Service Provider Portal Guide

December 2019

BRITISH COLUMBIA | Ministry of
Social Development
and Poverty Reduction

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Service Provider Portal Guide

As service providers, you are key partners in the delivery of vital services to the individuals and families we serve. We're continuously looking for ways to improve how we work with you to best support British Columbians.

What is the Portal?

The Service Provider Portal (the Portal) is a secure interface for Social Development and Poverty Reduction (SDPR) service providers. Here you can access self-service options to create and submit electronic invoices and view the status of authorizations and payments. Your access will be specific to the services you provide and your program type.

The Portal will give you:

▶ Access to view approved SDPR orders

▶ The ability to create and submit invoices electronically, increasing the speed at which payment can be generated

▶ The ability to create invoices as soon as the orders are approved, without needing to wait for verification of order numbers

▶ Access to view the status of your payments and details including the payment amount and the payment date

The Portal is accessible 24 hours per day, seven days per week. Ministry support is available Monday through Friday from 9:00 a.m. to 4:00 p.m. Pacific Standard Time, excluding statutory holidays.

Visibility & Privacy

The Freedom of Information and Protection of Privacy legislation sets out access and privacy rights of people in British Columbia. Those authorized to access the Portal see information relevant to clients in their organization. There's no difference to what you currently receive in paper format and what you'll see in the Portal (i.e. the name of the individual receiving service, or the amount and types of service authorized).

You will have access to the relevant information you need to serve your clients.

Getting Started

Computer System Requirements

To use the Portal, use one of the following operating systems and internet browsers:

Operating systems:

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

Browsers:

- ▶ Internet Explorer (version 7 or later; system is currently optimized for IE 8)
- ▶ Google Chrome (version 22)
- ▶ Firefox (15)

PDF document reader:

- ▶ You will also need Adobe Acrobat Reader (version 7 or higher), download Acrobat Reader at get.adobe.com/reader/otherversions/

To download one of the above browsers or the reader, click the title of the one you want and follow the instructions.

BCeID Requirements & Registration Assistance

To access the Portal, your organization must have a Business BCeID. This is different from a Basic or Personal BCeID. You can visit www.bceid.ca/aboutbceid to learn the difference.

If you do 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.

For further help with the registration process, contact the BCeID Help Desk. It's open Monday to Friday (except statutory holidays) from 7:30 a.m. to 5:00 p.m. Pacific Standard Time.

Request Access to the Portal

Once you have a Business BCeID, complete and submit the Service Provider Access Request form (HR3636) to SDPR. The form can be submitted to any SDPR office in person, by fax or by email:

In person:	Office locations
Fax:	1 866 399-9350
Email:	RSDSPMG@gov.bc.ca

You'll be notified by email when your access has been granted. To follow up on your request for access to the portal, you may email RSDSPMG@gov.bc.ca.

Navigating the Service Provider Portal

Log in to the Portal

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

2. Enter your Business BCeID **user name** into the BCeID field.

3. Enter your Business BCeID **password** into the Password field.

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

5. Press **Continue**.
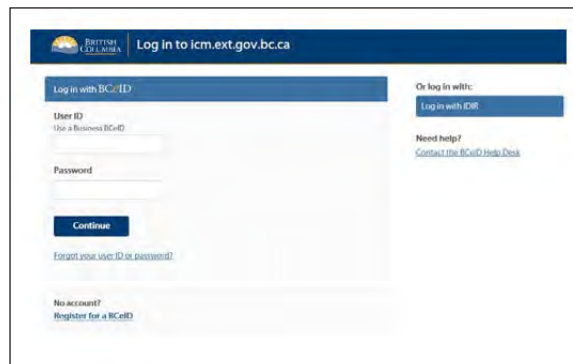
Your "Home" Screen

Once you have logged onto the portal using your BCeID and password, you'll be taken to the home screen.

The welcome message in the center of your screen will tell you what information you can access in the Portal and for which program(s). It also lets you know of any important information or current notices.

Quick Links

The home screen of the Portal includes **Quick Links**, located on the left-hand side. This provides shortcuts to commonly used tasks:

‣ Create an invoice

‣ Update an invoice

‣ Recently approved orders

‣ Recently paid invoices

‣ Returned for revision invoices

My Notifications

My Notifications are located at the bottom of your screen and includes a list of invoices requiring action. Click on the invoice number to access to the invoice.
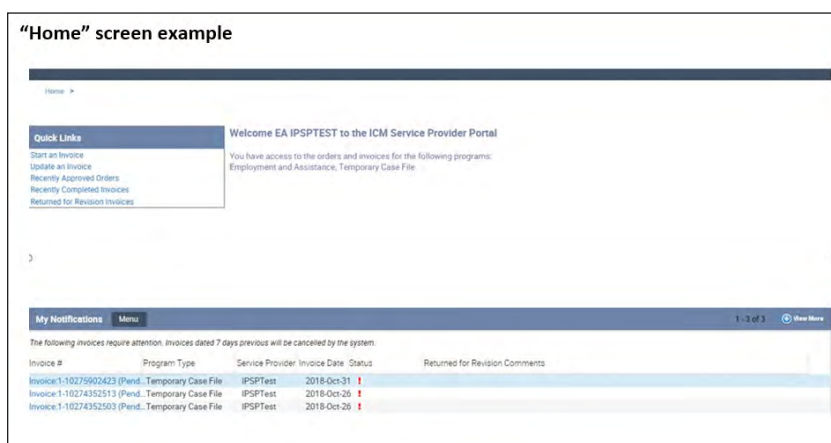
iHelp & Information Icons

Accessing iHelp

To access iHelp topics in the Portal, click the "**How do I …?**" icon in the top right corner of your home screen. This will open a side bar with a list of iHelp topics. You can keep working in the Portal with this sidebar open.

iHelp step-by-step instructions include:

- ▶ Clearing notifications
- ▶ Clearing notifications (in progress, 16)
- ▶ Error messages
- ▶ Generate the order and invoice summary report
- ▶ Invoice – Create
- ▶ Invoices – Create (in progress, 22)
- ▶ Invoices – Search
- ▶ Invoices – Update
- ▶ Orders – Search
- ▶ Payment – Search
- ▶ Reports – View a previously created report

Information Icons

The portal includes information icons that look like a white, small-cased "i" in a blue oval:

Hover you mouse over these icons to read helpful tips and information.

Note: Multiple ministries and their service providers use the Portal. You may see references in iHelp that do not apply to your program type.

