Finances & CommunityCareNB

SERVICE PROVIDERS

Community Care
Soins Communautaires NB

| USER GUIDE |

Version 0.2

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CONFIDENTIAL STATEMENT

Welcome to CommunityCareNB

CommunityCareNB is a digital platform for Service Providers to communicate with the Department of Social Development about services. We are building CommunityCareNB to make it easier to communicate with Social Development about services and to reduce errors and delays. To begin, CommunityCareNB is being used in South-Western NB and for clients with disabilities. CommunityCare will be expanded to include all Social Development clients and services over the next few years.

In CommunityCareNB, the primary task for your organization will be to receive and respond to requests for services (called order summaries) and to confirm services for payment. This guide provides instructions to submit confirmations for payment.

CommunityCareNB has additional features that you may not need or use. Your organization may use CommunityCareNB to:

- Communicate with SD about changes to services.
- View Active and historical order information.
- View information using a Dashboard.

Instructions on how to use each of these features is presented below. To learn more about CommunityCareNB (what you need, notifications and basic navigation), refer to the Appendix at the end of the guide for more information

New Terminology & Statuses

New Terminology / Order Statuses	Also Known As / Definition
Order Summary	A summary of service request / requisition, including all changes or amendments made the original service.
Order	Individual Service Request / Service Requisition all found under the Order Summary. This can include modifications and amendments made by SD.
Activated Status	This status means that the service has been accepted by the service provider, meaning they can now begin offering services to the client.
Terminated Status	This status means that the services have ended. Logging a request can still made for direct communication with the SD Worker and the service provider is still able to invoice for services rendered.
Offered Status	This status means that Social Development has requested services, and the order requires the service provider to review and accept or decline. Please note, not all services require service providers to accept or decline and your organization may not see this status.
Pending Status	This status means that a worker at Social Development is adjusting a client's service.
Canceled Status	This order summary has been canceled. If an order is cancelled, it is as though it was never offered. This means that you cannot bill for this service.

Service Confirmation (SC)	Previously referred to as an invoice, we are now asking you to confirm services through Service Confirmations. These are all assigned unique numbers by the system and where you manage Service Confirmation Items.
Service Confirmation Item (SCI)	These are the individual client's services that you are confirming services and submitting for payment. These Service Confirmation Items allow you to view additional information and provides easy access to the Order Summary (Service Record) to log change requests (i.e., service report).
Service Report	Overall term used for when a service provider must notify the SD Worker of an Incident or Observed change in the client, requests a change to services or logs a miscellaneous request.

Quick Reference Guide (Step-by-Step)

This section provides high level instructions, for more information and a detailed step-by-step with pictures, click the title (blue-underlined text) to be brought to the location in the document.

Step 1: Log in

1. Go to https://ccnb-scnb.gnb.ca/partnerportal/s/
2. Log in using your username and password.

Step 2: Confirm services for payment (Service Confirmations)

1. You begin the process of submitting services for payment by creating a batch of all services/clients that you will submit within a calendar month.
2. Click Create Service Confirmation button and enter all required information in the popup window, then click next.
3. My Service Request window is displayed. Select all applicable service orders and enter in the service period. Click Next.
    1. If all Service Requests should proceed for payment, select the checkbox next to Service Request Number, otherwise, individually select each applicable order summary.
4. Enter your Vendor Confirmation Number (i.e., *invoice number*). This must be different that one used in VEIS. Click **Next** and a draft Service confirmation has been created.

Submitting Services for Payment (Manual & CSV):

There are two ways to submit services for payment. If you have a small number of services to submit for payment, it is likely easier for you to use the small batch method. If you have many services to submit (for example +20) or if you are a whiz at Excel, or if you prefer the VEIS method, the large batch method might suit your needs.

Step 3A: Submit Small Batch of Services (Manual Entry)

1. From the Service Confirmation Items field (i.e., each service request/order) select the applicable Number.
2. From the Service Confirmation Item detail window, select any Pencil Icon.

3. All editable/modifiable fields are now free to make changes.
4. Enter in all information that is required by scrolling down (e.g., how many hours provided under units, kilometres, stat. holidays, etc.) and **click Save**.

Submit for Large Batch of Services (CSV)

Step 3B: Download Service Confirmation Items & Provide Required Information

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.
3. The file opens with the Service Conformation Item ID, Product Name, Service Request ID, Client Name, Unit Type, and Rate already filled in.
4. Enter the **No. of Units** (e.g., hours of service provided, transportation cost, etc.) and then Save the file to your computer. Once saved, the document is ready to be uploaded to CommunityCareNB.

Step 3B: Upload Service Confirmation Items (CSV)

1. From the Service Confirmation page, select the **Upload** button.
2. **Locate** the Service Confirmation Items file and select **"Open"** to begin the upload process. Alternatively, you can drag and drop the file in the upload box.
3. Wait for the **Green Checkmark,** click Done and a confirmation message appears.

Step 4: Validate Services Provided

This step alerts you to any issues with payments.

1. On the Service Confirmation, click the **Validate** pushbutton.
2. 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.

Step 5: Failed Validation

1. From the Service Confirmation Items list, select the **Failed Validation SC item number** (hyperlink/blue text).
2. Locate the **State** and **State Reason**. Re: Errors & Failed Validation List below to learn how to fix/correct a failed validation.

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

Step 6A: Correcting & Resubmitting Services that Failed Validation

This step isn't always required. CommunityCareNB will notify you if an item you are submitting for payment has failed validation as well as how to resolve the issue.

1. Open the Failed Validation Item(s) on the Service Confirmation. Read the **State Reason** for the failed validation; this will help you to identify and resolve the issue.
2. Make the **correction(s)** (re: Errors & Failed Validations more information on how to appropriately resolve and make corrections to items).
3. Once corrections are made on the Service Confirmation Item, return to the Service Confirmation and validate again.
4. Verify that all items are now validated and return to the top of the page to select the **Submit** button. The window will refresh, and the State of the Service Confirmation Items now say Submitted.

NOTE: If you have services that have failed validation (for example, you have to follow up with Social Development due to a discrepancy), you can submit successful services and re-submit confirmation that failed validation at a later time.

Step 6B: Submit Service Confirmations for Payment

1. From the Service Confirmation, select the **Submit** button. 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**.
2. The window will refresh and verify that the **State** of the Service Confirmation Items now say **Submitted**.

Step 6C: Submitting Services that Failed Validation

If corrections to service confirmation items that have failed validation cannot be made, you are still able to submit for the remaining items while you await any necessary corrections by Social Development. Failed Validation items will not be processed for payment and can be confirmed once corrections are made to the applicable order.

1. From the Service Confirmation (*invoice*) with the Failed Validation status, select the **Submit** button.
2. **Select Confirm**. This will tell the system to submit all validated Items. 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**.

Additional Details, Steps & Images

The following section of the guide provides a more in-depth description of how the system works, detailed steps with images on how to complete actions (e.g., how to add and/or edit tax). Additionally, you will find a list of possible errors or failed validations along with the proper corrections.

Log In

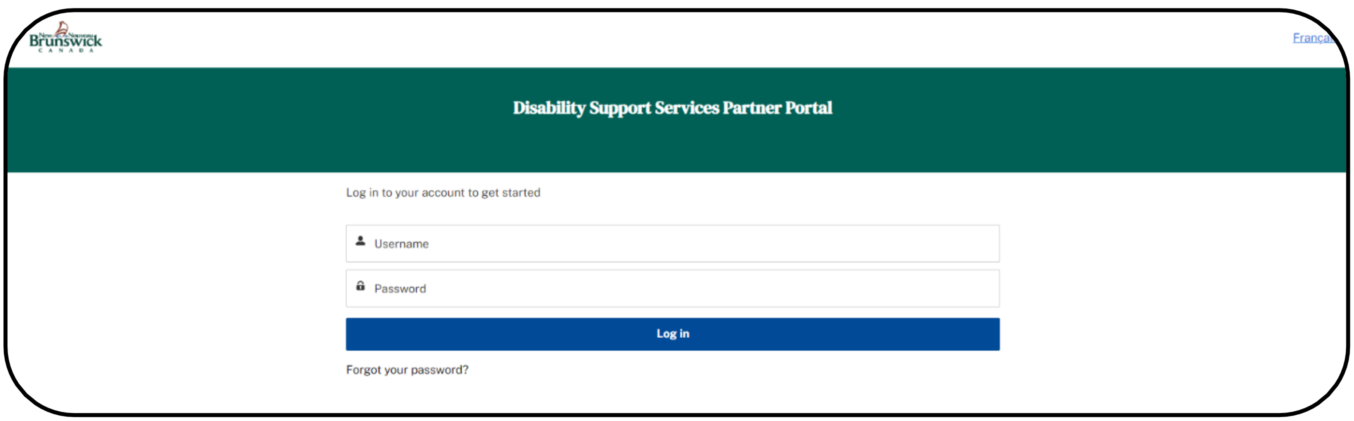
Because CommunityCareNB has personal information, we have a responsibility to protect people's private information. In addition to unique username and password, CommunityCareNB uses a second layer of security, multifactor authentication, to ensure the people logging into the system have authorized access.

IMPORTANT: Salesforce will have sent an email asking you to verify your credentials (i.e., support@salesforce.ca) and to set up a password. Do this before completing the following steps.

1. Go to https://ccnb-scnb.gnb.ca/partnerportal/s/

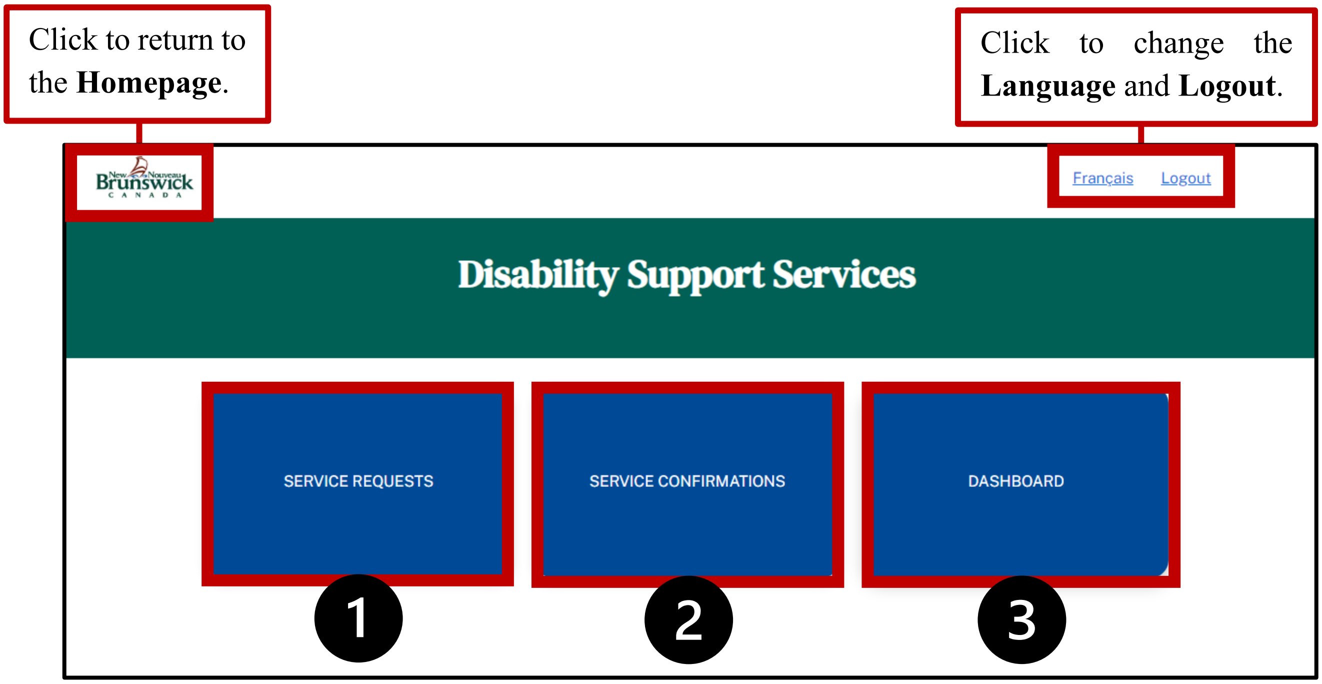
2. Copy the above link in your browser's search bar. Click the **Star** icon to favourite/bookmark the link for quick and easy access.

1. Log in using your username and password.



Homepage

The homepage is where you will land every time you log into CommunityCareNB. This is how you will get around the system to view client information and reports.



1. **Service Request:** Selecting this tab will open a new window containing **Active** and **Terminated** service requests. This area of the portal is where you will access client and service information and log a change request. To protect clients' privacy, not all details of service requests are visible to the financial user type, as this information is not required for payment related tasks.

2. **Service Confirmations:** Selecting this tab will open the service confirmations window, where you will be able to create and access draft, uploaded, validated and submitted service confirmations (i.e., previously referred to as invoices).

3. **Service Request Dashboard:** The **Dashboard** displays reports related to new service requests (last 30 days), expiring service requests (next 30 days), as well as all activated and terminated service request. Reports can be displayed and exported.

Service Confirmations

When services that have been provided by an agency and 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 month (e.g., last week, last month).

b. **Second Step:** Create the file to enter the 'actual' hours/units etc.

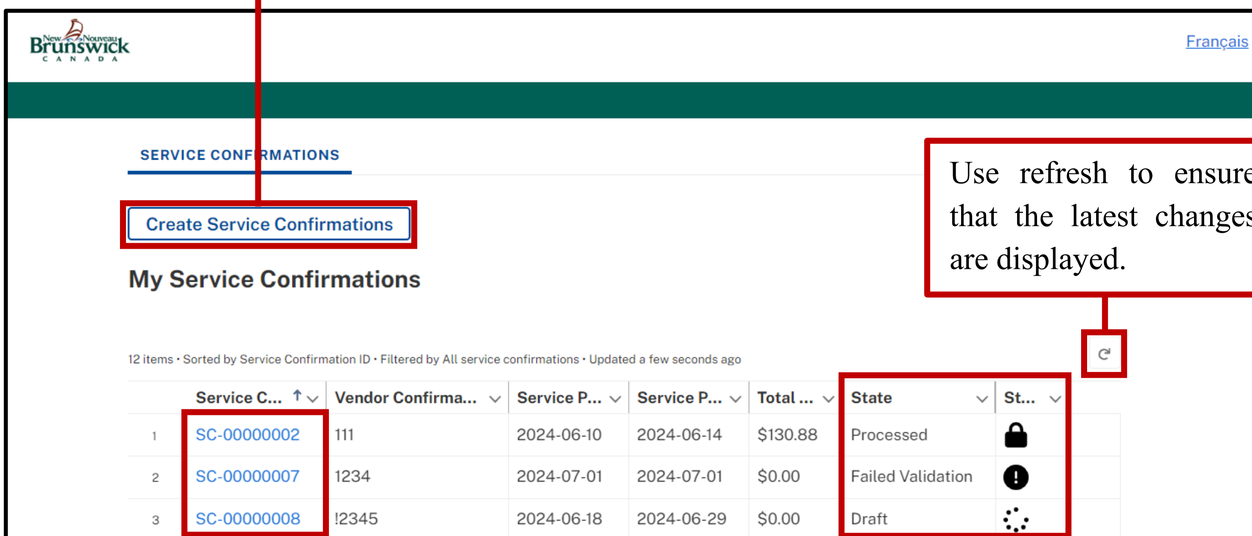
c. **Third Step:** Validate the information (the system will check for errors), and the final step is to submit. Submission will send the file directly to Service NB for payment.

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 order is generated on the order summary. For some services, requires acceptance by the service provider. Changes to an order summary will be shown as specific orders within an order summary. For example, a client is receiving 1 session for Foot Care per month over the course of a year. They now require 2 sessions in June and July. The orders on the order summary will be adjusted by Social Development and automatically activated. Once adjustments are made, the orders for June and July will now show 2 sessions rather than 1.
- **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. The system will alert Social Development to potential fraud.
- Invoice / Vendor Confirmation numbers **must** be unique across all systems (i.e., CommunityCareNB & VEIS/NBFamilies). If the invoice/vendor confirmation number is **not unique**, the service confirmation will be rejected and will have to be submitted with a unique invoice number.

Service Confirmations Page Overview

Select this button to begin creating a new service confirmation.



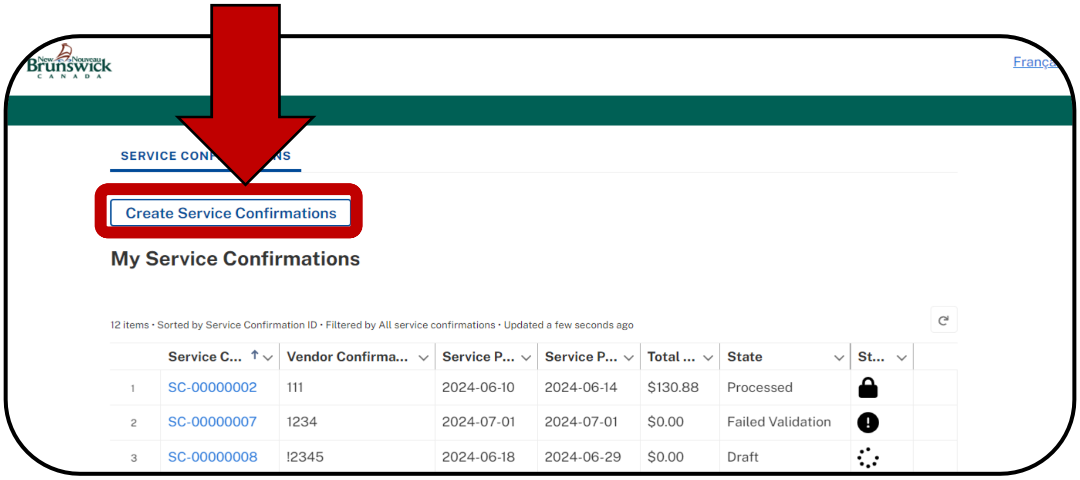
Use refresh to ensure that the latest changes are displayed.

Select a hyperlink to open and view Service Confirmation details.

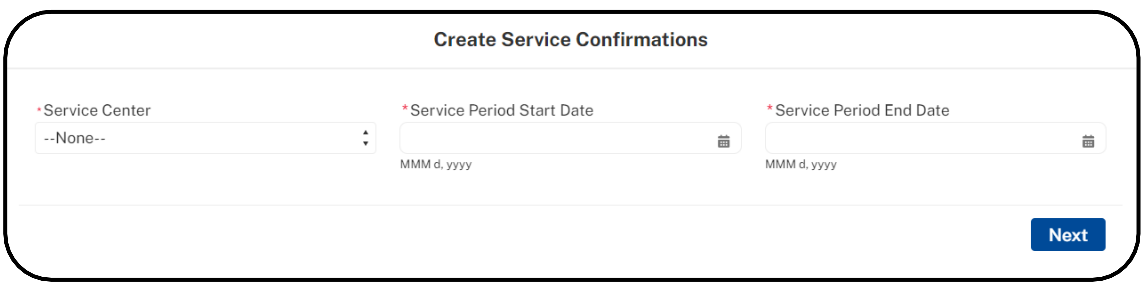
These columns display the state and status (*icons*) of a Service Confirmation.

