Finances & CommunityCareNB

SERVICE PROVIDERS



Community Care NB Soins Communautaires

USER GUIDE

Version 0.2

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CONFIDENTIAL STATEMENT

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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 <u>changes to services</u>.
- 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 <u>Appendix</u> 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: <u>Submit Small Batch of Services (Manual Entry)</u>

- 1. From the <u>Service Confirmation Items</u> 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: <u>Download Service Confirmation Items & Provide Required</u> <u>Information</u>

- 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: <u>Upload Service Confirmation Items (CSV)</u>

- 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: <u>Failed Validations</u>).

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

Step 5: <u>Failed Validation</u>

- 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: <u>Errors & Failed Validation List</u> 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: <u>Errors & Failed Validations</u> 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: <u>Submit Service Confirmations for Payment</u>

- 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: <u>Submitting Services that Failed Validation</u>

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.

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	Disability Support Services Partner Portal	
	Log in to your account to get started	
	▲ Username	
	â Password	
	Log in	
	Forgot your 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.

Version 0.7



Service Confirmations Page Overview

	Select begin service	this but creating e confirma	tton to a new tion.						
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	Crea My S	ICE CONF RMATIO	irmations				U tl a	Use refronat the redispla	esh to ensure latest changes ayed.
	12 items •	Sorted by Service Confi	Vendor Confirma	vice confirmations · Update	d a few seconds ago Service P	Total \vee	State	√ St ∨	C
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	2	SC-00000007	1234	2024-07-01	2024-07-01	\$0.00	Failed Validatio	•	
	З	SC-0000008	!2345	2024-06-18	2024-06-29	\$0.00	Draft	÷.	
	Select open a Confir	a hyper and view mation det	link to Service tails.			Thes state Serv	se column and statu vice Confin	s display s (<i>icons</i>) rmation.	y the of a



How to Create Service Confirmations

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

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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.

/ly s	Service Requests					
1 o	f1item • 0 items selected				Q Search this list	t
	Order Summary Nu \lor	Service Name ~	Account Name ~	Order	Summary Start	Order Summary End D
	OS-0001698	Home Support/Personal Care - Soutien a domicile/Soins personnels	MELISSA RACHYL	Apr 1, 2	2025	Jul 31, 2025

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.

	Create Service Confirmations	
Vendor Confirmation Number		
		Next

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

I2 items •	Sorted by State • Filtered by	All service confirmations • Updated	2 minutes ago				
	Service Confi \vee	Vendor Confirmatio \vee	Service Per \vee	Service Per \vee	Total C 🗸	State ↑ ∨	Status 🗸
1	SC-0000008	!2345	2024-06-18	2024-06-29	\$0.00	Draft	ंग
2	SC-00000014	AB-9999	2024-07-01	2024-07-21	\$0.00	Draft	\diamond
3	SC-0000015	AB-8888	2024-07-01	2024-07-22	\$0.00	Draft	\diamond
4	SC-0000007	1234	2024-07-01	2024-07-01	\$0.00	Failed Validation	U

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.

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		Disab	ility Sup	oport Se	rvices			
SERVICE C	TIONS							
Create Se	onfirm	ations						
My Serv	nfirr	nations						C
12 items - Sorte	vice confi V	Vendor Confirmatio ~	Service Per V	Service Per \vee	Total C 🗸	State ↑ ~	Status ∨	
1 SC-	8000000	!2345	2024-06-18	2024-06-29	\$0.00	Draft	$\dot{\cdot}$	
2 SC-	00000014	AB-9999	2024-07-01	2024-07-21	\$0.00	Draft	\diamond	
3 SC-	00000015	AB-8888	2024-07-01	2024-07-22	\$0.00	Draft	$\langle \cdot \rangle$	

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

	tion	
State	State Reason	
Draft		
Service Period Start Date	Service Period End Date	
2024-06-18	2024-06-29	
Service Confirmation ID	Charged Service Center	
SC-0000008	Saint John / Saint John	
Vendor Confirmation Number	Service Provider	
12345	Southwest Home Services	
HST GST ID	Tax Indicator	
	al contract of the second s	
Total Confirmation Amount	Tax Amount	
00.03	\$0.00	