Screens/Views

There are six tabs at the top of the screen:

▸ **Home** displays the welcome message and any notifications

▸ **My Orders** shows ministry approved products and services that can be billed

▸ **My Invoices/Payments** shows you invoices for any services provided (to receive payment, you must submit an invoice)

▸ **My Profile** displays your organization's information and facilities information if applicable

▸ **My Reports** allows you to view reports that have been previously created

▸ **User Administration** allows you to view Portal users, service providers and program areas
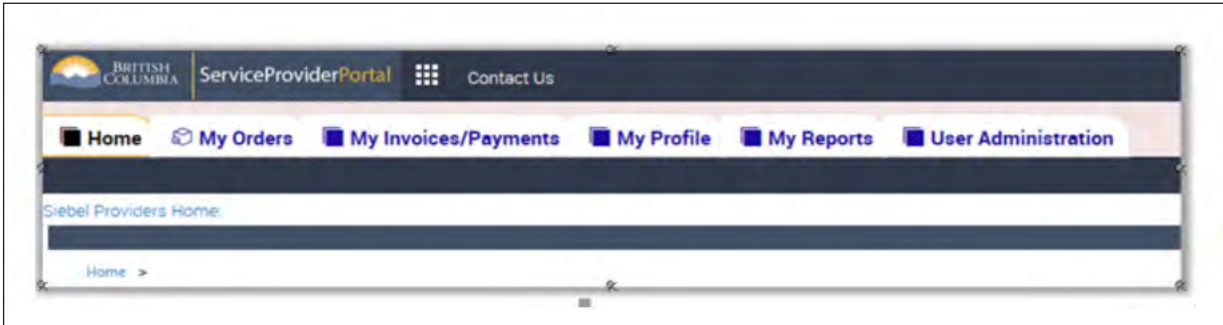
Searching, Viewing & Sorting

The **My Orders** and **My Invoices/Payments** screens have search sections. In these sections, only the **Program Type** is a required field, but you can use the other fields to help refine your search
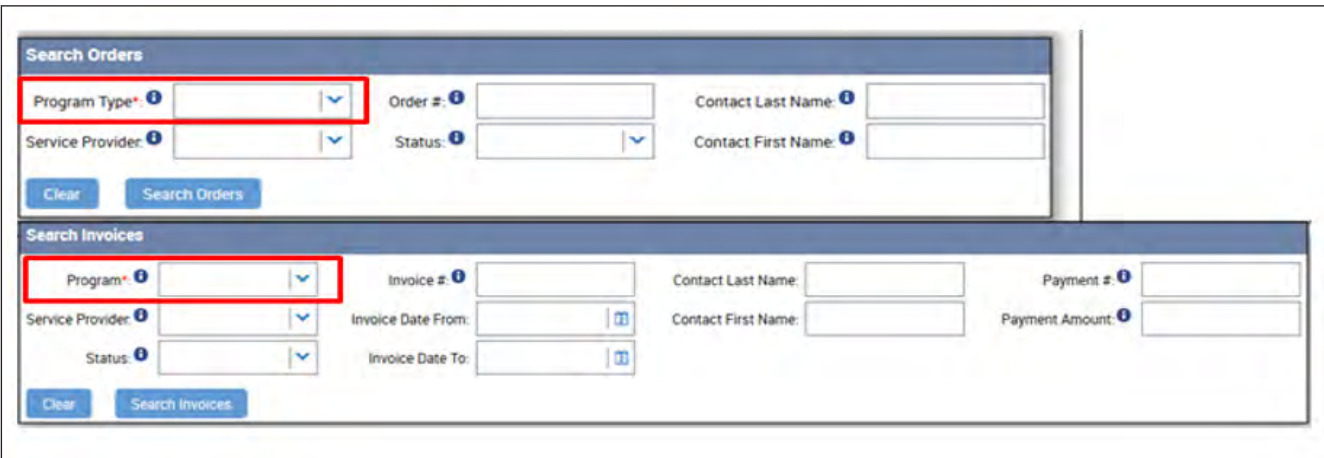
Sort records by clicking the up or down arrows in the column title "sort" option.
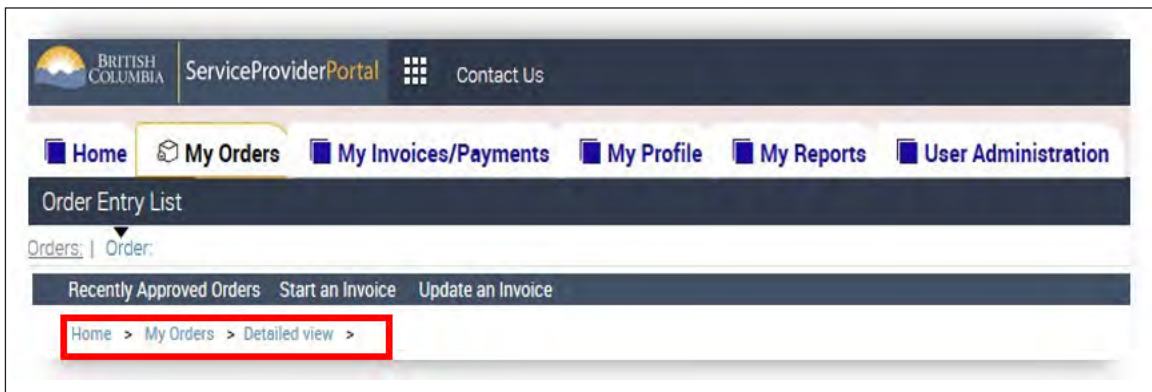
Navigating Through the Screens

Don't use the browser's back arrow to return to the previous screen or press any buttons while the system is processing. This will lead to an error message.

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

During 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 an invoice.

Using "Wildcard" to Assist with Correct Spelling of a Contact's Name

Add an asterisk (*) as a placeholder for any unknown terms. A partial name followed by the asterisk or a string of information separated by asterisks is acceptable. This is often used when a portion of the first and/or last name is not spelled accurately

How to Search for Orders

About Orders

If SDPR clients receive services from you as a service provider, depending on the type of service, you're required to get approval to have these services billed directly to the ministry. When a request is made to the ministry to bill for these services, either by the client or you as the service provider, the ministry assesses and provides approval for the amount that can be billed. This approval is called an order in the Portal.

Orders are visible in the Portal as soon as they are approved. You can view the details and submit invoices either immediately or the following month, depending on your program type.

You can search for approved orders separately without creating an invoice.