How to Create Service Confirmations

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:

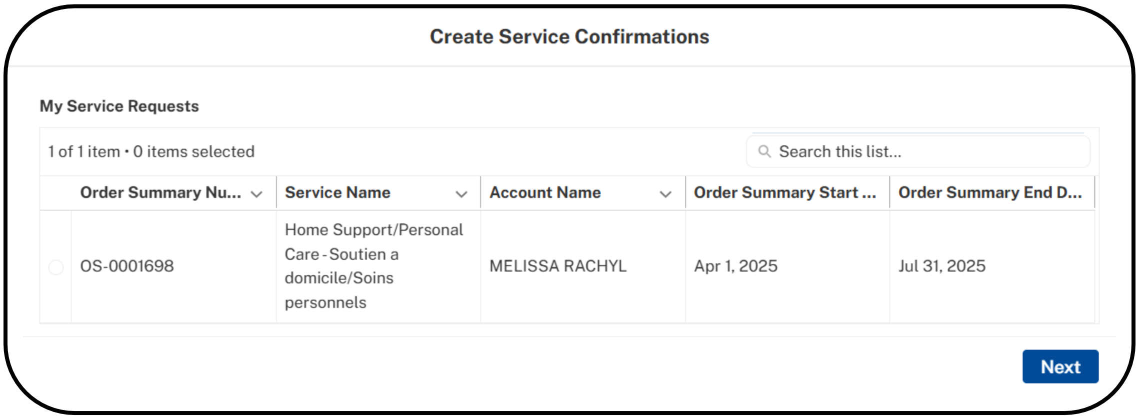
a) Service End Date is in the future.

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.

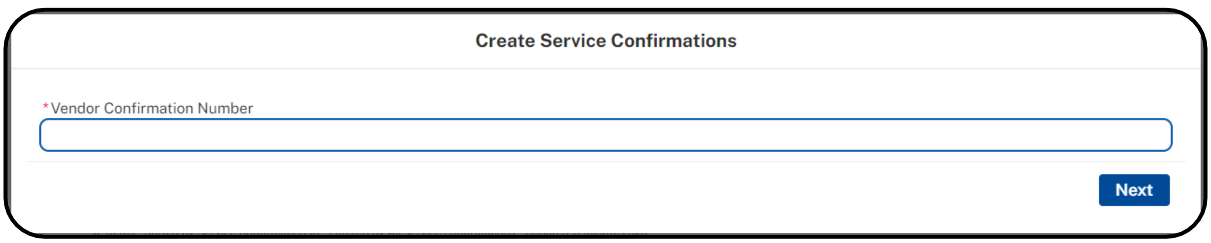
5. Once completed, click the **Next** pushbutton.

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.

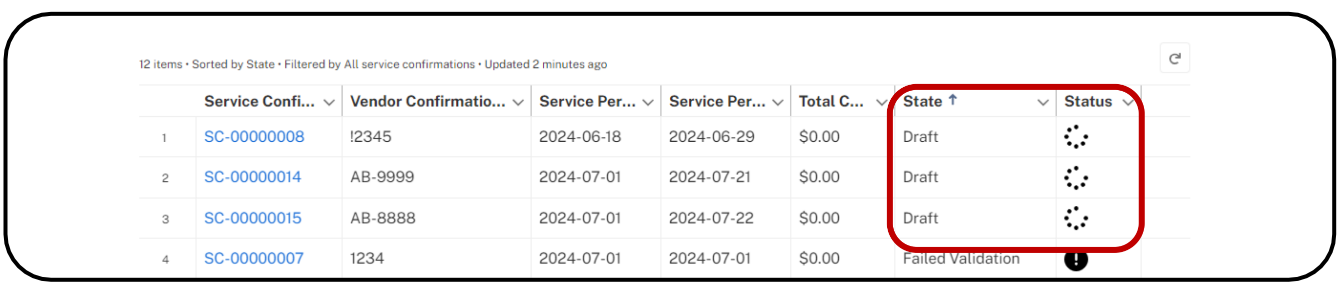


7. Enter your **Vendor Confirmation Number** (i.e., *invoice number*). Click **Next**.

IMPORTANT: Invoice numbers must be unique across all systems (i.e., CommunityCareNB & VEIS/NBFamilies). If the invoice/vendor confirmation number is **not unique**, the service confirmation will be rejected and will have to be submitted with a unique invoice number.



8. The **Created Service Confirmation** is displayed. **State and Status in *draft*.**



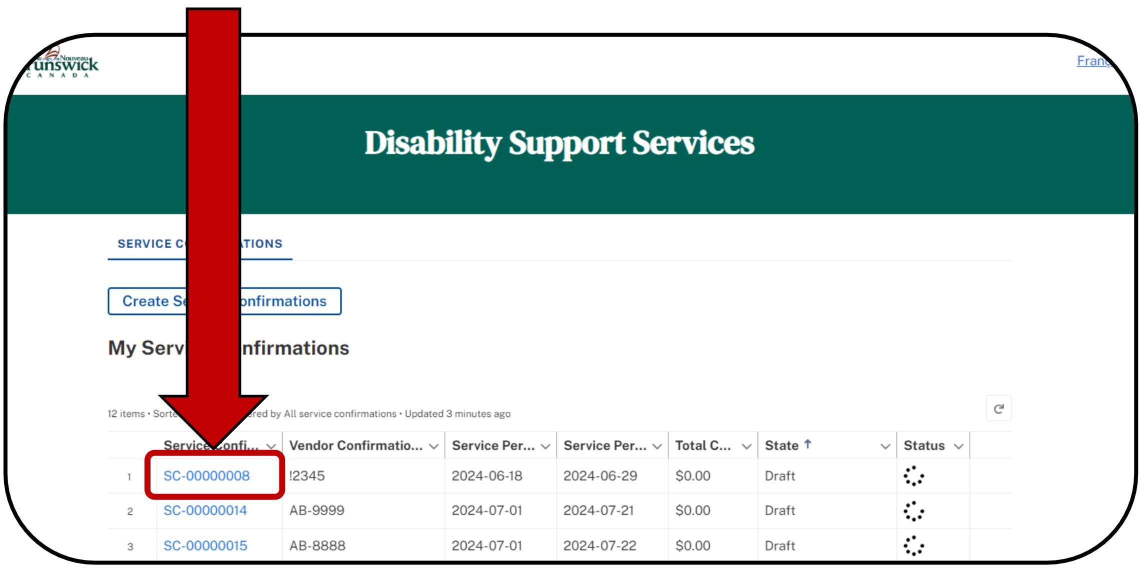
NOTE: You will receive an error message if:

a) **The same Vendor Confirmation Number is used for another Service Confirmation in CommunityCareNB. The system will not notify you if it has been used in NBFamilies/VEIS – please ensure it is unique to both systems (not the same).**

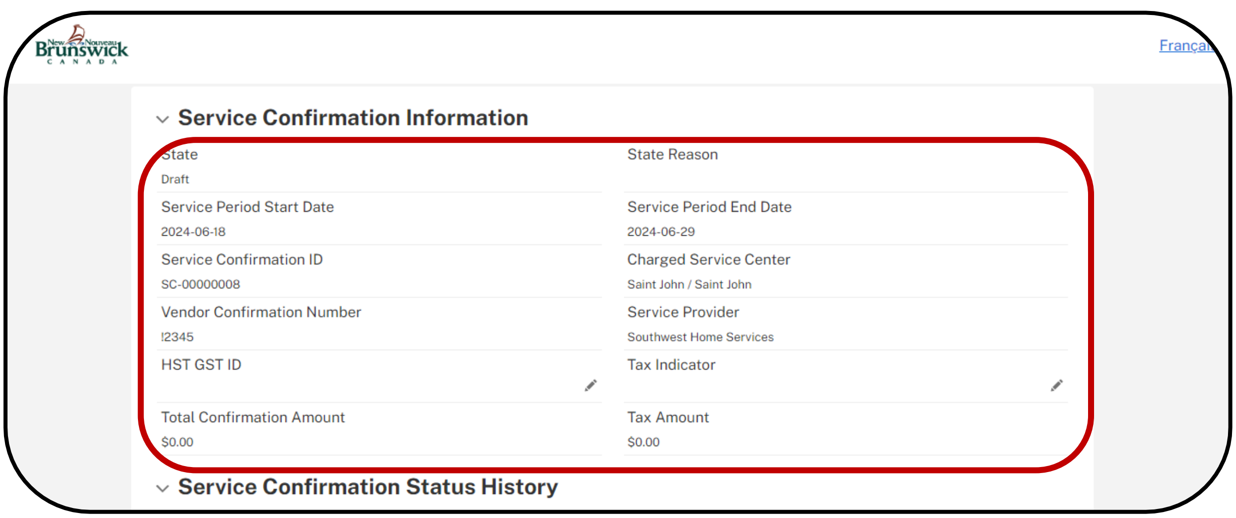
How to Add/Edit Tax & HST GST ID

Tax Indicator and HST GST ID will be required prior to submitting any Service Confirmation – the **Tax Indicator is a mandatory field.**

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

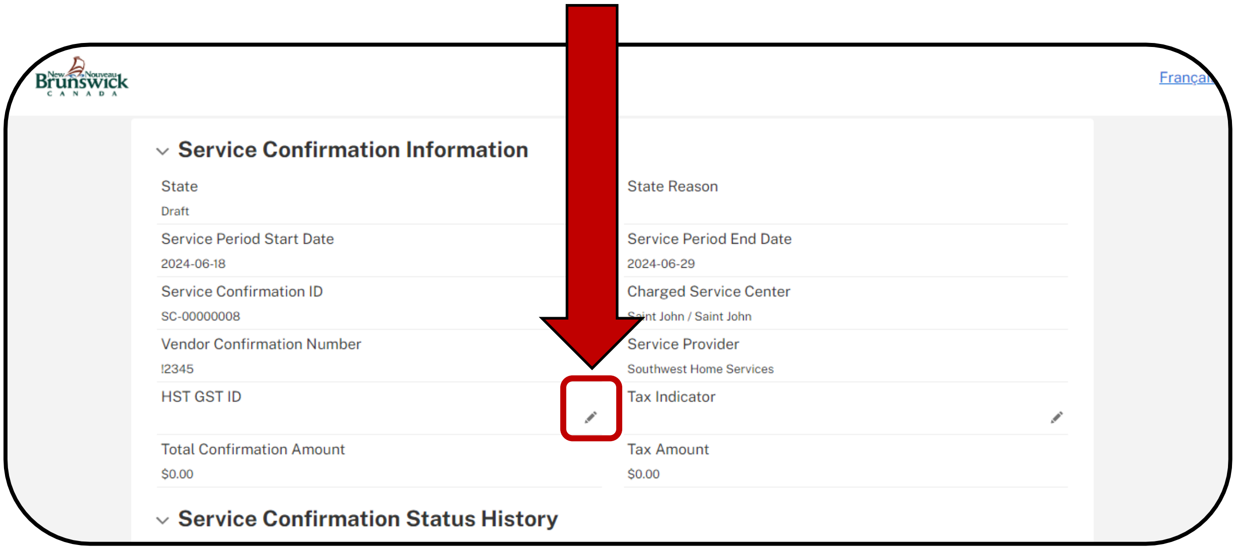


2. Once opened, scroll down to view the **Service Confirmation Information** fields.



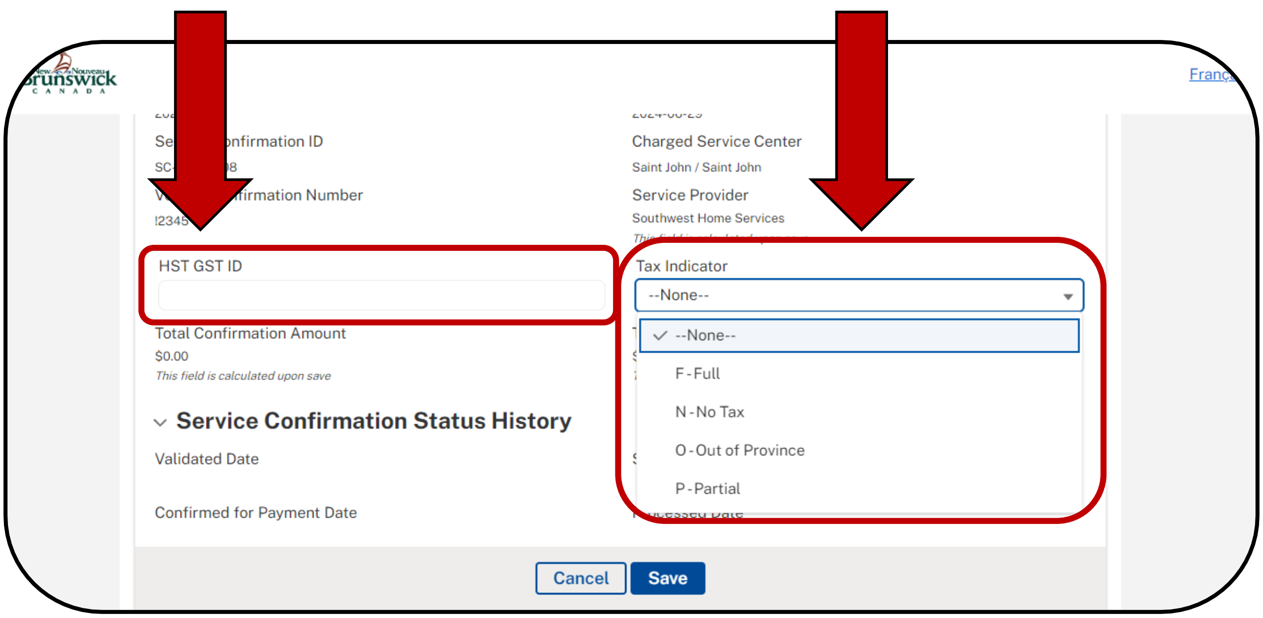
3. Locate the **HST GST ID** and **Tax Indicator** fields.

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



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

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



7. Click the **Save** button. The window refreshes and the changes made are now displayed.

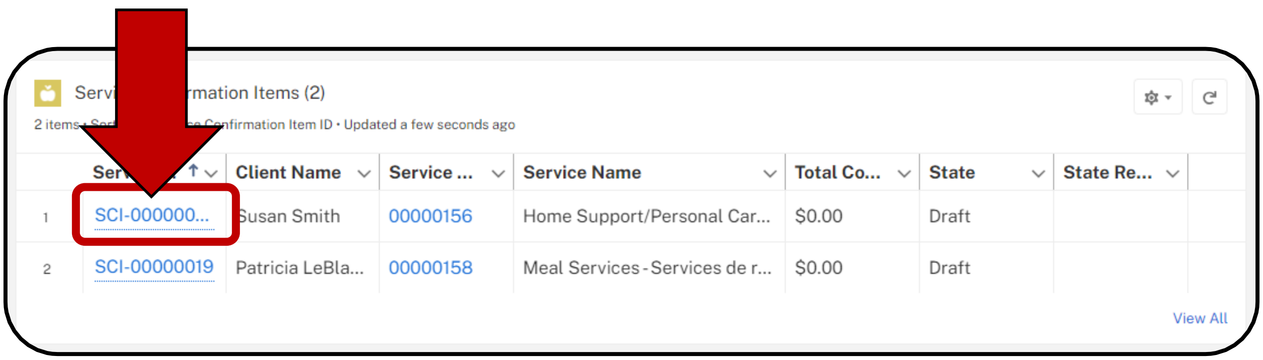
NOTE: You will receive an error message if:

a) Missing Tax Indicator & Missing HST GST ID (if applicable)

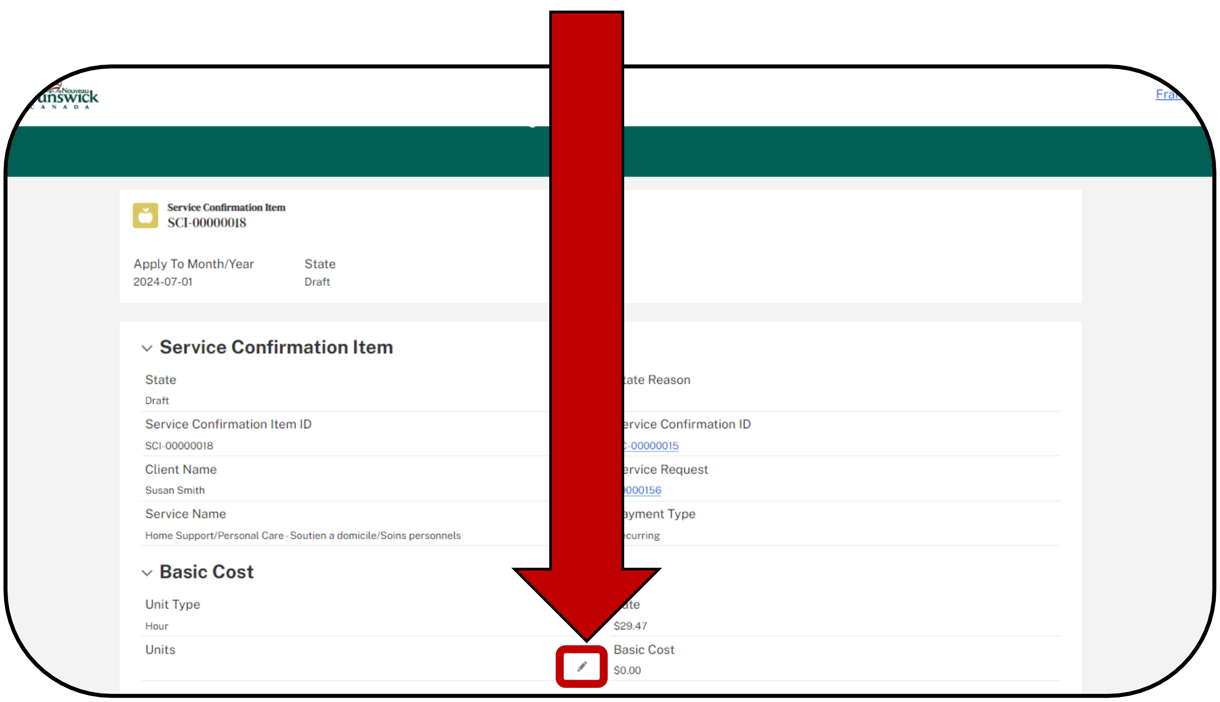
Submitting for Small Batch of Services (Manual Entry)

If you are submitting a service confirmation for a singular or small number of services, CommunityCareNB allows you to enter the information manually (i.e., one by one). If you are submitting for many services, you may want to refer to **Submitting for Large Batch of Services (CSV)** to learn more about how to complete this more efficiently.