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



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

 Service Confirmation Informa 	ition	
State Draft	State Reason	
Service Period Start Date 2024-06-18	Service Period End Date 2024-06-29	
Service Confirmation ID SC-00000008	Charged Service Center	
Vendor Confirmation Number 12345	Service Provider Southwest Home Services	
HST GST ID	Tax Indicator	
Total Confirmation Amount	Tax Amount	
\$0.00	\$0.00	

- 5. Enter the HST GST ID (*if applicable*) in the corresponding field.
- 6. Select the applicable **Tax Indicator** from the dropdown menu.

runswick			Franç
	Second ponfirmation ID SC-1018 Visit of firmation Number	Charged Service Center Saint John / Saint John Service Provider Southwest Home Services	
	HST GST ID	Tax Indicator	
	Total Confirmation Amount \$0.00 This field is calculated upon save	Ţ ✓None F-Full	
	 Service Confirmation Status History Validated Date 	N - No Tax O - Out of Province	
	Confirmed for Payment Date	P-Partial	
	Cancel	Save	

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 <u>Submitting for Large Batch of Services</u> (<u>CSV</u>) to learn more about how to complete this more efficiently.

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

2 items	Servi rma	ation Items (2)	ed a few seconds ago	,			尊 * G
	Ser. 1	🗸 Client Name 🗸	Service v	Service Name ~	Total Co 🗸	State ~	State Re ∨
1	SCI-000000	Susan Smith	00000156	Home Support/Personal Car	\$0.00	Draft	
2	SCI-00000019	Patricia LeBla	00000158	Meal Services - Services de r	\$0.00	Draft	
							View Al

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

Service Confirmation Item SCI-00000018	
Apply To Month/Year State 2024-07-01 Draft	
 Service Confirmation Item 	
State Draft	tate Reason
Service Confirmation Item ID SCI-00000018	ervice Confirmation ID
Client Name Susan Smith	ervice Request
Service Name Home Support/Personal Care - Soutien a domicile/Soins personnels	ayment Type corring
✓ Basic Cost	
Unit Type Hour	dte \$29.47



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

This field is calculated upon save		
Service Name Home Support/Personal Care - Soutien a domicile/Soins personnels This field is calculated upon save	Payment Type Recurring	
✓ Basic Cost		
Unit Type	Rate	
Hour	\$29.47	
Units	Basic Cost	
	\$0.00 This field is calculated upon save	
✓ Kilometer Cost		
Kilometre Units	Kilometre Rate	
	Kilometre Cost	
	\$0.00	
	This field is calculated upon save	

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**.

This field is calculated upon save	
Service Name Home Support/Personal Care-Soutien a domicile/Soins personnels This field is calculated upon save	Payment Type Recurring
✓ Basic Cost	
Unit Type	Rate
Hour	\$29.47
Units 5	Basic Cost
2.00	\$0.00 This field is calculated upon save
✓ Kilometer Cost	
Kilometre Units	Kilometre Rate
	KIIOMETRE COST
	This field is calculated upon save
• Other Costs	

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: <u>How to Create a Service Confirmation</u>)

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.

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Service Confirmation Item Id Product Name Service Req	est & Client Name No. Of Units Unit Type Rate Kilometres Kilometre Rate Other Cost (transp	Other Cost (m Other Cost (sur Other Cost (admir Other Co Other Co Client Contribution Stat Holiday Units
2 SCI-00000010 Home Support/Personal Care - Sc	171 Tiffany Allison Corbett 3 Hour 29.5	88.41
3		

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

AutoSave 💽 🗗 🥬 ▾ 🤍 ऱ マ serviceConfirmationItems	(12) V Search		Michaud, Amy (S	(SD/DS) 🤹 🖻	- <u> </u>
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A B	C D	E F G	н	J	K
1 Service Confirmation Item Id Product Name	Service Request Id Client Name	No. Of Units Unit Type Rate Kilom	etres Kilometre Rate O	other Cost (transpo C	Other Cost (meOther
2 SCI-00000010 Home Support/Personal Care - Sout	i 171 Tiffany Allison Corbett	3 Hour 29.47			

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.

