Welcome to the
ICM Service Provider Portal

Table of Contents

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.

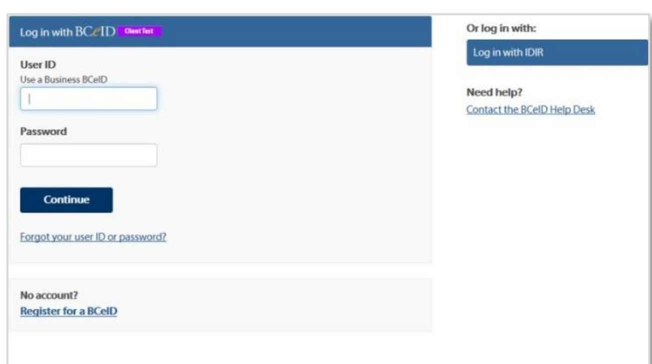
Navigating the Service Provider Portal

Log in to the Service Provider Portal

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

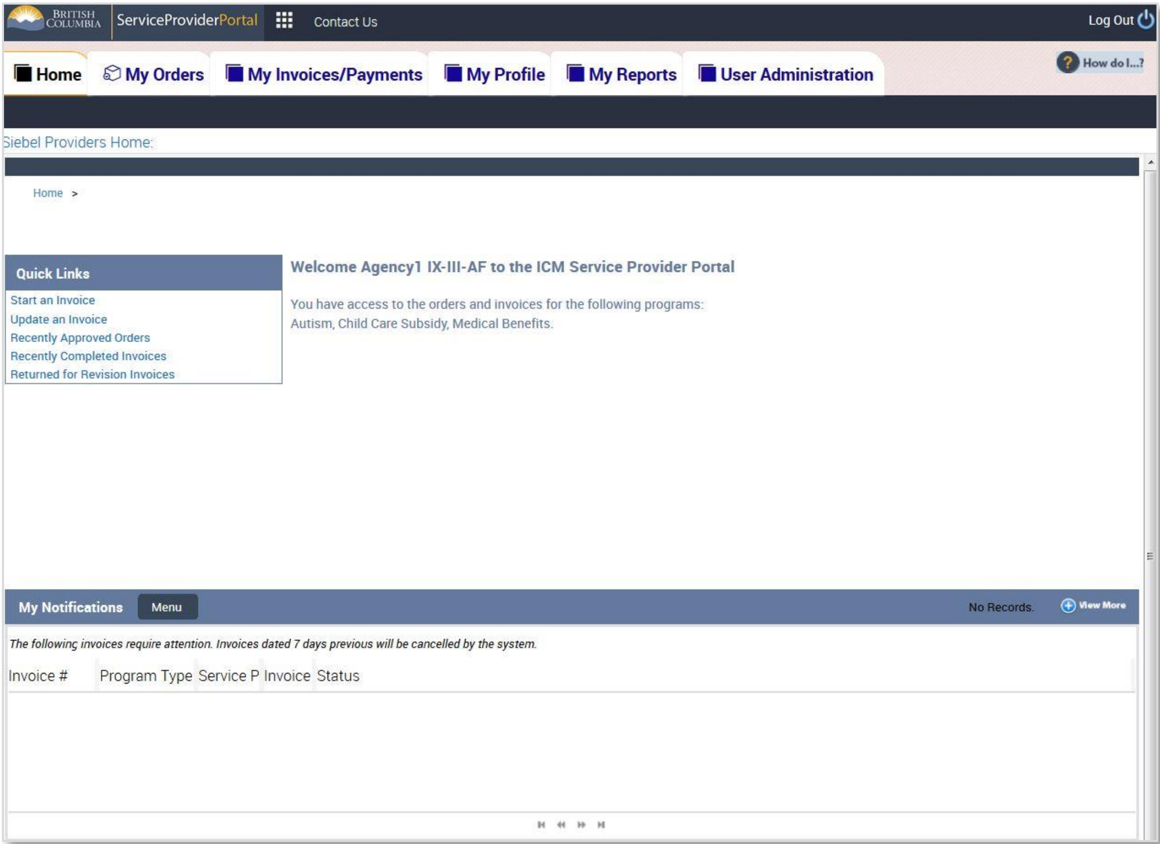
Enter your Business BCeID user name into the BCeID field. Enter your Business BCeID password into the Password field. Press 'Continue'.

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



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.



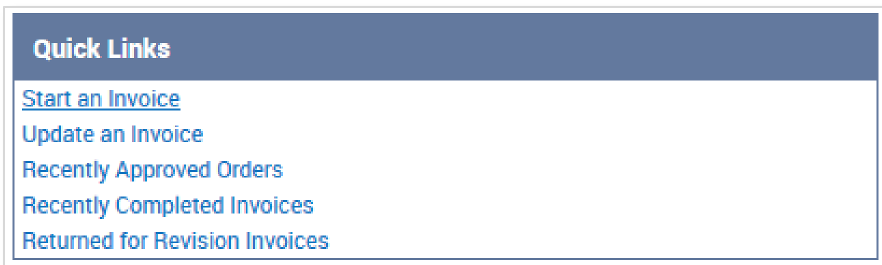
The Welcome message located in the centre of your screen informs you of:

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

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:

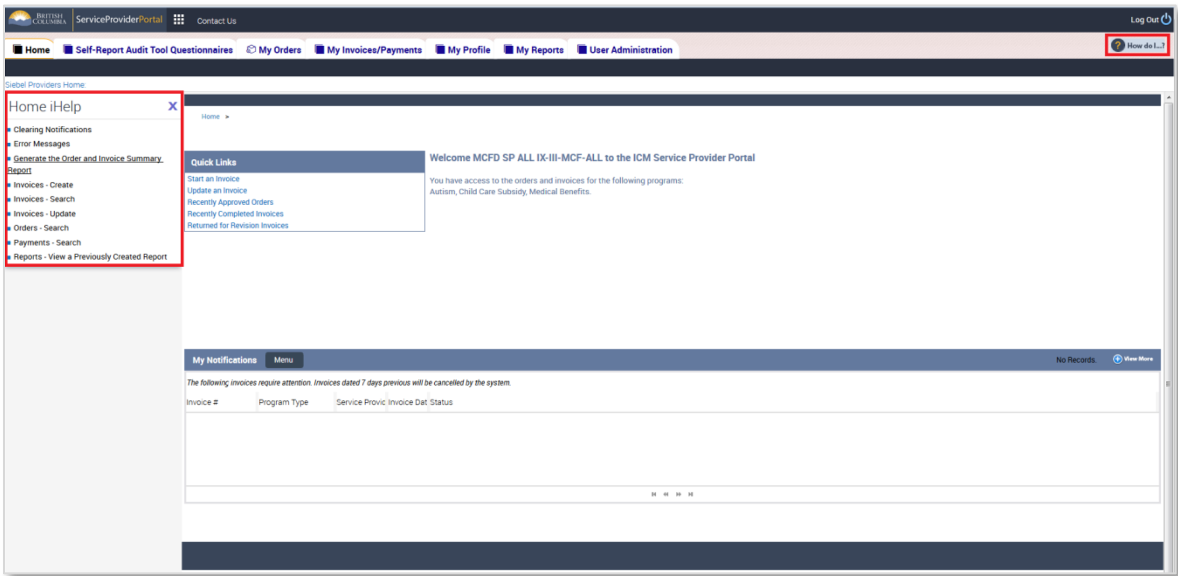
- Invoices requiring action – you can access the invoice by clicking on the Invoice Number.

iHelp and Information Icons

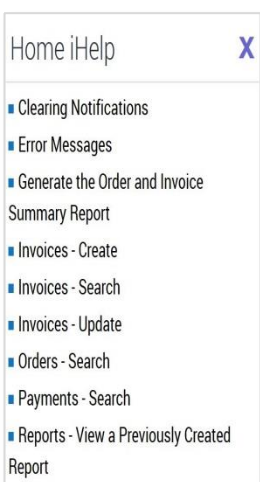
Accessing iHelp

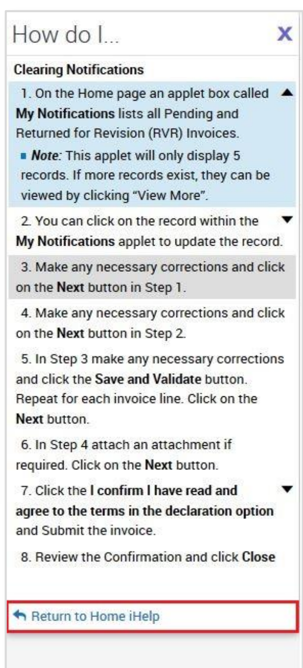
The Portal has iHelp topics that can be accessed by clicking the “How do I …?” icon located along the top far right corner of your Home Screen.

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:

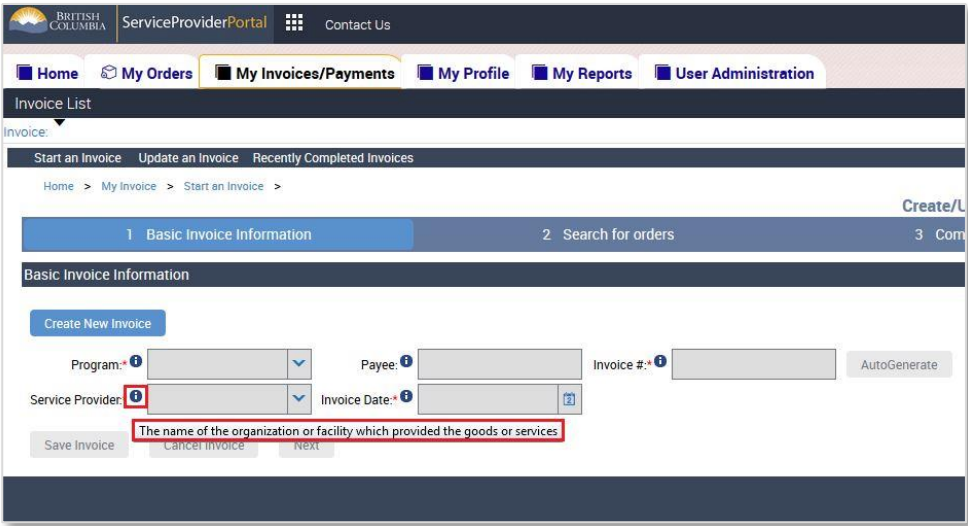




- Clearing Notifications
- Run the Order and Invoice Summary Report
- Create an Invoice
- Search for an Invoice
- Update an invoice
- Search for an Order
- Search for a Payment

Information Icons

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



Screens/Views

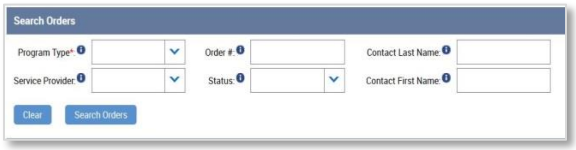
Across the top of the screen are five tabs that provide easy navigation to:

- 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.

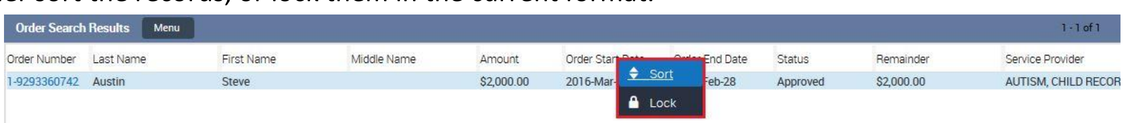
Searching, Viewing and Sorting

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.



