Psychological Services User Manual

MINNESOTA JUDICIAL BRANCH

Psychological Services Electronic Invoicing User Manual

Revised June 30, 2008

Copyright © 2008 by the State of Minnesota
State Court Administrator's Office
All Rights Reserved
(ITD_SP_0497a)

Table of Contents

Psychological Services Overview

Psychological Services Electronic Invoicing is a web-based application containing a database that collects consistent and uniform data. This application will track the various components of an examiner's role by the submission of a uniform statewide invoice, and will enable Psychological Services, for the first time, to make statewide comparable analysis and suggest modifications in practice to improve quality examiner services and effectuate cost savings.

When a person is: (1) no longer able to manage their mental health; (2) unwilling/unable to seek medical treatment on their own; and (3) poses a danger to themselves or others, a hospital or family member may seek to have the court order a commitment. This requires the patient, by court order, to comply with the treatment plan.

The court requires an expert to inform the judge if the proposed patient meets the legal criteria for commitment based on a psychological examination. This expert is the court's examiner, and the cost is borne by the state. The court examiner reviews the file and interviews the proposed patient; then provides the court with an independent assessment of the need for commitment. If the proposed patient disagrees with the findings of the court's examiner, he/she is able to request a second examiner and the cost is again the responsibility of the state.

About this Document

This document contains information regarding the standard procedures for using and managing Psychological Services Electronic Invoicing. This technical and business user documentation provides the recommended steps for examiners, approvers, program administrator(s), and service desk personnel. Not all users of Psychological Services will perform every step described in this document. Please review the Table of Contents for applicable procedures. This user guide is available for viewing or printing from the **Help** link in Psychological Services' menu of options.

Other Resources

- Online searchable help is available in Psychological Services. To access it, click the **Help** link found on every page within the application.
- For assistance, use the "Service Desk" link at the bottom of any screen within Psychological Services Electronic Invoicing to contact the ITD Service Desk. The service desk is staffed during the hours of 7 AM to 5 PM, Monday through Friday, but you may submit your request at any time.

General Layout & Conventions

Navigation Tips

Psychological Services Electronic Invoicing is a web-based application with various web features and other conventions. Please review this section for tips on navigation.

Using Arrows

Tables default to 10 rows. If more than 10 items exist in a list, they will be listed on more than one page. Use the arrows at the bottom of the list to navigate forward or backward. If less than 10 items exist, then the arrows will not appear.

Arrow Icon	Description
	Goes forward one page.
	Goes backward one page.
	Skips forward to the last page.
	Skips backward to the first page.

Sorting Columns

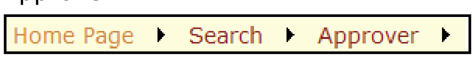
If you click once on the column name within any table header, it will sort the column in ascending order, and if you click on it again, it will sort it in descending order. If the list is extensive, this allows you to find what you are looking for a little quicker.

Menu of Options

The menu of options is different for the various user roles. See below for examples.

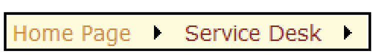
Program Administrator:

Approver:



Examiner:

Service Desk:



Roles & Rights

Psychological Services Electronic Invoicing has various roles and rights. Based on your role, different options appear in the main menu. The user roles are listed below.

User Role	Description
Examiners	This user is appointed to a case or accepts a case, and is the court's examiner who submits invoices for services performed.
Approvers	This user approves or denies invoices that are submitted by the examiner. This role includes both county-level approvers and district-level approvers.
Service Desk personnel	This user maintains examiner profiles and provides the services of Level 1 service desk support.
Program Administrator	This user provides profile setup services and other support, and is the main administrator of the application.

General Procedures

Opening Psychological Services

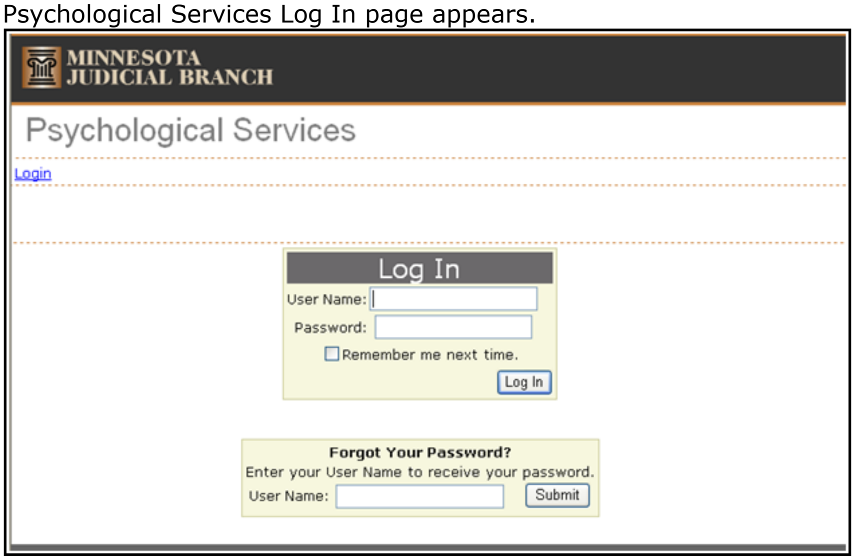
Psychological Services Electronic Invoicing can be accessed anywhere that has an internet connection.

1. In your web browser, type: http://www.mncourts.gov/psychservices. Press **Enter** or click **Go**.
   Psychological Services Login page appears.

Login to Psychological Services

Logging in is required every time you access Psychological Services. Every user is assigned a login and default password. After you login the first time, you may change your password. See Changing Your Password for details.

1. Open Psychological Services (see above).
   Psychological Services Log In page appears.



2. In the User Name field, type your username.
   Note: The username **is not** case-sensitive.
3. In the Password field, type your password.
   Note: The password **is** case-sensitive.
4. **Optional:** Select the checkbox for **Remember me next time**.
   Important: If you are using a shared or public computer, it is not recommended to select this option. If you select this option, your login credentials will be stored and the next time you visit, the system will pass you through without a prompt.
5. Click **Login**.