Save As				×
← → ~ ↑	> Doc > Service Confir	~ C		firmations 🔎
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	Name		Date modified	Туре
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🔛 Documents 🖈				
🛓 Downloads 🖈				
🔀 Pictures 📌	_			
File name: SC-0	0000032 - April 1-5			~
Save as type: CSV (Comma delimited)			<u> </u>
Authors:				
		Tools	▼ Save	Cancel



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.

💽 Open				
← → ~ ↑ □	Documents Service Confirmations			
Organize 👻 New folder		🗉 + 🔳 🏮 🟪		
A Home	Name ^ Date motified Time Size			Françaie
🔀 Gallery	SC-00000032 - April 1-5 4/17/2024 12:00 PM Microsoft Excel C 5 K8			Liunyara
Desktop 🖈		es	3	
Downloads				
🔀 Pictures 📌				
📀 Music 🛛 🖈				
🖼 Windows (C:) 📌				
🔜 Videos 🛛 🖈				
> This PC			Submit	
> 💱 Network		ems	Service Confirmation Items	
			✓ Submit	
File ou	me [\$^_00000022.devil 1.5			
	Upload:	from mobile Open 🔻 Cancel		
	 Service Confirmation Information 			
	State	Reason		

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".

SC-0000008				Saint John / Sa	aint John		
Vendor Confirmation	Number			Service Pro Southwest Ho	vider me Services		
HST GST ID			<i>I</i>	Tax Indicato	or		1
Total Confirmation A \$0.00	mount			Tax Amount \$0.00	t		
✓ Service Con Validated Date	firmation St	atus Histo	ry	Submitted [Date		
Confirmed for Payme	ent Date			Processed [Date		
							\$ ~ C'
Service Confirmat	tion Items (1) firmation Item ID • Updat	ed a few seconds ago)				



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.

Brunswick					Er	rançı
		Disability Suppor		ervices		
	Service Confirmation SC-00000008	tart Date Service Period End Date				
	Download Service Confirmation Items	Upload Service Confirmation Items		firmation Items	Submit Service Confirmation Items	
	ය Download	Upload Or drop Files Files	Valid	ate	✓ Submit	

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

SC-0000008			Saint John / Saint Jo	hn		
Vendor Confirmation Number 12345			Service Provider Southwest Home Se	rvices		
HST GST ID		1	Tax Indicator N-No Tax			ji.
Total Confirmation Amount \$0.00			Tax Amount \$0.00			
 Service Confirmatio 	n Status Histo	ory				
Validated Date 2024-09-20			Submitted Date			
Confirmed for Payment Date			Processed Date			
Service Confirmation Items (1) 1 item • Sorted by Service Confirmation Item ID	 Updated a few seconds ag 	2			tột ~	C

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.

SC-0000008				Saint John / Saint Jo	hn			
Vendor Confirmatio	n Number			Service Provider	r			
HST GST ID			,er	Tax Indicator	ervices			
Total Confirmation \$0.00	Amount			Tax Amount \$0.00				
✓ Service Co	nfirmation S	tatus Histo	ory					
Validated Date 2024-09-20				Submitted Date				
Confirmed for Payr	nent Date			Processed Date				
							_	
Service Confirm	ation Items (1) Infirmation Item ID • Upda	ted a few seconds ago)				ŵ -	
					THE	01.11	01.11.0	