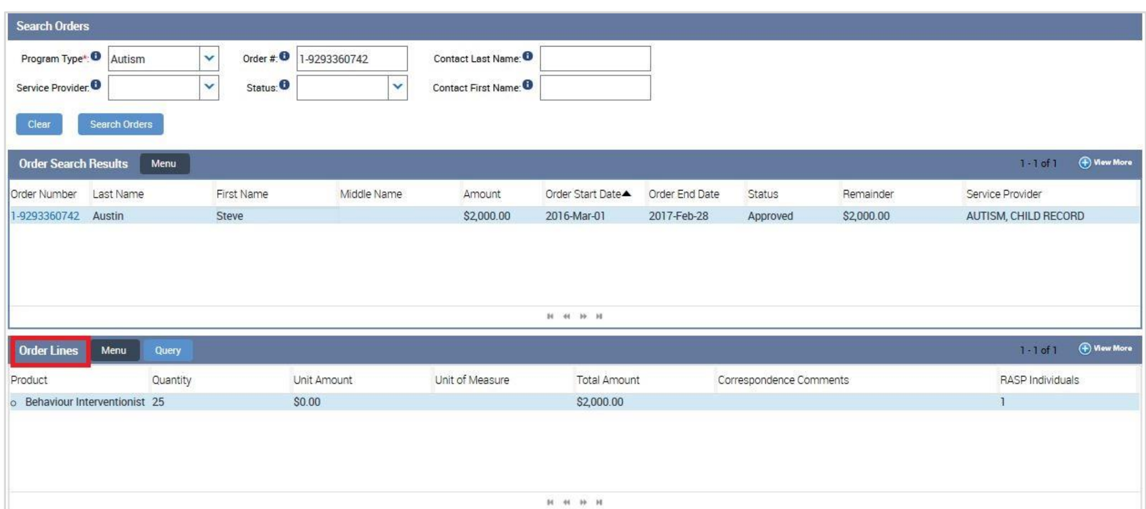
The Search Results displays up to five records but more may exist. The title bar of this section will indicate how many records are displayed and how many there are in total (example: "1 - 5 of 10 +" means there are 5 records displayed but over 10 in total). You can see the next set by clicking the arrow 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.

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.



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.

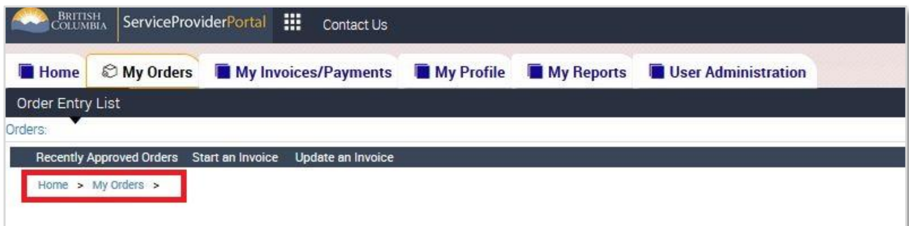


To view more details about the record, click on the Order or Invoice Number. This navigates you to a detailed view.

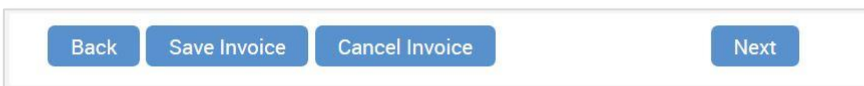
Navigating Through Screens

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.

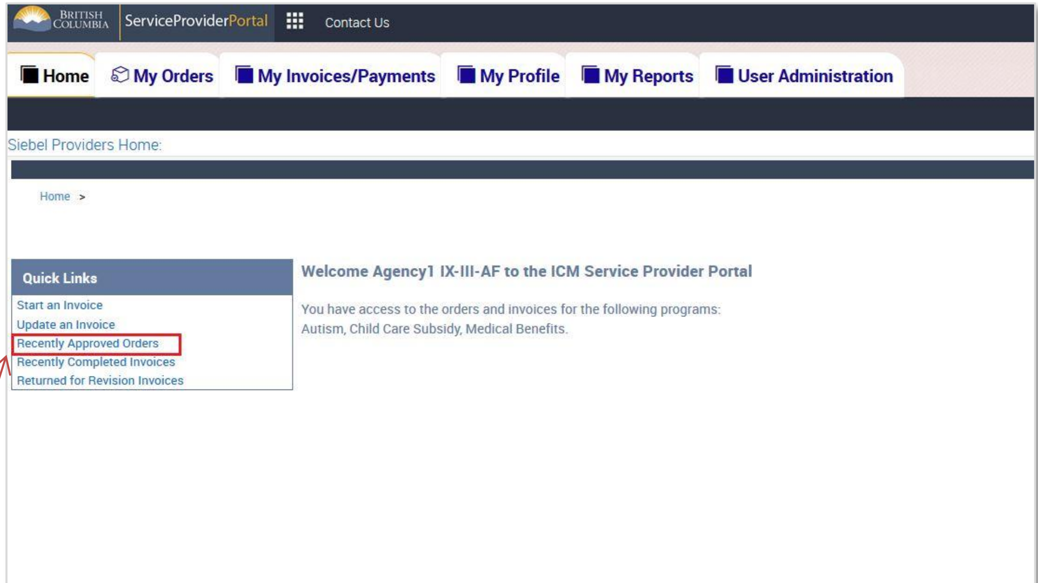
The authorization number is called an "Order" in the Service Provider Portal.

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

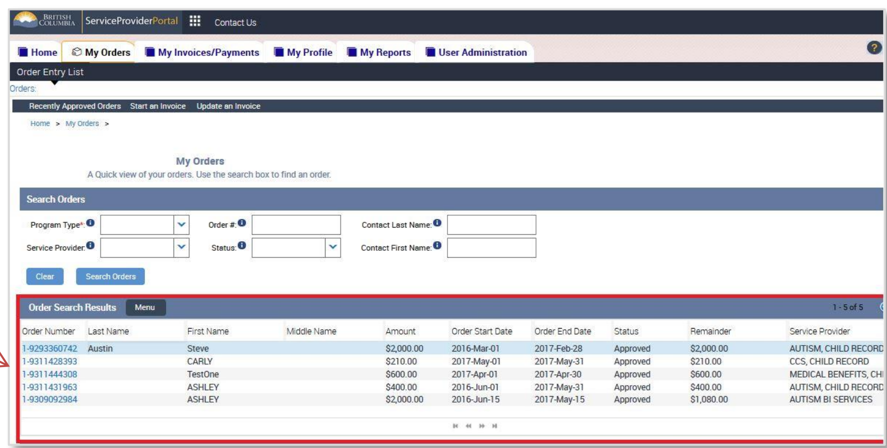
The Home screen of the Portal has Quick Links to view “Recently Approved Orders.”



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.



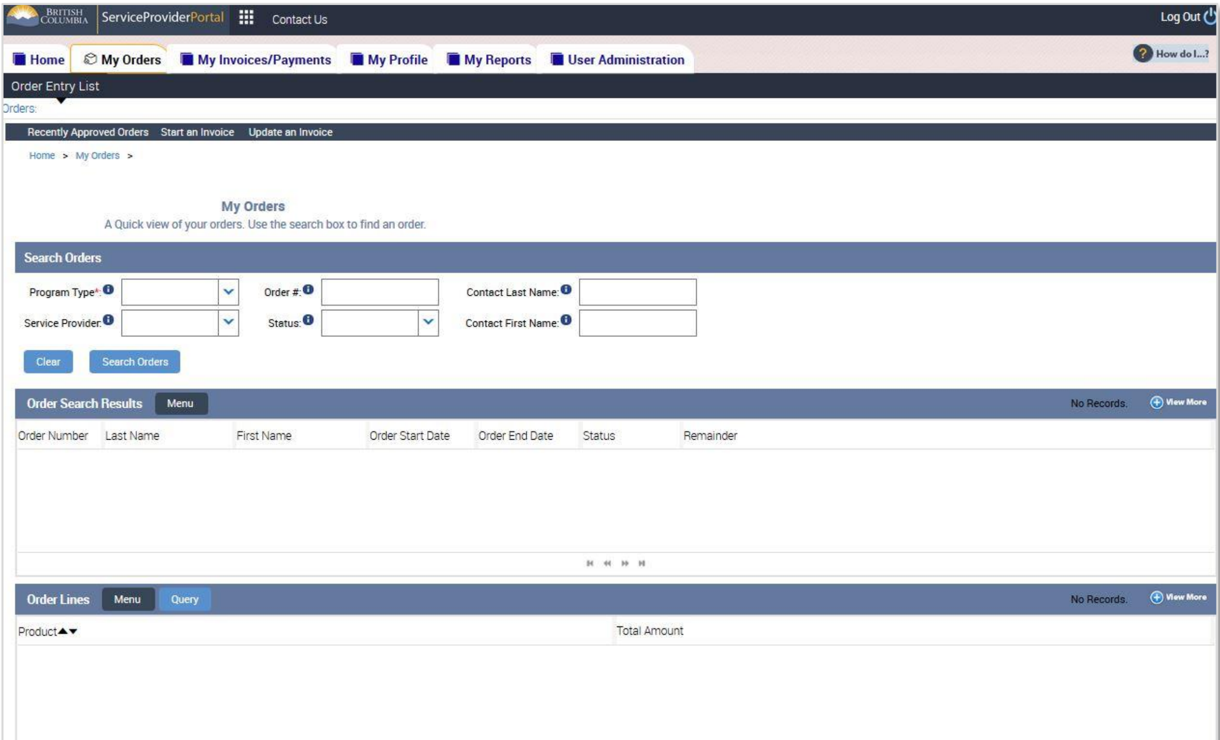
My Orders screen

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.

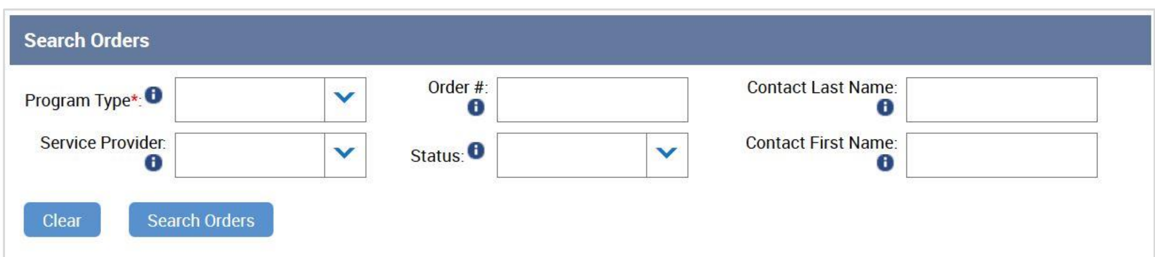
ICM Integrated Case Management



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.



Example searches:

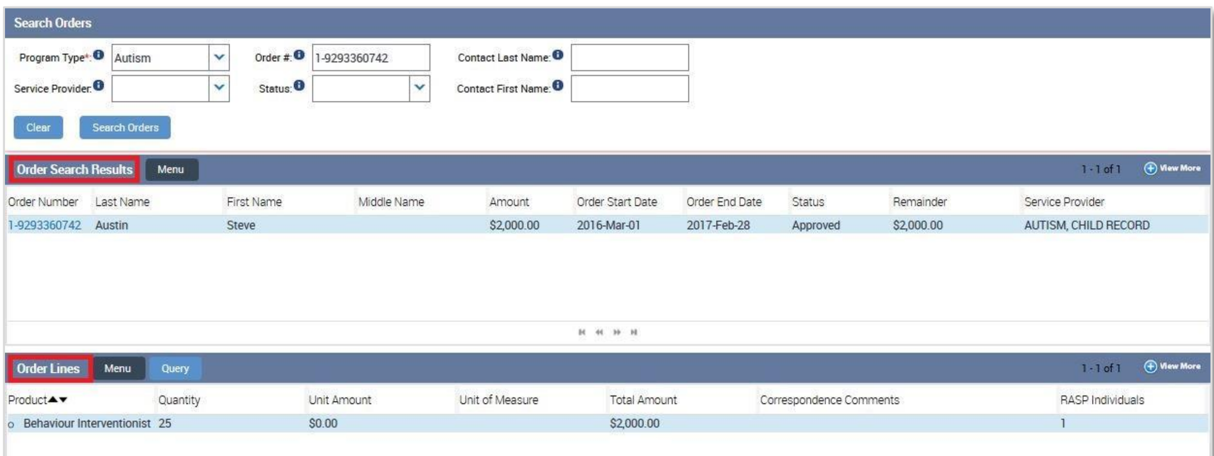
- To see just the most recently approved Orders: click the "Recently Approved Orders" link on the Home screen or at the top of the My Orders screen
- To see the details of an Authorization: choose "Autism" in the Program Type field, and enter the Authorization Number the Order # field.
- To see the order 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.