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. The most recently approved orders will display at the top of the list
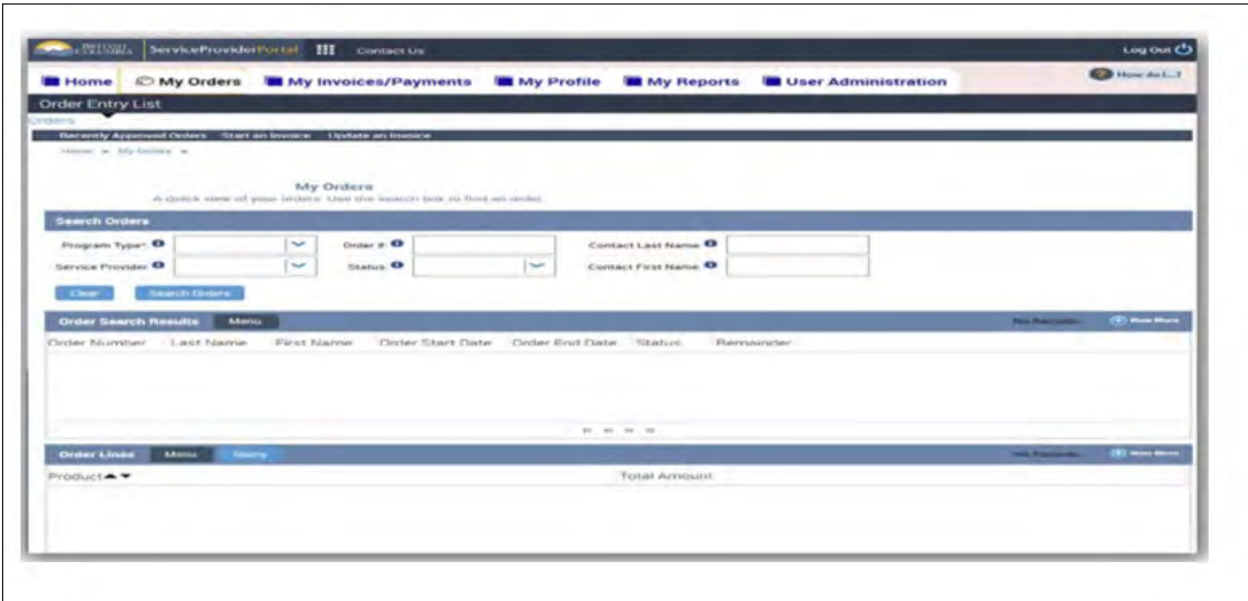
My Orders Screen

This screen displays your orders, **Order Lines** and a **Search Orders** function. The order screen shows information and details, including:

‣ First/ last name

‣ Total amount approved

‣ Amount remaining

‣ Start and end dates of the order

‣ Any attached invoices

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** (all other fields are optional).

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 and Contact Last Name:** The "contact" is the client and their first and/or last name must be entered exactly as it appears on the SDPR case file if you wish to use this field to search (you cannot search using a nickname as only the legal name of the client is attached to the order)

▶ **Service Provider:** This is the individual or organization providing the services

▶ **Program Type:** This is the ministry programs such as Employment and Assistance, Temporary Case File, Health Case, or etc.

▶ **Status:** You can view orders that are Approved and Closed and 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
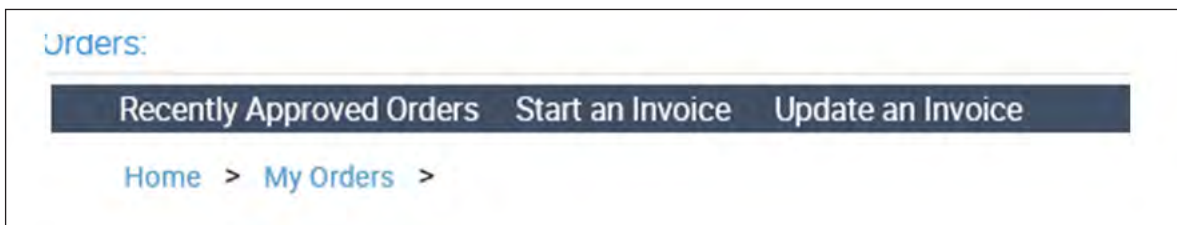
To see the details of an order:

▶ Choose appropriate program in the **Program Type** field and enter the order # in the order # field

To see the order history for a client (approved and closed orders):

　• Enter the name in the Contact First Name and/or Contact Last Name fields and choose the appropriate program in the Program Type field

After you've selected what you are searching for, click the Search Orders button.

Order Search Results

There are two sections in this view:

▶ **Order Search Results**: Shows information including the client's name, the amount approved, the amount remaining and the start and end dates of the order

▶ **Order Lines**: Order details, including the product (type of service), daily or monthly amount and the total amount for each type of service
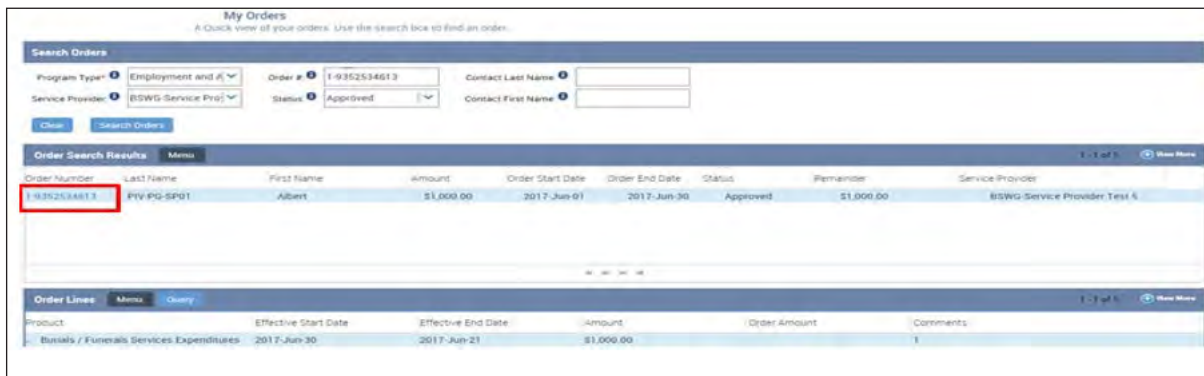

