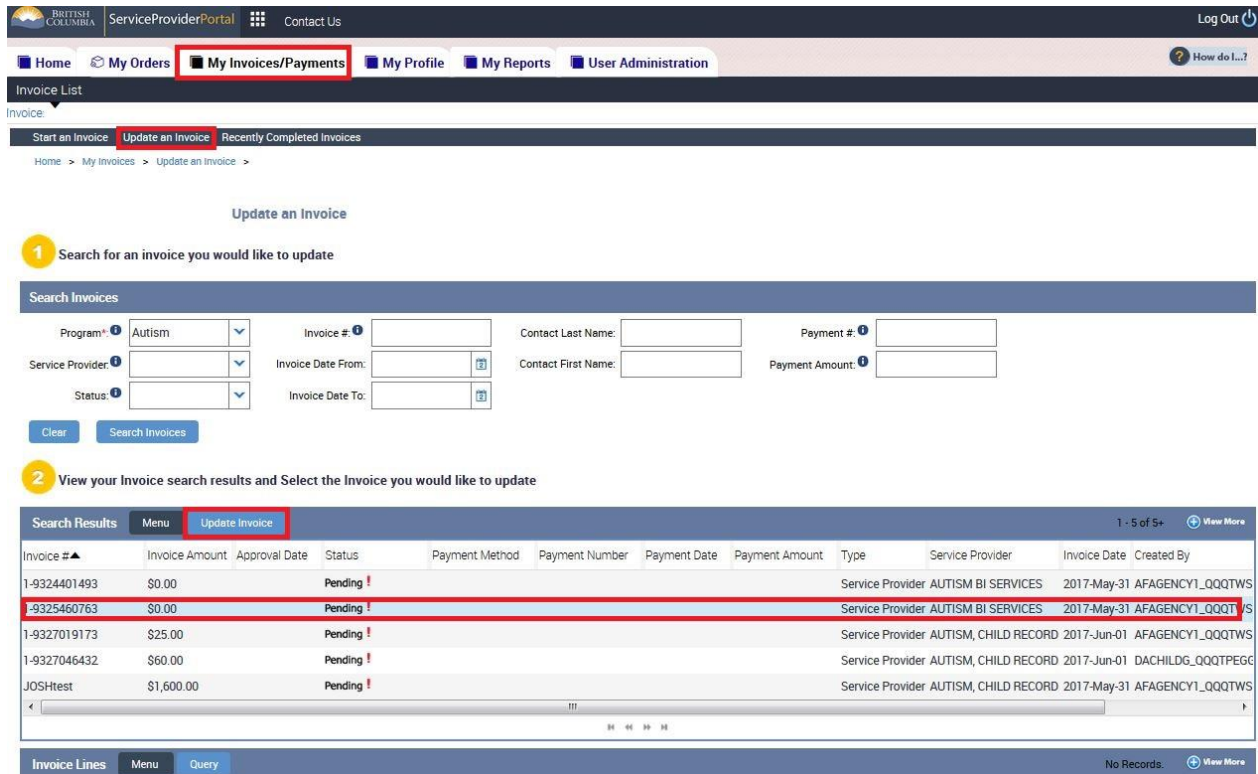
You have access to the orders and invoices for the following programs: Autism, Child Care Subsidy, Health Case, Medical Benefits, Employment and Assistance, Temporary Case File.

My Notifications | Menu | 1 - 5 of 6+ | Show More

The following invoices require attention. Invoices dated 7 days previous will be cancelled by the system.

Invoice #	Program Type	Service Provider	Invoice Date	Status
Invoice:1-9325460763 (Pending)	Autism	AUTISM BI SERVICES	2017-May-31	!
Invoice:1-9324401493 (Pending)	Autism	AUTISM BI SERVICES	2017-May-31	!
Invoice:1-9327046432 (Pending)	Autism	AUTISM, CHILD RECORD	2017-Jun-01	!
Invoice:1-9327019173 (Pending)	Autism	AUTISM, CHILD RECORD	2017-Jun-01	!
Invoice:1-9327359453 (Pending)	Employment and Assist...	CCS, CHILD RECORD	2017-Jun-01	!

- From the “Update an Invoice” link: enter details in the Search Invoices section and click “Search Invoices”. When the Invoice is located, click Update Invoice.



Update an Invoice

1 Search for an invoice you would like to update

Search Invoices

Program: Invoice #: Contact Last Name: Payment #:
 Service Provider: Invoice Date From: Contact First Name: Payment Amount:
 Status: Invoice Date To:

2 View your Invoice search results and Select the Invoice you would like to update

Search Results **Menu** **Update Invoice** 1 - 5 of 5+

Invoice #▲	Invoice Amount	Approval Date	Status	Payment Method	Payment Number	Payment Date	Payment Amount	Type	Service Provider	Invoice Date	Created By
1-9324401493	\$0.00		Pending !						Service Provider AUTISM BI SERVICES	2017-May-31	AFAGENCY1_QQQTWS
1-9325460763	\$0.00		Pending !						Service Provider AUTISM BI SERVICES	2017-May-31	AFAGENCY1_QQQTWS
1-9327019173	\$25.00		Pending !						Service Provider AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQQTWS
1-9327046432	\$60.00		Pending !						Service Provider AUTISM, CHILD RECORD	2017-Jun-01	DACHILDG_QQQTPEGG
JOSHtest	\$1,600.00		Pending !						Service Provider AUTISM, CHILD RECORD	2017-May-31	AFAGENCY1_QQQTWS

Menu No Records.