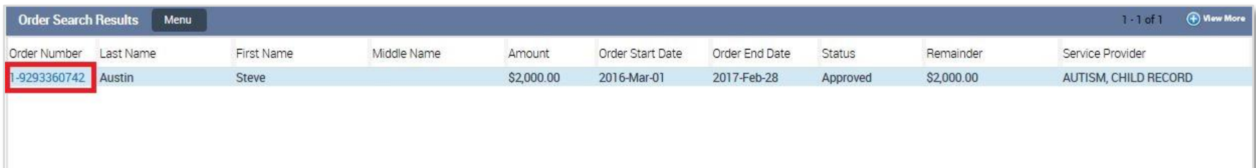
Viewing Order details

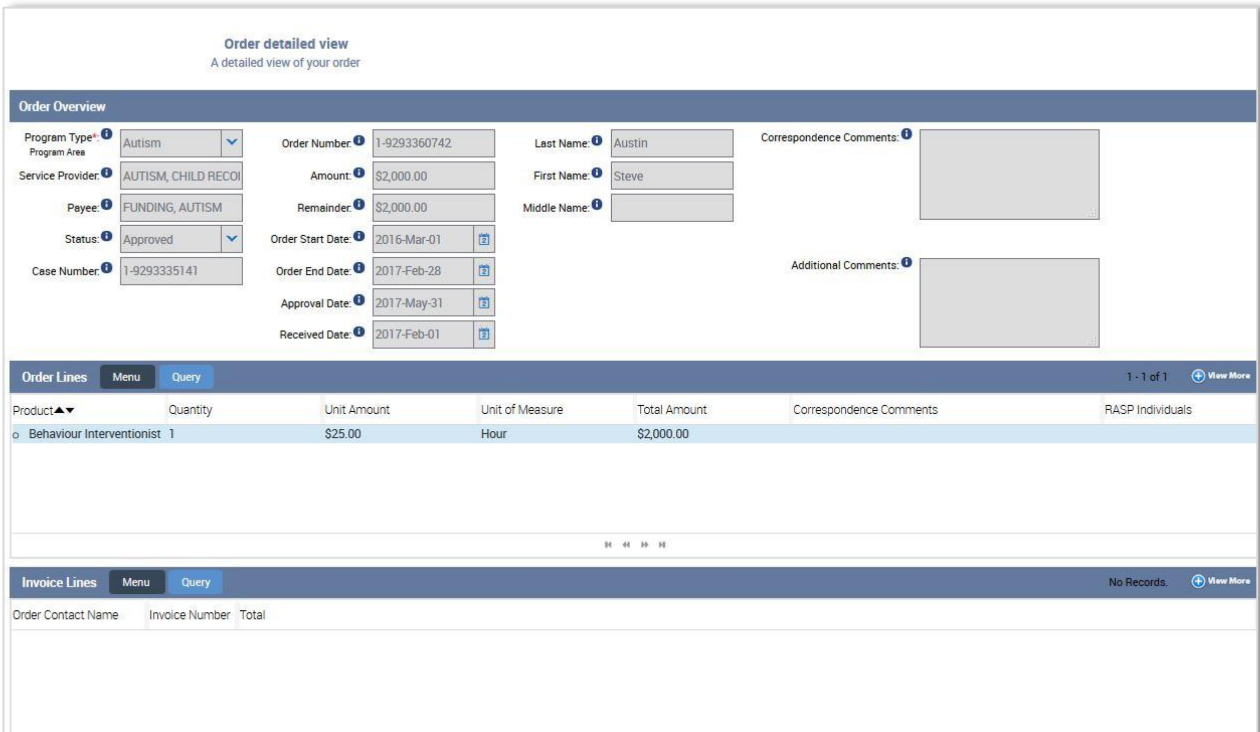
The Order Search Results displays up to five orders but more may exist. The title bar of this section will indicate how many Orders are displayed and how many there are in total (example: "1 - 5 of 10 +" means there are 5 Orders displayed but over 10 in total). You can see the next set by clicking the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

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".

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.



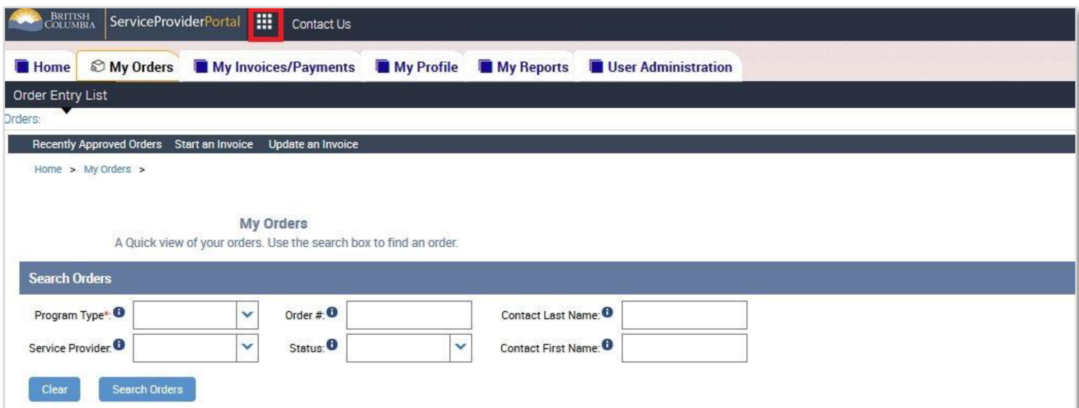


Reports

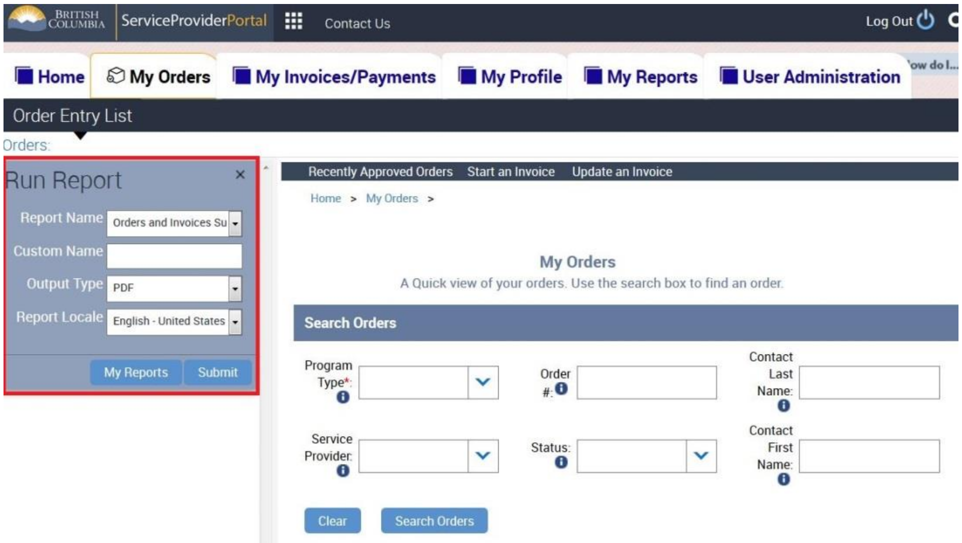
There is one report available called the "Orders and Invoices Summary Report." This Report allows you to see all the details of the Order and Order Lines and all the Invoices attached. The report includes information such as the name of the RASP Individuals and all of the Dates of Service billed on each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



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.

BRITISH COLUMBIA

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

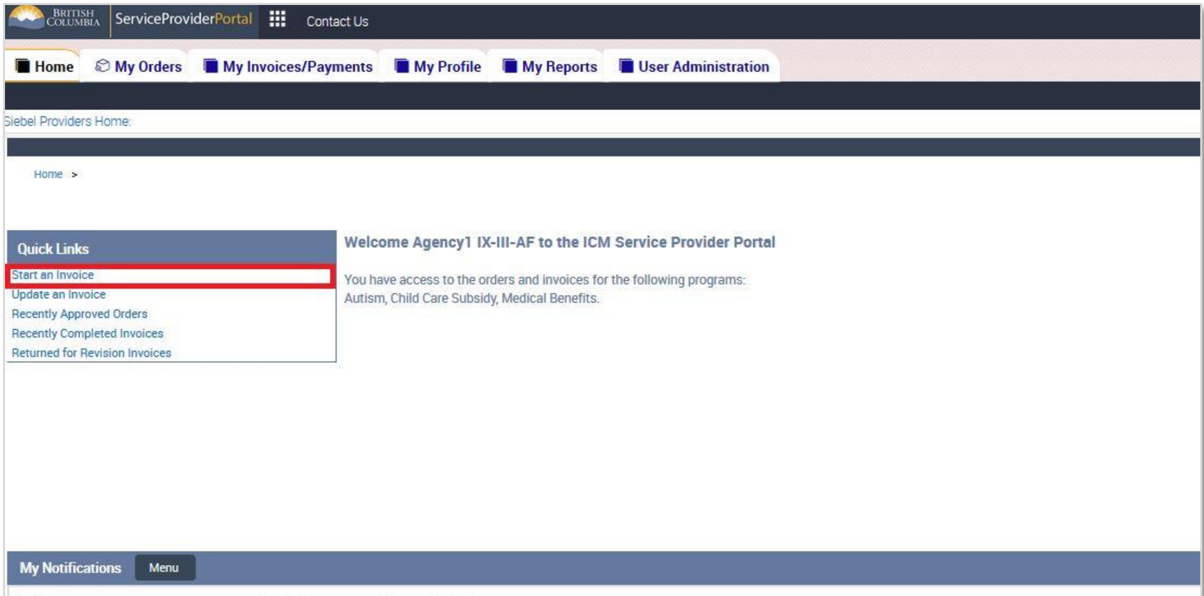
About Invoices

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".

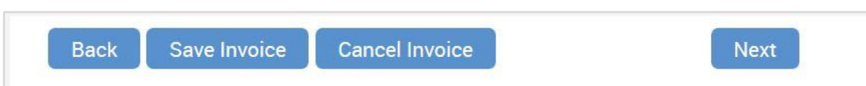


Clicking the “Start an Invoice” link creates a new Invoice and navigates you to the first step in the Create/Update an Invoice process.

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.