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

									<u>Français</u>
		Di	sabili	ty Support	Serv	ice			
Service Service 1item・Sc	Confirmations = Confirmation It rted by Service Conf	> SC-00000007 ems irmation Item ID • Updated a fe	ew seconds ago				(C T	
1	Service ↑ ~	Client Name ~	Servi ~	Service Name ~	Tot ∨	State ~	State Reason Holiday Units is not a	~ I	
S	ervice iervice item - So	iervice Confirmations : iervice Confirmation It item · Sorted by Service Conf Service ↑ ~ 1 SCI-00000009	ervice Confirmations > SC-00000007 iervice Confirmation Items item · Sorted by Service Confirmation Item ID · Updated a fo Service ↑ ✓ Client Name ✓ 1 SCI-0000009 Smith Tester Patricia	iervice Confirmations > SC-00000007 iervice Confirmation Items item + Sorted by Service Confirmation Item ID - Updated a few seconds ago Service ↑ Client Name Servi 1 SCI-0000009 Smith Tester Patricia	Disability Support ervice Confirmations > SC-00000007 ervice Confirmation Items item + Sorted by Service Confirmation Item ID - Updated a few seconds ago Service 1 Service 2 Service Name Service Name	Disability Support Serv ervice Confirmations > SC-00000007 ervice Confirmation Items item + Sorted by Service Confirmation Item ID - Updated a few seconds ago Service Confirmation Item ID - Updated a few seconds ago Service Name < Tot	Disability Support Service iervice Confirmations > SC-00000007 iervice Confirmation Item ID- Updated a few seconds ago Service Confirmation Item ID- Updated a few seconds ago Service Confirmation Item ID- Updated a few seconds ago Service Name Service Name State 1 Service Name Tot Service Name Tot Service Name Tot State Service Name Tot State Service Name Tot State Dispont/Perso State Dispont/Perso State	Disability Support Service iervice Confirmations > SC-00000007 iervice Confirmation Items item + Sorted by Service Confirmation Item ID - Updated a few seconds ago Service ↑ Service Name Tot State Reason SetUpport/Perso SetUpport/Perso SetUpport/Perso SetUpport/Perso SetUpport / Perso SetUpport / Perso SetUpport / Perso	Disability Support Service iervice Confirmations > SC-00000007 iervice Confirmation Item Ib Updated a few seconds ago Service 1 Client Name Service 1 Client Name Service 1 State Reason 1 SCI-00000009 Smith Tester Patricia 0000199 Home Support/Perso S810.43 Failed Validation Holiday Units is not al

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.

 From the Service Confirmation Items list (re: <u>step 3: view all</u>), select the Failed Validation SC item number.

Brunswick								França
		Dis	sabili	ty Support	Serv	rices		
	Service Co Service Co 1 item • Serted	ions > SC-00000007 ion Items a Confirmation Item ID • Updated a fee	w seconds ago				G	
	1 SCI-0000	Image: The second se	Servi ∨ 00000199	Service Name ~ Home Support/Perso	Tot ∨ \$810.43	State ~ Failed Validation	State Reason ~ Holiday Units is not al	

2. Service Confirmation Item details are displayed.

runswick				Fran
		Disability S	upport Services	
	Service Confirmation Item			
	Apply To Month/Year 2024-07-01	State Failed Validation		
	✓ Service Confirm	nation Item		
	State Failed Validation		State Reason Holiday Units is not allowed for this service	
	Service Confirmation Item SCI-00000009	۱D	Service Confirmation ID SC-0000007	
`	Client Name		Service Request	
	Service Name		Payment Type	



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 <u>Correcting & Resubmitting Services that Failed Validation</u> 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 <u>Log a Change Request</u>. 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 (<u>communitycaresupports_soinscommunautaires@gnb.ca</u>) 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**.

Version 0.7



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.

Brunswick		França
	Disability Support Services	
	Service Confirmation Sc.000000000000000000000000000000000000	
	Download Upload Validate Service Confirmation Items Validate Service Confirmation Items Service Confirmation It	firmation Items

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**.

Service $\uparrow \lor$	Client Name \lor	Service \lor	Service Name ~	Total Co 🗸	State ~	State Re \vee
SCI-00000010	Tiffany Corb	00000171	Home Support/Personal Care	\$0.00	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).

~	Serv Conf	irmation Status	s History			
Va 5/9	0/2024			Submitted Date		
Co	onfirmed Paymen	nt Date		Processed Date		
Č	Service nfirmatio	on Items (5)			z,	ģ. C
5 item	Service of firmatic ns • Update ninute ago	on Items (5)			ž	¢. G
5 item	Service nfirmation	on Items (5)	\vee Service R \vee	Service Name ~	× State	¢+ C
5 item	Service on firmatic is Update injute ago Ser on v SCI-00000165	 Client Name Peter Parker 	 ✓ Service R ✓ 00000414 	Service Name ~	X State Failed Validation	¢r C
S item	Service offirmatic ns · Update unute ago Ser office office SCI-00000165	on Items (5) Client Name Peter Parker Isabelle Boulay	 ✓ Service R ✓ 00000414 00000450 	Service Name ~ DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel	State Failed Validation Failed Validation	\$ ▼ C
5 item 1 2 3	Service of firmatic s-Update inute ago Service of an according Service of a service of a serv	Client Name Peter Parker Isabelle Boulay Michael Patterson	 Service R > 00000414 00000450 00000494 	Service Name ~ DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel	State Failed Validation Failed Validation Validated	¢. G
5 item 1 2 3 4	Service of firmatic her Update vinute ago Service of the service	Client Name Peter Parker Isabelle Boulay Michael Patterson Angela Steeves	 ✓ Service R ✓ 00000414 00000450 00000494 00000612 	Service Name DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel DEPRECATED Home Support/Personal	F State Failed Validation Failed Validation Validated Validated	\$ C