This will navigate to Step 1 of the invoice creation process

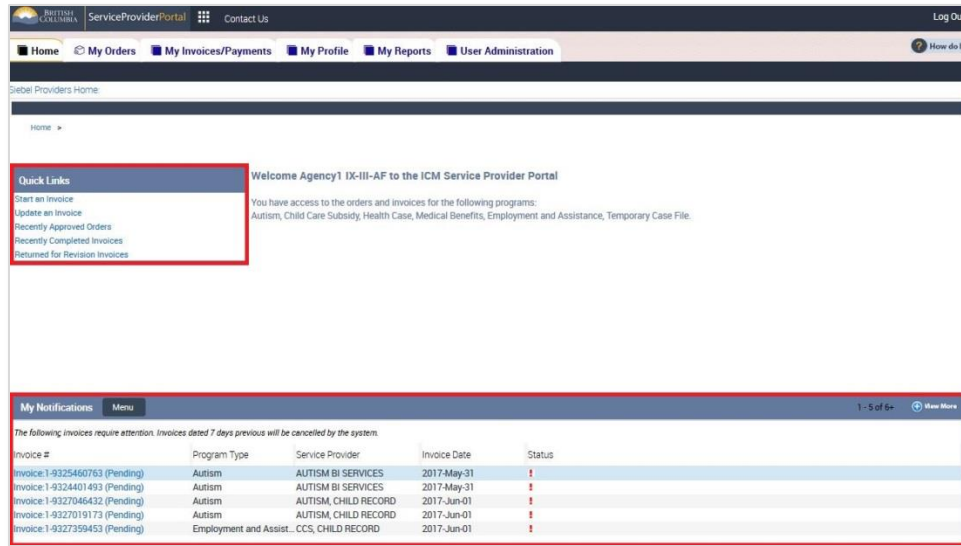
- To Cancel the Invoice, click “Cancel Invoice” at the bottom of the screen
- To Update the Invoice, enter invoice details and click “Next” to navigate through screens that are already fully completed.

If you need to update an Invoice that has already been submitted to the ministry, please contact Autism Funding to have the invoice Returned for Revision.

How to Search for Invoices

Quick Links

The Home screen of the Portal has Quick Links for common Invoice functions and searches including: Create an Invoice, Update an Invoice, Recently Paid Invoices, and Returned for Revision Invoices. The Home screen also includes the My Notifications section which includes invoices that are not complete.



Quick Links

- Start an Invoice
- Update an Invoice
- Recently Approved Orders
- Recently Completed Invoices
- Returned for Revision Invoices

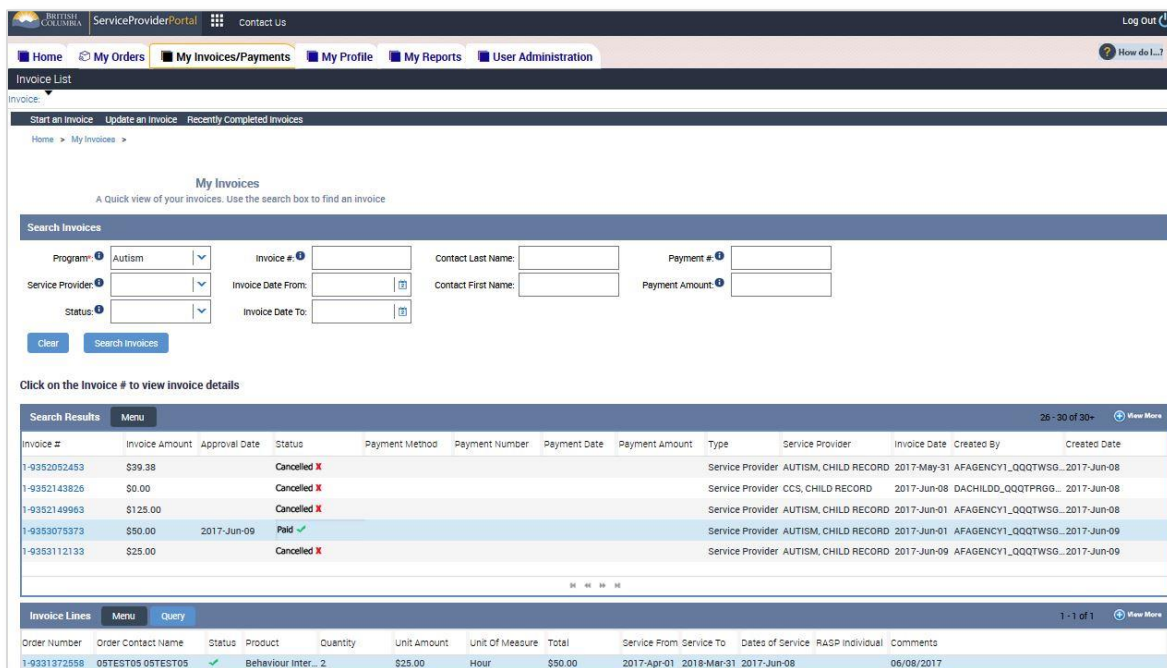
My Notifications

The following invoices require attention. Invoices dated 7 days previous will be cancelled by the system.

Invoice #	Program Type	Service Provider	Invoice Date	Status
Invoice: 1-9325460763 (Pending)	Autism	AUTISM BI SERVICES	2017-May-31	!
Invoice: 1-9324401493 (Pending)	Autism	AUTISM BI SERVICES	2017-May-31	!
Invoice: 1-9327046432 (Pending)	Autism	AUTISM, CHILD RECORD	2017-Jun-01	!
Invoice: 1-9327019173 (Pending)	Autism	AUTISM, CHILD RECORD	2017-Jun-01	!
Invoice: 1-9327399453 (Pending)	Employment and Assist...	CCS, CHILD RECORD	2017-Jun-01	!

Clicking the “Recently Completed Invoices” link will navigate you to the My Invoices/Payment screen and will display all of your paid Invoices (both created in the Portal and those submitted by mail, fax or email) with the most recently paid ones on top.

When you submit an Invoice to the Ministry in the Portal, it will be a few business days before the status changes to “Paid”. Invoices will be in “Paid” status once they are approved by the payment system and the payments generated a few days later. This means that you can see the date the payment will be made in advance of it being sent to you.



