



Rehabilitation Electronic Billing System (REBA)

Rate Contract Application

User's Manual

Version 1.0

Last Updated: March 23, 2012

Table of Contents

About this Document3

1 Overview.....4

1.1 Terms & Definitions 5

1.2 Logging into the Application 6

1.3 Understanding the Interface..... 7

 1.3.1 My Profile.....7

 1.3.2 FAQ7

 1.3.3 Dashboard.....8

 1.3.4 Referrals.....8

 1.3.5 MPRs8

 1.3.6 NOAs8

 1.3.7 Invoices8

 1.3.8 User Management8

1.4 Recovering Lost Password 8

1.5 Recovering a Locked Account 8

1.6 Contact Information..... 8

2 REBA for Supervisors9

2.1 Supervisor Dashboard..... 9

2.2 Managing Referrals 11

 2.2.1 Reviewing Referrals12

 2.2.2 Accepting and Assigning Referrals to Employment Specialists.....13

 2.2.3 Rejecting New Referrals.....15

 2.2.4 Asking for More Information on Referrals.....15

2.3 Managing Monthly Progress Reports (MPRs)..... 16

 2.3.1 Creating MPRs.....16

 2.3.2 Submitting MPRs17

 2.3.3 Reviewing and Updating Rejected MPRs21

 2.3.4 Reviewing Submitted/Saved MPRs.....21

2.4 Managing Notification of Approvals (NOAs)..... 23

2.4.1 Submitting NOAs.....23

2.4.2 Reviewing and Updating Rejected NOAs26

2.4.3 Reviewing Submitted/Saved NOAs26

2.5 Managing Invoices 27

2.5.1 Creating/Submitting Invoices28

2.5.2 Reviewing and Updating Rejected Invoices29

2.5.3 Reviewing Submitted/Saved Invoices30

2.6 User Management 31

2.6.1 Creating a New User31

2.6.2 Viewing/Modifying Existing Users32

3 REBA for Employment Specialists33

3.1 Employment Specialist’s Dashboard..... 33

3.2 Employment Specialist’s Tasks..... 34

4 REBA for Contract Managers35

4.1 Contract Manager’s Dashboard 35

Appendix A: Access Control List.....37

List of Figures.....39

About this Document

This document provides information about using REBA Rate Contract Application, which is a web-based application for supervisors, contract managers and employment specialists. The application provides a centralized portal for managing referrals, monthly progress reports, notification of approvals and invoices.

This document is intended for supervisors, employment specialists and contract managers who use REBA Rate Contract Application to manage referrals, benchmarks, monthly progress reports, and invoices.

1 Overview

REBA Rate Contract Application is a web-based application for supervisors, contract managers and employment specialists for tracking and billing on professional services provided to clients based on referrals.

For each client, a VR Counselor creates a new referral in RIMS application (which is an internal application of VR being used by VR Staff for case management activities) and sends it to a selected service provider/vendor. A notification of new referral is sent automatically to primary business email address of service provider. On receiving a new referral, Supervisor can accept the referral and assign it to an employment specialist, send back the referral for more information or reject it with a reason for rejection.



It is preferable to create a group email address as 'primary business emails address', so that multiple people can receive emails from REBA application.

Employment specialists provide professional services to their assigned referrals. Supervisors monitor each referral and submit monthly progress reports. These reports are approved by VR Counselor. Each referral has pre-defined benchmarks already associated with it. Whenever a benchmark is achieved supervisors submit Notification of Approval (NOA) which is accepted or rejected by VR Counselor. Once an NOA is approved, supervisors can generate an invoice for billing purpose. All invoices are subject to approval by Contract Managers.



REBA application is designed to handle following referrals of three different types:

- Supported Employment Services (SE)
- Employment Services (ES)
- On the Job Training Services (OJT)

1.1 Terms & Definitions

| Term | Definition |
|--|---|
| REBA | Rehabilitation Electronic Billing Application |
| RIMS | Rehabilitation Information Management System - an internal application being used by VR counselors and other stakeholders |
| MPR | Monthly Progress Report |
| NOA | Notification of Approval |
| VR/ DVR | Department of Vocational Rehabilitation |
| Service Provider/ Vendor/ Contractor | A third-party vendor registered with VR to provide services to VR Customers |
| Referral | Request for professional services such as employment services or on job training |

1.2 Logging into the Application

1. Launch your web browser, such as **Internet Explorer**.
2. Type the URL of REBA Rate Contract application provided by your system administrators in Address Bar and click **Enter**. It displays the login page.

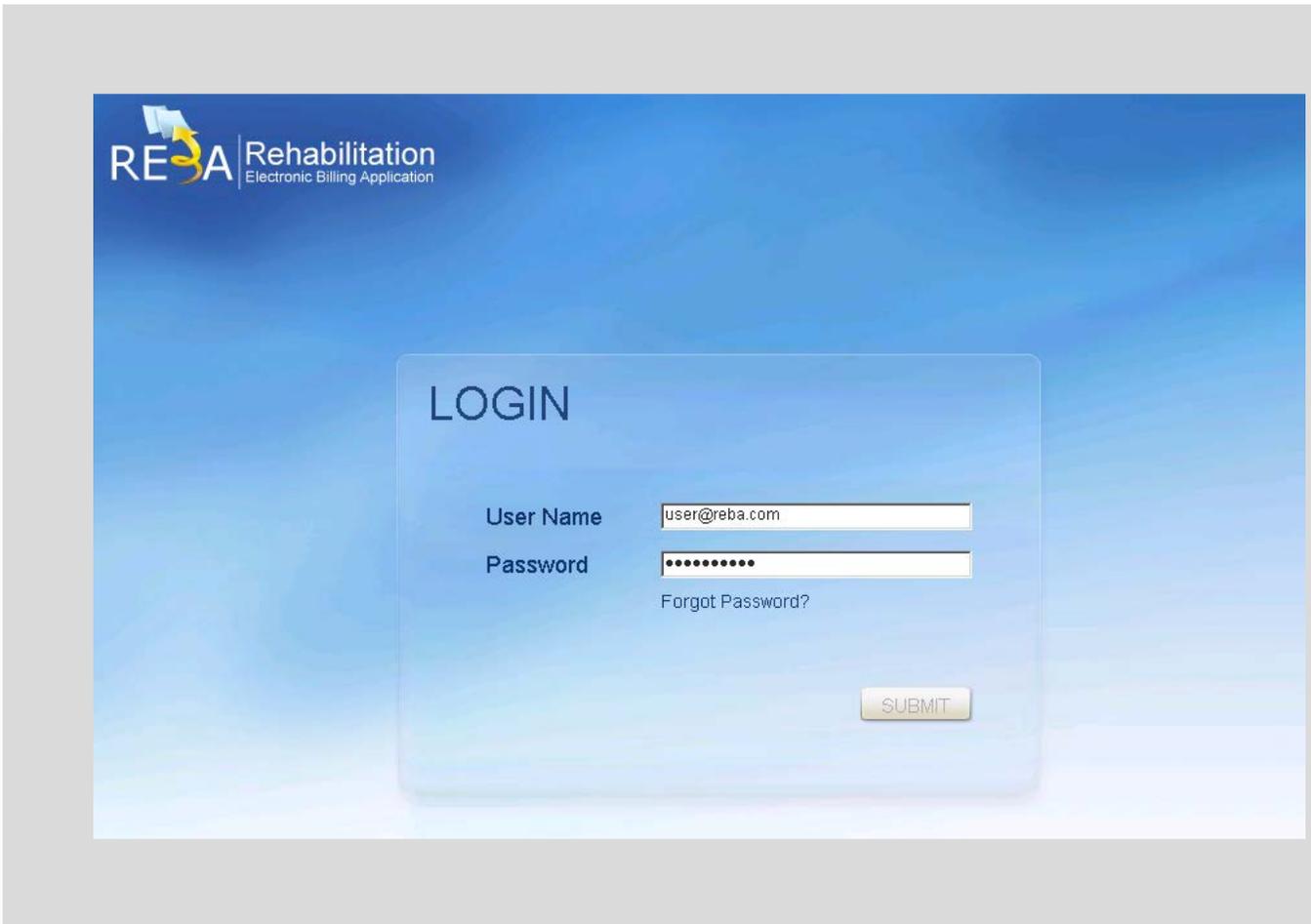


Figure 1: REBA - Login Screen

3. Type your credentials (User Name and Password).
4. Click **Submit**.

1.3 Understanding the Interface

After successful login, you would be able to view **My Profile** and **FAQ** links, and **Dashboard**, **Referrals**, **MPRs**, **NOAs**, **Invoices**, and **User Management** tabs.



Figure 2: REBA - Home Screen

1.3.1 My Profile

You can click **My Profile** link you to view your personal details as registered with REBA Rate Contract application. You can also change your password and secret question/answer.

1.3.2 FAQ

The FAQ link displays answers to frequently asked questions regarding administering REBA Rate Contract application.

1.3.3 Dashboard

Information that you view on Dashboard depends on the role and permissions assigned to you by administrator. For more information, please refer to the following sections:

- [Supervisor's Dashboard](#)
- [Employment Specialist's Dashboard](#)
- [Contract Manager's Dashboard](#)

1.3.4 Referrals

This section allows you to view new referrals, edit/modify referrals under processing, and view MPRs, NOAs and Invoices associated with each referral.

1.3.5 MPRs

This section allows you to create and submit a new Monthly Progress Report (MPR) or edit/modify existing reports and associated referrals.

1.3.6 NOAs

This section allows you to create a new Notification of Approval (NOA) or edit/modify existing NOAs.

1.3.7 Invoices

This section allows you to create new or view/modify existing invoices.

1.3.8 User Management

This section allows you to view or modify existing users of REBA Rate Contract application.

1.4 Recovering Lost Password

1. From **Login** screen, click **Forgot Password** link. It displays **Forgot Password** screen.
2. Type user ID and click **Next**.
3. Type answer to the secret question. In case of correct answer, an email will be sent to your email address with a link to password recovery screen.
4. Click the link in your email message. It displays **Reset Password** screen.
5. Set your new password.

1.5 Recovering a Locked Account

Your REBA account might get locked up because of successive failed attempts to login or other security reasons. In this case, do not try to login and wait for 15 minutes. Your account would be unlocked automatically after the specified wait time.

1.6 Contact Information

If you are having problem accessing the REBA Rate Contract Application, please contact REBA administrator at reba@vr.fldoe.org.

2 REBA for Supervisors

Supervisors in REBA Rate Contract application are responsible for managing users and referrals, submitting Monthly Progress Reports (MPRs) and Notifications of Approval (NOAs), and generating invoices.



For detailed information about rights and permissions of Supervisor, please refer to **Appendix A**.