Logout of Psychological Services

To log out of Psychological Services, see below.

1. To end your session in Psychological Services, click **Logout**.
2. Close your browser window.

Forgetting Your Password

If you forget your password at any time, follow the steps below.

1. Open Psychological Services (see above).
   Psychological Services Log In page appears.
2. Under Forgot Your Password, in the User Name field, type your username.
   Note: The username **is not** case-sensitive.
3. Click **Submit**.

> **Important:**
> You will receive an email with a new default password. It is recommended to locate the new default password in the email and copy/paste it into the Psychological Services Log In screen (see the steps for logging in, above). You may then change your password to something that is easier to remember.

Changing Your Password

Every user is assigned a login and default password. After you login the first time, you may change your password using the required specifications.

Password rules:

- Must be at least seven characters long.
- Must have at least one non alpha-numeric character (a space is considered a non alpha-numeric character).

Note: There is not an upper-case character requirement or a limit on the number of characters. **However, passwords are case sensitive.**

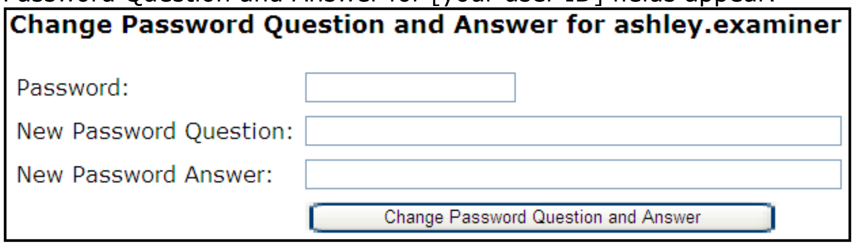
1. From the menu of options, select **Home Page** >> **Change Password**. The Change Your Password dialog appears.
   

2. In the Password field, type your current password.
3. In the New Password field, type your new password.
4. In the Confirm New Password field, type your new password again.
5. To save changes, click **Change Password**.
   OR
   To exit out of dialog without saving the changes, click **Cancel**.

Changing Password Security

Along with a login and password, every user may set up a security measure to gain access to their password if they should forget it.

1. From the menu of options, select **Home Page** >> **Change Security Question**. The Change Password Question and Answer for [your user ID] fields appear.



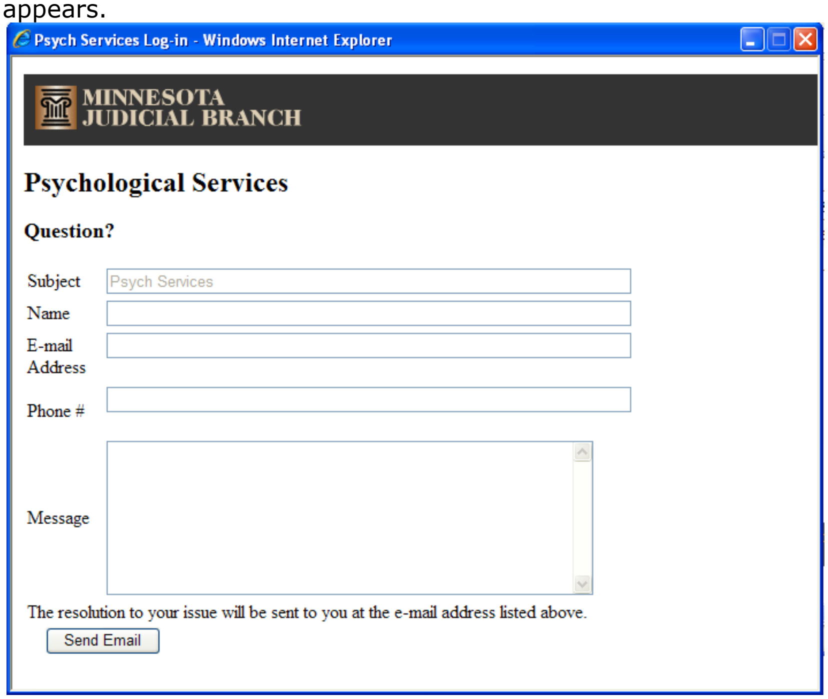
2. In the Password field, type your current password.
3. In the New Password Question field, type a question (e.g., favorite color).
4. In the New Password Answer field, type the answer to your security question (e.g., yellow).
5. To save changes, click **Change Password Question and Answer**. Your password question and answer is changed.

Note:
Verify that you are careful when creating your password question and answer. If you accidentally enter a space or an extra character, that space or character will get saved and may cause problems when you try to use it at a later time.

Reporting a Problem

For assistance, use the “Service Desk” link at the bottom of any screen (see below) within Psychological Services to contact the ITD Service Desk. The service desk is staffed during the hours of 7 AM to 5 PM, Monday through Friday, but you may submit your request at any time. Follow the steps below.

1. To report a problem, at the bottom of any screen, click **Service Desk**. A Psychological Services dialog appears.



2. Complete the fields.

Field	**Description**
Subject	This is not an editable field.
Name	Provide your name.
E-Mail Address	Provide your email address. This is the email address through which you will be contacted.
Phone #	Provide a phone number by which we can contact you if we have questions.
Message	Provide a detailed explanation of your issue. It is recommended that you provide specific details such as what screen you were on, what action you performed when you encountered the issue, the error that appeared, etc. This assists the service desk to more efficiently resolve the issue.

3. Click **Send Email**. The ticket is sent to the service desk and you will be contacted via the email address that you entered.

Examiner Tools & Resources

Profiles

Overview of Examiner Profile

Program Administration will complete the initial setup of your profile. After that is completed, you have the responsibility to continue your own profile setup. You have the ability to add, view and edit, and delete most of the information in your profile. Profiles are organized under two main sections; please refer to the applicable steps, below.

Personal

- Profile Information
  - Adding Profile Information
  - Viewing/Editing Profile Information
- Travel Locations Information
  - Adding Travel Locations Information
  - Viewing/Editing Travel Locations Information

Financials

- Contract Information
  - Adding Contract Information
  - Viewing/Editing Contract Information
  - Deleting Contract Information
- Independent Information
  - Adding Independent Information
  - Viewing/Editing Independent Information
  - Deleting Independent Information
- Employee Information
  - Adding Employee Information
  - Viewing/Editing Employee Information
  - Deleting Employee Information

Profile Option	**Description**
Personal	
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.
Financials	
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.

