

Finance

SERVICE PROVIDERS



Community Care **NB**
Soins Communautaires

| USER GUIDE |

Version 0.3

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CONFIDENTIAL STATEMENT

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Version & Document Control Table

This version control table provides historical data about each update made to a document. It is useful to include the author, date and notes about each change made to refer back to what these changes were.

| Version Control | | | |
|------------------------|---------------|-------------|---|
| Version | Edited | Date | Changes |
| 0.1 | Amy Michaud | 05/31/2024 | First Draft |
| 0.2 | Amy Michaud | 07/25/2024 | Added Confidential statement and versions. |
| 0.3 | Amy Michaud | 09/20/2024 | Update Screenshots to accommodate UI changes / included error message for Basic Units and Stat Holiday Units / Updated Error sheet to include kilometer mismatch validation |
| | | | |

MODULE A3 –FINANCE

PURPOSE: Become familiar with the background and concepts of the CCNB platform in relation to Service Confirmations.

Module Overview

While working in CCNB in the Finance persona, you will have access to various functions and features. These functions and features will help support you during the service confirmation process (e.g., ability to validate and receive a detailed error message if/when it fails). CommunityCareNB also provides you with the ability to log change requests in the event that the service unit amount (i.e. day, week, hour, etc.) does not align with the amount received for that payment cycle.

Service Confirmations

When services that have been provided by an agency are ready to be confirmed and processed for payment, the following steps will need to be completed:

- a. **First Step:** Identify the services that require billing and generate a list of all services that are active for the time frame (e.g., last week, last month).
- b. **Second Step:** Create the file to enter the ‘actual’ hours/units etc.
- c. **Third Step:** Validate the information (the system will check for errors), and the final step is to submit. Submission will send the file directly to Service NB for payment.

Notes on Service Confirmations:

- Service Confirmations can be submitted at any time.
- Ability to submit multiple confirmations (e.g., March 1 submission, April 1 submission)
- If a service needs to be changed, a new service request is generated and requires acceptance by the service provider and Social Development to activate.
- Hours/units are calculated monthly. If you submit weekly, each submission draws from the monthly amount. You will not be able to submit for more than the monthly approved amount, however, variation across weeks to reflect actual service variation is permitted. For example, if you are approved for 120 hours per month with the expectation of 30 hours per week, it is acceptable to submit 25 in the first week, 35 in the second week, 30 and 22 for the following.
- **Service Confirmations cannot cross months.** Multiple service confirmations can be submitted. For example April 1 to April 30th can be submitted. April 15 to May 15 cannot be submitted. April 15-April 30 can be submitted and May 1- to May 15 can be submitted.
- You are confirming services rendered, not those approved. It is fraud to claim to have provided services that were not rendered to the client. Falsely claiming services rendered violates the service agreement and can result in termination of the service agreement.

Follow the steps below to learn how to:

Click on any of the topics to be immediately redirected to the section in this user guide.

- [Access Service Confirmations](#)
- [Create Service Confirmation List](#)
- [Complete Service Confirmation Information](#)
- [Open Draft Service Confirmations](#)
- [Download Service Confirmation Items \(CSV\)](#)
- [Upload Service Confirmation Items \(CSV\)](#)
- [Verify service confirmations](#)
- [Confirm service confirmations](#)

Service Confirmations Tab Overview

Select this button to begin creating a new service confirmation.

Use refresh to ensure that the latest changes are displayed.

| Service C... | Vendor Confirma... | Service P... | Service P... | Total ... | State | St... |
|-----------------------------|--------------------|--------------|--------------|-----------|-------------------|-------|
| SC-00000002 | 111 | 2024-06-10 | 2024-06-14 | \$130.88 | Processed | 🔒 |
| SC-00000007 | 1234 | 2024-07-01 | 2024-07-01 | \$0.00 | Failed Validation | 🚫 |
| SC-00000008 | 12345 | 2024-06-18 | 2024-06-29 | \$0.00 | Draft | 🔄 |

Select a hyperlink to open and view Service Confirmation details.

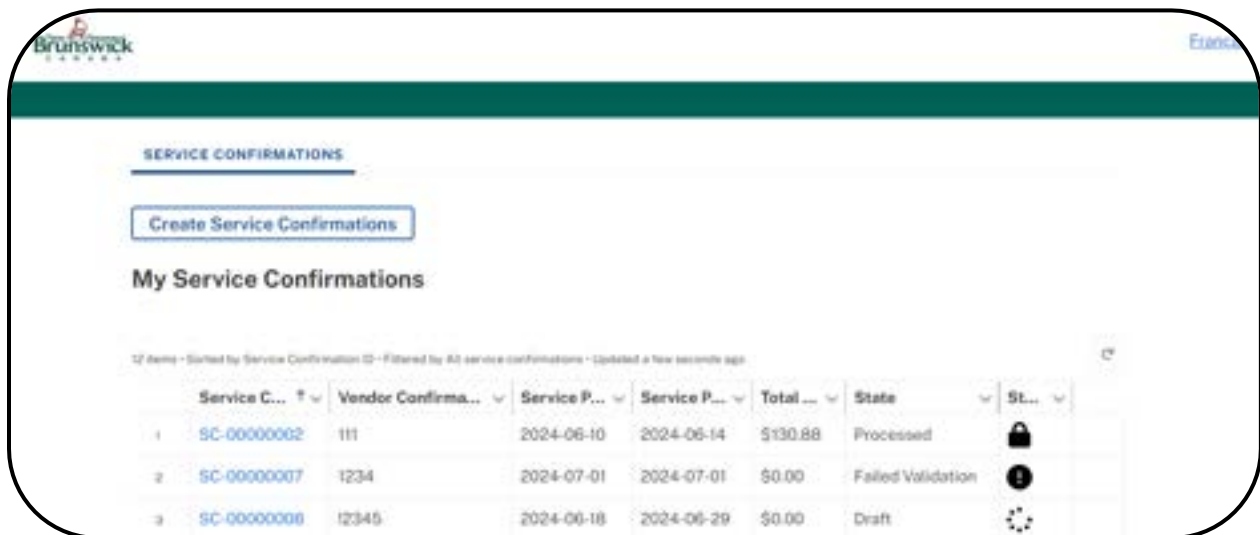
These columns display the state and status (*icons*) of a Service Confirmation.

How to Access Service Confirmations

1. When logged in, you will have one or two options (depending on your permission setting). There are three user types: a) coordination, b) finance, and c) coordination + finance. Select the **Service Confirmation** tab.

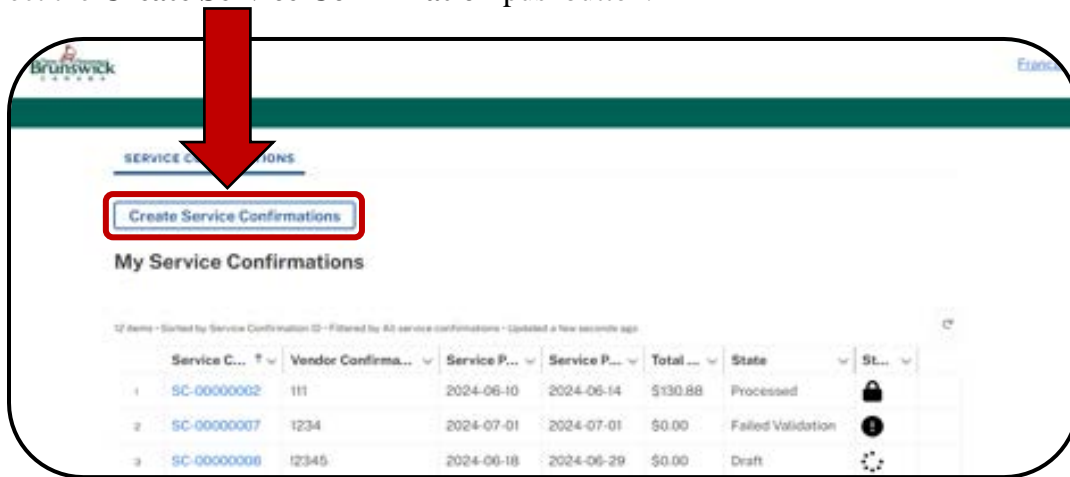


2. The Service Confirmation window is now open.



How to Create Service Confirmation List

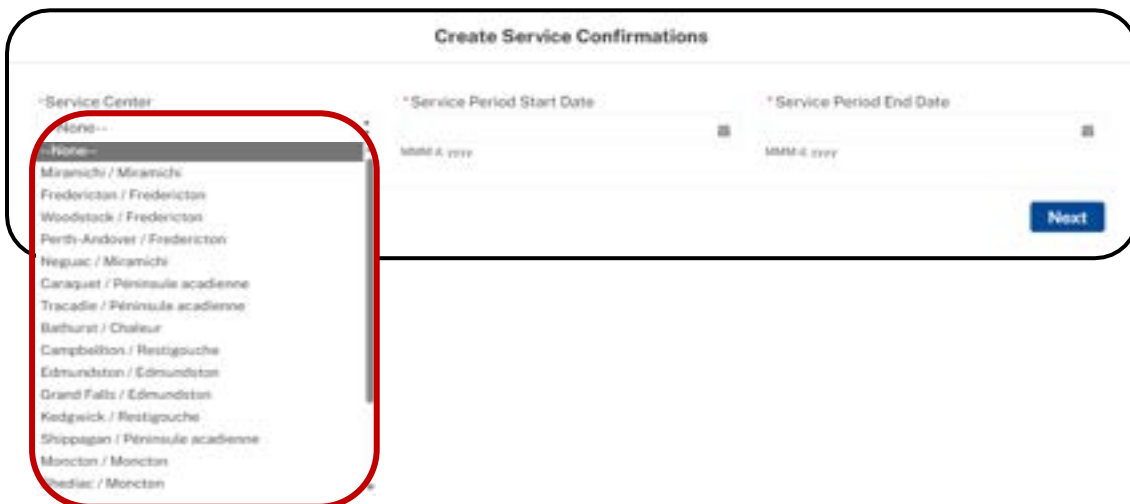
1. Select the **Create Service Confirmation** pushbutton.



2. The **Create Service Confirmation** window appears (i.e., Service Center, Service Period Start Date and End Date).



3. Select the **Service Center** (area of the province in which service was delivered) from the dropdown menu.



4. Select the **Service Period Start** and **End Date** (e.g., weekly, monthly).

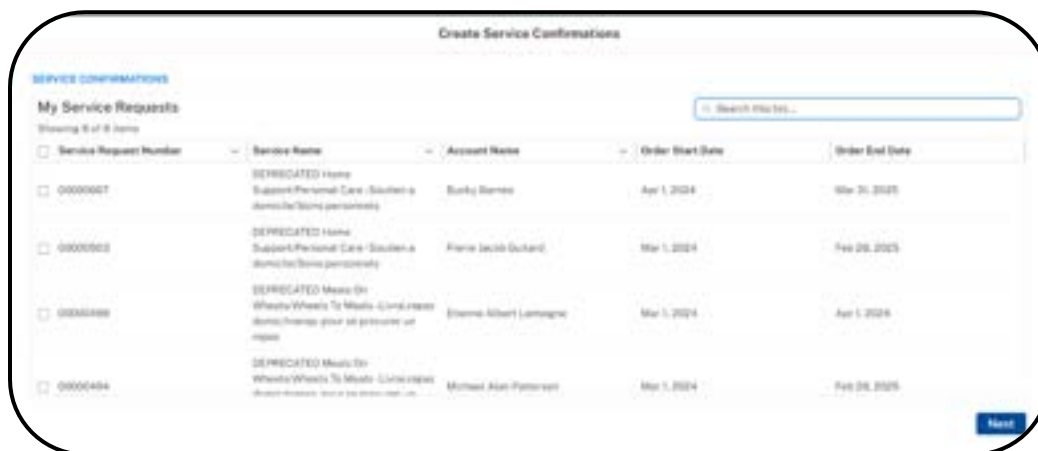


NOTE: You will receive an error message if:

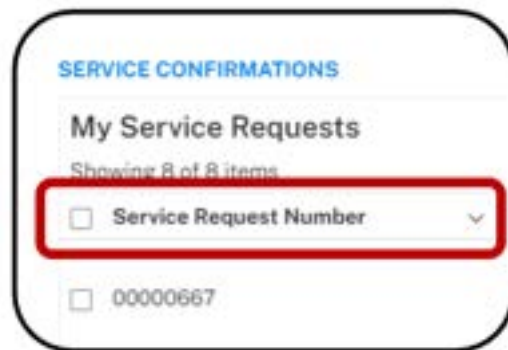
- a) Service End Date is in the future.
- b) Service Start Date is more than a year in the past.
- c) Service Start and End Date are not in the same month of same year.

5. Once completed, click the **Next** pushbutton.

6. The **My Service Request** window is displayed. From here, you will select all service requests that apply for the Service Period that was captured on the previous window.



- If all Service Requests should proceed for payment, select the **checkbox** next to **Service Request Number** row and all Service Requests will be selected.



- Once all Services that require payment have been selected, click the **Next** pushbutton.
- Enter your **Vendor Confirmation Number** (i.e., *invoice number*). Click **Next**.



- The **Created Service Confirmation** is displayed in the list. **State and Status in draft**. If new confirmation ID does not appear in the list, click the refresh button at the top right of the table.

The screenshot shows a table with the following columns: Service Conf., Vendor Confirmatio..., Service Per..., Service Per..., Total C..., State ↑, and Status ↓. The table contains four rows of data. A red rectangular box highlights the 'State' and 'Status' columns for the first three rows. The first three rows have a 'State' of 'Draft' and a 'Status' of a circular refresh icon. The fourth row has a 'State' of 'Failed Validation' and a status icon with an exclamation mark.

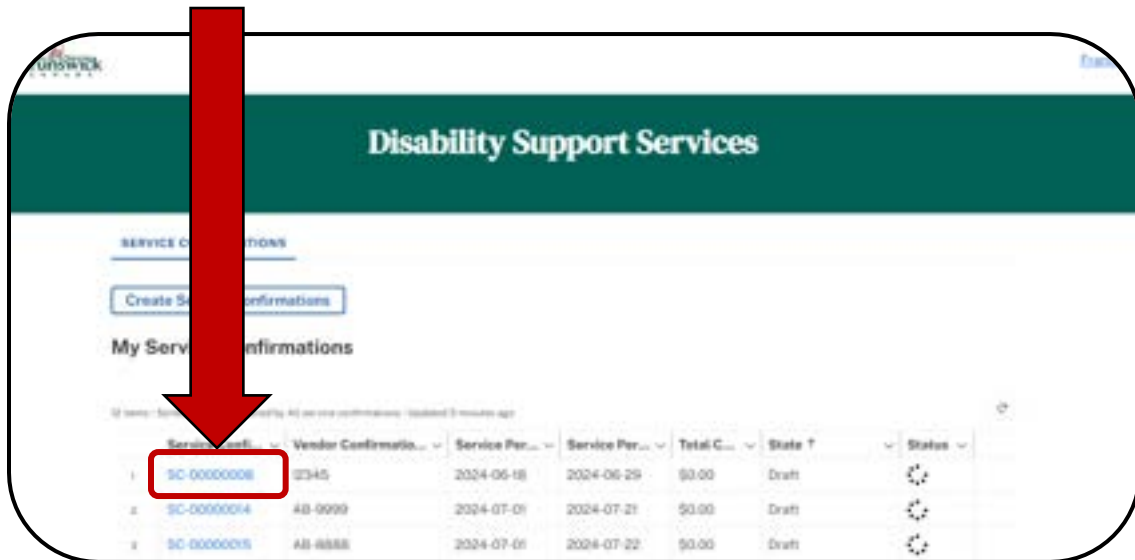
| | Service Conf... | Vendor Confirmatio... | Service Per... | Service Per... | Total C... | State ↑ | Status ↓ |
|---|-----------------|-----------------------|----------------|----------------|------------|-------------------|----------|
| 1 | SC-00000008 | 12345 | 2024-06-18 | 2024-06-29 | \$0.00 | Draft | Refresh |
| 2 | SC-00000014 | AB-9999 | 2024-07-01 | 2024-07-21 | \$0.00 | Draft | Refresh |
| 3 | SC-00000015 | AB-8888 | 2024-07-01 | 2024-07-22 | \$0.00 | Draft | Refresh |
| 4 | SC-00000007 | 1234 | 2024-07-01 | 2024-07-01 | \$0.00 | Failed Validation | Alert |

NOTE: You will receive an error message if:

- The same Vendor Confirmation Number is used for another Service Confirmation

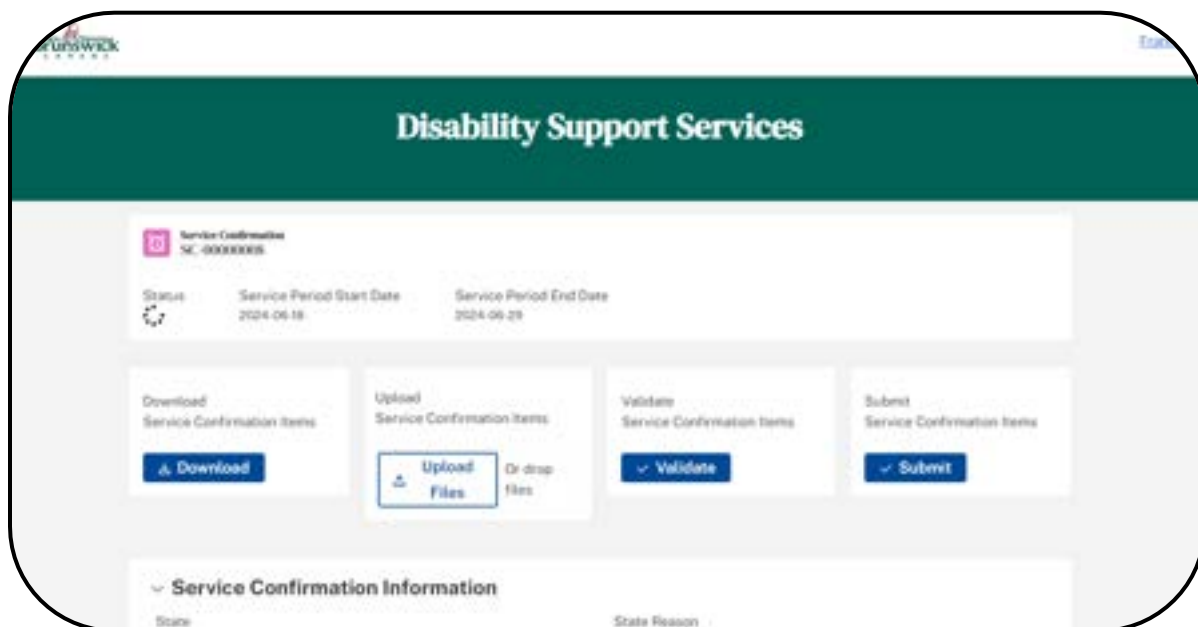
How to Open Draft Service Confirmation

1. Select the **Draft Service Confirmation ID**.

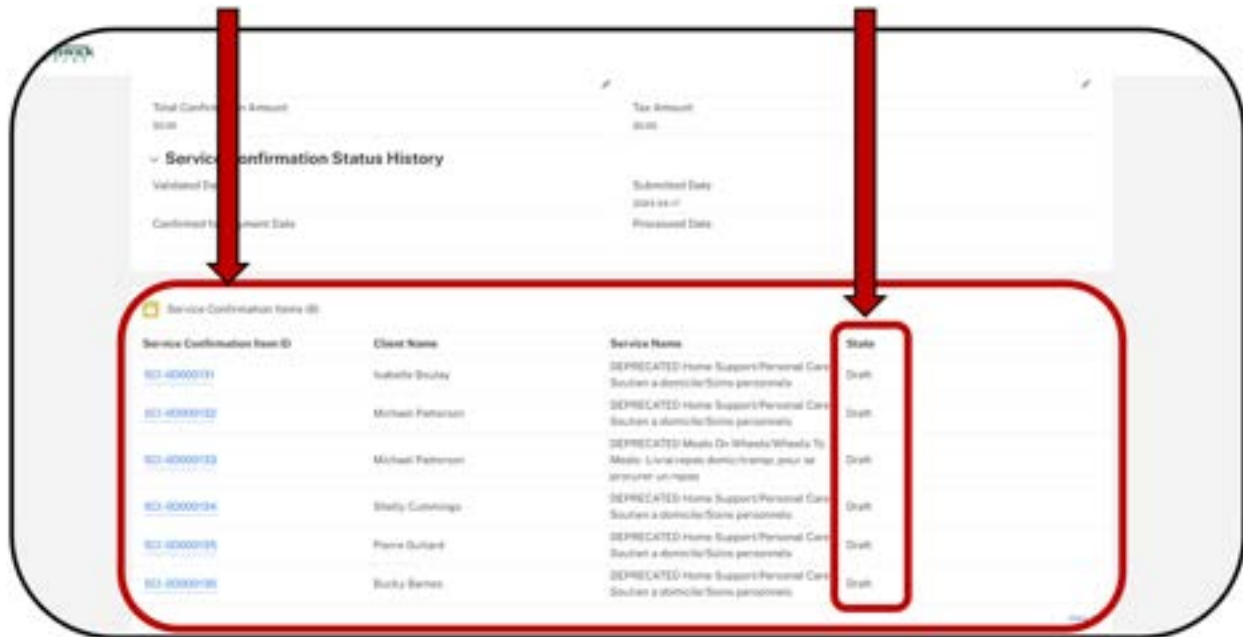


2. The **Service Confirmation** detail window opens. From this window, you can download, upload, validate and submit Service Confirmation Items. Additionally, this window provides information on the Service Confirmation (e.g., state, Tax Amount, HST GST ID, etc.)

You will go through a step-by-step process, completing each of these actions in sequence; download, upload, validate, and submit.



3. Scroll to the bottom of the page. From there, the Service Confirmation Items are displayed, and the *State* of these items are in **Draft**.



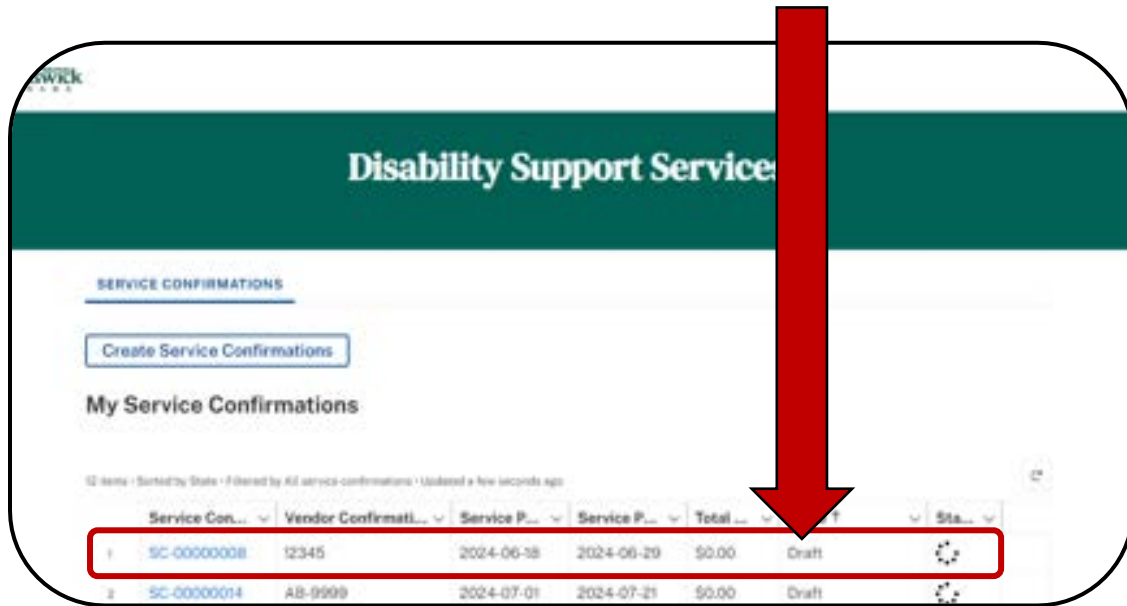
4. Select **View All** to display all Service Confirmation Items.

NOTE: The State column is very important. If at any point an item did not properly validate, this column will help to indicate which item needs correction, also prompting you to take the necessary steps (e.g., log a change request to a client’s service(s)).

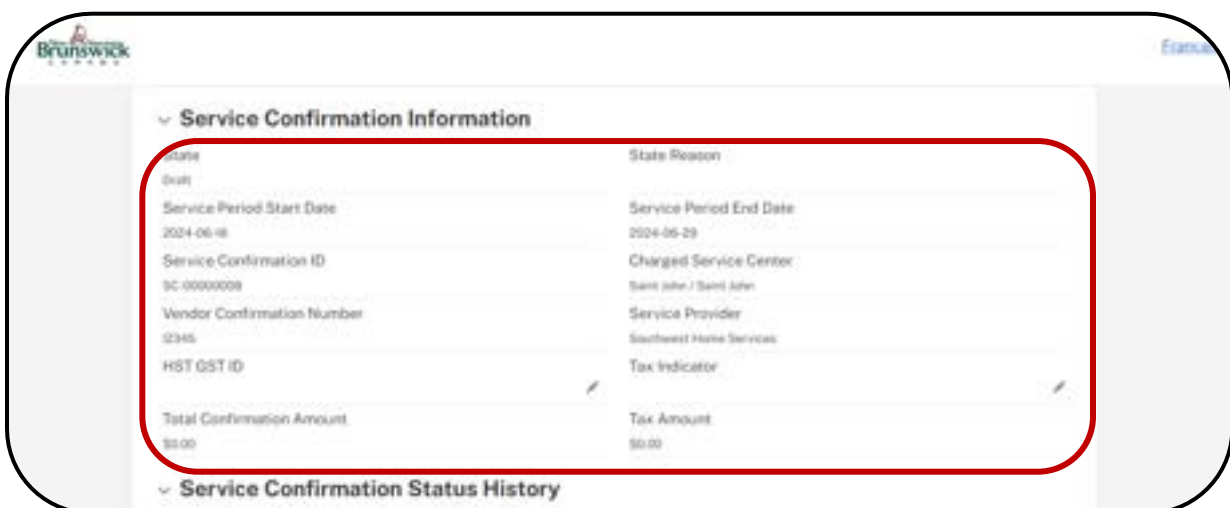
How to Add Tax & HST GST ID

Tax Indicator and HST GST ID will be required prior to submitting any Service Confirmation – the **Tax Indicator is a mandatory field**. This section of the guide will show you where to find these fields and capture information.

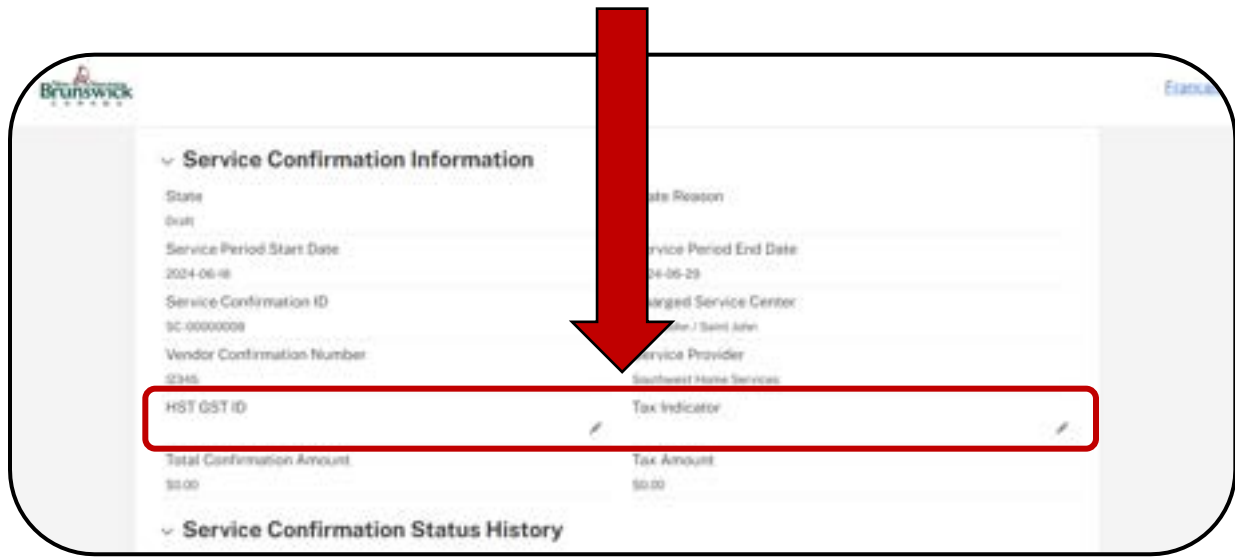
1. From the Service Confirmations List, open the **Draft Service Confirmation**.



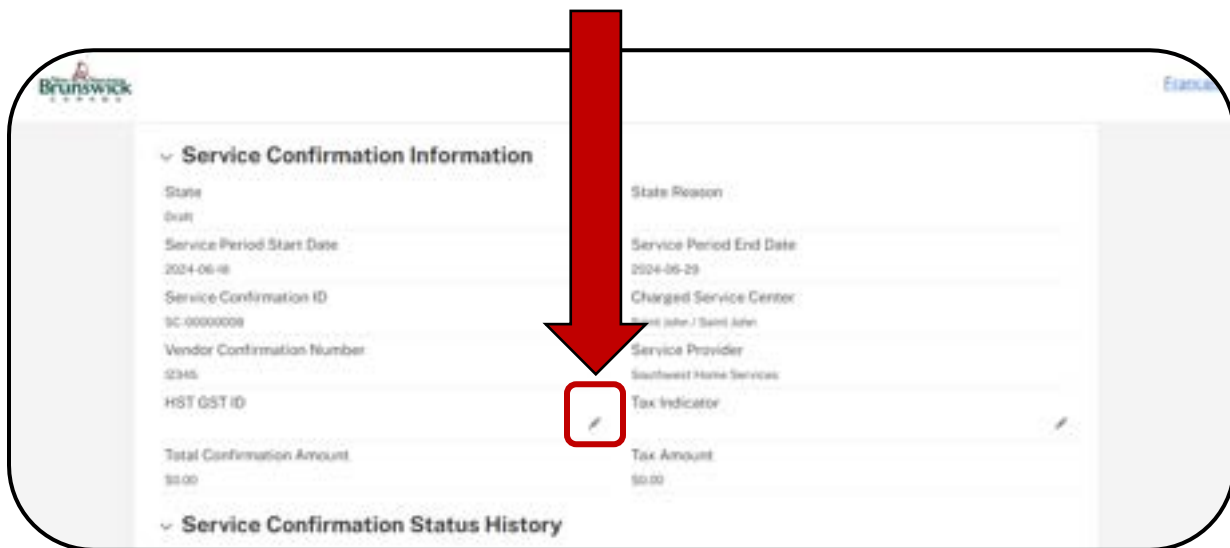
2. Once opened, scroll down to view the **Service Confirmation Information** fields.