2.1 Supervisor Dashboard

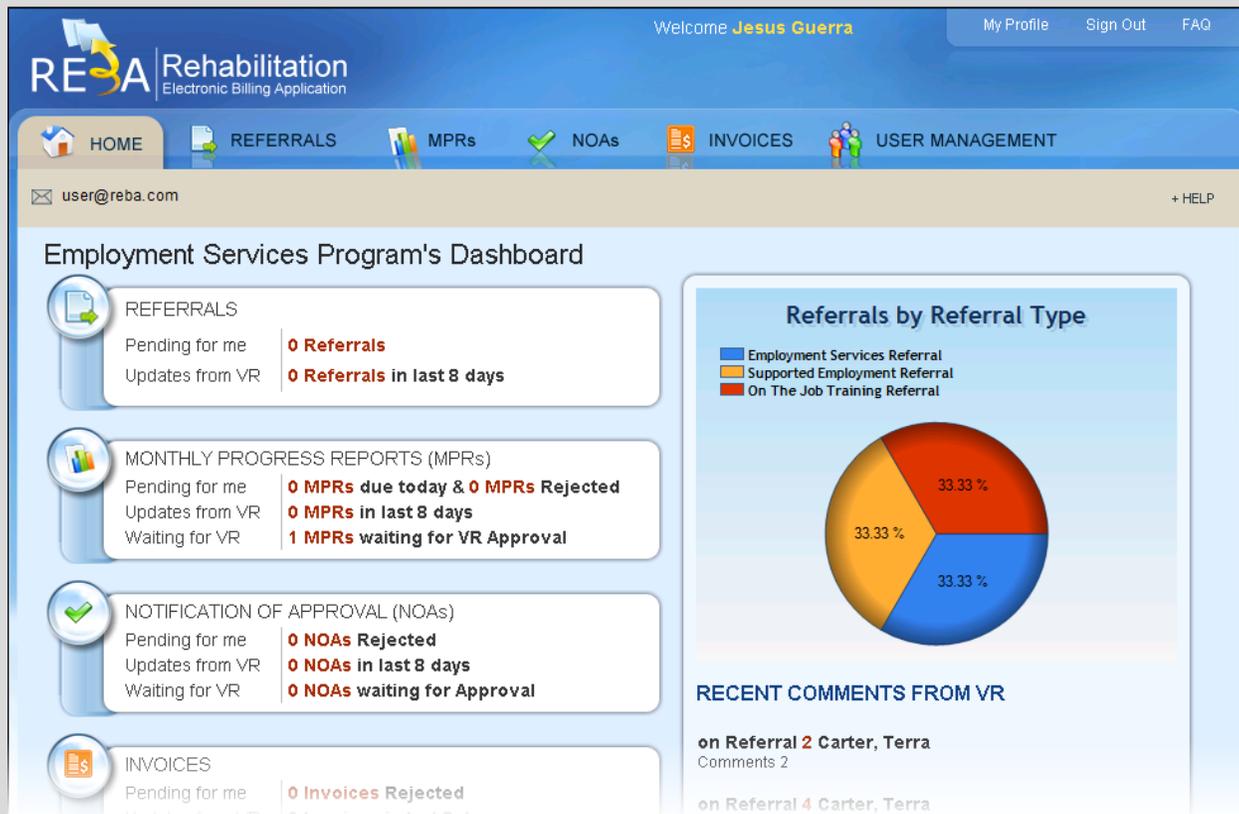


Figure 3: Supervisor's Dashboard

Upon successful login, supervisors can view dashboard area where they can view overall progress on referrals, MPRS, NOAs and invoices.

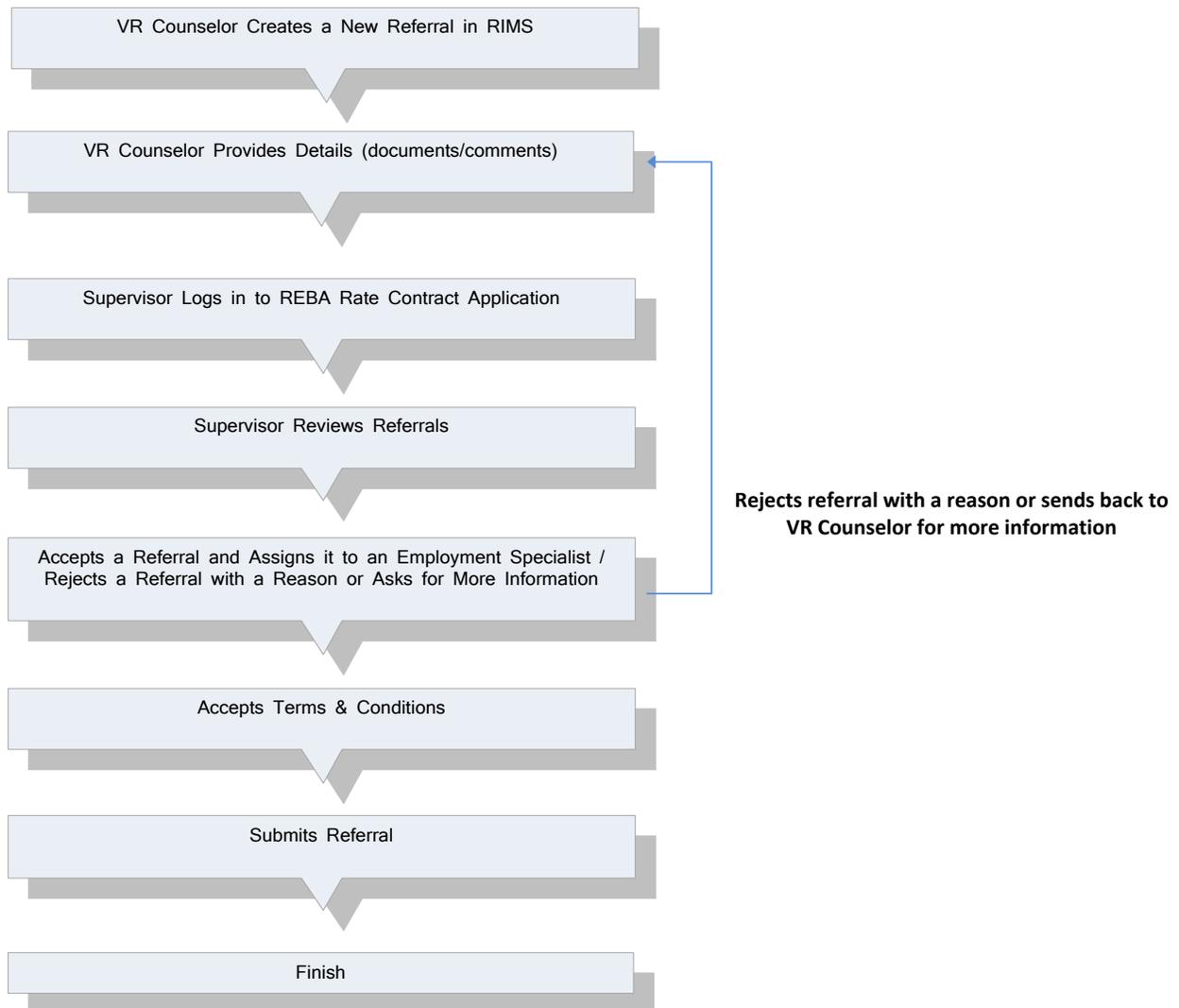
This includes:

- **Referrals**
 - Pending for me: Displays total number of pending referrals. Supervisors are required to review pending referrals, accept or reject new referrals, and assign referrals to employment specialists. Click to view pending referrals.
 - Updated from VR: Displays total number of referrals updated by VR Counselor in last seven days. Supervisors are required to review updated and take appropriate action. Click to view updated referrals.
- **Monthly Progress Reports**
 - Pending for me: Displays total number of MPRs due today, and total number of rejected MPRs. Click to view pending MPRs.
 - Updates from VR: Displays total number of MPRs updated by VR Counselor is last seven days. Click to view updated MPRs.
 - Waiting for VR: Displays total number of MPRs waiting for approval by VR Counselor. Click to view MPRs in the waiting queue.
- **Notification of Approvals**
 - Pending for me: Displays total number of rejected NOAs. Click to view pending NOAs.
 - Updates from VR: Displays total number of NOAs updated by VR Counselor is last seven days. Click to view updated NOAs.
 - Waiting for VR: Displays total number of NOAs waiting for approval by VR Counselor. Click to view NOAs in the waiting queue.
- **Invoices**
 - Pending for me: Displays total number of rejected invoices. Click to view pending invoices.
 - Updates from VR: Displays total number of invoices updated by VR Counselor is last seven days. Click to view updated invoices.
 - Waiting for VR: Displays total number of invoices waiting for approval by VR Counselor. Click to view invoices in the waiting queue.

Supervisors can also view recent comments by VR Counselor or current referrals as well as overall distribution of current referrals in graphical format, i.e., total number of Employment Services Referral, Supported Employment Services Referral, and On the Job Training Services Referral.

2.2 Managing Referrals

Referrals can be described as request for professional services such as employment services or on job training. Referrals are initiated by VR Counselor and assigned to service providers in RIMS application. Each referral has associated services and benchmarks assigned to it. A referral is closed when all benchmarks are completed. Supervisors can accept or reject a referral, assign it to an employment specialist, add comments or ask for further information before accepting it.



2.2.1 Reviewing Referrals

1. Click pending referrals or referrals updated by VR from Dashboard to view existing referrals or go to **Referrals** tab. It displays **Referral Search** page. You can find referrals by customer number, customer name or referral date. You can also filter referrals by referral status (Accepted, Rejected, Pending Acceptance, or Closed) or by Referral Type (Employment Services, Supported Employment Services and On the Job Training Services)
2. Select the referral that you want to review.

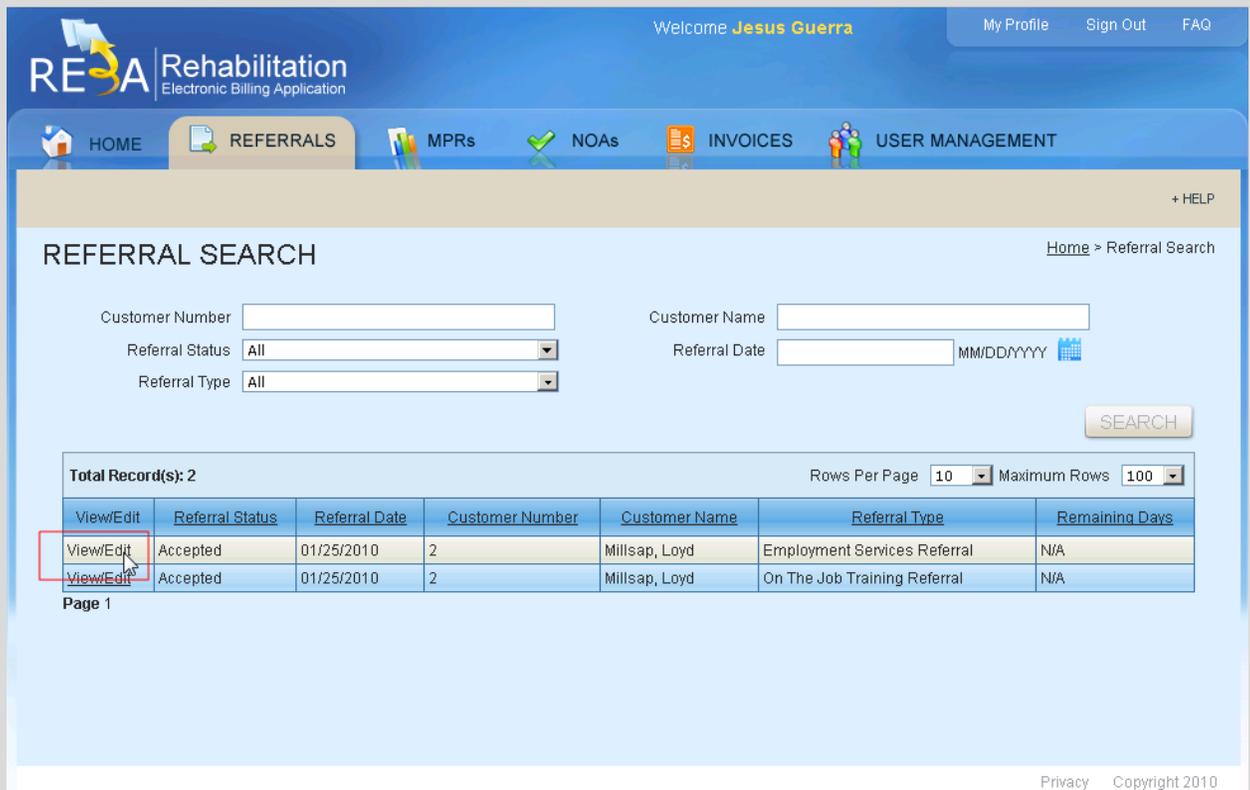
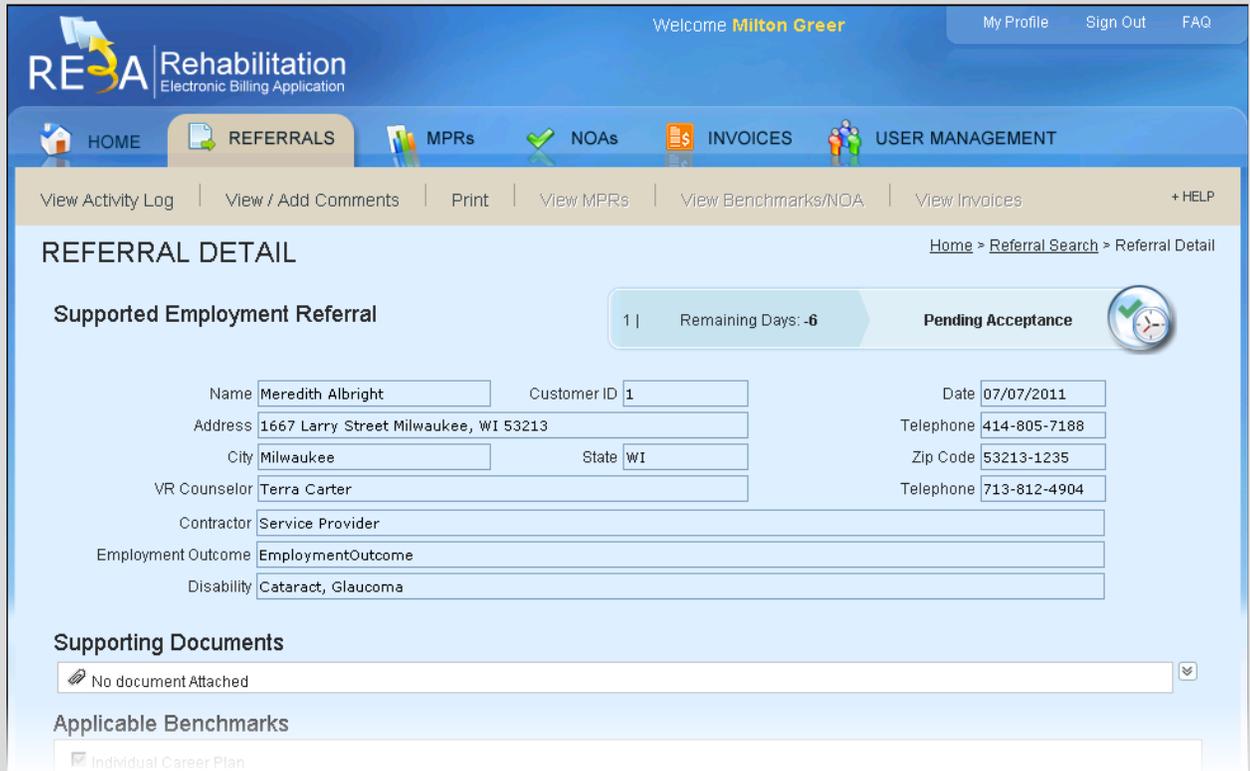


