ARKANSAS DEPARTMENT OF HUMAN SERVICES

Division of Children and Family Services Provider Invoice Entry (PIE) Website User Guide

Last revised July 8, 2020, for PIE 4.0.28

Contents

Introduction

This guide describes how to use the Arkansas Department of Human Services Provider Invoice Entry (PIE) website. PIE enables service providers with Division of Children and Family Services (DCFS) contracts to create, review and print invoices and perform other related activities.

This guide is for two groups of people who use PIE: Provider users and provider administrators. These terms also describe levels of access to the site. Provider administrators create new user accounts on behalf of a provider and help other users regain access to PIE when needed.

The guide is organized into three sections:

- User functions, which include activities such as logging in, changing your contact information and updating your password and security questions. These functions are available to all authorized users.
- Provider management functions, which include tasks such as invoicing, viewing placements and subproviders and reviewing board payments. These functions are also available to all authorized users.
- Administrator functions, which include adding other PIE users and helping them regain access to PIE. These functions are available only to provider administrators.

DCFS encourages providers to finalize and submit invoices for services provided during any calendar month by no later than the 10th day of the following month. For example, an invoice for November services should be submitted by December 10.

If you still have questions after reviewing this guide, please log in to PIE and click **Help/FAQ** to see related information. You can also click **Contact DCFS** on any PIE panel and complete the online form to ask questions, report issues and so forth. DCFS staff will respond as soon as possible.

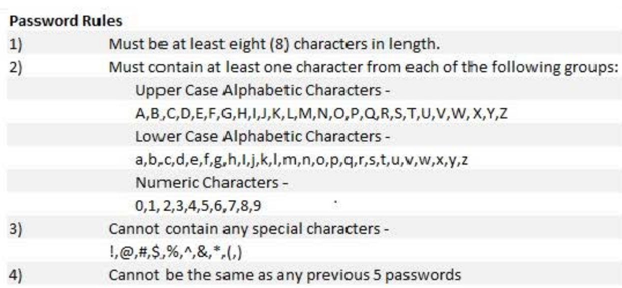
Section 1: User Functions

This section describes processes that all PIE users follow to activate their accounts, log in and manage their user profiles.

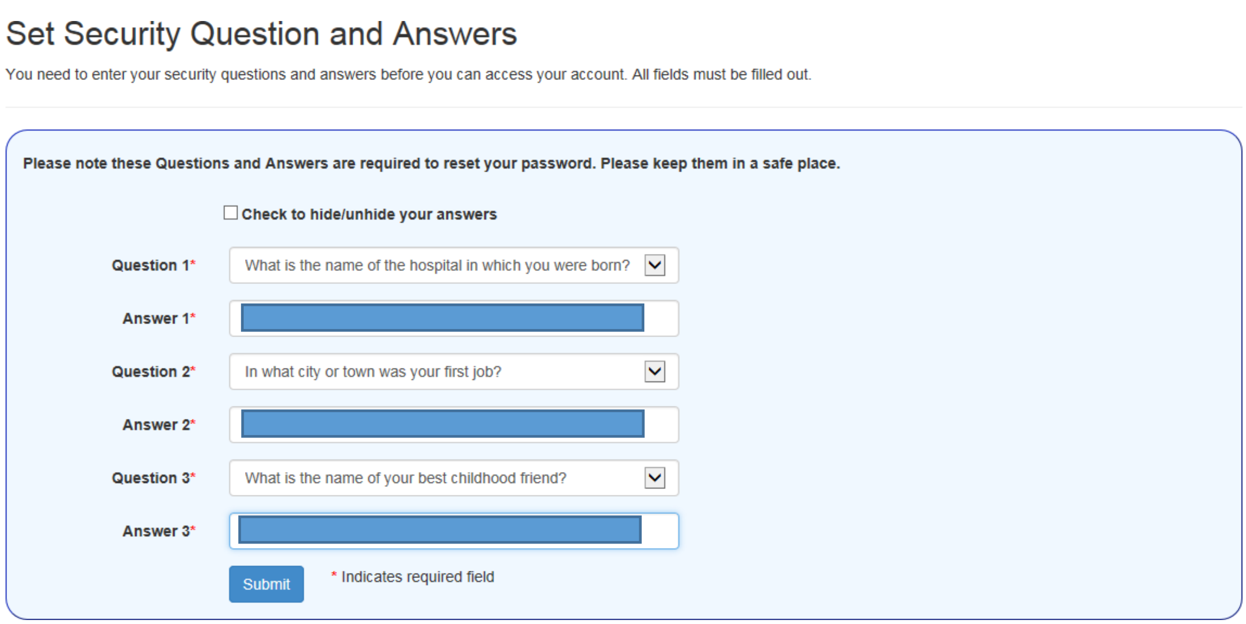
Activating Your PIE Account

New PIE users receive an email to activate their user accounts from their provider administrator, a person who works for the same service provider and manages PIE access.

1. In the email from the provider administrator, click the **Activate New User Link**. PIE's Activate User Account panel displays in your Web browser.



2. Enter the User Name noted in the email.
3. Create, enter and confirm a password that conforms to the rules on the panel.
4. Click **Set Password**. The Set Security Question and Answers panel displays.

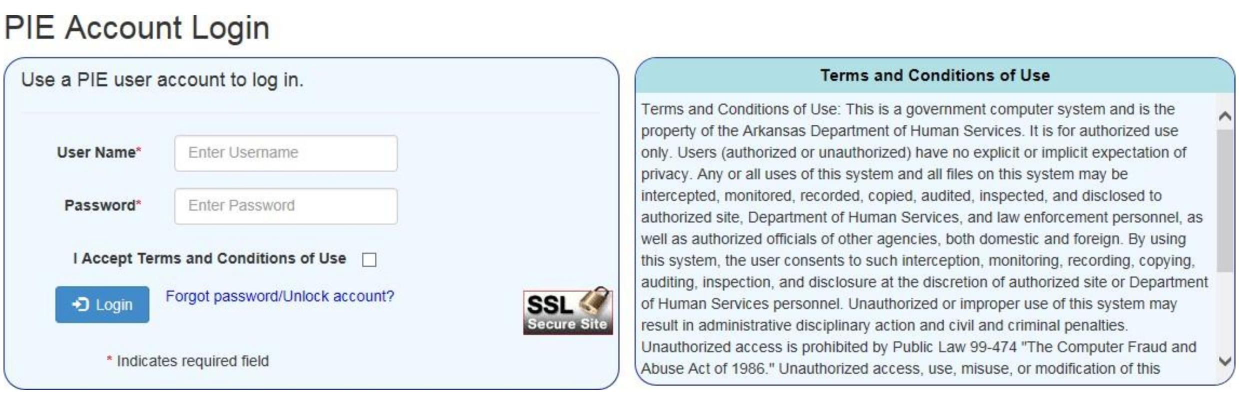


5. For each of the three questions, click the dropdown list to select a question. Choose questions with answers you'll remember without making notes.
6. Enter an answer to each question.
7. Click **Submit** or press **Enter**. A *Security Questions and Answers Saved Successfully!* message displays.

Logging in

Only authorized users may access PIE by entering information the on PIE Account Login panel. If you need access to PIE, contact your provider administrator—a person who manages PIE user access—or click Contact DCFS and complete the online form.

1. If needed, click **Login** to display the PIE Account Login panel.



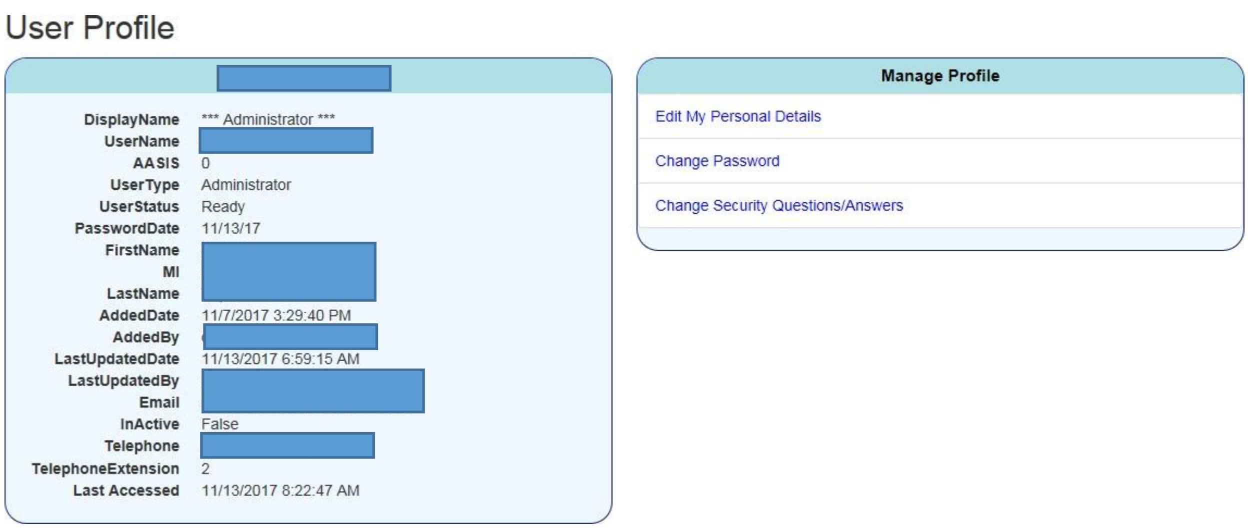
2. Enter your User Name, which was provided in your account activation email.
3. Enter your password or create one when you log in for the first time. PIE passwords must:
   - Be at least eight characters long
   - Contain at least one upper case letter, one lower case letter and one numeral
   - Differ from your five previous passwords if you're an established user
4. Read the Terms and Conditions of Use and click the checkbox for **I Accept Terms and Conditions of Use**.
5. Click **Login** or press **Enter** to display the Current User and Activity panels.

NOTE: As a security measure, PIE automatically logs out users after 25 minutes of inactivity. During the final minute, a warning message enables you to extend or cancel your session.

If you do get logged out, re-enter your User Name and Password to resume your work.

Managing Your User Profile

1. To display the User Profile panel, click **Home**, then **User Profile**.

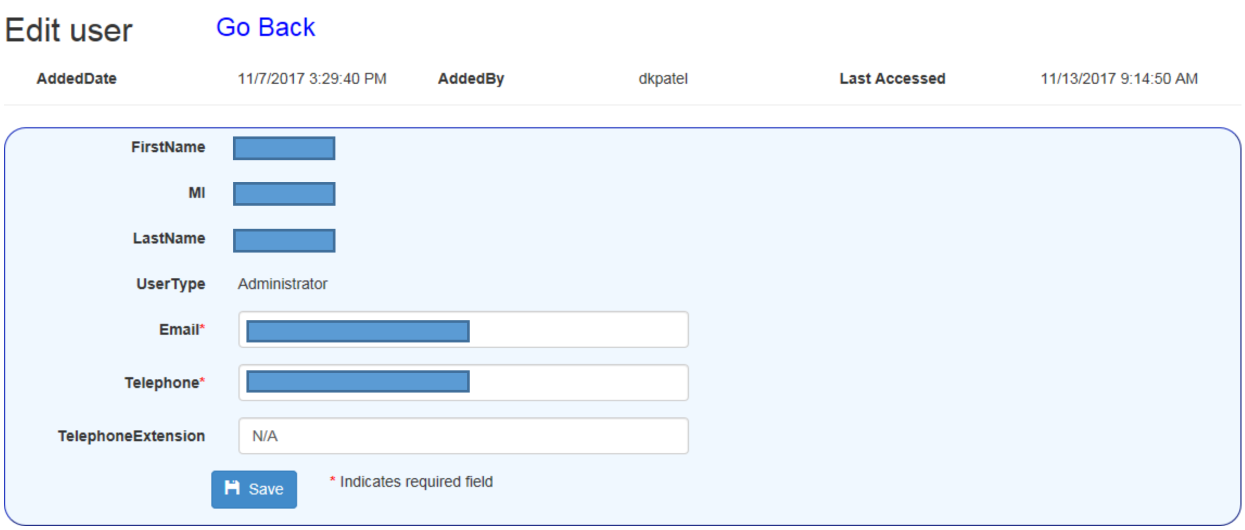


From this panel, you may change your:

- Email address, telephone number and extension, also known as your personal details
- PIE password
- Security questions and answers

Editing Your Personal Details

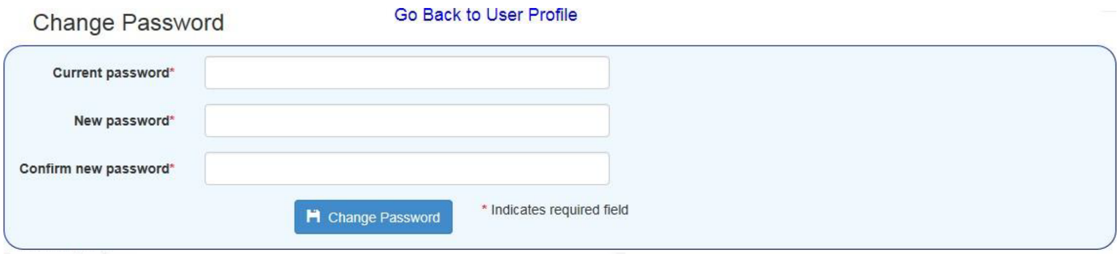
From the Manage Profile menu, click **Edit My Personal Details**. The Edit user panel displays.



1. Enter or update:
   – Email (required)
   – Telephone (required)
   – Telephone extension (optional)
2. Click **Save** or press **Enter**. A *User Updated Successfully!* message displays.
3. To redisplay the Manage Profile menu, click **Go Back**.

Changing Your Password

1. From the Manage Profile menu, click **Change Password** to display the Change Password panel.



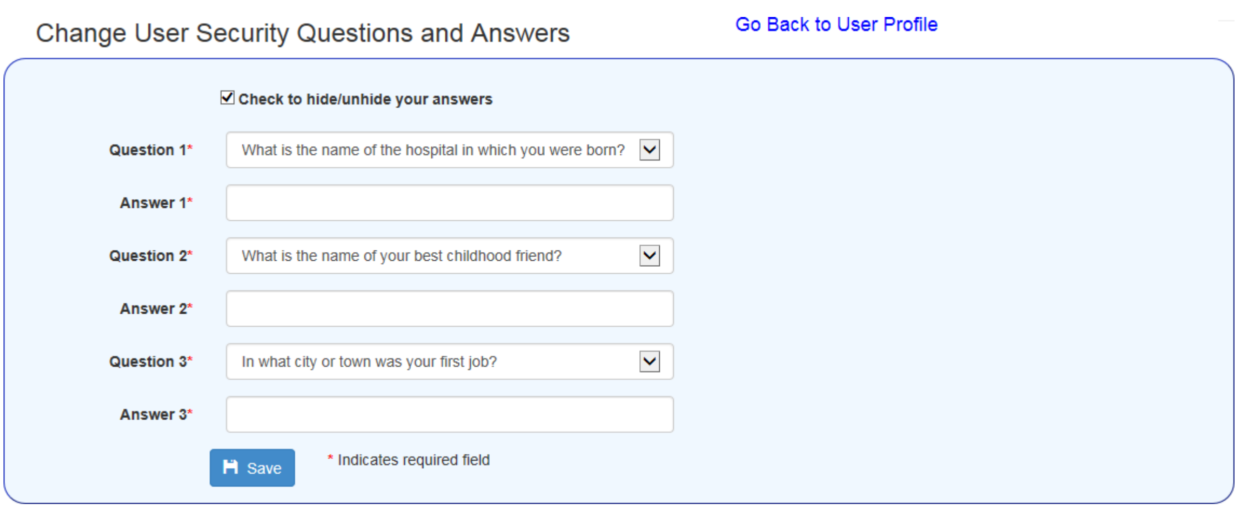
Password Rules

1)	Must be at least eight (8) characters in length.
2)	Must contain at least one character from each of the following groups:
	Upper Case Alphabetic Characters -
	A,B,C,D,E,F,G,H,I,J,K,L,M,N,O,P,Q,R,S,T,U,V,W,X,Y,Z
	Lower Case Alphabetic Characters -
	a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z
	Numeric Characters -
	0,1,2,3,4,5,6,7,8,9
3)	Cannot contain any special characters -
	!,@,#,$,%,^,&,*,(,)
4)	Cannot be the same as any previous 5 passwords

2. Enter your current password.
3. Enter and confirm your new password, ensuring it conforms to the rules on the panel.
4. Click **Change Password** or press **Enter**. A *Password Changed Successfully!* message displays.

Changing Your Security Questions and Answers

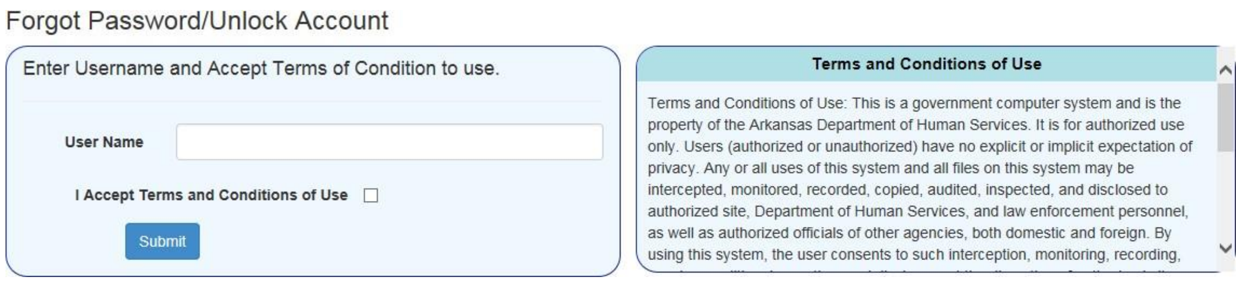
1. From the Manage Profile menu, click **Change Security Questions/Answers**. The Change User Security Questions and Answers panel displays.