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

inswick	Franca
Disability Su	ppo Services
Scr-to0000165	
✓ Service Confirmation Item	—
State Failed Validation	State Reason Client Contribution must be equal to Basic Cost
Service Confirmation Item ID	Service Confirmation ID
SCI-00000165 Client Name Peter Parker	SC-0000062 Service Request 00000414
Service Name DEPRECATED Meals On Wheels/Wheels To Meals - Livrai.repas domic/transp. pour se procurer un repas	Payment Type Recurring



- 3. Make the correction(s) (re: <u>Errors & Failed Validations</u> list above and <u>Capture/Modify</u> <u>Service Confirmation Items</u> 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.

Brunswick		Disability Su	pport Services		França
	Service Confirmation SC-00000062				
	Download Service Confirmation Items	Upload Service Confirmation Items Upload t Upload files	Validate Service Confirmation Items Validate	Submit Service Confirmation Items Submit	

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

Service Con $$	Client Name	\sim	Service R \vee	Service Name	State	
SCI-00000165	Peter Parker		00000414	DEPRECATED Meals On Wheels/Wheel	Validated	
SCI-00000166	Isabelle Boulay		00000450	DEPRECATED Meals On Wheels/Wheel	Validated	
SCI-00000167	Michael Patterson		00000494	DEPRECATED Meals On Wheels/Wheel	Validated	
SCI-00000168	Angela Steeves		00000612	DEPRECATED Home Support/Personal	Validated	
SCI-00000169	Joshua Sommers		00000624	DEPRECATED Meals On Wheels/Wheel	Validated	

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

		Disability Sup	oport Services		
C	Service Confirmation SC-00000062				
Do Se	ownload ervice Confirmation Items 2. Download	Upload Service Confirmation Items Upload C Gr drop Files	Validate Service Confirmation Items Validate	Submit Service Confirmation Items Submit	

8. Select Confirm.

I.

Select 'CONFIRM' to submit only valid service confirmation items. Or	r 'CANCEL' to return	
	✓ Confirm	🕹 Cancel



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

Service Con $$	Client Name	\sim	Service R \lor	Service Name	State	
SCI-00000165	Peter Parker		00000414	DEPRECATED Meals On Wheels/Wheel	Submitted	
SCI-00000166	Isabelle Boulay		00000450	DEPRECATED Meals On Wheels/Wheel	Submitted	
SCI-00000167	Michael Patterson		00000494	DEPRECATED Meals On Wheels/Wheel	Submitted	
SCI-00000168	Angela Steeves		00000612	DEPRECATED Home Support/Personal	Submitted	
SCI-00000169	Joshua Sommers		00000624	DEPRECATED Meals On Wheels/Wheel	Submitted	



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.

STURSWICK	Disabil	ity Support	t Services		Fran
SERVICE CO Create Se My Servi 5 items - Sorted b	e Confirmations Confirmations ice Confirmation D - Filtered by All service confirm	ations • Updated a few seconds ago			ď
Ser	onfirmati \downarrow \checkmark Vendor Confir \checkmark	Service Period St $ \smallsetminus $	Service Period En \vee	State ~	
1 SC-0000	45678	3/11/2024	3/15/2024	Failed Validation	
2 SC-0000	67891	4/22/2024	4/26/2024	Draft	
3 SC-0000	89123	4/1/2024	4/12/2024	Validated	
4 SC-0000	23456	4/8/2024	4/12/2024	Submitted	
5 SC-0000	12345	3/1/2024	3/31/2024	Validated	

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

	Disability Su	pport Services	
Service Confirmation SC-00000062			
Download Service Confirmation Items	Upload Service Confirmation Items	Validate Service Confirmation Items	Submit Service Confirmation Items
ය Download	Let the second se	✓ Validate	✓ Submit
	· · · · · · · · · · · · · · · · · · ·		-1



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

Select (CONFIDM) to submit only valid convice confirmation items. Or (CANCEL) to return		
Select CONFIRM to submit only valid service confirmation items. Or CANCEL to retur	rn	
	✓ Confirm	🕰 Cancel

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**.