My Invoices

A Quick view of your invoices. Use the search box to find an invoice

Search Invoices

Program: Invoice #: Contact Last Name: Payment #:

Service Provider: Invoice Date From: Contact First Name: Payment Amount:

Status: Invoice Date To:

Click on the Invoice # to view invoice details

Search Results

Invoice #	Invoice Amount	Approval Date	Status	Payment Method	Payment Number	Payment Date	Payment Amount	Type	Service Provider	Invoice Date	Created By	Created Date
1-9352052453	\$39.38		Cancelled						Service Provider AUTISM, CHILD RECORD	2017-May-31	AFAGENCY1_QQQTWSG...	2017-Jun-08
1-9352143826	\$0.00		Cancelled						Service Provider CCS, CHILD RECORD	2017-Jun-08	DACHILDQ_QQQTPRGG...	2017-Jun-08
1-9352149963	\$125.00		Cancelled						Service Provider AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQQTWSG...	2017-Jun-08
1-9353075373	\$50.00	2017-Jun-09	Paid						Service Provider AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQQTWSG...	2017-Jun-09
1-9353112133	\$25.00		Cancelled						Service Provider AUTISM, CHILD RECORD	2017-Jun-09	AFAGENCY1_QQQTWSG...	2017-Jun-09

Invoice Lines

Order Number	Order Contact Name	Status	Product	Quantity	Unit Amount	Unit of Measure	Total	Service From	Service To	Dates of Service	RASP Individual	Comments
1-9331372558	05TEST05 05TEST05	✓	Behaviour Inter... 2		\$25.00	Hour	\$50.00	2017-Apr-01	2018-Mar-31	2017-Jun-08		06/08/2017

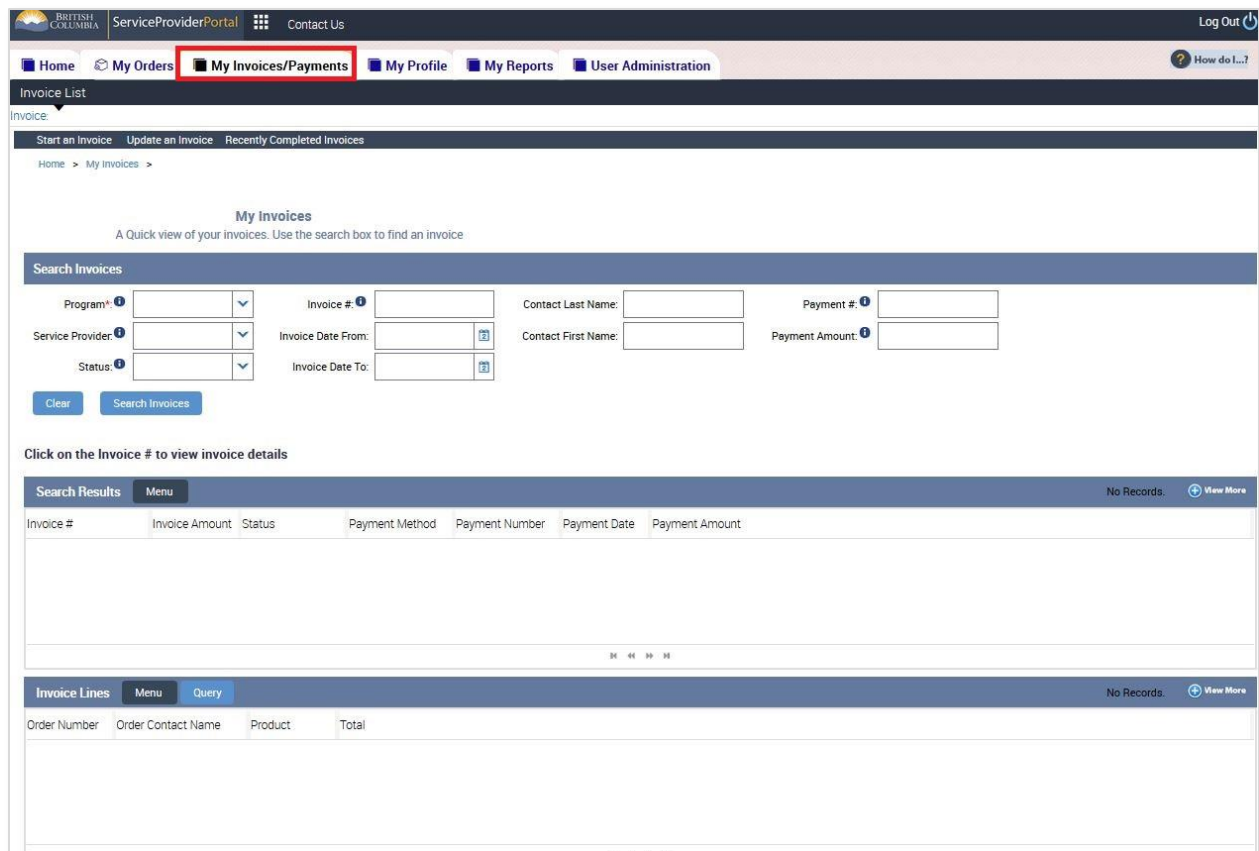
My Invoices/Payments screen

This screen allows you to view details about the Invoice and Payments.

The Invoice shows information including the amount of the Invoice, the Status of the invoice, and payment details. The Invoice Lines show the individual Total amounts and hours or days claimed for each child.

When you navigate to the My Invoices/Payments screen, there will be no results displayed until you enter what you want to see in the “Search Invoices” section. You must enter the Program Type but all other fields are optional.

Note: You can also rearrange the “Search Results” and “Invoice Lines” columns to appear how you would like. Simply click on a column and drag it to where you would like it to be.



BRITISH COLUMBIA ServiceProviderPortal Contact Us Log Out

Home My Orders **My Invoices/Payments** My Profile My Reports User Administration

Invoice List

Start an Invoice Update an Invoice Recently Completed Invoices

Home > My Invoices >

My Invoices
A Quick view of your invoices. Use the search box to find an invoice.