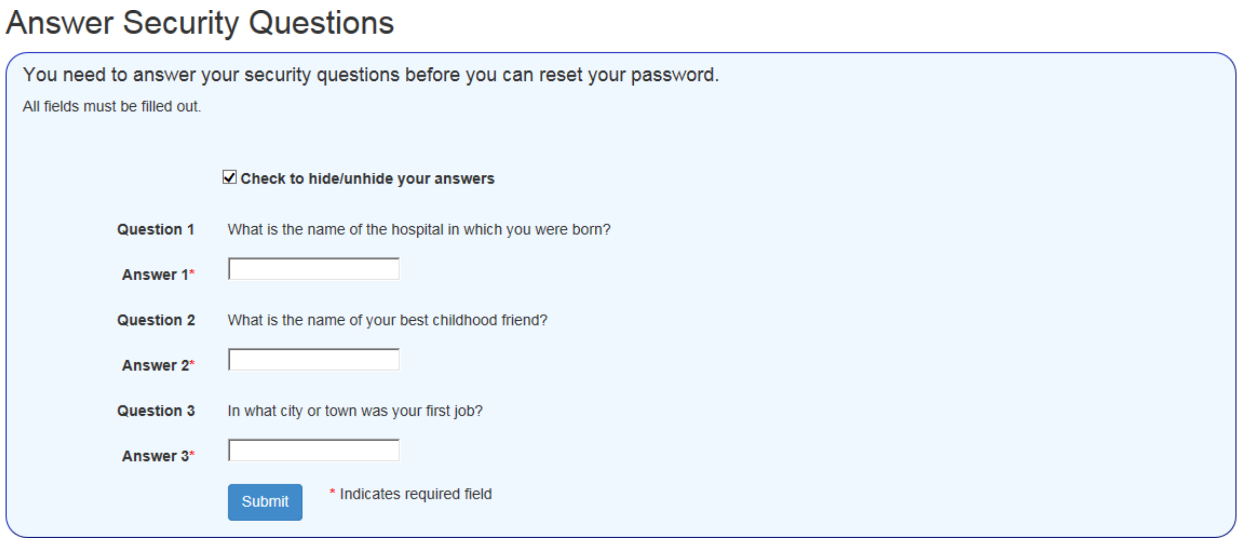
2. For each of the three questions, click the dropdown list to select a question. Choose questions with answers you'll remember without making notes.
3. Enter an answer for each question.
4. Click **Save** or press **Enter**. A Security Questions and Answers Saved Successfully! message displays.

Resetting Your Password

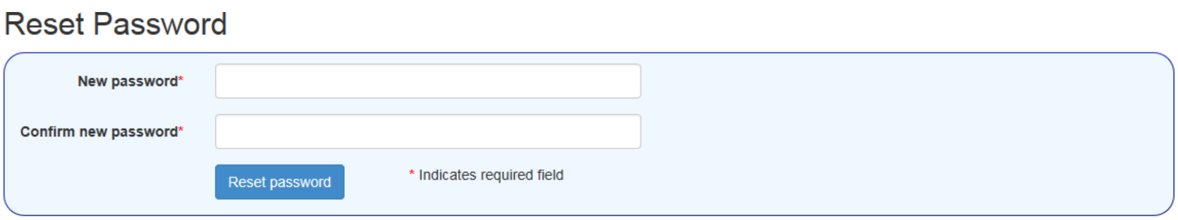
1. If your account becomes locked after you make three unsuccessful login attempts or forget your password, click **Forgot password/Unlock account?**. The Forgot Password/Unlock Account panel displays.



2. Enter your user name and click the **I Accept Terms and Conditions of Use** checkbox.
3. Click **Submit** or press **Enter**. The Answer Security Questions panel displays.



4. Enter an answer to each question, which you chose and answered in the past. By default, PIE masks the characters you type with dots. To display the actual characters, click the **Check to hide/unhide your answers** checkbox.
5. Enter an answer for each question, which you chose and answered in the past.
6. Click **Save** or press **Enter**. The Reset Password panel displays when all three answers are correct.

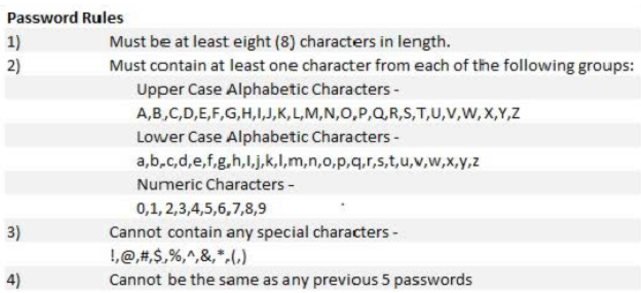

Reset Password

New password*

Confirm new password*

Reset password

* Indicates required field


Password Rules

1) Must be at least eight (8) characters in length.

2) Must contain at least one character from each of the following groups:

Upper Case Alphabetic Characters -
A,B,C,D,E,F,G,H,I,J,K,L,M,N,O,P,Q,R,S,T,U,V,W,X,Y,Z

Lower Case Alphabetic Characters -
a,b,c,d,e,f,g,h,I,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z

Numeric Characters -
0,1,2,3,4,5,6,7,8,9

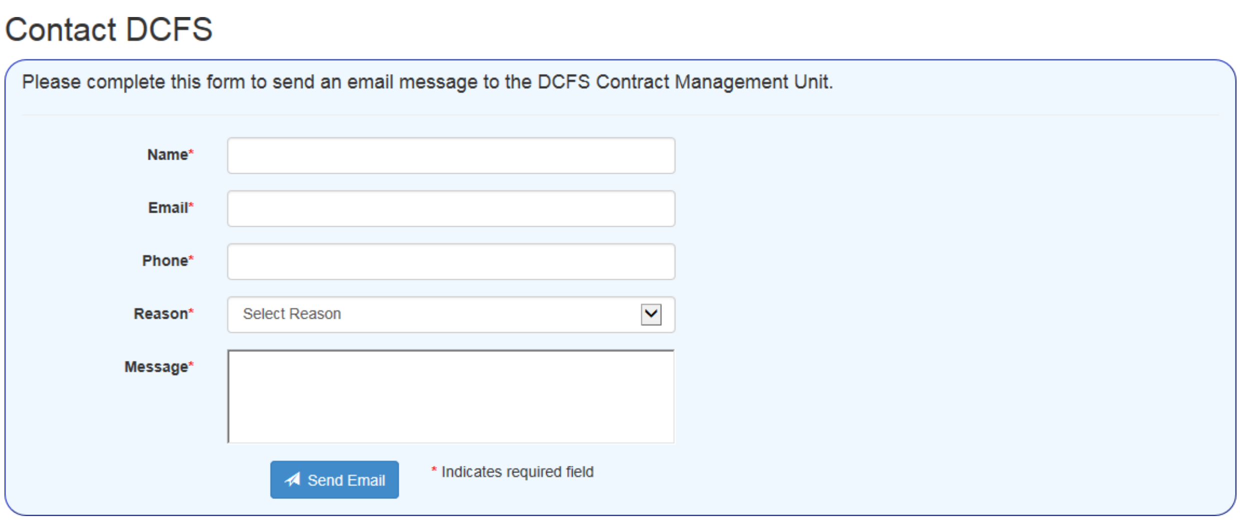
3) Cannot contain any special characters -
!,@,#,$,%,^,&,*,(,)

4) Cannot be the same as any previous 5 passwords

7. Create, enter and confirm a password that conforms to the rules on the panel.
8. Click **Reset Password** or press **Enter**. The Activity Panel for your service provider displays.

Contacting DCFS

The **Contact DCFS** link is available from every panel. It displays an online form for sending emails to a monitored inbox.


Contact DCFS

Please complete this form to send an email message to the DCFS Contract Management Unit.

Name*

Email*

Phone*

Reason* Select Reason

Message*

Send Email

* Indicates required field

The form includes your contact information, a text box for your message and a dropdown list to describe the communication:

– Comments
– Concerns/Problems
– Encumbrance Issues
– Logon Issues
– Placement Corrections
– Suggestions
– Web Application Issues
– Other

All fields are required. Click **Send Email** to complete the process.

Accessing Help/FAQ Information

A Help/FAQ link is available from every panel. It displays:

- A link to this user guide
- Tabs that overview PIE and list frequently-asked questions and answers about logging in, invoicing and general PIE usage.

PIE Notice Board

When you access PIE, a welcome panel that includes the Notice Board displays. DCFS encourages users to check the Notice Board daily for important information, such as announcements about upcoming and new versions of PIE, from the Contracts Management team.

To check it after you've already logged in, click on the **PIE version number/Notice Board** link in the upper left area of any panel.

Section 2: Provider Management Functions

This section describes common processes in PIE performed by provider users and administrators, including:

- Invoicing – creating new invoices and viewing, editing and deleting invoices
- Viewing placements and board payments
- Viewing information about subproviders (for master providers only)

Invoicing and Using the Program List Panel

PIE users can create, edit, view, delete, verify, approve and print invoices from the Invoice Management Panel.

The exact path you take to that panel depends on factors that include the range of contracted services and whether your provider is a master provider. The following outlines show the first steps you'll take in one of two paths to the Invoice Management Panel.

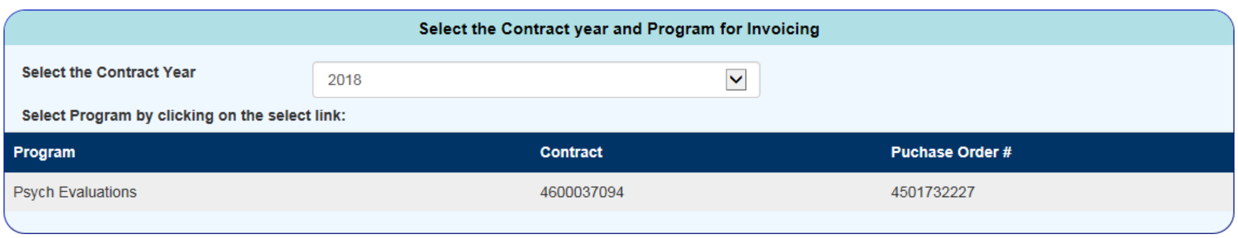
If your provider offers fewer services or only non-placement services:

- Log in in to display the Activity Panel.
- Click **Invoice Management** to display the Program List Panel.
- Select a program to display the Invoice Management Panel.

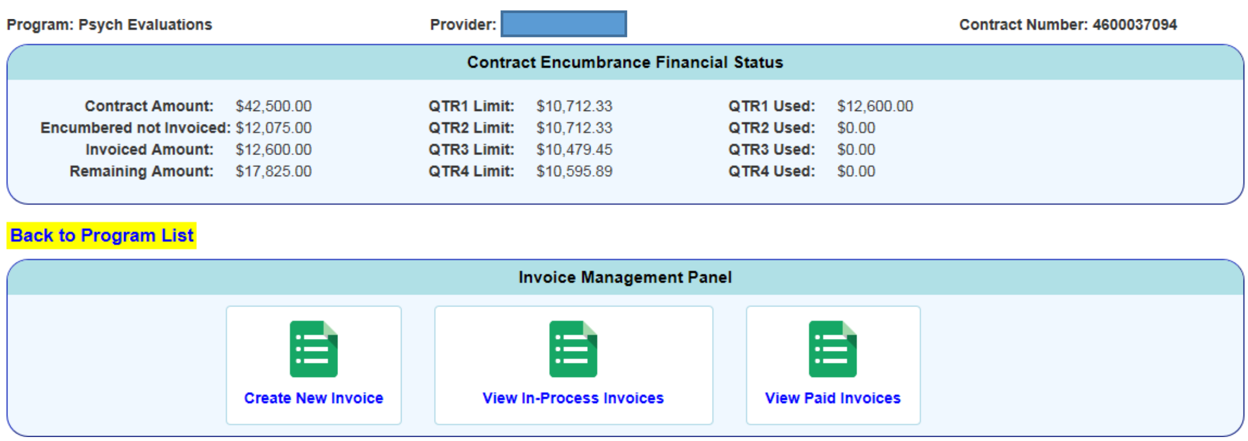
If your provider offers multiple services, including certain types of placements:

- Log in to display the Activity Panel.
- Click **Invoice Management** to display the Provider Management Panel.
- Click **Invoicing** to display the Program List Panel.
- Select a program to display the Invoice Management Panel.

How to use the Program List Panel



1. On the Program List Panel, select a contract year from the **Select the Contract Year** dropdown list. PIE defaults to the current state fiscal year. Your provider's programs (services), contracts and purchase orders display.
2. Click on a program, contract or purchase order to display the Invoice Management Panel and encumbrance status information.



The Contract Encumbrance Financial Status includes the total amount of the contract, amount encumbered but not yet invoiced and the dollar amounts invoiced and remaining. It also breaks down quarterly limits and amounts used.

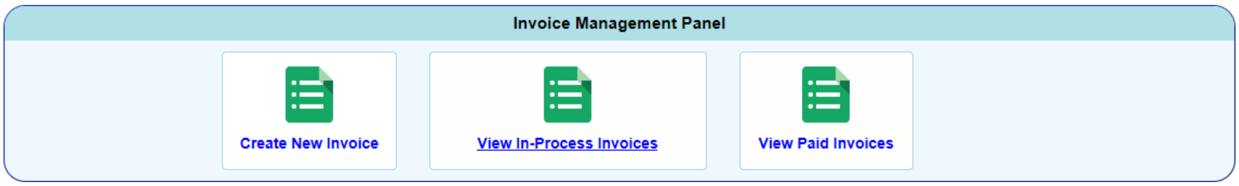
From the Invoice Management Panel, you can:

- Create a new invoice
- View in-process invoices and edit or delete invoices that haven't yet been approved
- View paid invoices

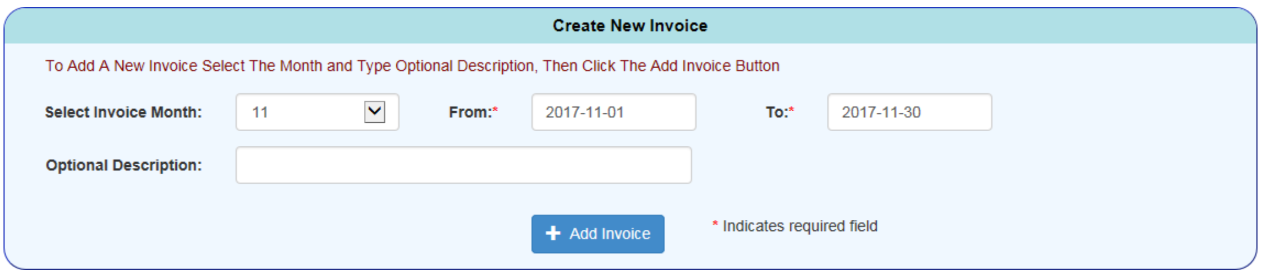
The steps for each of those processes appear, respectively, in the following sections.

Creating a New Invoice

The following steps describe how to create a new invoice and assume you're starting from the Invoice Management Panel.



1. Click **Create New Invoice** to display the Create New Invoice panel.



2. Select an invoice month from the dropdown list, which automatically enters the first and last days of the selected month. You can modify the dates to cover any period of days within the selected month.

   A user-defined description of up to 80 characters is optional.

3. Click **Add Invoice**. A message that includes a system-generated invoice name displays to confirm a successful transaction.

   Even if you don't add a description, the invoice naming convention, **CFMMYYaaaannn**, describes it:

   - **CF** = A constant for Children and Family
   - **MM** = Two-character month
   - **YY** = State fiscal year; for example, 17 for 2017
   - **aaaa** = Program abbreviation (EMRS for emergency shelter, for example)
   - **nnn** = System-assigned sequence number

   NOTE: The next panel that displays depends on the service associated with your new invoice:

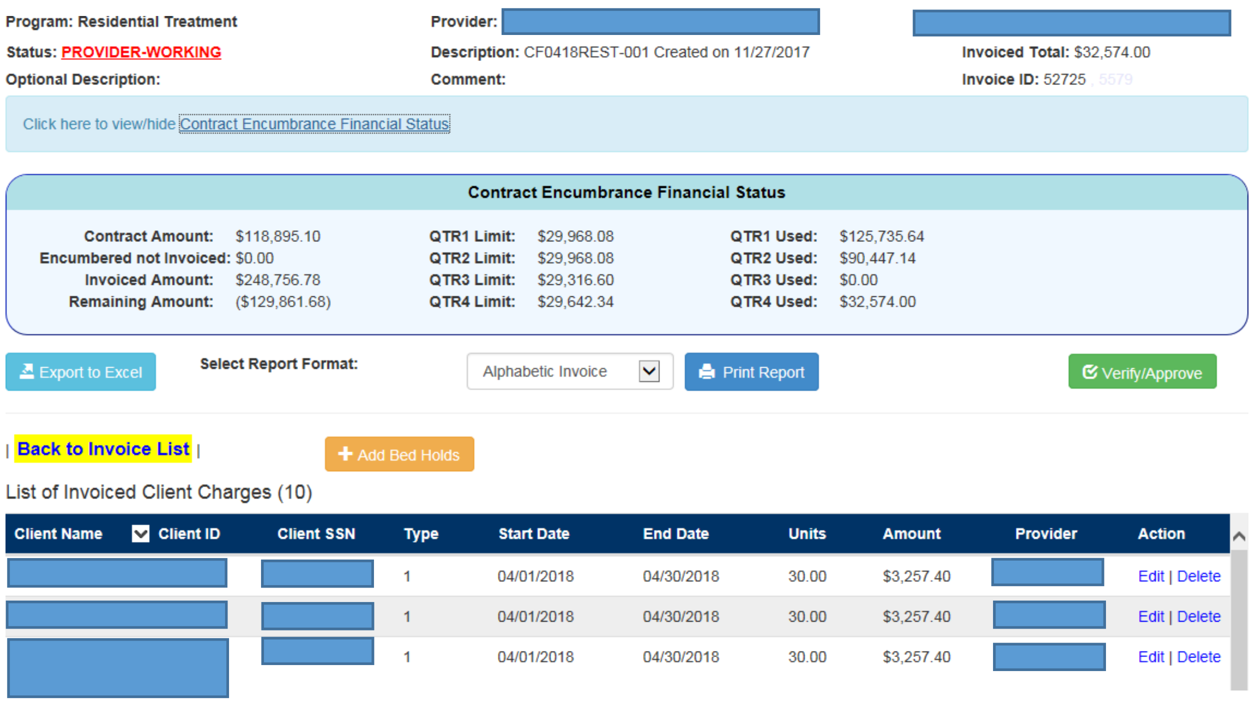
   - PIE automatically populates the invoice with the names of clients who have been keyed in CHRIS to a specific program service with a specific provider. Those clients' names display on the List of Invoiced Client Charges.