Viewing order details

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 (i.e.: 1 - 5 of 10 + means there are 5 orders displayed but over 10 in total). You can see the next set by clicking the "+" sign to the right. There is also a **View More** button in this section so you can see more orders on one screen.
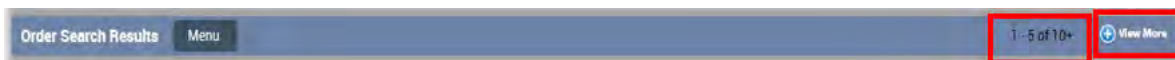
The orders may be sorted by any field by clicking the up or down arrows in the column title. The green arrow indicates how the orders are sorted.
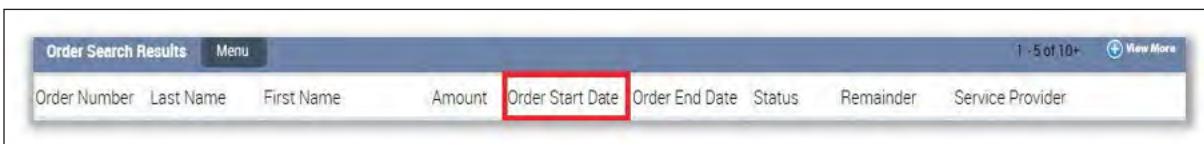
To view more details about the order, such as invoices attached to the order, click on the **Order Number.** This navigates you to a detailed order view that allows you to see invoices the order has been associated to. You can then click the **Invoice Number** from here to see more details about the invoice.

How to Create & Update Invoices

About Invoices

To receive a payment for services provided, you must electronically submit an invoice in the Portal. SDPR will process the payment and deposit payment directly you or your organization's bank account. SDPR will contact you if further clarification is required.

Creating an Invoice

Use Quick Links to access 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. You then click the **Create New Invoice** button.

Navigating the Create/Update an Invoice Process

When you create a new invoice or update an existing invoice you will be navigated to the five-step **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.

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 later to complete it.

It's NOT recommended to use the browser's **Back** arrow to return to the previous screen. Also refrain from pressing any buttons while the system is processing as doing either may lead to an error message

Five Steps of the Create/Update an Invoice Process

Step 1. Basic Invoice Information

This step captures the "Basic Invoice Information" including the Program, service provider, and the unique invoice number.

Program

The ministry program type associated to the invoice (Employment and Assistance, Temporary Case File, Health Case). After the Program field is selected a new field called "Returned for Revisions Comments" will be displayed.

Payee

The organization or individual to receive payment from the ministry. The payee cannot be changed in the Portal; it's set by the ministry based on your organization structure.

Service provider

The "service provider" associated to the approved order.

Invoice #

The invoice number must be unique to your organization on each invoice. You can enter a number you choose 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 if it's 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.

Month

This is the billing month and year for this invoice.

Note: For Program Type "Employment & Assistance and Residential Care Products", you can only invoice for previous months, not the current or future month.

Comments

This is an optional field if you have information you wish to communicate to the ministry.

After completing the required fields, click **Next**.

Step 2. Search for orders

The orders matching the requested criteria will be displayed in the Orders Search Results. This step allows you to add order lines to the invoice. A Purchase Authorization also known as "order" represents approved funding for the client.

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

The Order Search section may be used to search for specific orders if the order did not display in your original search results. Searching for orders is not a required step; it's a tool that can be used if you are looking for a specific client or order to add to the invoice. Searching using the Order Number is recommended as all the previous orders are also visible in this view and it's important to select the current order for the invoice.

Order Number: This is a system-generated number.

Contact Last Name/Contact First Name: The client's legal name.

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

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 # hyperlink to see the order detailed view.

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, check the box to the left of the product and then click the **Add Order Lines** button.

You can click the selector icon beside the Order Line to highlight that line, but you do not need to select the line before adding it to the Invoice.
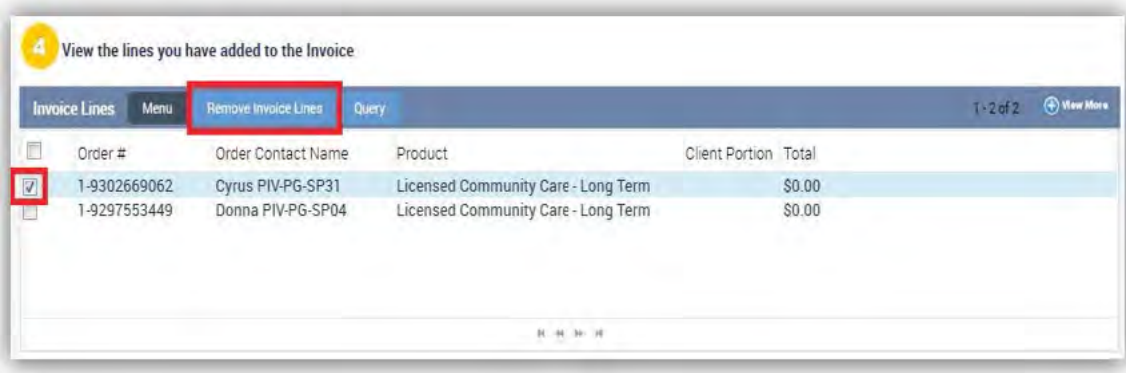

Note: If there are several Order Lines associated to the order, you can click the top box to check all the Order Lines and then click the "Add order Lines" button.

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

After you click Add Order Lines button in the previous step, view the lines you have added to the invoice.

If an **Invoice Line** needs to be removed from the invoice, check the box to the left of the other line and click the **Remove Invoice Lines** button.

After adding all the required order lines to the invoice, click Next.

Step 3: Complete invoice lines

This step allows you to complete the dates or days you provided service for the client. If you need to remove an Invoice Line from the invoice, you can highlight the Invoice Line and click the remove button OR you can click the **Back** button at the *bottom* of the screen to go back to step 2.

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. Doing either may lead to an error message.

Section 1: Select a line to view the Invoice Line 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 the next section (Section 2) and then the details automatically update. 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 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):

- ▸ ✔ a green checkmark means the Invoice Line information entered is valid
- ▸ ⚠ a yellow caution sign means the Invoice Line information entered is valid, but it will require additional review by the ministry before approval
- ▸ ✗ a red X means the Invoice Line is not valid and the invoice cannot be submitted with the details entered in Section 2

<div style="background:red;color:white">review the Notification error message in Section 2 for details</div>

Section 2: Complete invoice information for each line

The "Product Description" is automatically populated.

The "Unit of Measure" is the rate at which you charge (hourly, daily, weekly, monthly) and may or may not be populated, depending on the order.

If the Unit of Measure field is blank, enter the total amount of units in the "Quantity" field.

A unit is considered a single rate of service that's dependent on what you choose as your "Unit of Measure" (i.e. the rate for one hour, one day, one week, or one month).