Search Invoices

Program: Invoice #: Contact Last Name: Payment #:
 Service Provider: Invoice Date From: Contact First Name: Payment Amount:
 Status: Invoice Date To:

Clear Search Invoices

Click on the Invoice # to view invoice details

Search Results Menu No Records. View More

Invoice #	Invoice Amount	Status	Payment Method	Payment Number	Payment Date	Payment Amount
No Records						

1 2 3 4 5 6 7 8 9 10

Invoice Lines Menu Query No Records. View More

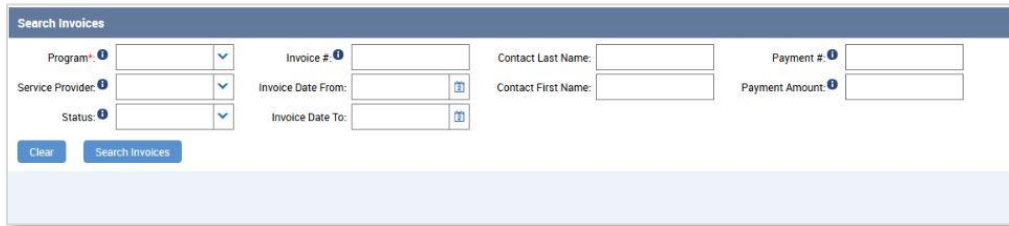
Order Number	Order Contact Name	Product	Total
No Records			

1 2 3 4 5 6 7 8 9 10

Searching for Invoices

In the My Invoices/Payments screen you can search for Invoices by entering details in the Search Invoices section. You must enter the Program Type but all other fields are optional.

- Service Provider: The Service Provider.
- Program Type: This is the ministry program. In this case, “Autism”.
- Invoice #: This is the Invoice Number attached to the Invoice.
- Status: You can search for any status. “Ready for Approval” means it was successfully submitted to the ministry. “Approved” means it was approved by the ministry and waiting for the payment system. “Paid” means it has been approved by the payment system and the payment will be generated a few days later.
- Invoice Date From/Invoice Date To: You can use this date range to search for invoices created on a specific date or in a date range. The date must be entered in YYYY-MMM-DD format, or selected using the calendar. The Invoice Date on an Invoice defaults to the date you created the Invoice unless you change the date while working on the Invoice.
- Payment #: If you receive a payment or remittance statement, you can use the Payment number on that statement to look up details about the payment.
- Payment Amount: The amount of the payment.



The screenshot shows a web form titled "Search Invoices". It contains several input fields: "Program" (a dropdown menu), "Invoice #" (a text field), "Contact Last Name" (a text field), "Payment #" (a text field), "Service Provider" (a dropdown menu), "Invoice Date From" (a text field with a calendar icon), "Contact First Name" (a text field), "Payment Amount" (a text field), "Status" (a dropdown menu), and "Invoice Date To" (a text field with a calendar icon). At the bottom left of the form are two buttons: "Clear" and "Search Invoices".

Example searches:

- To see only paid invoices: click the “Recently Completed Invoices” link on the Home screen, and then select the Status “Paid” in the Search Invoices section.
- To see if the Invoice just completed was submitted successfully: choose “Autism” in the Program Type field, and choose “Ready for Approval” in the Status field. (Note: if there are no results you may want to try again with “Approved” in the Status field).
- To see all invoices paid for a year: choose “Autism” in the Program Type field, enter the beginning date of the year in the Invoice Date From field and the end date of the year in the Invoice Date To field, and choose “Paid” in the Status field.

After you’ve selected what you are searching for, click the “Search Invoices” button.

Invoice Search Results

The Invoice Search Results will display Invoices that match your search. There are two sections in this view: Search Results and Invoice Lines. The Invoice Lines show details about whichever Invoice is selected.

- Invoice Search Results: The Invoice shows information including the amount of the Invoice, the Status of the invoice, and payment details.
- Invoice Lines: The Invoice Lines show details about each individual Order Line claimed including the child's name, Product (service provided), number of hours or days and the Total amount.

Search Results

Menu

1 - 5 of 9

View More

Invoice #	Invoice Amount	Approval Date	Status	Payment Method	Payment Number	Payment Date	Payment Amount	Type	Service Provider	Invoice Date	Created By
1-9324401493	\$0.00		Cancelled					Service Provider	AUTISM, CHILD RECORD	2017-May-31	AFAGENCY1_QQQTWS
1-9324401493	\$0.00		Pending					Service Provider	AUTISM BI SERVICES	2017-May-31	AFAGENCY1_QQQTWS
1-9325460763	\$0.00		Pending					Service Provider	AUTISM BI SERVICES	2017-May-31	AFAGENCY1_QQQTWS
1-9325460883	\$52.50		Ready For Approval					Service Provider	AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQQTWS
1-9327019173	\$25.00		Pending					Service Provider	AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQQTWS

<

1 2 3 4 5

>

Invoice Lines

Menu

Query

1 - 1 of 1

View More

Order Number	Order Contact Name	Status	Product	Quantity	Unit Amount	Unit Of Measure	Total	Service From	Service To	Dates of Service	RASP Individual	Comments
1-9293360742	Steve Austin		Behaviour Inter... 2		\$25.00	Hour	\$50.00	2016-Mar-01	2017-Feb-28	2017-Feb-15		

Viewing Invoice details

The Invoice Search Results displays up to five records but more may exist. The title bar of this section will indicate how many Invoices are displayed and how many there are in total (example: "1 - 5 of 10 +" means there are 5 Invoices displayed but over 10 in total). You can see the next set by clicking the arrow to the right. There is also a "View More" button in this section so you can see more Invoices on one screen.

Search Results Menu	1 - 5 of 9 View More
----------------------------------	-----------------------------------

The Invoices may be sorted in a particular field by clicking on the field

Search Results Menu											1 - 5 of 9 View
Invoice #	Invoice Amount	Approval Date	Status	Payment Method	Payment Number	Payment Date	Payment Amount	Type	Service Provider	Invoice Date	Created By
1-9324401493	\$0.00		Cancelled					Service Provider	AUTISM, CHILD RECORD	2017-May-31	AFAGENCY1_QQ
1-9324401493	\$0.00		Pending					Service Provider	AUTISM BI SERVICES	2017-May-31	AFAGENCY1_QQ
1-9325460763	\$0.00		Pending					Service Provider	AUTISM BI SERVICES	2017-May-31	AFAGENCY1_QQ
1-9325460883	\$52.50		Ready For Approval					Service Provider	AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQ
1-9327019173	\$25.00		Pending					Service Provider	AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQ

To view Invoice Line details for an Invoice, click the invoice number.