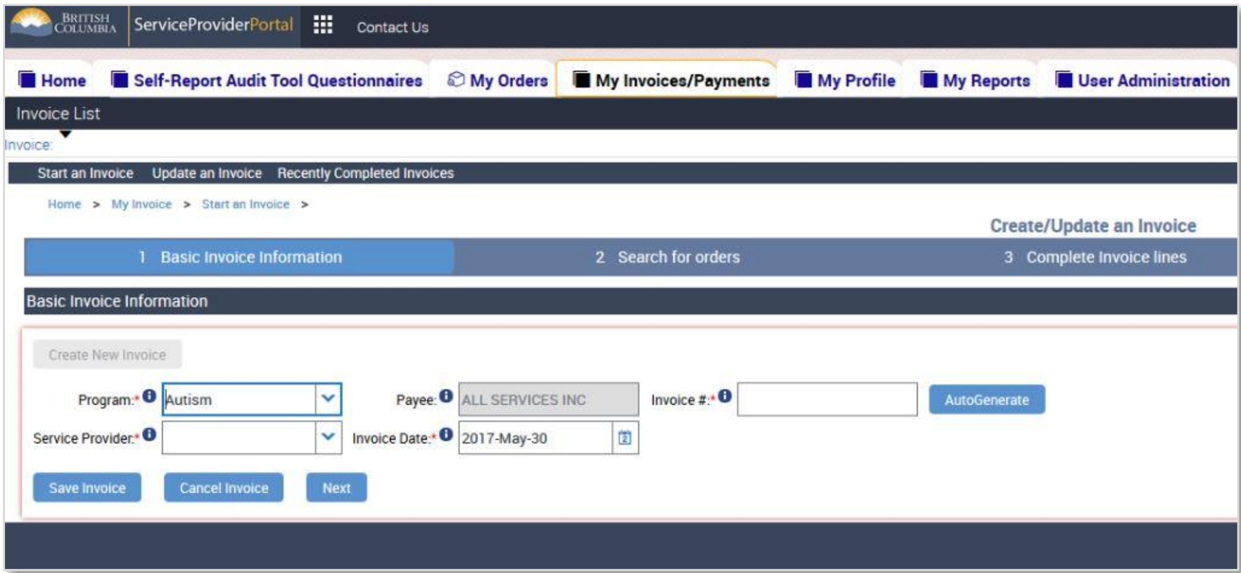


Note: The Invoice is automatically saved when you click “Next”. The “Save Invoice” button only needs to be used if you want to save your progress and return to the Invoice at a later time to complete it.

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.

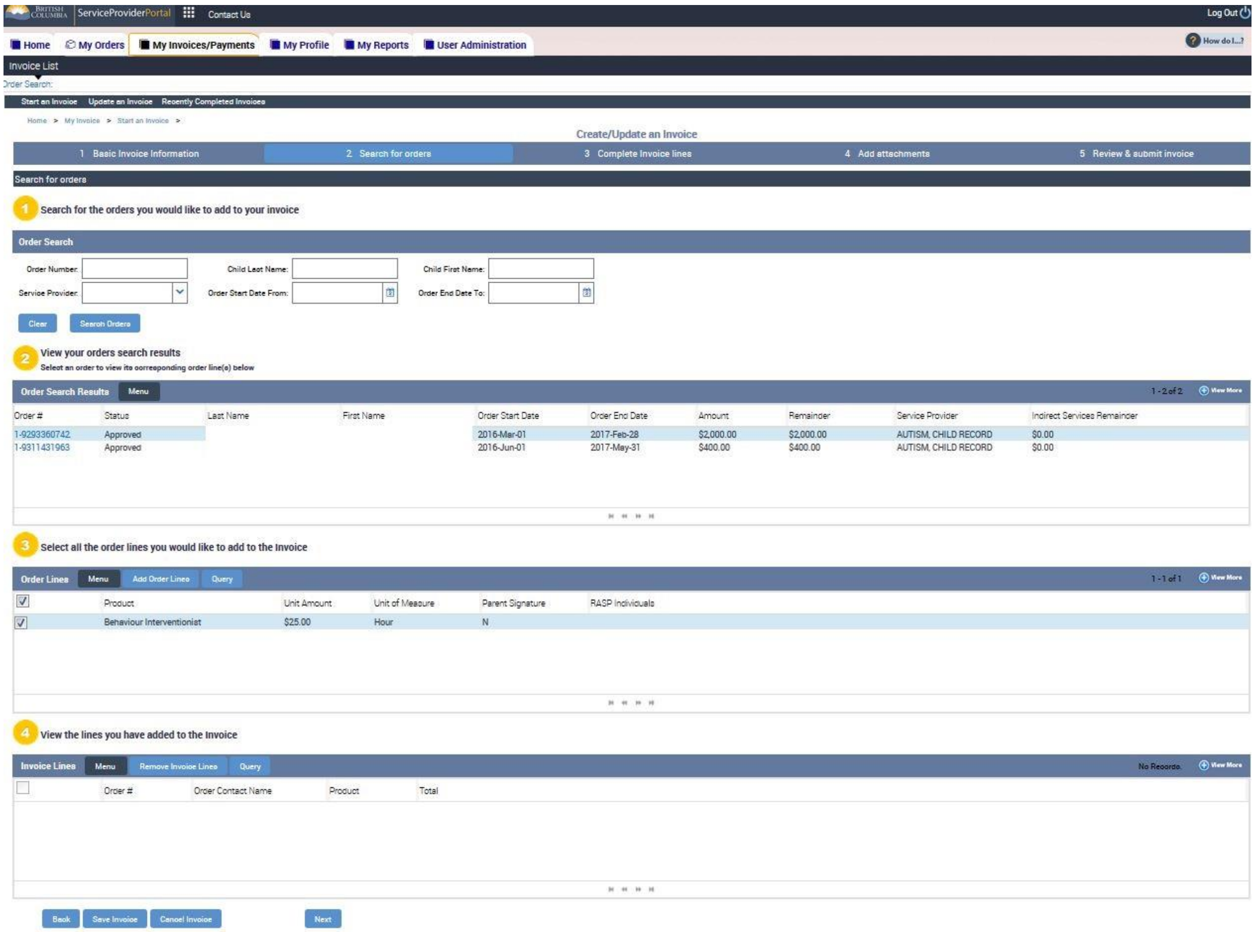


- Program: The ministry case type associated to the Invoice (Autism).
- Payee: The organization or individual to receive payment from the ministry. The payee cannot be changed in the Portal; it is set by the ministry based on your organization structure.
- Service Provider: The Service Provider.
- Invoice #: 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.



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

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

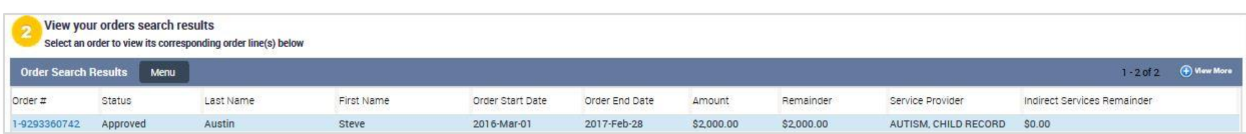
- Order Number: Commonly known as the Authorization Number
- Child Last Name/Child First Name: The child's name

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

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

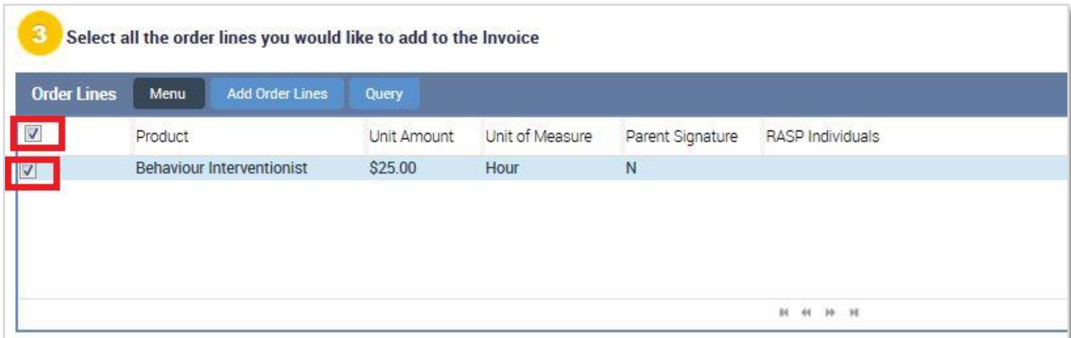
Section 2: View your order search results;

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.



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

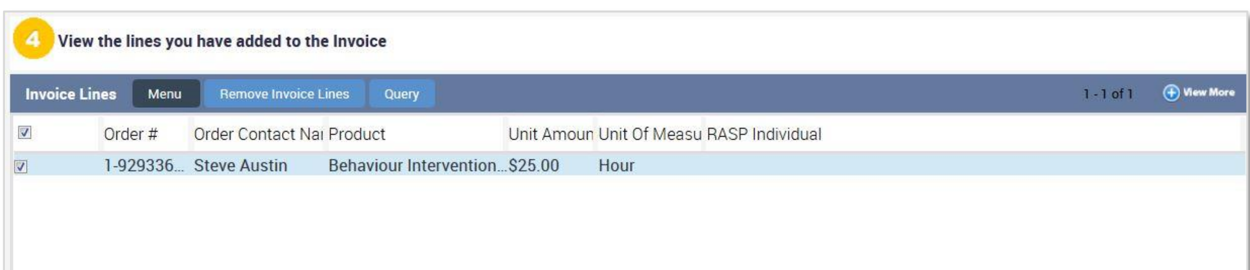
After selecting the required Order in Section 2, the available Order Lines will display in this section. To add an Order Line to the invoice, click the checkmark icon next to the desired order line to select it, or click a check marked order line to deselect it.



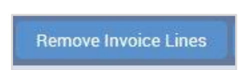
- If you have multiple rates for the services you provide, you may have an Order Line for each rate. If there are not separate Order Lines for each rate, you may need to contact Autism Funding to have the Order Lines adjusted.
- Some Products and Services are not supported for Portal Invoices such as 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.



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.

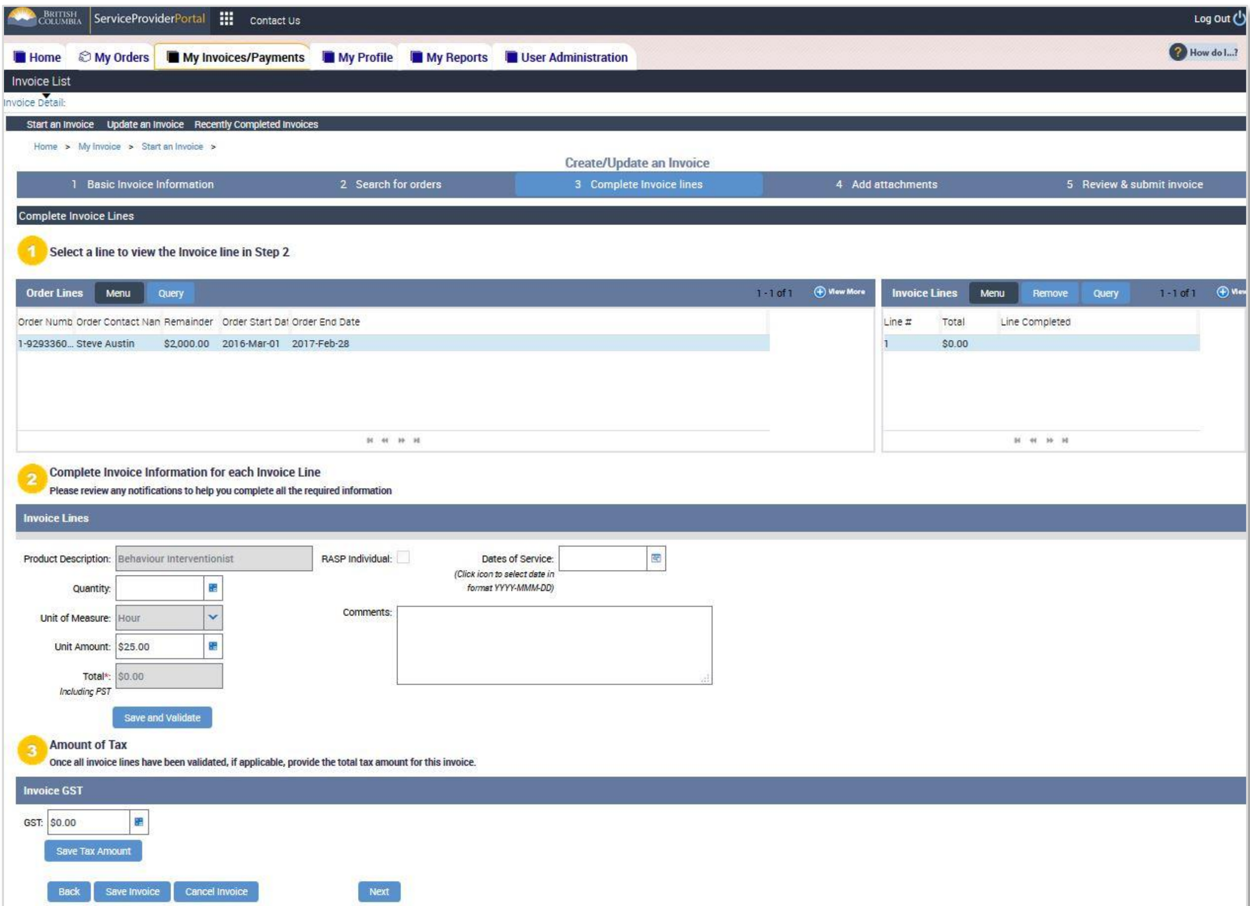


After adding all the required Order Lines to the Invoice, click "Next".