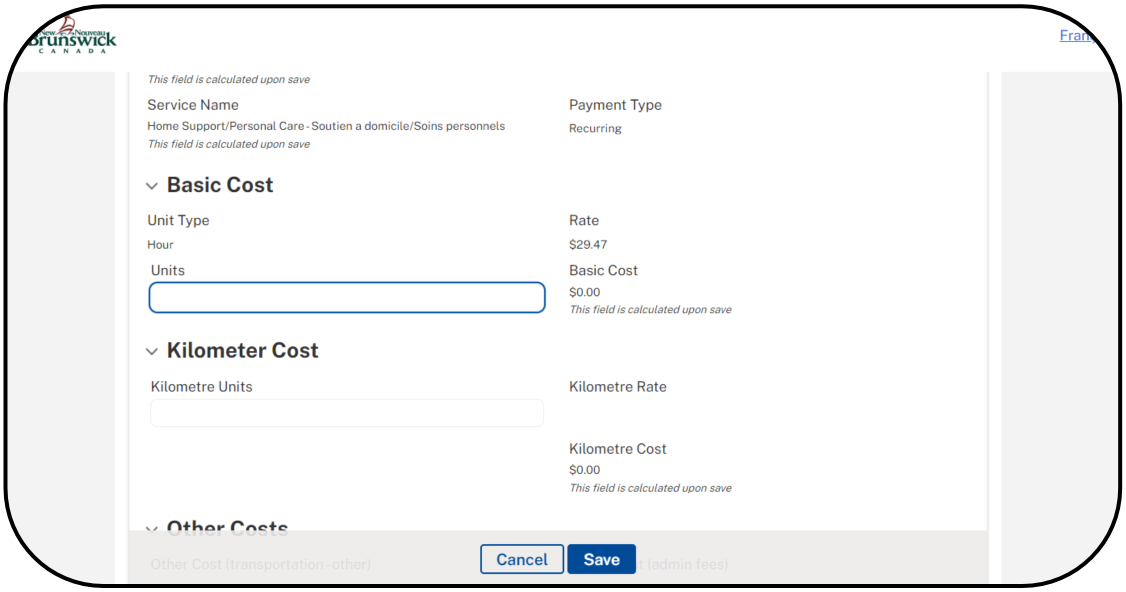
1. From the Service Confirmation Items field (i.e., each service request/order) select the applicable **Number**.



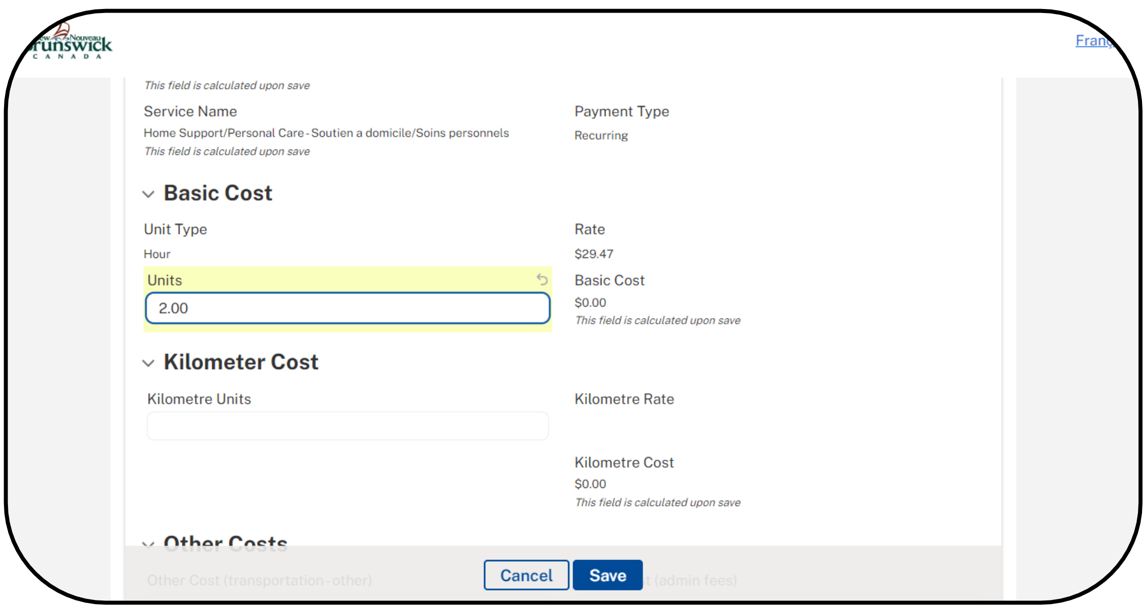
2. From the Service Confirmation Item detail window, select any **Pencil Icon**.



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



4. Enter in all information that is required by scrolling down (e.g., how many hours provided under units, kilometres, stat. holidays, etc.) and **click Save**.



NOTE: You will receive an error message if:

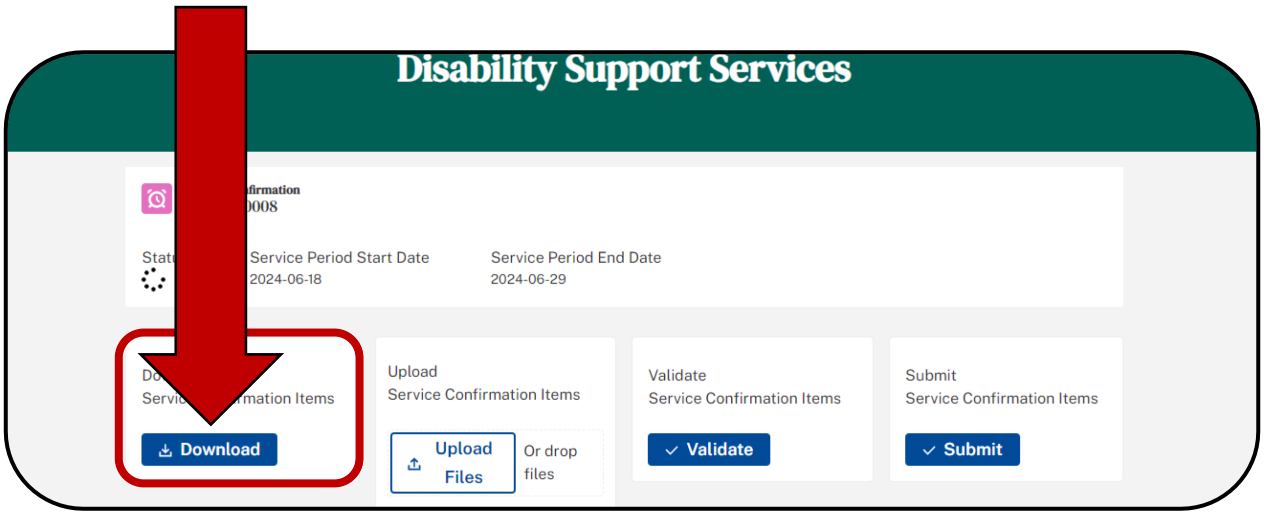
a. Units or Stat Holiday Units are not entered in quarter, half or whole units (e.g., **quarter units: 3.25 / 3.50 / 3.75**).

Submitting for Large Batch of Services (CSV)

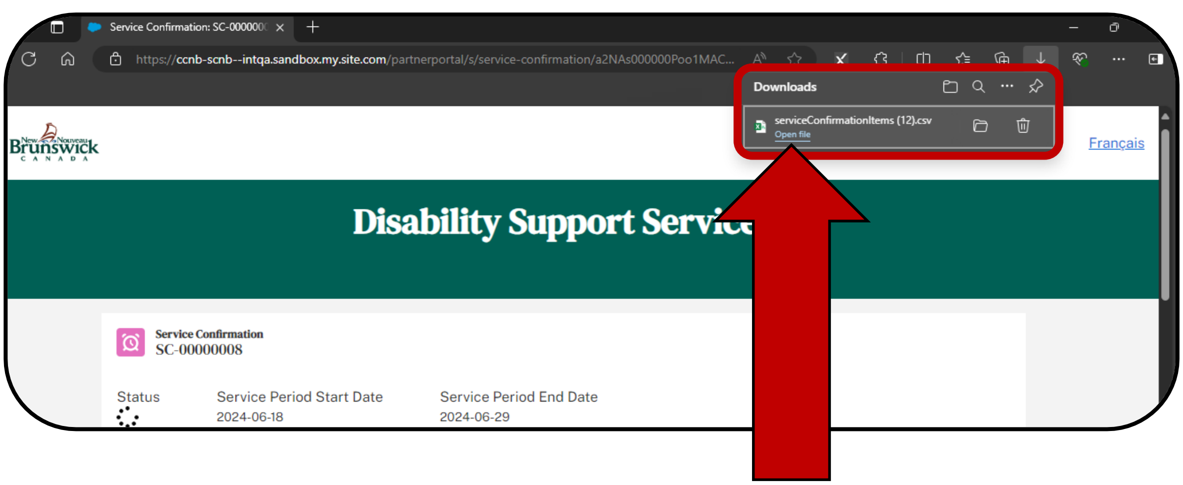
If you have a lot of services to confirm and submit at once, the most efficient way to do so is by downloading a CSV (Excel) that will gather information from the selected services during the creation process (re: How to Create a Service Confirmation)

How to Download Service Confirmation Items & Provide Required Information

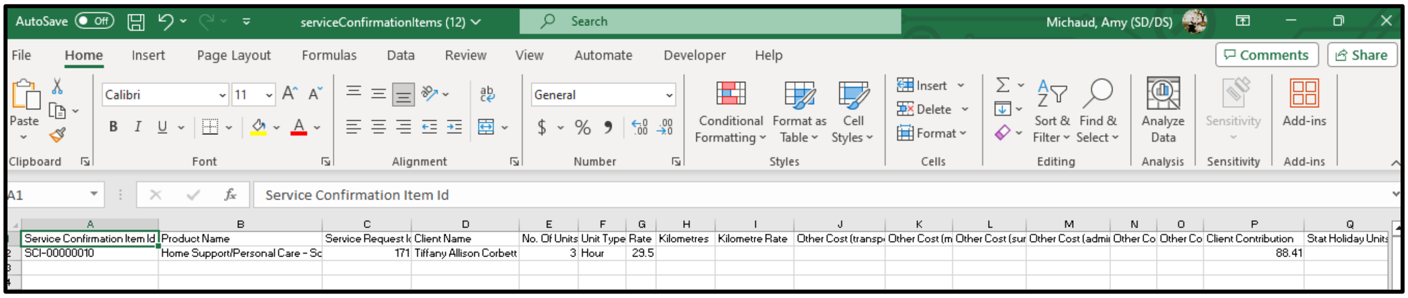
1. From the Service Confirmation (*draft*) window, select the **Download** pushbutton to download the **Service Confirmation Item file**.



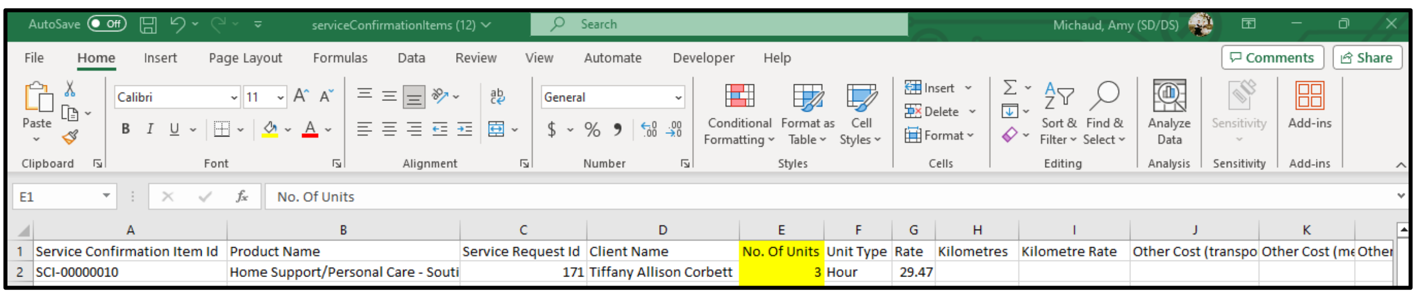
2. The **File** is downloaded. To **Open the File**, select the **Open File** hyperlink from the popup window in the top right corner of your browser.



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



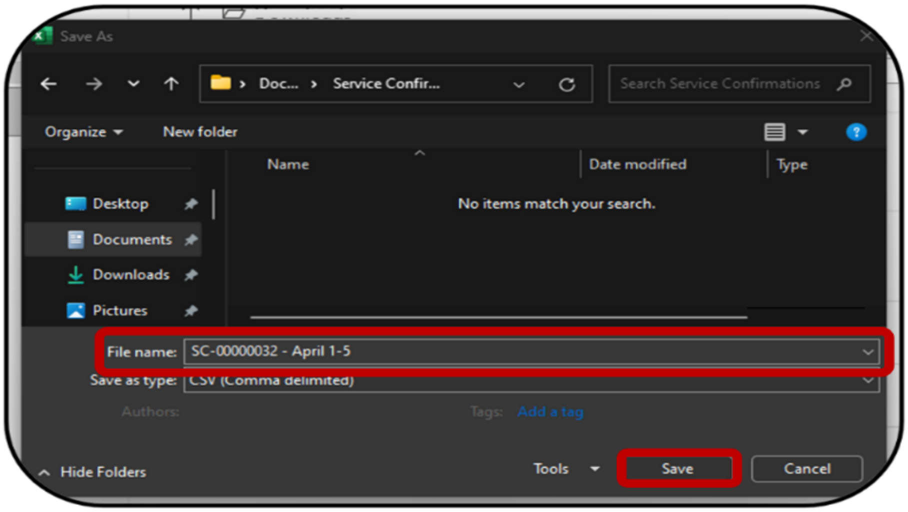
4. Enter the **No. of Units** (e.g., hours, days, etc.) that the client received for the indicated service period (e.g., week, month).



5. 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.**

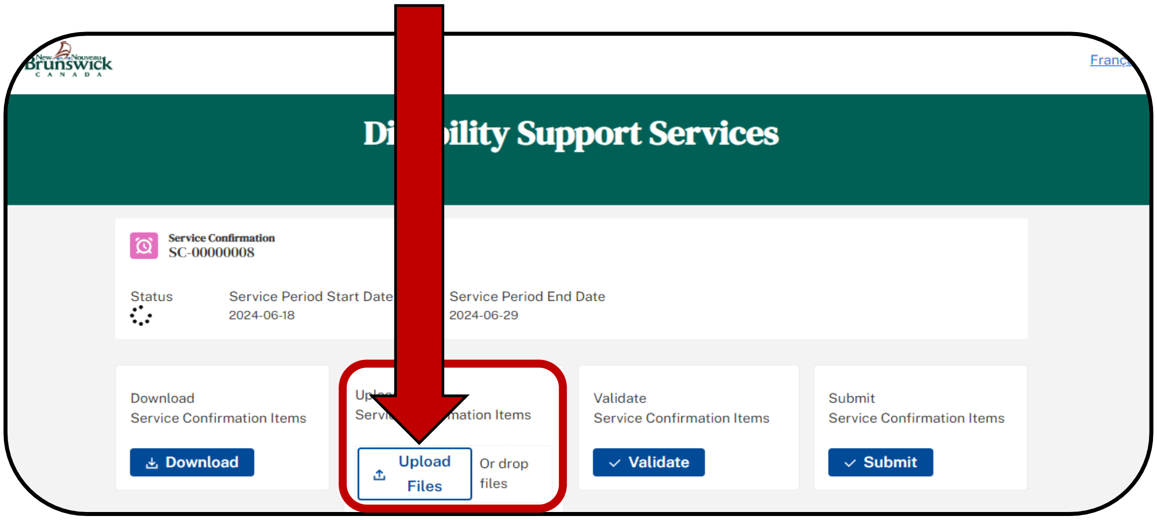
> NOTE: there are fields (e.g., kilometers, other costs) that will not be relevant to all services, simply skip the cells that do not apply to your service.

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**.

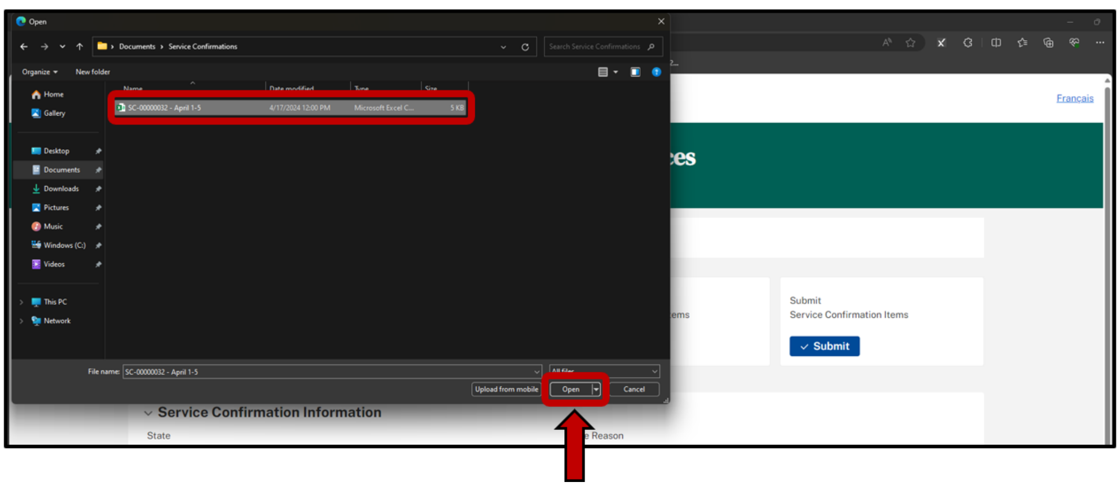


How to Upload Service Confirmation Items (CSV)

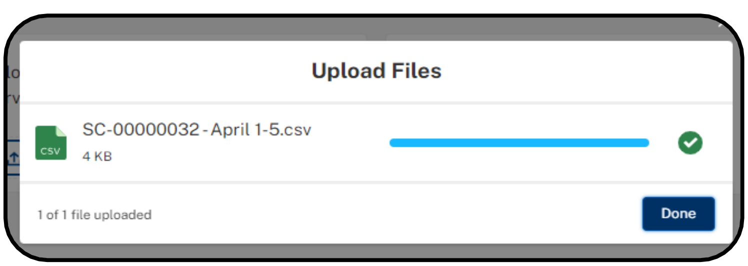
1. On the applicable Service Confirmation (*draft*) window, select the **Upload** pushbutton **OR** drag and drop the file.



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.