- For CRT and DDS services, you manually add clients to the invoice. See subsection B for those steps.

A – Invoicing for CHRIS Placements

If the invoice is for CHRIS placements, such as emergency shelter or SRP residential treatment, the List of Invoiced Client Charges panel displays after you click Add Invoice.

PIE automatically populates the invoice with the names of clients who have been keyed in CHRIS to a specific program service with a specific provider. Those clients' names display on the List of Invoiced Client Charges.



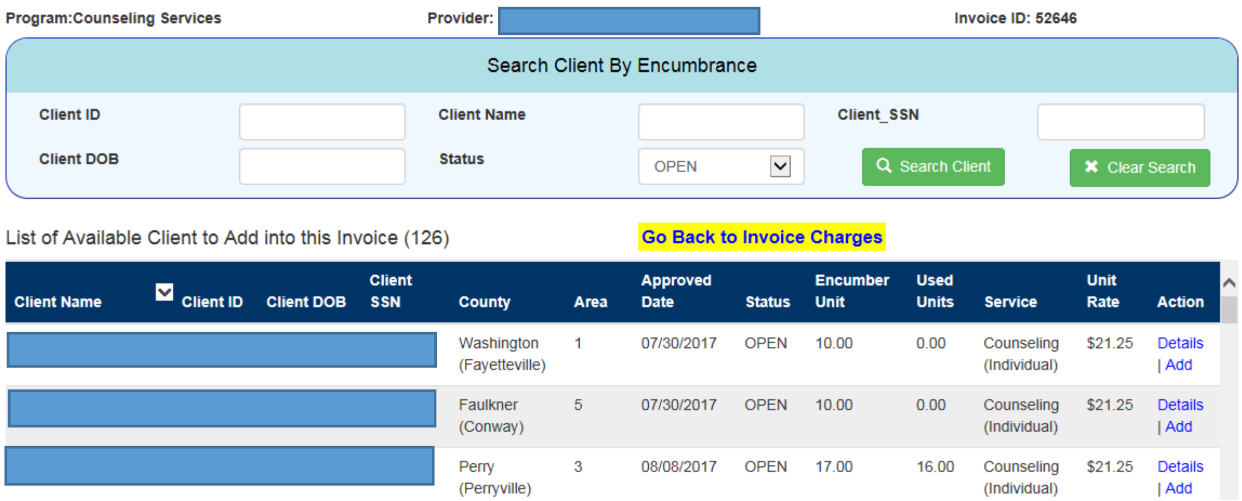
1. You can complete the following tasks from this multi-function panel:
   - View or hide the **Contract Encumbrance Financial Status**, which shows the contract amount, encumbered amount not yet invoiced, invoiced amount, remaining encumbrance and a breakdown of quarterly limits and amounts used.
   - To sort the list by any column, click on its name and then click the arrow that displays to the right of the column name.
   - Select a format in the dropdown list for **Select Report Format**:
     - Alphabetic Invoice
     - Area/County Invoice
     - Service Group Invoice
   - Click **Print Report** to print the list. See *Printing Reports* for details.
   - Click **Export to Excel** to render the list to an Excel (.xls) file.
   - Click **Add Bed Holds** to add a bed hold for one or more selected clients. See *Adding Bed Holds* for details.
2. To edit or delete charges on the invoice for a client selected from the list:
   - Click **Edit**, change the selected client's start and/or end dates for the service and click **Edit Charge** to complete the process. The updated List of invoiced Client Charges displays.

- Click **Delete** to remove a charge from the invoice for a selected client. A confirmation message displays to ensure you want to complete the process.

3. Once all charges are adjusted and verified, click **Verify/Approve** to display the Verify and Approve Invoice panel. See *Verifying and Approving Invoices* for details.

B – Invoicing for Encumbered and Non-placement Services

When your new invoice is for encumbered services, the List of Available Clients to Add into this Invoice panel displays.


Program:Counseling Services   Provider: Invoice ID: 52646

Search Client By Encumbrance

Client ID   Client Name   Client_SSN
Client DOB   Status OPEN   Search Client   Clear Search

List of Available Client to Add into this Invoice (126)   Go Back to Invoice Charges

Client Name	Client ID	Client DOB	Client SSN	County	Area	Approved Date	Status	Encumber Unit	Used Units	Service	Unit Rate	Action
				Washington (Fayetteville)	1	07/30/2017	OPEN	10.00	0.00	Counseling (Individual)	$21.25	Details | Add
				Faulkner (Conway)	5	07/30/2017	OPEN	10.00	0.00	Counseling (Individual)	$21.25	Details | Add
				Perry (Perryville)	3	08/08/2017	OPEN	17.00	16.00	Counseling (Individual)	$21.25	Details | Add

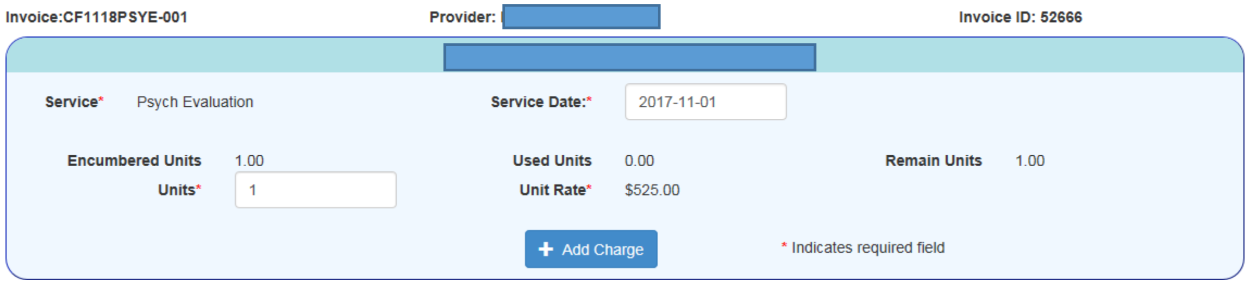
The two parts of this panel interact. To use the Search Client By Encumbrance function:

1. Find a specific client by entering a search parameter: Client ID, name, Social Security number or date of birth.
2. Find clients with available encumbrances in a specific status. In the dropdown list for **Status**, select one of the following values:
   - All
   - Open
   - Used
   - Closed
3. Click **Search Client** to apply your search parameter or filter to the List of Available Client to Add into this Invoice. The list redisplays.

   If needed, you can now:

   - Sort the list by any column. Click on its name and then click the arrow that displays to the right of the column name.
   - Click **Details** to view past charges for an encumbrance for a selected client.

4. To add charges for a selected client, click **Add** under the Action column. The Add Charges panel displays.



5. If the service date isn't the same date you add the charge, click into the **Service Date** box to display a calendar tool. Select a date to populate the box.
6. After reviewing the remaining units, enter a number in **Units**.
7. Click **Add Charge**. A List of Invoiced Client Charges for the client displays.
8. As needed, click **Back to Available Client List** to select more clients and charges to add to the new invoice.

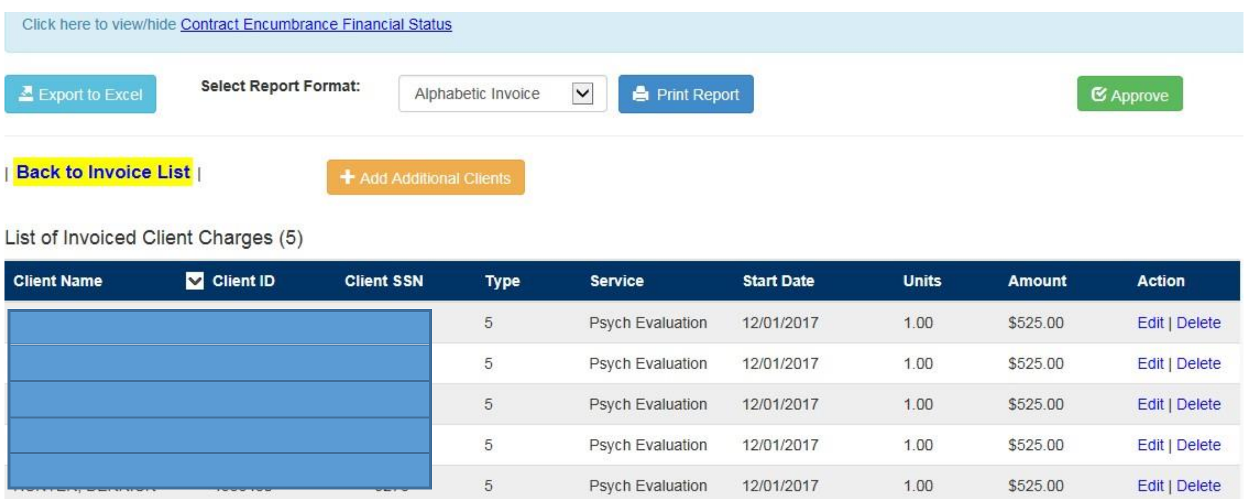
Back to Available Client List

List of Invoiced Client Charges (3)

Client Name	Client ID	Client SSN	Type	Service	Start Date	Units	Unit Rate	Amount	Action
[redacted]			5	Psych Evaluation	12/01/2017	1.00	$525.00	$525.00	Delete
[redacted]			5	Psych Evaluation	12/01/2017	1.00	$525.00	$525.00	Delete
[redacted]			5	Psych Evaluation	12/01/2017	1.00	$525.00	$525.00	Delete

NOTE: To remove a charge, click **Delete**. A message displays to verify you want to continue with the action. Click **OK** to delete the charge. When the List of Invoiced Client Charges redisplays, the charge you just deleted is no longer on the invoice.

9. To review all the added charges and clients, follow the **Back to Available Client List** and **Go Back to Invoice Charges** links to display the List of Invoiced Client Charges panel.



List of Invoiced Client Charges (5)

Client Name	Client ID	Client SSN	Type	Service	Start Date	Units	Amount	Action
[redacted]			5	Psych Evaluation	12/01/2017	1.00	$525.00	Edit | Delete
			5	Psych Evaluation	12/01/2017	1.00	$525.00	Edit | Delete
			5	Psych Evaluation	12/01/2017	1.00	$525.00	Edit | Delete
			5	Psych Evaluation	12/01/2017	1.00	$525.00	Edit | Delete
			5	Psych Evaluation	12/01/2017	1.00	$525.00	Edit | Delete

From this panel, you can perform multiple functions:

- View the status of this invoice. Statuses are:
  - Provider-Working – The invoice has been created, but it hasn't been approved yet.
  - Provider-Approved – The provider has approved the invoice.

- Provider-Returned – DCFS has rejected or denied the invoice in the CFM system and sent it back to the provider for corrections.
- Supervisor Approved – The invoice has been approved by DCFS supervisors for the encumbered services.
- OCS Approved – The Office of Community Support (OCS) has approved the invoice. (This status doesn't apply to all contract services.)
- OFA Approved – The office of Finance and Administration has approved the invoice. (This status doesn't apply to all contract services.)
- Paid – The invoice has gone through all approvals and has been paid. It can no longer be edited.

NOTE: Once an invoice has been approved at any level, it can no longer be edited.

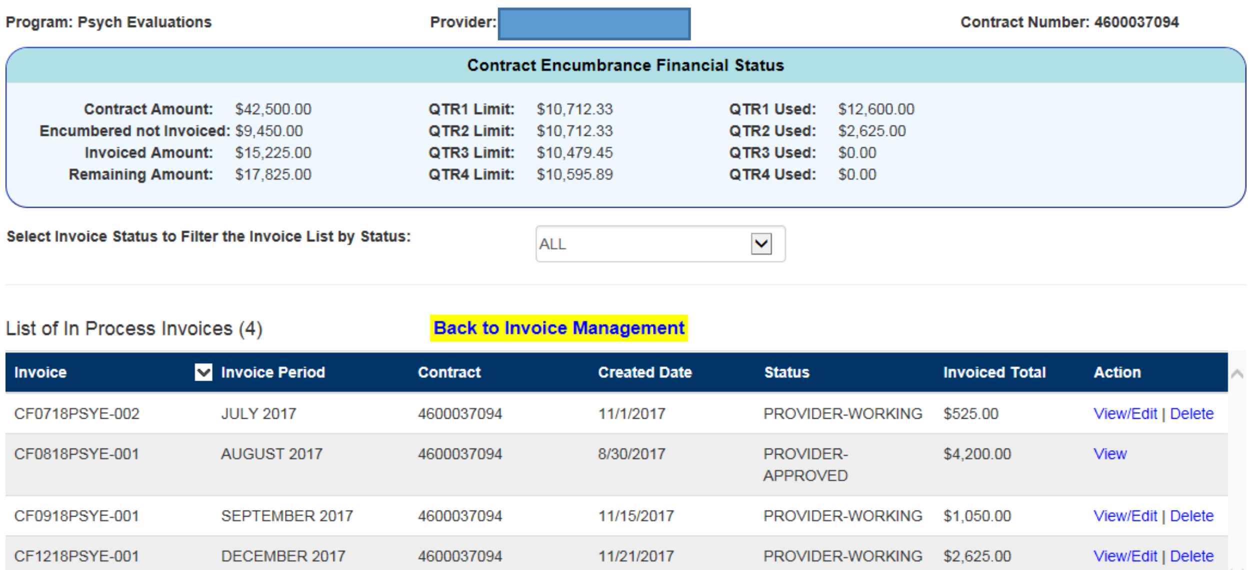
- Click **Add Additional Clients** to add more clients and their charges to this invoice.
- View or hide the **Contract Encumbrance Financial Status**, which shows the contract amount, encumbered amount not yet invoiced, invoiced amount, remaining encumbrance and a breakdown of quarterly limits and amounts used.
- Sort the list by any column. Click on its name and then click the arrow that displays to the right of the column name.
- Select a format in the dropdown list for **Select Report Format**:
  - Alphabetic Invoice
  - Area/County Invoice
  - Service Group Invoice
- Click **Export to Excel** to render the list to an Excel (.xls) file.
- Click **Print Report** to print the list. See Printing Reports for details.

10. If you're authorized to approve invoices, click **Approve**. An Invoice Approved successfully message displays to complete the process.

Viewing, Editing or Deleting In-Process Invoices

The following steps describe how to view, edit or delete invoices before they've been paid. The available functions depend on an invoice's status.

1. From the Invoice Management Panel, click **View in-Process Invoices** to display the List of in Process invoices panel for the year and program you selected on the Program List panel.



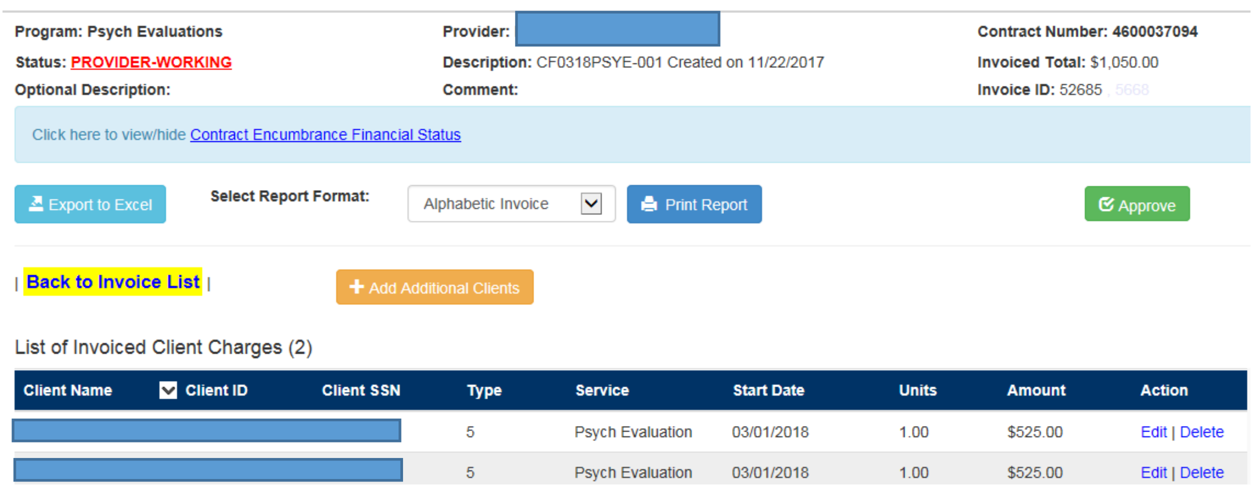
From this panel, you can:

- View the status of the encumbrance for the contract you selected.
- View, edit or delete invoices in any status other than Approved.
- View invoices in various states of approval.

NOTE: The links in the Action column for each invoice indicate the available actions.

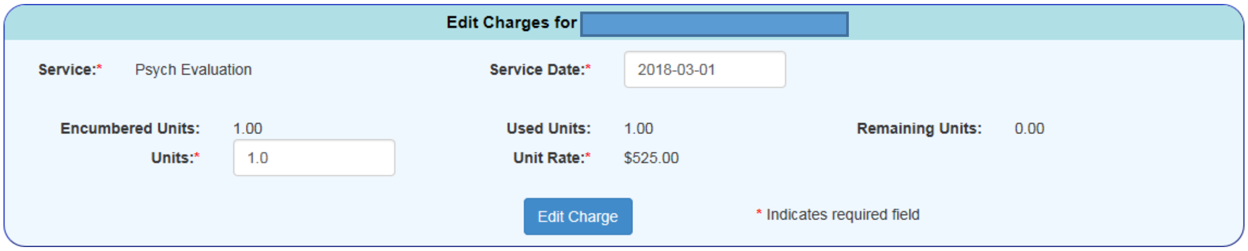
Viewing or Editing an In-process Invoice

2. Click **View/Edit** to display the List of Invoiced Client Charges panel. If all you need to do is view the client charges on this invoice, you can navigate away from this panel with **Home** links or click **Back to Invoice List** when you're through.



3. To edit the invoice, you can:
   - Click **Add Additional Clients** to display the List of Available Clients to Add to this Invoice panel. See details for using this panel in *Creating a New Invoice*, section *B*.
   - Click **Delete** in the Action column to delete a charge for a specific client. A message displays to confirm the action, and the List of Invoiced Client Charges panel redisplays to show the charge has been deleted.

- You can also edit the invoice by editing individual charges. Click **Edit** in the Action column for a selected client to display the Edit Charges panel.



4. Change the **Service Date** and/or number of **Units** fields and click **Edit Charge** to complete the process. The List of Invoiced Client Charges panel redisplays to show your change.