3: Complete Invoice Lines

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

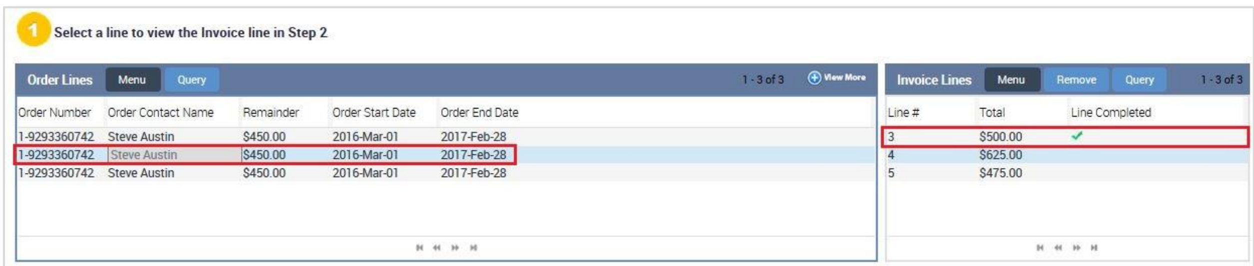
- Note: If you need to remove an Invoice Line from the invoice, you can click the “Back” button at the bottom of the screen. It is NOT recommended to use the browser’s Back arrow to return to the previous screen, or press any buttons while the system is processing as either will lead to an error message.



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.

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.



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.

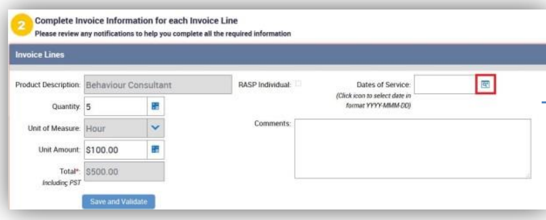
Note: The Order Lines and Invoice Lines tables in this section sometimes are not aligned, especially when there are multiple lines.

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.

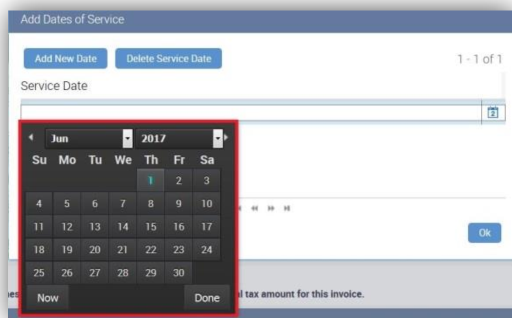
Dates of Service

The Dates of Service are required for each Invoice Line. Click the button to select the Date of Service.

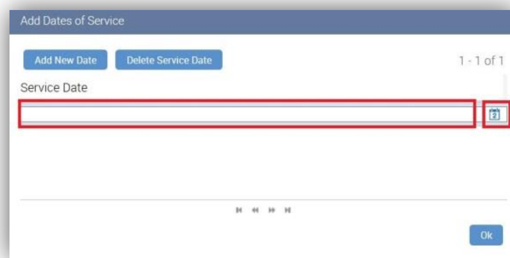


1.

2.



4.



3.

5.

1. Click the icon in the “Dates of Service” box.

2. Click the **Add New Date** button.

3. A line appears for the date. Click the calendar icon , which brings up the calendar.

4. 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". (Ie. January 31, 2017 would be typed as 2017-01-31). The date will automatically populate once you click off the service date line.

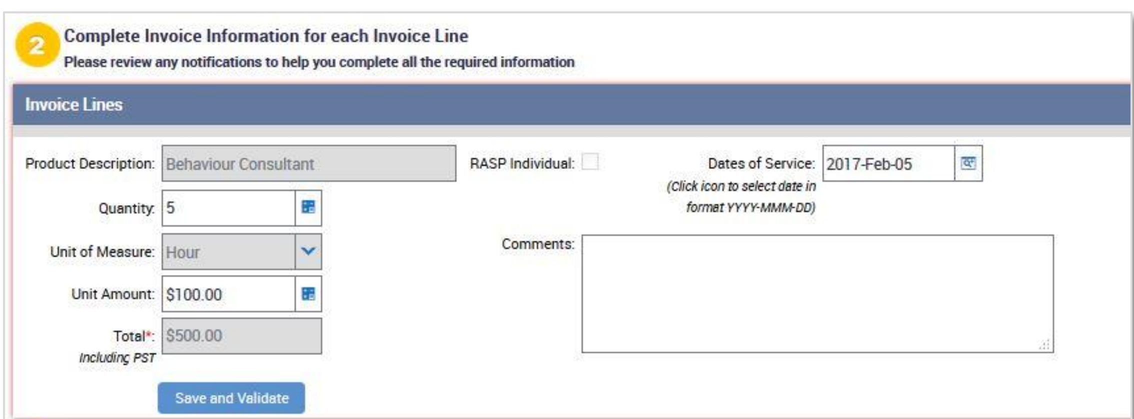
NOTE: You can click the Delete Service Date button if the date needs to be removed.

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

Invoice Lines

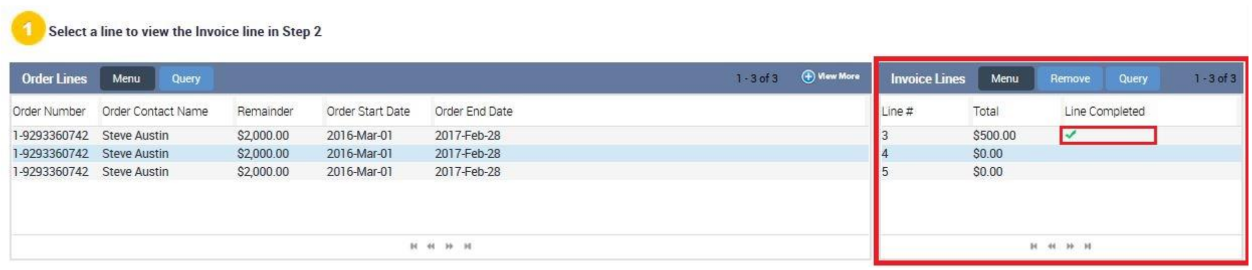
The hourly or daily rate is automatically populated in the Unit Amount field. You can change this amount if necessary but you cannot increase it above the amount Approved on the Order Line. You must type the total number of hours or days for this Invoice Line in the Quantity field and the Total amount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



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

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



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

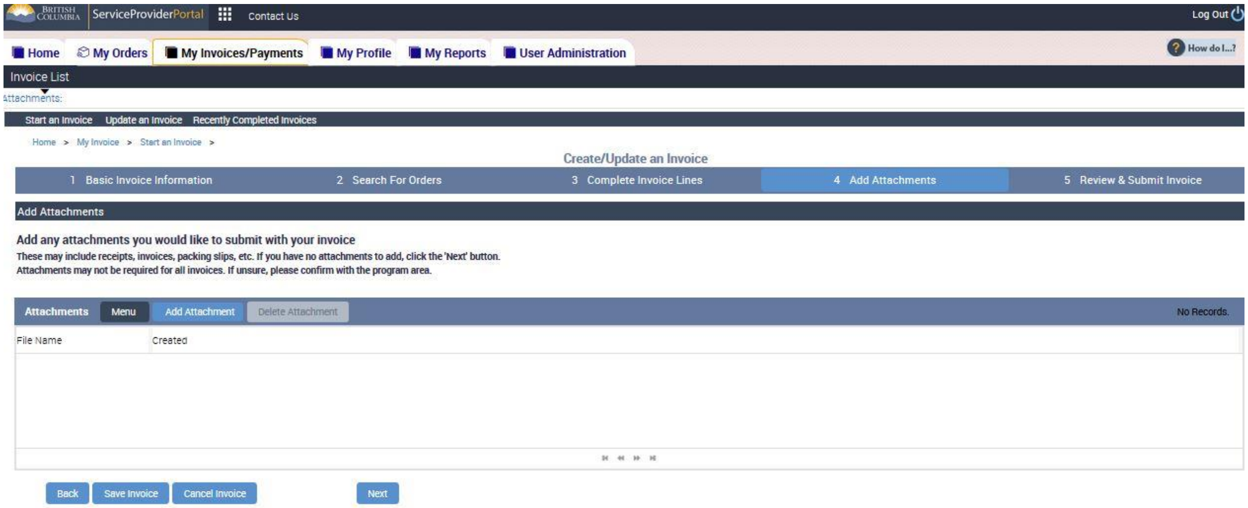
The GST amount for the entire invoice can be added in this section (if applicable). You must type the amount and then click the "Save Tax Amount" button. The amount entered will be displayed in the final step of the invoice process.

Once all Invoice Lines are completed, click the Next 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'.

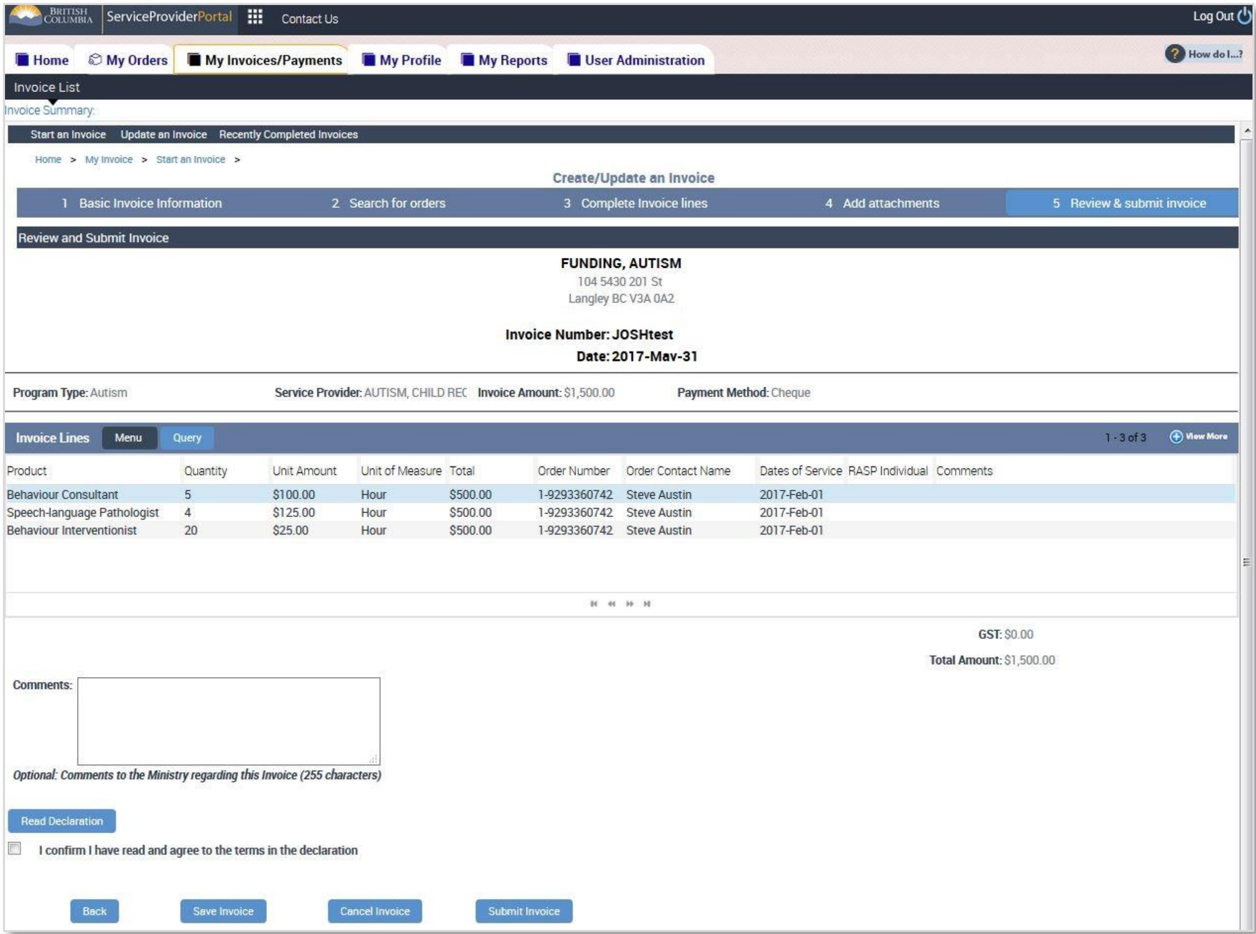


To add an attachment click the Add Attachment button, and select the file that you wish to attach.