3. Locate the **HST GST ID** and **Tax Indicator** fields.



4. Select any **Pencil Icon** to open the editable fields.



5. The editable fields are now open.

6. Enter the **HST GST ID** (*if applicable*) in the corresponding field.

The screenshot shows the 'Service Confirmation Information' form. A large red arrow points down to the 'HST GST ID' field, which is highlighted with a red rectangular box. The form contains the following fields and values:

| | |
|--|--|
| State | State Reason |
| Shift | |
| Service Period Start Date 2024-06-18 | Service Period End Date 2024-06-29 |
| Service Confirmation ID SC-00000008 | Charged Service Center Saint John / Saint John |
| Vendor Confirmation Number 02345 | Service Provider Southwest Home Services <small>This field is calculated upon save</small> |
| HST GST ID | Tax Indicator --None-- |
| Total Confirmation Amount \$0.00 <small>This field is calculated upon save</small> | Tax Amount \$0.00 <small>This field is calculated upon save</small> |

Buttons: Cancel, Save

7. Select the applicable **Tax Indicator** from the dropdown menu.

The screenshot shows the 'Service Confirmation Information' form with the 'Tax Indicator' dropdown menu open. A large red arrow points down to the dropdown menu, which is highlighted with a red rounded rectangular box. The dropdown menu lists the following options:

- None-- (selected)
- F-Full
- N-No Tax
- O-Out of Province
- P-Partial

Buttons: Cancel, Save

NOTE: You will receive an error message if:

- a) Missing Tax Indicator
- b) Missing HST GST ID (if applicable)

8. Click the **Save** button.

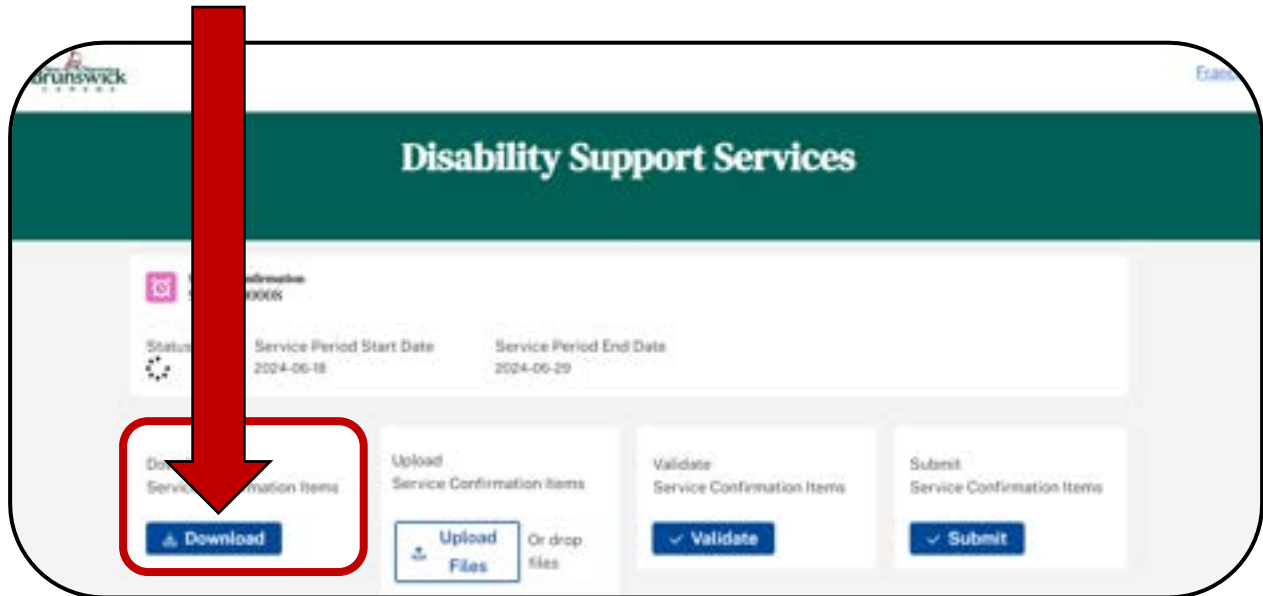
The screenshot shows a web form titled "Service Confirmation Information" with the Brunswick logo in the top left. The form is divided into two columns. The left column contains fields for State (Draft), Service Period Start Date (2024-06-18), Service Confirmation ID (SC-0000000), Vendor Confirmation Number (0245), and HIST GST ID. The right column contains fields for State Reason, Service Period End Date (2024-06-29), Charged Service Center (Saint John / Saint John), Service Provider (Southwest Home Services), and Tax Indicator (a dropdown menu set to "N - No Tax"). Below these columns are fields for Total Confirmation Amount (\$0.00) and Tax Amount (\$0.00). At the bottom of the form, there is a "Service Confirmation Status History" section with "Cancel" and "Save" buttons. The "Save" button is highlighted with a red rectangle.

9. The window refreshes and the changes made are now displayed.

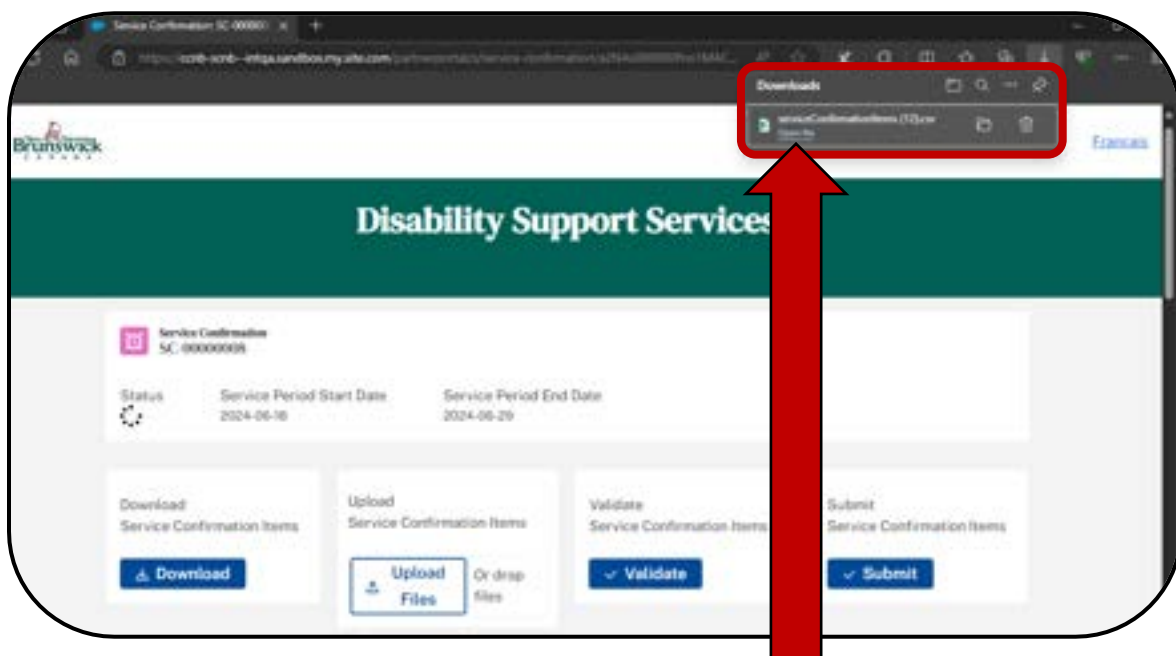
This screenshot shows the same "Service Confirmation Information" form after it has been saved. The data is now displayed in a read-only format. The HIST GST ID field is highlighted with a red rectangle. The "Save" button is no longer visible, and the "Cancel" button is now disabled. The rest of the form content remains the same as in the previous screenshot.

How to Download Service Confirmation Items & Provide Required Information (CSV)

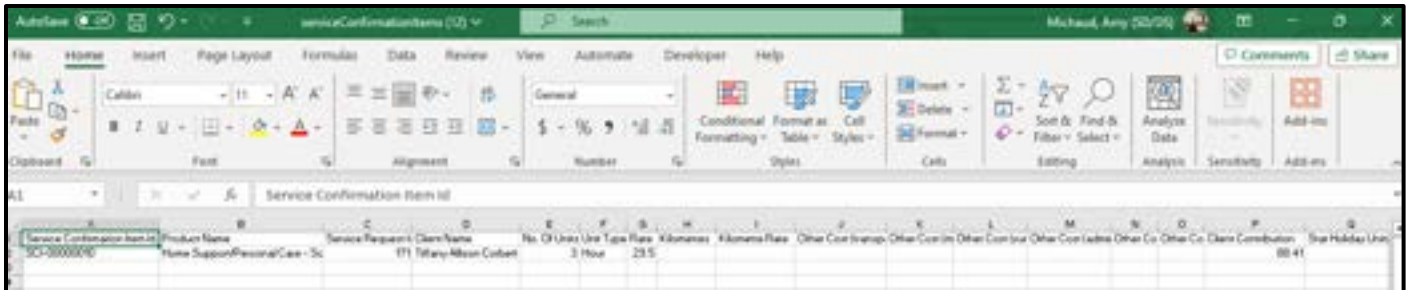
1. From the Service Confirmation (*draft*) window, select the **Download** pushbutton to download the **Service Confirmation Item file**.



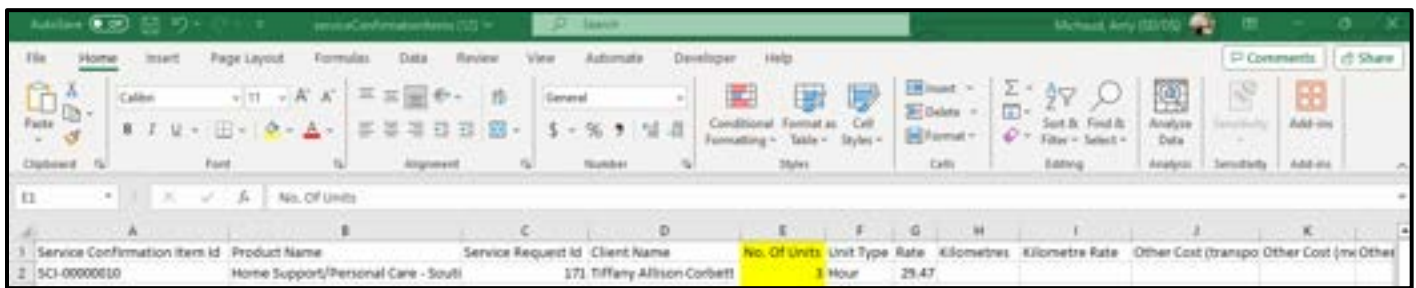
2. The **File** is downloaded. To **Open the File**, select the **Open File** hyperlink from the popup window in the top right corner of your browser.



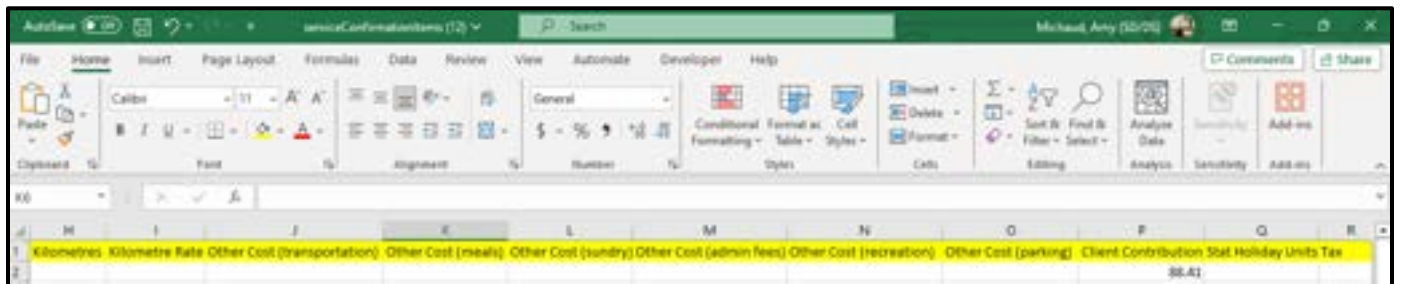
- The file opens with the **Service Confirmation Item ID, Product Name, Service Request ID, Client Name, Unit Type, and Rate** already filled in.



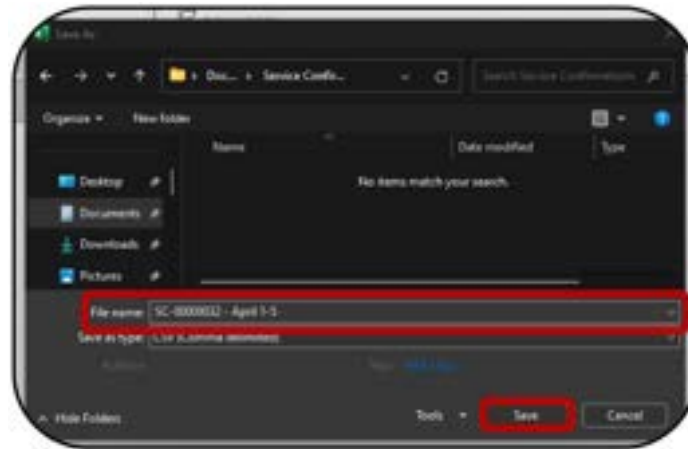
- Enter the **No. of Units** (e.g., hours, days, etc.) that the client received for the indicated service period (e.g., week, month).



- Enter any additional information within the spreadsheet, that is; you must fill in other costs (if approved), Stat. Holidays (if approved/included in service request), client contribution (if applicable/approved), GST/Tax. **Ensure that all fields/columns have been given a value (e.g., 0 if no value is applicable or exists), otherwise it will fail validation.**



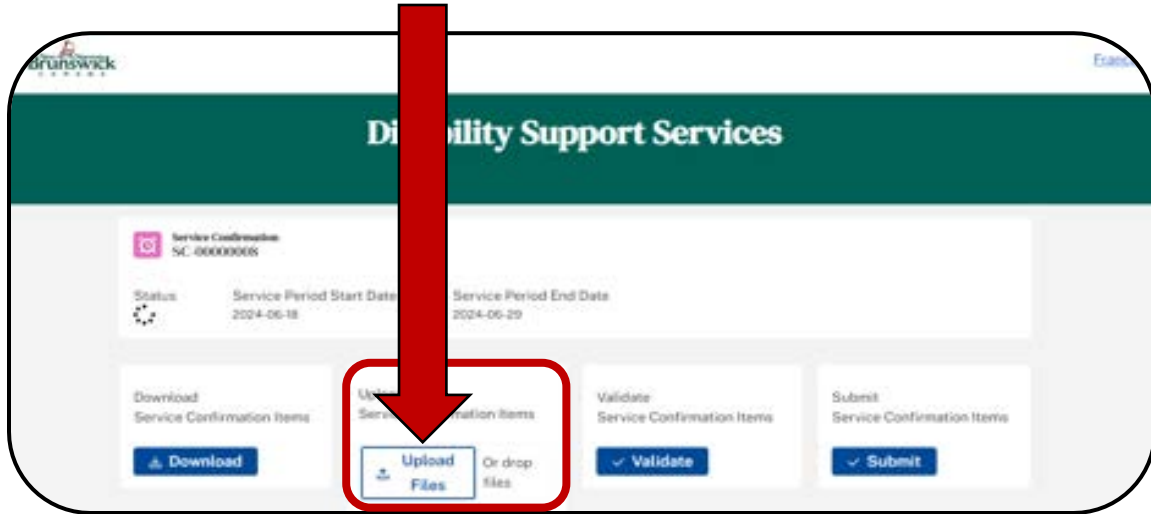
6. Save the File to your computer in a designated folder (e.g., Service Confirmations) and with an easily identifiable name, ensuring that the Service Confirmation ID is included (e.g., SC-00000032 - April 1-5). **Click Save.**



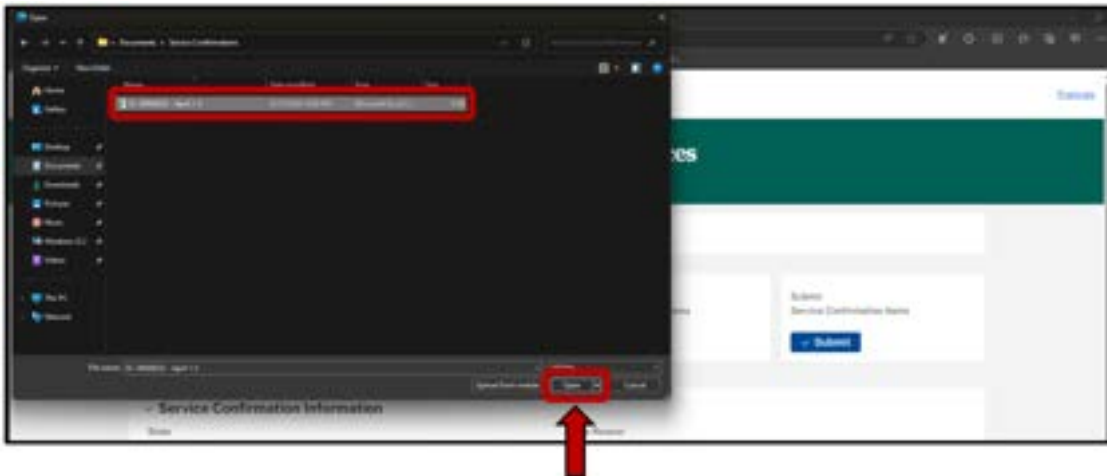
7. The Service Confirmation items are now captured, saved and ready to be uploaded to related Service Confirmation draft for information validation.

How to Upload Service Confirmation Items (CSV)

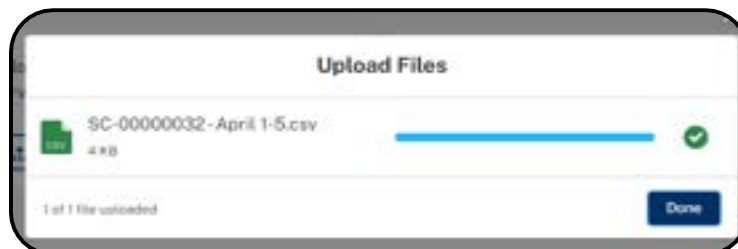
1. On the applicable Service Confirmation (*draft*) window, select the **Upload** pushbutton **OR** drag and drop the file.