Figure 4: Viewing Referrals

3. Click **View/Edit** option. It displays details of the selected referral. You can view applicable benchmarks, attached documents, comments and details of required services.



While you are viewing details of a referral, you can also **view activity log, view/add comments, and print referral details**. For referrals in progress, you can also view associated MPRs, view benchmarks/NOA and invoices, if any.



The screenshot displays the 'REFERRAL DETAIL' page for a 'Supported Employment Referral'. The page includes a navigation bar with tabs for HOME, REFERRALS, MPRs, NOAs, INVOICES, and USER MANAGEMENT. Below the navigation bar, there are links for 'View Activity Log', 'View / Add Comments', 'Print', 'View MPRs', 'View Benchmarks/NOA', and 'View Invoices'. The main content area shows the referral details for 'Meredith Albright' with a Customer ID of '1' and a status of 'Pending Acceptance'. The details include Name, Address, City, State, Date, Telephone, Zip Code, VR Counselor, Contractor, Employment Outcome, and Disability. There is also a section for 'Supporting Documents' and 'Applicable Benchmarks'.

| | | | | | |
|--------------------|---------------------------------------|-------------|----|-----------|--------------|
| Name | Meredith Albright | Customer ID | 1 | Date | 07/07/2011 |
| Address | 1667 Larry Street Milwaukee, WI 53213 | | | Telephone | 414-805-7188 |
| City | Milwaukee | State | WI | Zip Code | 53213-1235 |
| VR Counselor | Terra Carter | | | Telephone | 713-812-4904 |
| Contractor | Service Provider | | | | |
| Employment Outcome | EmploymentOutcome | | | | |
| Disability | Cataract, Glaucoma | | | | |

Figure 5: Referral Details

2.2.2 Accepting and Assigning Referrals to Employment Specialists

1. Click pending referrals or referrals updated by VR from Dashboard to view existing referrals or go to **Referrals** tab. It displays **Referral Search** page. You can find referrals by customer number, customer name or referral date. You can also filter referrals by referral status (Accepted, Rejected, Pending Acceptance, or Closed) or by Referral Type (Community Referral, Employment Network Services etc.)
2. Select the referral that you want to accept.
3. Click **View/Edit** option.

4. Go to **Assigned To** section and select an employment specialist.
5. From **Make Decision** section, select **Accepted**.

The screenshot displays a web application interface with a light blue header and a white main content area. At the top left, the RE3A logo is visible. The main content area is divided into several sections. The first section, titled 'Assigned To', contains a list of three names with checkboxes: 'Louis Reed' (unchecked), 'Delphia Flores' (unchecked), and 'Tony Mason' (checked). Below this is a large text area with a light blue border containing the text: 'My counselor and I have discussed and agree that the following services will be provided to assist me in becoming employed: Supported Employment is Competitive Employment in an Integrated Setting maintained through the provision of Extended Services. These services include the following:'. Below the text area is a 'Make Decision' section with three radio buttons: 'Rejected' (unselected), 'Accepted' (selected), and 'More Info Required' (unselected). At the bottom of the form, there is a 'Recent Comments' section which is currently empty.

Figure 6: Assigning Referrals

6. Select **I accept the Terms & Conditions** checkbox and click **Submit**.

2.2.3 Rejecting New Referrals

1. Click pending referrals or referrals updated by VR from Dashboard to view existing referrals or go to **Referrals** tab. It displays **Referral Search** page. You can find referrals by customer number, customer name or referral date. You can also filter referrals by referral status (Accepted, Rejected, Pending Acceptance, or Closed) or by Referral Type (Community Referral, Employment Network Services etc.)
2. Select the referral that you want to reject.
3. Click **View/Edit** option.
4. From **Make Decision** section, select **Rejected** and select a reason for rejection.
5. Select **I accept the Terms & Conditions** checkbox and click **Submit**.



You can reject referrals only when they are on 'Pending Acceptance' state and you must specify a reason to reject a referral.

2.2.4 Asking for More Information on Referrals

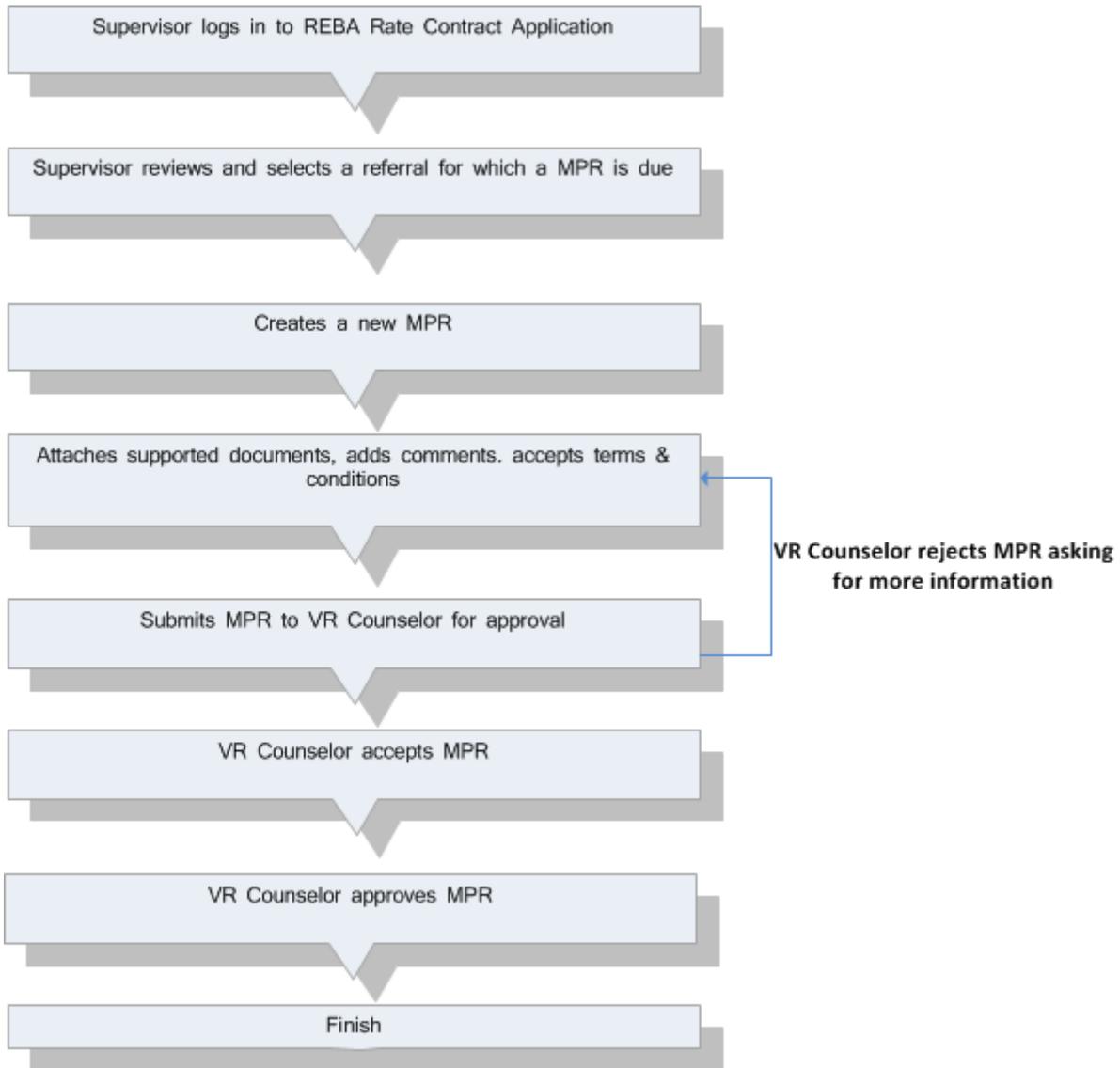
1. Click pending referrals or referrals updated by VR from Dashboard to view existing referrals or go to **Referrals** tab. It displays **Referral Search** page. You can find referrals by customer number, customer name or referral date. You can also filter referrals by referral status (Accepted, Rejected, Pending Acceptance, or Closed) or by Referral Type (Community Referral, Employment Network Services etc.)
2. Select the referral for which you want more information.
3. Click **View/Edit** option.
4. From **Make Decision** section, select **More Info Required**.
5. Use Comments box to ask question or more information.
6. Select **I accept the Terms & Conditions** checkbox and click **Submit**.



A referral can be sent back for further information only when it is in 'Pending Acceptance' state.

2.3 Managing Monthly Progress Reports (MPRs)

Supervisors must submit Monthly Progress Reports (MPRs) to keep record of overall progress and invoices on referrals. All submissions are sent to VR Counselor for approval. Rejected MPRs are sent back to service providers for updates or corrections.



2.3.1 Creating MPRs

1. Go to **Referral** tab. Find a referral for which you want to create MPR.
2. Click View MPRs from the second Navigation bar.
3. Click **Create New** button.

2.3.2 Submitting MPRs

1. Go to **MPRs** tab. It displays **MPR Search** page. You can find existing MPRs by Referral Date, Customer Number or Customer Name. You can also filter existing referrals by MPR Reporting Month, MPR Reporting Year, Referral Type or MPR status.
2. Find the required MPR and click **View/Edit** option. It opens **MPR Detail** page.