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

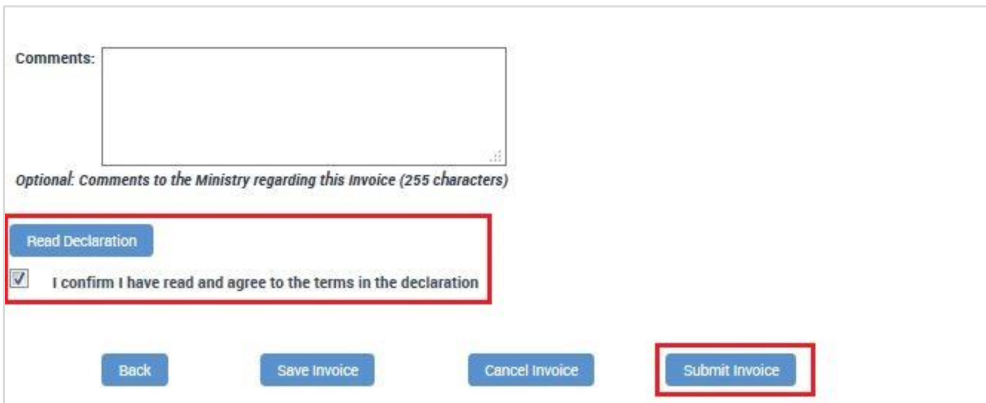
5: Review & Submit Invoice

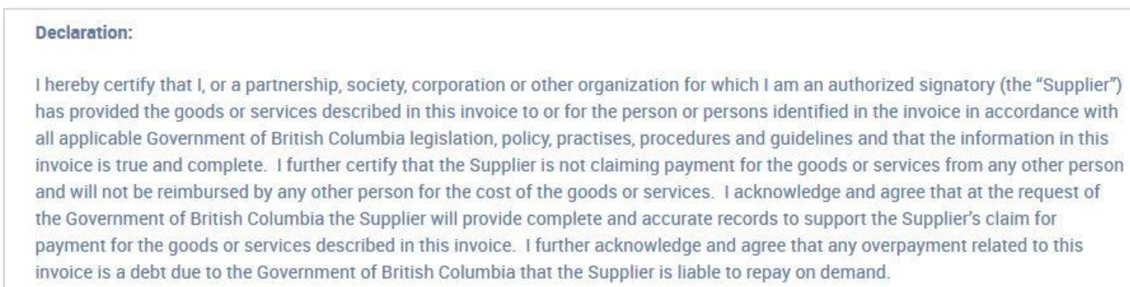
This step allows you to review all the details of the invoice prior to submitting it to the ministry. If any of the Invoice Line Total amounts or the GST amounts are not correct, use the Back button at the bottom of the screen to return to previous steps and update the information.



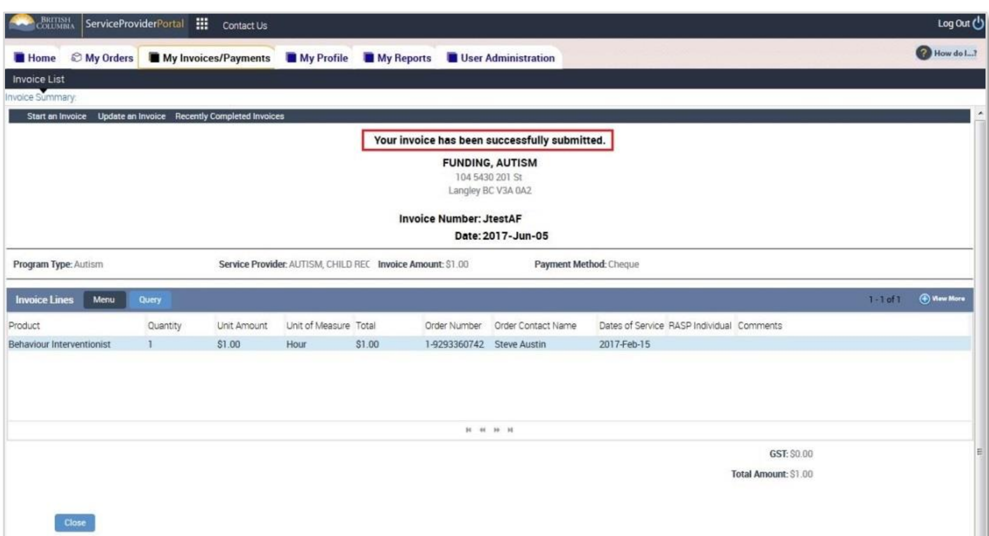
- Note: Only one of the Dates of Service saved for each Invoice Line is displayed in this view. To review all of the dates for an order line click the date of service on the desired order line, and then click the button.

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.





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.



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. It if is in another Status, such as "Pending" or "Cancelled", then it has not been received by the ministry.

Cancel or Update Invoice

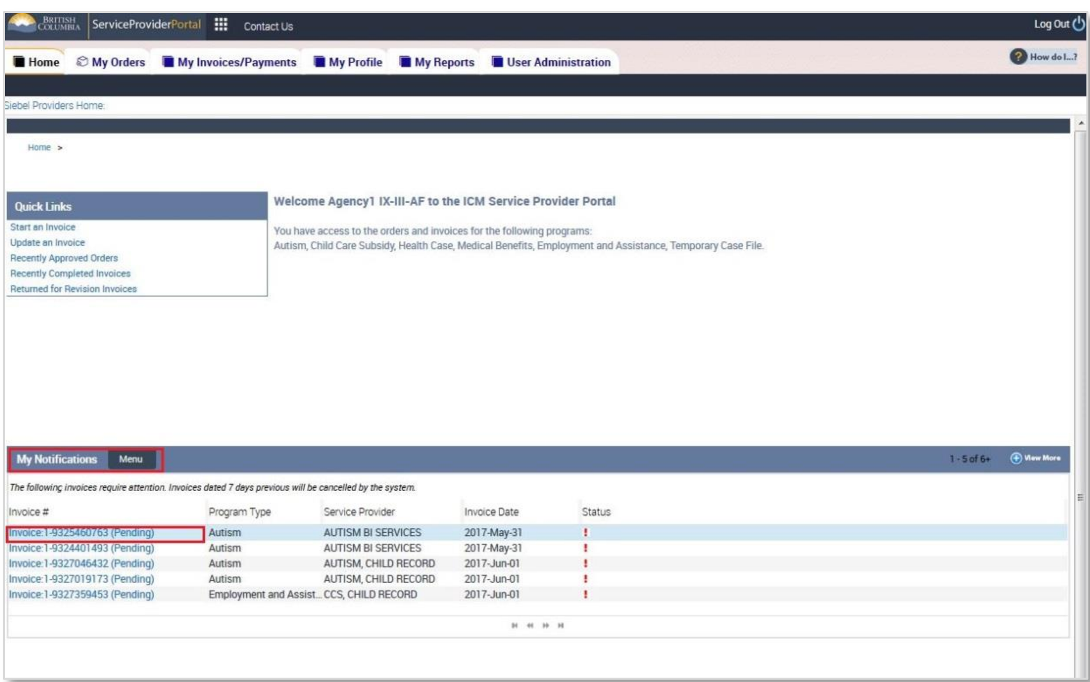
Invoices created and not submitted or cancelled are saved in a Pending state. These invoices may have Order Lines tied to them, which may prevent you from billing these Order Lines on another Invoice.

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.

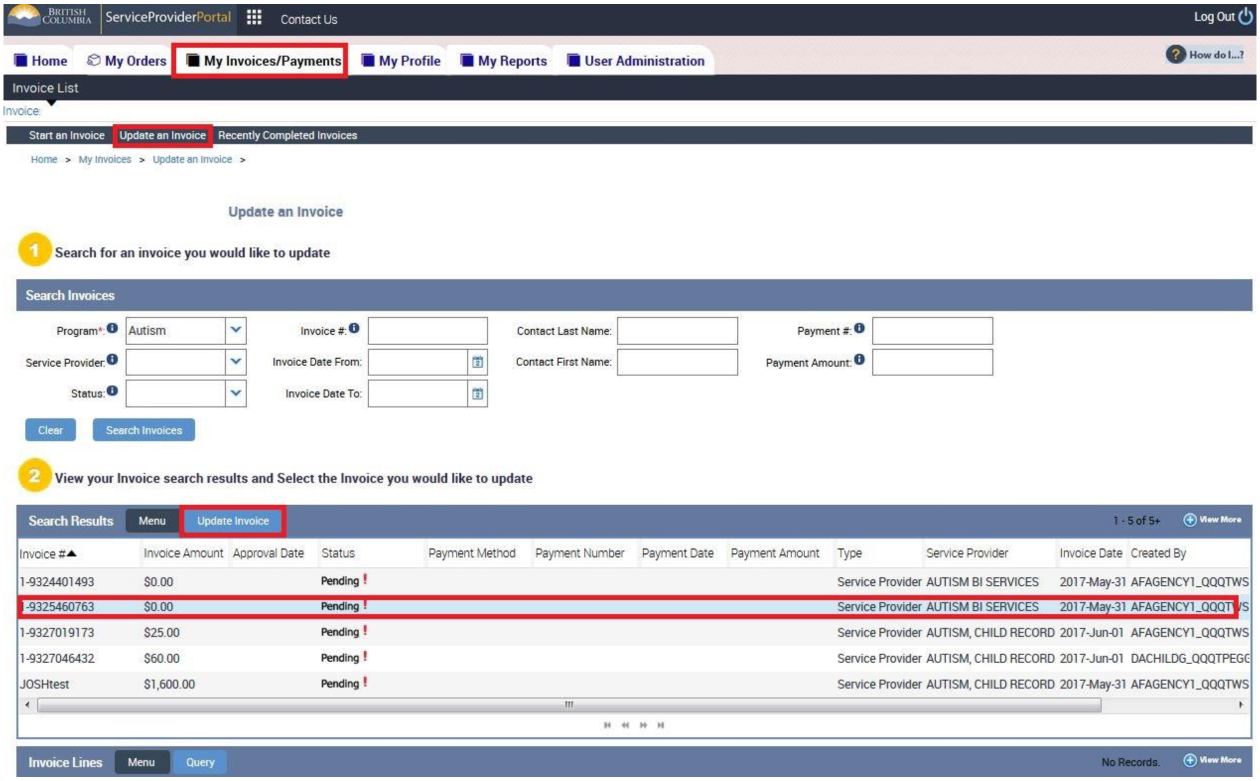
Pending and Returned for Revision Invoices are displayed on the Home screen in the My Notifications section. You can also search for a specific Invoice using the "Update an Invoice" quick link on the Home screen or at the top of the My Invoices/Payments screen.