To view more details about the Invoice, or to print the Invoice, click on the Invoice Number. This navigates you to the “Invoice detailed view” that allows you to see details including all the Order Lines associated to the Invoice. You can then click the “Order Number” from here if you want to see more details about the Order.

Invoice detailed view
A detailed view of your invoice

Invoice

Program Type: Invoice Number: Organization: Comments:

Type: Invoice Date: Created By:

Service Provider: Invoice Amount: Created Date:

Payee: GST: Remittance Description:


Status: Payment Method: Approval Date:

Period:

Invoice Lines 1 - 3 of 3

Order Number	Order Contact Name	Status	Product	Quantity	Unit Amount	Unit Of Measure	Total	Service From	Service To	Dates of Service	RASP Individual	Comments
1-9293360742	Steve Austin	✓	Behaviour Cons...	5	\$100.00	Hour	\$500.00	2016-Mar-01	2017-Feb-28	2017-Feb-01		
1-9293360742	Steve Austin		Speech-langua...	5	\$125.00	Hour	\$625.00	2016-Mar-01	2017-Feb-28	2017-Feb-01		
1-9293360742	Steve Austin		Behaviour Inter...	19	\$25.00	Hour	\$475.00	2016-Mar-01	2017-Feb-28	2017-Feb-01		

To navigate back to the Invoices screen, use the links at the top of the screen (sometimes referred to as “Bread Crumbs”).

 **Service Provider Portal**

Invoice List

Invoice: 1-9320382351 | Invoice Line Items:

> > >

Invoice detailed view
A detailed view of your invoice

Payments

You will continue to receive payments in the same manner, either by Electronic Funds Transfer (EFT) deposited directly to your bank account, or by cheque via Canada Post.

To view Payments, you will need to locate the Paid Invoice. In the My Invoices/Payments screen you can search for Invoices by entering details in the Search Invoices section. You must enter the Program Type but all other fields are optional.

The Search Results will provide you with a list of your Paid Invoices and more detailed information, such as the Payment Method, Payment Number, Payment Date, and Payment Amount.

Invoice #	Invoice Amount	Approval Date	Status	Payment Method	Payment Number	Payment Date	Payment Amount	Type	Service Provider	Invoice Date	Created By	Created Date
1-9352052453	\$39.38		Cancelled						SERVICE PROVIDER AUTISM, CHILD RECORD	2017-May-31	AFAGENCY1_QQQTWSG...	2017-Jun-08
1-9352143826	\$0.00		Cancelled						SERVICE PROVIDER CCS, CHILD RECORD	2017-Jun-08	DACHILD0_QQQTPRG...	2017-Jun-08
1-9352149963	\$125.00		Cancelled						SERVICE PROVIDER AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQQTWSG...	2017-Jun-08
1-9353075373	\$50.00	2017-Jun-09	Paid						SERVICE PROVIDER AUTISM, CHILD RECORD	2017-Jun-01	AFAGENCY1_QQQTWSG...	2017-Jun-09
1-9353112133	\$25.00		Cancelled						SERVICE PROVIDER AUTISM, CHILD RECORD	2017-Jun-09	AFAGENCY1_QQQTWSG...	2017-Jun-09

You can also use the “Recently Completed Invoices” link from “Quicklinks” or at the top of the page in the My Invoices/Payment tab to quickly see a list of recently paid invoices.

How to Add New Users

About User Administration

When access to the Service Provider Portal is setup, one user is assigned the role of “Delegated Administrator”. This user has the ability to add, modify and remove access to the Portal for users in their organization.

BCeID Requirements

In order to add a new User to the Portal, they need to be added to the existing BCeID for your organization. Log into BCeID (www.bceid.ca) and add the new user under the “Manage Accounts” section. For support with this process, please contact the BCeID Help Desk phone number listed on their website.

User Administration in the Portal

The Delegated Administrator for your program can add, modify and remove access to the portal for users in your organization in the User Administration view of the My Profile screen.

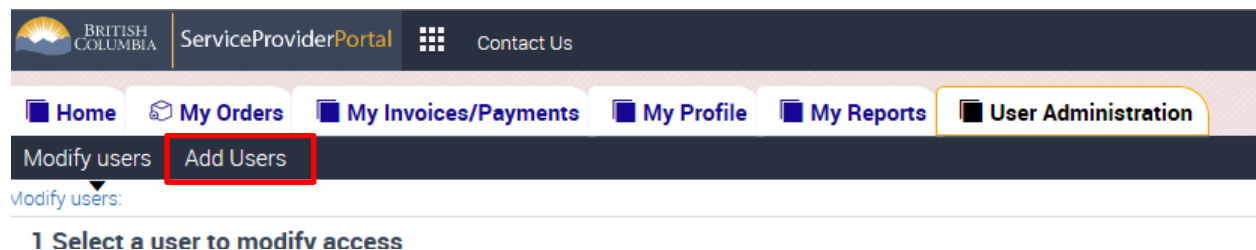
Navigating to the User Administration Screen

Click the “User Administration” tab at the top of the screen. From there, 2 screens are available:

- Modify user
- Add user

How to add a user to the Portal

To add a user, click on the ‘Add User’ link, located under the User Administration Tab.



You will then be navigated to the Add user screen, pictured below. The Add User Administration view displays all the BCeID users set up on your BCeID account.