The "Unit Amount" is the price per unit. (if your Unit of Measure is a daily rate, your Unit Amount is the cost for one day).

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 daily or monthly rate for this Invoice Line in the Unit Amount field and the **Total** amount will be calculated automatically.

You can enter any related comments in this screen, which will be reviewed by the ministry.

Approved orders may contain Order Lines with negative amounts. These Order Lines will be identified as Excess Unearned/Earned Income. This Excess Unearned/Earned Income is funds that the client receives from other sources that is deducted from the approved amount the client is eligible to receive. This income may be Canada Pension Plan benefits, Employment Insurance earnings, etc.

If the approved order includes Excess Unearned/Earned Income lines, enter this amount in the Client Portion field. The Client Portion will be deducted from the Total amount. If the Excess unearned/Earned Income is no longer applicable (i.e. you have been advised by the client they are no longer receiving the income), you will need to contact the ministry to have the approved order adjusted.

After you have completed the details in this section, you click the **Save and Validate** button. If you need to navigate between Invoice Lines, use the **Back** and **Save and Validate** buttons in this section.

The "System Comments" section will update if there is an error or other notice.

Section 3: Amount of tax

If applicable, the GST amount for the entire invoice can be added in this section. You must type the amount of GST 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.

Step 4: Add attachments

This section gives you the option to add an attachment to submit to the ministry with your invoices. If no attachments are required, click **Next**.

Attachments are only required if specifically requested by a SDPR worker.

There are a few steps, detailed on the next page, to successfully attach a document to the invoice. If you click **Next** and get the message "**You have unsaved changes on Attachments. Continue?**" this means that the document is not yet successfully attached and if you continue it will not be submitted to the ministry.
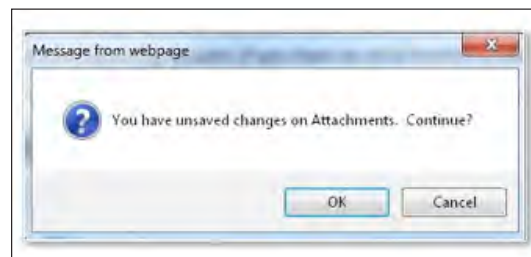
Instructions to add attachment

1. Click the **Add Attachment** button.

2. The pop-up shows the documents on your computer. Locate the correct document and select it. Click **Open**.

3. Click **Save**.

4. The document is now attached if it's listed in this view.

5. Repeat if there are more documents to add or click "Next" to continue with the invoice.
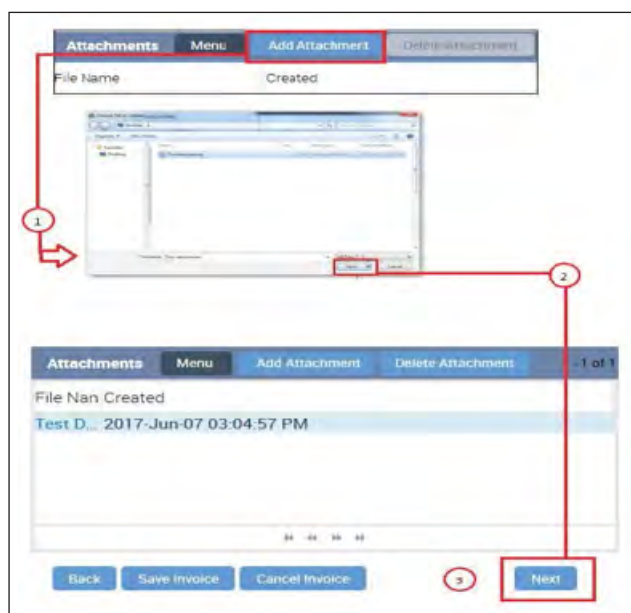
Step 5: Review and submit invoice

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 (if applicable) are not correct, use the **Back** button at the bottom of the screen to return to previous steps and update the information
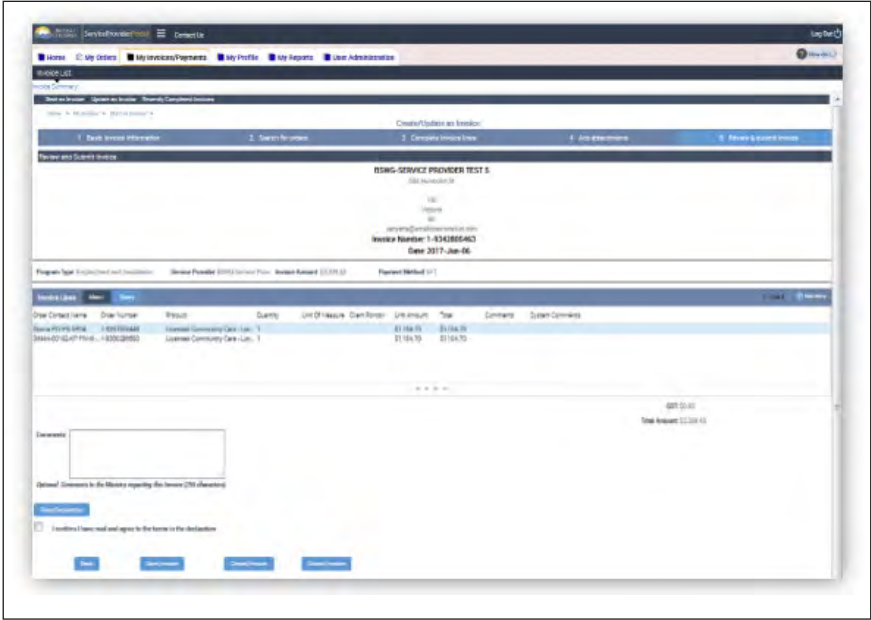
When you are ready to submit the invoice, click the check box to confirm you have read and agree to the terms in the declaration. The declaration can be read by clicking the **Read Declaration** button. Click **Submit** if you are ready to submit the invoice.
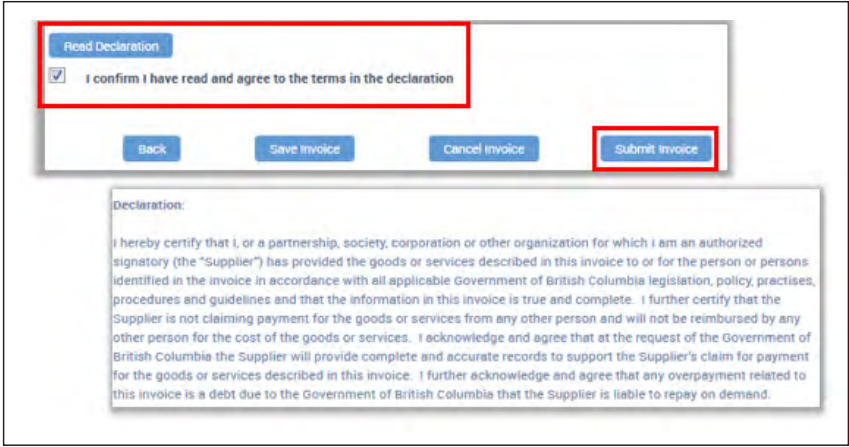
After submitting the invoice, you will see a **Confirmation** screen indicating your invoice has been successfully submitted. You can print this screen for your records, but you are also able to search for the Orders and Invoices in other views if you want to print this information later.
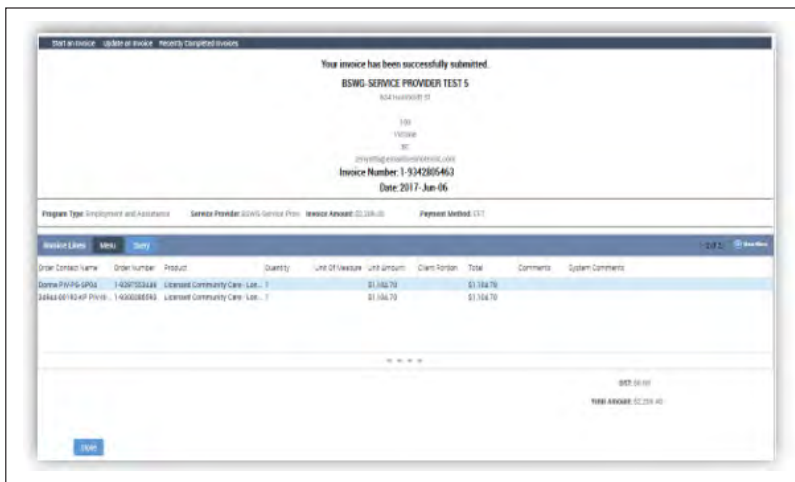
To see if the invoice just completed was submitted successfully, go to the **My Invoices/Payments** screen and search for the invoice. If the invoice is in **Ready for Approval**, **Approved** or **Paid** status then it was received successfully by the ministry. If it's in another status, such as **Pending** or **Cancelled**, then it has not been received by the ministry.