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.



- 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.



This will navigate to Step 1 of the invoice creation process

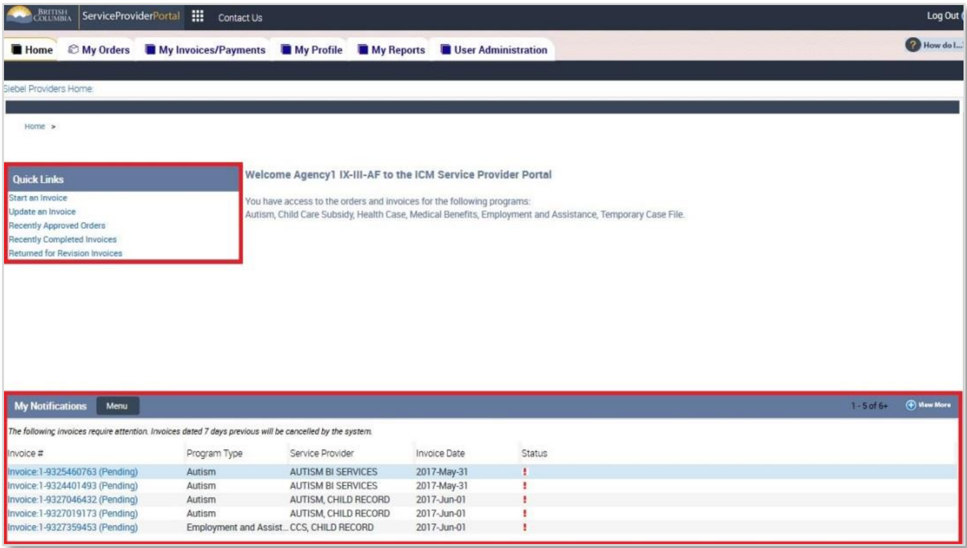
- To Cancel the Invoice, click “Cancel Invoice” at the bottom of the screen
- To Update the Invoice, enter invoice details and click “Next” to navigate through screens that are already fully completed.

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

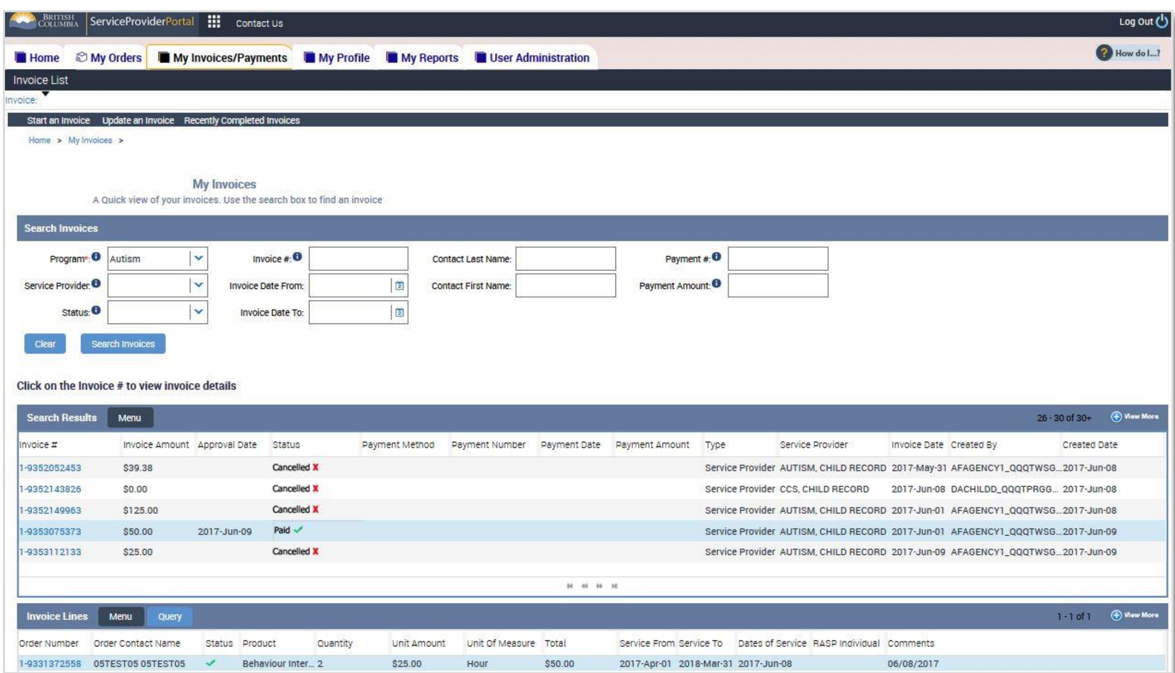
Quick Links

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.



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.



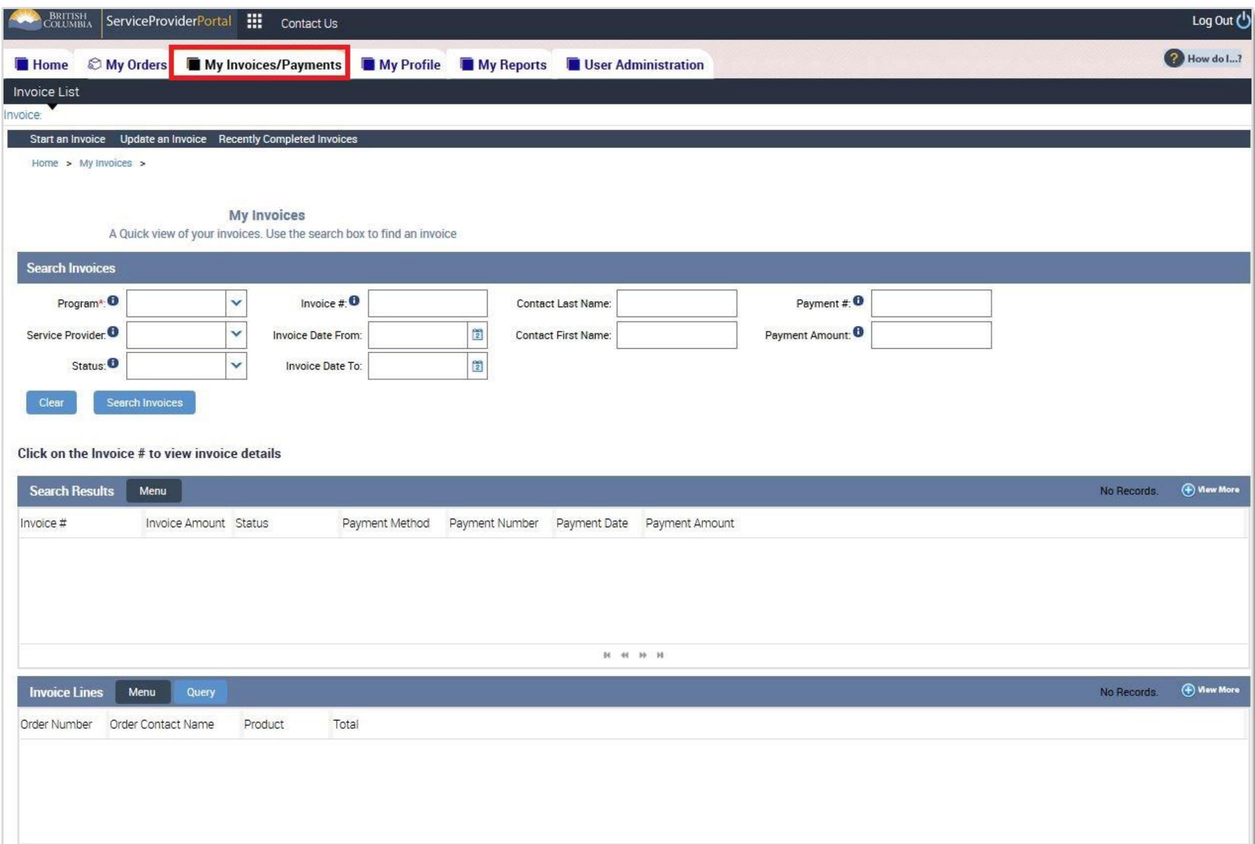
My Invoices/Payments screen

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 would you like it to be.



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.

Example searches:

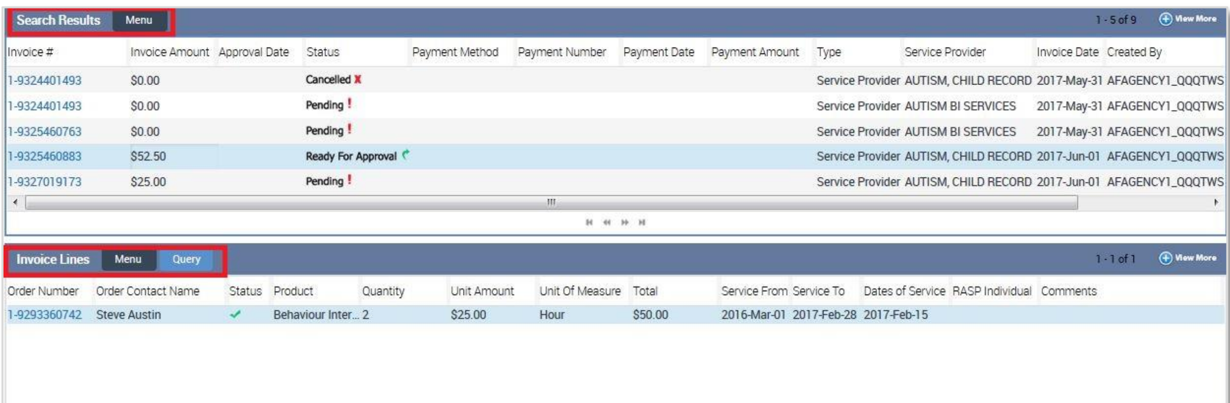
- To see only paid invoices: click the “Recently Completed Invoices” link on the Home screen, and then select the Status “Paid” in the Search Invoices section.
- To see if the Invoice just completed was submitted successfully: choose “Autism” in the Program Type field, and choose “Ready for Approval” 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.