[Home](#)
[My Orders](#)
[My Invoices/Payments](#)
[My Profile](#)
[My Reports](#)
[User Administration](#)

[Modify users](#)
[Add Users](#)

Add Users:

1 Select a user from the list below.

BCeID Users						
Last Name	First Name	Legal Name	Login	Mobile Phone #	Email	User Type
IX-III-AF	Agency1		AFAgency1	(250) 415-6589	lp@gov.bc.ca	Business
TEST	AF		ATEST4		@gov.bc.ca	Business
TEST	CCS		CTEST9		@gov.bc.ca	Business
DACHILDTESTA	TEST		DACHILDA		@gov.bc.ca	Business
DACHILDTESTB	TEST		DACHILDB		@gov.bc.ca	Business

2 Select a Service Provider/Facility this user needs to access.

Service Providers						
Service Provider	Doing Business As	Corporate Registry #	Parent Account	Address	City	Postal Code
AUTISM, CHILD RECORD	AUTISM, CHILD RECORD		FUNDING, AUTISM	5516 198 St	Langley	V3A 0A6
CCS, CHILD RECORD	CCS, CHILD RECORD		FUNDING, AUTISM	4093 216 St	Langley	V3A 0A1
FUNDING, AUTISM	AUTISM BI SERVICES			5430 201 St	Langley	V3A 0A2
MEDICAL BENEFITS, CHI...	MEDICAL BENEFITS, CHI...		FUNDING, AUTISM	5464 203 St	Langley	V3A 0A4

3 Select the Program to add to this user.

Program Areas	
<input type="checkbox"/>	Program Area
<input checked="" type="checkbox"/>	Temporary Case File
<input type="checkbox"/>	Child Care Subsidy
<input type="checkbox"/>	Medical Benefits
<input type="checkbox"/>	Health Case
<input type="checkbox"/>	Employment and Assistance

4 Submit the Request to Ministry

[Submit](#)

1. To add a user, highlight the BCeID user from the first table.

1 Select a user from the list below.

BCeID Users						
Last Name	First Name	Legal Name	Login	Mobile Phone #	Email	User Type
IX-III-AF	Agency1		AFAgency1	(250) 415-6589	...@gov.bc.ca	Business
TEST	AF		ATEST4		...@gov.bc.ca	Business
TEST	CCS		CTEST9		...@gov.bc.ca	Business
DACHILDTESTA	TEST		DACHILDA		...@gov.bc.ca	Business
DACHILDTESTB	TEST		DACHILDB		...@gov.bc.ca	Business

2. Select the Service Provider you want the BCeID user to have access to:

2 Select a Service Provider/Facility this user needs to access.

Service Providers Query						
Service Provider	Doing Business As	Corporate Registry #	Parent Account	Address	City	Postal Code
AUTISM, CHILD RECORD	AUTISM, CHILD RECORD		FUNDING, AUTISM	5516 198 St	Langley	V3A 0A6
CCS, CHILD RECORD	CCS, CHILD RECORD		FUNDING, AUTISM	4093 216 St	Langley	V3A 0A1
FUNDING, AUTISM	AUTISM BI SERVICES			5430 201 St	Langley	V3A 0A2
MEDICAL BENEFITS, CHI...	MEDICAL BENEFITS, CHI...		FUNDING, AUTISM	5464 203 St	Langley	V3A 0A4

3. Select the program areas you wish the BCeID user to have access to in the portal.

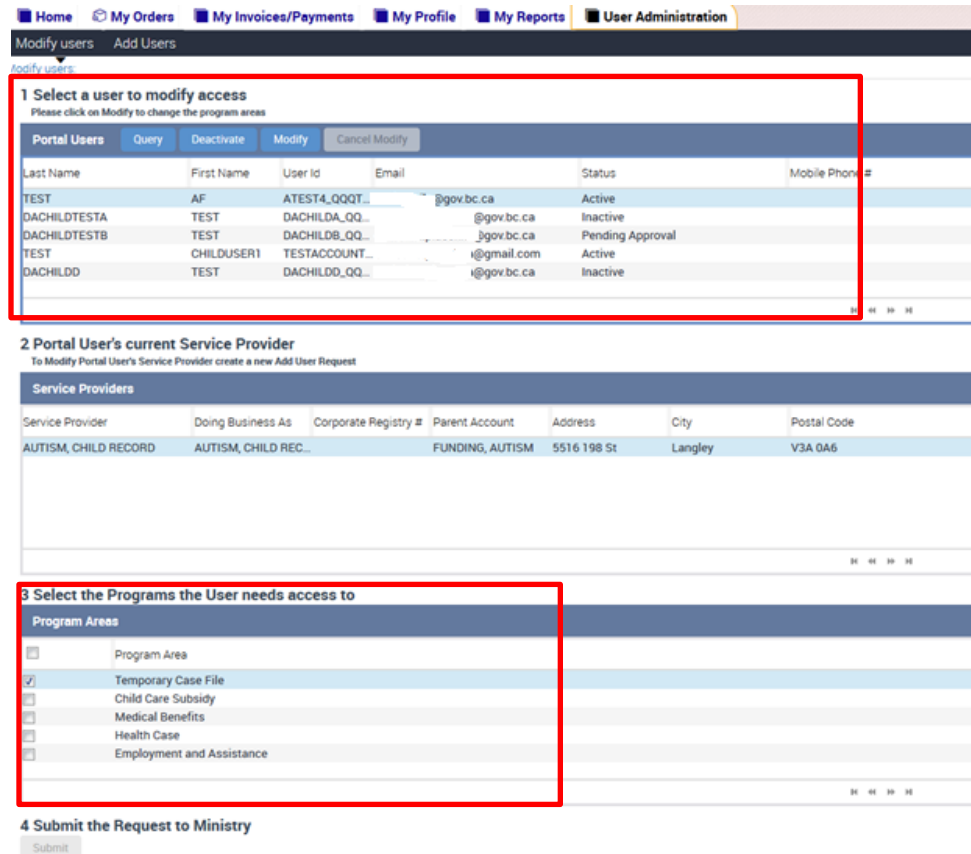
3 Select the Program to add to this user.

Program Areas	
<input type="checkbox"/>	Program Area
<input checked="" type="checkbox"/>	Temporary Case File
<input type="checkbox"/>	Child Care Subsidy
<input type="checkbox"/>	Medical Benefits
<input type="checkbox"/>	Health Case
<input type="checkbox"/>	Employment and Assistance

4. Click the Submit Button. The user will not have access to the Portal until the request is processed by the ministry. You will receive an email once your request has been processed.