Returned for revision

After you submit an invoice through the Portal, staff will validated it. The ministry cannot change information you have entered on the Invoice Line. 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.

Returned invoices returned may contain the reason it was returned by the ministry. To view this information, hover the mouse over the Returned for Revision Comments field or select Returned for Revision Invoices from the Quick Links menu on the **home Page**.

My Invoices/Payments will now be displayed with the results showing all invoices Returned for Revision. Review the Returned for Revision column field for details or select the invoice number to see the comments within the invoice.

Invoice Detailed View is an explanation of why the invoice was returned and will be noted in the Returned for Revision Comments.

Cancel or Update Invoice

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.

Invoices created and not submitted are saved in a Pending state. These invoices may have Order Lines added to them, which may prevent you from adding these Order Lines to another invoice.

You can locate an invoice in two ways:

1. From the **My Notifications** on the home screen, click on the **Invoice Number**, or

2. 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**

Doing either of these steps will navigate you to Step 1 of the invoice creation process:

1. to cancel the invoice, click **Cancel Invoice** at the bottom of the screen, or

2. 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 SDPR 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:

▸ Start an Invoice

▸ Update an Invoice

▸ Recently Approved Orders

▸ Recently Completed Invoices

▸ 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 approved and ready for approval invoices.

When you submit an invoice to the ministry through the portal, the invoice will be reviewed by ministry staff. Once the ministry approves the invoice, the invoice status changes to **Approved** in the portal.
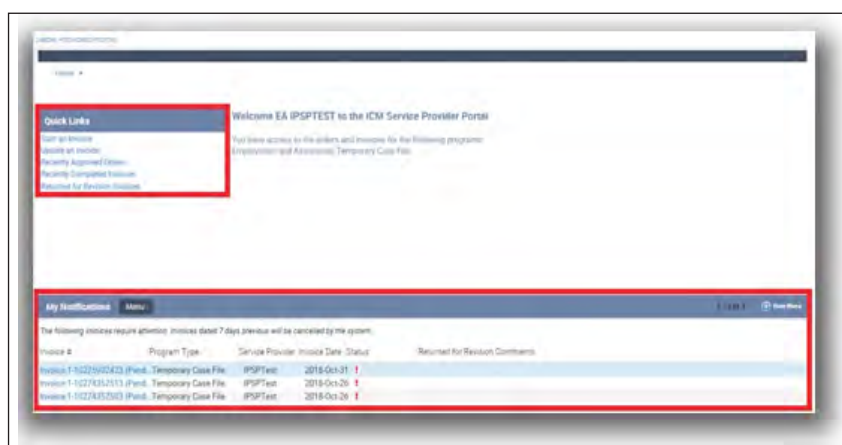
Invoices will update to **Paid** status (shown in example on next page) once they are approved by the payment system and the payment will be generated within a few days. This means that you can see the date the payment will be made, in advance of the payment being sent to you.

Example: "My Invoices" and invoice details
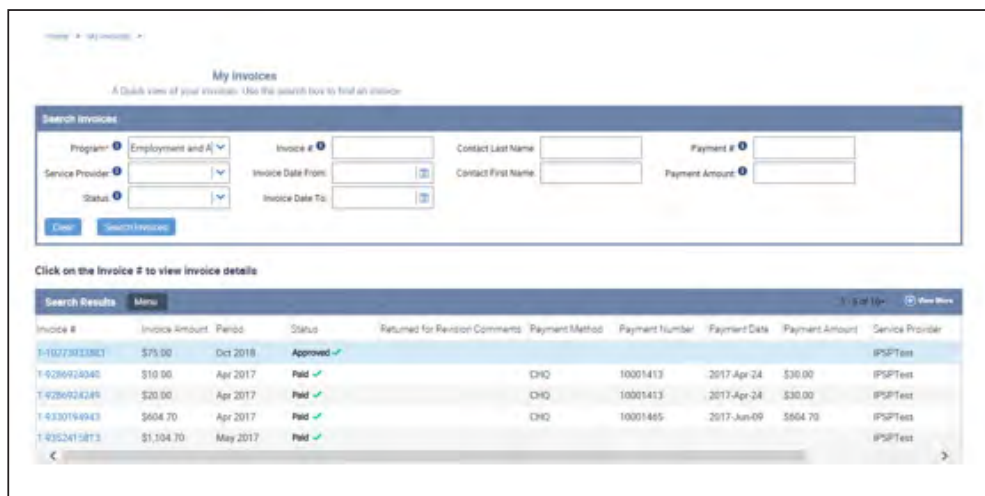
My Invoices/Payments Screen

This screen allows you to view details about the invoice and payments.