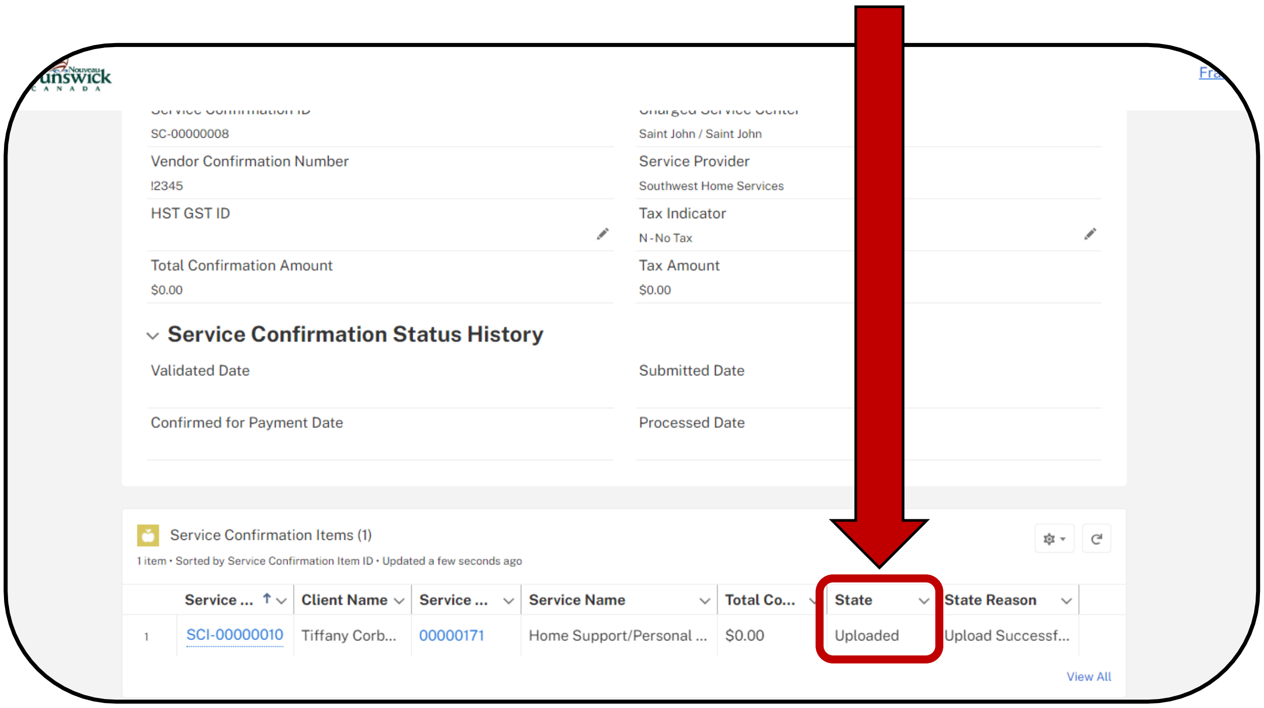


NOTE: You will receive an error message if:

a. Uploaded the wrong CSV file to a Service Confirmation

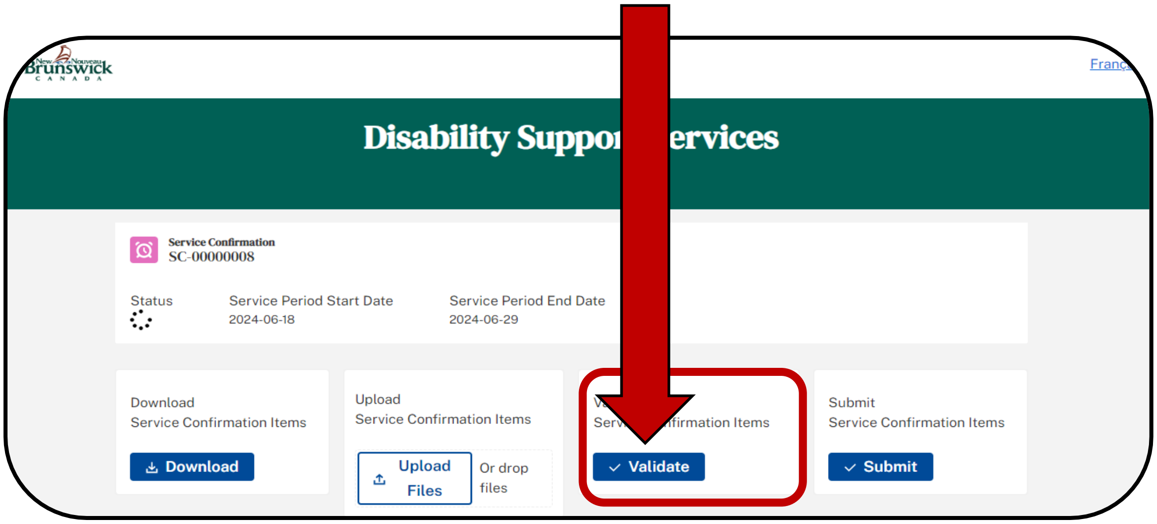
4. A confirmation message appears.

5. Scroll down and locate the Service Confirmation Items field. The **State** for each item will now display "uploaded".

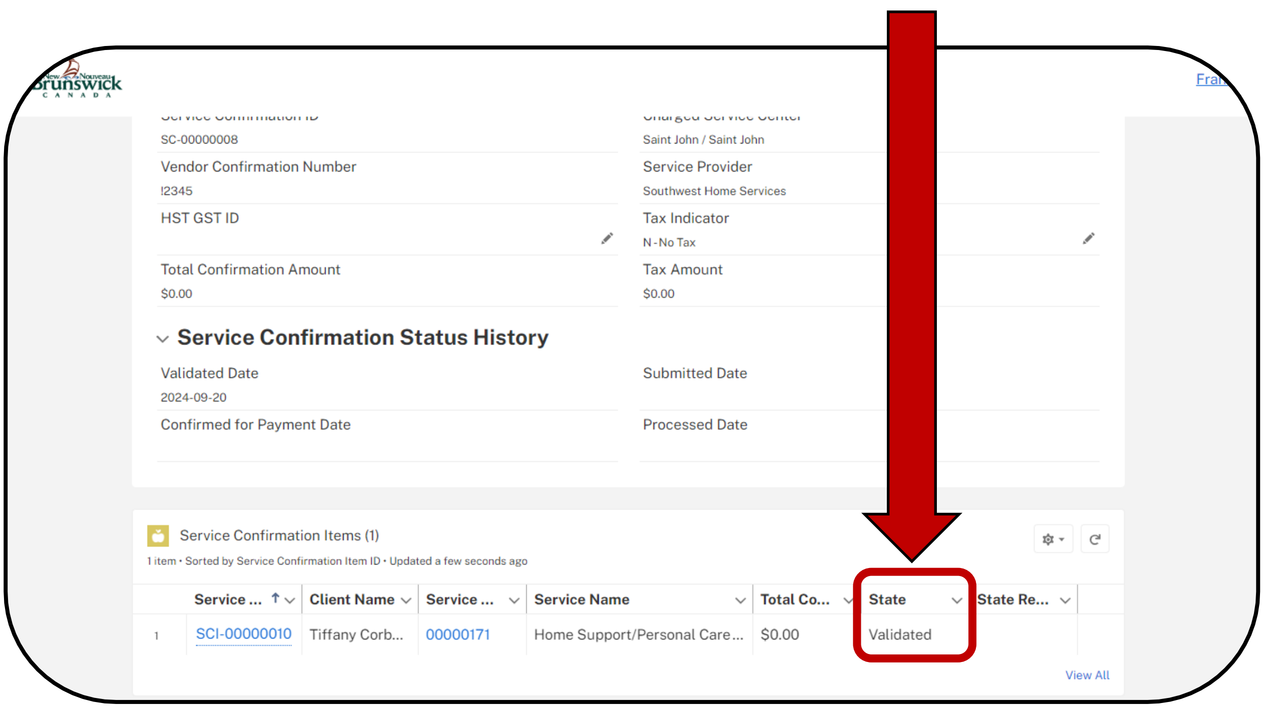


Validating Services Provided

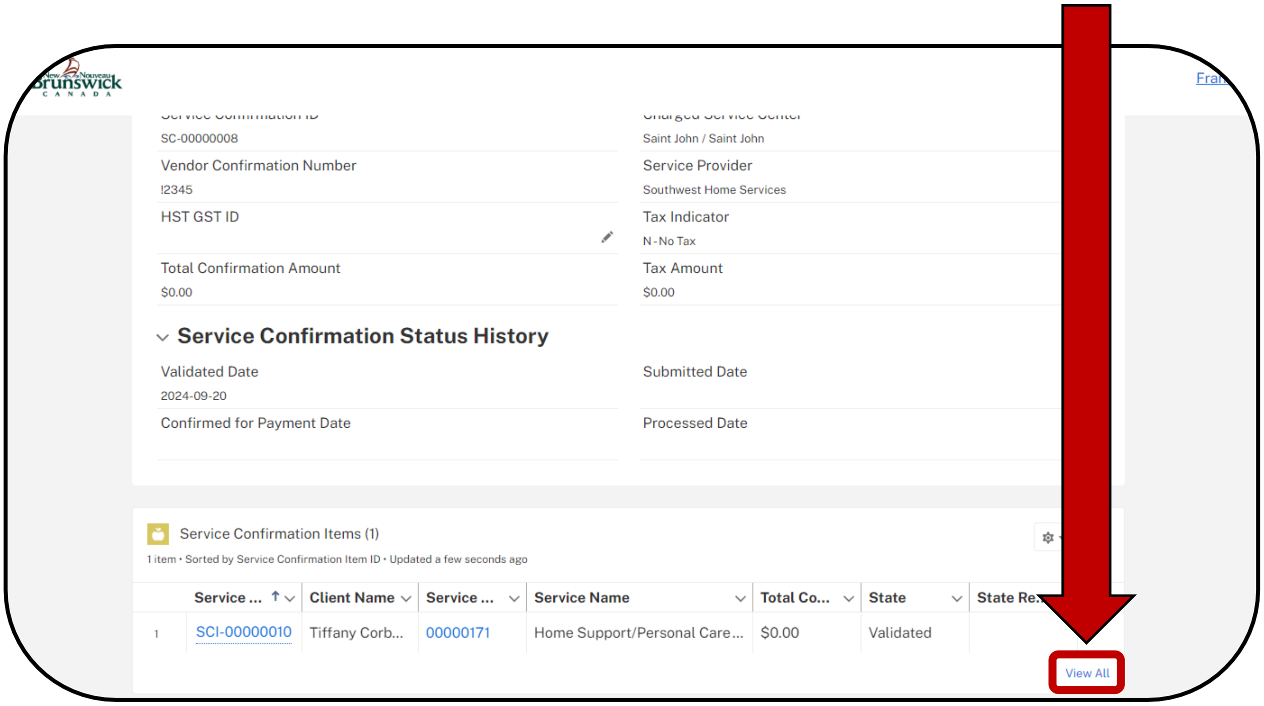
1. Once all items are up to date and the information provided is ready to be validated (e.g., the correct number of hours were entered into the Service Confirmation Items document), select the **Validate** pushbutton.



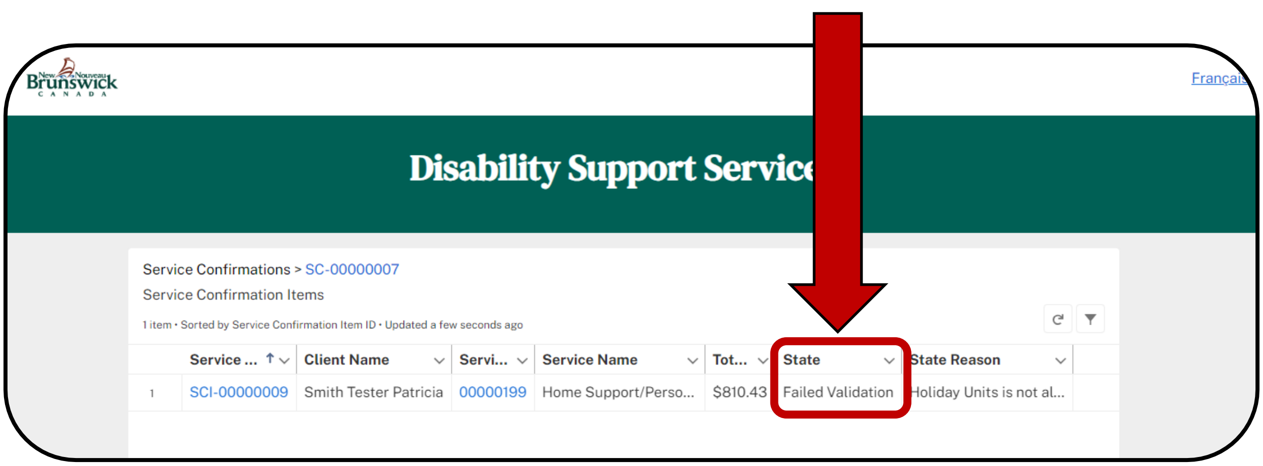
2. The page will refresh changing the **State** of all service confirmation items.



3. 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.



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

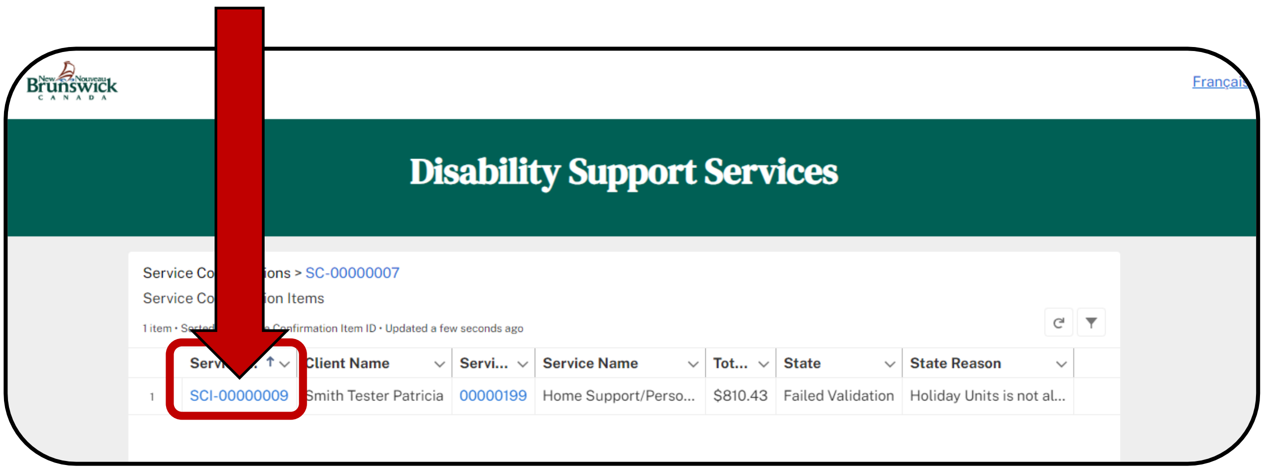


TIP: Click the ***State*** column header to sort the list – it will place all Failed Validations together.

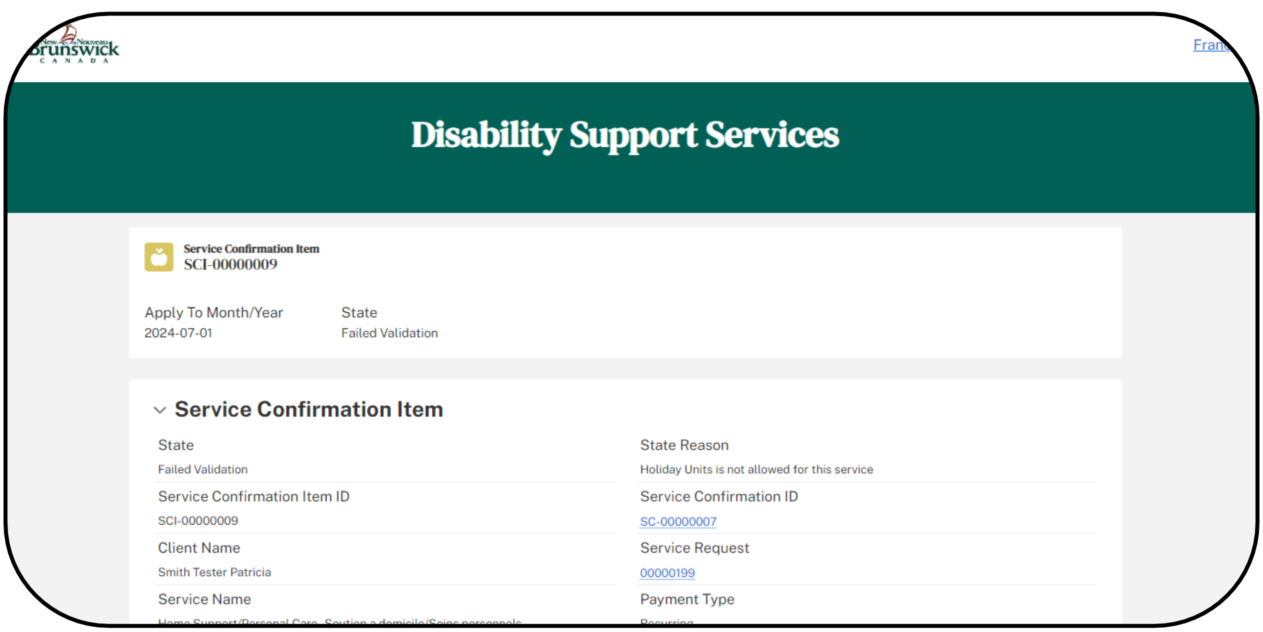
Failed Validation

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. **NOTE:** If a Service Confirmation Item fails validation due to a 0$ value, the service confirmation can still be submitted.

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

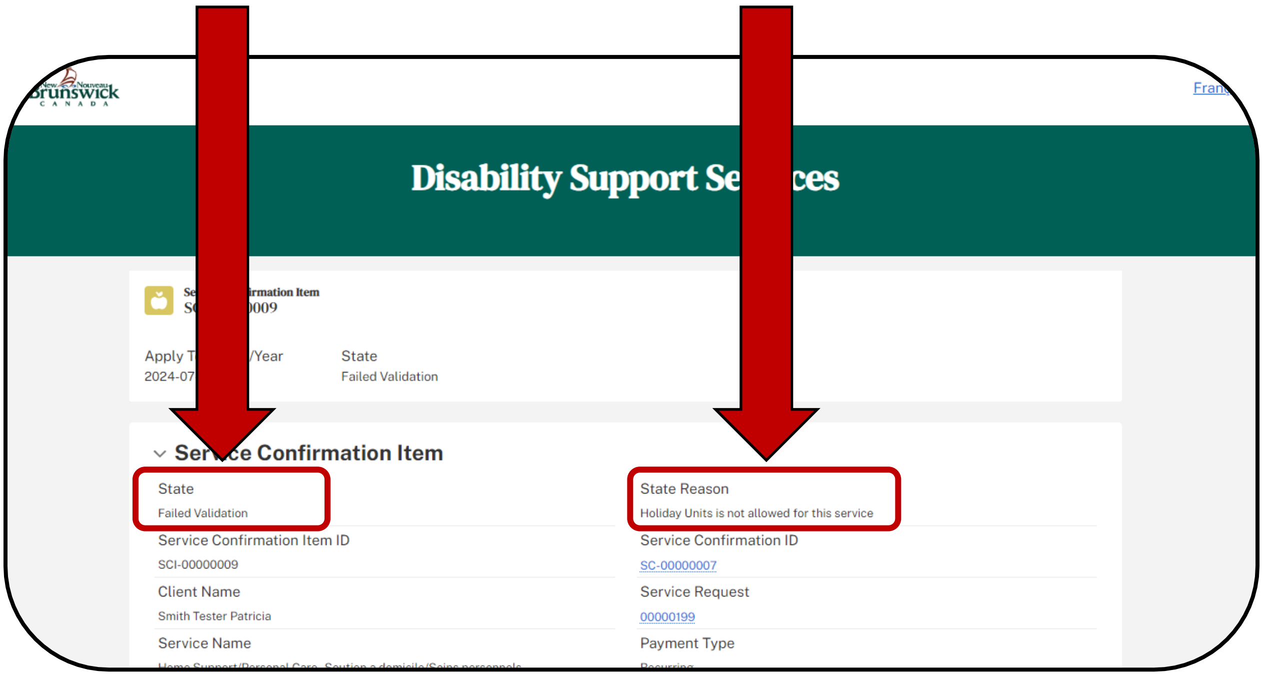


2. Service Confirmation Item details are displayed.



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.