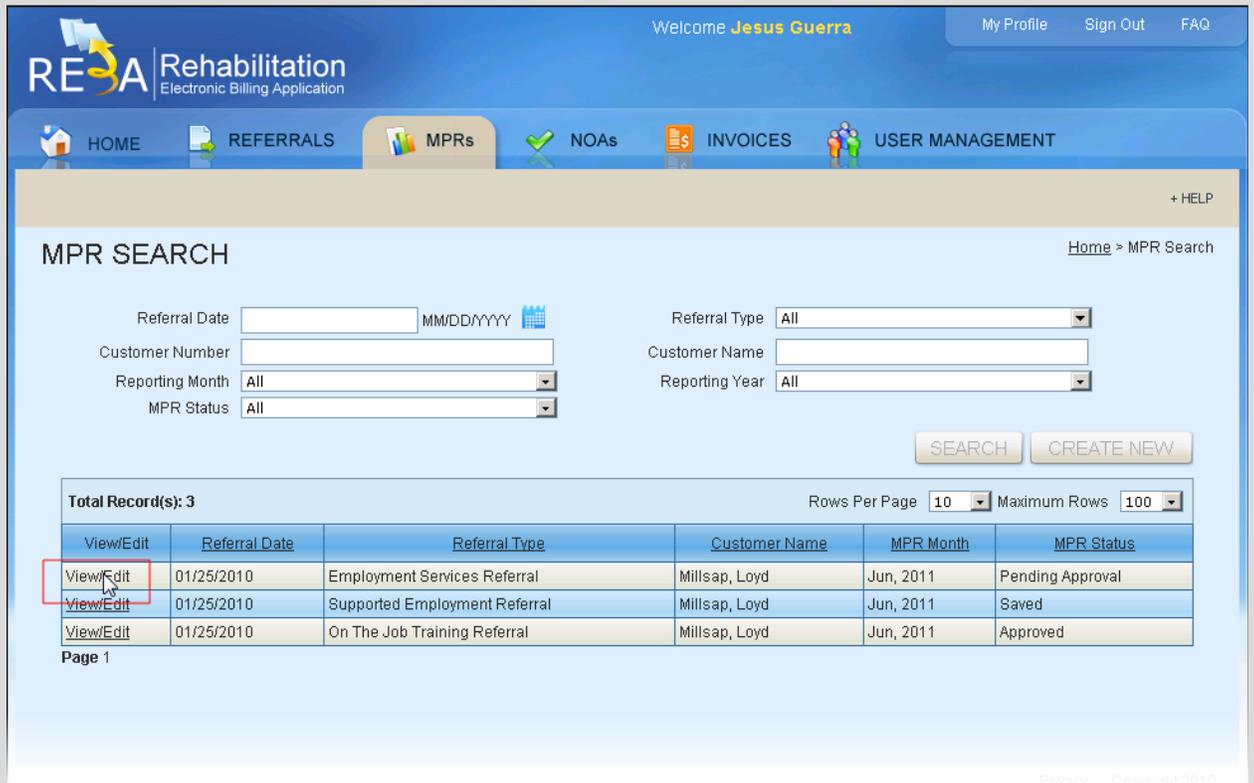


Figure 7: Viewing MPRs

3. Review MPR details. Select month of reporting, for example, June 2011.
4. Specify the employment specialist associated with the referral.
5. Click **Add New Service**. It displays **Service Rendered** page in a new window.
 - a. Specify the activity performed for the referral.
 - b. Provide date and brief description of the activity.
 - c. Click **Save**.

The screenshot displays the 'MPR DETAIL' page in the REBA application. The navigation bar includes HOME, REFERRALS, MPRs (active), NOAs, INVOICES, and USER MANAGEMENT. Below the navigation bar are links for 'View Activity Log', 'View / Add Comments', 'Print', and '+ HELP'. The breadcrumb trail is 'Home > MPR Search > MPR Detail'. A status bar shows '2 | June 2011 - 01' and a 'Saved' button with a floppy disk icon. A 'Go to Parent Referral' button is also present.

The form contains the following fields:

- Contract #: 4
- Customer Name: Loyd Millsap
- Customer ID: 2
- Referral: 4
- Referral Type: Supported Employment Referral
- Acceptance Date: 07/05/2011
- MPR Number: June 2011 - 01
- IPE Job Goal: IPEJobGoal

The 'Reporting Month' section has a 'Month' dropdown set to 'June' and a 'Year' dropdown set to '2011'.

The 'Employment Specialist' section has an 'Employment Specialist' dropdown set to 'Delphia Flores', an 'Email' field with 'Delphia.Flores@Reba.com', and a 'Telephone' field with '720-670-0977'.

The 'Service Rendered' section features a table with columns: Edit, Delete, Date, Activity, and Description. A red box highlights an 'Add New Service' button located to the right of the table.

Figure 8: Adding New Service

SERVICE RENDERED

Activity (Required)

Activity Date MM/DD/YYYY (Required)

Description (Required)

| Activity Date | Activity By | Activity | Description |
|---------------|-------------|----------|-------------|
|---------------|-------------|----------|-------------|

Figure 9: Adding Service Details

6. Upload supporting documents, if any.

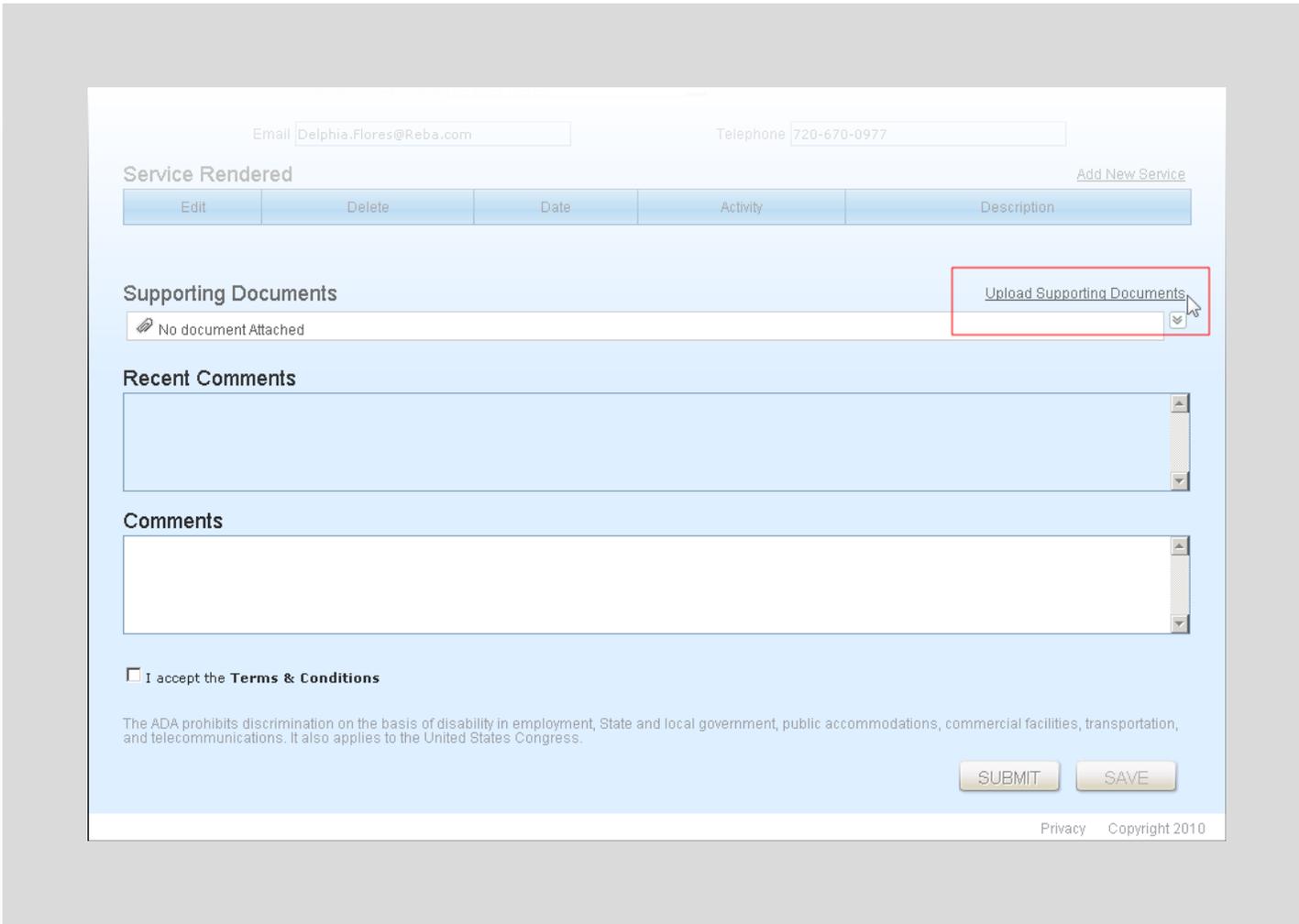


Figure 10: Uploading Supporting Documents

7. Add comments, if required. Select **I accept the Terms & Conditions**.
8. Click **Submit**. You can also save MPR to review and submit it later.

You can generate MPRs for an accepted referral only until it is closed.

 For each referral, MPR must be submitted every month until the referral is closed. Administrators can specify a grace period for submitting MPRs after the due date has passed.

For services rendered for a referral, you must provide date and details of activities performed.

2.3.3 Reviewing and Updating Rejected MPRs

1. Go to **MPRs** tab. It displays **MPR Search** page. From MPR Status drop down list, select Rejected.
2. Click **Search** to view all rejected MPRs.
3. Click **View/Edit** option to select the MPR that you want to update. It opens **MPR Detail** page.
4. Review comments and update MPR as per requirements. You can add comments, upload supporting documents or add details of services. To provide service details,
 - a. Click **Add New Service**. It displays **Service Rendered** page in a new window.
 - b. Specify the activity performed for the referral.
 - c. Provide date and brief description of the activity.
 - d. Click **Save**.
5. Select **I accept the Terms & Conditions** and click **Submit**. You can also save selected MPR to review and submit it later.

2.3.4 Reviewing Submitted/Saved MPRs

1. Go to **MPRs** tab. It displays **MPR Search** page. From MPR Status drop down list, select Pending Approval, Saved or Approved.
2. Click **Search** to view all submitted/saved MPRs.