\sim	Service Confi	rmation Status	History			
Va 5/9	lidated Date			Submitted Date		
Co	nfirmed for Payment	t Date		Processed Date		
8	Service Confirmation	n Items (5)				\$ ~ C
5 item	s • Updated a few seconds a	ago				
	Service Con \lor	Client Name	\checkmark Service R \checkmark	Service Name	∽ State	~
1	Service Con ~ SCI-00000165	Client Name Peter Parker	 ✓ Service R ✓ 00000414 	Service Name DEPRECATED Meals On Wheels/Wheel	State	×
1	Service Con ~ SCI-00000165 SCI-00000166	Client Name Peter Parker Isabelle Boulay	 ✓ Service R ✓ 00000414 00000450 	Service Name DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel	 State Submitted Failed Validation 	,
1 2 3	Service Con SCI-00000165 SCI-00000166 SCI-00000167	Client Name Peter Parker Isabelle Boulay Michael Patterson	 Service R > 00000414 00000450 00000494 	Service Name DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel	 State Submitted Failed Validation Submitted 	
1 2 3 4	Service Con SCI-00000165 SCI-00000166 SCI-00000167 SCI-00000168	Client Name Peter Parker Isabelle Boulay Michael Patterson Angela Steeves	 Service R > 00000414 00000450 00000494 00000612 	Service Name DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel DEPRECATED Meals On Wheels/Wheel DEPRECATED Home Support/Personal	State Submitted Failed Validation Submitted 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 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.

	Confirmed for Payment Date	Processed Date	
	Service Confirmation Items (1) 1 item - Sorted by Total Confirmation Line Cost - Updated a few seconds ago	0	\$\$ * C
	Service Con Client Name Service Netlissa RACHYL 000	vice Req > Service Name > 004065 Home Support/Personal Care-Soutien >	Tota ↑ ∨ ! \$0.00 I
			View All
		•	
_		•	
wick			<u>Français</u> Logou
wick	Disability	Support Services	<u>Français Logo</u> ,
	Disability S	Support Services	Français Logou
WICK	Disability S	Support Services	Français Logou
Wick	Disability S Disability S Service Confirmation Item SCI-00005569 Apply To Month/Year 4/1/2025 State Draft	Support Services	Français Logou
	Disability S Disability S Sci-00005569 Apply To Month/Year 4/1/2025 State Draft Sci-Service Confirmation Item	Support Services	Français Logou
	Service Confirmation Item Sc1-00005569 Apply To Month/Year State Jraft • Service Confirmation Item State Dest	Support Services	Français Logou
	Service Confirmation Item SCI-00005569 State Draft Apply To Month/Year 4/1/2025 State Draft • Service Confirmation Item State Draft State Draft	Support Services	Français Logou
Windowski Window	Service Confirmation Item SC1-00005569 Apply To Month/Year State 4/1/2025 Draft State Draft State Draft State Draft State Draft Service Confirmation Item ID Sc1-0005569 Client Name Client Name	Support Services	Français Logou
Winster	Service Confirmation Item SCI-00005569 State Draft Apply To Month/Year 4/1/2025 State Draft • Service Confirmation Item State Draft State Draft State Draft Service Confirmation Item Item Sci-00005569 Client Name MELISSA RACHYL Service Confirmation Item	Support Services	Français Logou
	Service Confirmation Item SCI-00005569 Apply To Month/Year State Draft Service Confirmation Item State Draft Service Confirmation Item ID Scr-00005569 Client Name MELISSA RACHYL Service Name	Support Services	Français Logou



2. Select the Log a Change Request pushbutton.

Brunswick			nçais Logout
		Disability Support Services	
	Service Request 00000217 Status Activated	Name Manoj Tester	Log a Change Request Assigned SD Worker
	Demographic I First Name Manoj	nformation Middle Name	Manoj Reddy-Bolledla
	Last Name Tester		status Status = Activated