Adding/Viewing/Editing Examiner Profile: Personal Information

The following steps are for adding, viewing, and editing personal information in your profile.

1. From the menu of options, select **Examiner** >> **Profile**. The Profile Options appear.

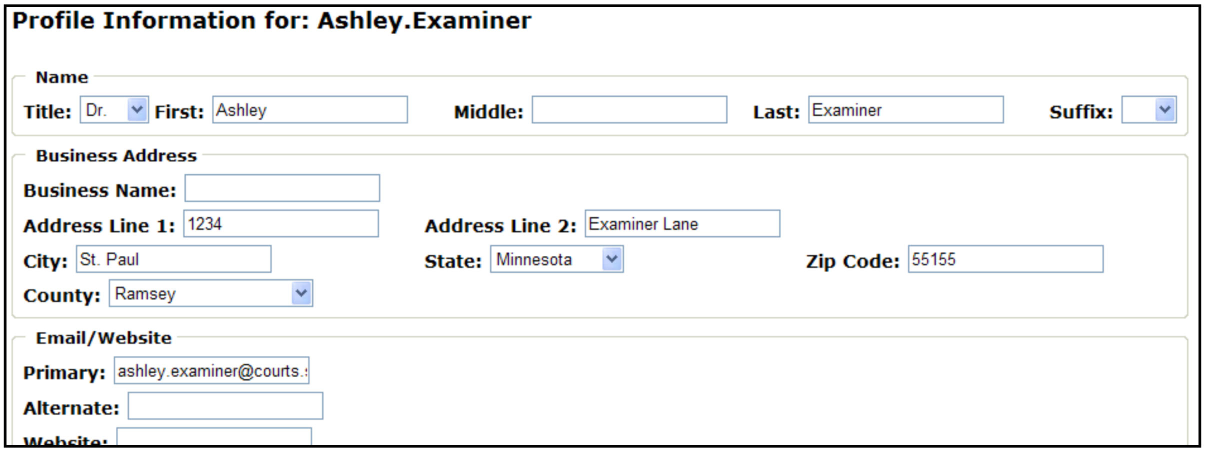
2. From the list of Profile Options, under Personal, select a desired option.
   - Profile
   - Travel Locations

Profile Information (Examiner)

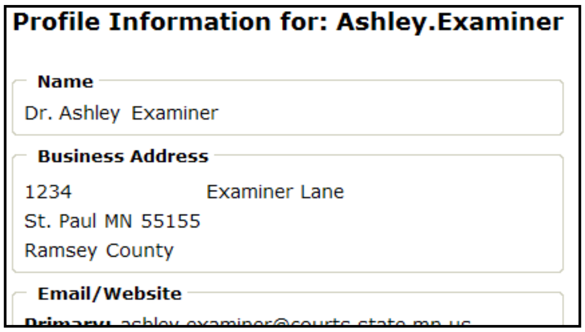
To Add Profile Information

1. Under Personal, click **Profile**. The Profile Information screen appears.
2. To edit the information, at the bottom of the screen click **Edit**. The fields open for editing.
3. Complete the applicable fields.

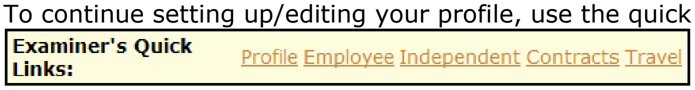
Section	Action
Name	Where applicable, provide the requested information by selecting from the drop-down menu. Otherwise, type in the field(s) using proper case (e.g., John Smith).
Business Address	Where applicable, provide the requested information by selecting from the drop-down menu. Otherwise, type 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.



4. At the bottom of the screen, click **Update**. The profile information is saved.

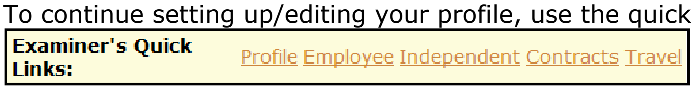


5. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up/editing your profile, use the quick links at the bottom of the page.



To View/Edit Profile Information

1. Under Personal, click **Profile**. The Profile Information screen appears.
   OR
   From the quick links at the bottom of the page, click **Profile**.
2. To edit the information, at the bottom of the screen, click **Edit**.
3. See the above table (located in To Add Profile Information) for completing/editing the fields.
4. At the bottom of the screen, click **Update**. The profile information is saved.
5. 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 page.



Travel Locations Information (Examiner)

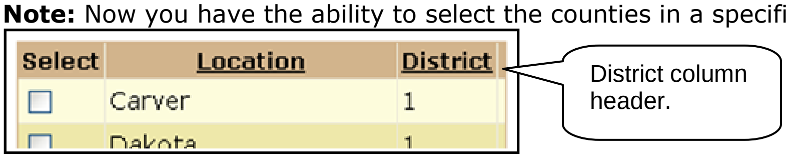
To Add Travel Locations Information

> **Note:**
> The courts will be able to search for examiners based on the travel locations indicated in their profile.

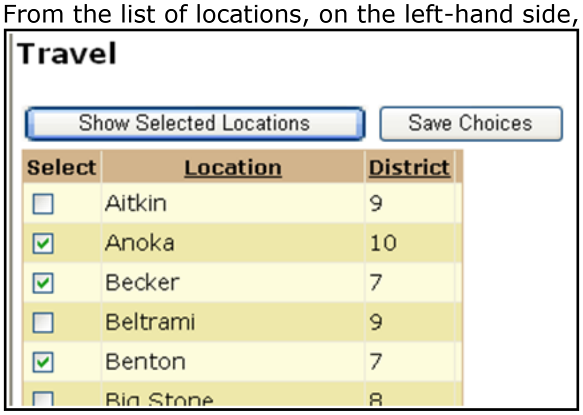
1. Under Personal, click **Travel Locations**.
   OR
   From the quick links at the bottom of the page, click **Travel**.