The invoice shows information that includes:

▸ Amount of the invoice

▸ Status of the invoice

▸ Payment details

The Invoice Lines show the individual total amounts and days or month claimed for each client.

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.

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**

▸ **Program Type:** This is the ministry program. (Employment and Assistance, Temporary Case File or Health Case).

▸ **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 it.

▶ **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 **Paid** invoices:

▶ click the **Recently Completed Invoices** link on the home screen

To see if the invoice just completed was submitted successfully:

▶ choose **Employment and Assistance** 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 "**Approve**" in the status field)

To see all Paid invoices for a year:

▶ choose **Employment and Assistance** 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.

▶ **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 client's name, Product (service provided), number of days or months (Quantity) and the Total amount.
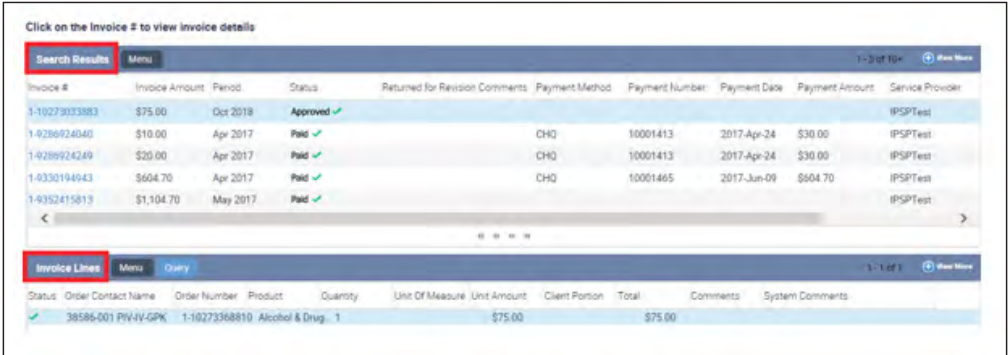
Viewing invoice details

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 (i.e.: 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. Click **View More** to see more Invoices on one screen.

The invoices may be sorted by a field by clicking the up or down arrows in the column title.
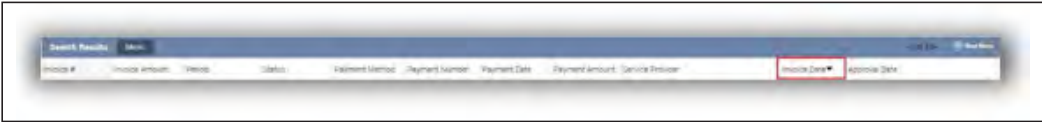
To view more details about the invoice, or to print the invoice, click on the **Invoice Number**. This navigates you to the **invoice detailed view** that allows you to see details including all the Order Lines associated to the invoice. You can then click the Order Number from here if you want to see more details about the order.

Payments

You will continue to receive payments by Electronic Funds Transfer (EFT) deposited directly to your bank account.

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:

▸ Payment Method

▸ Payment Number

▸ Payment Date

▸ Payment Amount

You can also use the **Recently Completed Invoices** link on the home screen or at the top of the My Invoices/Payment screen 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 and remove access to the Portal for users in their organization.

BCeID Requirements

To add a new user to the Portal, they will 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 (1-888-356-2741, 8:30 am – 5:00 pm PST, Monday to Friday, excluding statutory holidays).

User Administration in the Portal

The Delegated Administrator for your program can add 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. There are two options available:

‣ Modify user

‣ Add user

Adding Portal access for a user

To add a user, click on the **Add User** link, located under the "User Administration Tab".
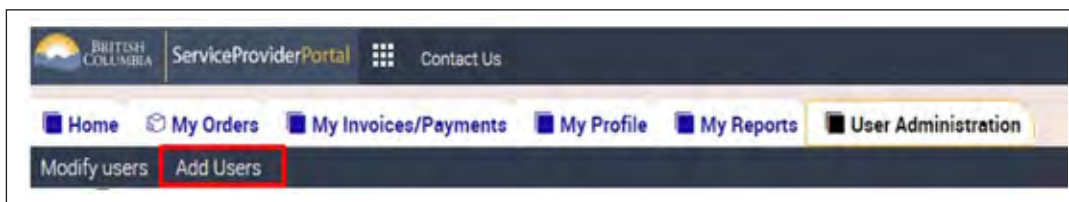
You will then be navigated to the Add User screen. The Add User Administration view displays all the BCeID users set up on your BCeID account.
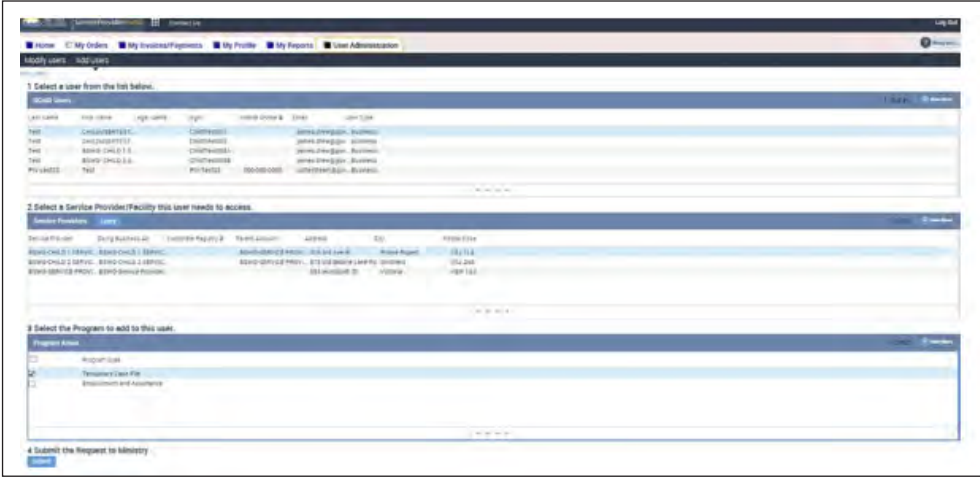
Step 1: To add a user, highlight the BCeID user from the first table.
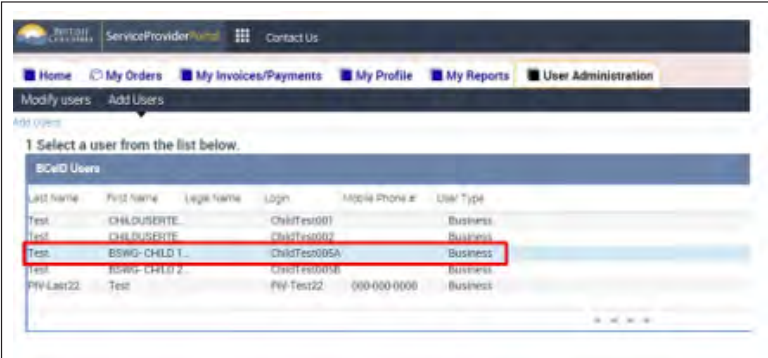
Step 2: Select the Service Provider/Facility you want the BCeID user to have access to.
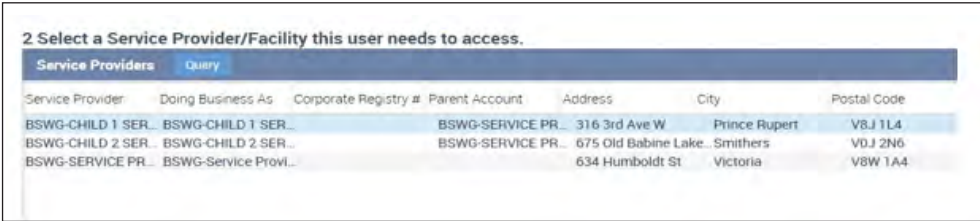
Step 3: Select the program areas you wish the BCeID user to have access to in the Portal.
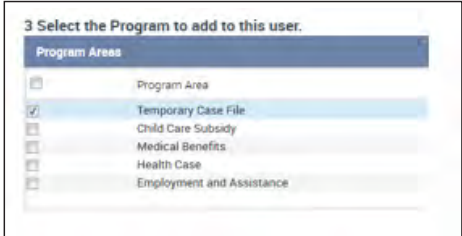
Step 4: Click the **Submit** button. The user will not have access to the Portal until the request is processed by the ministry. You will receive an email once your request has been processed.
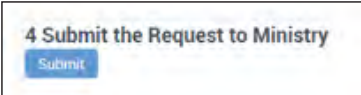
Modifying Portal access for a user