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

DIS9DIIITY SUDDOTT SERVICES Service Report Create					
Category 0					
None		•			
Туре 🛛					
Available	Chosen				
*Description ()					
	1	Next			

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	
ategory 0		
Adjust Service		
Гуре 🔍		
/ailable	Chosen	
Person Requesting Decrease Service		
Agency Requesting Decrease Service	•	
Person Requesting Increase Service		
Description ()		
		Next
- Deakesk lakenesking		
	Pause Service	
Catagory 0		
Pause Service		
	Chosen	
Parage Degulating David Service	> Choice	
Person Requesting Pause Service		
Agency Requesting Pause Service	٠	
*Description 0		
Date ♥ *Date *Time		
-		
		Next
	End Service	Next
Sategory O	End Service	Next
Sategory O End Service	End Service	Next
ategory End Service Type	End Service	Next
Tategory End Service Type Vailable	End Service	Next
Tategory End Service Type Vailable Person Requesting End Service	End Service	Next
ategory • End Service Type • vailable Person Requesting End Service	End Service	Next
ategory • End Service Type • vailable Person Requesting End Service Agency Requesting End Service	End Service	Next
End Service Type Vailable Person Requesting End Service Agency Requesting End Service	End Service	Next
End Service Type vailable Person Requesting End Service Agency Requesting End Service	End Service	Next
Category End Service Type Yvailable Person Requesting End Service Agency Requesting End Service Description	End Service	Next
Category End Service Type Wailable Person Requesting End Service Agency Requesting End Service Description	End Service	Next
End Service Type • wailable Person Requesting End Service Agency Requesting End Service	Chosen	Next
Eategory End Service Type Vailable Person Requesting End Service Agency Requesting End Service Description Description	Chosen	
Category End Service Type Vailable Person Requesting End Service Agency Requesting End Service Description Description Time Time Time	End Service	
Category Category End Service Type Wailable Person Requesting End Service Agency Requesting End Service Description Description Time Time Time Time Time Time Time Time	End Service	
ategory End Service Type Vailable Person Requesting End Service Agency Requesting End Service Description Time Time Time Time Time Time Time Time	End Service	

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.

	Service Report Create						
Categ							
Adju							
Туре							
vaila		Chosen					
Pers Requesting Decrease Service	î,	Person Requesting Increase Service					
Agei Requesting Decrease Service	-						
Aga equesting Increase Service	ļ						
Description 0							
Please describe the change in detail and the reason for	the change request.						
			Next				

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

Service Report Create	Assigned SI
Thank you, the change request occurring at 2024-04-24, 9:56 a.m. related to Isabelle Boulay has been recorded.	
	Finish



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.

Construction C	ah 💌
Beta / Bêta	26
Service Requests / Demandes de service Mileage Report / Rapport Kilométrique	Ħ
New Service Request 26 Active Service Requests 26 Demandes do services Service Requests 26 Demandes do service 26 Demandes do service 26 Demandes do service 2	56
December 2024. Meal Services - Services de repas	
January 2025 Mual Services - Services de repais	
Expiring Service Requests Demandes de service à expiration Sum of Client Conhibution Sum of Client Conhibution	56
20 32.0 540 540 540 540 540 540 540 540 540 54	

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

Report: 0 Dmde: This report show	Orders with Products s de Service A v list of all activated	ctive Service service requests	Reqs				Enable Field Editing	▼ (° E	xport
Total Records 16	Total Client Contributi \$250.00	on							
Status † 💌	First Name 💌	Middle Name 💌	Last Name 💌	Order Number 💌	Start Date 💌	End Date 💌	Service Name	Quantity	r 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.

Report: C Dmde: This report show	Orders with Products 5 de Service A v list of all activated	ctive Service	Reqs				Enable Field Editing	C' Ex	port
Total Records 16	Total Client Contributi \$250.00	on							
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

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.