NOTE: The List of Invoiced Client Charges panel offers the following functions in addition to viewing and editing an invoice:

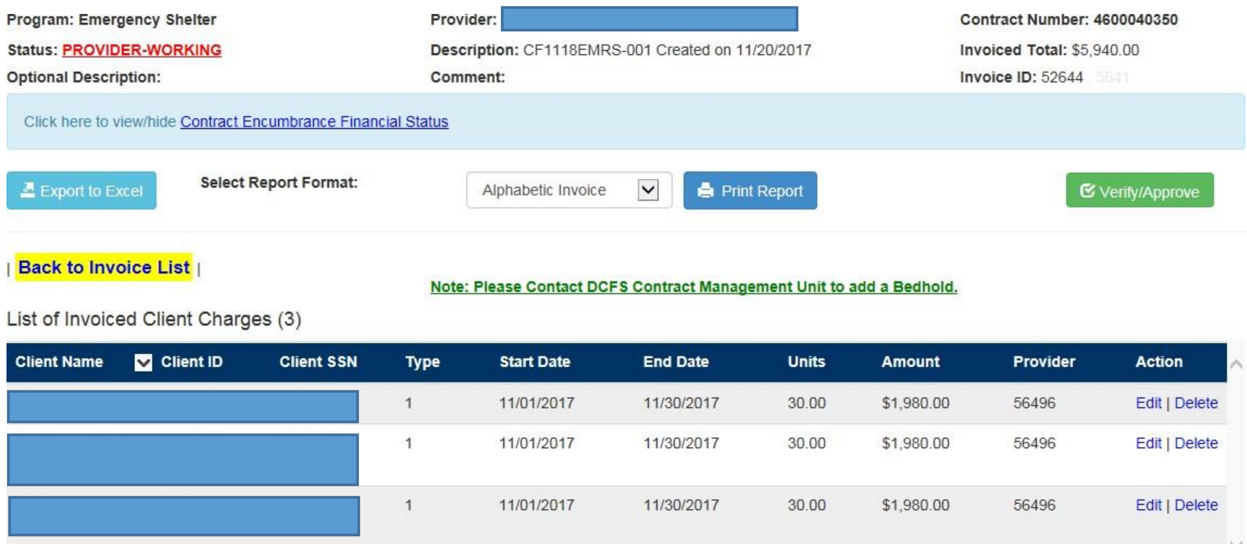
- Click **Export to Excel** to render the list to an Excel (.xls) file.
- Format the list for review by selecting one of the following options from the **Select Report Format** dropdown list:
  - Alphabetic invoice
  - Area/County Invoice
  - Service Group Invoice
  - Encumbrance List
- Sort the list by any column. Click on its name and then click the arrow that displays to the right of the column name.
- Click **Print Report** before or after formatting. See *Printing Reports* for details.
- Click **Approve** to approve the invoice.

Approving Invoices

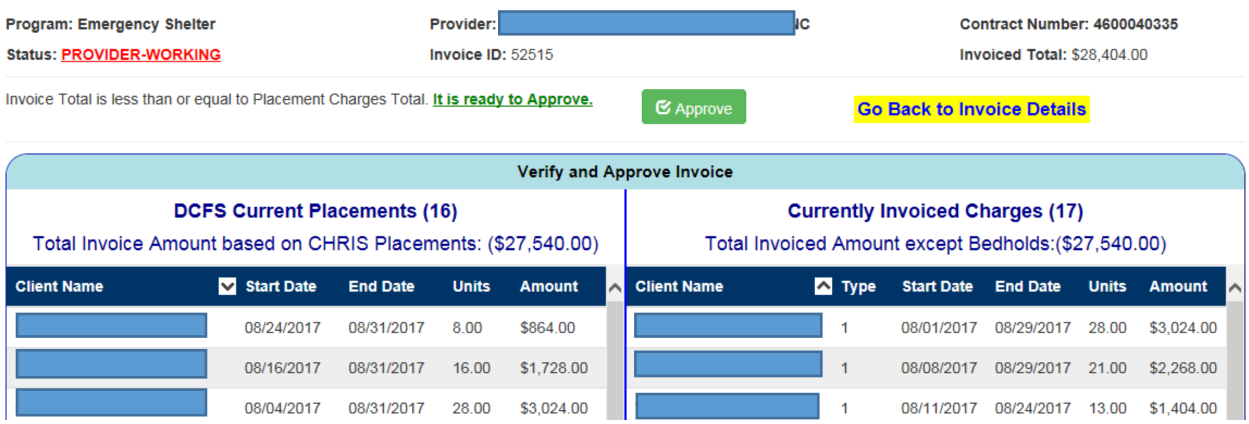
The process for approving invoices is straightforward, but the steps differ slightly between invoices for CHRIS placements vs. invoices for encumbered and non-placement services. CHRIS placements involve an additional panel.

A – Approving Invoices for CHRIS Placements

1. Navigate to the List of Invoiced Client Charges panel for a CHRIS placements invoice you need to verify and approve.



2. Click **Verify/Approve** to display the Verify and Approve Invoice panel.



3. Review the placements and charges. To sort the list by any column, click on its name and then click the arrow that displays to the right of the column name.

   If your review results in needed changes, click **Go Back to Invoice Details** to edit or delete charges or add bed holds.

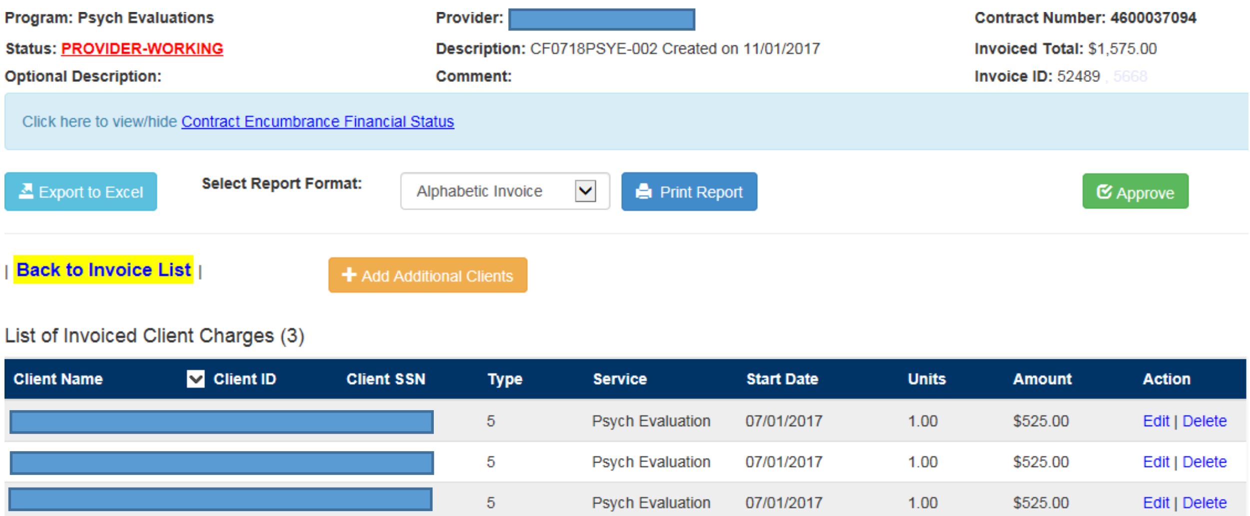
   NOTE: When Currently Invoiced Charges exceed the allowable DCFS Current Placements charges, the Approve button doesn't display. PIE highlights the clients and charges that differ on both sides of the panel to help you find the differences, which you can reconcile by editing the invoice.

   For related information, see the Invoicing tab on PIE's Help/FAQ panel. It includes a question about using the Verify and Approve Invoice panel to add a new placement services client to an invoice after it was first created.

4. When you've verified the invoice and reconciled any differences so that the Approve button displays, click **Approve**. An *Invoice Approved successfully* message displays, and the invoice's status changes to PROVIDER-APPROVED.

B – Approving Invoices for Encumbered and Non-placement Services

1. Navigate to the List of Invoiced Client Charges panel for a CRT or DDS services invoice you need to verify and approve.

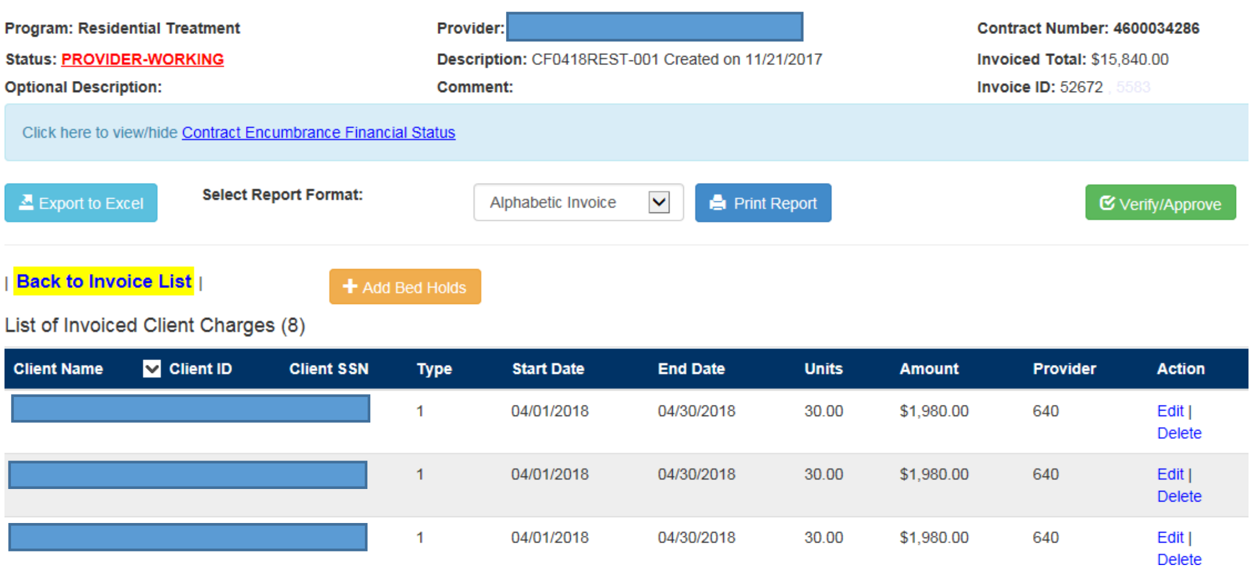


2. Review the charges. If needed, click **Add Additional Clients** or use the **Edit** function to edit charges for selected clients.
3. When you've verified the invoice, click **Approve**. An *Invoice Approved successfully* message displays, and the invoice's status changes to PROVIDER-APPROVED.

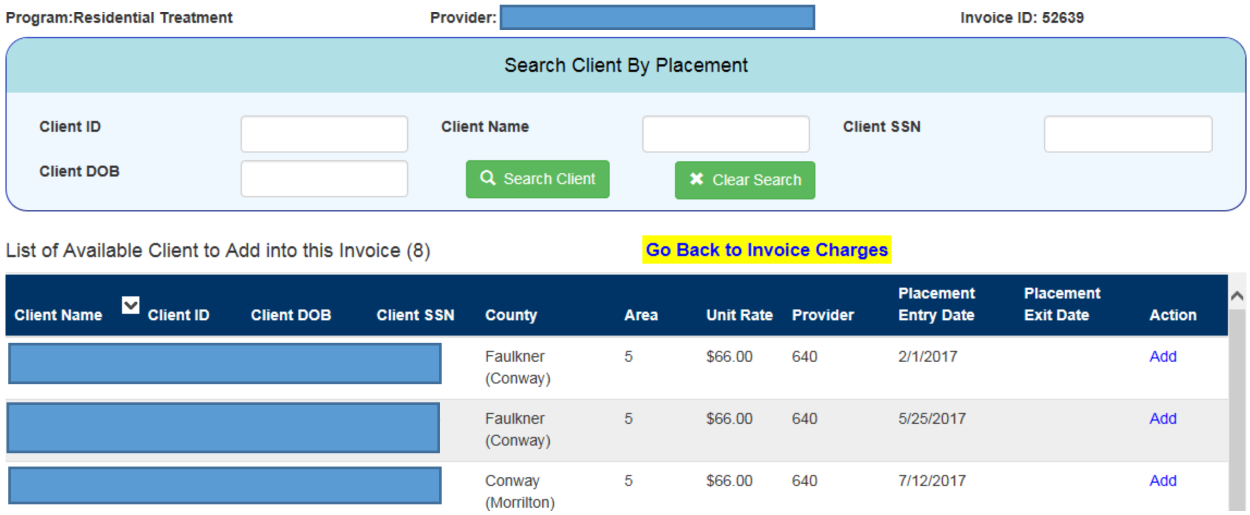
Adding Bed Holds

If your provider's contracts include certain types of CHRIS placements, you can add bed holds to client charges.

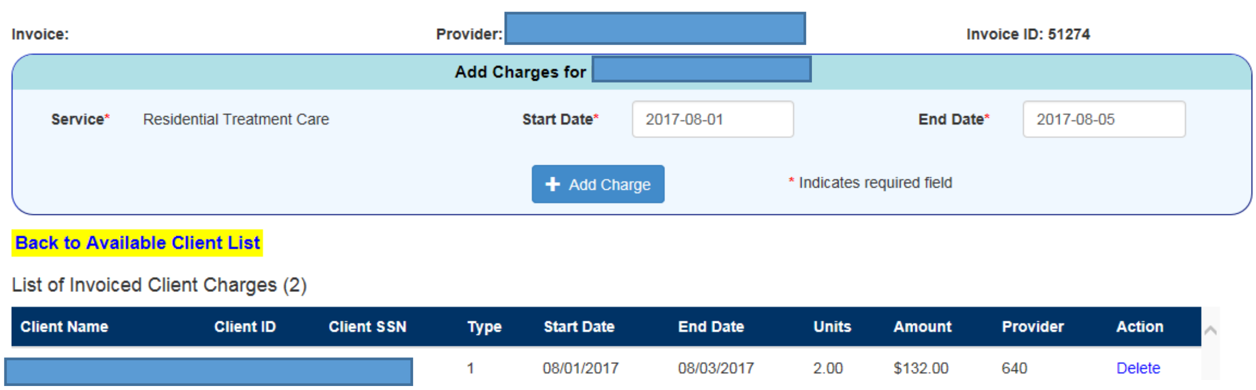
1. Navigate to the List of Invoiced Client Charges panel for a selected invoice.



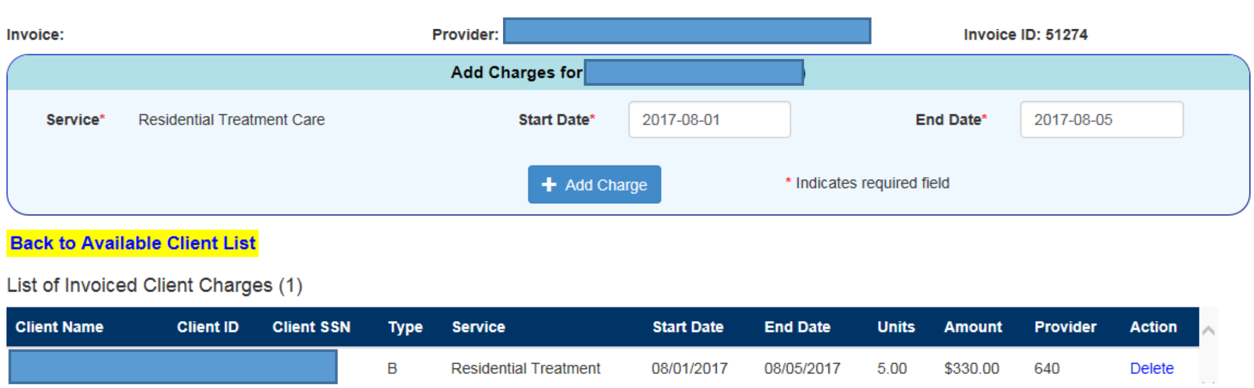
2. Click **Add Bed Holds** to display the List of Available Client to Add into this Invoice panel.



3. If needed, enter a **Client ID**, **Name**, **SSN** or **DOB** and click **Search Client**. You can also scroll through the listed clients.
4. Click **Add** in the Action column for the selected client. The Add Charges panel displays.



5. Click into the **Start Date** and **End Date** text boxes to display a calendar tool and select start and end dates for the bed hold. DCFS policy limits bed holds to no more than 10 days.
6. Click **Add Charge** to add the bed hold. The List of Invoiced Client Charges panel displays to show the charge for the added bed hold.



Viewing Paid Invoices

The following steps describe how to view paid invoices. You cannot edit or delete an invoice after it's been paid or is in any status other than Provider-Working or Provider-Returned.

1. Navigate to your provider's Program List Panel and select a contract year and program to display the Invoice Management Panel.

Invoice Management Panel

Create New Invoice | View In-Process Invoices | View Paid Invoices

2. Click **View Paid Invoices** to display the List of Paid Invoices panel for the year and program you selected on the Program List panel.

Program: Residential Treatment **Provider:** [redacted] **Contract Number: 4600034292**

Contract Encumbrance Financial Status

Contract Amount:	$308,497.99	**QTR1 Limit:**	$77,758.40	**QTR1 Used:**	$79,480.56
Encumbered not Invoiced:	$0.00	**QTR2 Limit:**	$77,758.40	**QTR2 Used:**	$52,009.82
Invoiced Amount:	$258,094.66	**QTR3 Limit:**	$76,068.00	**QTR3 Used:**	$54,290.00
Remaining Amount:	$50,403.33	**QTR4 Limit:**	$76,913.19	**QTR4 Used:**	$72,314.28

List of Paid Invoices (14) **Back to Invoice Management**

Invoice	Invoice Period	Created Date	Paid Date	Invoiced Total	Paid Amount	AASIS Warrent	AASIS Document
CF0117REST-001	JANUARY 2017	2/3/2017	2/27/2017	$23,236.12	$23,236.12	1720439073	0051823147
CF0217REST-001	FEBRUARY 2017	3/2/2017	3/23/2017	$17,155.64	$17,155.64	1720609629	0051837245
CF0317REST-001	MARCH 2017	4/3/2017	4/25/2017	$13,898.24	$13,898.24	1720767511	0051853928

3. To sort the list by any column, click on its name and then click the arrow that displays to the right of the column name.
4. Click on any field for an invoice to display the invoiced charges.