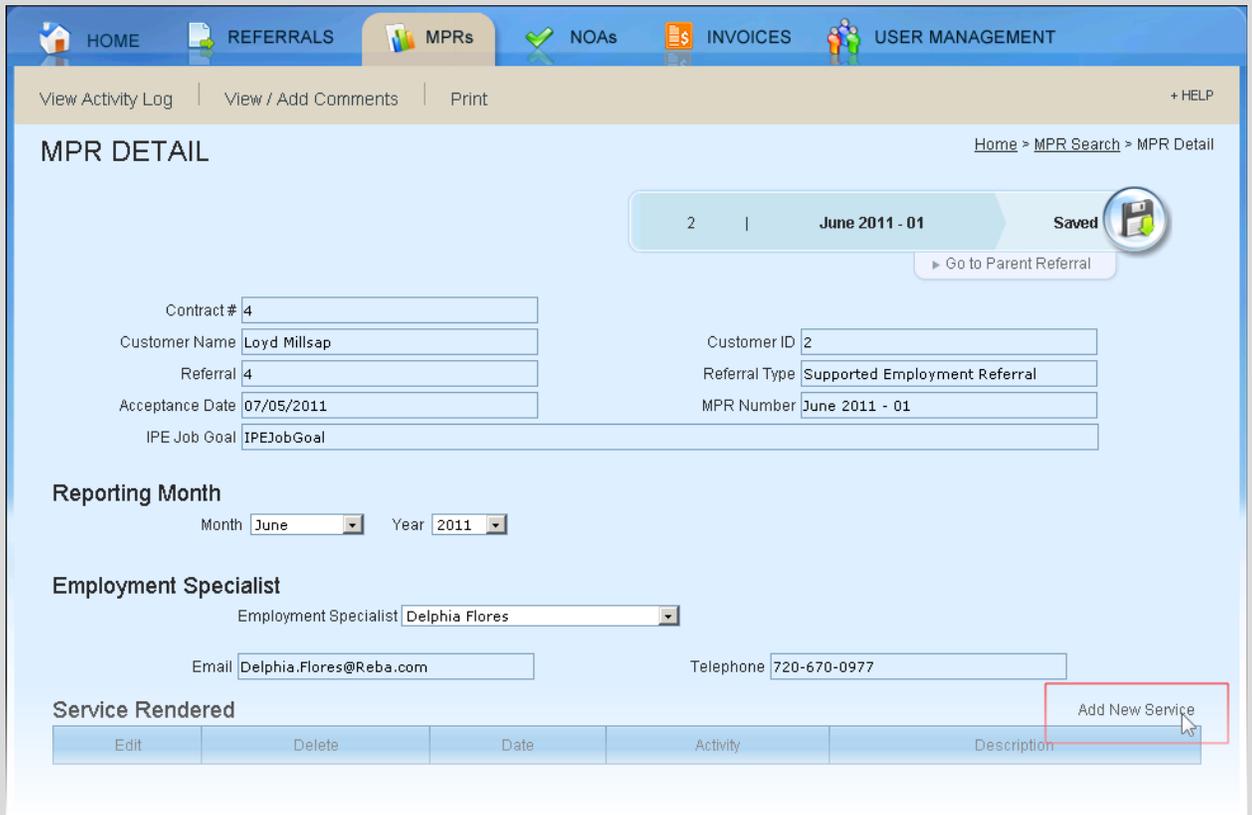


Figure 11: Reviewing Submitted/Saved MPRs

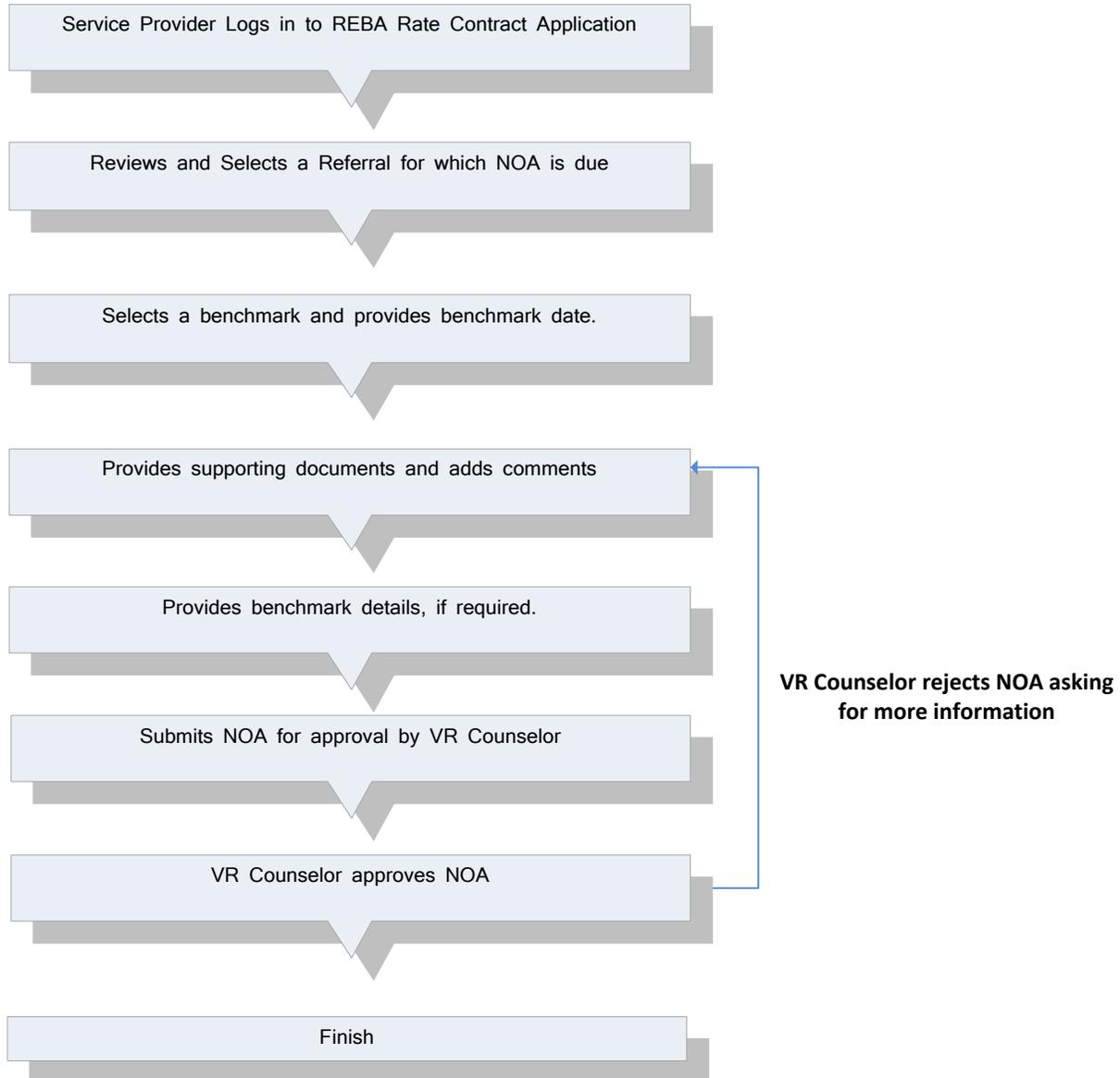
3. Click **View/Edit** option to select the MPR that you want to review.
4. It opens **MPR Detail** page with complete details of the selected MPR for your review.
5. Make appropriate changes, if required, and then submit or save MPR.



While you are viewing details of MPR, you can also go to parent referral, view activity log, view/add comments, and print details of MPR.

2.4 Managing Notification of Approvals (NOAs)

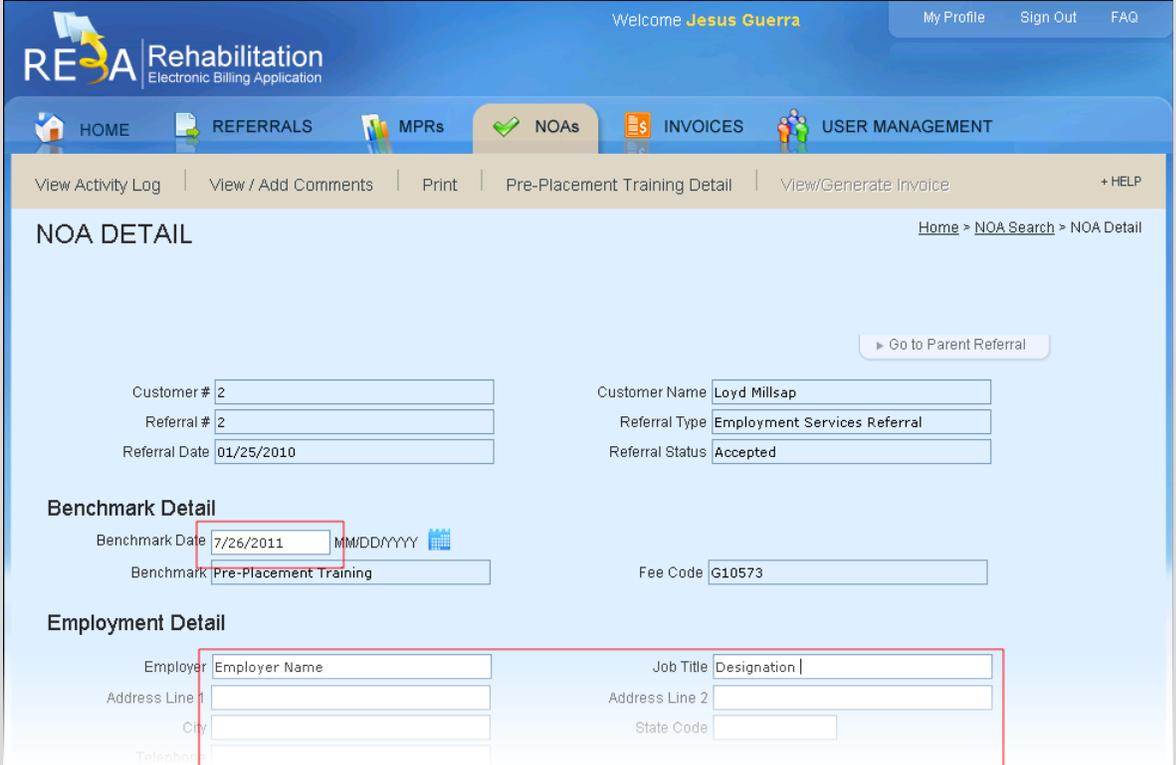
Notification or Approvals (NOAs) are required for invoicing purposes and to ensure that all benchmarks associated a referral have been completed. You must submit an NOA request whenever a benchmark is achieved. Once an NOA has been submitted, it can be either approved or rejected.



2.4.1 Submitting NOAs

4. Go to **Referral** tab. Find a referral for which you want to submit NOA.
5. Click **View/Edit** option to go to **Referral** detail.
6. Click **View Benchmark/NOA** link on the second Navigation bar.
7. Select the benchmark for which you want to submit NOA. Select **Create**. If a benchmark is already saved, click **View/Edit** option. It displays **NOA Detail** page.

8. Provide benchmark date and employment details.



The screenshot shows the 'NOA DETAIL' page in the RE3A Rehabilitation Electronic Billing Application. The page is titled 'NOA DETAIL' and includes a breadcrumb trail: Home > NOA Search > NOA Detail. A 'Go to Parent Referral' button is located at the top right. The form contains the following fields:

- Customer #: 2
- Referral #: 2
- Referral Date: 01/25/2010
- Customer Name: Loyd Millsap
- Referral Type: Employment Services Referral
- Referral Status: Accepted
- Benchmark Date: 7/26/2011 (MM/DD/YYYY)
- Benchmark: Pre-Placement Training
- Fee Code: G10573
- Employment Detail (highlighted with a red box):
 - Employer Name: [Empty]
 - Job Title: Designation | [Empty]
 - Address Line 1: [Empty]
 - Address Line 2: [Empty]
 - City: [Empty]
 - State Code: [Empty]
 - Telephone: [Empty]

Figure 12: Benchmark Details



Employment Detail is only required for Employment Services and Supported Employment Services referral types.

9. Click **Link MPRs** to attach MPRs related to the benchmark.
 - a. It displays **Associated MPRs** page. Find the MPR that you want to link with the benchmark and select **Link** checkbox from the grid.
 - b. Click **Save**.

The screenshot shows a web form for a Rate Contract Application. At the top left, there is a tab labeled 'Other Benefits'. Below it is the 'Associated MPRs' section, which currently displays 'No MPR Associated'. A red rectangular box highlights a 'Link MPRs' button in the top right corner of this section. Below the MPRs section is the 'Supporting Documents' section, which has a text input field containing 'No document Attached' and a small icon to its right. To the right of this section is a link that says 'Upload Supporting Documents'. Below that is the 'Recent Comments' section, which is an empty text area. Underneath is the 'Comments' section, also an empty text area. At the bottom left of the form, there is a checkbox labeled 'I accept the Terms & Conditions'. At the bottom right, there are two buttons: 'SUBMIT' and 'SAVE'. In the bottom right corner of the page, there is a footer with the text 'Privacy Copyright 2010'.

Figure 13: Linking MPRs



Only “approved” MPRs can be linked.

10. Attach supporting documents.
11. Type comments, if required.
12. For Pre-Placement NOAs, you should also provide details of training conducted for the associated referral.
13. Select **I accept the Terms & Conditions** checkbox.
14. Submit NOA. You can also click **Save** to review and submit NOA later.



You can generate NOA for accepted referral only. You can generate only one NOA for each benchmark.

2.4.2 Reviewing and Updating Rejected NOAs

1. Go to **NOAs** tab. It displays **NOA Search** page.
2. From NOA Status drop down list, select Rejected.
3. Click **Search** to view all rejected NOAs.
4. Select the NOA that you want to review and submit. Click **View/Edit** option. It displays details of the selected NOA.
5. Review comments and make changes as per your requirements. You can modify benchmark date, edit employment details, associate MPRs, attach supporting documents or add comments.
6. Select **I accept the Terms & Conditions** checkbox.
7. Submit NOA. You can also click **Save** to review and submit NOA later.

2.4.3 Reviewing Submitted/Saved NOAs

1. Go to **NOAs** tab. It displays **NOA Search** page.
2. From NOA Status drop down list, select Approved, Saved or Pending Approval.
3. Click **Search** to view all submitted/saved NOAs.
4. Click **Edit/View** option to view details of selected NOA.
5. Make appropriate changes, if required, and then submit or save NOA.

