

Home Tab Training

Home

Define options available under dashboard, my profile, and TAI Upload tabs.

- Dashboard
 - Options
 - How To Select a SPN
 - How to download an invoice [save] (from web)
- My Profile
 - How to Update Your Profile
 - How to Change Your Password
- Other
 - Auto Email
 - Attach Documents
 - Save Comments
 - User Updates Quick Links

Launch Page [Online Help](#) link:

To log in to the eBilling system, click on the LAUNCH APPLICATION button and fill in the appropriate blanks with your supplied User ID and password. If you don't have a User ID, please contact your Vendor Administration or Regional Center Administrator.

Home Tab Training

Home: Dashboard

The eBilling application is arranged in a series of tabs and sub tabs, with available functions depending on the user's role assignment. At the top of each screen, you will find the Help link for the current screen and Logout.

Depending on your role, you will see a series of tabs that may include Home, Invoices, Payments, Reports, Service Provider Management, and Administration. Each of the main tabs contains sub tabs located directly below them.

Below the sub tabs you may see three icons to allow you to send an email, upload documents, or post comments.

In order to select the Invoices or Payments tabs, you will be required to select a vendor on your Home Dashboard. This vendor will be "in focus" for Invoicing and Payment History activities.

Home: Dashboard - Options

DASHBOARD:

Bulletins and Quicklinks

1. Bulletins are posted by regional centers for service providers.
2. Quicklinks provide easy access to other areas of the application.

MY PROFILE:

My Profile Tab Options

1. Allows updating the user profile including name, address and email.
2. Click update or close to return to the Dashboard.

AVAILABLE FILES FOR DOWNLOAD: This is the area where vendors are able to download current spreadsheet invoices.

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Home: Dashboard - How to Select a Service Provider Number (SPN)

1. Click on a service provider from the list of assigned (SPN's) and click OK when the popup message displays your selection.
2. Or enter the full SPN in the search field then click on the description below and click OK in the popup message.
3. Or enter the first 3 characters of the SPN and click on one of the selections from the list and OK in the popup message.
4. The selected SPN will now be in focus and appear at the top of the screen allowing access to tabs available to your user profile.

Home: Dashboard - How to Download a File

1. Log on to the eBilling system.
2. Select a service provider number (SPN) that has invoices available to download.
3. On right hand side of the home screen select the download button next to the file you would like to save to your computer.
4. A yellow bar may open on the top of screen. If so, allow the computer to download the file.
5. Click open to view the file or save a copy of it on your computer.

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Home: My Profile - How to Update Your Profile

1. Log on to the eBilling system.
2. Click on the My Profile Tab.
3. Update the appropriate fields.
4. You are also able to view all assigned SPNs on this screen.
5. Click update to save changes.
6. Click close to leave the screen without saving any changes.




Home: My Profile - How to Change Your Password

1. Log on to the eBilling system.
2. Click on the My Profile Tab.
3. Type a new password in the Password field.
4. Please note that for security reasons the actual length of the password will not be shown on the screen. It is also suggested that passwords be at least eight characters in length containing both letters and numbers.
5. Click update to save changes.
6. Click close to leave the screen without saving any changes.

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Home: Other Functions

The functions below will appear on several screens for users to access.

1.  Clicking on this icon allows users to send an email to the designated person at the regional center that has been set up to receive emails.
2.  Clicking on this icon allows users to upload documents by clicking on it clicking on the Select button, selecting a file and clicking the Upload button. The user will be able to save the file to their PC to open.
3.  Clicking on this icon allows users to enter comments applicable to the page they are accessing it from.