Program: Residential Treatment **Provider:** [redacted] **Contract Number: 4600034292**
Status: PAID Date: 02/27/2017 **Description:** CF0117REST-001 Created on 02/03/2017 **Invoiced Total:** $23,236.12
Optional Description: **Comment:** **Invoice ID:** 45990 5487

Click here to view/hide Contract Encumbrance Financial Status

Export to Excel **Select Report Format:** Alphabetic Invoice Print Report

| **Back to Invoice List** |

List of Clients in this Invoice (7)

Client Name	Client ID	Client SSN	Type	Start Date	End Date	Units	Amount	Provider
[redacted]			1	01/01/2017	01/31/2017	31.00	$3,365.98	124965
[redacted]			1	01/01/2017	01/31/2017	31.00	$3,365.98	59044
[redacted]			1	01/01/2017	01/31/2017	31.00	$3,365.98	59044

5. You can complete the following tasks from this multi-function panel:
   - View or hide the **Contract Encumbrance Financial Status**, which shows the contract amount, encumbered amount not yet invoiced, invoiced amount, remaining encumbrance and a breakdown of quarterly limits and amounts used.
   - Click **Export to Excel** to render the list to an Excel (.xls) file.
   - Select a format in the dropdown list for **Select Report Format**:
     – Alphabetic Invoice

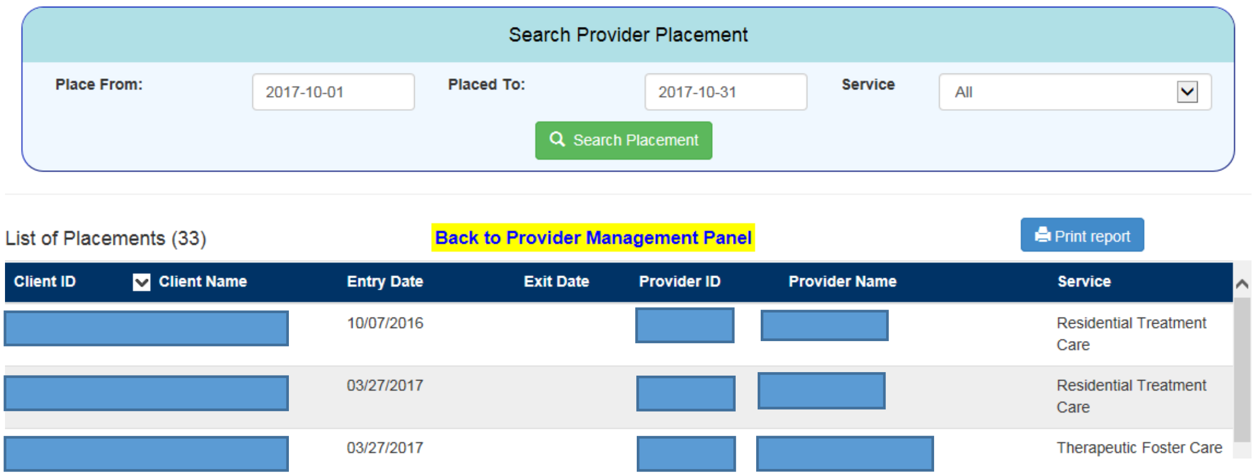
- Area/County Invoice
- Service Group Invoice

6. To sort the list by any column, click on its name and then click the arrow that displays to the right of the column name.
7. Click **Print Report** to print the list. See *Printing Reports* for details.

Viewing Placements

If your provider's contracts include placement services, you can view placements and print reports.

1. Navigate to the Provider Management Panel and click **View Placement.** The List of Placements panel displays.



2. To narrow the list with the Search Provider Placement panel, enter a range of dates and select a specific service or the default value of *All.*
3. Click **Search Placement** to filter the list according to your entries.

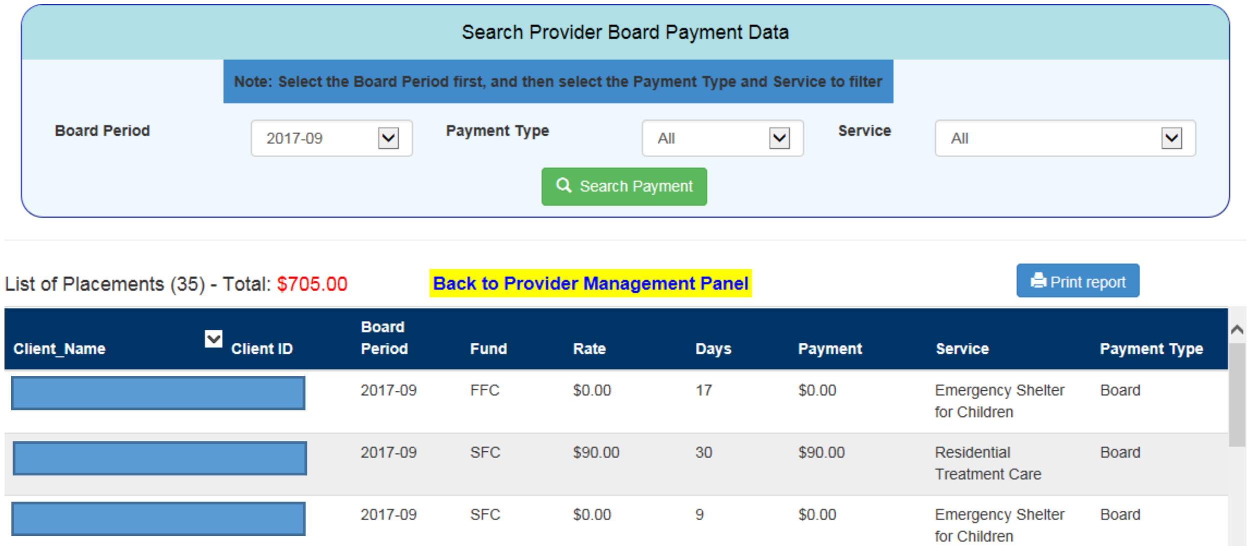
NOTE: Sort the list by any column. Click on its name and then click the arrow that displays to the right of the column name.

4. To print the list, click **Print Report**. A Print Placement Report window opens in your browser. See *Printing Reports* for details.

Viewing Board Payments

If your provider's contracts include placement services, you can view board payments and print reports:

1. Navigate to the Provider Management Panel and click **Board Payment.** The List of Placements panel displays.



2. To narrow the list with the Search Provider Board Payment Data panel, select a year and month in the Board Period dropdown list.
3. To further refine your search, you can optionally select values in the Payment Type and Service dropdown lists.
4. Click **Search Payment** to filter the list according to your entries.

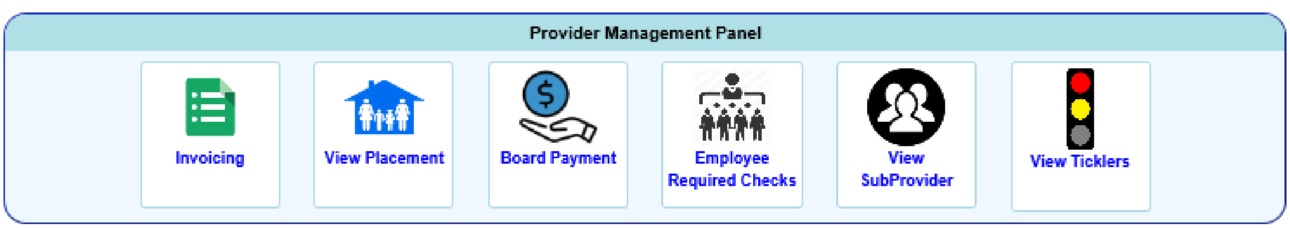
NOTE: Sort the list by any column. Click on its name and then click the arrow that displays to the right of the column name.

5. To print the list, click **Print Report**. A Print Board Payment Report window opens in your browser. See *Printing Reports* for details.

Viewing Subproviders

If you're a provider administrator for a master provider that provides certain placement services, you can view Subprovider screens and edit some Subprovider information.

1. To view Subproviders, navigate to the Provider Management Panel. (The following screen sample shows all possible functions; your provider's panel may display fewer options, depending on its contracts with DCFS).



2. Click **View SubProvider** to display the Master Provider's Sub Provider's List.

Master Provider's Sub Providers List (188)

Master Provider Name: CENTERS FOR YOUTH AND FAMILIES INC Master Provider ID: 282 **Back to Provider Management Panel**

Agency/Person Name	Provider ID	Service	County	Eligibility Status	AASIS Vendor ID
		Specialized Private Agency Foster Family Home	Jefferson (Pine Bluff)	Eligible	
		Therapeutic Foster Care L1	Jefferson (Pine Bluff)	Eligible	
		Therapeutic Foster Care L2	Jefferson (Pine Bluff)	Eligible	
		Therapeutic Foster Care L3	Jefferson (Pine Bluff)	Eligible	

3. Click on any field in an entry to view the Sub Provider Management Panel.

Sub Provider Details

Provider ID
Agency/Person Name
AASIS Vendor ID

Master Provider ID
MasterProviderName

Back to List

Sub Provider Management Panel

View Address	View and/or End Date the Sub Provider's Household Member Involvement	View, Edit, or Add Household Member Required Checks	View Sub Provider's Ticklers

From the Sub Provider Management Panel, click **View Address** to display the Sub Provider Address Details panel. PIE does not allow editing the address field. If you need assistance with an address change, please contact your Resource Worker.

Master Provider ID: Master Provider Name:
Sub Provider ID: Sub Provider Agency / Person Name:

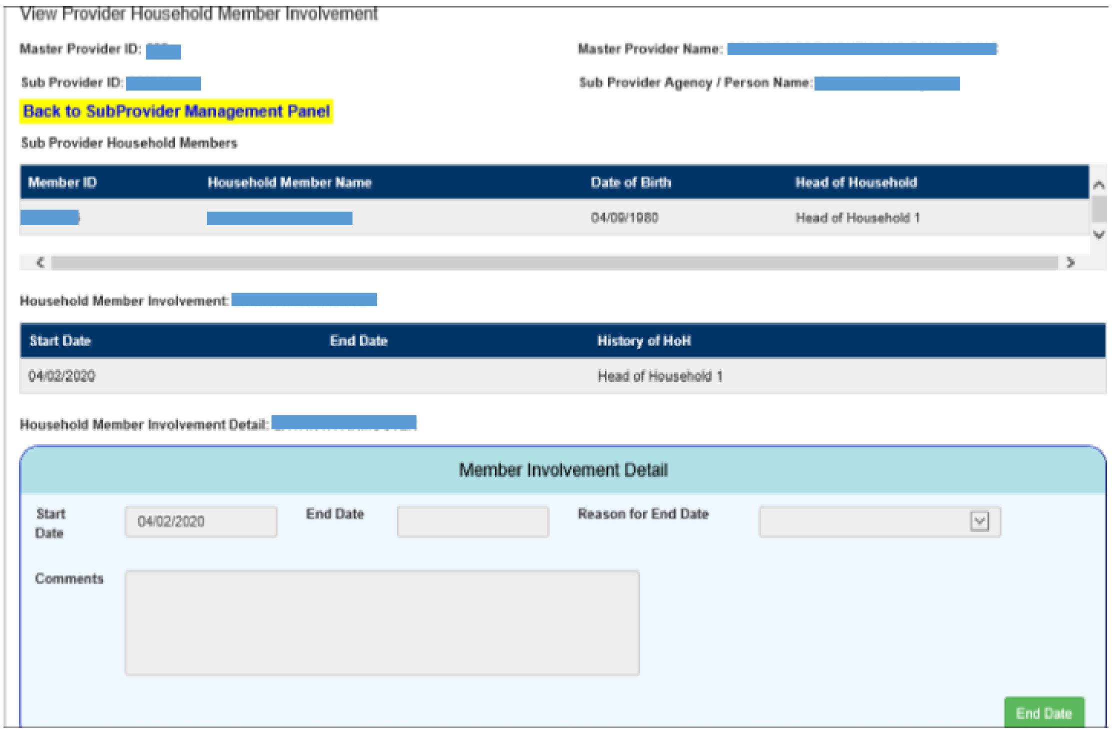
Back to SubProvider Management Panel

Address Type	Address	Start Date	End Date	Phone Number	
Physical Location		06/05/2020		-8193	Edit | Details
Physical Location		04/02/2020	6/5/2020	-8193	| Details

Sub Provider Address Details

Format: Street Address	Address Type: Physical Location	Start Date: 06/05/2020	End Date:
County: Jefferson (Pine Bluff)	Additional Header:		
Street Number	Street Pre Dir:	Street Name:	
Street Suffix: Road	Street Post Dir:	Unit Type:	Unit No:
City: WHITE HALL	State: Arkansas	Zip: 71602	
Comment:			
School District of Provider: WHITE HALL SCHOOL DISTRICT			
Phone: (870)	Phone Extension: 0	Fax: () -	

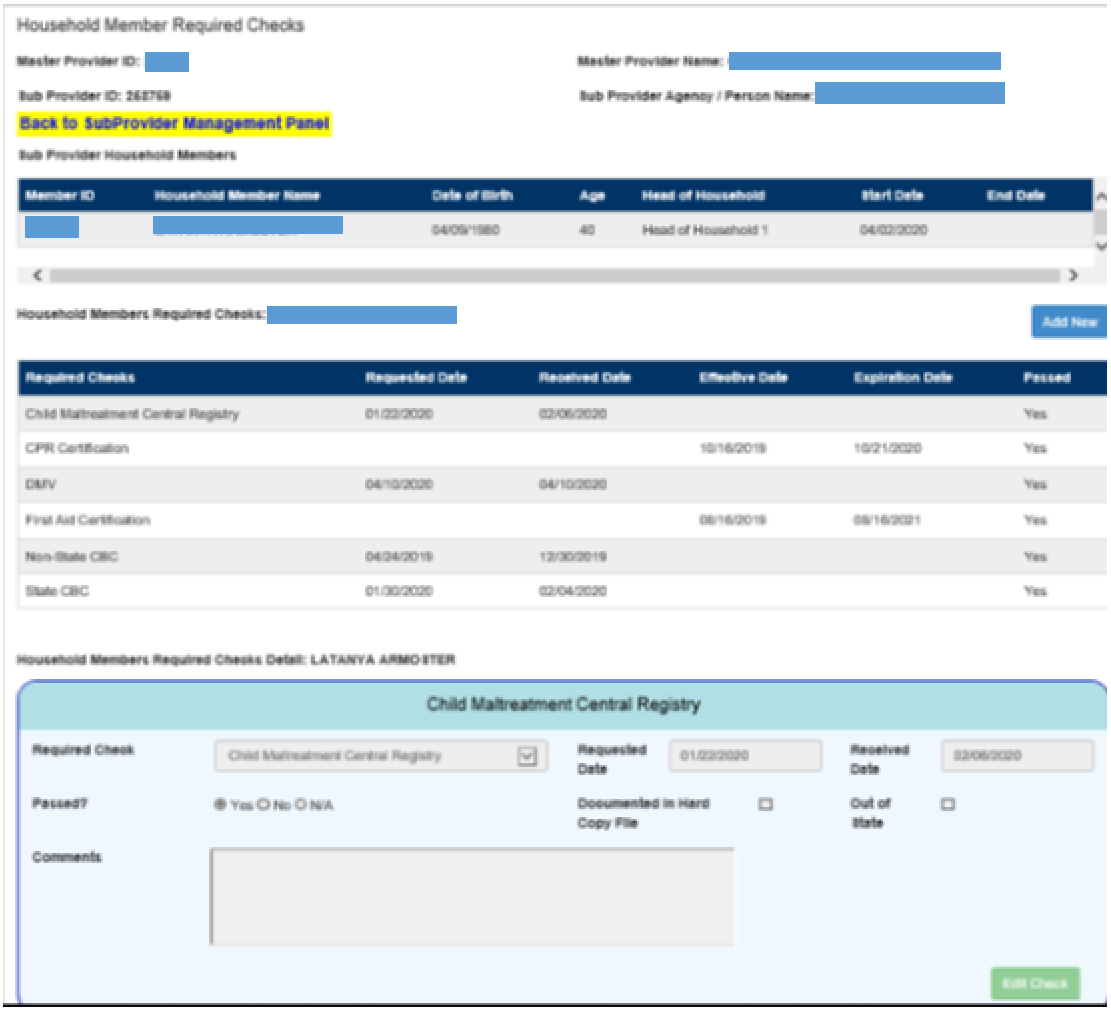
From the Sub Provider Management Panel, click **Household Member Involvement** to display the Sub Provider Household Member Involvement detail. You can end date household members who are no longer reside in the household by selecting the member name and clicking on the End Date button.



Clicking on End Date will display this screen. The End Date, Reason and/or Comments for End Date must be completed before saving the record.

After saving any changes, you may click **Back to SubProvider Management Panel List** link to return to SubProvider panel.

From the Sub Provider Management Panel, click **Household Member Required Checks** to display the Sub Provider Household Member Required Checks detail. You can add new Required Checks by clicking on the Add New button.



After saving any changes, you may click **Back to SubProvider Management Panel List** link to return to SubProvider panel.

From the Sub Provider Management Panel, click **View SubProvider Ticklers** to display the selected Sub Provider Tickler detail. You can view the status and/or due date for required checks by clicking on household member name.