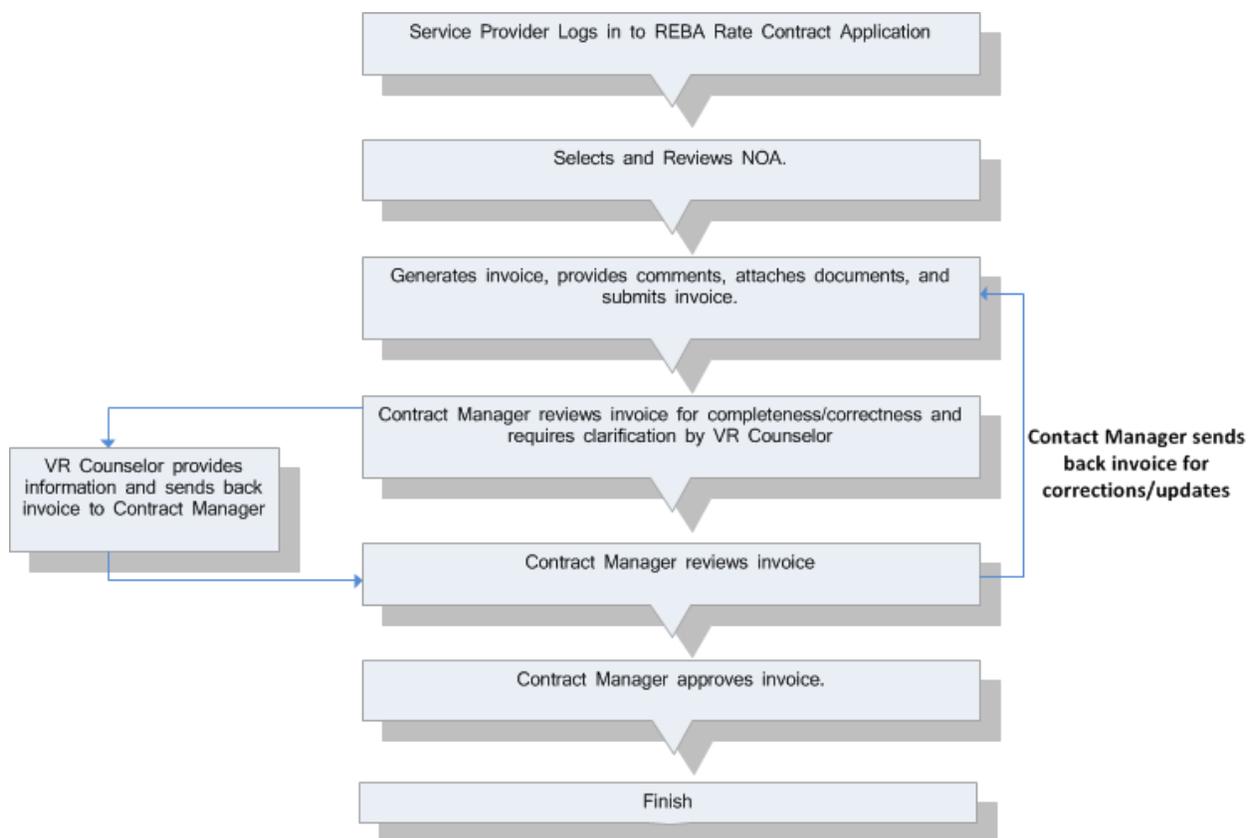


While you are viewing details of NOA, you can also go to parent referral, view activity log, view/add comments, print details of MPR, view associated benchmarks, and view/generate invoices.

2.5 Managing Invoices

An Invoice is due as soon a benchmark has been achieved and its NOA is approved. All payments are made on the basis of invoices submitted and approved. All submissions are reviewed by Contract Managers for completeness and correctness. In case of clarification required for an invoice, Contract Managers ask VR Counselor for clarification. VR Counselor provides necessary information and sends updated invoice to Contract Managers. At this stage, Contract Managers can approve the invoice or send it back to Supervisor for corrections.

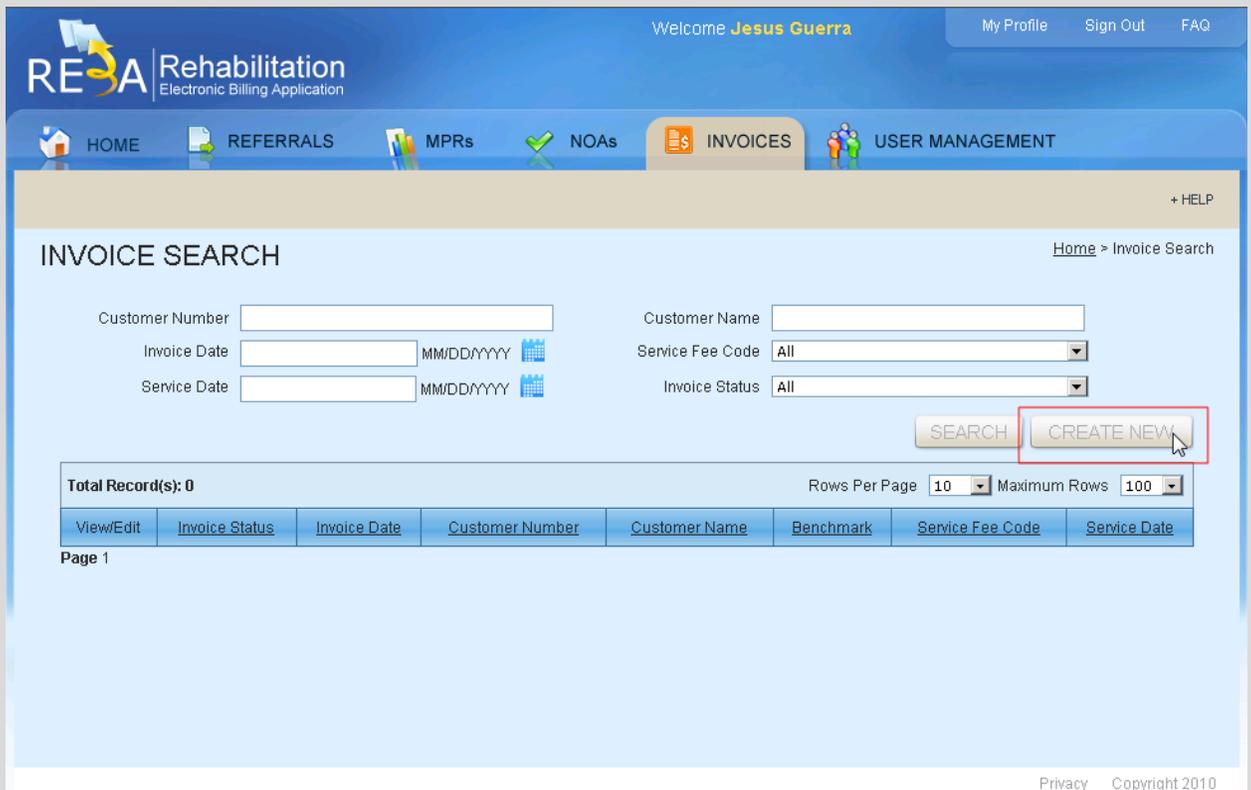
Rejected invoices have to be corrected and submitted again by Supervisors for approval by Contract Managers.



2.5.1 Creating/Submitting Invoices

Before you can create a new invoice, you must have its associated NOA approved for a referral. To create a new invoice for an approved NOA:

1. Go to **Invoices** tab and click **Create New**. It displays **NOA Select** page. Find an NOA for which you want to submit a new invoice.



INVOICE SEARCH Home > Invoice Search

Customer Number Customer Name

Invoice Date MM/DD/YYYY Service Fee Code

Service Date MM/DD/YYYY Invoice Status

SEARCH **CREATE NEW**

Total Record(s): 0 Rows Per Page 10 Maximum Rows 100

| View/Edit | Invoice Status | Invoice Date | Customer Number | Customer Name | Benchmark | Service Fee Code | Service Date |
|-----------|----------------|--------------|-----------------|---------------|-----------|------------------|--------------|
|-----------|----------------|--------------|-----------------|---------------|-----------|------------------|--------------|

Page 1

Privacy Copyright 2010

Figure 14: Creating a New Invoice

2. Click **Select** option to select a required NOA from search results. It displays Invoice page.
3. Review details of NOA and generate a new invoice. The option to generate invoice is available only if an invoice is not already generated for selected NOA. Details of invoices are generated automatically by the system.
4. Attach supporting documents, if required.
5. Type comments, if required.
6. Select **I accept the Terms & Conditions** checkbox.

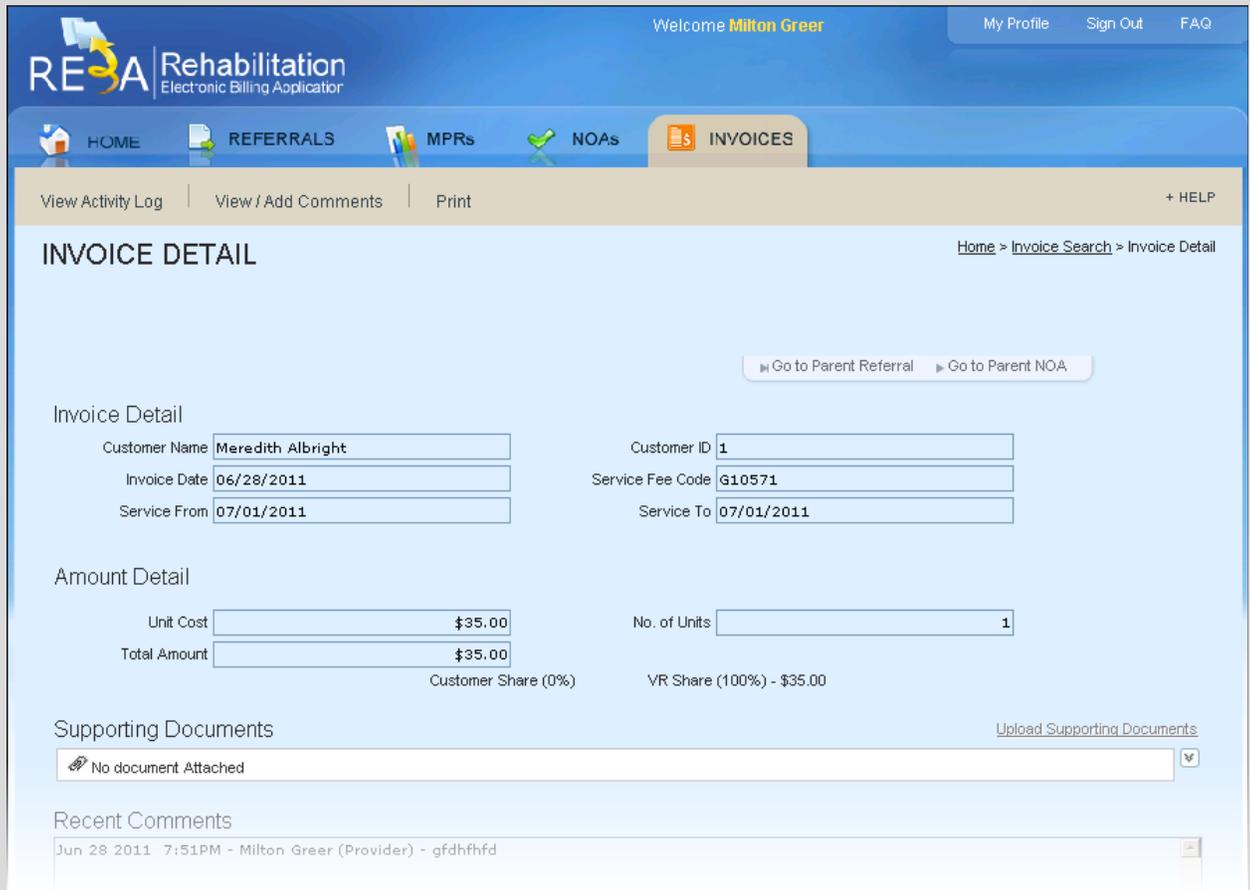


Figure 15: Invoice Detail

7. Submit Invoice. You can also click **Save** to review and submit Invoice later. While you are creating a new invoice, you can print selected Invoice, view activity log, or view/add comments.



You can generate Invoices for approved NOAs only.

2.5.2 Reviewing and Updating Rejected Invoices

1. Go to **Invoices** tab. It displays **Invoice Search** page.
2. From Invoice Status drop down list, select Rejected.

3. Click **Search** to view all rejected invoices or invoices that require further clarification for approval.
4. Click **Edit/View** option to view details of selected invoice.
5. Review comments and make appropriate changes.
6. You can add comments or attach supporting documents.
7. Select **I accept the Terms & Conditions** checkbox.
8. Submit invoice or save it to submit it later.