2. **Locate** the Service Confirmation Items file and select **“Open”** to begin the upload process.

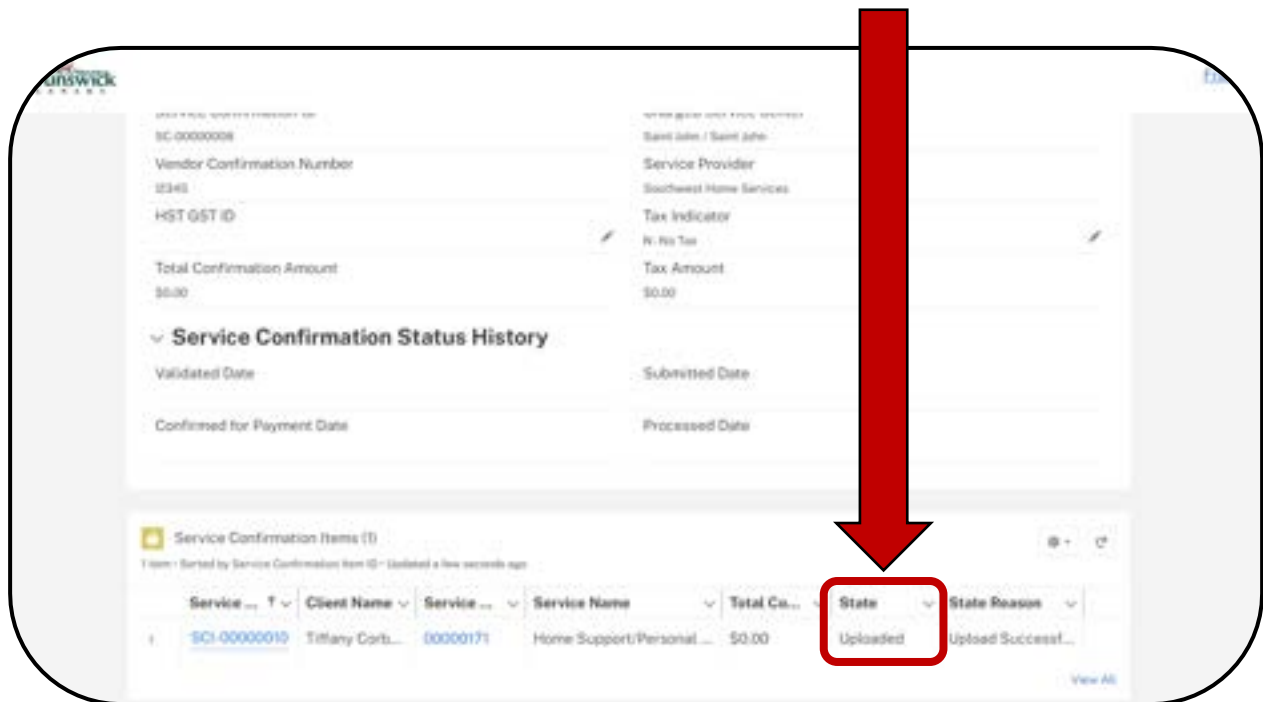


3. Wait for the **Green Checkmark**, signaling that the file has successfully uploaded, and click the **Done** pushbutton.



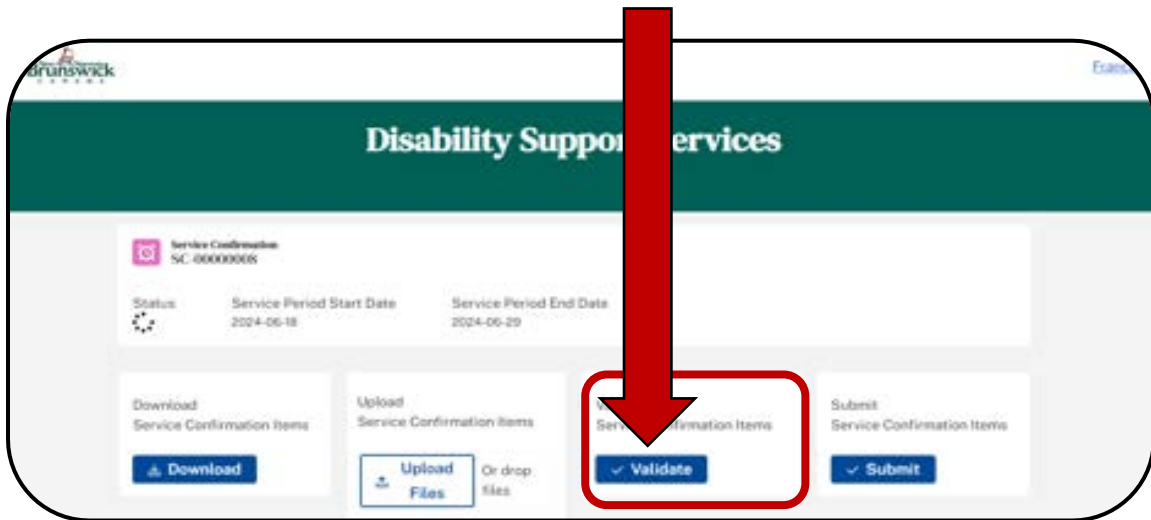
NOTE: You will receive an error message if:

- a. Uploaded the wrong CSV file to a Service Confirmation
4. A confirmation message appears.
 5. Scroll down and locate the Service Confirmation Items field. The **State** for each item will now display “uploaded”.

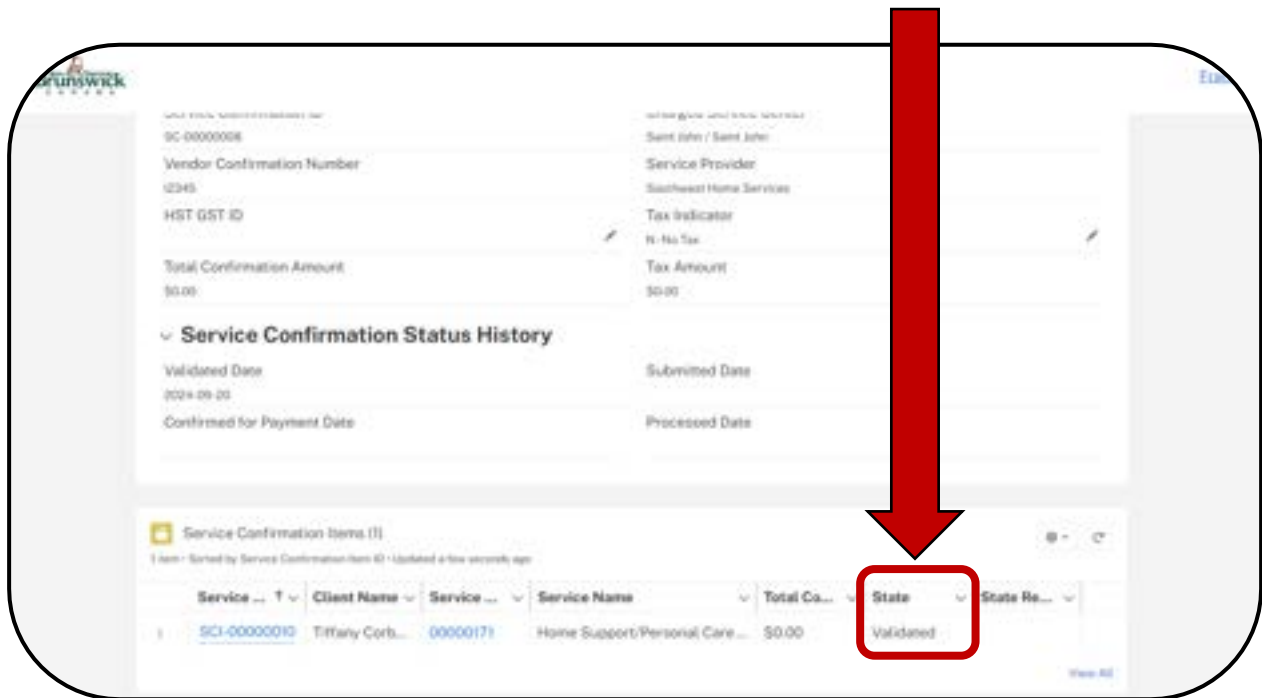


Validating Service Confirmation Items

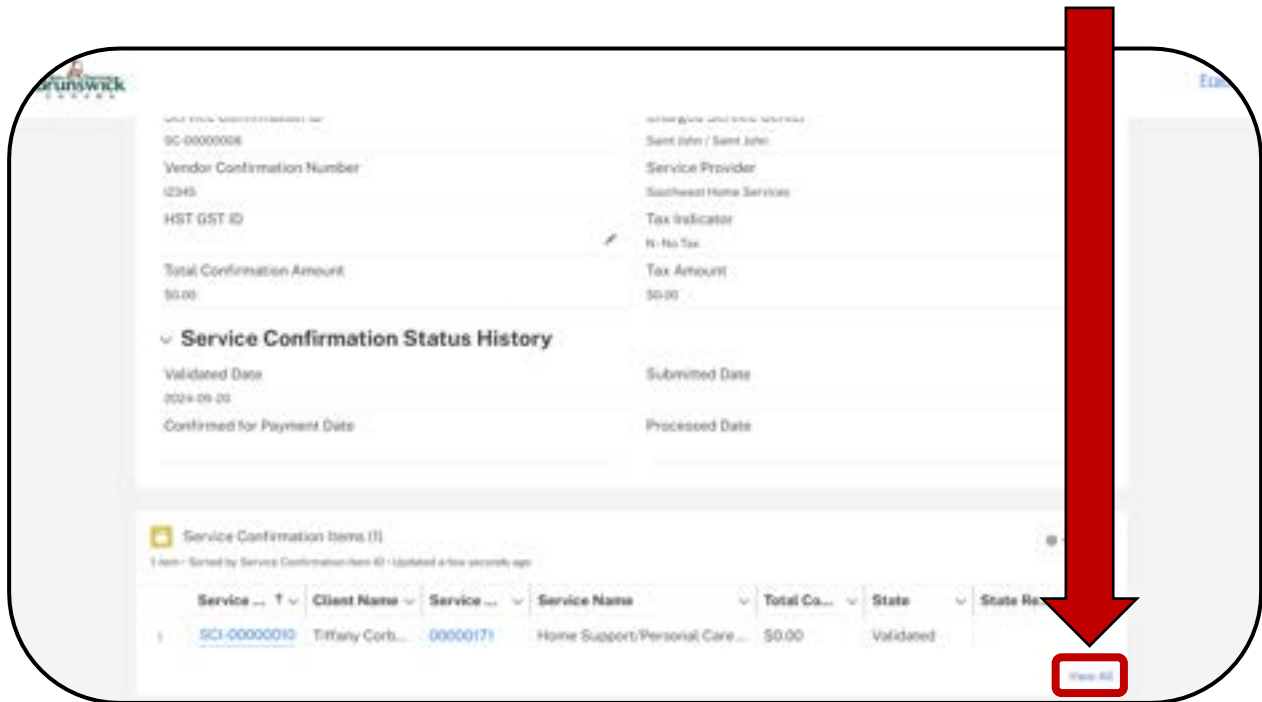
1. Once all items are up to date and the information provided is ready to be validated (e.g., the correct number of hours were entered into the Service Confirmation Items document), select the **Validate** pushbutton.



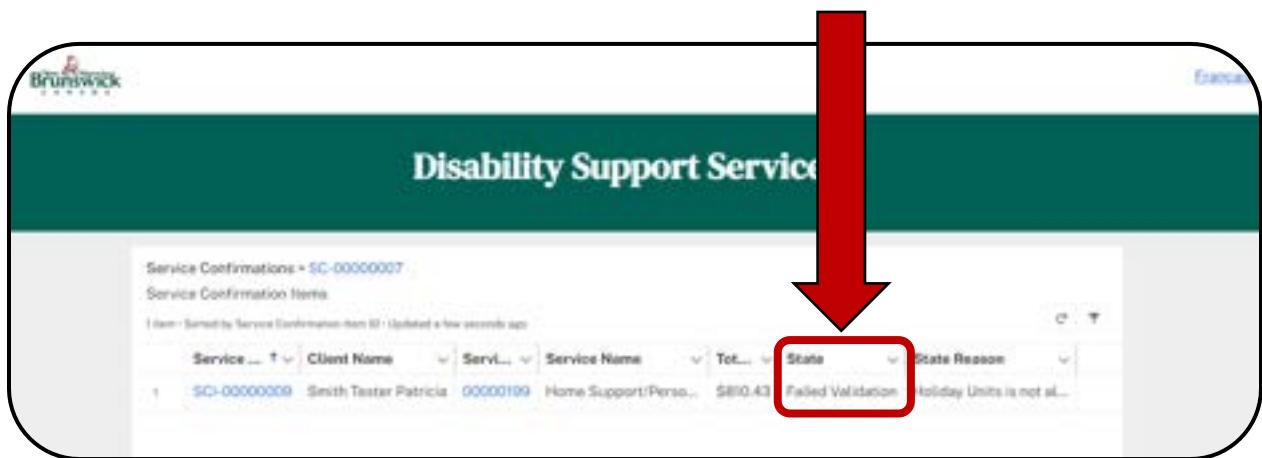
2. The page will refresh changing the **State** of all service confirmation items.



- If multiple Service Confirmation Items have been submitted, and not all displayed in the Service Confirmation Items field, select **View All**. This will display a list of **all** related service confirmation items.



- Review the **States** of all service confirmation items. Verify any items with a state of **Failed Validation** (re: [Failed Validations](#)).



TIP: Click the **State** column header to sort the list – it will place all Failed Validations together.

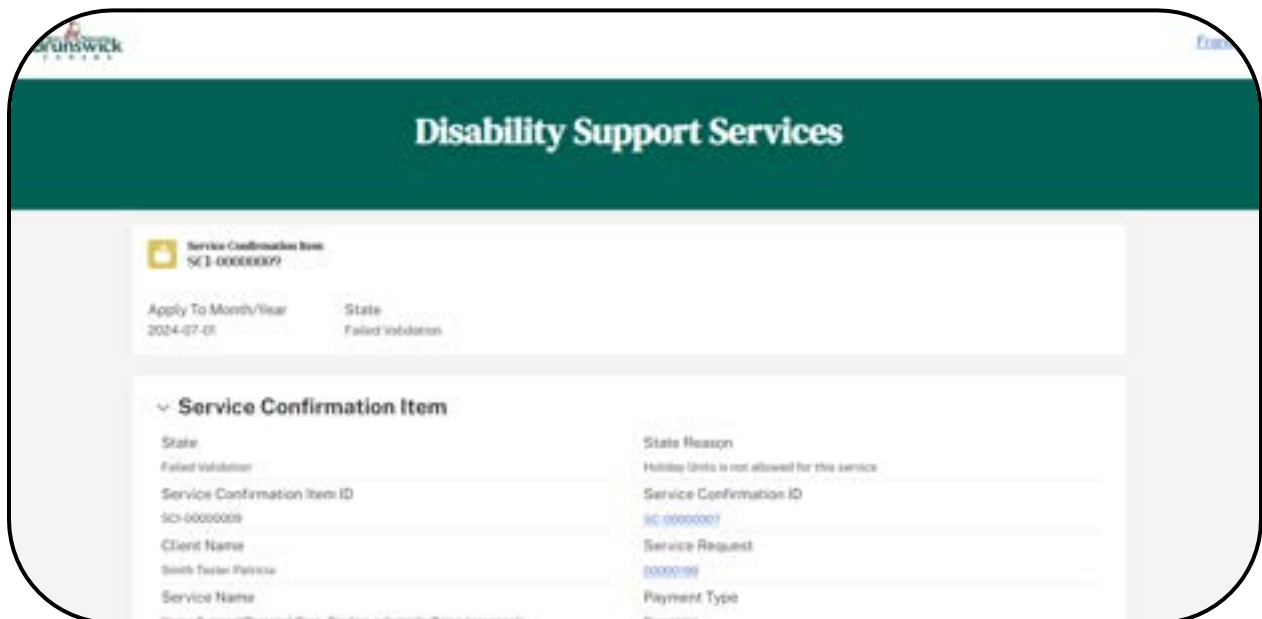
Failed Validations

When a validation fails, you will need to open the service confirmation item to view the reason it failed. Follow the steps below to open and view failed validation items.

1. From the Service Confirmation Items list (re: [step 3: view all](#)), select the **Failed Validation SC item number**.