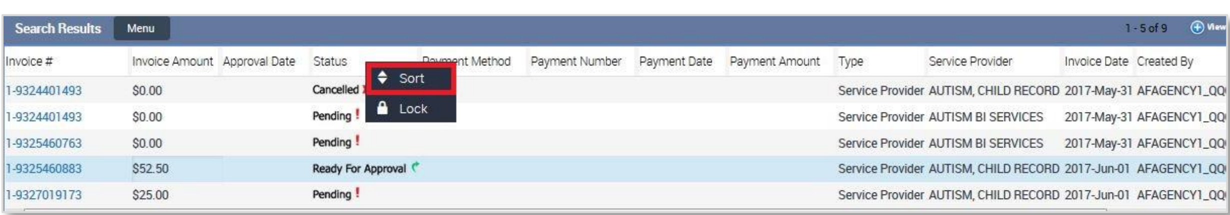
- Invoice Search Results: The Invoice shows information including the amount of the Invoice, the Status of the invoice, and payment details.
- Invoice Lines: The Invoice Lines show details about each individual Order Line claimed including the child's name, Product (service provided), number of hours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



Viewing Invoice details

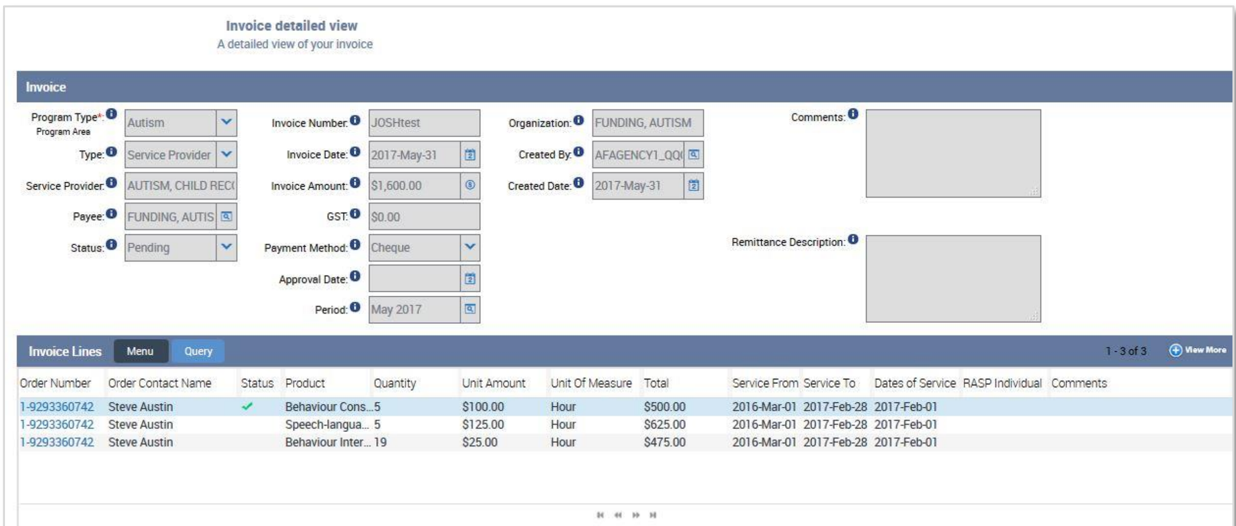
The Invoice Search Results displays up to five records but more may exist. The title bar of this section will indicate how many Invoices are displayed and how many there are in total (example: "1 - 5 of 10 +" means there are 5 Invoices displayed but over 10 in total). You can see the next set by clicking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

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

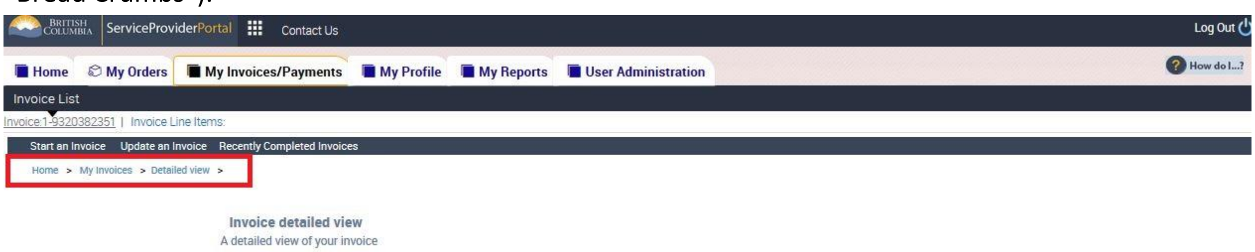


To view Invoice Line details for an Invoice, click the invoice number.

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.



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

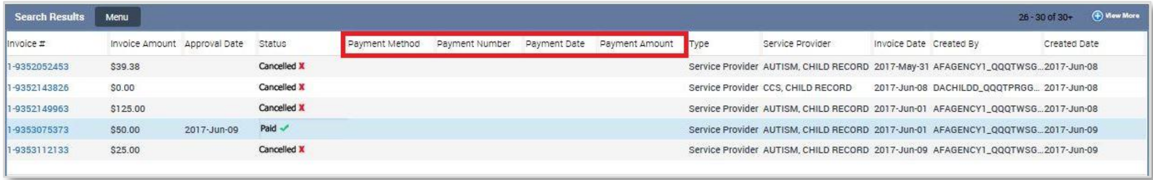


Payments

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.



Search Results | Menu | 26 - 30 of 30+ | View More

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	DACHILDD_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

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.

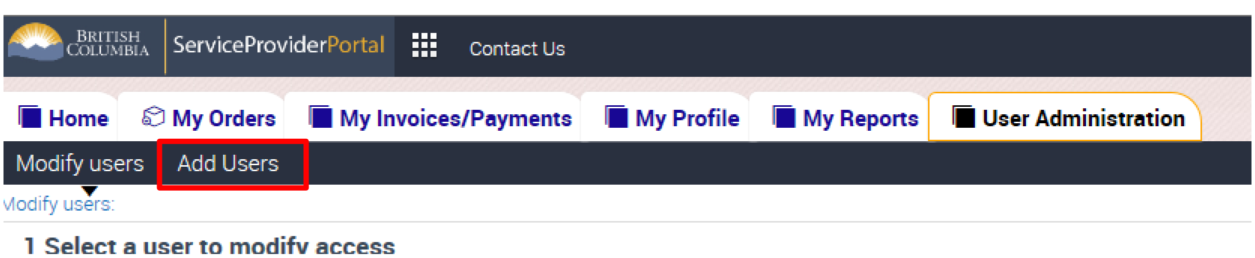
Navigating to the User Administration Screen

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

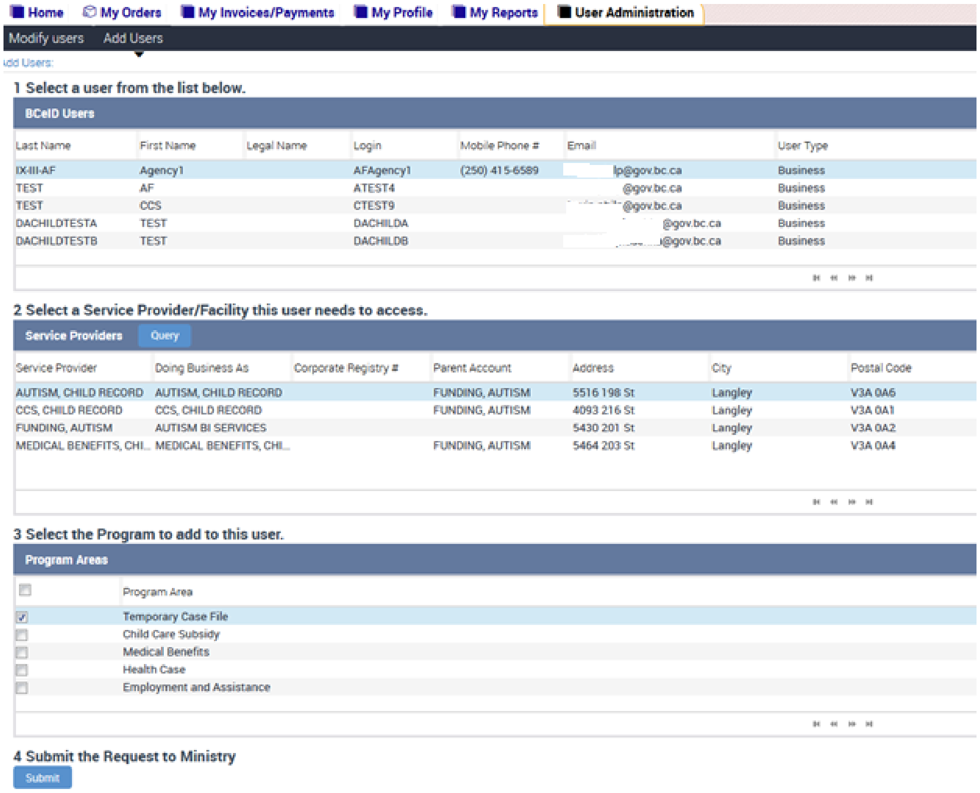
- Modify user
- Add user

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.



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.

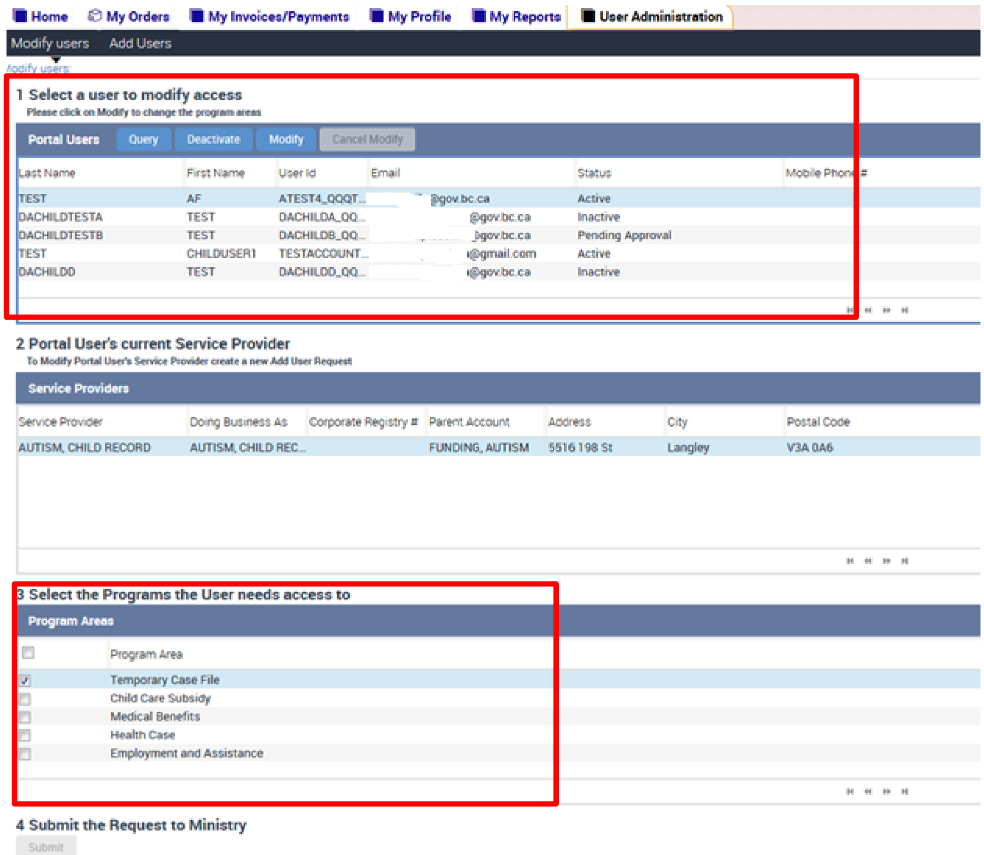
Program Areas

☐	Program Area
☑	Temporary Case File
☐	Child Care Subsidy
☐	Medical Benefits
☐	Health Case
☐	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

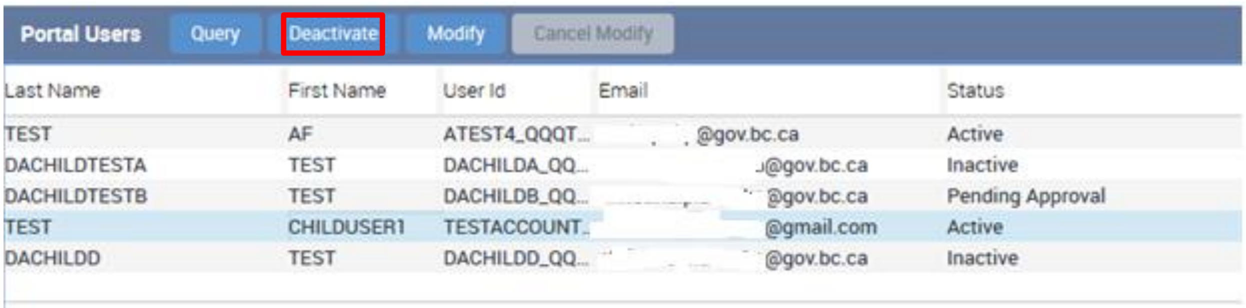
1. To modify a user’s access to the portal, Navigate to the Modify screen under the User Administration tab.



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.



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. It if 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 verses 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)