Sub Provider's Ticklers List

Master Provider ID: [redacted]   **Master Provider Name:** [redacted]

Sub Provider ID: [redacted]   **Sub Provider Agency / Person Name:** [redacted]

Back to SubProvider Management Panel

Sub Provider Active Household Members

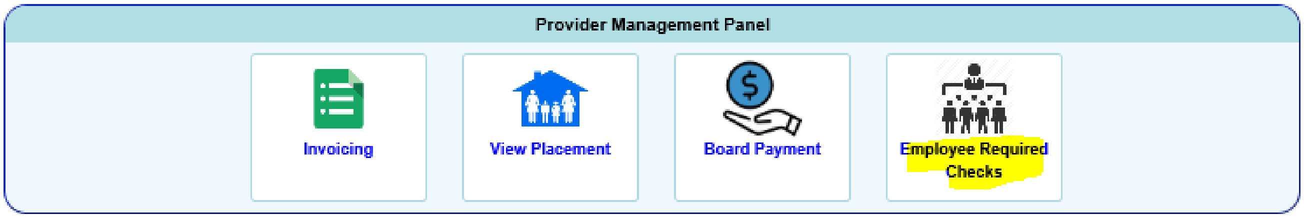
Member ID	Household Member Name	Date of Birth	Age	Head of Household	Start Date	End Date
[redacted]	[redacted]	04/09/1980	40	Head of Household 1	04/02/2020	

Household Member Ticklers: [redacted]

Tickler Type	Due Date	Tickler Description
CPR Certification	06/16/2021	Provider Tickler to be generated two months from the Expiration Date in the CPR Certification grouping on the Household Members screen in Provider.To remove the current Tickler, enter the most recent Expiration Date.The action also generates the next tickler.
First Aid Certification	06/16/2021	Provider Tickler to be generated two months from the Expiration Date in the First Aid Certification grouping on the Household Members screen in Provider. To remove the current Tickler, enter the most recent Expiration Date. The action also generates the next tickler.
State CBC	02/04/2022	Provider Tickler to be generated two years from the Received Date in the State CBC on the Household Members screen in Provider. To remove the current Tickler, enter the most recent Received Date. The action also generates the next tickler.
Child Maltreatment Central Registry	02/06/2022	Provider Tickler to be generated two years from the Received Date in the Child Maltreatment Central Registry on the Household Members screen in Provider. To remove the current Tickler, enter the most recent Received Date. The action also generates the next tickler.

You may click **Back to SubProvider Management Panel** link to return to SubProvider panel.

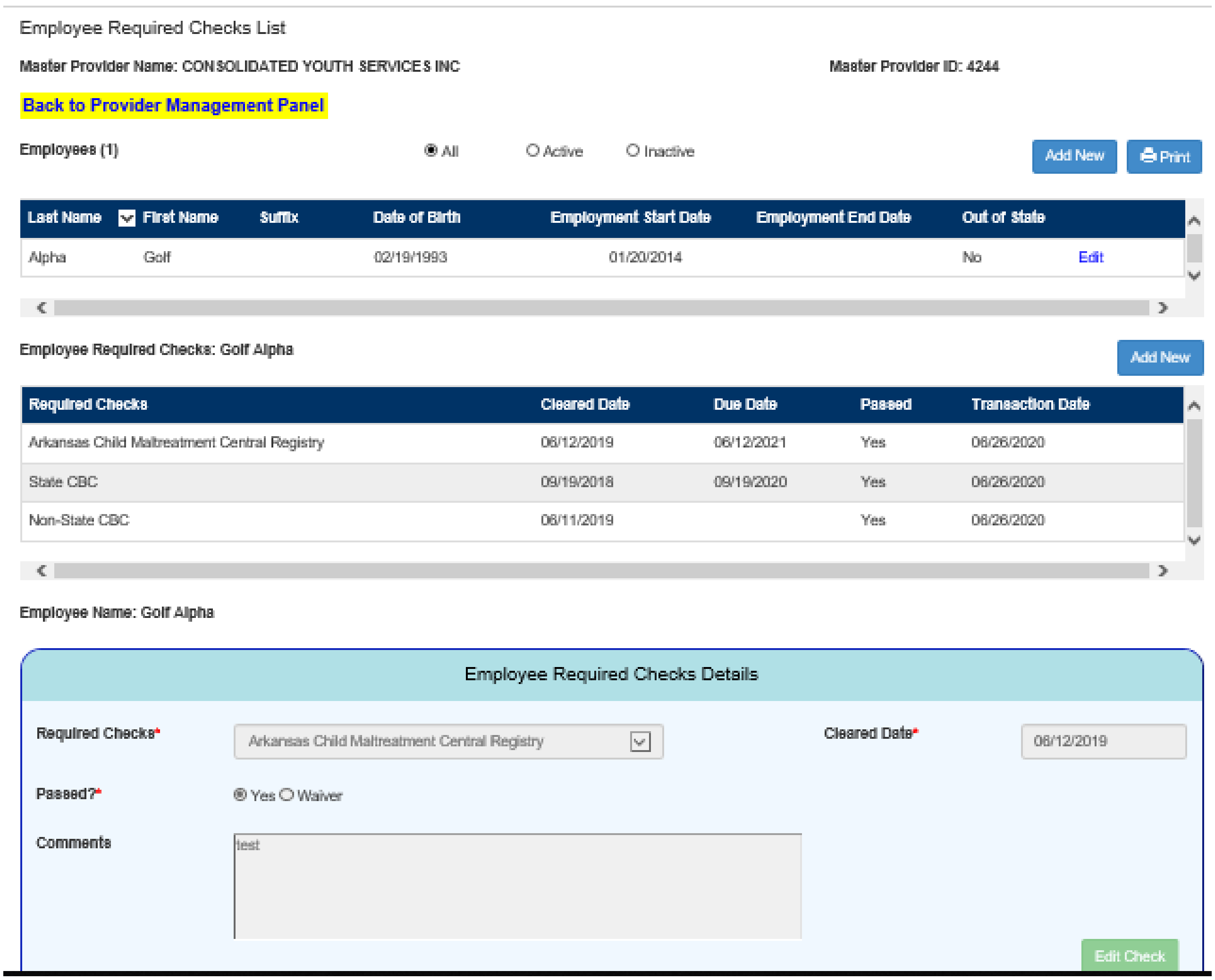
Employee Required Checks



If you're a provider administrator for a master provider that provides contract placement services for Emergency Shelter, QRTP/SRP-QRTP, Respite Care/Temporary Care, Residential Care Only, or Specialized DDS Emergency Program, you must enter and manage employee required checks in PIE.

1. To enter new or view existing employees requiring checks, navigate to the Provider Management Panel and select the '**Employee Required Checks'** icon

   (The following screen sample shows one active employee entry).

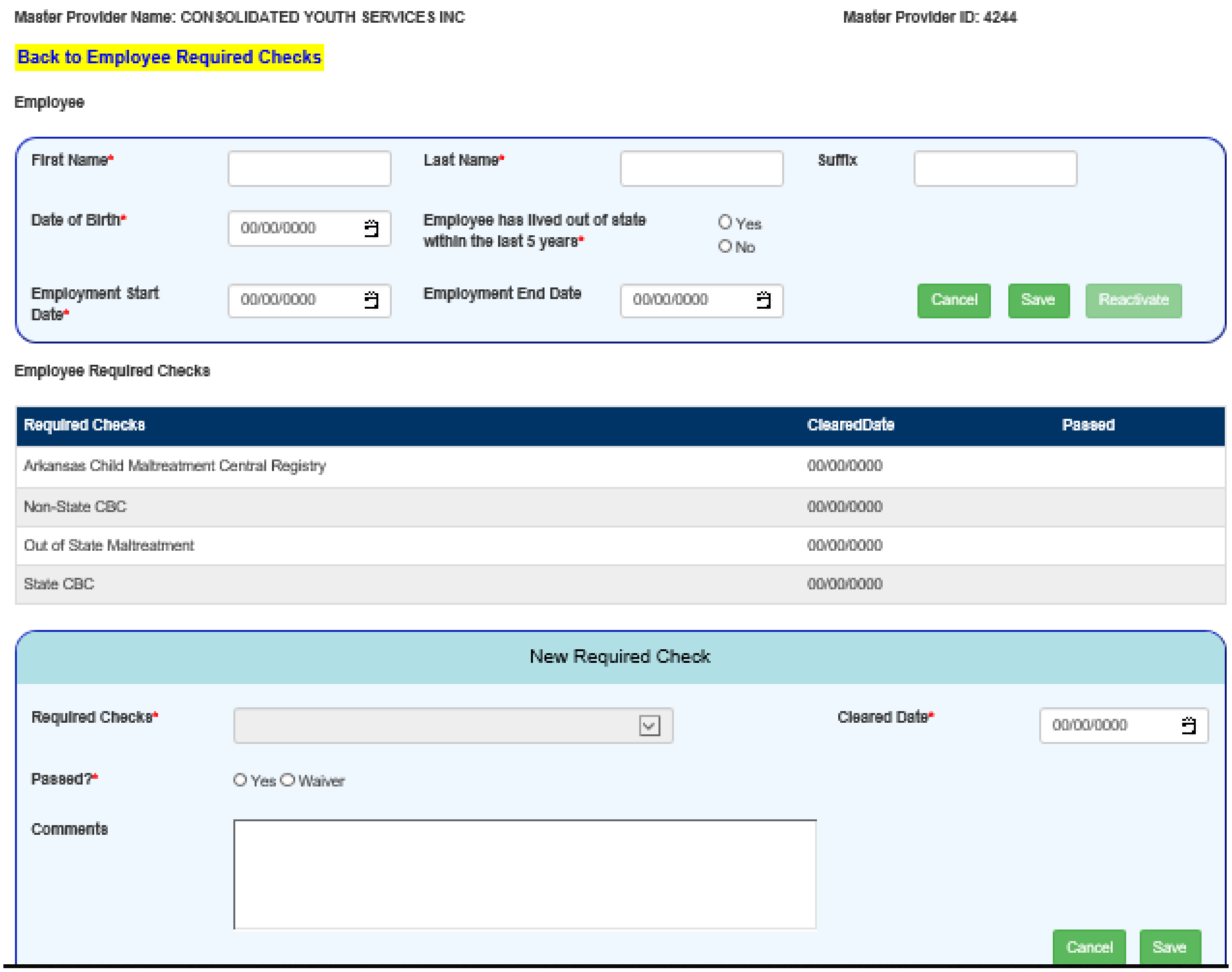


The provider must verify that <u>all</u> necessary employee required checks were done <u>before</u> entering them in PIE. If the employee is flagged to have lived out-of-state within the last 5 years, that will necessitate the 'Out of State Maltreatment' check as well as the other three (3) requisite check for a <u>new</u> employee entry (Arkansas Child Maltreatment Central Registry, Non-State CBC, and State CBC).

Provider-users can sort (All, Active, and Inactive) employees for viewing and/or to generate a printout. And, to aid in monitoring when required checks come due (Arkansas Child Maltreatment Central Registry and State CBC) and when <u>subsequent</u> checks are needed.

(The following screen sample shows entering a <u>new</u> employee entry).

Adding a New Employee


Master Provider Name: CONSOLIDATED YOUTH SERVICES INC

Master Provider ID: 4244

Back to Employee Required Checks

Employee

First Name* | Last Name* | Suffix

Date of Birth* 00/00/0000 | Employee has lived out of state within the last 5 years* ○ Yes ○ No

Employment Start Date* 00/00/0000 | Employment End Date 00/00/0000 | Cancel | Save | Reactivate

Employee Required Checks

Required Checks	ClearedDate	Passed
Arkansas Child Maltreatment Central Registry	00/00/0000	
Non-State CBC	00/00/0000	
Out of State Maltreatment	00/00/0000	
State CBC	00/00/0000	

New Required Check

Required Checks* | Cleared Date* 00/00/0000

Passed?* ○ Yes ○ Waiver

Comments

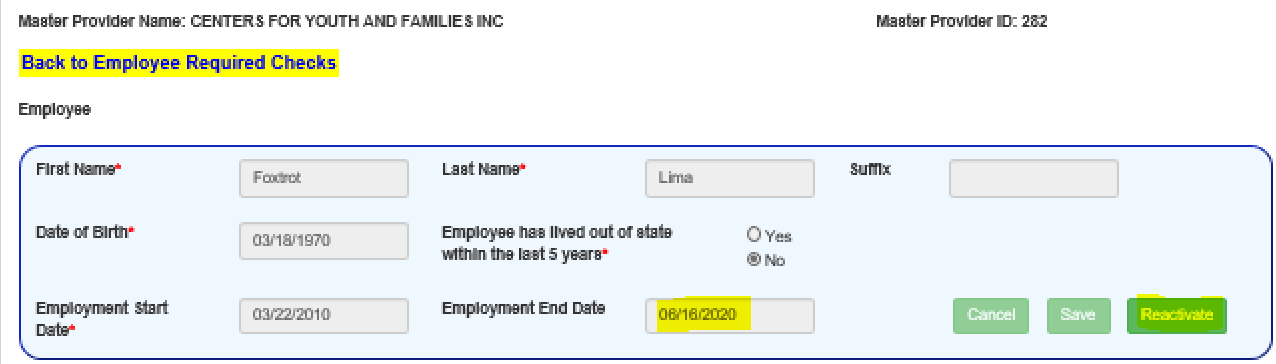
Cancel | Save

IMPORTANT! Bear in mind that <u>all</u> required fields and checks must be entered for a <u>new</u> employee, then saved from the 'Employee' inset grid. If you 'cancel' before all required information is entered & accepted, all entries will <u>not</u> be saved.

(The following screen sample shows **editing an <u>existing</u>** employee).

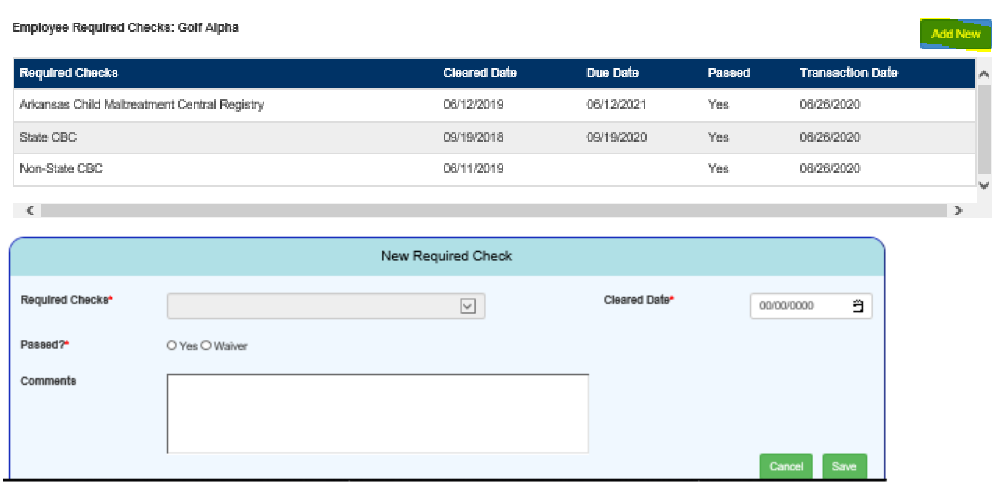
Information from this screen can be edited by provider-users, except for the 'Employment Start Date.' If you need general assistance updating existing employee entries (to include Out-of-State Maltreatment checks), please contact Robin Phillips at Robin.L.Phillips@dhs.arkansas.gov

(The following screen sample shows **re-activating an end-dated** employee).



Upon selection of the 'Reactivate' command button, both the 'Employee' and 'Required Checks' inset grids will present, and the user must enter all required information (like for a <u>new</u> employee)

As <u>subsequent</u> checks come due, users can <u>add</u> new checks to ensure employees are kept in compliance:

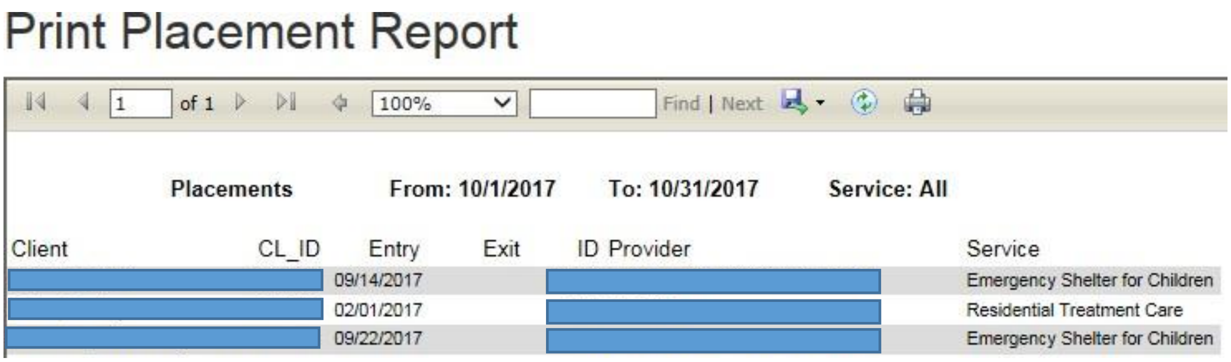


Printing Reports

You can apply the following steps to print invoices, placements, board payments or lists—any time you see a **Print Report** button in PIE.

1. Display the information you want to print.
2. As needed, select any available formatting options, such as Area/County Invoice format.

3. Click **Print Report**. An image of the information displays in a new browser window. The following example uses a placement report.



Controls at the top of the report enable you to:

- Navigate through the report, adjust the image size and search the data.
- Render the output in Word (.doc), Excel (.xls) or as a .PDF file.

  NOTE: For invoices, .PDF is the preferred format.

- Print it as it displays online without rendering to another format.

Viewing or Printing a List of Encumbrances

A list of encumbrances can be helpful for creating, editing or verifying an invoice. The path to the panel you use to view or print encumbrances depends on the choice you make on the Invoice Management Panel: Create New Invoice, View In-Process Invoices or View Paid Invoices.

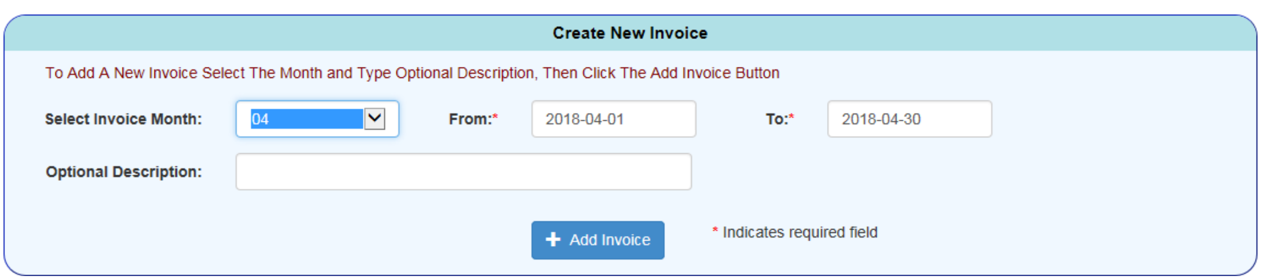
The following three sections describe those steps.

A – Printing a List of Encumbrances for a New Invoice

When you're creating a new invoice, you may want to add clients and charges to the invoice first, then print a list of encumbrances. Or you can print encumbrances before you add any charges. The following steps account for either option.

