FRANK D. LANTERMAN REGIONAL CENTER

eBilling system

eBilling Training

All Users

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All Users

Log In

1. Click the LAUNCH APPLICATION button.
2. Enter your User ID and Password
3. Click the LOGIN button.
4. If you do not have a User ID please contact your Regional Center.

REMINDER: Please change your password the first time you log in.

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System Information

Quick Facts

- ✓ **You will be prompted to change your password every ninety days.**
- ✓ **After twenty-five minutes of inactivity, you will be logged out of the system. Make sure to save all updates as you are making changes to avoid being logged out of the system and losing your work.**

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All Users

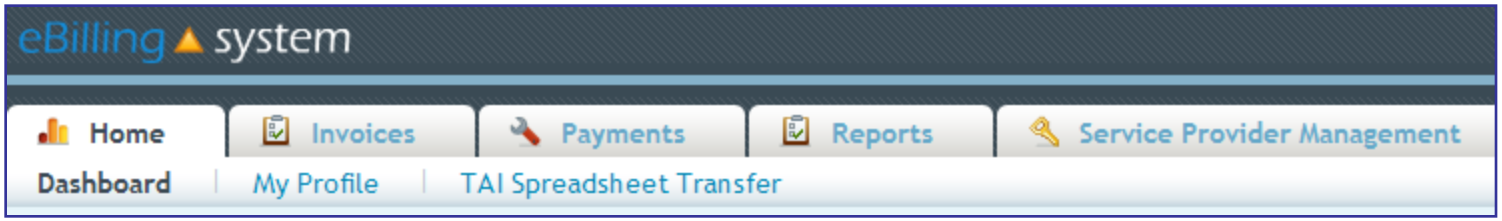
Home Tab

Dashboard

• The eBilling system is arranged in a series of tabs and sub tabs. To move from section to section click on the appropriate tab.

• Functions and tabs are available depending on your user role assignment. If you feel you are not able to access the appropriate areas, please contact your Regional Center and have them update your user role assignment.

• There is a help link in the upper right hand corner of each screen.



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All Users

User Roles

eBilling system

Vendor Administrator: Access to the *Home*, *Invoices*, *Payments*, *Reports*, and *Service Provider Management* tabs. The Vendor Administrator role only has access to assigned service provider numbers; can create other vendor user and reader profiles; is able to edit, update, and submit invoices.

Vendor Supervisor: Access to the *Home*, *Invoices*, *Payments*, and *Reports* tabs. The Vendor Supervisor role only has access to assigned service provider numbers; ***can not*** create other user profiles; and is able to edit, update, and submit invoices.

Vendor Staff: Access to the *Home*, *Invoices*, *Payments*, and *Reports* tabs. The Vendor Staff role only has access to assigned service provider numbers; ***can not*** create other user profiles; and is able to edit and update invoices. The Vendor Staff user profile is ***not able*** to submit invoices.

Vendor Staff – No Payment Access: Access to the *Home*, *Invoices*, and *Reports* tabs. The Vendor Staff – No Payment Access role only has access to assigned service provider numbers for invoices and invoice history and not payment history information; ***can not*** create other user profiles; and is able to edit and update invoices. The Vendor Staff – No Payment Access user profile is ***not able*** to submit invoices.

Reader: Access to the *Home*, *Invoices*, *Payments*, and *Reports* tabs. The Reader is only able to view information for assigned service provider numbers. The Reader is unable to update, delete, or submit invoices. The Reader is unable to create other user profiles.

If you feel that you have been assigned the incorrect role, please contact your Vendor Administrator or Regional Center Accounting Associate.