Makes Changes to Individual Services

If the amount of Service Request Items is small (e.g., 2 Service Confirmation Items), rather than downloading and uploading the CSV, CommunityCareNB allows for the information to be entered manually. Refer to Correcting & Resubmitting Services that Failed Validation to learn more.

Additionally, Service Confirmation Items can be edited if 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.

Submitting Service Confirmations

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

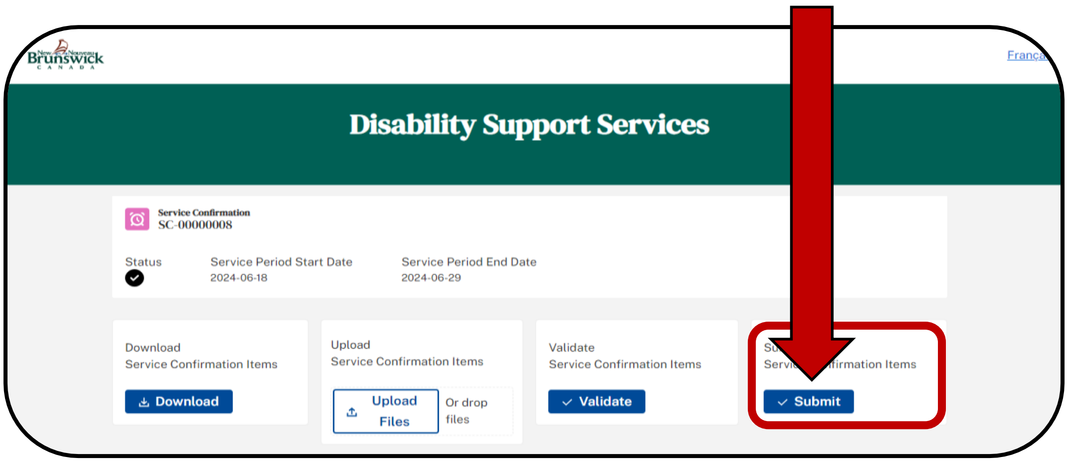
1. If all items passed the validation step, you can submit the Service Confirmation.
2. If there are any failed validation items, you can:
   a) Make changes immediately, repeat the validation process, then submit validated service confirmations.
   b) Make changes later once the issue has been resolved (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.

VERY IMPORTANT: If an error/problem is detected on a service confirmation after you have submitted it, **do not** attempt to resubmit it. **Always** contact the support team (communitycaresupports_soinscommunautaires@gnb.ca) to correct any errors/problems found on a service confirmation after you have submitted it. **Do not resubmit your request - this could be construed as fraud**.

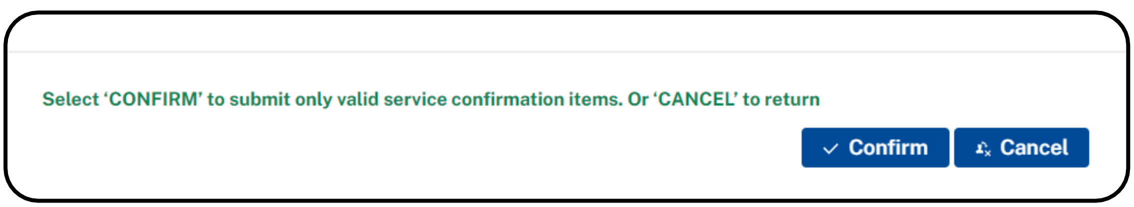
How to Submit Service Confirmations

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.**

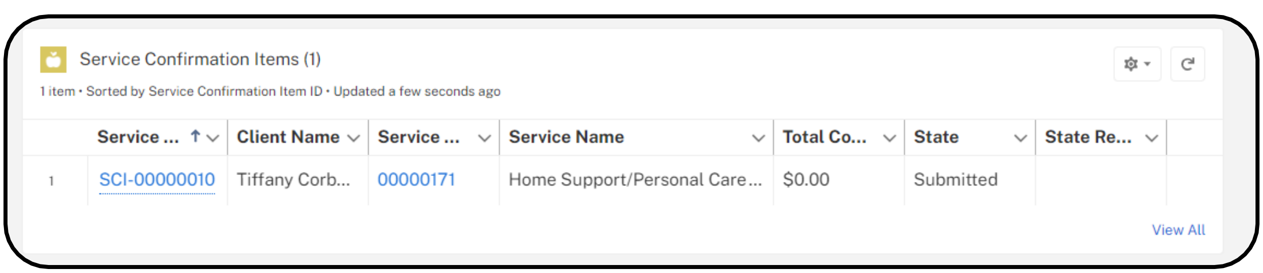
1. On the Service Confirmation, select the **Submit** button.



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**.



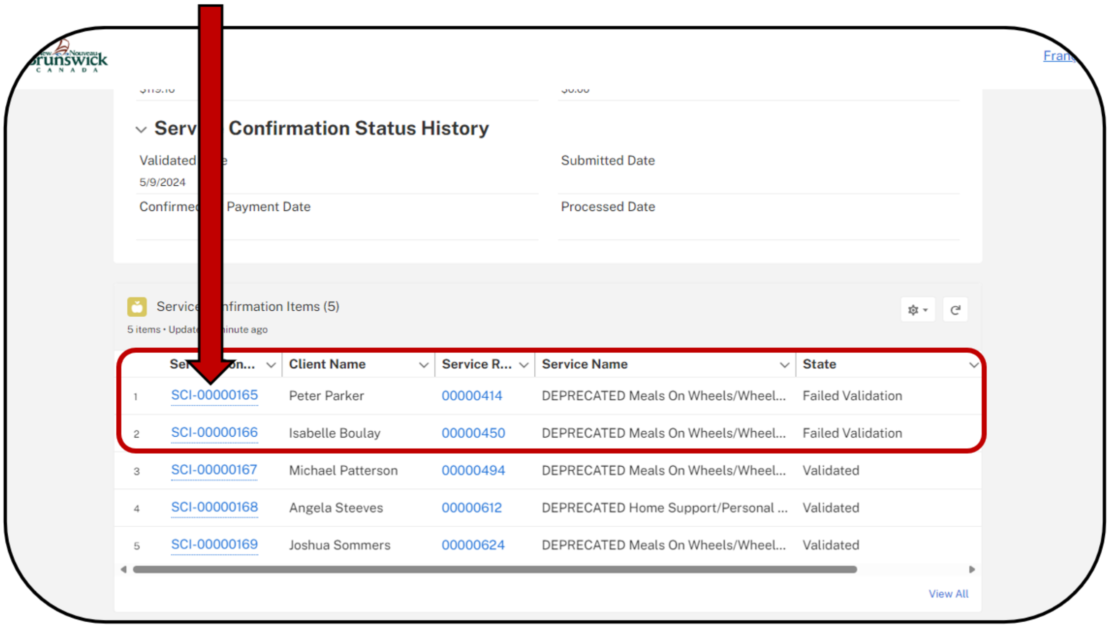
3. The window will refresh, and the **State** of the Service Confirmation Items now say **Submitted**.



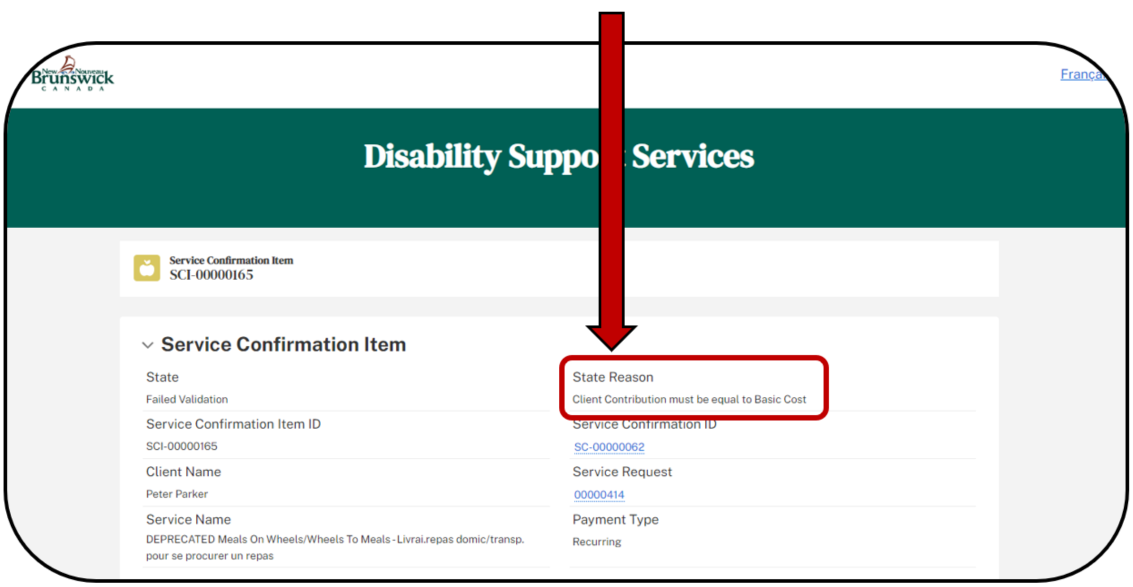
Correcting & Resubmitting Services that Failed Validation

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).

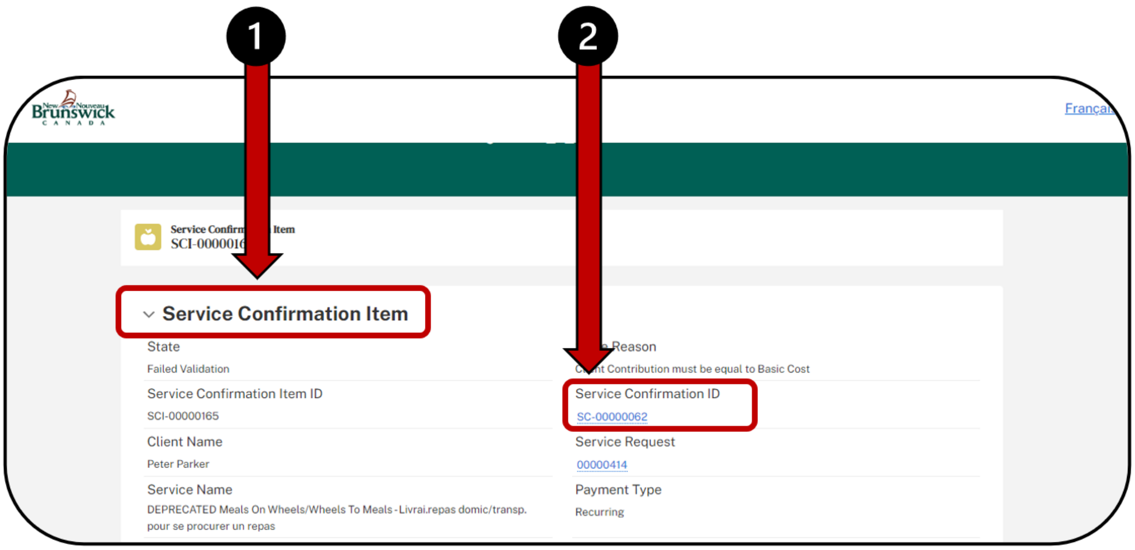


2. **Locate** the **State Reason** for the failed validation. This will help you to identify and resolve the failed validation accordingly.

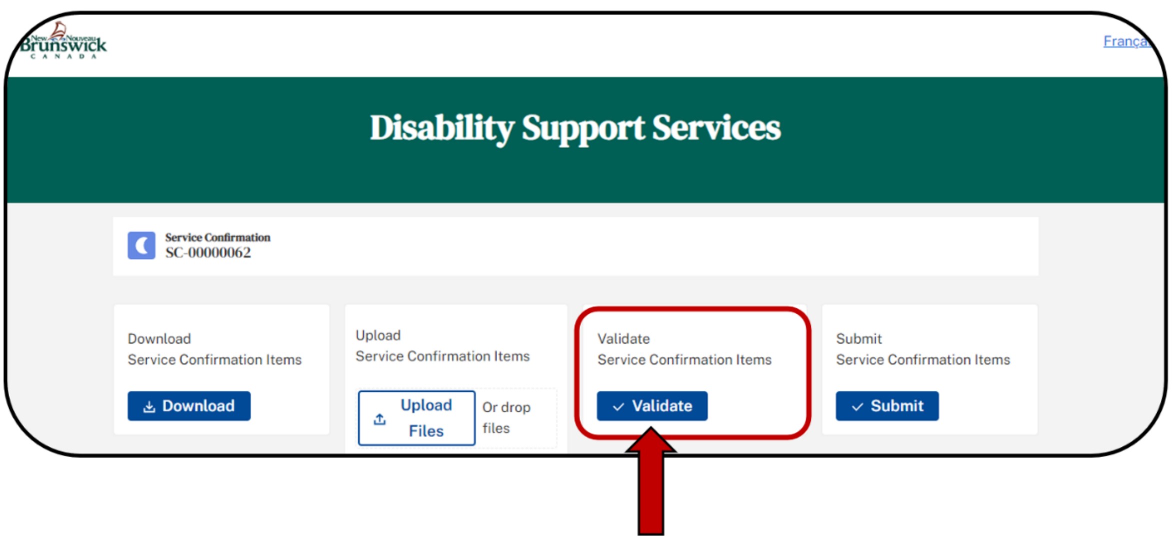


3. **Make the correction(s)** (re: Errors & Failed Validations list above and Capture/Modify Service Confirmation Items for more information on how to appropriately resolve and make corrections to items).

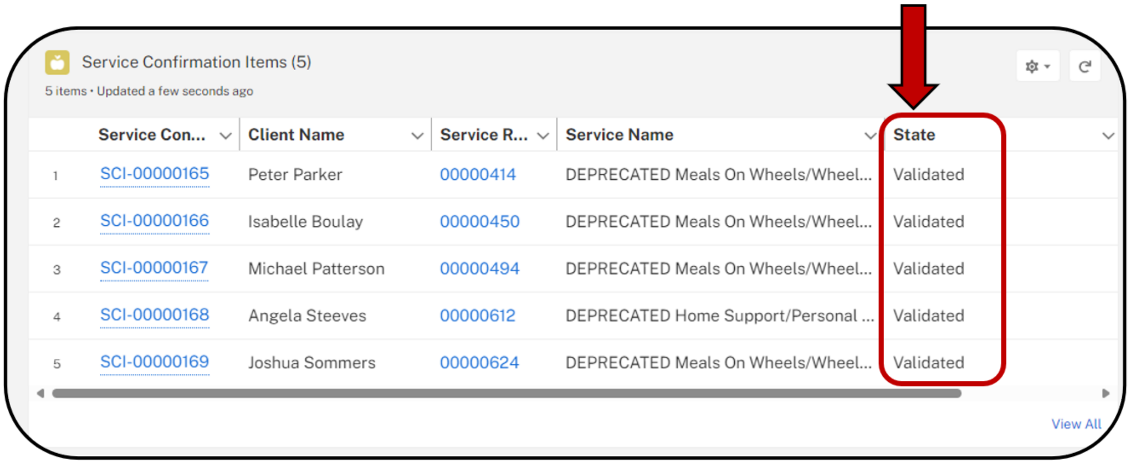
4. Once the correction has been made, locate the Service Confirmation Item header and click on the **Service Confirmation ID** hyperlink. This will bring you back to the Service Confirmation List where you can validate again.



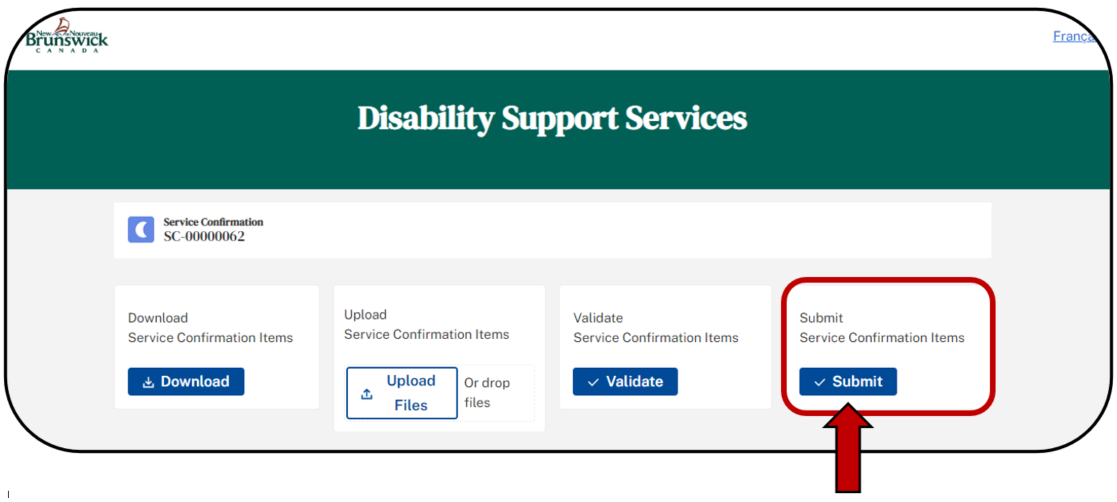
5. Select the **Validate** button to verify any corrections made.



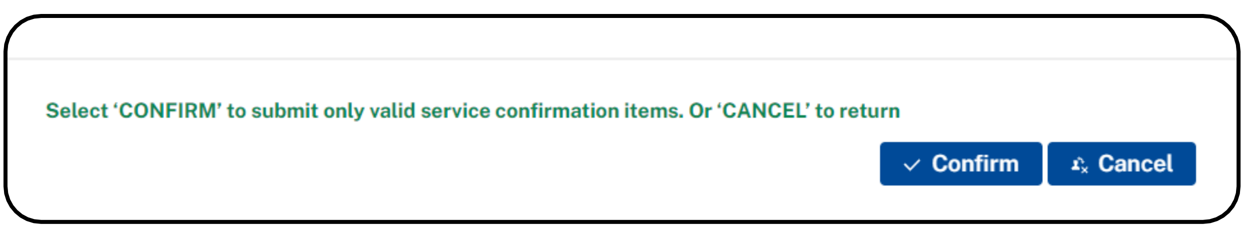
6. Verify that the Service Confirmation Items have been validated by scrolling down and checking the Items List.