   > **Note:**
   > A map of all the counties and districts in Minnesota is provided. From the Examiner Travel screen, click the **MN Map** hyperlink located above the main menu. It opens in its own web browser window.

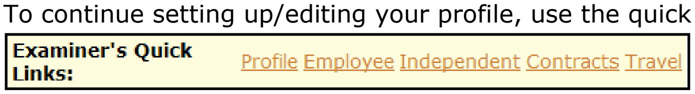
2. To select some locations, click **Show All Locations**. The entire list of locations opens.
   a. To sort the locations by district, click once on the **District** column header. The list of locations is now sorted by district.
   Note: Now you have the ability to select the counties in a specific district.



3. From the list of locations, on the left-hand side, use the checkboxes to indicate your locations.

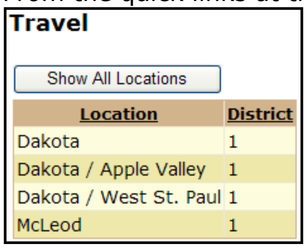


4. When your selections are complete, click **Save Choices**.
5. To review your selections only, click **Show Selected Locations**.
6. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up/editing your profile, use the quick links at the bottom of the page.



To View/Edit Travel Locations Information

1. Under Personal, click **Travel Locations**. The Travel screen appears showing your travel location selections.
   OR
   From the quick links at the bottom of the page, click **Travel**.



Travel

Show All Locations

Location	District
Dakota	1
Dakota / Apple Valley	1
Dakota / West St. Paul	1
McLeod	1

   a. If there is more than one page of travel locations, to navigate through the pages, click the arrows.

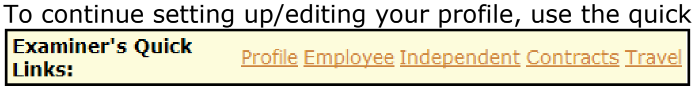
2. To edit or add locations to your selections, click **Show All Locations**. The entire list of locations opens.
   Note: Your selections are indicted by a checkmark next to the location.

Travel

Show Selected Locations | Save Choices

Select	Location	District
☐	Aitkin	9
☐	Anoka	10
☐	Becker	7
☐	Beltrami	9
☐	Benton	7
☐	Big Stone	8
☐	Blue Earth	5
☐	Brown	5
☑	Carlton	6
☑	Carver	1
☑	Cass	9
☑	Chippewa	8
☑	Chisago	10
☑	Clay	7

3. To select or deselect a location, on the left-hand side, click within the desired checkbox.
4. When your selections are complete, click **Save Choices**.
5. To review your selections only, click **Show Selected Locations**.
6. 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 page.



Examiner's Quick Links:	Profile Employee Independent Contracts Travel

Adding/Viewing/Editing Examiner Profile: Financial Information

The following steps are for adding, viewing, and editing financial information in your profile.

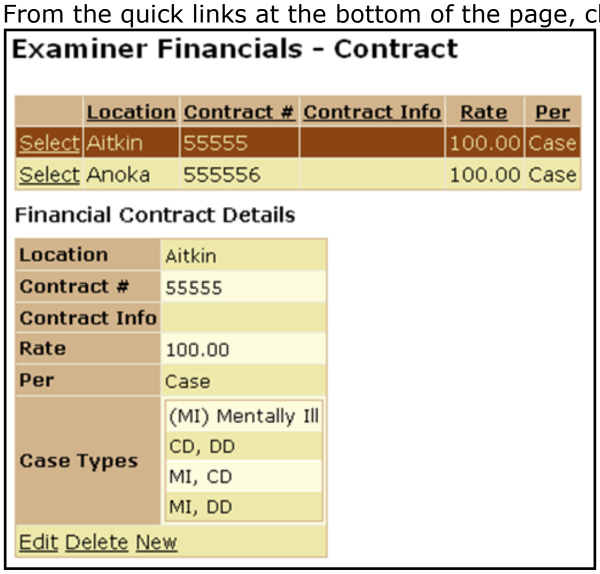
1. From the menu of options, select **Examiner** >> **Profile**. The Profile Options appear.

2. From the list of Profile Options, under Financials, select the applicable option.
   - Contract
   - Independent
   - Employee

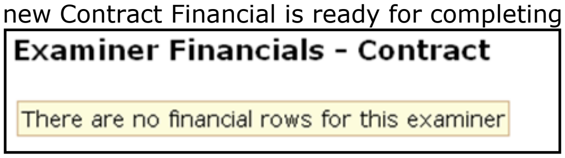
Contract Information (Examiner)

To Add Contract Information

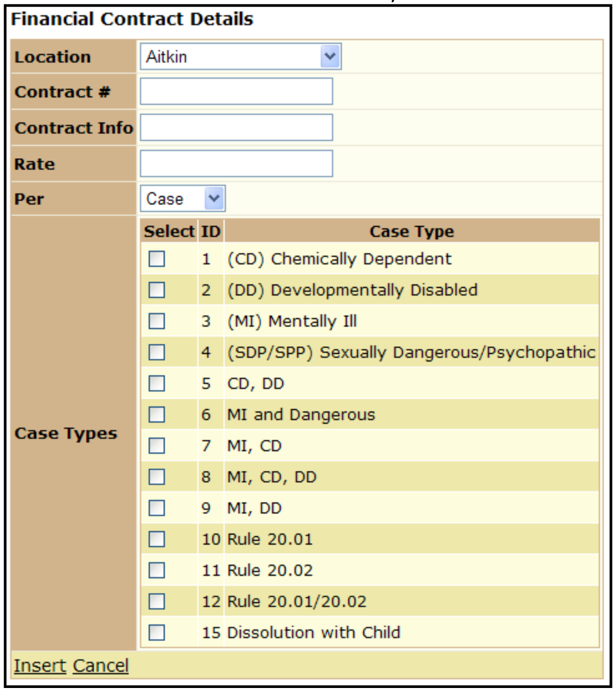
1. Under Financials, click **Contract**. The Examiner Financials and the first or only listed Financial Contract Details appear.
   OR
   From the quick links at the bottom of the page, click **Contract**.



   a. If there are 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.