1. Navigate to the Invoice Management Panel and click **Create New Invoice**. The Create New Invoice panel displays.

   See *Invoicing and Using the Program List Panel* for details. It contains steps for displaying the Invoice Management Panel, which depend on the type of program associated with an invoice.

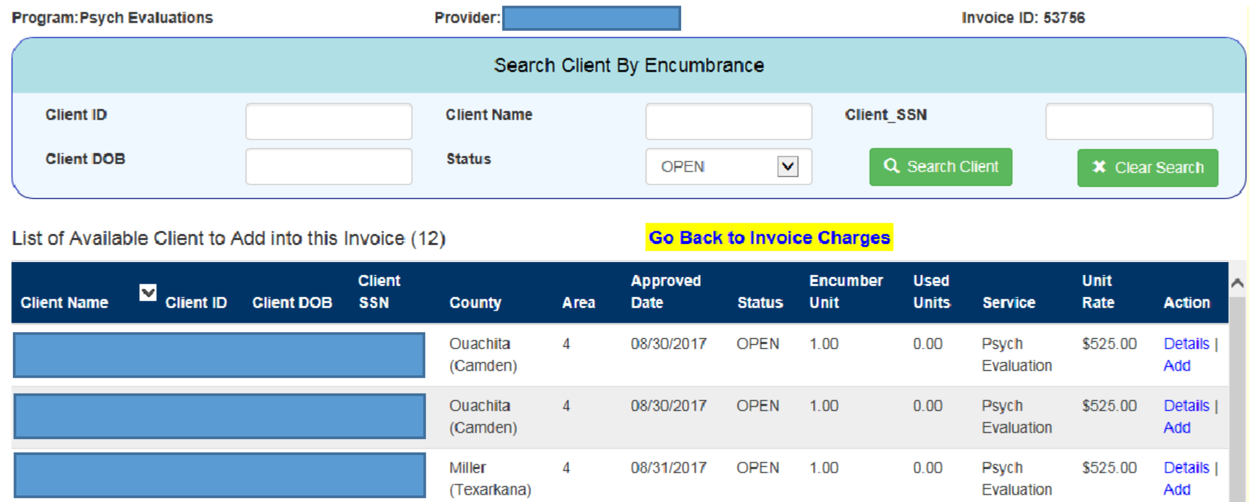


2. Select an **Invoice Month** from the dropdown list, which automatically enters the first and last days of the selected month. You can modify the dates to cover any period of days within the selected month.

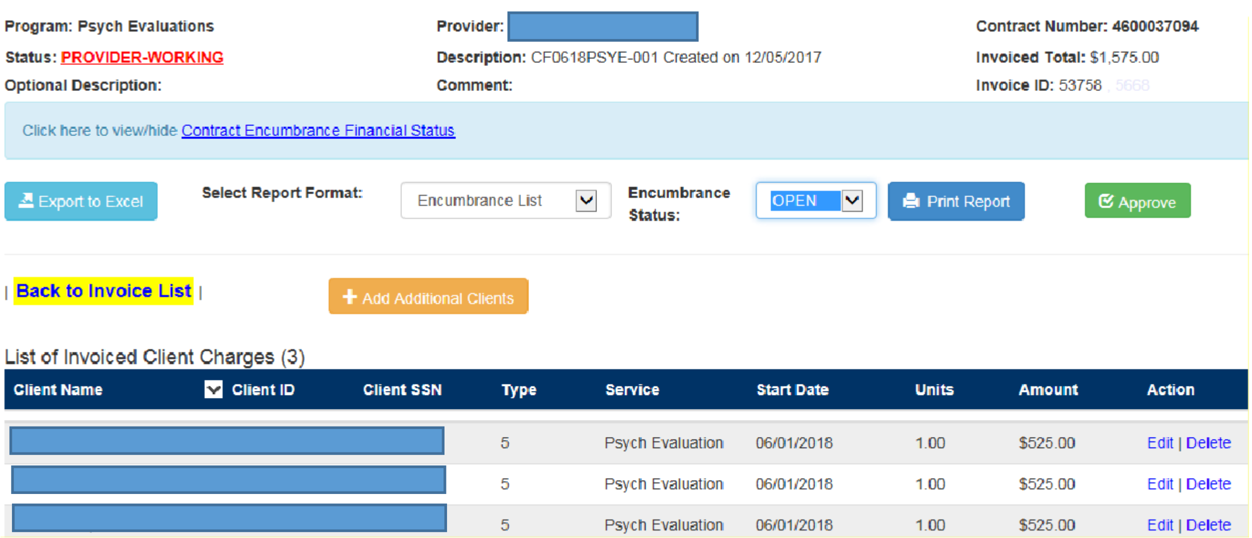
A user-defined description of up to 80 characters is optional.

3. Click **Add Invoice**. A message that includes a system-generated invoice name displays to confirm a successful transaction. The List of Available Client to Add into this Invoice panel displays.

NOTE: At this point in the process, you're not required to add clients to the new invoice. If your goal is to just print a list of encumbrances without adding clients and charges, skip the next step.



4. If needed, you can search for clients by ID, name, Social Security number or date of birth. You can also filter the list according to encumbrance status: All, Open, Used or Closed. See *Creating a New Invoice* for details.
5. Click **Go Back to Invoice Charges**. The List of Invoiced Client Charges displays.



6. In the **Select Report Format** dropdown list, select **Encumbrance List**.
7. In the **Encumbrance Status** dropdown list, select a value:
   - All
   - Open
   - Used

– Closed

8. Click **Print Report**. The encumbrance list displays in a new Web browser tab. See *Printing Reports* for related information.

Print Invoice Report

1 of 1 | 100% | Find | Next

[redacted]

Encumbrances: ALL

Client	CL_ID	SSN	DOB	County	Area	Service	Approved	Status	Units	Amount	Used
[redacted]				Miller (Texarkana)	4	Psych Evaluation	08/30/2017	USED	1.0	525.00	1.0
				Ouachita (Camden)	4	Psych Evaluation	08/08/2017	USED	1.0	525.00	1.0
				Ouachita (Camden)	4	Psych Evaluation	08/30/2017	USED	1.0	525.00	1.0
				Ouachita (Camden)	4	Psych Evaluation	08/31/2017	USED	1.0	525.00	1.0
				Union (El Dorado)	4	Psych Evaluation	08/08/2017	USED	1.0	525.00	1.0
				Union (El Dorado)	4	Psych Evaluation	08/31/2017	USED	1.0	525.00	1.0

B – Printing a List of Encumbrances for an In-Process Invoice

1. Navigate to the Invoice Management Panel and click **View In-Process Invoices** to display the List of In Process Invoices panel.

   See *Invoicing and Using the Program List Panel* for details. It contains steps for displaying the Invoice Management Panel, which depend on the type of program associated with an invoice.

Program: Psych Evaluations **Provider:** [redacted] **Contract Number: 4600037094**

Contract Encumbrance Financial Status

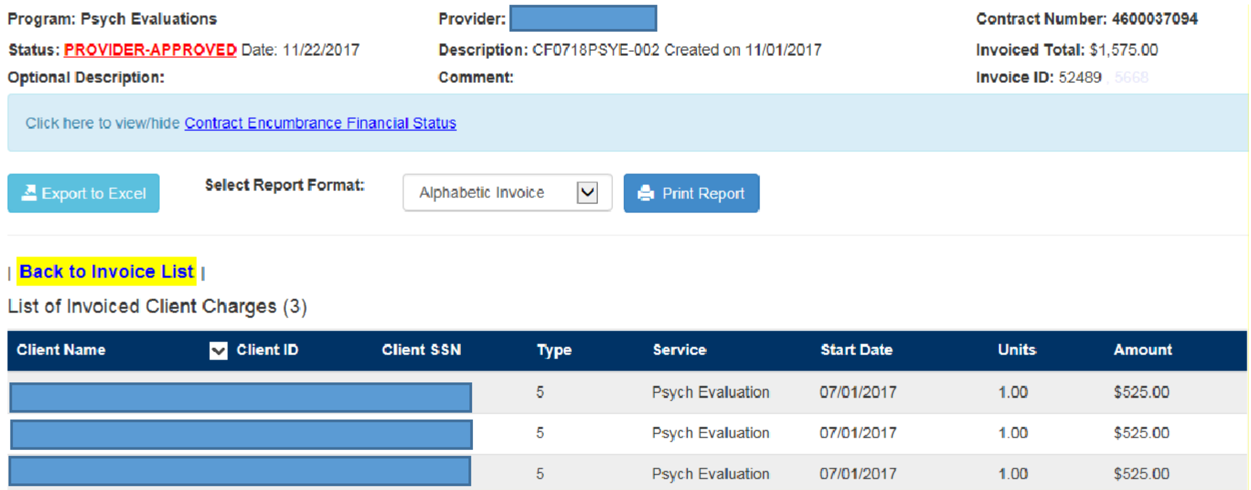
Contract Amount:	$42,500.00	**QTR1 Limit:**	$10,712.33	**QTR1 Used:**	$13,650.00
Encumbered not Invoiced:	$6,300.00	**QTR2 Limit:**	$10,712.33	**QTR2 Used:**	$4,200.00
Invoiced Amount:	$18,375.00	**QTR3 Limit:**	$10,479.45	**QTR3 Used:**	$525.00
Remaining Amount:	$17,825.00	**QTR4 Limit:**	$10,595.89	**QTR4 Used:**	$0.00

Select Invoice Status to Filter the Invoice List by Status: ALL

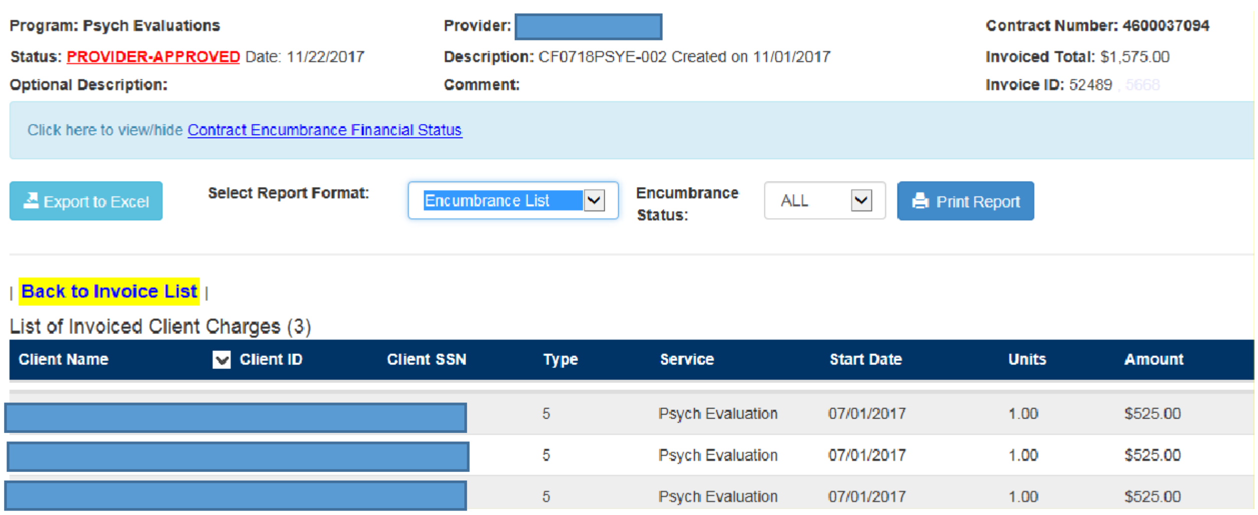
List of In Process Invoices (6) **Back to Invoice Management**

Invoice	Invoice Period	Contract	Created Date	Status	Invoiced Total	Action
CF0318PSYE-001	MARCH 2018	4600037094	11/22/2017	PROVIDER-APPROVED	$525.00	View
CF0718PSYE-002	JULY 2017	4600037094	11/1/2017	PROVIDER-APPROVED	$1,575.00	View
CF0818PSYE-001	AUGUST 2017	4600037094	8/30/2017	PROVIDER-APPROVED	$4,200.00	View
CF0918PSYE-001	SEPTEMBER 2017	4600037094	11/15/2017	PROVIDER-WORKING	$1,050.00	View/Edit | Delete

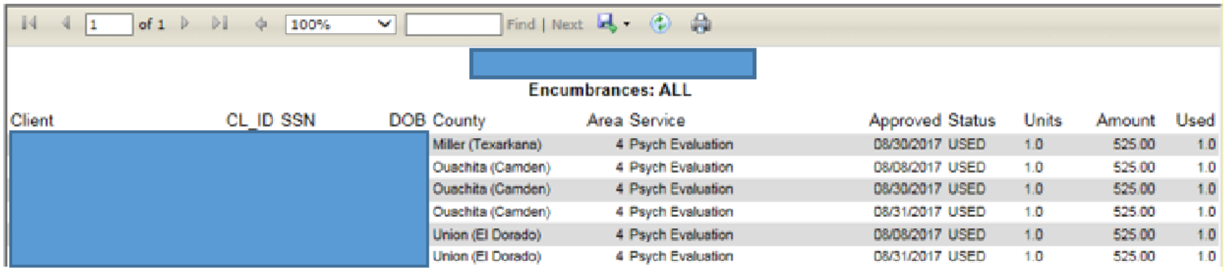
2. Click **View** or **View/Edit** to display the List of Invoiced Changes panel.



3. In the **Select Report Format** dropdown list, select **Encumbrance List**.
4. In the **Encumbrance Status** dropdown list, select a value:
   – All
   – Open
   – Used
   – Closed



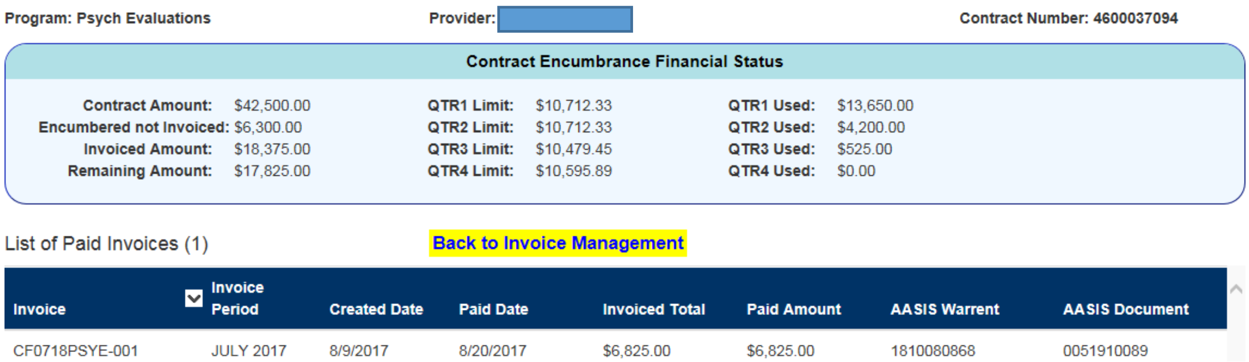
5. Click **Print Report**. The encumbrance list displays in a new Web browser tab. See *Printing Reports* for related information.



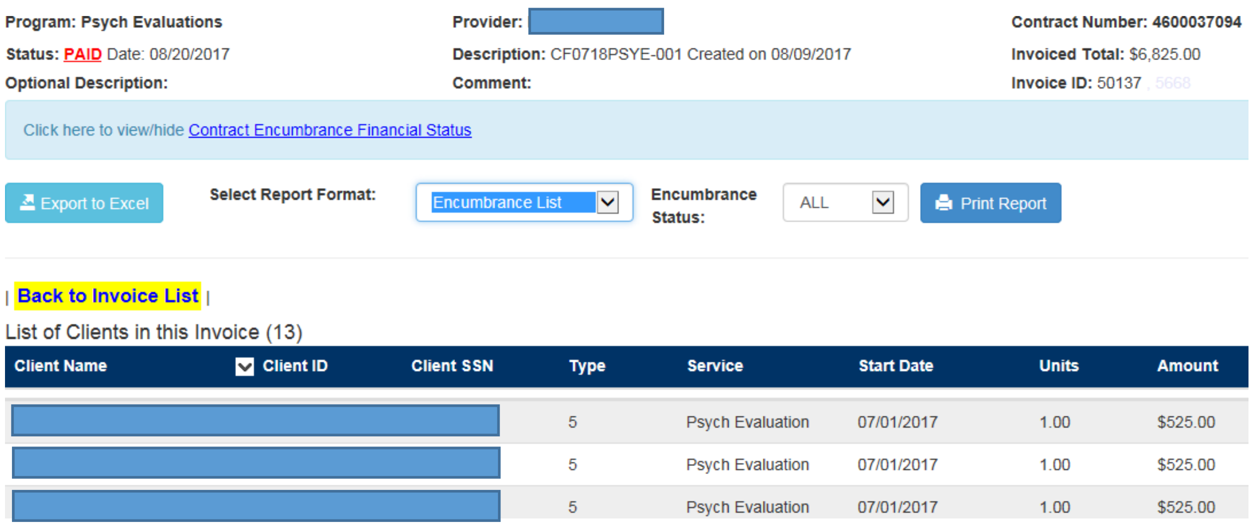
C – Printing a List of Encumbrances for a Paid Invoices

1. Navigate to the Invoice Management Panel and click **View Paid Invoices** to display the List of Paid Invoices panel.

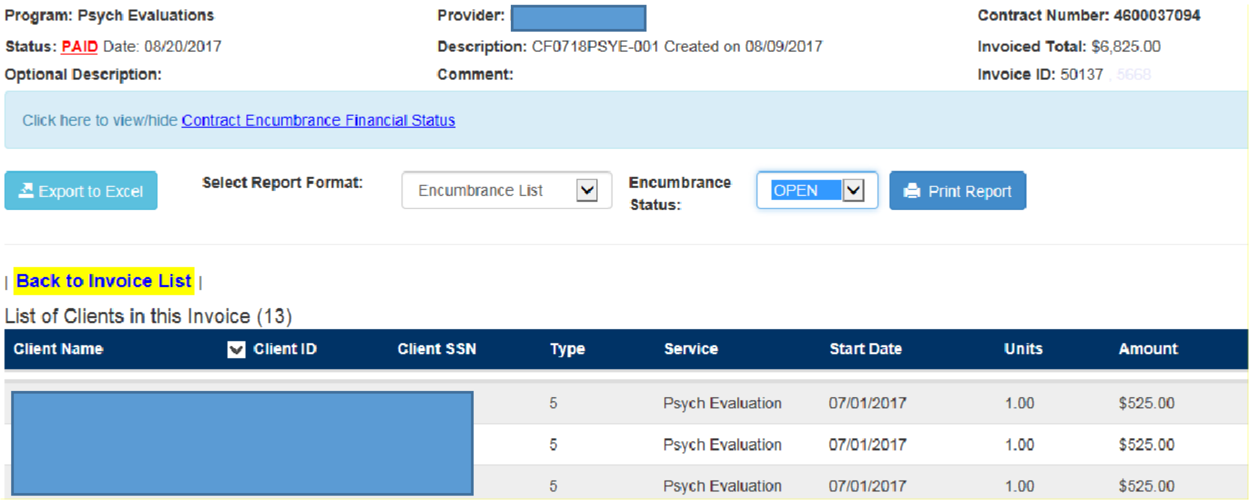
   See *Invoicing and Using the Program List Panel* for details. It contains steps for displaying the Invoice Management Panel, which depend on the type of program associated with an invoice.