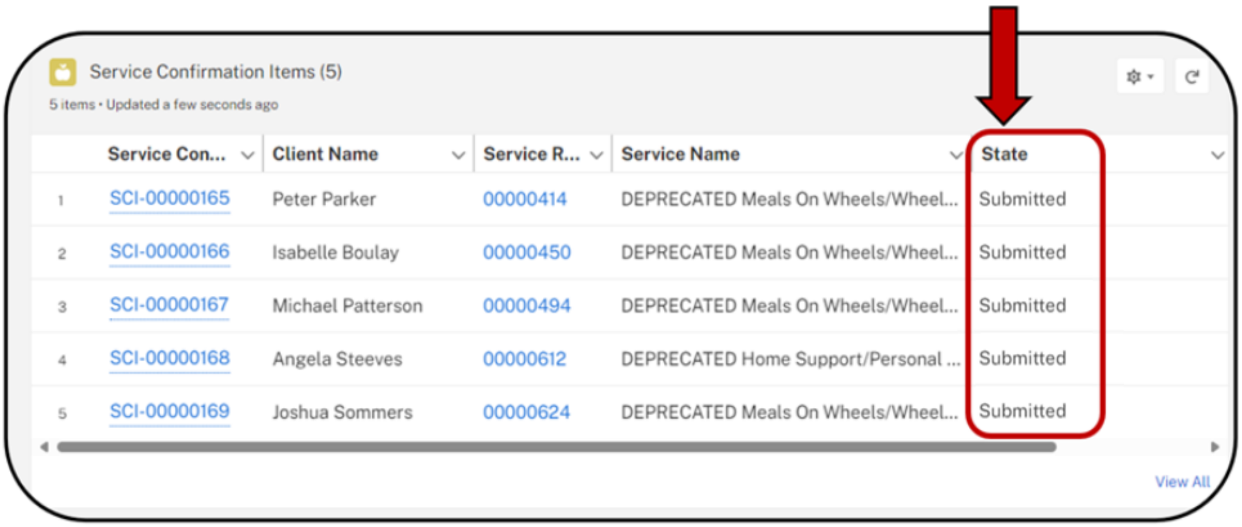
7. Return to the top of the page and **Select** the **Submit** button.



8. **Select Confirm**.



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



Service Confirmation Items (5)

5 items • Updated a few seconds ago

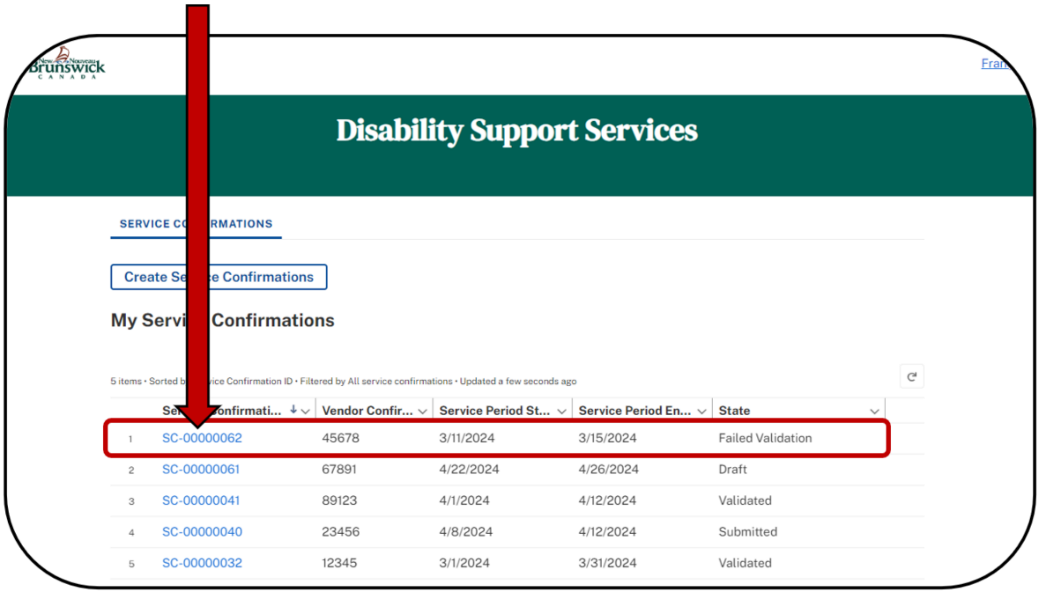
	Service Con...	Client Name	Service R...	Service Name	State
1	SCI-00000165	Peter Parker	00000414	DEPRECATED Meals On Wheels/Wheel...	Submitted
2	SCI-00000166	Isabelle Boulay	00000450	DEPRECATED Meals On Wheels/Wheel...	Submitted
3	SCI-00000167	Michael Patterson	00000494	DEPRECATED Meals On Wheels/Wheel...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

View All

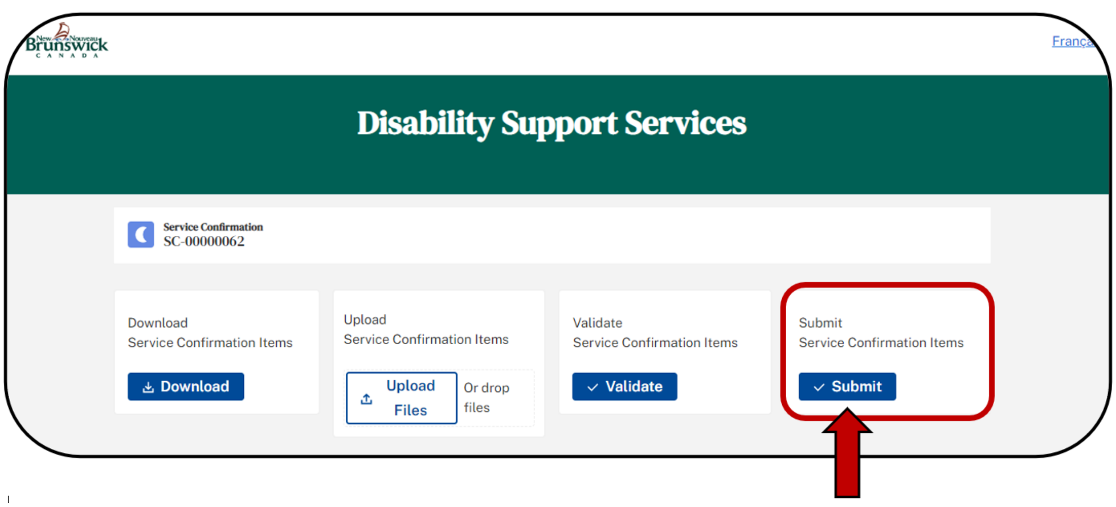
Submitting Services that Failed Validation

If 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.

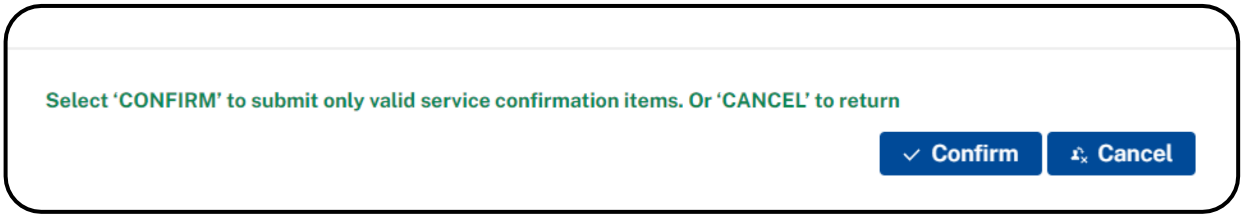
1. **Locate** and **Open** the Service Confirmation with a State of Failed Validation that is ready to be submitted.



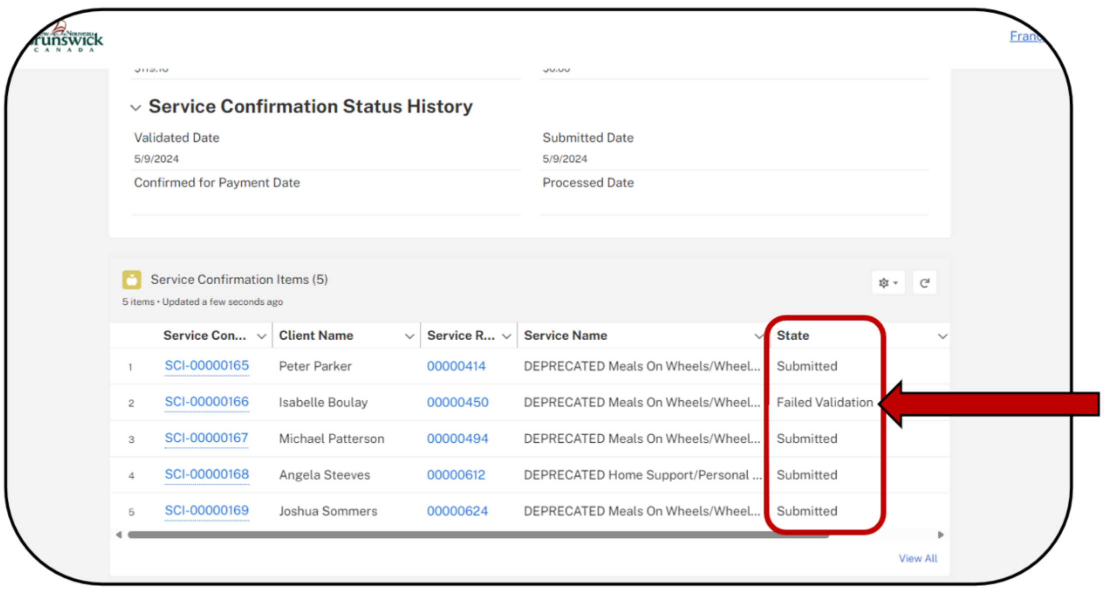
2. Once in the **Service Confirmation**, select the **Submit** button.



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**.

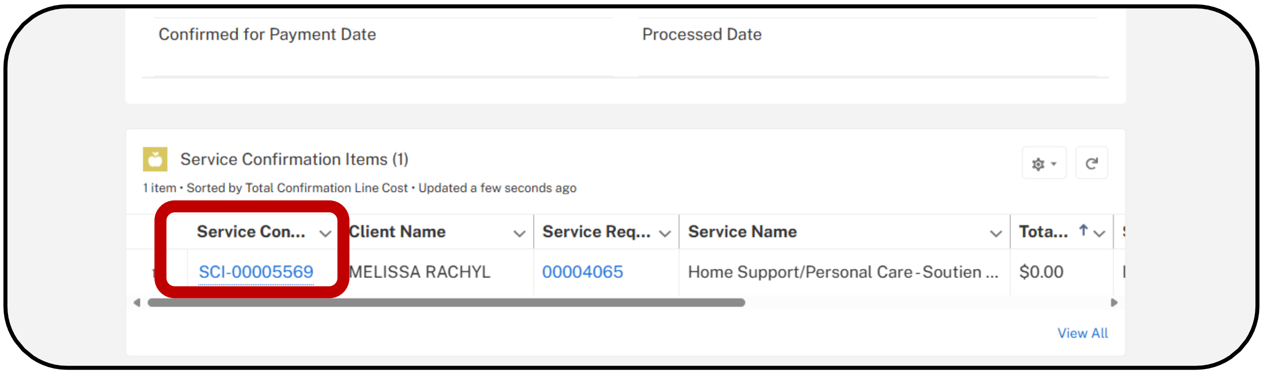


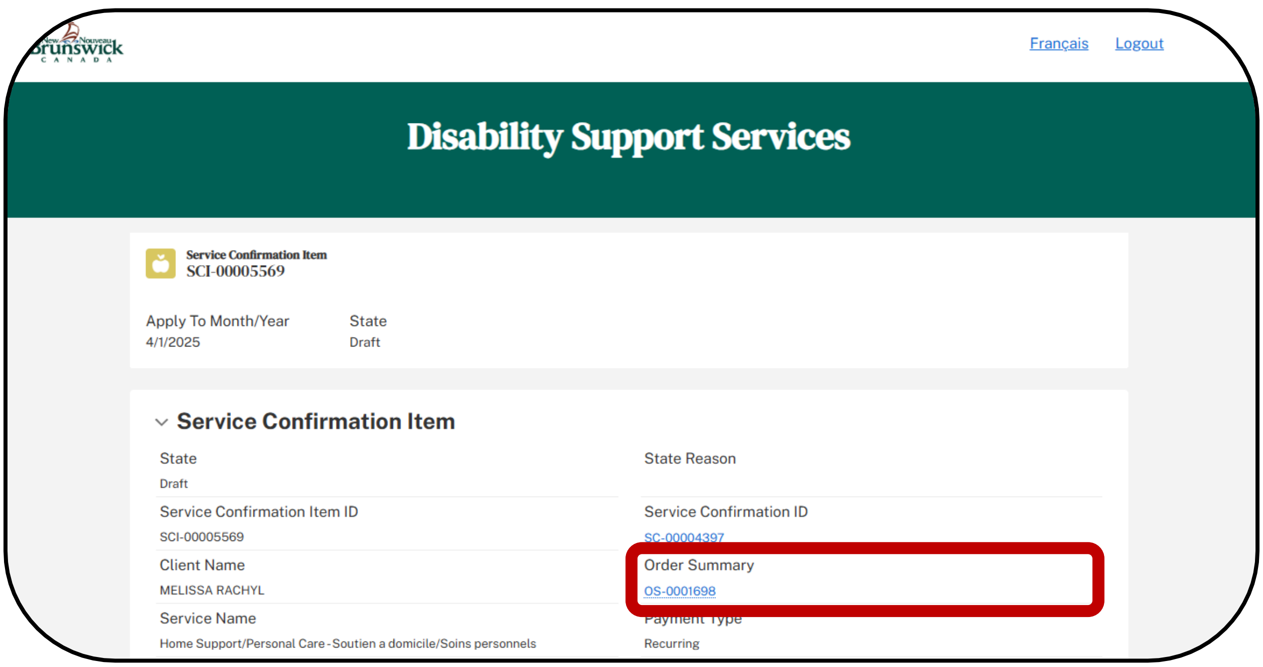
Log a Change Request

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 open the client's order summary and 'log a change request'. The example below shows how to open an order summary directly from the Service Confirmation Item.

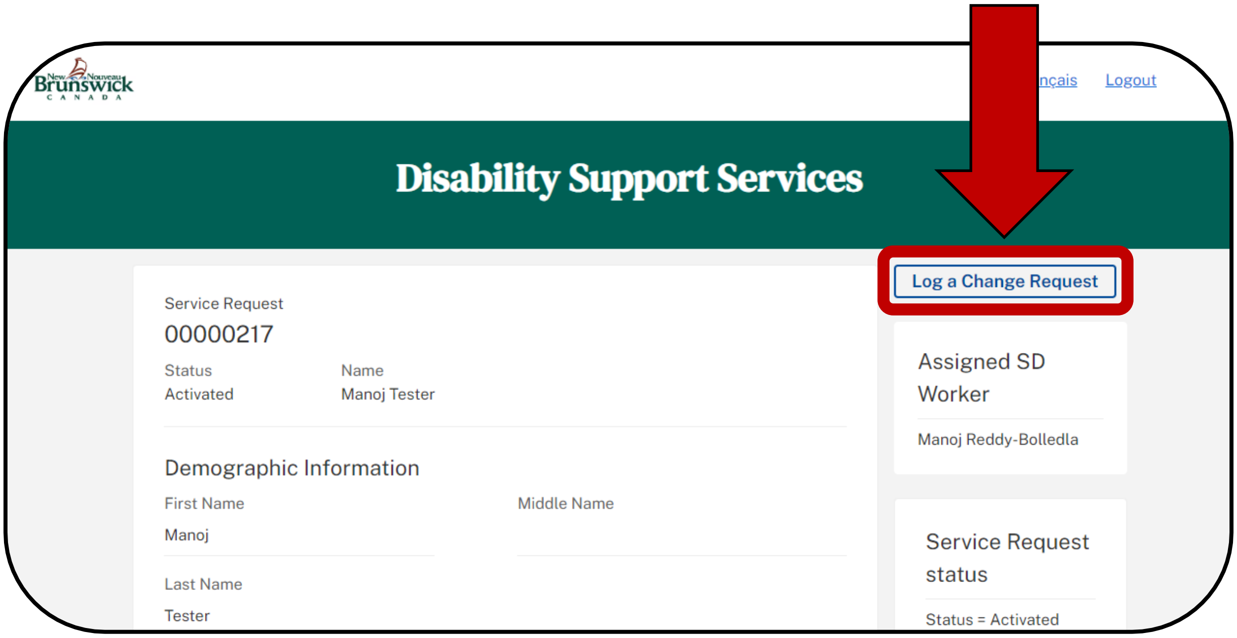
Note: These changes are done before sending for payment, and thus much easier to resolve.