Financial Contract Details

Location	Aitkin
Contract #	
Contract Info	
Rate	
Per	Case
Case Types	

Select	ID	Case Type
☐	1	(CD) Chemically Dependent
☐	2	(DD) Developmentally Disabled
☐	3	(MI) Mentally Ill
☐	4	(SDP/SPP) Sexually Dangerous/Psychopathic
☐	5	CD, DD
☐	6	MI and Dangerous
☐	7	MI, CD
☐	8	MI, CD, DD
☐	9	MI, DD
☐	10	Rule 20.01
☐	11	Rule 20.02
☐	12	Rule 20.01/20.02
☐	15	Dissolution with Child

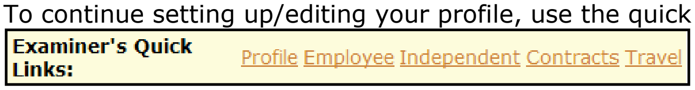
Insert Cancel

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 use a dollar symbol.
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.

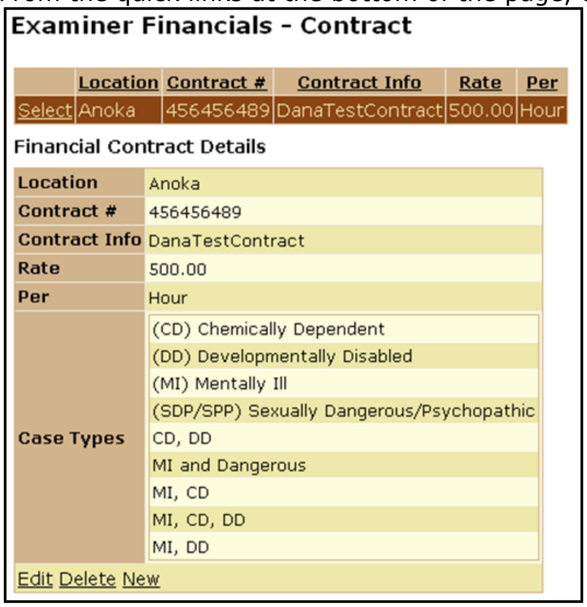
4. To save your changes, click **Insert**. The new contract is added to the list of contracts. You are returned to the Examiner Financials and the first or only listed Financial Contract Details.
   OR
   To exit without saving your changes, click **Cancel**.

5. 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 page.



To View/Edit 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**.



Examiner Financials - Contract

	Location	Contract #	Contract Info	Rate	Per
Select	Anoka	456456489	DanaTestContract	500.00	Hour

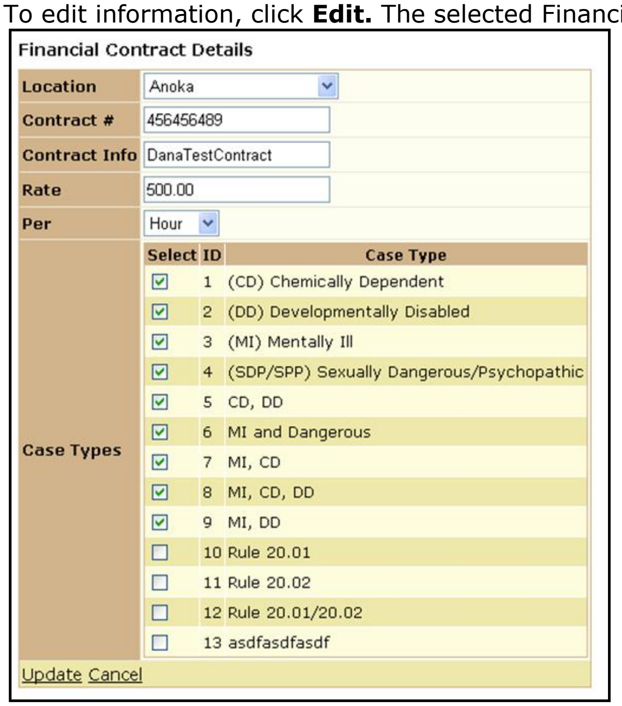
Financial Contract Details

Location	Anoka
Contract #	456456489
Contract Info	DanaTestContract
Rate	500.00
Per	Hour
Case Types	(CD) Chemically Dependent
	(DD) Developmentally Disabled
	(MI) Mentally Ill
	(SDP/SPP) Sexually Dangerous/Psychopathic
	CD, DD
	MI and Dangerous
	MI, CD
	MI, CD, DD
	MI, DD

Edit Delete New

   a. If you have more than one contract listed, at the top of the page, on the left-hand side of the desired selection, click **Select**. The selected Financial Contract Details appears below.

2. To edit information, click **Edit.** The selected Financial Contract Details page opens for editing.



Financial Contract Details

Location	Anoka
Contract #	456456489
Contract Info	DanaTestContract
Rate	500.00
Per	Hour

Case Types

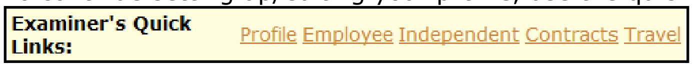
Select	ID	Case Type
☑	1	(CD) Chemically Dependent
☑	2	(DD) Developmentally Disabled
☑	3	(MI) Mentally Ill
☑	4	(SDP/SPP) Sexually Dangerous/Psychopathic
☑	5	CD, DD
☑	6	MI and Dangerous
☑	7	MI, CD
☑	8	MI, CD, DD
☑	9	MI, DD
☐	10	Rule 20.01
☐	11	Rule 20.02
☐	12	Rule 20.01/20.02
☐	13	asdfasdfasdf

Update Cancel

3. Complete the applicable fields. See the above table (located in To Add Contract Information) for completing the fields.