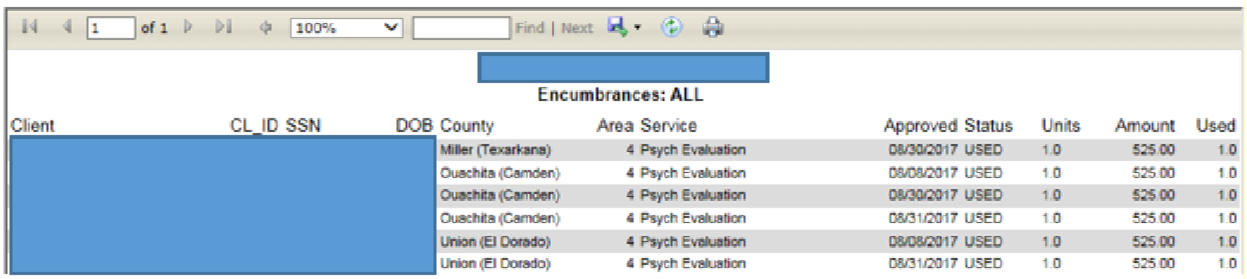
2. If needed, click any column heading to sort the list, then click any field for a selected invoice. The List of Clients in this Invoice panel displays.



3. In the **Select Report Format** dropdown list, select **Encumbrance List**.
4. In the **Encumbrance Status** dropdown list, select a value:
   - All
   - Open
   - Used
   - Closed



5. Click **Print Report**. The encumbrance list displays in a new Web browser tab. See *Printing Reports* for related information.



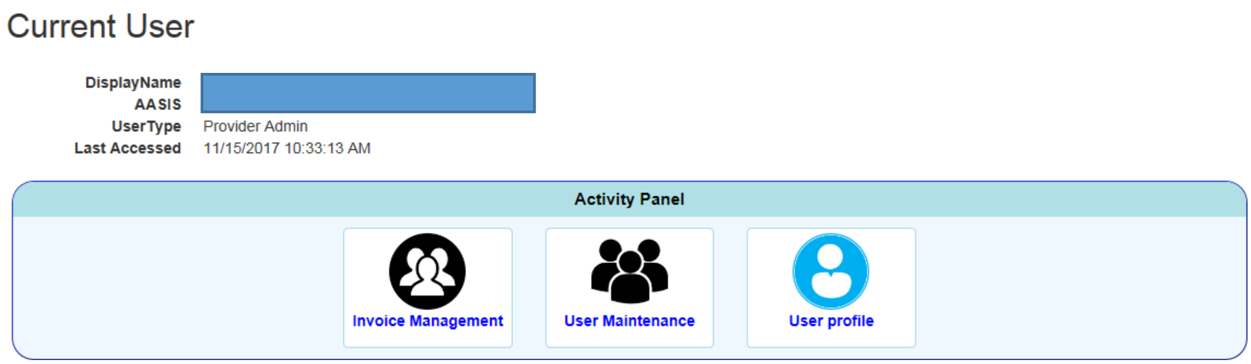
Section 3: Administrator Functions

This section describes processes that provider administrators follow to help other users. These functions aren’t available to provider users.

Activating New PIE Users

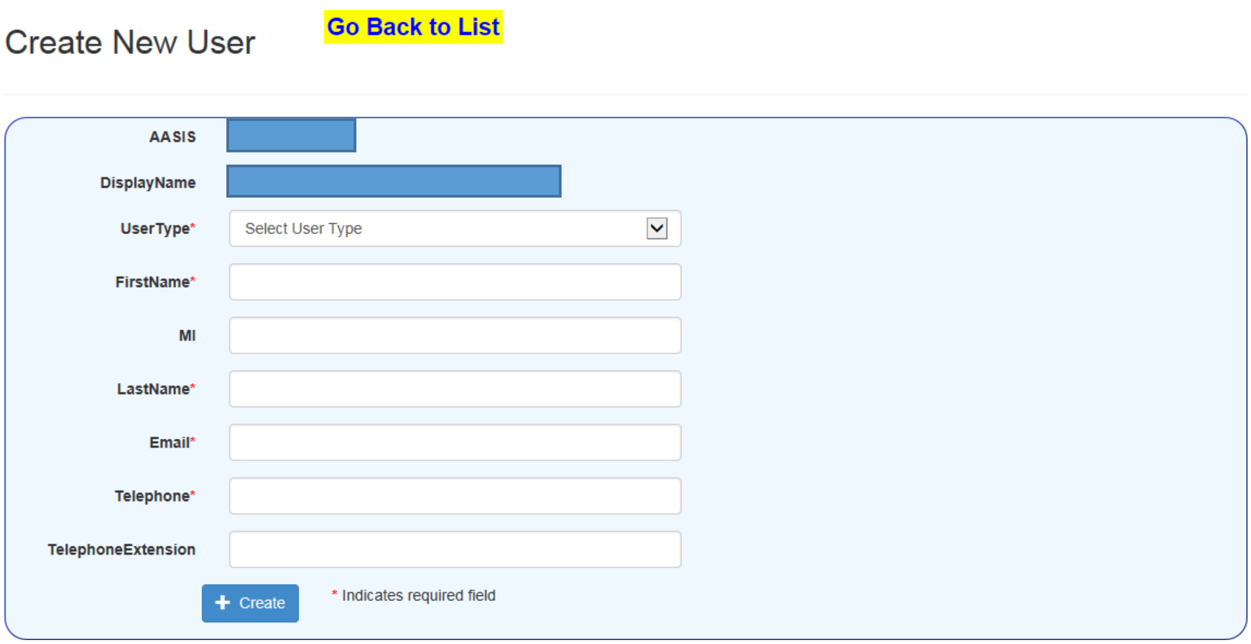
To add new PIE users for your service provider:

1. Log in to PIE to display the Activity Panel.



2. Click **User Maintenance.** The List of Users panel displays.

3. Click **Create New User** to display the Create New User panel.



4. Select a **User Type** to determine the new user's level of access to PIE. The options are:
   - Provider Admin – A person who performs user maintenance functions in addition to provider management functions.
   - Provider User – A person who performs provider management functions.
5. Enter the user's name, email address and telephone number.

6. Click **Create**. The *User Added Successfully!* message displays and PIE automatically sends an account activation email to the new user. It contains a link to PIE, a user name and instructions.
7. Click **OK** to clear the message. The List of Users panel displays with your new user listed.

List of Users

Create New User

Action	UserName	AASIS	UserType	FirstName	MI	LastName	Email	InActive
Edit | Details | Reset Password |			Provider Admin					False
Edit | Details | Activate User Account |			Provider User					False

NOTE: An Activate User Account link displays for your new user. It remains available ~~list~~ until the user activates the account. That enables you to send activation emails more than once to the same user if, for example, the link isn't used within 72 hours or the original email is delayed.

Once a user's account is activated, a Reset Password link replaces the Activate User Account link on the list. You can use it to send emails that enable users to reset their passwords if they forget them or are locked out of PIE.

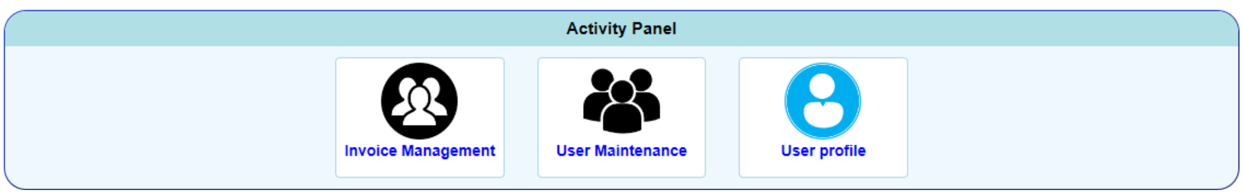
Deactivating PIE User Accounts

In addition to adding new users, provider administrators are responsible for deactivating PIE accounts when employees leave or no longer require access. To deactivate user accounts:

1. Log in to PIE to display the Activity Panel.

Current User

DisplayName
AASIS
UserType Provider Admin
Last Accessed 11/15/2017 10:33:13 AM



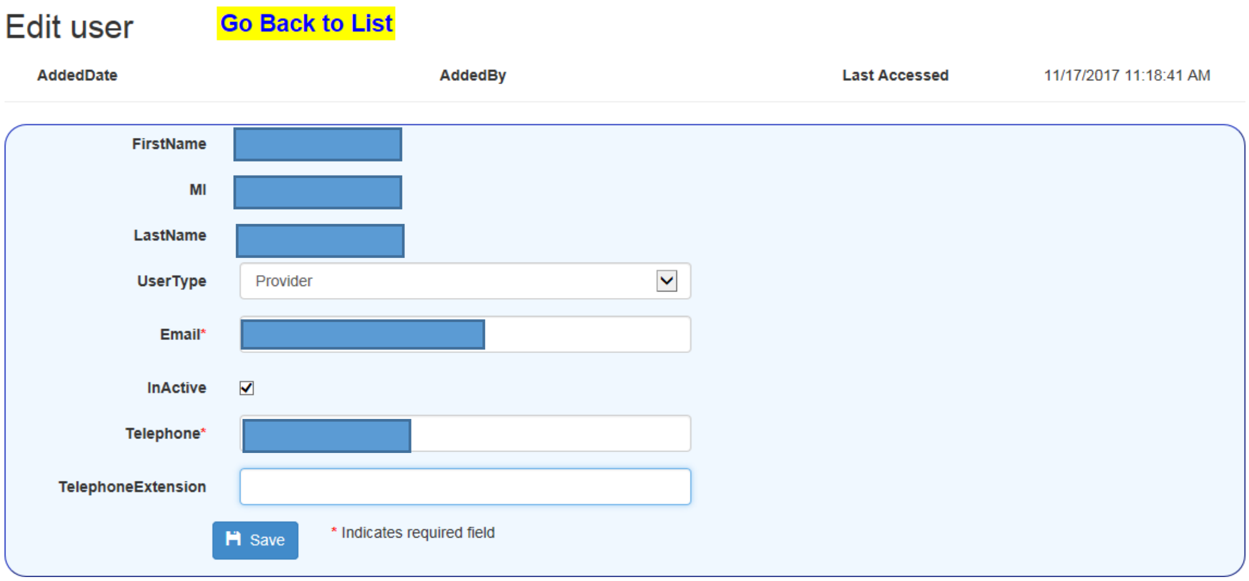
2. Click **User Maintenance**. The List of Users panel displays.

- List of Users

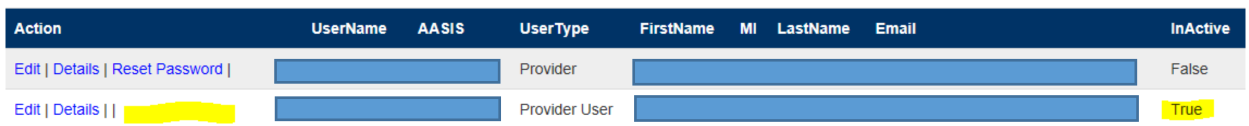
Create New User

Action	UserName	AASIS	UserType	FirstName	MI	LastName	Email	InActive
Edit | Details | Reset Password |			Provider Admin					False
Edit | Details | Activate User Account |			Provider User					False

3. Click **Edit** to display the Edit user panel and check the **InActive** checkbox.



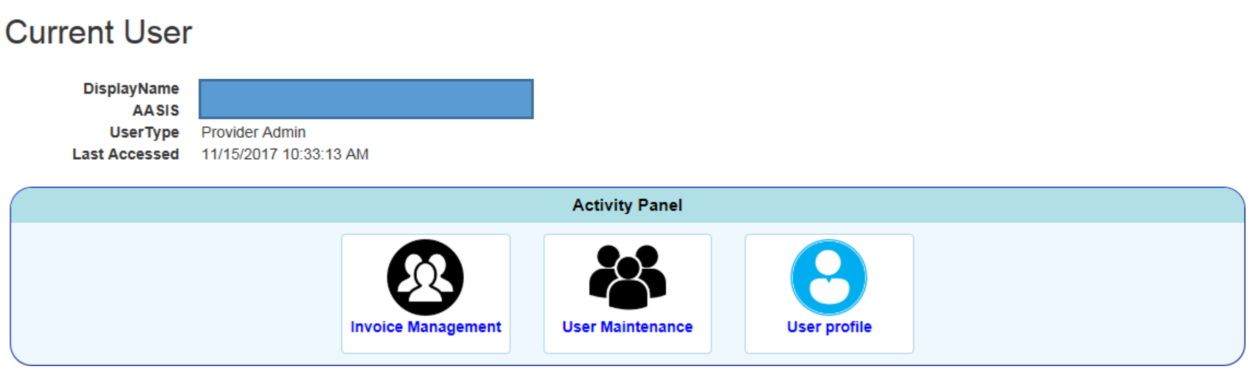
4. Click **Save**. A *User Updated Successfully!* message displays, and the List of Users panel redisplays. A Reset Password link is no longer available for the deactivated user, and the InActive indicator changes to *True*.



Editing PIE User Accounts

Provider users can edit their own email addresses, telephone numbers and extensions, but provider administrators can also edit that information and change a user's access level. To edit user accounts:

1. Log in to PIE to display the Activity Panel.



2. Click **User Maintenance**. The List of Users panel displays.

- List of Users

Create New User

Action	UserName	AASIS	UserType	FirstName	MI	LastName	Email	InActive
Edit | Details | Reset Password |			Provider Admin					False
Edit | Details | Activate User Account |			Provider User					False

3. Click **Edit** for the selected user to display the Edit user panel.

Edit user Go Back to List

AddedDate AddedBy Last Accessed 11/17/2017 11:18:41 AM

FirstName	
MI	
LastName	
UserType	Provider User
Email*	
InActive	☐
Telephone*	
TelephoneExtension	N/A

Save * Indicates required field

4. Update information as needed. You can also deactivate the account from this panel. See *Deactivating PIE User Accounts* for details.
5. **Click Save**. A *User Updated Successfully!* message displays.
6. To confirm the changes, click **Go Back to List**, which redisplays the List of Users panel. Click **Details** to display the updated User Details panel.

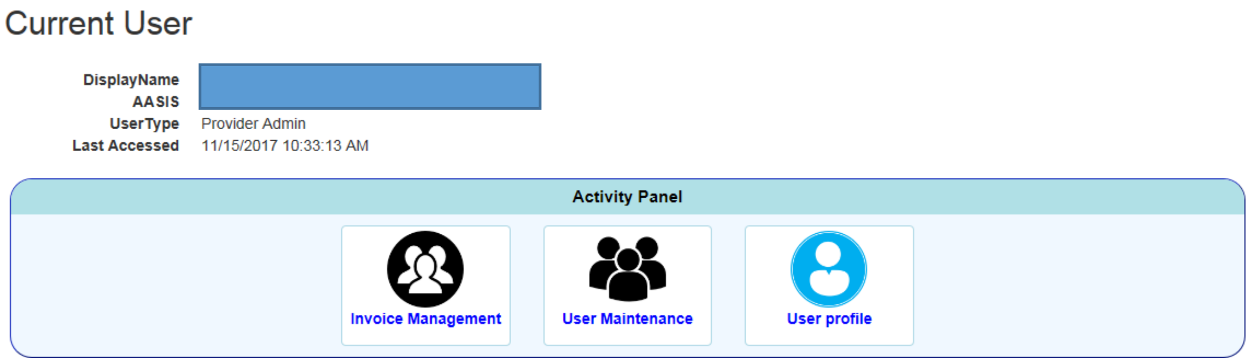
User Details Go Back to List

DisplayName	
UserName	
AASIS	
UserType	
UserStatus	
PasswordDate	
FirstName	
MI	
LastName	
AddedDate	
AddedBy	
LastUpdatedDate	11/29/2017 10:19:55 AM
LastUpdatedBy	
Email	
InActive	False
Telephone	
TelephoneExtension	
Last Accessed	11/17/2017 11:18:41 AM

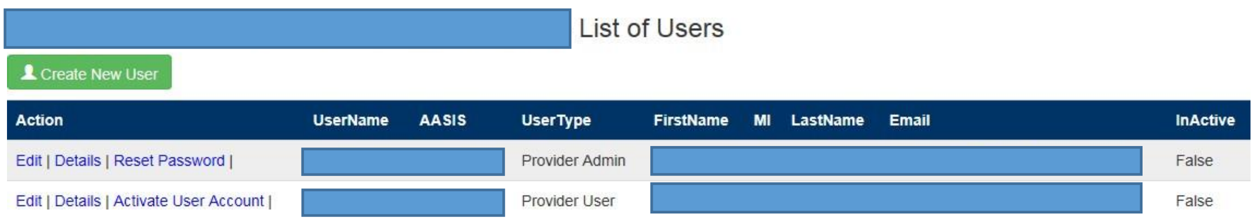
Helping Users Reset Their Passwords

When users forget their passwords or get locked out of PIE after three unsuccessful attempts to log in, they contact Provider Administrators to request a password reset. When you receive such a request:

1. Log in to PIE to display the Activity panel.



2. Click **User Maintenance**. The List of Users panel displays.



3. Click **Reset Password** to send the selected user an email. The *Reset Password email been sent successfully!* message displays. The user follows instructions in the email to complete the activation.