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Report: Orders with Products Dmdes de Service Active Service Regs	Enable Field Editing	۹	🚯 Add (Chart	• C	Export	7
Report: Orders with Products Dmdes de Service Active Service Reqs This report show list of all activated service requests	🖍 Enable Field Editing	Q	🚓 Add (Chart	▼ C'	Export	
Report: Orders with Products Dmdes de Service Active Service Reqs This report show list of all activated service requests Total Records Total Client Contribution	Enable Field Editing) Q	to Add (Chart	• C'	Export	
Report: Orders with Products Dmdes de Service Active Service Reqs This report show list of all activated service requests Total Records Total Client Contribution 16 \$250.00	Enable Field Editing) Q	Add (Chart	• C'	Export	



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.

This report sho	es de Service A w list of all activated	Active Service d service requests	Reqs				🖍 Enable Field Editing	d Chart	C' Exp	ort
Total Records 16	Total Client Contribu \$250.00	tion								
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	Hou
	Susan	Barbara	Smith	00000141	6/15/2024	6/30/2024			10.00	Hou
	Patricia	Jane	LeBlanc	00000142	6/15/2024	6/30/2024			10.00	Hou
	Robert	Joseph	Redford	00000144	6/15/2024	6/30/2024			5.00	Hou
	Robert	Samuel	Barker	00000143	6/15/2024	6/30/2024			10.00	Но
	Beverlee	Helen	Rideout	00000145	6/15/2024	6/30/2024			5.00	Ho
	Susan	Barbara	Smith	00000156	12/1/2023	9/30/2024			5.00	Но
			Distant	00000404	40/4/0000	0/00/0004			5.00	

- 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.

👘 🔲 💌 Report: Drudes de Service Active 🛛 🗙 🕂		
← C බ ⊡ https://ccnb-scnb		G 🖌 🗞 🖻
	Downloads 🗅 🖞	
	eport1731680029025.xls	→ 🖄 +
Report: Orders with Products Dmdes de Service Active Service Reqs This report show list of all activated service requests	See more Enable Field E	port
Total Records Total Client Contribution 16 \$250.00 Statue + T Eirst Name T Middle Name T Last Name T Order Number T Start Date T E	nd Date 🕞 Service Name	

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

	AutoSave 🧿	፼ ₿%~<	, , , , ≜	report173168002.	• Saved to th	is PC 🛩	♀ Search							E	- 0	_/×/
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2	Tiffany	Allison	Corbett	00000138	6/1/2024	6/30/2024				5 Hour	Month	29.47 Saint Jo	hn / Saint Jol	hn		0 No
з	Susan	Barbara	Smith	00000141	6/15/2024	6/30/2024			1	0 Hour	Month	29.47 Saint Jo	hn / Saint Jol	'n		0 No
4	Patricia	Jane	LeBlanc	00000142	6/15/2024	6/30/2024			1	0 Hour	Month	29.47 Saint Jo	hn / Saint Jol	hn		0 No
5	Robert	Joseph	Redford	00000144	6/15/2024	6/30/2024				5 Hour	Month	29.47 Saint Jo	hn / Saint Jol	hn		0 No
6	Robert	Samuel	Barker	00000143	6/15/2024	6/30/2024			1	0 Hour	Month	29.47 Saint Jo	hn / Saint Jol	hn		0 No
7	Beverlee	Helen	Rideout	00000145	6/15/2024	6/30/2024				5 Hour	Month	29.47 Saint Jo	hn / Saint Joi	'n		0 No
8	Susan	Barbara	Smith	00000156	12/1/2023	9/30/2024				5 Hour	Month	29.47 Saint Jo	hn / Saint Jol	hn		0 No
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R	eady 🐻	🛱 Accessibility: Unav	ailable									I		J		+ 100%



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.

Brunswick		<u>nça</u> i	is Logout
	Disability Support Services		7
	Dashboard Service Delivery / Prestation de Services This dashboard offers insights into service requests and service confirmations. / Ce tableau de bord offre un aperçu des demandes de service et des confirmation. As of Feb 25, 2025, 4.09 PM-Viewing as Amy Finance	Refresh	
	Beta / Bêta	5	¢
	Service Requests / Demandes de service Mileage Report / Rapport Kilométrique	ş	



Errors & Failed Validations

Туре	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



Туре	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 <u>not</u> 0, THEN if <u>must</u> 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.

Туре	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 <u>not</u> 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 (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		