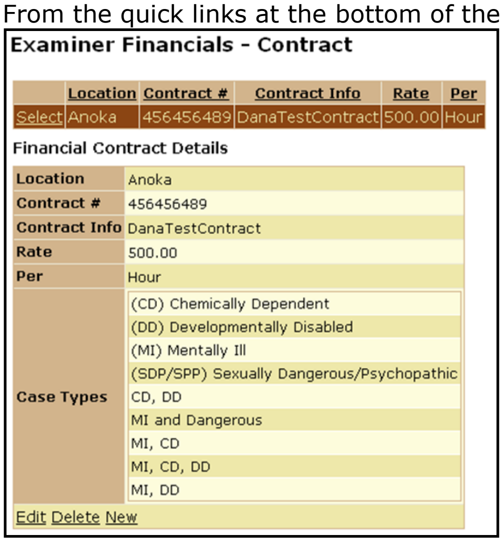
4. To save your changes, click **Update**. The editing view closes and you are returned to the Examiner Financials and the first or only listed Financial Contract Details.

5. 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 page.



To Delete 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**.



Examiner Financials - Contract

	Location	Contract #	Contract Info	Rate	Per
Select	Anoka	456456489	DanaTestContract	500.00	Hour

Financial Contract Details

Location	Anoka
Contract #	456456489
Contract Info	DanaTestContract
Rate	500.00
Per	Hour
Case Types	(CD) Chemically Dependent (DD) Developmentally Disabled (MI) Mentally Ill (SDP/SPP) Sexually Dangerous/Psychopathic CD, DD MI and Dangerous MI, CD MI, CD, DD MI, DD

Edit Delete New

   a. If you have more than one contract listed, at the top of the page, on the left-hand side of the desired selection, click **Select**. The selected Financial Contract Details appear below.

2. To delete the selected information, click **Delete.** The selected contract and all details are deleted and you are returned back to the Examiner Financials and the first or only listed Financial Contract Details.

> **Important:**
> Use caution when deleting; you will not be given a warning or a second chance after you click delete. Please verify all items before deleting.

3. 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 page.

Independent Information (Examiner)

To Add 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**.

   Examiner Financials - Independent

	Rate	Per
Select	110.00	Case
Select	150.00	Hour

   Financial Independent Details

   Note: If you are unable to select a case type, it is probably defined under a different rate.

Rate	110.00
Per	Case
Case Types	CD, DD MI, CD, DD
Edit Delete New	

   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.

   Examiner Financials - Independent

   There are no financial rows for this examiner

2. To add a new Independent Financial, click **New**. The Financial Independent Details appear.

   Financial Independent Details

   Note: If you are unable to select a case type, it is probably defined under a different rate.

   Rate

   Per Case

   Case Types

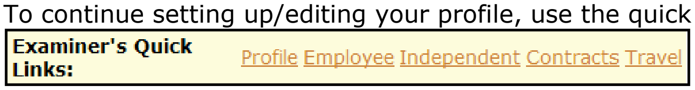
Select	ID	Case Type
☐	1	(CD) Chemically Dependent
☐	2	(DD) Developmentally Disabled
☐	3	(MI) Mentally Ill
☐	4	(SDP/SPP) Sexually Dangerous/Psychopathic
☐	5	CD, DD
☐	6	MI and Dangerous
☐	7	MI, CD
☐	8	MI, CD, DD
☐	9	MI, DD
☐	10	Rule 20.01
☐	11	Rule 20.02
☐	12	Rule 20.01/20.02
☐	15	Dissolution with Child

   Insert Cancel

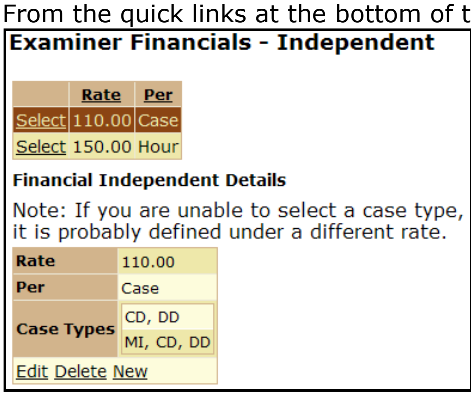
3. Complete the applicable fields.

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.
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.

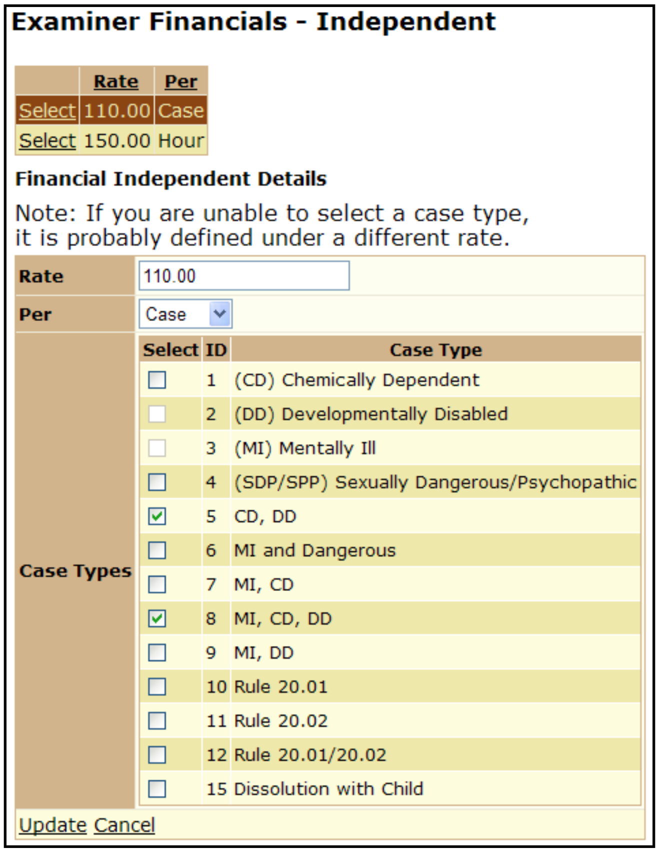
4. To save your changes, click **Insert**. The new independent is added to the list of independents and you are returned to the Examiner Financials and the first or only listed Financial Independent Details.
   OR
   To exit without saving your changes, click **Cancel**.
5. When completed, use the main 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 page.
   

To View/Edit 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 you have more than one independent listed, at the top of the page, on the left-hand side of the desired selection, click **Select**. The selected Financial Independent Details appears below.

