MINNESOTA JUDICIAL BRANCH

Psychological Services: Examiner Profiles

This is a quick reference for updating and maintaining your profile within the Psychological Services Electronic Invoicing application. For more information, online help is available within the application.

About an Examiner's Profile

Program Administration will complete the initial setup of your profile. After that is completed, it's your responsibility to continue your own profile setup. You can add, edit, and delete most of the information in your profile.

Personal Profile Options:

- **Profile:** This profile is for all examiners to complete. Use this profile to provide your contact and vendor billing information.
- **Travel Locations:** This profile is for all examiners to complete. Use this profile to indicate where you are willing to travel for assigned cases. It is recommended to add your home county as a location to which you would travel.

Financial Profile Options:

- **Contract:** This profile is for all examiners that hold contracts for service with the state or district. Use this profile to indicate which case types you are qualified and willing to accept, and your location, contract number, contract information, and rate for the case type.
- **Independent:** This profile is for all examiners that are independent examiners. Use this profile to indicate which case types you are qualified and willing to accept, and your rate for the case type.
- **Employee:** This profile is for all examiners that are employees. Use this profile to indicate which location and case types you are qualified and willing to accept. You do not need to enter your rates.

To Access the Profile Information:

1. Access Psychological Services. From the menu of options, select **Examiner >> Profile**. The Profile Options appear.
2. From the list of Profile Options, under Personal or Financials, select the applicable option: **Profile**, **Travel Locations**, **Contract**, **Independent**, or **Employee**. Then follow the applicable steps in this quick reference.

To Add Personal PROFILE Information:

1. Under Personal, click **Profile**. The Profile Information screen appears.
2. Complete the applicable fields.

Section	Action
Name	Where applicable, provide the requested information by selecting from the drop-down menu. Otherwise, type in the field(s) using proper case (e.g., John Smith).
Business Address	Where applicable, provide the requested information by selecting from the drop-down menu. Otherwise, type in the field(s) using proper case (e.g., 1234 5th Street South).
Email/Website	Where applicable, provide the requested information by typing in the field(s).
Phone	Where applicable, provide the requested information by selecting from the drop-down menu. Otherwise, type in the field(s).
Financial	In the Vendor Code field, type the code from your payment voucher.
Credentials	• In the Highest Degree Earned field, from the drop-down menu, select an option. • In the License Number field, type your examiner license number.
System	This section is for administrative use only.

3. At the bottom of the screen, click **Update.** The profile information is saved.
4. When completed, use the main toolbar to exit or navigate to your desired location
   OR
   To continue setting up/editing your profile, use the quick links at the bottom of the screen.

To Edit or Delete Any Content in an Examiner's Profile:

1. Navigate to the content you want to edit/delete, and click **Select**.
2. To edit the selected information, click **Edit.**
   OR
   To delete the selected information, click **Delete.**
3. Make your changes, if applicable. See the related instructions in this cheat sheet.
4. To save your changes, click **Update**.

Important:
You will not be flagged after you click delete. Please verify all items before deleting.

To Add Personal TRAVEL Information:

1. Under Personal, click **Travel Locations**.
   OR
   From the quick links at the bottom of the page, click **Travel**.
2. To select some locations, click **Show All Locations**. The entire list of locations opens.
   a. To sort the locations by district, click once on the District column header. The list of locations is now sorted by district. Now you have the ability to select the counties in a specific district.
3. From the list of locations, on the left-hand side, use the checkboxes to indicate your locations.
4. When your selections are complete, click **Save Choices**.

Steps continued on Page 2 >>

Psychological Services: Examiner Profiles

To Add Personal TRAVEL Information: (continued)

5. To review your selections only, click **Show Selected Locations**.
6. To continue setting up/editing your profile, use the quick links at the bottom of the screen.

To Add Financial CONTRACT Information:

1. Under Financials, click **Contract**. The Examiner Financials and the first or only listed Financial Contract Details appear.
   OR
   From the quick links at the bottom of the page, click **Contract**.
   a. If there is not any contract financials listed, a message will appear. Below the message, a new Contract Financial is ready for completing. Skip to step 3.
2. To add a new Contract Financial, click **New**. A new Financial Contract Details page opens.
3. Complete the applicable fields.

Field	Action
Location	This is a required field. From the drop-down menu, select an option.
Contract #	This is a required field. Provide the contract number.
Contract info	Provide the applicable contract information.
Rate	This is a required field. Provide the appropriate rate. It is recommended to provide numbers with decimals (e.g., 250.00); do not enter a dollar symbol. **Important:** If the rate entered exceeds the maximum rate allowed, a warning message will appear stating: "The amount entered exceeds the maximum hourly rate allowed by the State Court Administrator's Office Psychological/Psychiatric Examiner Payment Policy, No. 510(a)."
Per	From the drop-down menu, select an option (e.g., per case, per hour, or per service).
Case Types	From the checkboxes, select the applicable options.

4. To save your changes, click **Insert**. The new contract is added to the list of contracts. You are returned to the Examiner Financials and the first or only listed Financial Contract Details.
5. To continue setting up/editing your profile, use the quick links at the bottom of the screen.

To Add Financial INDEPENDENT Information:

1. Under Financials, click **Independent**. The Examiner Financials and the first or only listed Financial Independent Details appear.
   OR
   From the quick links at the bottom of the page, click **Independent**.
   a. If there are not any independent financials listed, a message will appear. Below the message, a new Independent Financial is ready for completing. Skip to step 3.
2. To add a new Independent Financial, click **New**. The Financial Independent Details appear.
3. Complete the applicable fields.

Field	Action
Rate	This is a required field. Provide the appropriate rate. It is recommended to provide numbers with decimals (e.g., 250.00); do not enter a dollar symbol. See **Important** note (located at top of this page). You will not be permitted to enter an hourly rate that exceeds the maximum hourly rate allowed under the Psychological/Psychiatric Examiner Payment Policy. Please contact the Service Desk if you would like the hourly rate indicated in your financial information to exceed the maximum hourly rate allowed under the payment policy. Click the **Service Desk** link at the bottom of the screen to submit a service desk ticket and include the hourly rate you want to have entered in your financial information.
Per	From the drop-down menu, select an option (e.g., per case, per hour, or per service).
Case Types	From the checkboxes, select the applicable options. **Note:** If you are unable to select a case type, it is probably defined under a different rate.

4. To save your changes, click **Insert**. The new independent information is added to the list of independents and you are returned to the Examiner Financials and the first or only listed Financial Independent Details.
5. To continue setting up/editing your profile, use the quick links at the bottom of the screen.

To Add Financial EMPLOYEE Information:

1. Under Financials, click **Employee**. The Examiner Financials and the first or only listed Financial Details appear.
   OR
   From the quick links at the bottom of the page, click **Employee**.
   a. If there are not any employee financials listed, a message will appear. Skip to step 3.
2. To add a new Employee Financial, click **New**. The Financial Details appear.
3. Complete the applicable fields: Location and Case Types.
4. To save your changes, click **Insert**. The new financial information is added to the list and you are returned to the Examiner Financials and the first or only listed Financial Details.
5. To continue setting up/editing your profile, use the quick links at the bottom of the screen.