1. To modify a user's access to the Portal, navigate to the Modify users screen under the User Administration Tab
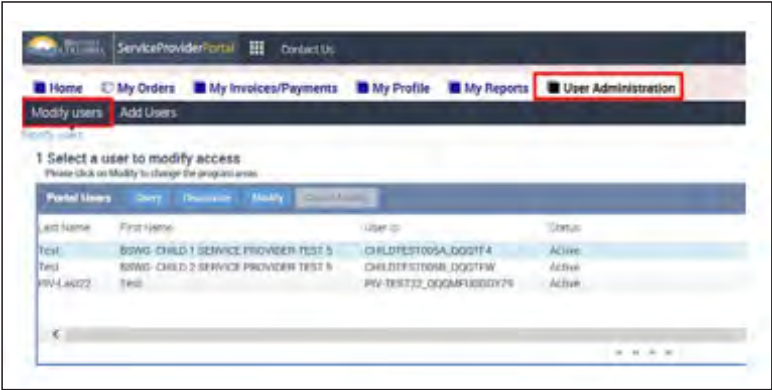
2. All the current Portal users associated to your organization will be listed in the first table. Select the one you wish to modify and click the **Modify** button. A warning message will pop up stating that the user's access to the Portal will be temporarily suspended until the request is complete.
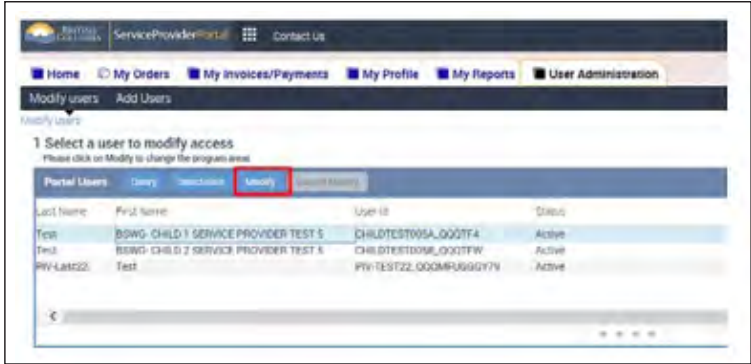
3. Select which program areas you wish to modify for the user to have access to.

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.

Changing the Delegated Administrator

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

Portal Frequently Asked Questions (FAQ)

Access & 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 though 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 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 am – 5:00 pm PST, 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**.

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 SDPR (see SDPR Contact Information on the last page of this guide).

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

A: If the client is no longer receiving services, do not bill for those orders. Please contact SDPR (see **SDPR Contact Information** on the last page of this guide) to advise that services have ceased and to have it noted on the client's file.

Invoice Frequently Asked Questions (FAQ)

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 (such as a phone or tablet) 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 7 or later; system is currently optimized for IE 8)
- ▸ Google Chrome (version 22)
- ▸ Firefox (15)

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 appropriate program 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 (i.e. landscape orientation, etc.).

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 SDPR as soon as possible (see **SDPR Contact Information** on the last page of this guide). 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 of 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 clients for whom your organization is authorized to provide services. This information is the same as what you currently receive in paper format (i.e. the name of the individual receiving service or the amount and types of service authorized).

There are validations in the Portal to calculate amounts correctly.

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 client, please contact SDPR (see **SDPR Contact Information** on the last page of this guide).

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 through the Portal, the invoice will be reviewed by ministry staff. Once the ministry approves the invoice, the invoice status changes to **Approved** in the Portal. invoices will update to **Paid** status once they are approved by the payment system and the payment will be generated within a few days. This means that you can see the date the payment will be made, in advance of the payment 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.

Q: I received a payment from SDPR 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 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 SDPR (see **SDPR Contact Information** on the last page of this guide) 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 log in 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 Administrator 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 Administrator 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.

SDPR Contact Information

Telephone Numbers: Toll Free in BC 1 866 866-0800
Fax Number: 1 866 399-9350
Website: Portal Log in link: icm.ext.gov.bc.ca/epsPortal_prd