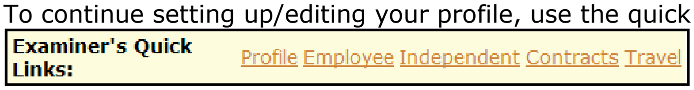
2. To edit information, click **Edit.** The Financial Independent Details page opens for editing.



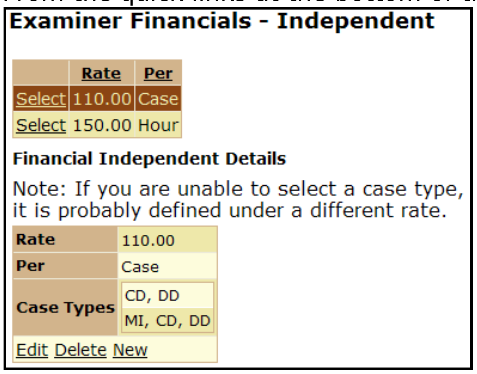
3. Complete the applicable fields. See the above table (located in To Add Independent Information) for completing the fields.

4. To save your changes, click **Update**. The editing view closes and you are returned to the Examiner Financials and the first or only listed Financial Independent Details.

5. 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 page.

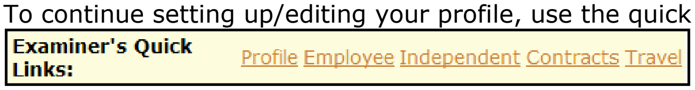


To Delete Independent Information

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**.
   

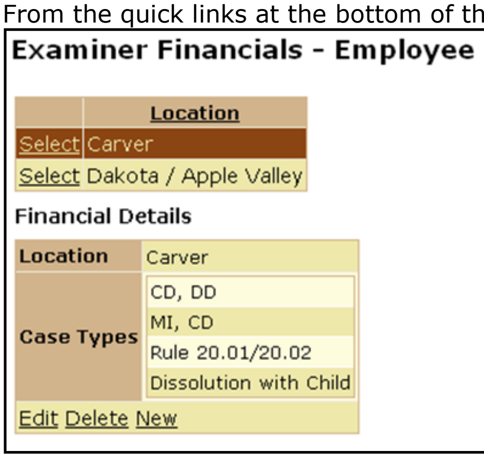
   a. If you have more than one independent listed, at the top of the page, on the left-hand side of the desired selection, click **Select**. The selected Financial Independent Details appear below.
2. To delete the selected information, click **Delete.** The independent is deleted and you are returned to the Examiner Financials and the first or only listed Financial Independent Details.

> **Important:**
> Use caution when deleting; you will not be given a warning or a second chance after you click delete. Please verify all items before deleting.

3. 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 page.
   

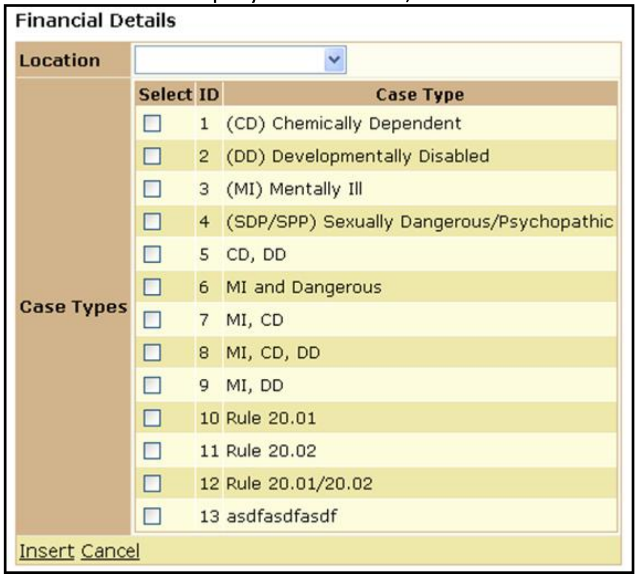
Employee Information (Examiner)

To Add 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.

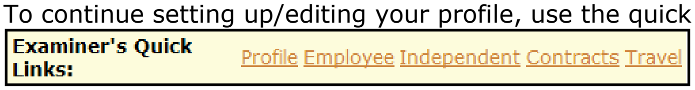


3. Complete the applicable fields.

Field	Action
Location	From the drop-down menu, select an option.
Case Types	From the checkboxes, select all applicable options.

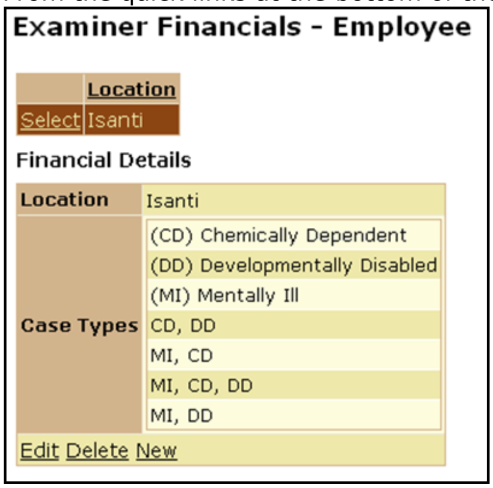
4. To save your changes, click **Insert**. The new financial information is added to the list and you are returned to the Examiner Financials and the first or only listed Financial Details.
OR
To exit without saving your changes, click **Cancel**.

5. 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 page.



To View/Edit 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**.