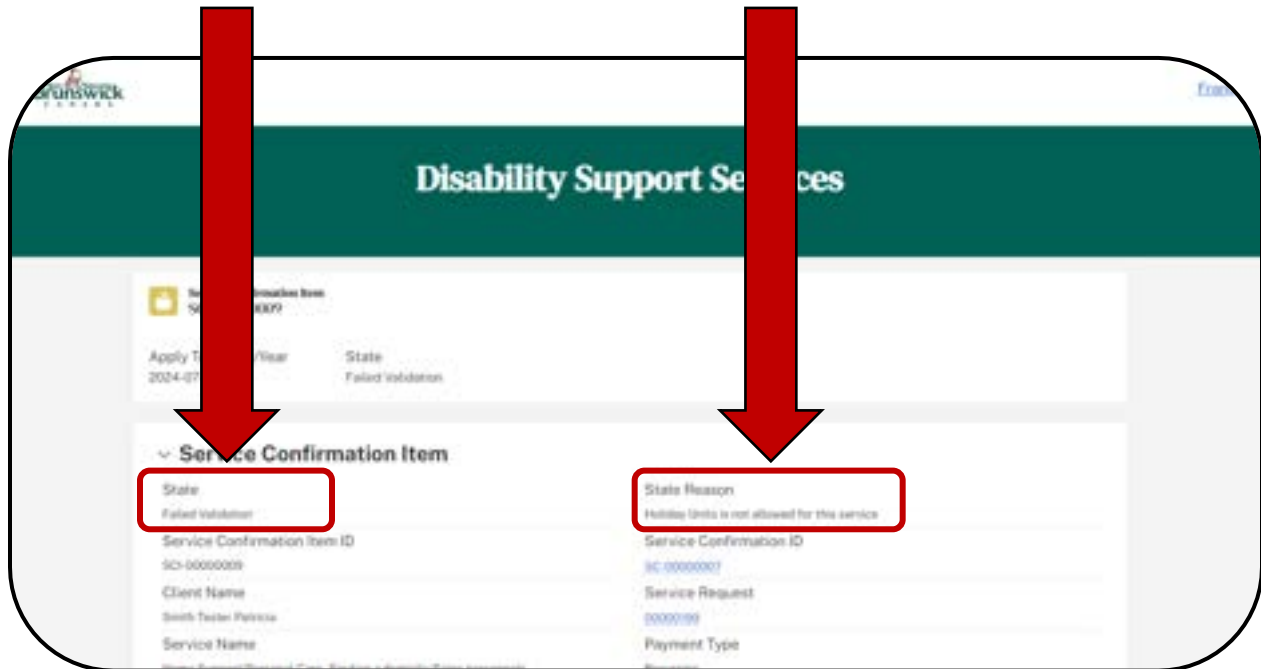


2. Service Confirmation Item details are displayed.



3. Locate the **State** and **State Reason**.

IMPORTANT: The **State Reason** will provide you an explanation for why the item failed. This will help guide you to make the necessary correction.



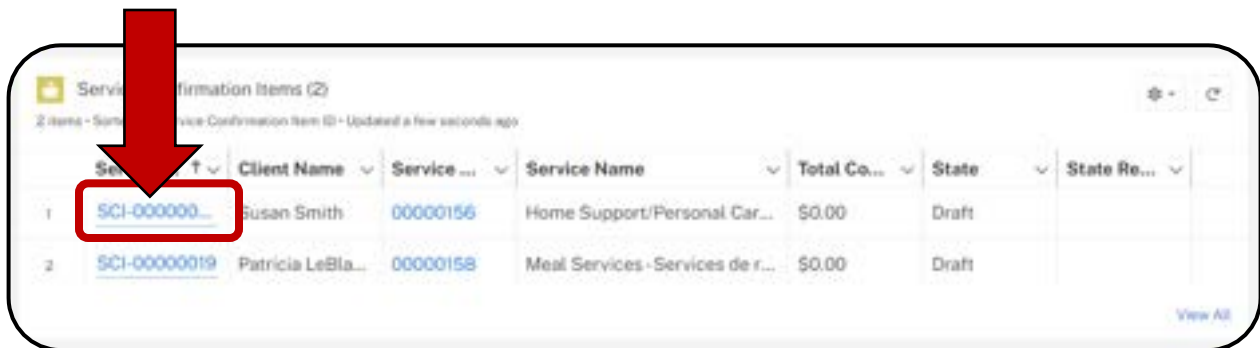
4. Re: [Errors & Failed Validation List](#) below to learn how to fix/correct a failed validation.

IMPORTANT: Different action will be taken depending on the failed validation. If information was entered incorrectly (e.g., wrong number of hours), the information can be adjusted (see steps below). If follow up is required with Social Development (e.g., discrepancy between our records), you may need to confirm the service at a later time but continue with submitting the remaining services.

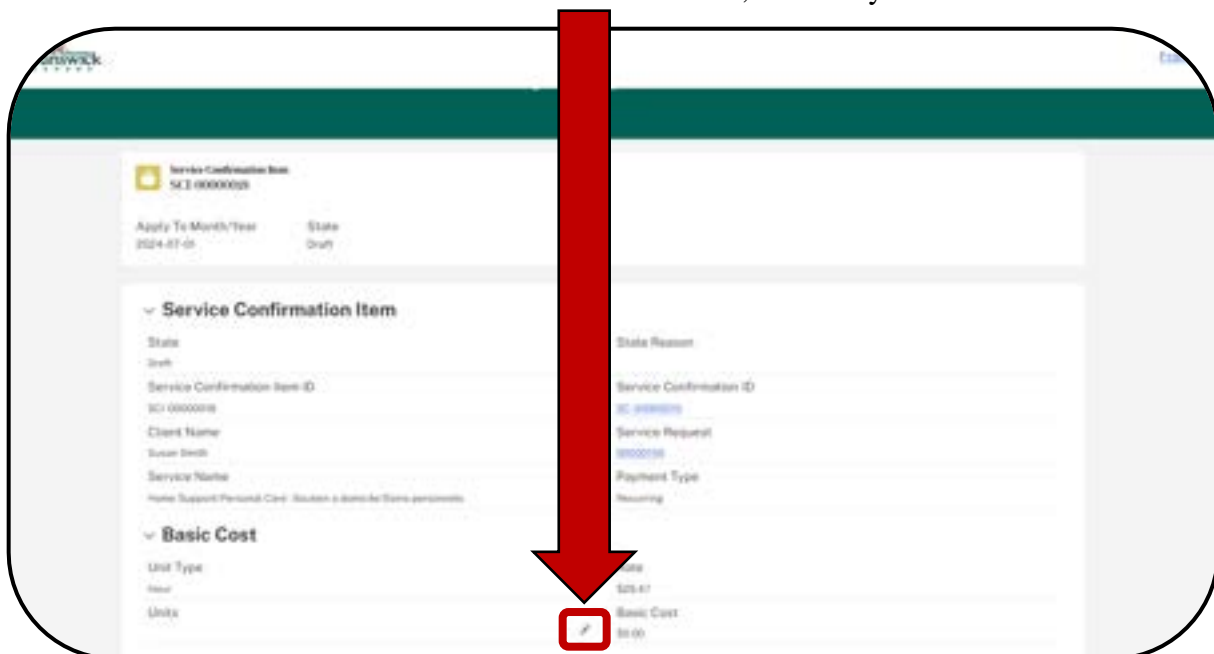
Capture/Modify Service Confirmation Items

If the amount of Service Request Items is small (e.g., 2 Service Confirmation Items), rather than downloading and uploading the CSV CCNB also allows for the information to be entered manually. Additionally, Service Confirmation Items can be edited in the event that updates to a Service Confirmation Item need to be made. Refer to the Service Request to review details of what has been approved by Social Development for payment. If a Service Request needs to be changed, contact the SD worker associated with the service request and log a Change Request. If a change is required a NEW service request will be issued.

1. From the Service Confirmation Items field or list (re: [step 3: view all](#)), select the applicable **Service Confirmation Item Number**.



2. From the Service Confirmation Item detail window, select any **Pencil Icon**.



- All editable/modifiable fields are now free to make changes.

The screenshot shows a web form for a service provider. At the top left is the 'Sunswick' logo. The form contains several sections:

- Service Name:** Home Support/Personal Care - Southern & domestic/Soins personnels. Below it is a note: 'This field is calculated upon save'.
- Payment Type:** Recurring.
- Basic Cost:**
 - Unit Type:** Hour.
 - Rate:** \$29.47.
 - Units:** An empty text input field.
 - Basic Cost:** \$0.00. Below it is a note: 'This field is calculated upon save'.
- Kilometer Cost:**
 - Kilometre Units:** An empty text input field.
 - Kilometre Rate:** An empty text input field.
 - Kilometre Cost:** \$0.00. Below it is a note: 'This field is calculated upon save'.
- Other Costs:** A section header with a downward arrow.

 At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

- Input the information into the applicable fields and **click Save**. The captured information has been saved.

This screenshot is identical to the previous one, but with the 'Units' field in the 'Basic Cost' section now containing the value '2.00'. The 'Units' field and its label are highlighted with a yellow background. All other fields and the overall layout remain the same.

NOTE: You will receive an error message if:

- Units or Stat Holiday Units are not entered in quarter, half or whole units (e.g., **quarter units: 3.25 / 3.50 / 3.75**).

Errors & Failed Validations

| Type | State Reason (Error) |
|------------------------|---|
| Validations for Upload | File is not in CSV format |
| Validations for Upload | File header is not correct |
| Validations for Upload | Upload doesn't match downloaded file template |
| Validations for Upload | Data type mismatch has occurred. |
| Validations for Upload | [column name] has a mismatch on column type |
| Validations for Upload | Record missing from upload file |

| • Type | • State Reason (Error) |
|--|--|
| • Validations for Service Confirmations (SC) | • Vendor Confirmation Number is missing. |
| • Validations for Service Confirmations (SC) | • Vendor Confirmation Number must be unique. |
| • Validations for Service Confirmations (SC) | • Missing tax indicator |
| • Validations for Service Confirmations (SC) | • Missing HST GST ID |

| Type | State Reason (Error) | Defined |
|--|----------------------------------|---|
| Validations for Service Confirmation Items | Service request is still active. | Service Request has not been cancelled since the Service Confirmation was created |

| | | |
|--|--|---|
| <p>Validations for Service Confirmation Items</p> | <p>Service Request is no longer active in the service period submitted.</p> | <p>Scenario: since downloading - the Order has been terminated.</p> <ul style="list-style-type: none"> • Today's date - Feb 16, • Downloaded on Feb 12 for Orders in service period Feb 1 - Feb 9. • Order 12345 was included in the download with service dates July 1, 2023 - June 30, 2024 • On Feb 14 - Social Worker received info to terminate this order as of Jan 31st • Order End Date is now Jan 31, 2024, which is less than the Apply To Month/Year (Feb 1, 2024) on the Service Confirmation. |
| <p>Validations for Service Confirmation Items</p> | <p>Client Contribution:</p> <ol style="list-style-type: none"> 1. Client Contribution must be equal or less than Client Contribution recorded on the Order. | <p>IF the Basic Cost on the Service Confirmation Item is less than the 'remaining client contribution of the month',</p> <p>THEN Client Contribution Amount entered should be equal to the 'Basic Cost on Service Confirmation Item'.</p> |
| <p>Validations for Service Confirmation Items</p> | <p>Client Contribution:</p> <ol style="list-style-type: none"> 2. Client Contribution is equal to Basic Cost | <p>IF the Basic Cost on the Service Confirmation Item is less than the 'remaining client contribution of the month',</p> <p>THEN Client Contribution Amount entered should be equal to the 'remaining client contribution of the month'.</p> |
| <p>Validations for Service Confirmation Items</p> | <p>Basic Cost must be less than maximum monthly basic cost minus the already submitted basic cost</p> | <p>IF the Basic Cost on the Service Confirmation Item is <u>not</u> 0,</p> <p>THEN if <u>must</u> be less than the Monthly Max Basic cost amount minus the already submitted basic cost.</p> |

| | | |
|--|--|--|
| <p>Validations for Service Confirmation Items</p> | <p>Kilometer Cost must be equal or less than maximum monthly kilometer cost minus already submitted kilometer reason</p> | <p>IF the Kilometer Cost on the Service Confirmation Item is not 0,</p> <p>THEN it <u>must</u> be equal to <i>or</i> less than the Monthly Max Kilometer cost minus the already submitted kilometer cost.</p> <p>Example: Monthly Max Kilometer amount = \$500,</p> <ul style="list-style-type: none"> • 2 SC Items were previously submitted for Feb 1-9th for \$200 & Feb 10-23rd for 200 (total = \$400) • if Kilometer Cost of SC Item being validated is for Feb 24-29 for \$100 - this is OK (400+100 is <or = Monthly Max Kilometer 500) • if Kilometer Cost” of SC Item being validated is for Feb 24-29 is greater than \$100 - this is a fail. |
| <p>Validations for Service Confirmation Items</p> | <p>Kilometer has a mismatch on field type.</p> | <p>Kilometer Units must be entered as whole numbers (e.g., 150).</p> <p>The system will not validate decimal numbers (e.g., 150.26).</p> |
| <p>Validations for Service Confirmation Items</p> | <p>Other Costs must be equal or less than maximum monthly Other Costs minus already submitted Other Costs</p> <p>Other Costs could be</p> <ul style="list-style-type: none"> • Other Cost (transportation-other) • Other Cost (sundry) • Other Cost (meals) • Other Cost (admin fees) • Other Cost (parking) • Other Cost (recreation) | <p>Example: Monthly Max Other Costs amount = \$300</p> <ul style="list-style-type: none"> • 2 SC Items were previously submitted for Feb 1-9th for \$125 & Feb 10-23rd for 125 (total = \$250) • if 3rd confirmation is for Feb 24-29 for \$50 - this is OK (250+50 is less or = Monthly Max Other Costs 300) • if 3rd confirmation is for Feb 24-29 is greater than \$300 - this is a fail |
| <p>Validations for Service Confirmation Items</p> | <p>“Stat. Holiday Units” cannot be recorded if the Basic Cost is \$0</p> | <p>IF the Units on the Service Confirmation Item equals 0,</p> |

| | | |
|---|--|--|
| | | THEN Stat. Holiday Units on the Service Confirmation Item must equal 0. |
| Validations for Service Confirmation Items | “Stat. Holiday Units” must not exceed the No. of Units | IF Stat. Holiday Units on the Service Confirmation Item is greater than 0, and IF Stat. Holiday Units on Service Confirmation Item is greater than Units on Service Confirmation Item, THEN Service Confirmation Item will fail validation. |
| Validations for Service Confirmation Items | “Stat. Holiday Units” is not allowed for this service | IF Stat. Holiday Units on the Service Confirmation Item is greater than 0, and IF Order/Service Request Type/Pay Statutory Days is not equal to Y THEN Service Confirmation Item will fail validation. |
| Validations for Service Confirmation Items | “Stat. Holiday Units” is incorrect (max 24) | IF Stat. Holiday Units on the Service Confirmation Item is greater than the allowable stat. holiday units, THEN Service Confirmation Item will fail validation. |
| Validations for Service Confirmation Items | Tax Amount is incorrect | IF Tax Amount on Service Request Item is greater than 0, AND Tax Indicator is F, AND Tax amount is not 15% of Basic Cost of Service Confirmation Item being validated, THEN Service Confirmation Item State will fail validation. |
| Validations for Service Confirmation Items | Departmental Cost cannot be a negative amount | IF Departmental Cost on the Service Confirmation Item is less than 0, THEN the Service Confirmation Item will fail validation. |

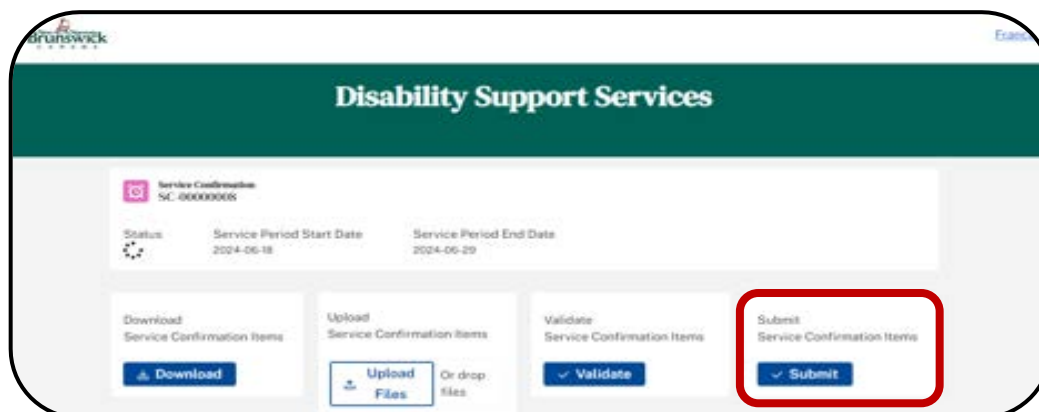
Submitting Service Confirmations

Before officially submitting a Service Confirmation, you will have the following options:

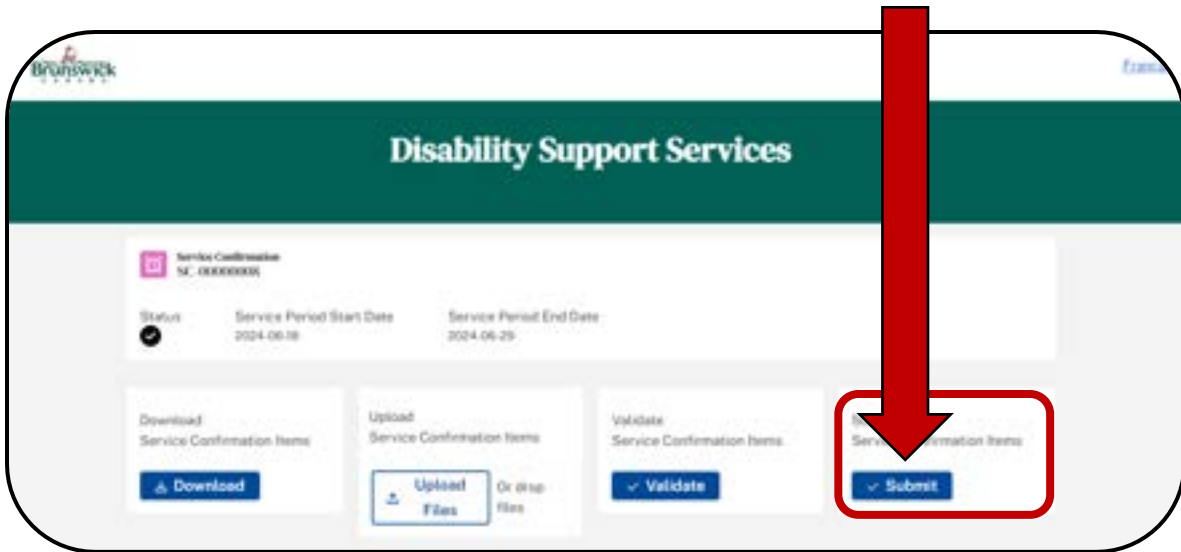
1. If all items passed the validation step, you can submit the Service Confirmation.
2. If there are any failed validation items, you can:
 - a) Make changes immediately, repeat the validation process, then submit validated service confirmations.
 - b) Make changes later once the issue has been resolved (e.g., wrong unit amount entered). Repeat the service confirmation process, however, this time you will not select all, but **select only the service confirmations** that did not validate from a previous confirmation submission. You must repeat reporting and validation steps prior to submission., or
 - c) If an item failed validation due to discrepancies in service (e.g., unit amounts), you can [Log a Change Request](#). If the SD worker needs to make a change, a new Service Request will be issued, approved and activated. If a new service request is issued, the original service will no longer be active.
3. Submit and include any outstanding items in the next Service Confirmation batch.

How to Submit Service Confirmations

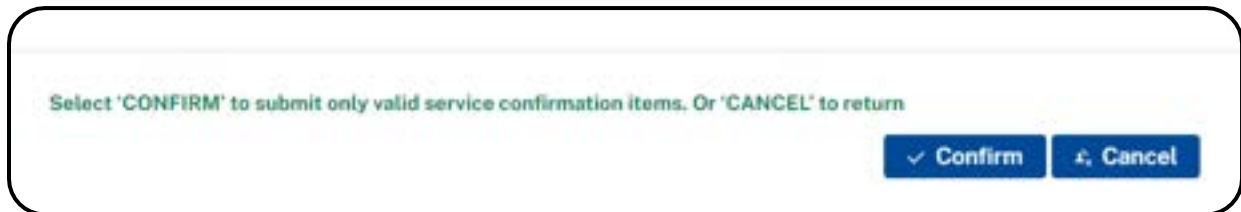
When you are ready to submit a Service Confirmation ensure that you have properly uploaded a CSV or manually input Service Confirmation Items, that the items have been validated and corrections (if applicable) made. **If corrections are unable to be made, you will still be able to submit the Service Confirmation and include any outstanding items in the next Service Confirmation batch.**



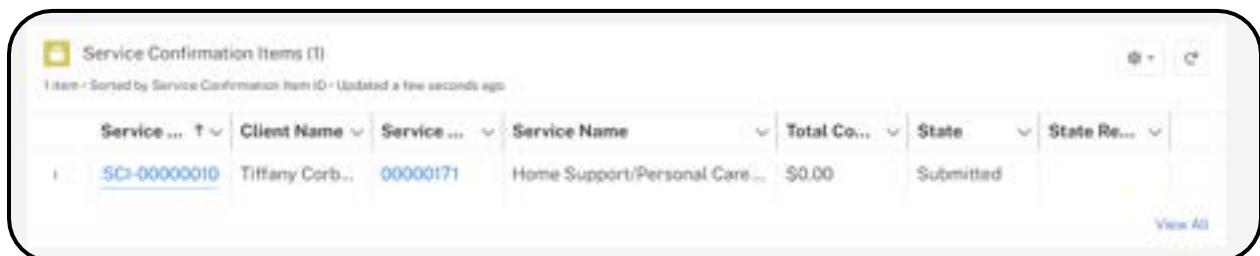
1. On the Service Confirmation, select the **Submit** button.



2. Regardless of whether all Service Confirmation Items have been validated, you will be asked to **Confirm** that *only* valid Service Confirmation Items will be submitted. **Select Confirm.**



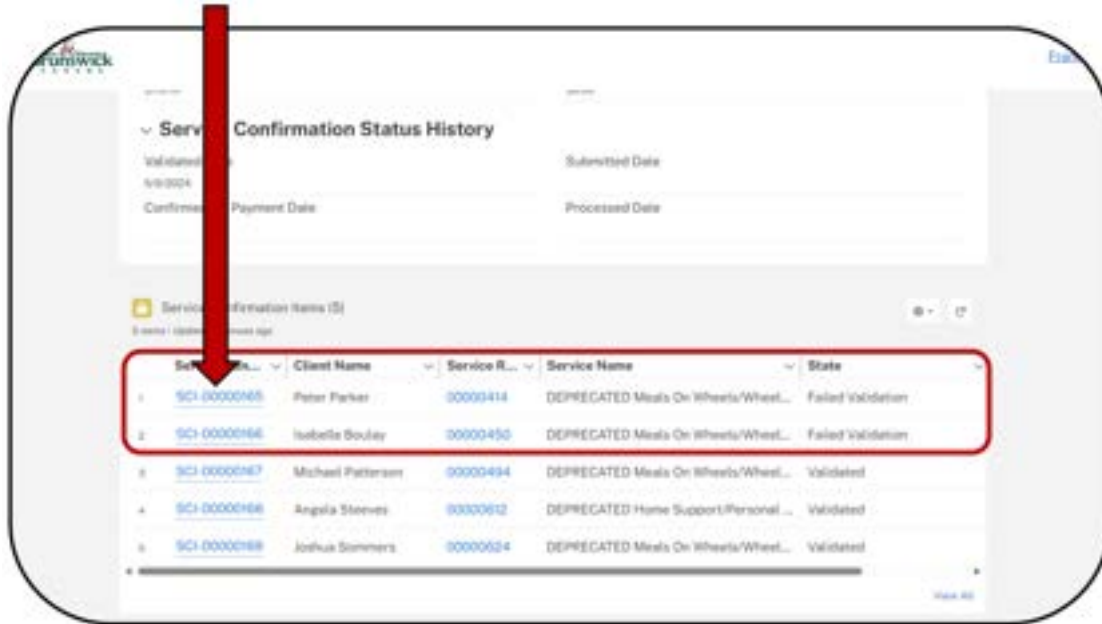
3. The window will refresh, and the **State** of the Service Confirmation Items now say **Submitted**.



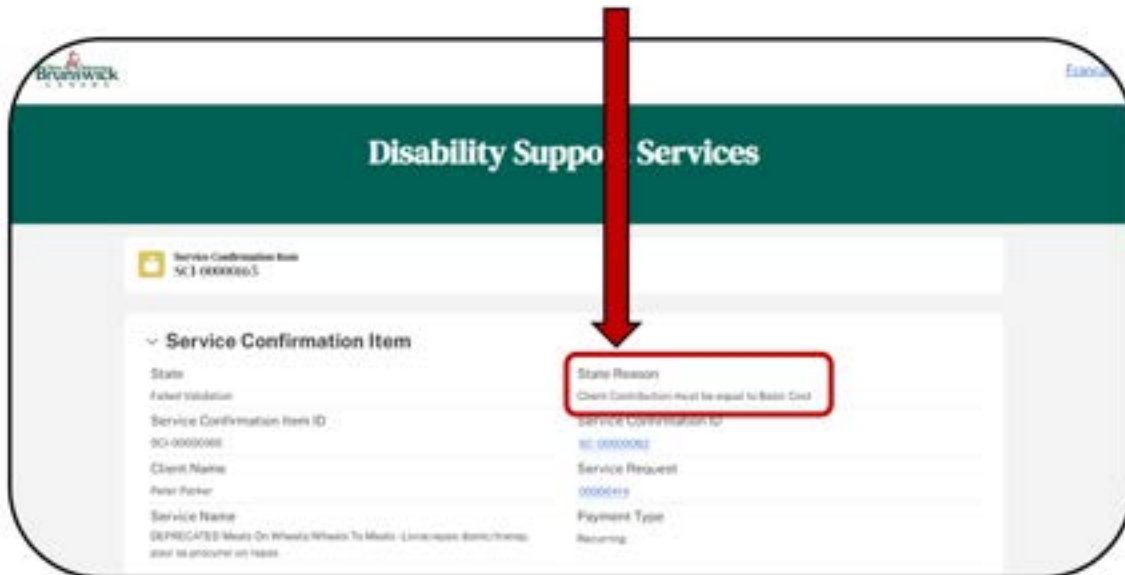
Correcting & Resubmitting Failed Validation Items

When an Item has failed validation, it will need to be resolved (if possible) before validating and resubmitting the Service Confirmation.

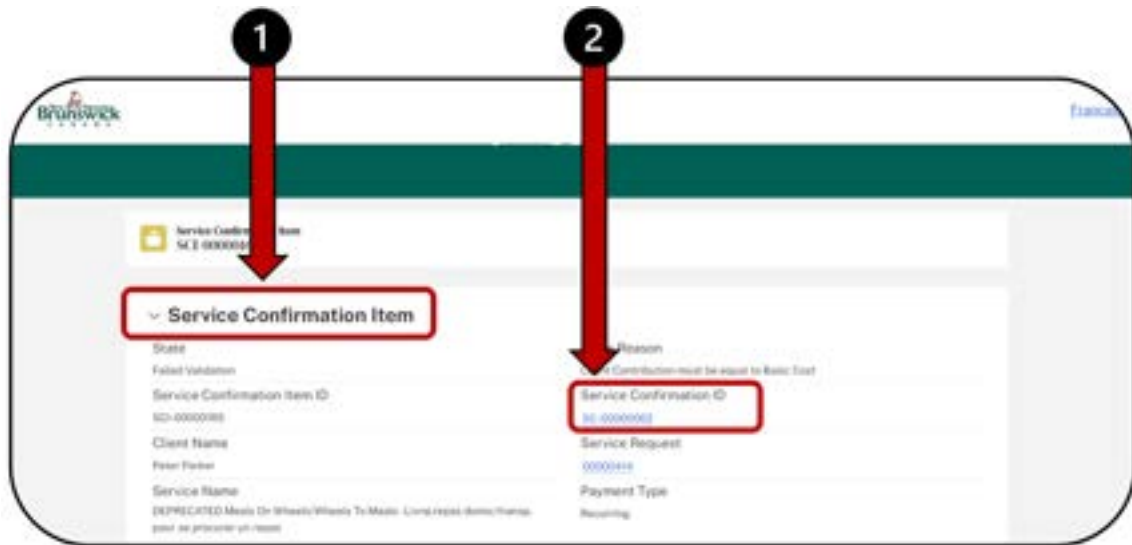
1. **Locate** and **Open** the Failed Validation Item(s).



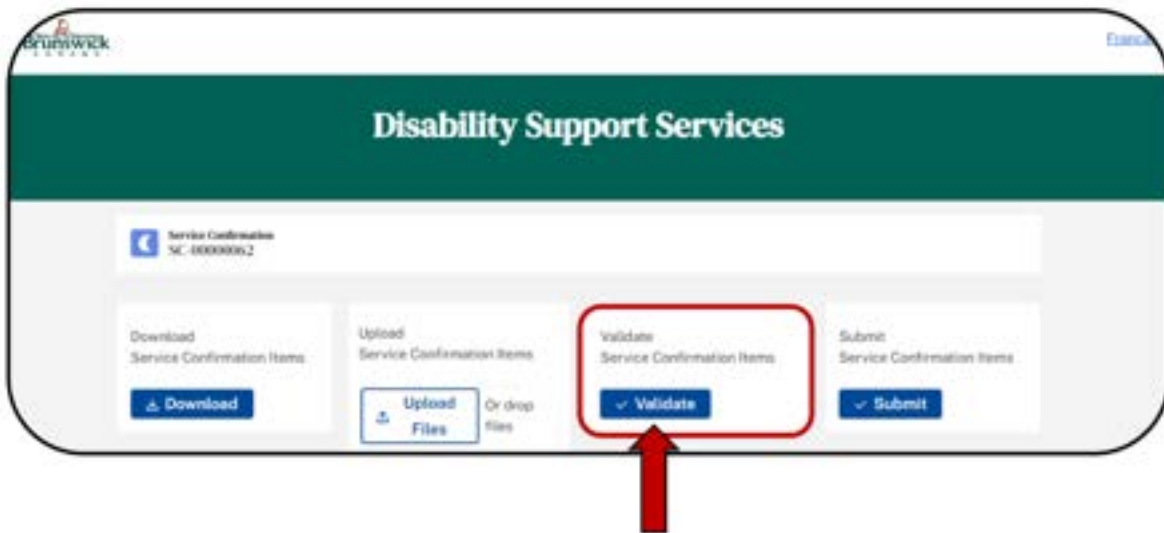
2. **Locate** the **State Reason** for the failed validation. This will help you to identify and resolve the failed validation accordingly.



3. **Make the correction(s)** (re: [Errors & Failed Validations](#) list above and [Capture/Modify Service Confirmation Items](#) for more information on how to appropriately resolve and make corrections to items).
4. Once the correction has been made, locate the Service Confirmation Item header and click on the **Service Confirmation ID** hyperlink. This will bring you back to the Service Confirmation List where you can validate again.



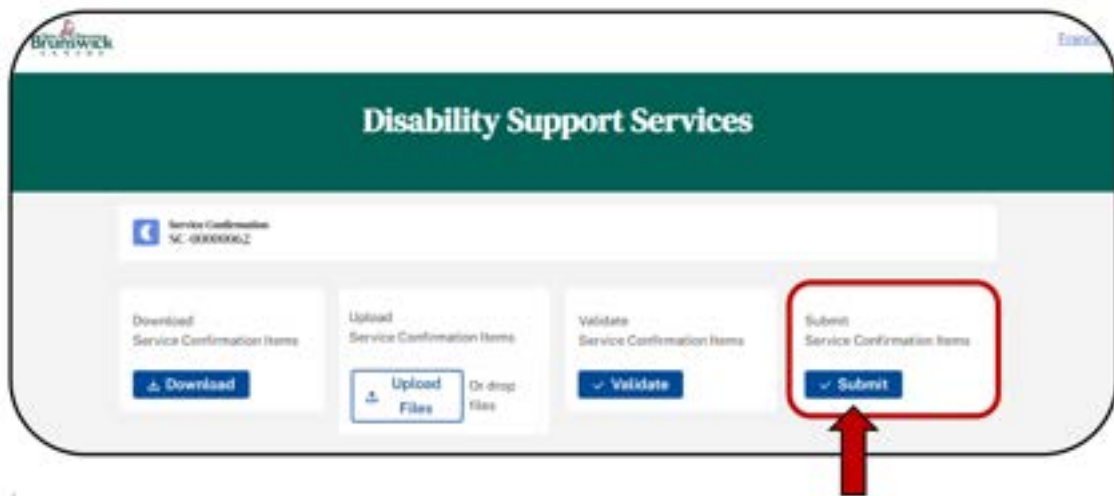
5. Select the **Validate** button to verify any corrections made.