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All Users

Home Tab

My Profile

How to Update Your User Profile

1. Click the My Profile tab.
2. Make the desired changes.
3. Click UPDATE to save the changes.

This is the area where you are able to change your password. ***Please remember to reset your password the first time you log into the eBilling system.***

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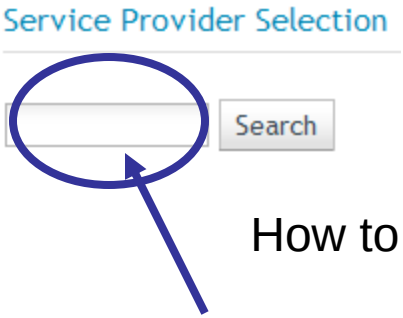
eBilling system

All Users

Home

Dashboard



How to Select a Service Provider Number (SPN)
(aka Vendor Number)

1. Type your SPN number (aka Vendor Number) in the Service Provider Selection search box.
2. Click SELECT.
3. A pop up box will appear. Click OK to approve your selection.

OR

1. Select the appropriate SPN number (by clicking on it once) from the SPN list located under the SPN search box.
2. A pop up box will appear. Click OK to approve your selection.

After selecting an SPN the selected service provider information will appear at the top of the screen.

You will be unable to view any information available under the invoices, payments, and reports tabs unless you first select an SPN number.

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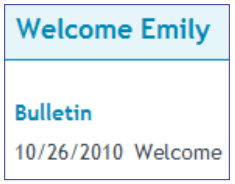
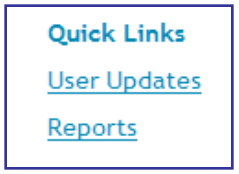
All Users

Home

Other Options



Bulletins are posted by the Regional Centers and will appear on the top left of the home screen.



Quick links are available on the home screen and provide one click access to other frequently used areas of the application.

E-Mail icon appears on the upper right corner of the screen and will allow you to send an e-mail to the designated Regional Center contact.

Attach Documents icon appears on the upper right corner of the screen and allows you to upload documents that the Regional Center will then be able to access.

Comments icon appears on the upper right corner of the screen and allows you to enter comments for the Regional Center to read.

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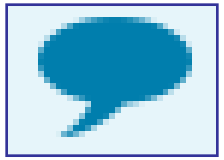
Home



Comments:

• The invoice level comments will be available on the website. Invoice detail line level comments will be transferred to UFS for Regional Center staff to view.

• Invoice detail line level comments are meant to convey important information to Accounting staff at the Regional Center (ex. This invoice line was deferred because…).

• Will be seen only by Regional Center Accounting staff.

• Should be kept brief (two sentences or less).

•Are not for communication with Service Coordinators.

• Are not an immediate or direct form of communication with the Regional Center. If you have a question or concern that requires an answer from the Regional Center, you need to either call or e-mail your Regional Center Accounting Associate.

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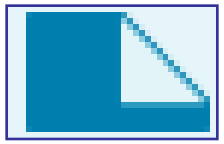
Home



Documents:

✓ Attached documents will only be flagged on Regional Center reports if they are attached to specific invoice detail lines.

✓Documents attached at the invoice level will not appear on Regional Center reports.

✓If you would like Regional Centers to know that you have attached a document to your invoice, it must be attached to an invoice detail line.