Modifying Portal Access for a User

1. To modify a user's access to the portal, Navigate to the Modify screen under the User Administration tab.



1 Select a user to modify access
Please click on Modify to change the program areas

Portal Users Query Deactivate **Modify** Cancel Modify

Last Name	First Name	User Id	Email	Status	Mobile Phone #
TEST	AF	ATEST4_QQQT...	@gov.bc.ca	Active	
DACHILDTES	TEST	DACHILDA_QQ...	@gov.bc.ca	Inactive	
DACHILDTES	TEST	DACHILDB_QQ...	@gov.bc.ca	Pending Approval	
TEST	CHILDUSER1	TESTACCOUNT...	i@gmail.com	Active	
DACHILDO	TEST	DACHILDD_QQ...	i@gov.bc.ca	Inactive	

2 Portal User's current Service Provider
To Modify Portal User's Service Provider create a new Add User Request

Service Providers

Service Provider	Doing Business As	Corporate Registry #	Parent Account	Address	City	Postal Code
AUTISM, CHILD RECORD	AUTISM, CHILD REC...		FUNDING, AUTISM	5516 198 St	Langley	V3A 0A6

3 Select the Programs the User needs access to

Program Areas

Program Area
<input checked="" type="checkbox"/> Temporary Case File
<input type="checkbox"/> Child Care Subsidy
<input type="checkbox"/> Medical Benefits
<input type="checkbox"/> Health Case
<input type="checkbox"/> Employment and Assistance

4 Submit the Request to Ministry
Submit

2. All the current Portal users associated to your organization will be listed in the first table. Select the one you wish to modify, and Click the 'Modify' button. A warning message will pop up stating that the user's access to the portal will be temporarily suspended until the request is complete.
3. Select which program for which you wish to modify the user's access.
4. Click the Submit button. Your request will be sent to the Ministry for processing.

Removing Portal Access for a User

1. To remove a User's access to the Portal, navigate to the modify access view under the User administration tab.
2. Highlight the Portal user, and click the "Deactivate" button. Only those with a status as 'Active' can be deactivated. A warning message will pop-up stating that deactivating will remove the user's Portal access immediately.
3. Click 'Ok', and the portal user's access will be removed immediately.

Portal Users				
Query Deactivate Modify Cancel Modify				
Last Name	First Name	User Id	Email	Status
TEST	AF	ATEST4_QQQT...	@gov.bc.ca	Active
DACHILDTESTA	TEST	DACHILDA_QQ...	@gov.bc.ca	Inactive
DACHILDTESTB	TEST	DACHILDB_QQ...	@gov.bc.ca	Pending Approval
TEST	CHILDUSER1	TESTACCOUNT...	@gmail.com	Active
DACHILDD	TEST	DACHILDD_QQ...	@gov.bc.ca	Inactive

Once you have deactivated a user in your BCeID account, they will not be able to access the Portal. You will need to follow the 'Add user' process to reactivate them.

Changing the Delegated Admin

If you need to change the Delegated Admin for your organization, please contact the ministry program. The existing Delegated Admin will be able to follow the steps above to add the new user, but they will not be able to give them the Delegated Admin role to be able to add and remove users. There can be only one Delegated Admin for your business.

Portal Frequently Asked Questions (FAQ)

Access and Navigation Frequently Asked Questions (FAQ)

Q: I am an individual providing services. Does the “Business BCeID” apply to me? Do I need to register my business name with the BC Corporate Registry?

A: The “Business BCeID” type of BCeID is required for accessing the Portal because the ministry requires that your personal or business organization’s unique identity must be verified. Even if you do not have a registered business, you are acting in a business capacity as an authorized representative of the business. Business BCeID may be used by representatives of companies, partnerships, sole proprietorships or organizations including municipalities and not-for-profit societies. An individual providing services who does not have a registered company is typically considered a “Sole Proprietorship”.

You do not need to register your business name with the BC Corporate Registry if you are a Sole Proprietorship, Partnership, First Nations Government, Local Government or Public Institution. If you are a company or society you must be also in good standing with the BC Corporate Registry.

Q: What if I have forgotten my BCeID or password?

A: If you have forgotten your BCeID or password, please contact the BCeID Help Desk at 1-888-356-2741 (8:30 a.m. – 5:00 p.m., Monday to Friday, excluding statutory holidays). Or go directly to the BCeID website at www.bceid.ca and click Logon. From the Logon screen, you can request your information by clicking Forgot My BCeID or Forgot My Password.

Q: I’m searching for an Order. Do I put my name in as the “Contact”?

A: If you hover over the information icon, it will describe what this field means. The “Contact” is the child.

Order Frequently Asked Questions (FAQ)

Q: I was informed that a Request to Pay Service Providers/Suppliers form was submitted and approved but I cannot locate the Order in the Portal. What do I do?

A: Please contact Autism Funding

Toll free in BC 1-877-777-3530

Greater Victoria area only (250) 387-3530

Service Provider Portal specific questions can be emailed to:

MCF.ServiceProviderPortal@gov.bc.ca

Program Email: MCF.AutismFundingUnit@gov.bc.ca

Q: There are approved Orders with remaining amounts for children who are no longer receiving services with me, how do I get them cancelled?

A: The parent should inform Autism Funding of any changes to their funding such as child ending services with you. If the child is no longer receiving services, do not bill for those Orders. You or the parent may contact Autism Funding to request the Orders be cancelled.

Q: Can I see Orders for products such as equipment?

A: In the Portal you can see all Orders and Order lines for all products and services approved with you. You cannot submit invoices in the Portal for products such as equipment.

Invoice Frequently Asked Questions (FAQ)

Q: I got an error message when submitting an Invoice, how do I know if it was received?

A: To see if the Invoice just completed was submitted successfully go to the My Invoices/Payments screen and search for the Invoice. If the invoice is in “Ready for Approval”, “Approved” or “Paid” Status then it was received successfully by the ministry. If it is in another Status, such as “Pending” or “Cancelled”, then it has not been received by the ministry.

In the Search Invoices section:

- Choose “Autism” in the Program Type field, and enter the Invoice number in the Invoice # field

Q: How do I print Invoices?

A: There is no print feature built into the Portal so you will use the print features on your internet browser. You may want to use Print Preview before printing and adjust the print settings so the Invoice prints on one page.

You can print from the Confirmation page when you submit an Invoice or search for the Invoice at any time. The best view to print from is the Invoice Detailed view as it shows all the Order Lines associated to the invoice. To see this view, search for the invoice and then click on the Invoice Number in the Search Results section of the My Invoices/Payments screen.