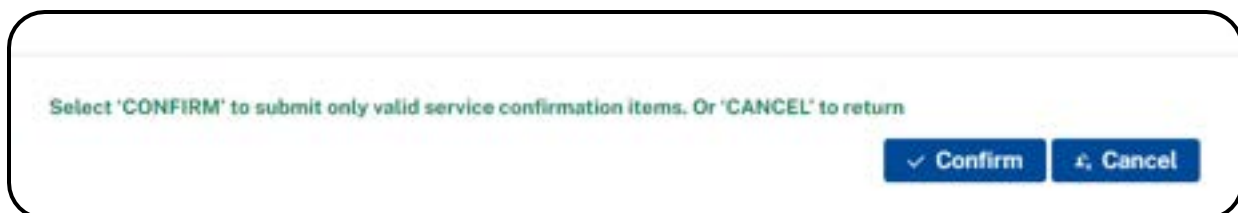
- Verify that the Service Confirmation Items have been validated by scrolling down and checking the Items List.

| Service Con... | Client Name | Service R... | Service Name | State |
|----------------|-------------------|--------------|--------------------------------------|-----------|
| 1 SCI-00000165 | Peter Parker | 00000414 | DEPRECATED Meals On Wheels/Wheel... | Validated |
| 2 SCI-00000166 | Isabelle Boulay | 00000450 | DEPRECATED Meals On Wheels/Wheel... | Validated |
| 3 SCI-00000167 | Michael Patterson | 00000494 | DEPRECATED Meals On Wheels/Wheel... | Validated |
| 4 SCI-00000168 | Angela Steeves | 00000612 | DEPRECATED Home Support/Personal ... | Validated |
| 5 SCI-00000169 | Joshua Sommers | 00000624 | DEPRECATED Meals On Wheels/Wheel... | Validated |

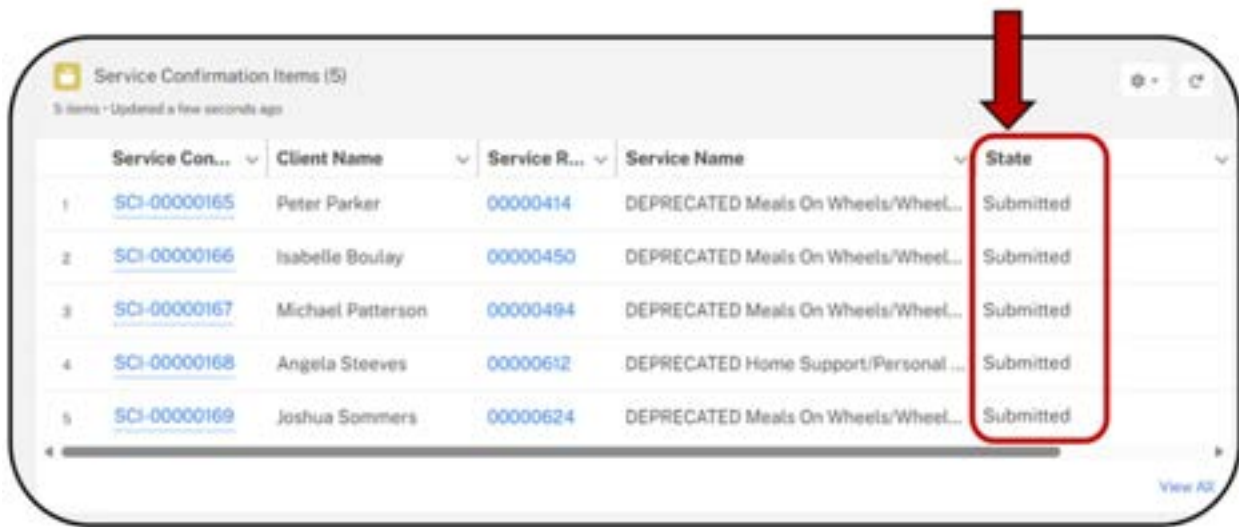
- Return to the top of the page and **Select** the **Submit** button.



- Select Confirm.**



9. The window will refresh, and the **State** of the Service Confirmation Items now say **Submitted**.

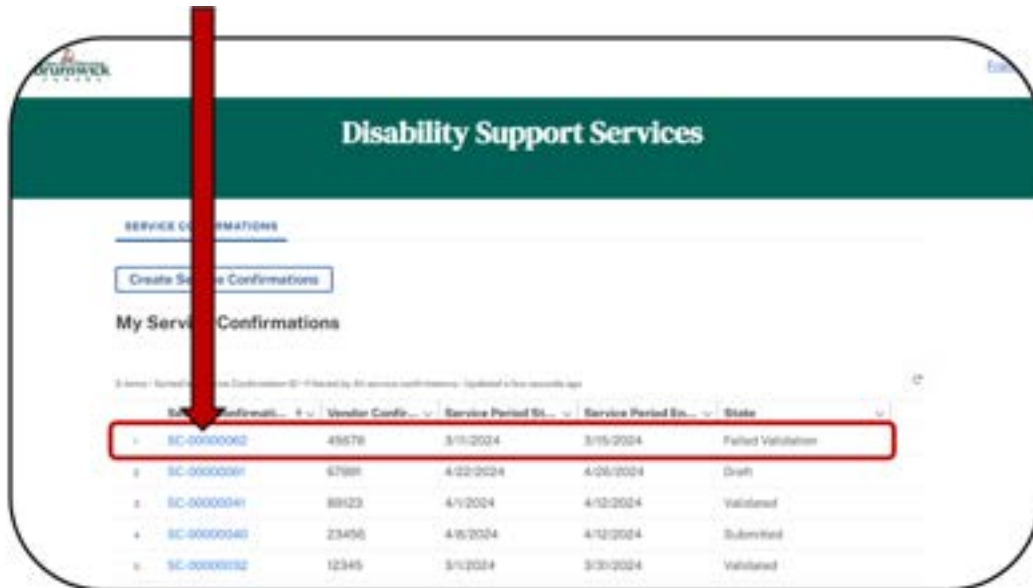


| | Service Con... | Client Name | Service R... | Service Name | State |
|---|------------------------------|-------------------|--------------|--------------------------------------|-----------|
| 1 | SCI-00000165 | Peter Parker | 00000414 | DEPRECATED Meals On Wheels/Wheel... | Submitted |
| 2 | SCI-00000166 | Isabelle Boulay | 00000450 | DEPRECATED Meals On Wheels/Wheel... | Submitted |
| 3 | SCI-00000167 | Michael Patterson | 00000494 | DEPRECATED Meals On Wheels/Wheel... | Submitted |
| 4 | SCI-00000168 | Angela Steeves | 00000612 | DEPRECATED Home Support/Personal ... | Submitted |
| 5 | SCI-00000169 | Joshua Sommers | 00000624 | DEPRECATED Meals On Wheels/Wheel... | Submitted |

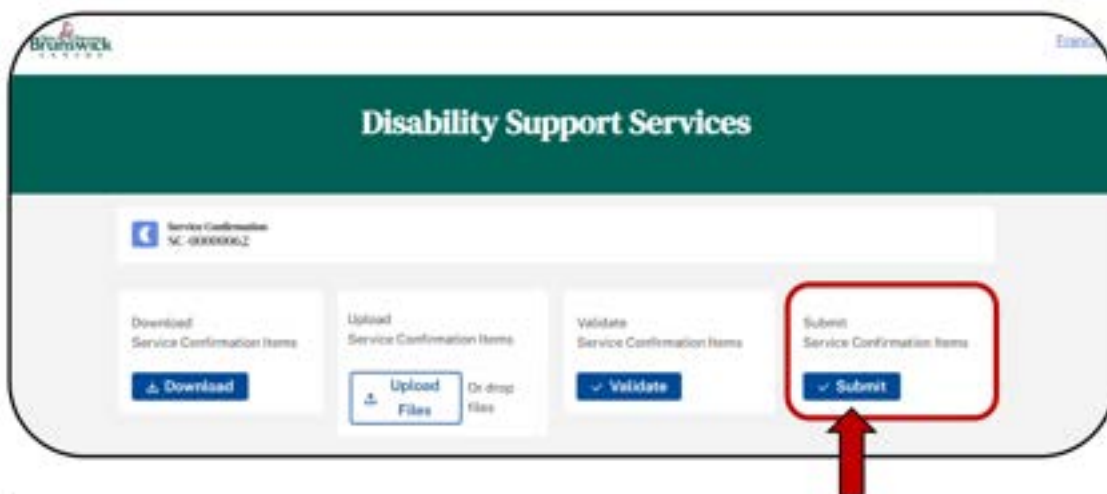
Submitting With Failed Validation Items

In the event that an Item cannot be corrected, you will still be able to submit the Service Confirmation and receive payments for the items that were validated. Include any outstanding item(s) in the next Service Confirmation batch.

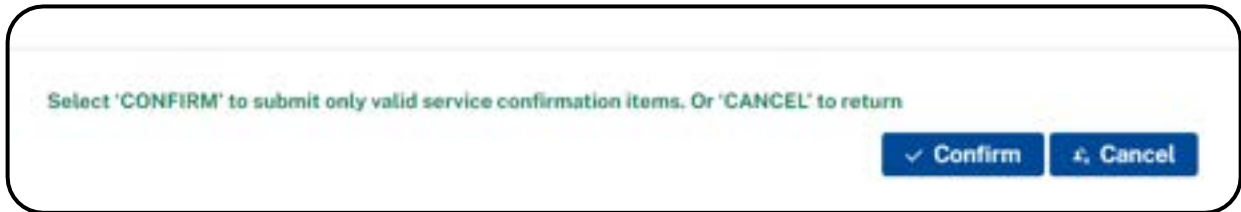
1. **Locate** and **Open** the Service Confirmation with a State of Failed Validation that is ready to be submitted.



2. Once in the **Service Confirmation**, select the **Submit** button.



3. **Select Confirm.** This will tell the system to submit all validated Items.



4. The window will refresh, and the **State** of the Service Confirmation Items now say **Submitted**. Items that failed validation will continue to display a State of **Failed Validation**.

Service Confirmation Status History

Validated Date: 1/18/2024 Submitted Date: 1/18/2024
Confirmed for Payment Date: Processed Date:

Service Confirmation Items (5)

| Service Con... | Client Name | Service R... | Service Name | State |
|----------------|-------------------|--------------|-------------------------------------|-------------------|
| 1. SC-0000185 | Peter Parker | 0000414 | DEPRECATED Meals On Wheels/Wheel... | Submitted |
| 2. SC-0000186 | Isabelle Boulay | 0000430 | DEPRECATED Meals On Wheels/Wheel... | Failed Validation |
| 3. SC-0000187 | Michael Patterson | 0000426 | DEPRECATED Meals On Wheels/Wheel... | Submitted |
| 4. SC-0000188 | Angela Steeves | 0000492 | DEPRECATED Home Support/Personal... | Submitted |
| 5. SC-0000189 | Joshua Summers | 0000624 | DEPRECATED Meals On Wheels/Wheel... | Submitted |

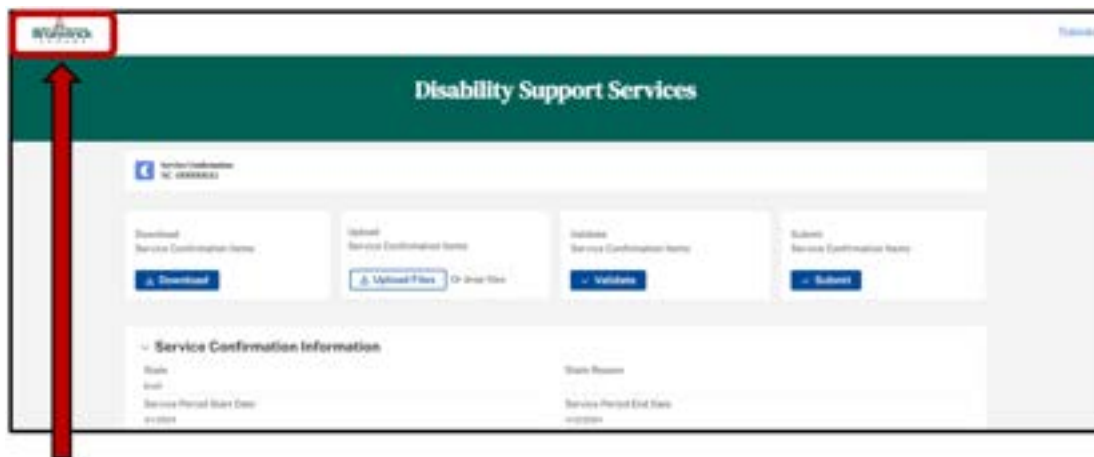
Log a Change Request

If you need to contact the SD worker to address a discrepancy, it is easiest to do so from within the system. If the service requisition needs to change, for example, you agreed to an increase in hours, but the service request does not reflect this change, you will need to contact SD. Once resolved, you will go back to the original service request and 'log a change request'

Note: These changes are done before sending for payment, and thus much easier to resolve.

Navigate to Service Request

1. If on the Service Confirmation window, select the **New Brunswick** icon in the top left corner to navigate back to the Homepage.



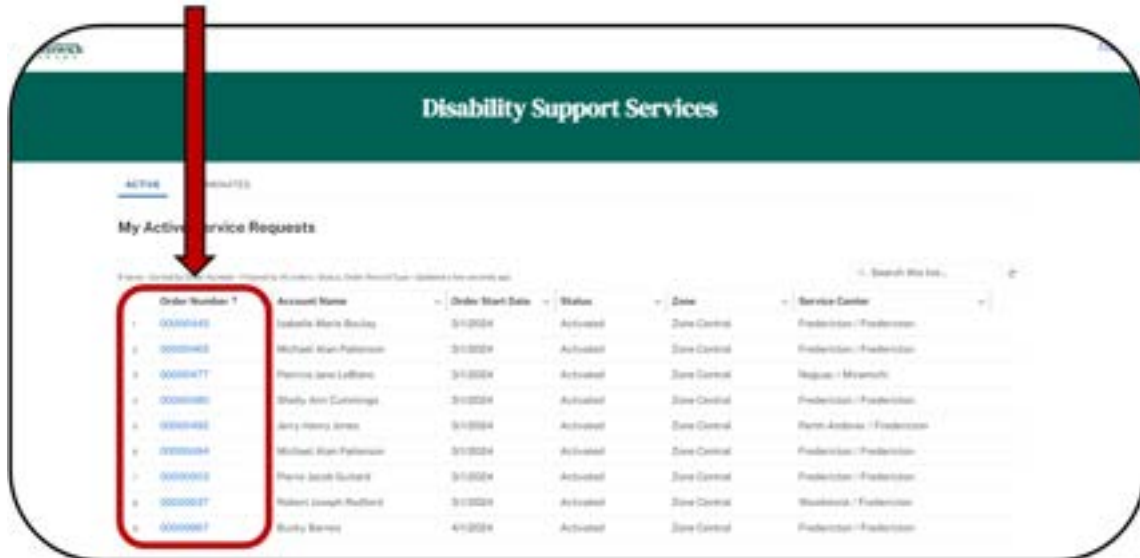
2. From the homepage, select the **Service Requests** tab.