1. Open the Order Summary from the applicable Service Confirmation Item (SCI) found on the Service Confirmation.

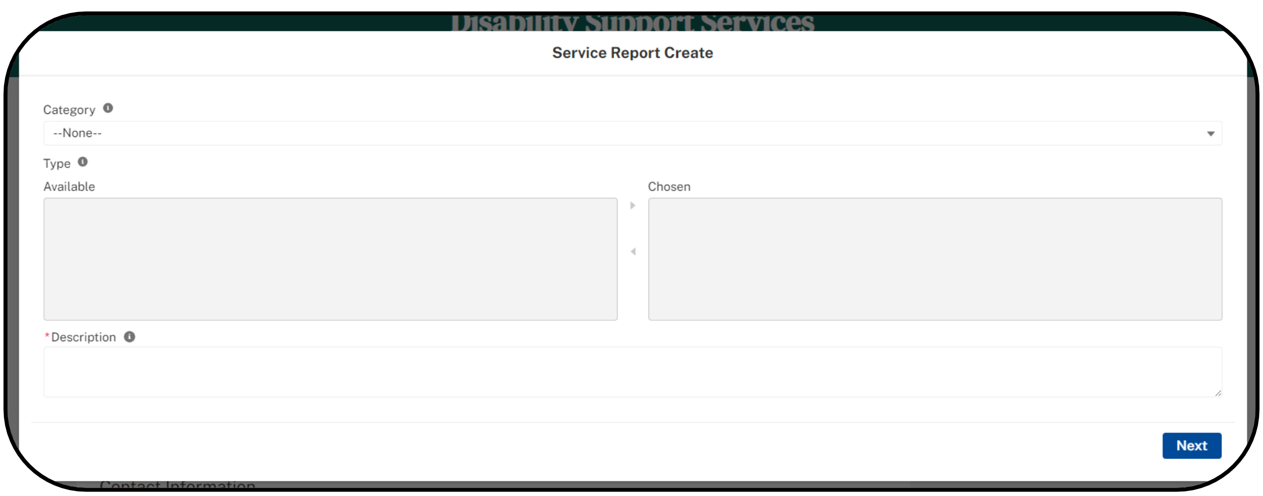




2. Select the **Log a Change Request** pushbutton.

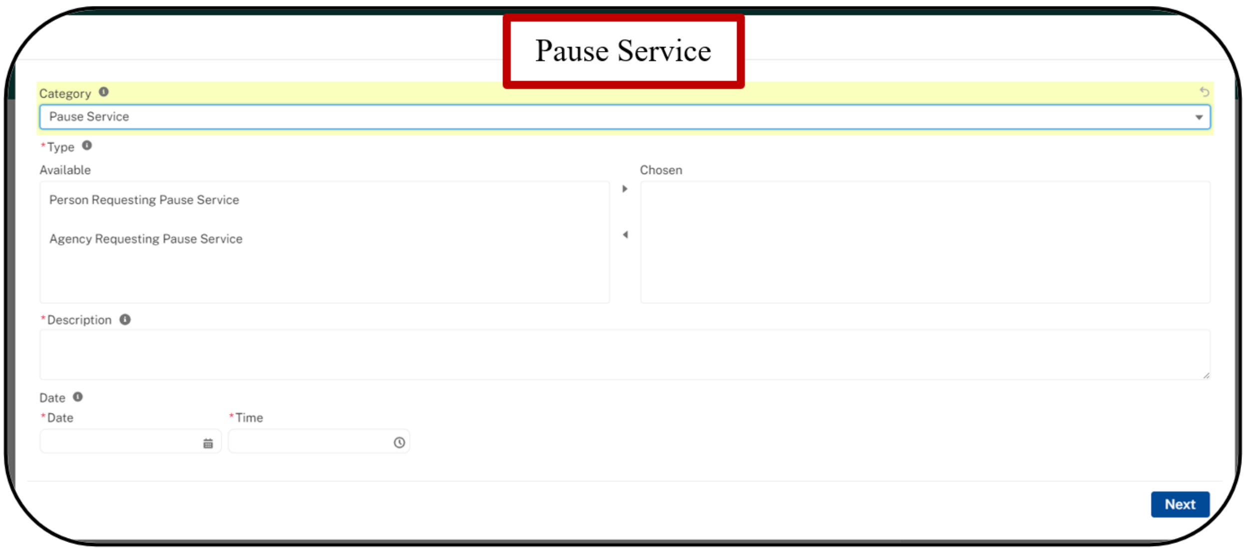


3. The Change Request Details pop-up window is displayed.



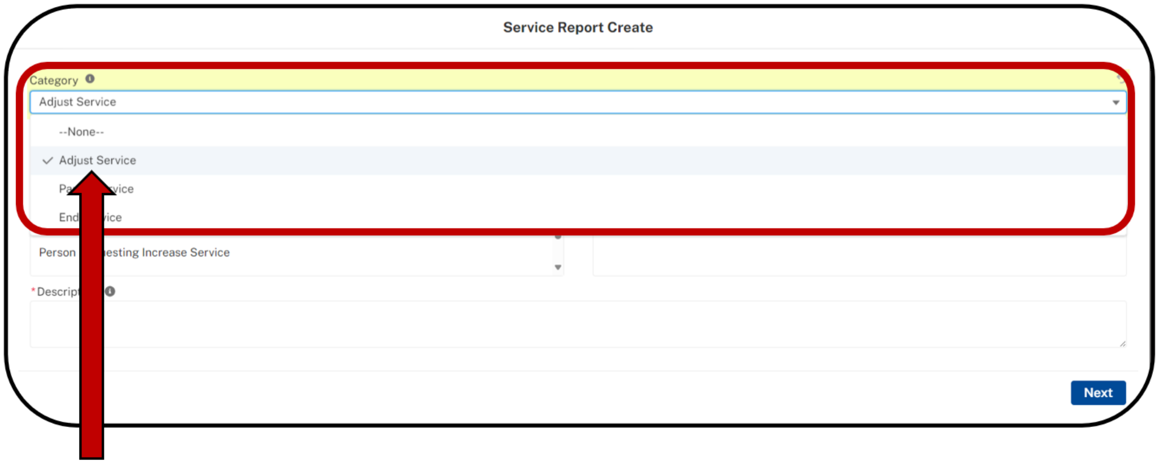
4. The Available types and mandatory fields that populate will differ based on the chosen Category in the dropdown menu (re: Adjust Service, Pause Service, End Service).


Adjust Service
Category
Adjust Service
*Type
Available
Chosen
Person Requesting Decrease Service
Agency Requesting Decrease Service
Person Requesting Increase Service
*Description
Next

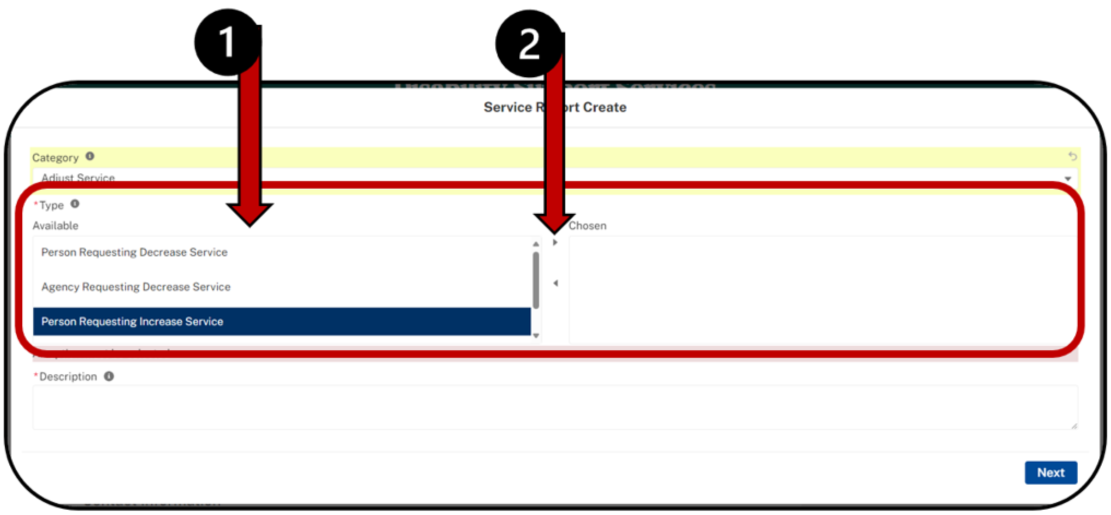

Pause Service
Category
Pause Service
*Type
Available
Chosen
Person Requesting Pause Service
Agency Requesting Pause Service
*Description
Date
*Date
*Time
Next

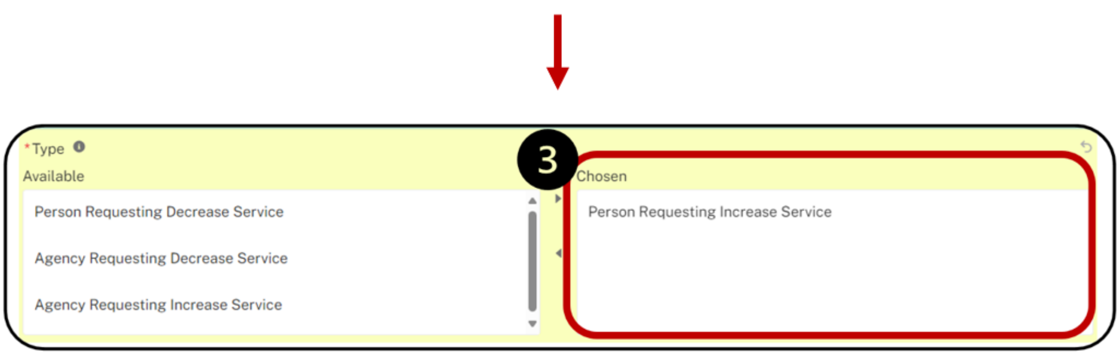

End Service
Category
End Service
*Type
Available
Chosen
Person Requesting End Service
Agency Requesting End Service
*Description
Date
*Date
*Time
Next

5. Select the applicable **Category**.



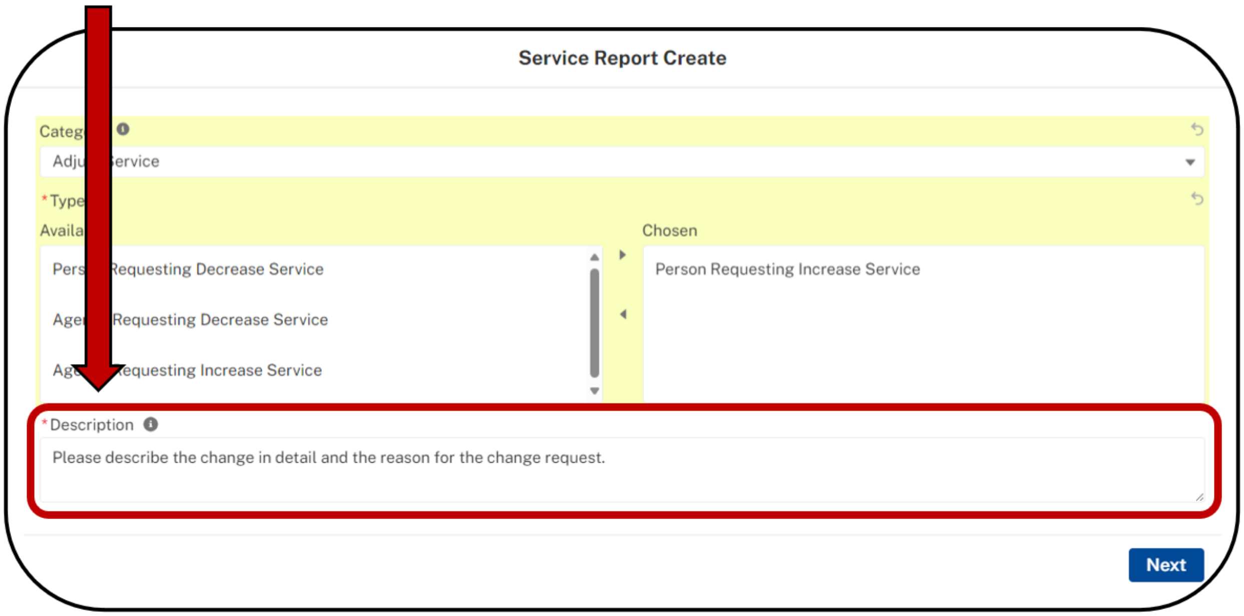
6. Select the provided **Change Request Type** (reminder: these are dependent on the category selected).



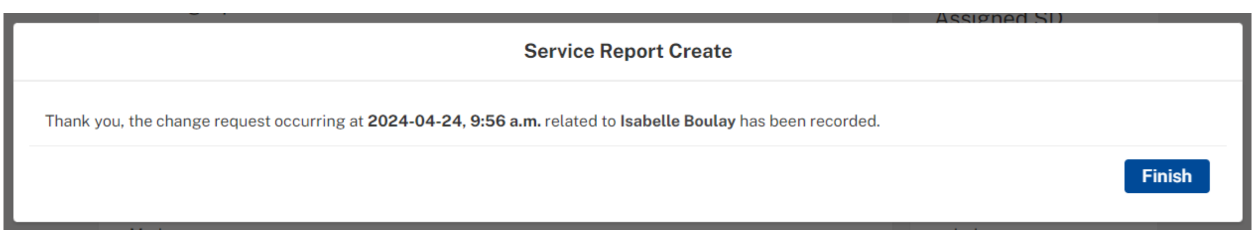


7. Provide a detailed description of the **Change Request**.

8. Click the **Next** pushbutton.



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



Service Delivery Dashboard

The Service Delivery Dashboard provides insight into service requests and service reports. This dashboard consolidates data into various report types such as all/new/active/terminated/expiring service requests service reports and more much more!

IMPORTANT: The Service Delivery Dashboard is currently in Beta, meaning that it is in full testing and feedback is greatly appreciated.

Service Delivery Reports

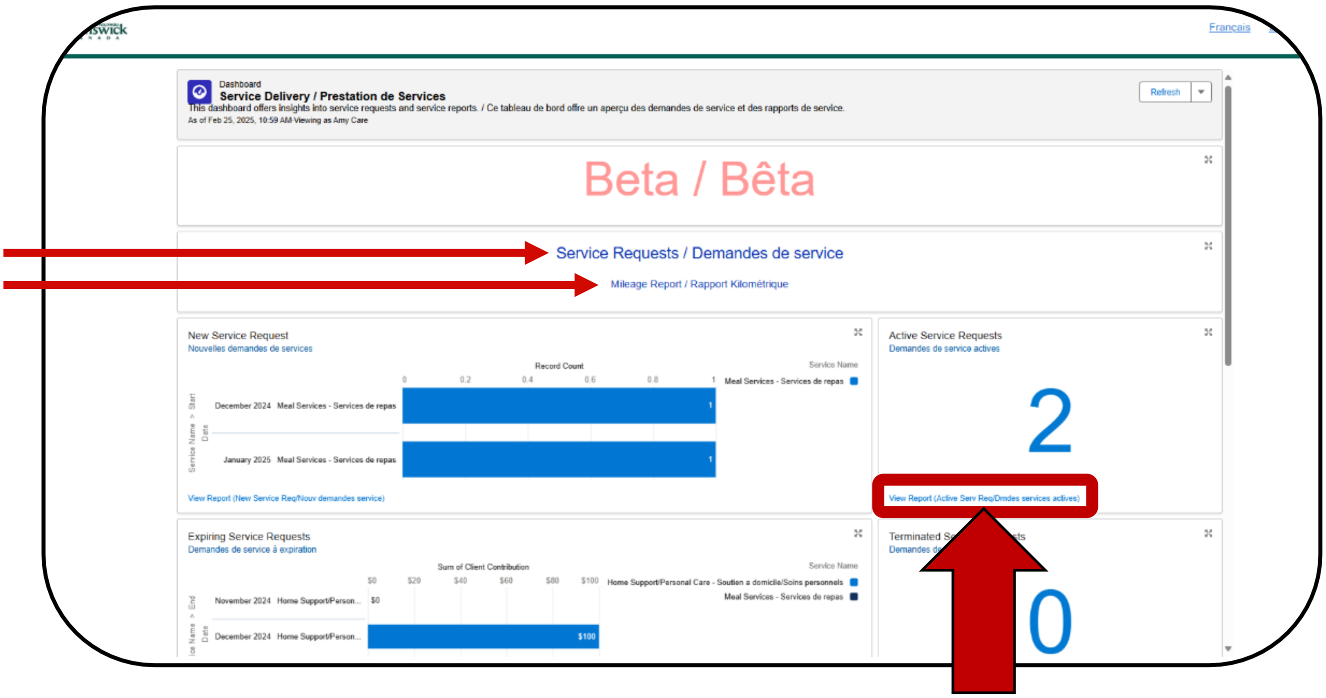
From this dashboard, the Service Provider can view:

- **Service Requests:** Report details of all service requests of basic cost type from last 120 days, grouped by status & Service Name with additional filters.
- **Mileage Report:** Report details all service requests of kilometer cost type from last 120 days, grouped by status & Service Name with additional filters.
- **New Service Requests**: Report details of all new service requests within the last 30 days.
- **Expiring Service Request:** Report details of all expiring service request within the next 30 days.
- **Active Service Requests:** Report details of all active service requests. A record count is displayed on the dashboard.
- **Terminated Service Requests:** Report details of all terminated service requests. A record count is displayed on the dashboard.
- **Service Confirmations:** Report details of all service confirmations from last 120 days, grouped by Apply to Month/Year and Service Name & State with additional filters.
- **Submitted Service Confirmations:** Report details of the Sum of Total confirmation Amount by Service Name, of **Submitted** service confirmations in the last 90 days.
- **Processed Service Confirmations:** Report details of the Sum of Total confirmation Amount by Service Name, of **Processed** service confirmations in last 90 days.
- **Total By Service:** Report details of the Sum of Total confirmation Amount by State, of Total by Service in Current and Previous year.
- **Failed Validation Service Confirmations:** Report details of the Sum of Total confirmation Amount by Service Name, of **Failed** Validation service confirmations in last 90 days.

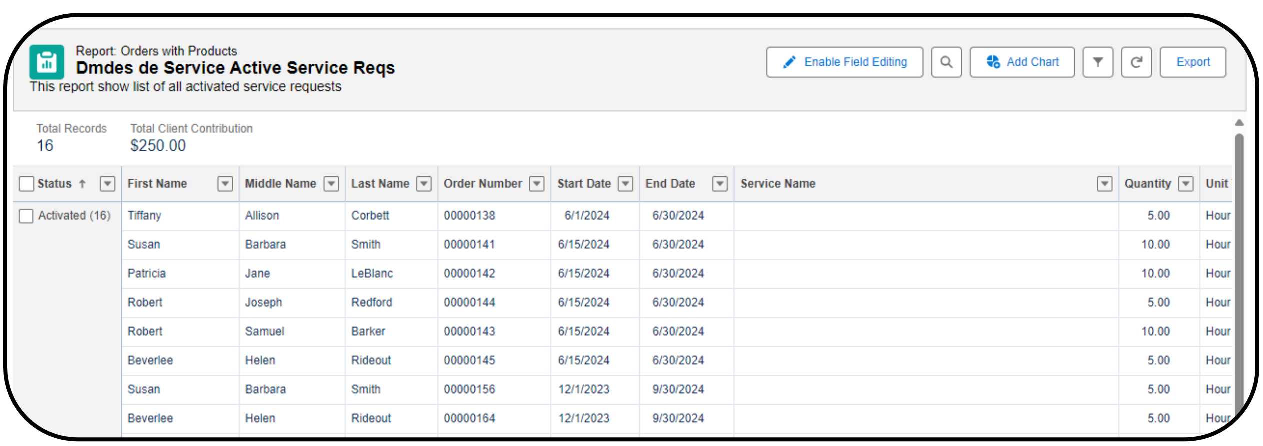
How to View Reports from Dashboard

From the Dashboard, the Care Coordinator can view individual details related to the displayed report types. By clicking on a **title or "view report" link** the Care Coordinator can view individualized and additional items that may not be displayed on the dashboard, as well export report details.

1. From the **Service Delivery Dashboard**, locate the applicable report type to view. The **View Report** hyperlink can be found at the bottom of any of the individual fields.



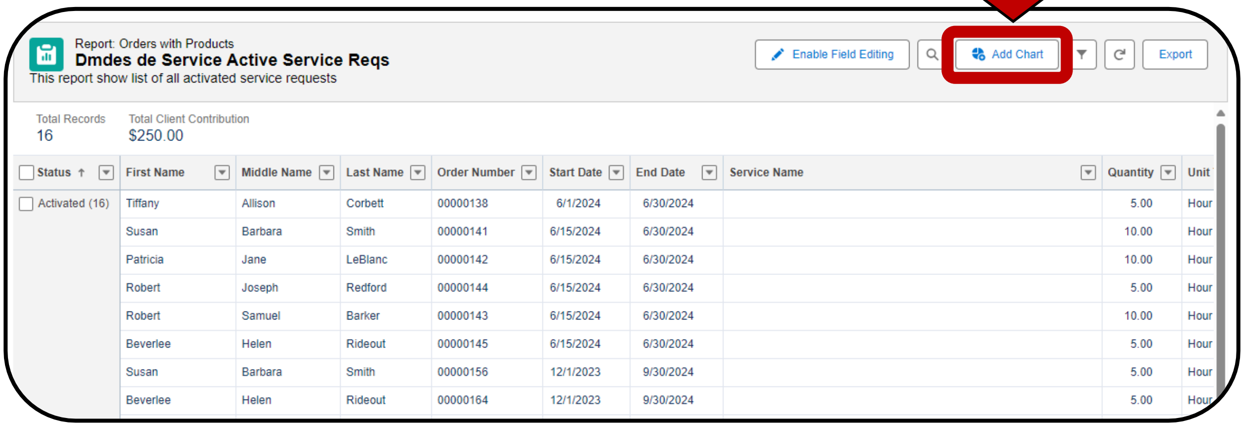
2. Once in the applicable **Report** window, a full list of related report items is displayed.