Q: How can I practice creating an Invoice?

A: The Portal is used for transactions so there is no ability to complete a practice Invoice.

Q: I have submitted the Invoice and need to make changes to it. How can I get it back?

A: Contact Autism Funding as soon as possible. We may be able to return the Invoice to you for revision.

Q: Is there any difference in what I can see or bill for between submitting paper invoices versus Portal Invoices? Is there any risk that I would be able to bill too high an amount?

A: There is no difference in what you can see or what you can bill for by using the Portal to submit Invoices instead of submitting a paper Invoice.

In accordance with Freedom of Information and Protection of Privacy legislation, individuals authorized to access the Portal are able to see information pertaining to all the children for whom your organization is authorized to provide services. This information is the same as what you currently receive in paper format (e.g. the name of the individual receiving service or the amount and types of service authorized).

Parents choose the services they need and the service providers, and notify Autism Funding using a Request to Pay Service Providers/Suppliers form. After the form is reviewed a letter is sent to both the parent and the service provider that includes a billing number. Invoices in the Portal cannot be completed for more than the amount approved based on the Request to Pay.

There are validations in the Portal to calculate amounts correctly. All Invoices are reviewed by ministry staff prior to being approved for payment.

Q: I got a notification that the parent/guardian has requested to sign the invoice before it is submitted and I cannot continue. Can this be done in the Portal?

A: No. As the parent/guardian has requested to sign the invoice, please submit an invoice by mail, fax or email.

Q: I'm creating an invoice but I don't see any buttons and I can't scroll. What is causing this?

A: The most likely cause of this issue is trying to use the Portal on a mobile device or using a browser that isn't supported for the Portal. To use the Service Provider Portal, it is recommended you use one of the following operating systems and Internet browsers:

Operating Systems:

- Windows Vista (32 bit)
- Windows 7 (32 bit)

Browsers:

- Internet Explorer (version 11)
- Google Chrome (version 58+)
- Firefox ESR 32bit (45+)

Q: I am trying to submit an Invoice for an Order Line that I know I haven't billed on yet but I can't find it on Step 2 of the Create Invoice process to add it to the Invoice. What do I do next?

A: If the Order Line is already associated to another Invoice and an amount is saved, you may not be able to add the Order Line to another Invoice. Check for any other pending Invoices and either complete or Cancel those invoices.

If this does not resolve the issue, and you have been informed that the Order Line is approved for the child, please call Autism Funding.

Q: Can I add more than one "Dates of Service" to the Invoice?

A: Yes. After adding a date of service, click the "Add new date" button again to repeat the steps and add another date. Only one date displays on the final Invoice screen, but all Dates of Service for the Invoice can be viewed in the "Order and Invoice Summary Report".

Q: Where can I find information about payments and other Autism Funding program information?

A: Please visit Autism Funding website at:
http://www.mcf.gov.bc.ca/autism/funding_programs.htm.

Q: The Invoice Status is "Paid" but I have not yet received a payment, what does this mean?

A: When you submit an Invoice to the Ministry, it will be a few business days before the status changes to "Paid". Invoices will be in "Paid" status once they are approved by the payment system and the payments generated a few days later. This means that you can see the date the payment will be made in advance of it being sent to you.

If there are no payment details on the Invoice yet, they are usually populated one business day after the status changes to Paid. If there are payment details on the Invoice, the payment will be made on the Payment date. For Electronic Funds Transfer (EFT) the funds will be transferred to your account on the Payment Date but your bank may require additional time to display the payment to you. For Cheque (CHQ) payment, please allow up to 10 business days for Canada Post mailing times.

Q: I received a payment from Autism Funding but I don't know what invoice it is for, is there a way to look it up in the Portal?

A: In the My Invoices/Payments tab, you can search using the Payment #. This is number will be on the remittance statement you received with the payment.

If you cannot locate an Invoice after entering this Payment number you can call Autism Funding for assistance.

User Administration Frequently Asked Questions (FAQ)

Q: My Organization changed managers. We created the new BCeID for the new manager but the new manager cannot login to the Portal. How do we get Portal access for the new manager?

A: Adding a new User in BCeID does not automatically give that user access to the Portal. The person who is the Delegated Admin for the Portal for your organization can log into the Portal and follow the instructions for Adding Portal Access for a User. If the person who is the Delegated Admin has also changed, please contact the ministry program.

Q: Does BCeID require the additional users to go into an office to show identification?

A: As you are creating additional users under your existing BCeID account, the process is simpler than creating a new BCeID account. If you have any questions about the process, please contact the BCeID Help Desk listed on their website (www.bceid.ca).

Q: If I add a new user to the Portal, what can they see and do?

A: When you give a User access to the Portal for your organization the User can see and do everything in the Portal that you can, except adding and removing other users. The User can see all Orders, Invoices and Payments and the User can create and submit Invoices.

Q: I added a new user to the Portal but the new User cannot log into the Portal. What does this mean?

A: The user cannot access the Portal until their Status is “Active”. If you have clicked the “Activate” button when adding the new User and the Status is “Authorized” this means that the access request requires ministry review. The access should be set up in a few days. If there is a status other than “Active” or “Authorized” you may have to click the “Activate” button again. If you require additional support in this area, please contact the ministry program.

Autism Funding Contact Information

Telephone Numbers	Toll Free in BC 1-877-777-3530 Greater Victoria area only (250) 387-3530
Fax Number	(250) 356-8578
Mailing Address	Autism Funding PO Box 9776 Stn Prov Govt Victoria BC V8W 9S5
Website	http://www.mcf.gov.bc.ca/autism/funding_programs.htm Portal Information: http://www.mcf.gov.bc.ca/autism/pdf/afb_portal_info_sheet.pdf Portal Login link: https://icm.ext.gov.bc.ca/epsportal_prd
Email	Service Provider Portal specific questions can be emailed to: MCF.ServiceProviderPortal@gov.bc.ca Program Email: MCF.AutismFundingUnit@gov.bc.ca

(July 2017)