2.5.3 Reviewing Submitted/Saved Invoices

1. Go to **Invoices** tab. It displays **Invoice Search** page.
2. From Invoice Status drop down list, select Saved, Pending Approval or Approved.
3. Click **Search** to view all submitted/saved invoices.
4. Click **Edit/View** option to view details of selected invoice.
5. Make appropriate changes, if required, and then submit or save invoice.



While you are viewing details of an invoice, you can also go to parent referral or parent NOA, view activity log, view/add comments, and print details of invoice.

For approved invoices, you can also view Warrant Number of the invoice on Invoice Detail page.

2.6 User Management

Access to REBA application depends on rights and permissions assigned to users. Each user is assigned a unique ID and a job role which is used to determine what actions a particular user can perform.

2.6.1 Creating a New User

1. Go to **User Management** tab and click **Create New**. It displays **User Details** page.
2. Specify type of the user and then select a Provider.
3. From **Employment Specialist** list, select a user for which you are creating an ID.
4. Provide the following details:
 - a. **Employment Specialist:** Select an employment specialist.
 - b. **User ID:** Provide a unique email address.
 - c. **Password:** Type a password for the user. It is highly recommended that you select a strong password (at least 8 characters long) that contains at least one capital letter, one numeric and one special character, and some small letters.
 - d. **Confirm Password:** Type password again for confirmation.
 - e. **Status:** Select **Active** radio button to activate the user. Select **Inactive** option if you want to activate the user later.
 - f. **Secret Question:** Select a secret question.
 - g. **Answer:** Type answer to the secret question.
 - h. **Hint:** Type a hint for the answer to secret question.
5. Save settings.

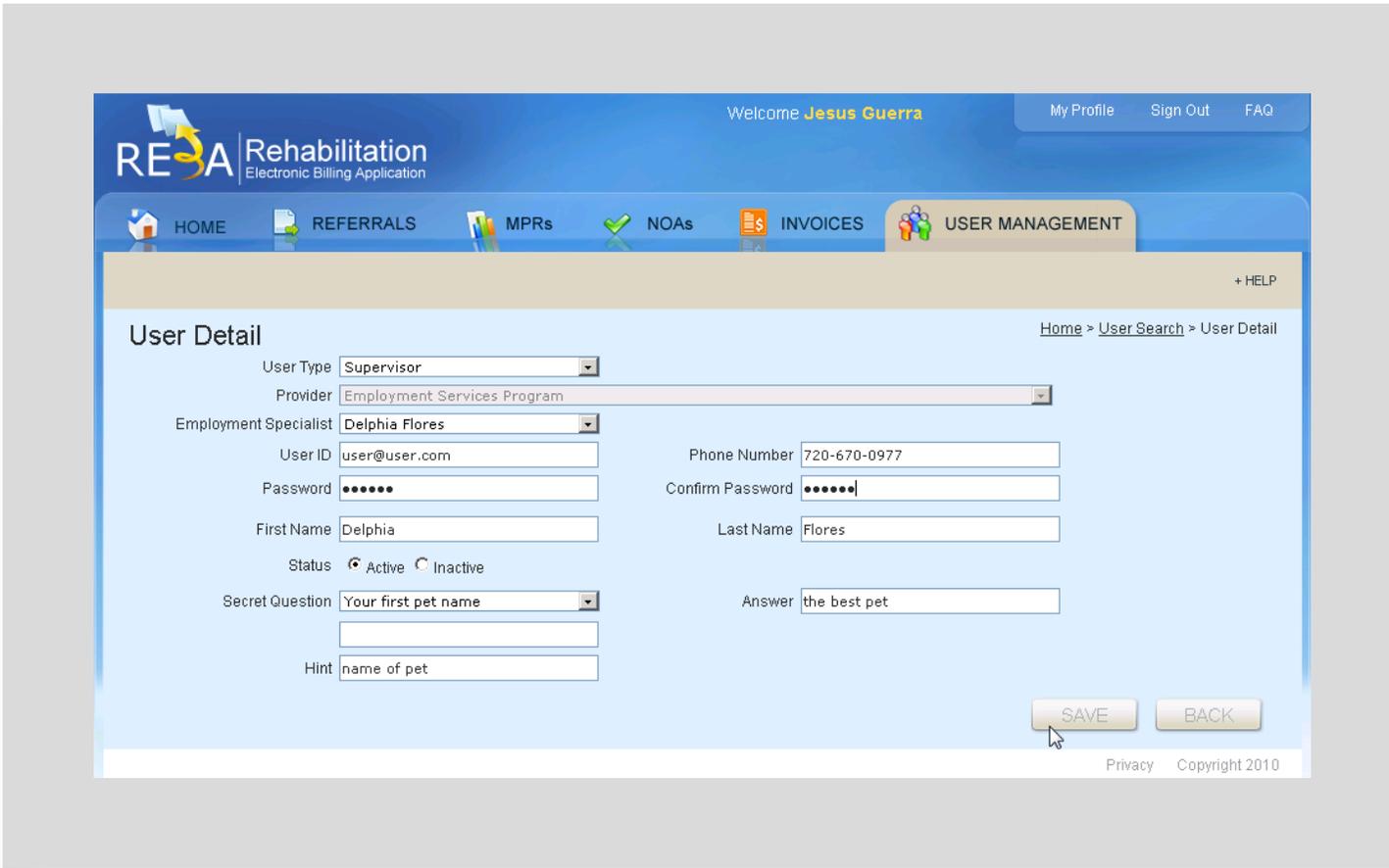


Figure 16: New User

2.6.2 Viewing/Modifying Existing Users

1. Go to **User Management** tab. It displays **User Search** page.
2. You can find existing users by name or ID. You can also filter existing users by user type, by provider, or by status.
3. Select the user and click **View/Edit** option. It displays details of the selected user.
4. Make appropriate changes and click **Save** to finish.

3 REBA for Employment Specialists

Employment Specialists are responsible for managing their assigned referrals and associated MPRs, NOAs and invoices. These referrals are assigned to employment specialists by their Supervisors.

3.1 Employment Specialist’s Dashboard

Upon successful login, employment specialists can view a list of assigned referrals. Click **View/Edit** option to process or view details of selected referral.

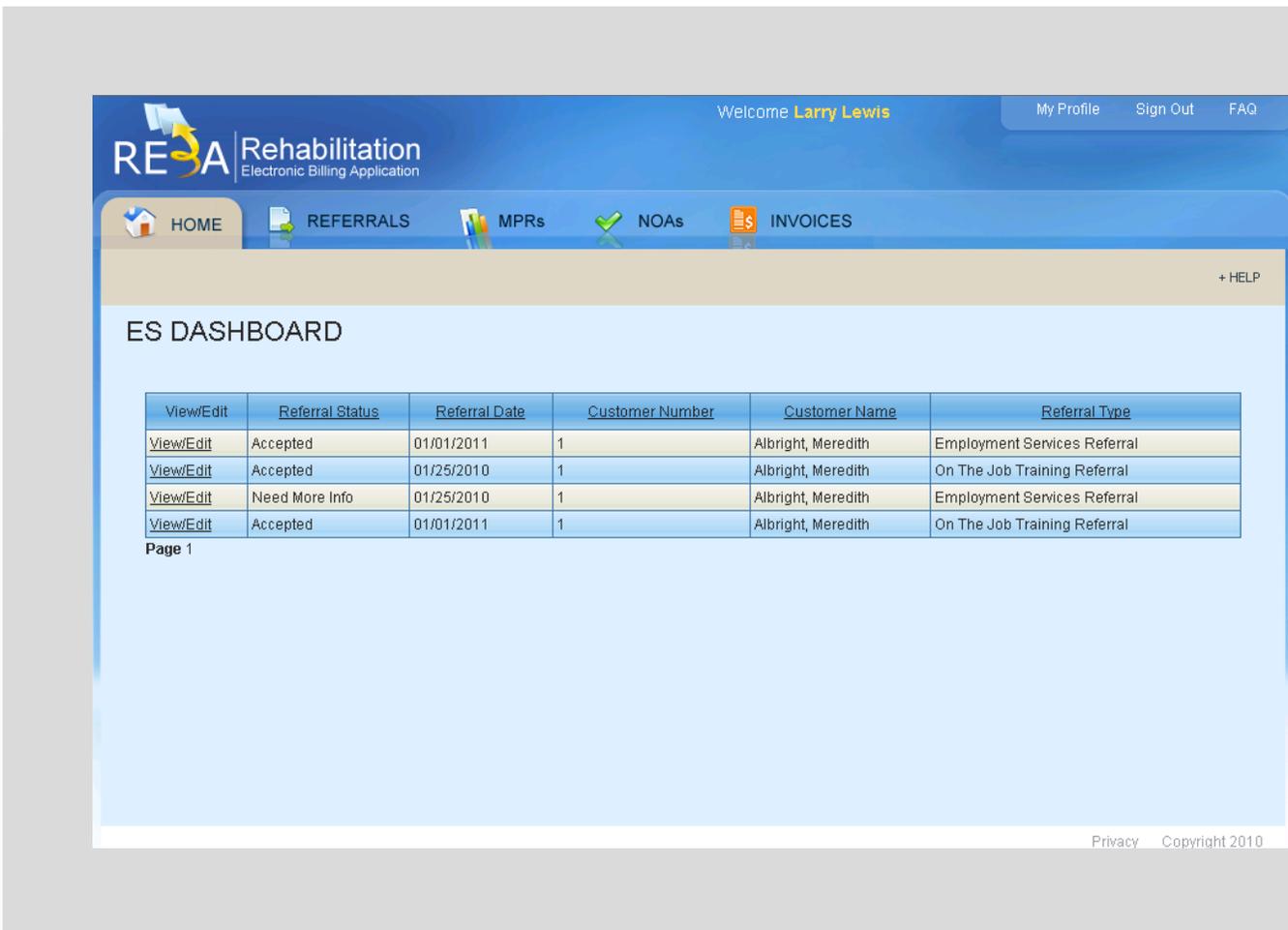


Figure 17: Employment Specialist Dashboard

3.2 Employment Specialist’s Tasks

Employment Specialists **can**:

- a. [Search and view assigned referrals](#)
- b. Review assigned referrals to
 - Print referral details
 - View comments, supporting documents, and past activities
- c. [Search and view MPRs](#)
- d. [Create and save new MPRs](#)
- e. [Review existing MPRs to](#)
 - Update MPR details
 - Print MPR details
 - View comments, supporting documents, and past activities
 - Add comments or upload supported documents
- f. [Search and view NOAs](#)
- g. [Create and save new NOAs](#)
- h. [Review existing NOAs to](#)
 - Update NOA details
 - Print NOA details
 - View comments, supporting documents, and past activities
 - Add comments or upload supported documents
- i. [Search and view Invoices](#)
- j. [Create and save new Invoices](#)
- k. [Review existing Invoices to](#)
 - Update Invoice details
 - Print Invoice details
 - View comments, supporting documents, and past activities
 - Add comments or upload supported documents

However, employment specialists **cannot**:

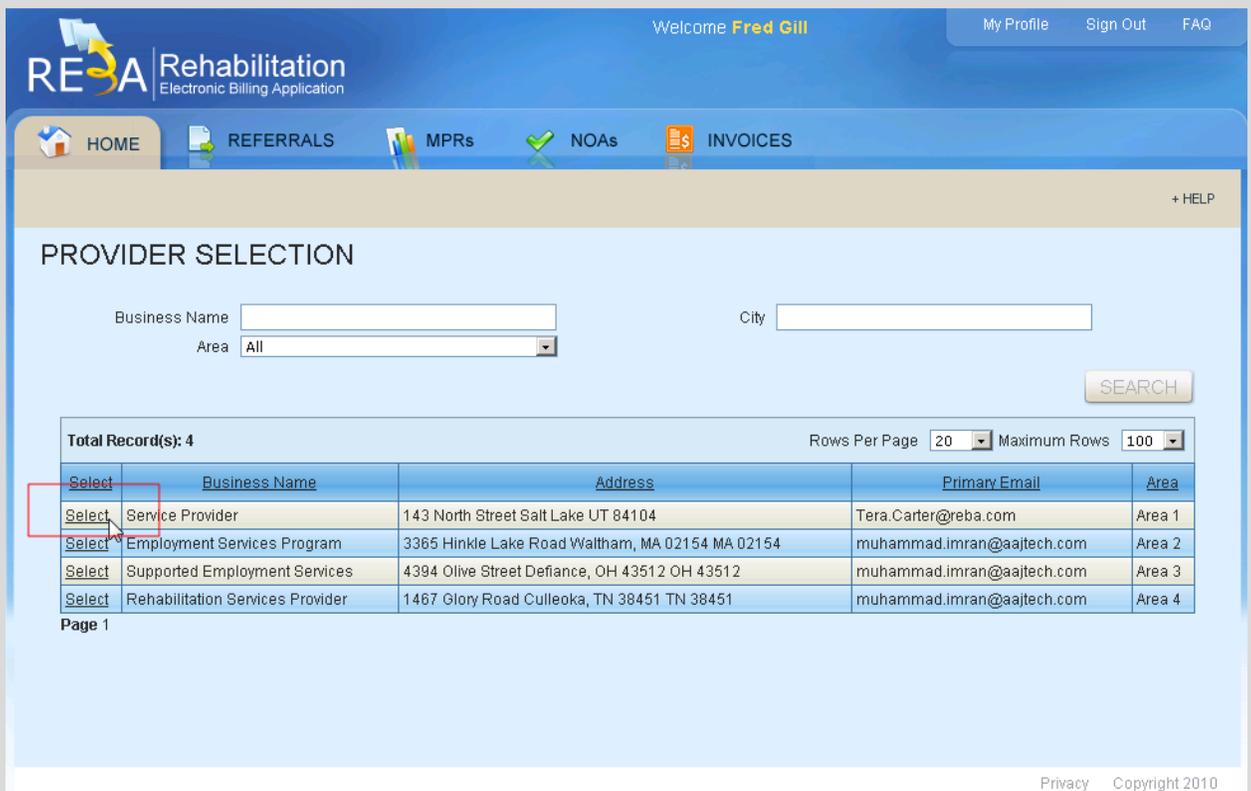
- a. Accept or reject a referral
- b. Add comments or supported documents to a referral
- c. Assign referral to another employment specialist
- d. Send referral back to VR Counselor for more information
- e. Submit NOA/MPR/Invoice for approval

4 REBA for Contract Managers

As a Contract Manager, you can view and monitor all service providers. Upon successful login to REBA Rate Contract application, you would be able to view a list of all existing service providers. Clicking on a service provider allows you to use REBA Rate Contract application as the selected services provider would use it (with the same data).

4.1 Contract Manager’s Dashboard

Upon successful login, Contract Managers can view a list of service providers. Selecting a service provider allows Contract Managers to view Dashboard of the selected service provider and view all the information that the particular service provider can see (with exactly the same data that the particular service provider would access).



The screenshot shows the REBA Rehabilitation Electronic Billing Application interface. At the top, there is a navigation bar with the REBA logo and the text 'Rehabilitation Electronic Billing Application'. To the right of the logo, it says 'Welcome Fred Gill' and has links for 'My Profile', 'Sign Out', and 'FAQ'. Below the navigation bar, there are icons for 'HOME', 'REFERRALS', 'MPRs', 'NOAs', and 'INVOICES'. A '+ HELP' link is also present.

The main content area is titled 'PROVIDER SELECTION'. It features search filters for 'Business Name', 'City', and 'Area' (set to 'All'). A 'SEARCH' button is located to the right of these filters. Below the filters, it displays 'Total Record(s): 4' and 'Rows Per Page: 20' and 'Maximum Rows: 100'. A table lists the providers with columns for 'Select', 'Business Name', 'Address', 'Primary Email', and 'Area'. A red box highlights the 'Select' column of the first row.

| Select | Business Name | Address | Primary Email | Area |
|--------|----------------------------------|--|----------------------------|--------|
| Select | Service Provider | 143 North Street Salt Lake UT 84104 | Tera.Carter@reba.com | Area 1 |
| Select | Employment Services Program | 3365 Hinkle Lake Road Waltham, MA 02154 MA 02154 | muhammad.imran@aaitech.com | Area 2 |
| Select | Supported Employment Services | 4394 Olive Street Defiance, OH 43512 OH 43512 | muhammad.imran@aaitech.com | Area 3 |
| Select | Rehabilitation Services Provider | 1467 Glory Road Culleoka, TN 38451 TN 38451 | muhammad.imran@aaitech.com | Area 4 |

Page 1

Privacy Copyright 2010

Figure 18: Contract Manager's Dashboard

You can switch between service providers by clicking **Change Provider** link.

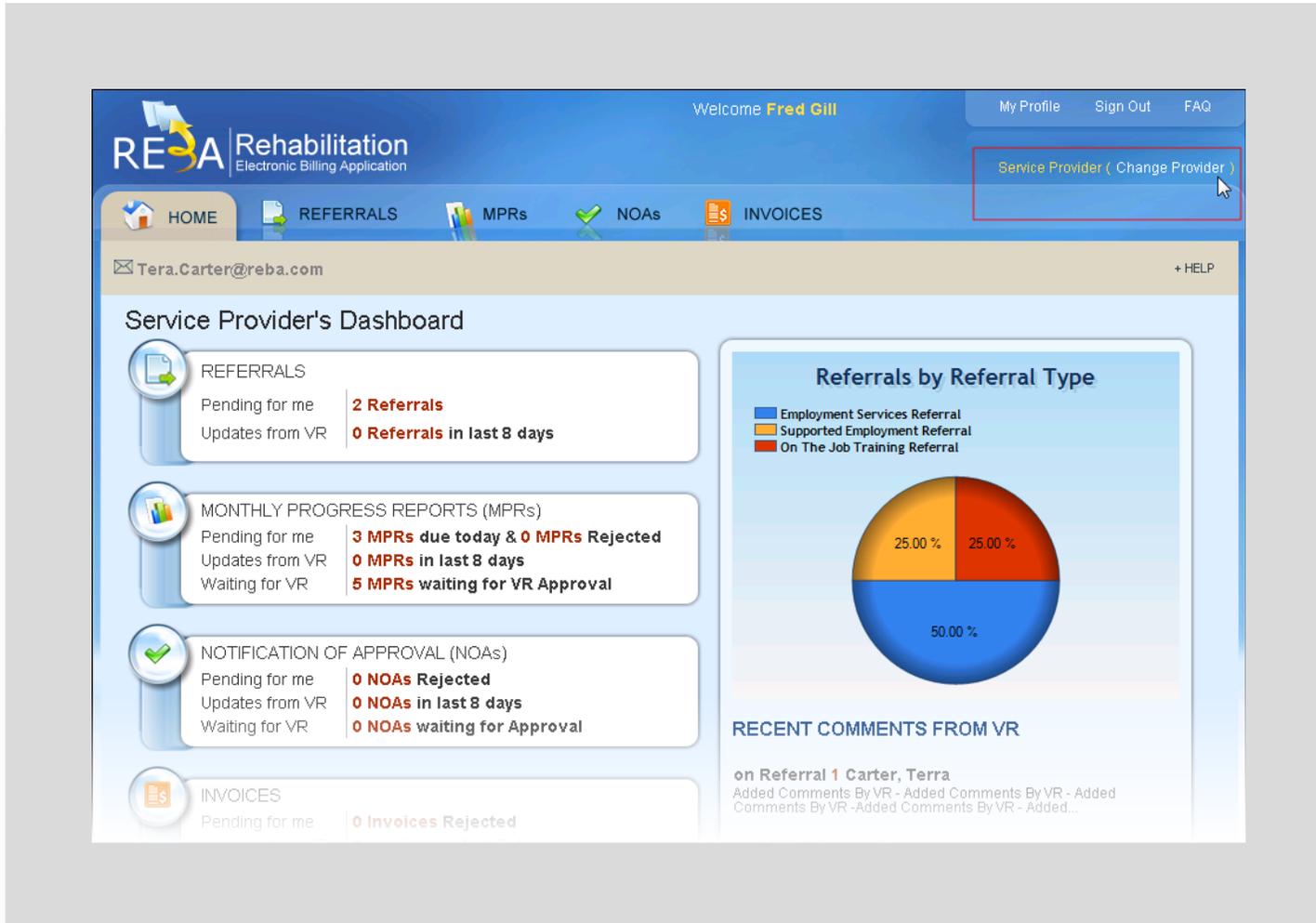


Figure 19: Change Provider

Appendix A: Access Control List

Please note that table below only describes the general access requirements for REBA application. Information view, edit and/ or delete operations may be limited (or extended) based on the business rules depending upon the business process.

Key: ✓ = Allowed; ✗ = Not Allowed; ⚪ = Not Applicable

| Permission / User Type | Service Provider Employment Specialist * | Service Provider Supervisor |
|--|--|--------------------------------|
| Referral | | |
| Search referral | ✓ | ✓ |
| View referral detail | ✓ | ✓ |
| View a rejected referral | ✗ | ✗ |
| Update referral detail | ✗ | ✗ |
| Create new referral | ✗ | ✗ |
| Accept or reject a referral | ✗ | ✓ |
| Add comments to referral | ✗ | ✓ |
| View comments for a referral | ✓ | ✓ |
| View activity log of a referral | ✓ | ✓ |
| Add supporting documents for a referral | ✗ | ✗ |
| View supporting documents of a referral | ✓ | ✓ |
| Print a referral | ✓ | ✓ |
| Send referral back to VR for more information | ✗ | ✓ |
| Assign Employment Specialist to an accepted referral | ✗ | ✓ |
| NOAs | | |
| Search NOA | ✓ | ✓ |
| View NOA detail | ✓ | ✓ |
| Create new NOA (Save) | ✓ | ✓ |
| Update NOA detail (Save) | ✓ | ✓ |
| Attach supporting documents | ✓ | ✓ |
| View supporting documents | ✓ | ✓ |

| | | |
|--|---|---|
| View comments | ✓ | ✓ |
| Add comments | ✓ | ✓ |
| Submit NOA to VR for review / approval | ✗ | ✓ |
| Print NOA | ✓ | ✓ |
| View activity log | ✓ | ✓ |
| MPR | | |
| Search MPR | ✓ | ✓ |
| View MPR detail | ✓ | ✓ |
| Create new MPR (Save) | ✓ | ✓ |
| Update MPR detail (Save) | ✓ | ✓ |
| Attach supporting documents | ✓ | ✓ |
| View supporting documents | ✓ | ✓ |
| View comments | ✓ | ✓ |
| Add comments | ✓ | ✓ |
| Submit MPR to VR for review / approval | ✗ | ✓ |
| Print MPR | ✓ | ✓ |
| View activity log | ✓ | ✓ |
| Invoicing | | |
| Search Invoice | ✓ | ✓ |
| View Invoice detail | ✓ | ✓ |
| Create new Invoice (Save) | ✓ | ✓ |
| Update Invoice detail (Save) | ✓ | ✓ |
| Attach supporting documents | ✓ | ✓ |
| View supporting documents | ✓ | ✓ |
| View comments | ✓ | ✓ |
| Add comments | ✓ | ✓ |
| Submit Invoice for review / approval | ✗ | ✓ |
| Print Invoice | ✓ | ✓ |
| View activity log | ✓ | ✓ |
| * An employment specialist will be able to view / update details of a referral only which is ASSIGNED to him / her whereas Supervisor will be able to view / update all the referrals. Same rule applies to all other entities i.e. MPR, NOA and Invoice | | |

List of Figures

| | |
|--|----|
| Figure 1: REBA - Login Screen | 6 |
| Figure 2: REBA - Home Screen | 7 |
| Figure 3: Supervisor's Dashboard | 9 |
| Figure 4: Viewing Referrals | 12 |
| Figure 5: Referral Details..... | 13 |
| Figure 6: Assigning Referrals..... | 14 |
| Figure 7: Viewing MPRs | 17 |
| Figure 8: Adding New Service | 18 |
| Figure 9: Adding Service Details..... | 19 |
| Figure 10: Uploading Supporting Documents..... | 20 |
| Figure 11: Reviewing Submitted/Saved MPRs..... | 22 |
| Figure 12: Benchmark Details | 24 |
| Figure 13: Linking MPRs..... | 25 |
| Figure 14: Creating a New Invoice | 28 |
| Figure 15: Invoice Detail | 29 |
| Figure 16: New User..... | 32 |
| Figure 17: Employment Specialist Dashboard | 33 |
| Figure 18: Contract Manager's Dashboard | 35 |
| Figure 19: Change Provider..... | 36 |