Report: Orders with Products
Dmdes de Service Active Service Reqs
This report show list of all activated service requests

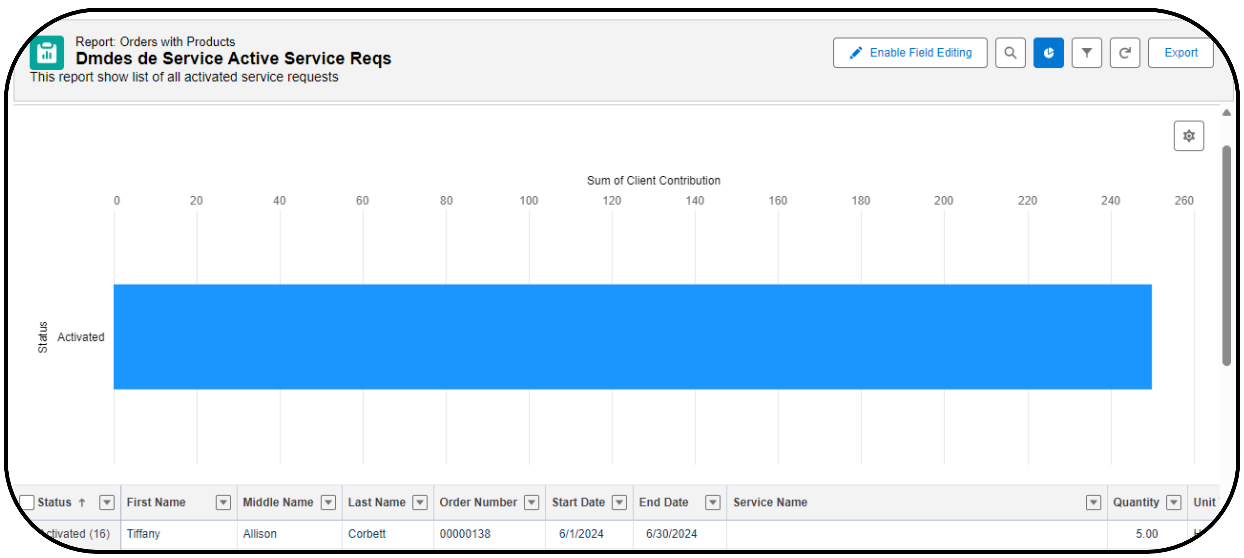
Total Records 16 | Total Client Contribution $250.00

Status	First Name	Middle Name	Last Name	Order Number	Start Date	End Date	Service Name	Quantity	Unit
Activated (16)	Tiffany	Allison	Corbett	00000138	6/1/2024	6/30/2024		5.00	Hour
	Susan	Barbara	Smith	00000141	6/15/2024	6/30/2024		10.00	Hour
	Patricia	Jane	LeBlanc	00000142	6/15/2024	6/30/2024		10.00	Hour
	Robert	Joseph	Redford	00000144	6/15/2024	6/30/2024		5.00	Hour
	Robert	Samuel	Barker	00000143	6/15/2024	6/30/2024		10.00	Hour
	Beverlee	Helen	Rideout	00000145	6/15/2024	6/30/2024		5.00	Hour
	Susan	Barbara	Smith	00000156	12/1/2023	9/30/2024		5.00	Hour
	Beverlee	Helen	Rideout	00000164	12/1/2023	9/30/2024		5.00	Hour

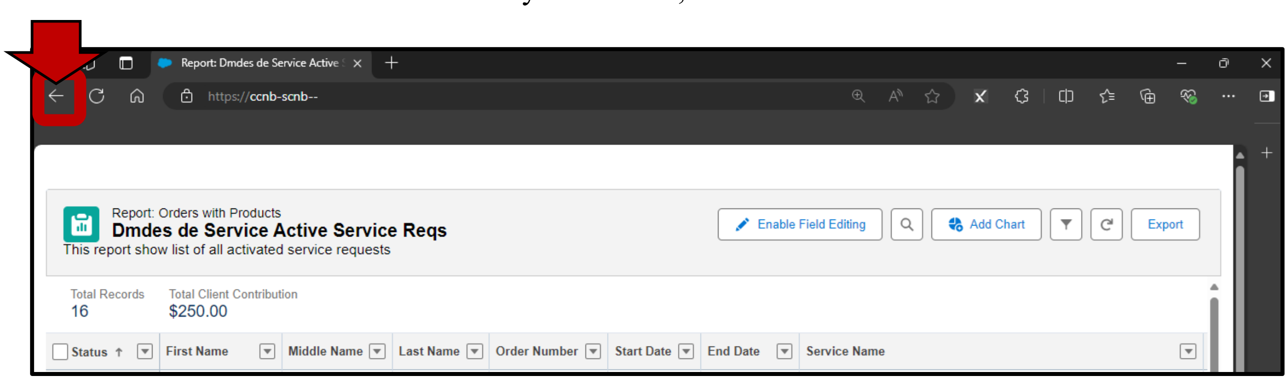
3. To add a chart to the report, click the **Add Chart** button.



4. A visual representation of the report data will appear as a bar chart.



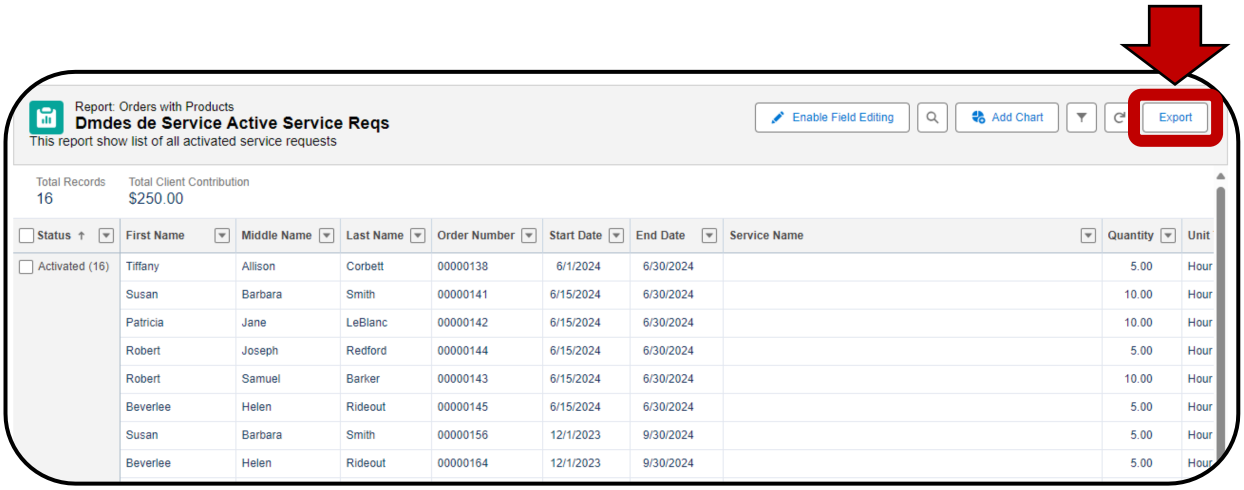
5. To return to the Service Delivery dashboard, click the **Go Back** arrow on the browser.



Export Reports

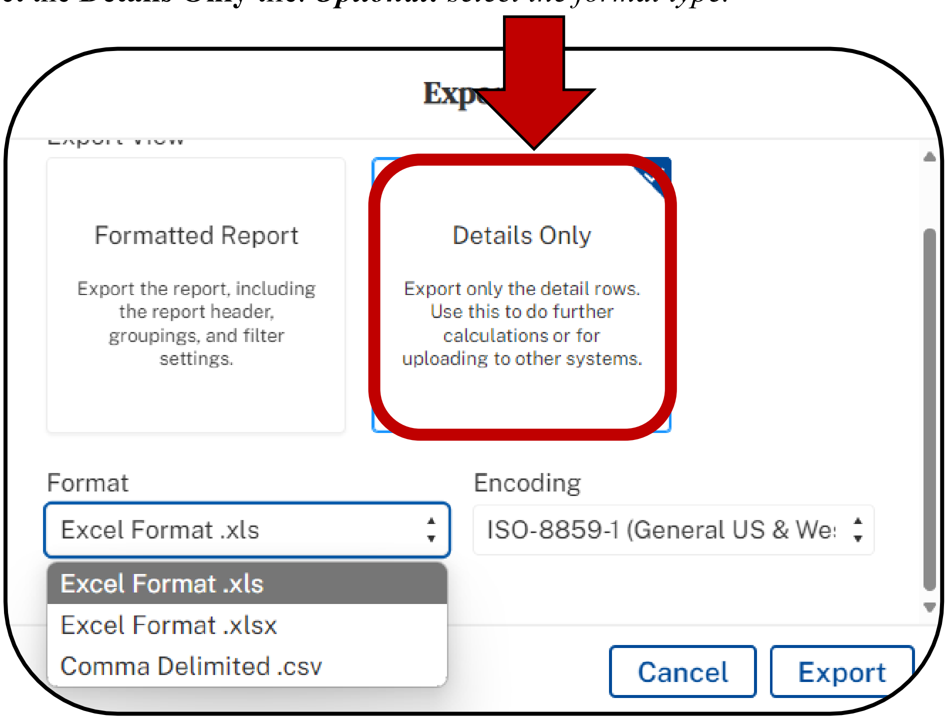
In any of the reports found on the Service Delivery Dashboard, the Care Coordinator has the ability to export when viewing all the details of a report type. It is recommended that the file be exported as an XLSX, XLS, or CSV file (see below).

1. From the report details window, select the **Export** button.



2. The **Export** popup window is displayed.

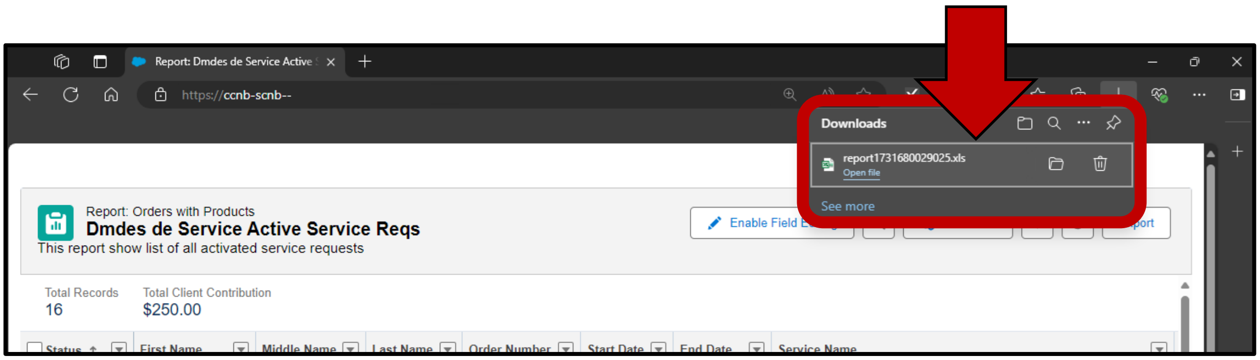
3. Select the **Details Only** tile. ***Optional:*** *select the format type.*



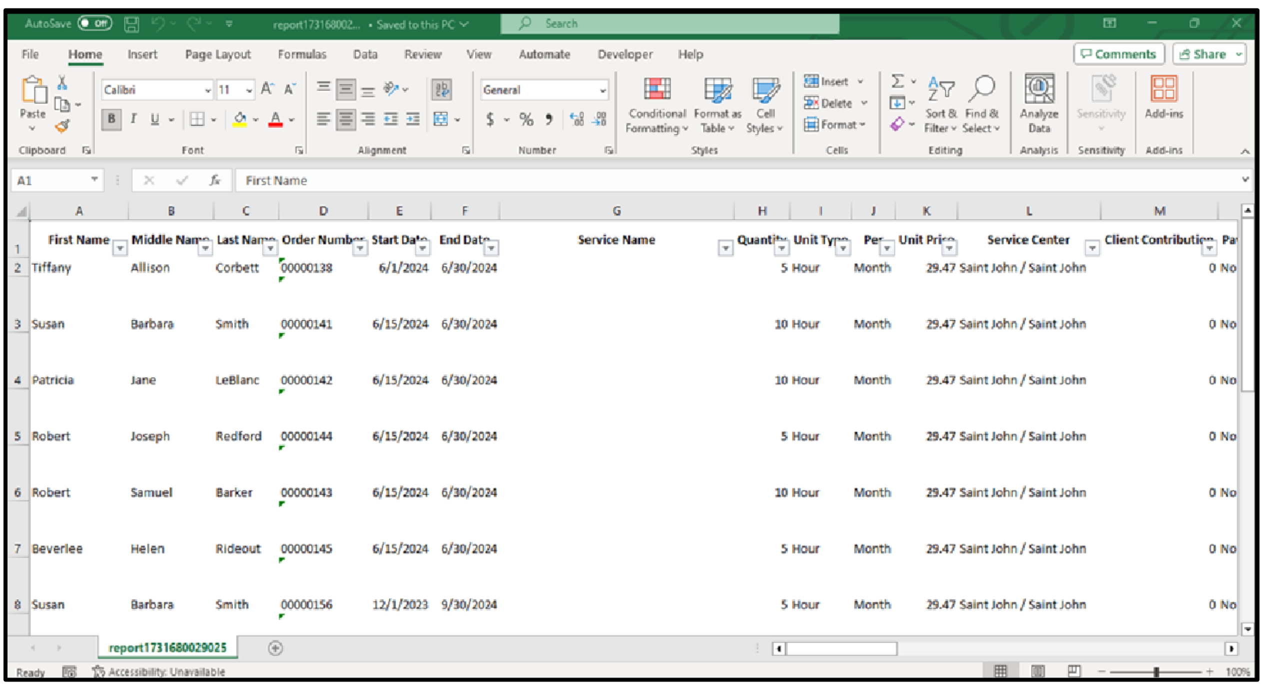
4. Once the **Details** and **Format** are select, click the **Export** button.

5. The page Reloads and the **Downloads** window is displayed with the exported report.

6. Click the report to open the Excel spreadsheet.

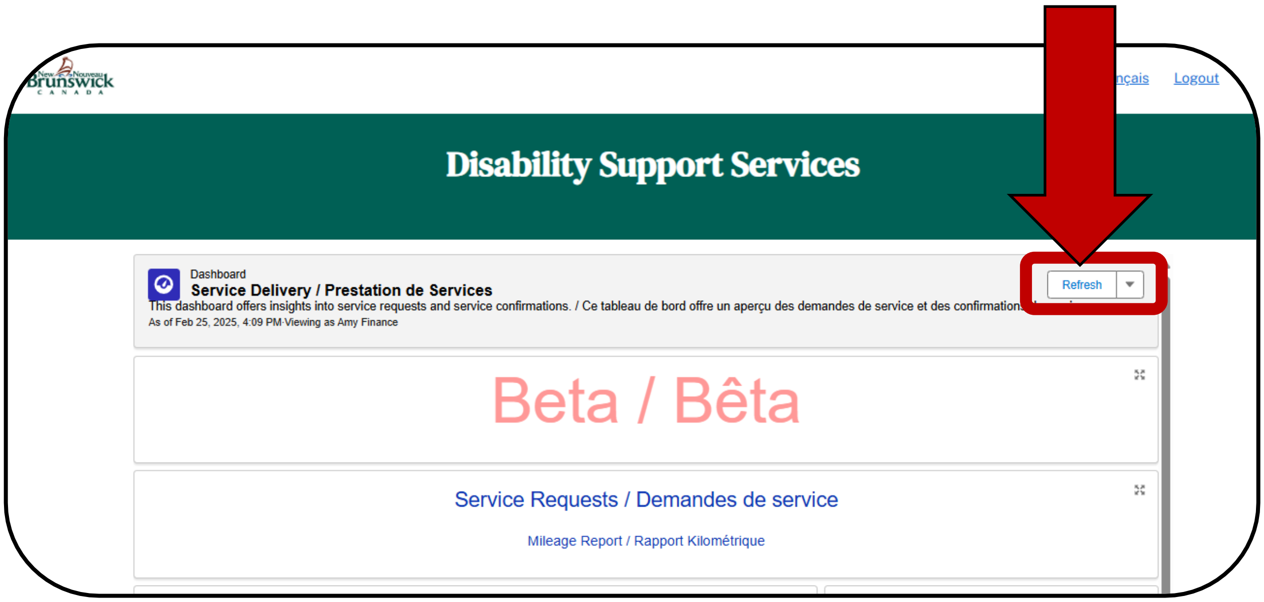


7. The Report is displayed and can now be printed or saved.



Refresh Data

If newly captured information is not displayed on the dashboard, or if the user wants to ensure that the most updated version is displayed, clicking the **Refresh** button reload and update all information displayed on the dashboard. This button must be used as the refresh button on the browser will not update the information.



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
Validations for Service Confirmations (SC)	• Negative value is entered for a field

Type	State Reason (Error)	Defined
Validations for Service Confirmation Item (SCI)	Service request is still active.	Service Request has not been cancelled since the Service Confirmation was created
Validations for Service Confirmation Item (SCI)	Service Request is no longer active in the service period submitted.	**Scenario: since downloading - the Order has been terminated.** • 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.
Validations for Service Confirmation Item (SCI)	Client Contribution: 1. Client Contribution must be equal or less than Client Contribution recorded on the Order.	**IF** the Basic Cost on the Service Confirmation Item is less than the 'remaining client contribution of the month', **THEN** Client Contribution Amount entered should be equal to the 'Basic Cost on Service Confirmation Item'.
Validations for Service Confirmation Item (SCI)	Client Contribution: 2. Client Contribution is equal to Basic Cost	**IF** the Basic Cost on the Service Confirmation Item is less than the 'remaining client contribution of the month', **THEN** Client Contribution Amount entered should be equal to the 'remaining client contribution of the month'.

Validations for Service Confirmation Item (SCI)	Basic Cost must be less than maximum monthly basic cost minus the already submitted basic cost	**IF** the Basic Cost on the Service Confirmation Item is not 0, **THEN** if must be less than the Monthly Max Basic cost amount minus the already submitted basic cost.
Validations for Service Confirmation Item (SCI)	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 Item (SCI)	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.
Validations for Service Confirmation Item (SCI)	Negative value is entered for a field	N/A

Less likely to encounter the following errors.

Type	State Reason (Error)	Defined
Validations for Service Confirmation Item (SCI)	Kilometer has a mismatch on field type.	Kilometer Units must be entered as whole numbers (e.g., 150). The system will **not** validate decimal numbers (e.g., 150.26).
Validations for Service Confirmation Item (SCI)	Other Costs must be equal or less than maximum monthly Other Costs minus already submitted Other Costs Other Costs could be • Other Cost (transportation-other) • Other Cost (sundry) • Other Cost (meals) • Other Cost (admin fees) • Other Cost (parking) • Other Cost (recreation)	Example: Monthly Max Other Costs amount = $300 • 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
Validations for Service Confirmation Item (SCI)	"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 Item (SCI)	"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 Item (SCI)	"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 Item (SCI)	No value entered in the Service Confirmation Item	**IF** Service Confirmation is being updated **AND** the user inputs a '0' or blank for **all** following fields in an SCI: • Units (Basic Cost) • Kilometer Units • Other Cost (Transportation – Other) • Other Cost (admin fees) • Other Cost (meals) • Other Cost (recreation) • Other Cost (sundry) • Other Cost (parking) **THEN** Service Confirmation Item will fail validation

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 By**	**Date**	**Changes**
0.1	Amy Michaud	04/30/2025	First Draft
0.2	Amy Michaud	05/26/2025	Reformatted / updated rationales and steps