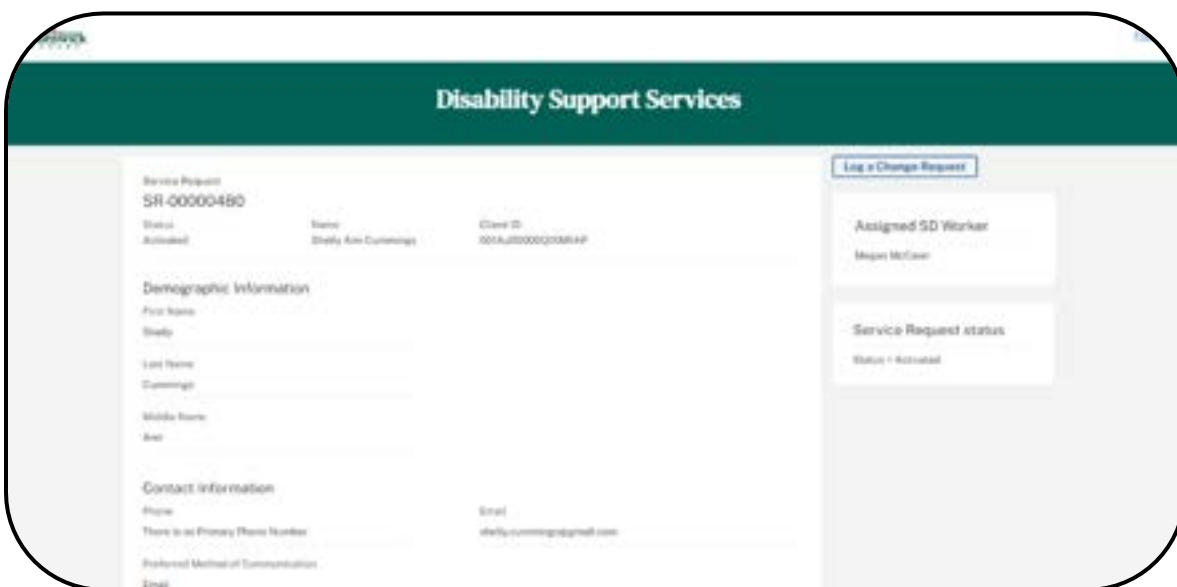
3. The Service Request **Active** window tab is displayed.

Open and View Active Service Request

1. From the **Active** tab, select the applicable **Service Request Hyperlink** from the provided list.



2. The **Service Request** information is displayed (i.e., Bio. Demo. Information, Zone, Service Request Details, Emergency Contacts, Assigned SD Worker and the ability to Log a Change Request).



Log a Change Request (Categories)

1. Open the applicable **Service Request**.
2. Select the **Log a Change Request** pushbutton.



3. The Change Request Details pop-up window is displayed.



4. The Available types and mandatory fields that populate will differ based on the chosen Category in the dropdown menu (re: Adjust Service, Pause Service, End Service).

Adjust Service

Category ⊕
Adjust Service

Type ⊕

Available

| Available | Chosen |
|------------------------------------|--------|
| Person Requesting Decrease Service | |
| Agency Requesting Decrease Service | |
| Person Requesting Increase Service | |

Description ⊕

Date ⊕
Date Time

[Next](#)

Pause Service

Category ⊕
Pause Service

Type ⊕

Available

| Available | Chosen |
|---------------------------------|--------|
| Person Requesting Pause Service | |
| Agency Requesting Pause Service | |

Description ⊕

Date ⊕
Date Time

[Next](#)

End Service

Category ⊕
End Service

Type ⊕

Available

| Available | Chosen |
|-------------------------------|--------|
| Person Requesting End Service | |
| Agency Requesting End Service | |

Description ⊕

Date ⊕
Date Time

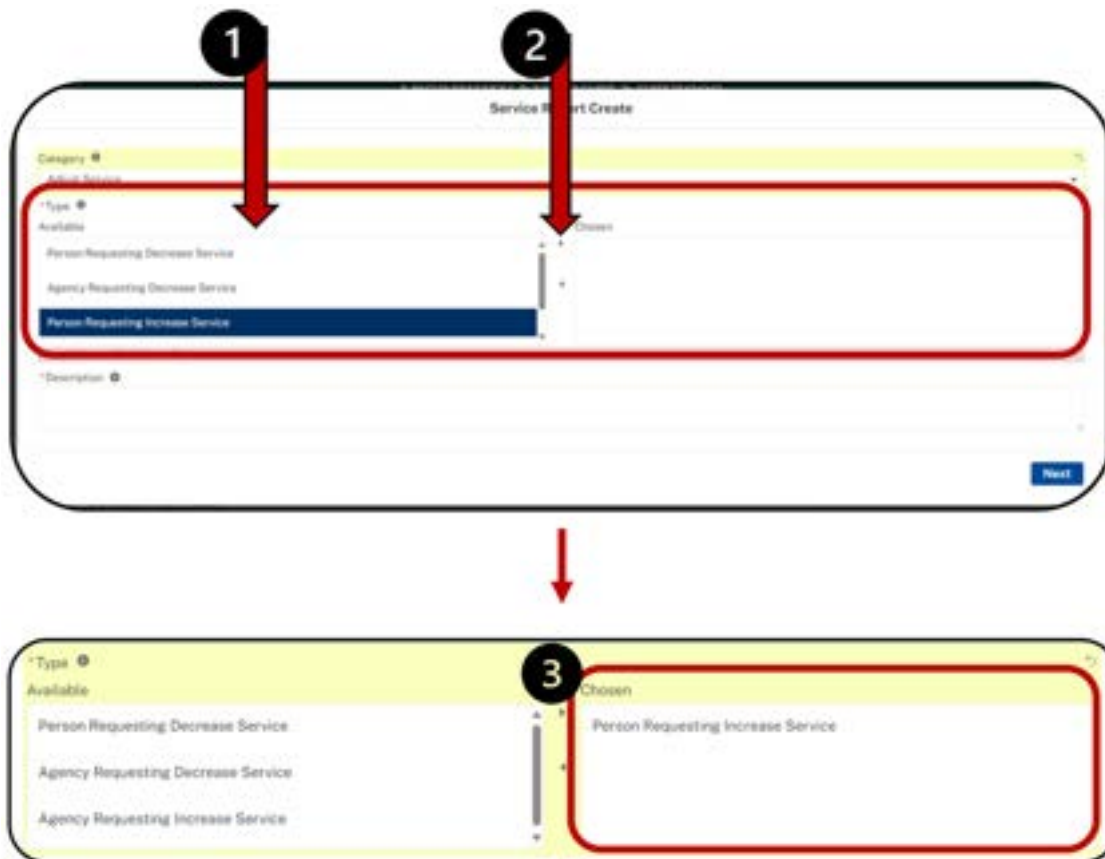
[Next](#)

Log a Change Request (Adjust Service)

1. Select **Adjust Service** from the Category dropdown menu.



2. Select the **Change Request Type** (e.g., Person Requesting Increase Service) and move it into the **Chosen** pick-list field.



3. Provide a detailed description of the **Change Request**.

The screenshot shows the 'Service Report Create' form. A red arrow points to the 'Description' field, which is highlighted with a red border. The form includes fields for 'Category', 'Adjust Service', 'Type', 'Availability', and 'Chosen'. The 'Description' field contains the text: 'Please describe the changes in detail and the reason for the change request.' A 'Next' button is visible at the bottom right of the form.

4. Click the **Next** pushbutton.

5. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

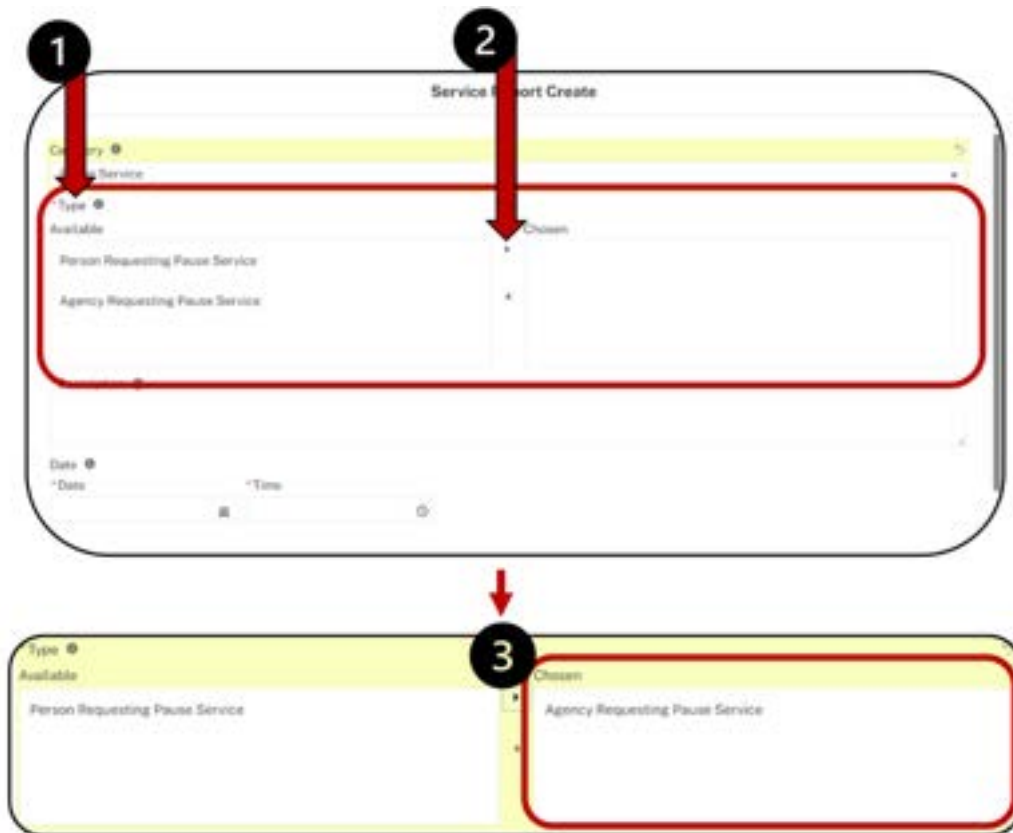
The screenshot shows the 'Service Report Create' confirmation message. The message reads: 'Thank you, the change request occurring at 2024-04-24, 9:56 a.m. related to Isabelle Boulay has been recorded.' A 'Finish' button is visible at the bottom right of the message.

Log a Change Request (Pause Service)

1. Select **Pause Service** from the Category dropdown menu.



2. Select the **Pause Request Type** and move it into the **Chosen** pick-list field.



3. Provide a detailed description of the **Pause Request**.

4. Input the date (and time, if applicable) when the change of service needs to be in place (i.e., start date of the pause in service). Click the **Next** pushbutton.

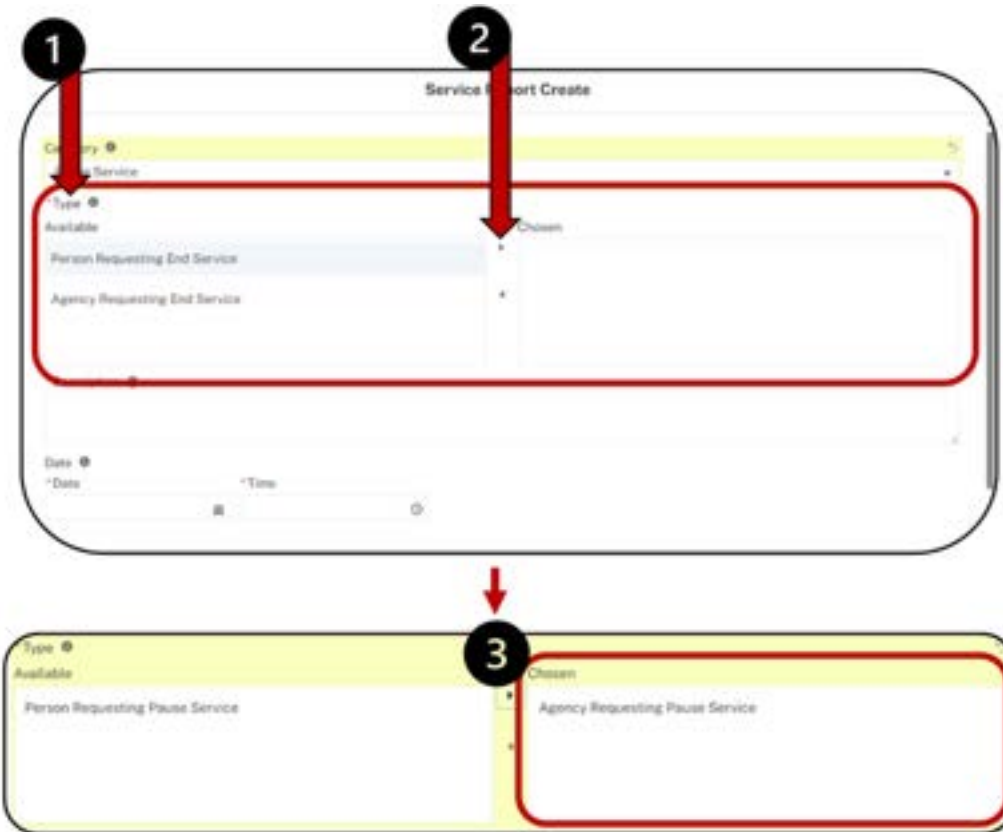
5. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

Log a Change Request (End Service)

1. Select **End Service** from the Category dropdown menu.



Select the **End Request Type** and move it into the **Chosen** pick-list field

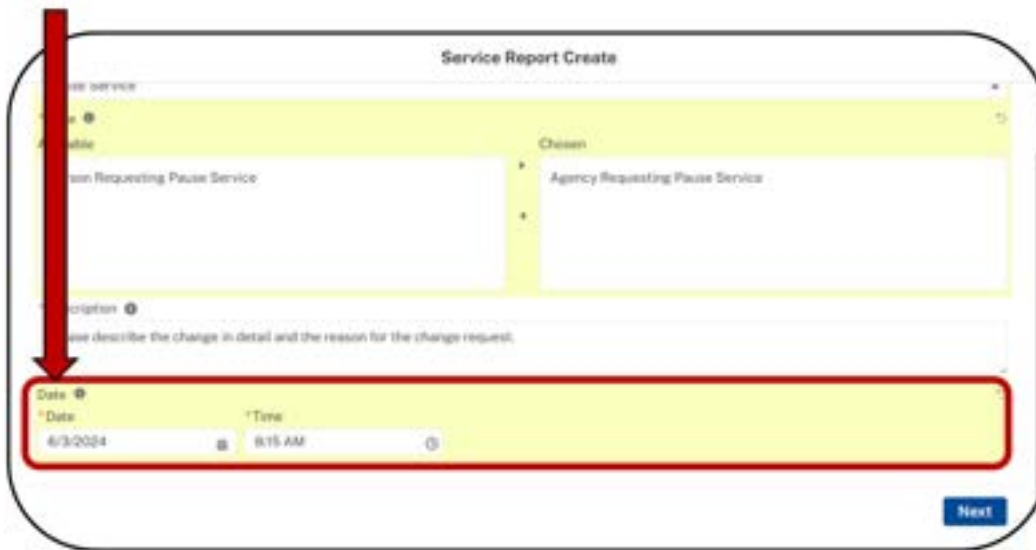


6. Provide a detailed description of the **End Request**.



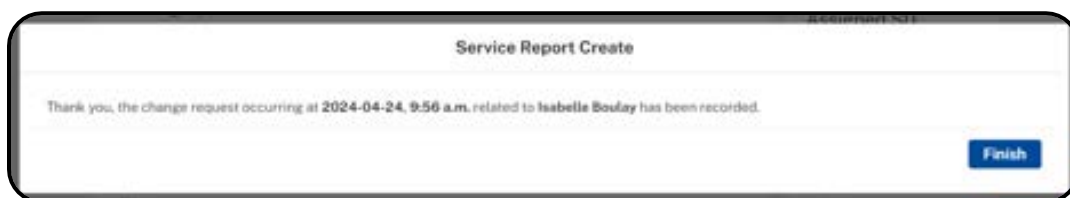
The screenshot shows the 'Service Report Create' form. The 'Description' field is highlighted with a red box and a red arrow pointing to it. The field contains the text: 'Please describe the change in detail and the reason for the change request'. Below the description field are fields for 'Date' and 'Time'. A 'Next' button is located at the bottom right of the form.

7. Input the date (and time, if applicable) when the change of service needs to be in place (i.e., start date of the pause in service). Click the **Next** pushbutton.



The screenshot shows the 'Service Report Create' form. The 'Date' and 'Time' fields are highlighted with a red box and a red arrow pointing to them. The 'Date' field contains '6/3/2024' and the 'Time' field contains '8:15 AM'. A 'Next' button is located at the bottom right of the form.

8. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.



The screenshot shows a confirmation message in the 'Service Report Create' form. The message reads: 'Thank you, the change request occurring at 2024-04-24, 9:56 a.m. related to Isabelle Boulay has been recorded.' A 'Finish' button is located at the bottom right of the form.

Conclusion

By completing this module, you have covered:

- What is Finance
- Navigating Service Confirmations
- Download Service Confirmation Items
- Upload Service Confirmation Items Spreadsheet
- Validate Service Confirmation Items
- Submit Service Confirmations (With & Without Failed Validated Items)
- Modify Service Confirmation Item Information
- Failed Validations - Correcting and Resubmitting
- Errors & Failed Validations
- Accessing Service Requests
- Logging Change Requests (Changes in Service)