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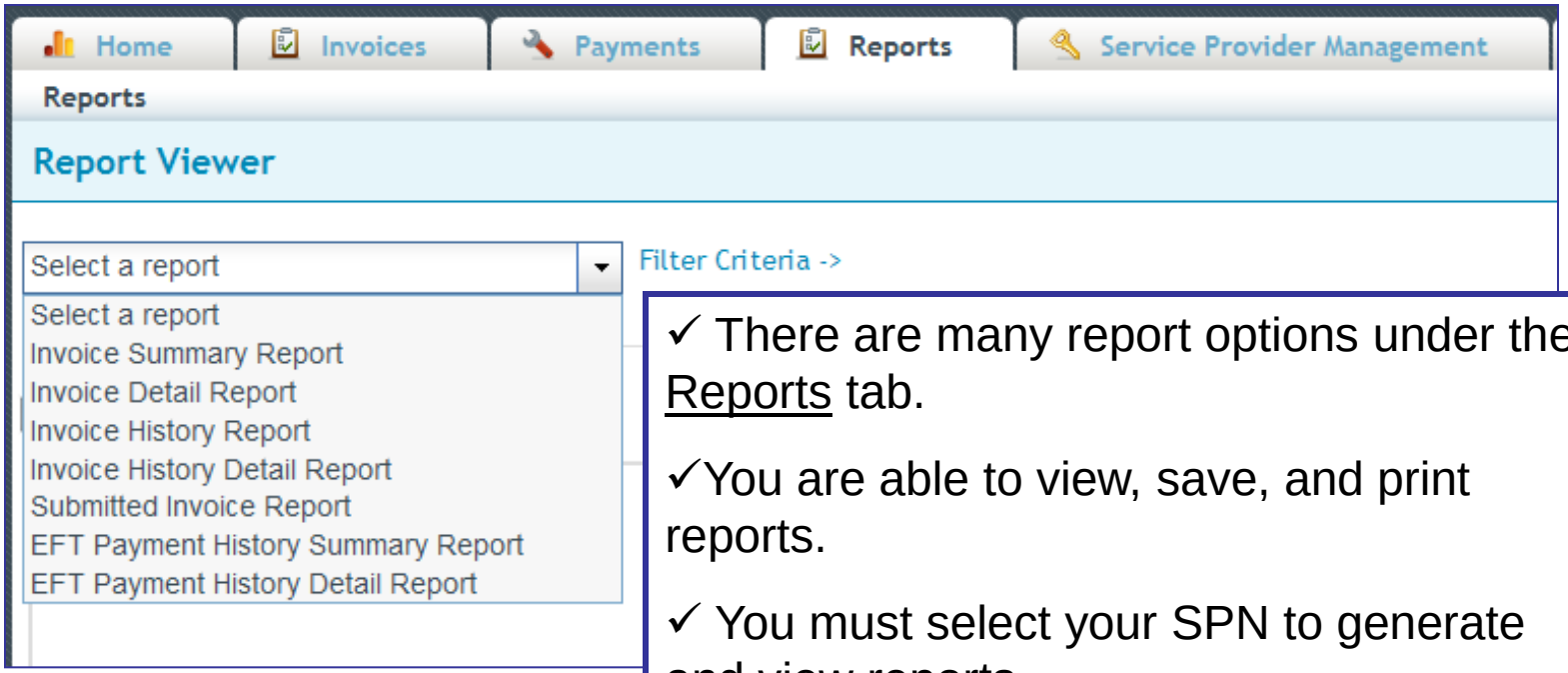
Reports

eBilling system

Reports

Overview



✓ There are many report options under the Reports tab.

✓You are able to view, save, and print reports.

✓ You must select your SPN to generate and view reports.

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Reports

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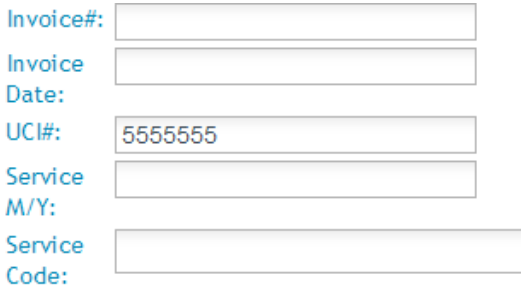
Reports

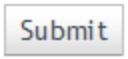
How to Generate a Report

1. Click the Reports tab. (Make sure you have selected the appropriate SPN).
2. Choose a report from the drop down menu on the left.
3. Enter the appropriate search criteria on the right hand side of the screen. (The search criteria will change depending on the report you've selected).
4. Click SUBMIT.

#1 Choose Report.



#2 Enter Search Criteria.



#3 Click Submit.

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Reports

eBilling system

Reports

Viewing and Printing Options

There are several options for viewing your report.

1. You can either print the report or save it to your computer.

Click this icon to print the report.

Click this icon to save the report to your computer.

2. You can open the report in a new window by clicking the Open in a New Window link that is located on the left side of the screen.

3. You can also use the scrollbar to view the report in the browser window.

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Please contact your Regional Center Accounting Associate with any additional questions.