Examiner Financials - Employee

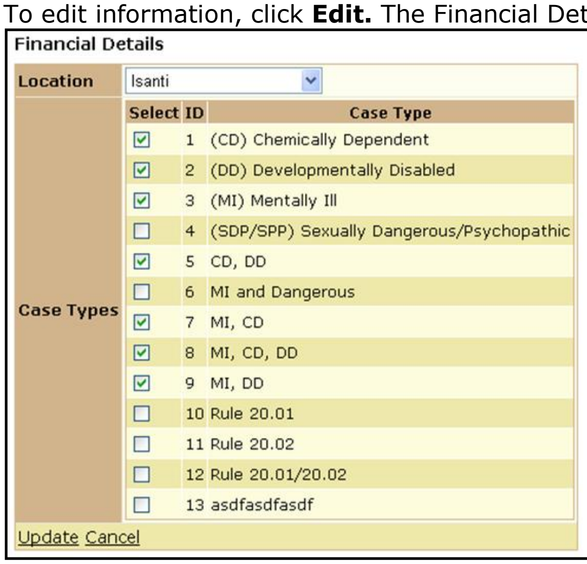
	Location
Select	Isanti

Financial Details

Location	Isanti
Case Types	(CD) Chemically Dependent (DD) Developmentally Disabled (MI) Mentally Ill CD, DD MI, CD MI, CD, DD MI, DD
Edit Delete New	

   b. If you have more than one Financial listed, at the top of the page, on the left-hand side of the desired selection, click **Select**. The selected Financial Details appear below.

2. To edit information, click **Edit.** The Financial Details page opens for editing.



Financial Details

Location: Isanti

Case Types:

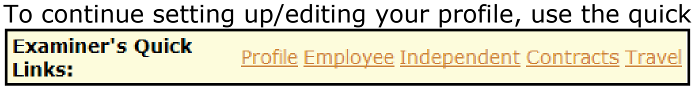
Select	ID	Case Type
☑	1	(CD) Chemically Dependent
☑	2	(DD) Developmentally Disabled
☑	3	(MI) Mentally Ill
☐	4	(SDP/SPP) Sexually Dangerous/Psychopathic
☑	5	CD, DD
☐	6	MI and Dangerous
☑	7	MI, CD
☑	8	MI, CD, DD
☑	9	MI, DD
☐	10	Rule 20.01
☐	11	Rule 20.02
☐	12	Rule 20.01/20.02
☐	13	asdfasdfasdf

Update Cancel

3. Complete the applicable fields. See the above table (located in To Add Employee Information) for completing the fields.

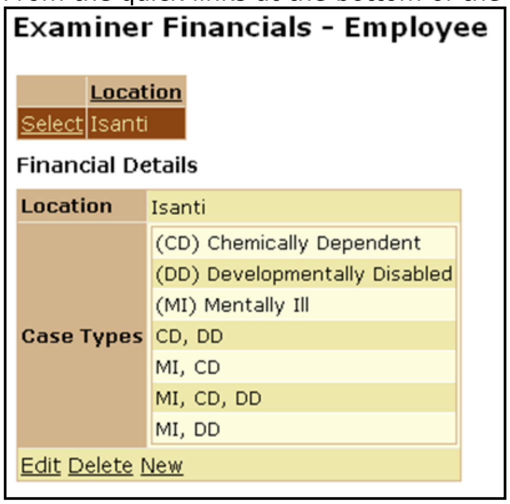
4. To save your changes, click **Update**. The editing view closes and you are returned to the Examiner Financials and the first or only listed Financial Details.

5. 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 page.



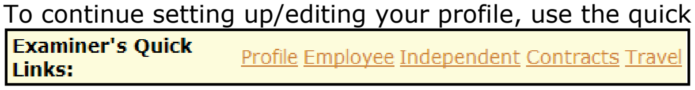
Examiner's Quick Links:	Profile Employee Independent Contracts Travel

To Delete 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 you have more than one listed, on the left-hand side of the desired selection, click **Select**. The selected Financial Details appear below.
2. To delete the selected information, click **Delete.** The information is deleted and you are returned to the Examiner Financials and the first or only listed Financial Details.

   Important:
   Use caution when deleting; you will not be given a warning or a second chance after you click delete. Please verify all items before deleting.

3. 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 page.
   

Invoices

Overview of Invoices

In most cases, the examiner's services are concluded in 72 hours to 2 weeks; at which time the examiner submits his/her bill for the case and closes the file. By completing an invoice, the examiner submits his/her bills as necessary.

After the examiner submits the invoice, an email notification is sent to the county-level approver at the county courthouse indicating that the invoice is ready for approval. If the invoice is approved, an email notification is then sent to the district-level approver indicating that the invoice is ready for approval. If the invoice is approved by the district-level approver, the invoicing process is then complete.

If your invoice is not approved by one of the approvers, an email is sent to you indicating the reason. This allows you to correct and then resubmit the invoice.

> **Note:**
> It is recommended that you submit invoices on a regular basis – whether that is once a week, every 2 weeks, or monthly. Use the frequency that works best for you. It is also recommended that you enter all of your work on a single invoice rather than opening several invoices at once.

> **Important:**
> In efforts to clean up data and to speed up the process of submitted invoices, if the approver discovers small but obvious mistakes, they are encouraged to fix them (e.g., if a telephone call is billed for "9" hours instead of ".9"). If they discover larger mistakes, they will do their best to work with you to correct them as applicable (e.g., proper case style or hours at location).

Entering an Invoice

There are three different types of invoices: Employee Invoice, Contract Invoice, and Independent Invoice. To submit an invoice, follow the applicable steps below. Some sections are required, while some are optional.

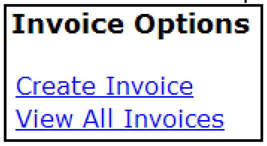
Invoice Type	Description
Employee Invoice	This type of invoice is for examiners that are employees. The employee enters the time spent for each service. This type of invoice collects data rather than describing the method in which the examiner is paid.
Contract Invoice	This type of invoice is for examiners who hold contracts for service with the state or district. The contract examiner enters the time spent for each service. If applicable, an alternate rate is entered as well. This type of invoice describes the way in which the examiner is paid, which is different from an employee invoice.
Independent Invoice	This type of invoice is for examiners who are independent examiners. The independent examiner enters the time spent for each service. If applicable, an alternate rate is entered as well. This type of invoice describes the way in which the examiner is paid, which is different from an employee invoice.

> **Notes:**
> - If you do not complete an invoice and exit from the system, to access the incomplete invoice see the instructions for viewing invoices. You will see the invoice status as "Incomplete" and will be able to continue adding information to it.
> - You may print your invoice at any time. In the header of the invoice on the Invoice Main Page screen, click the **View/Print Invoice Detail** hyperlink. The invoice opens in another browser window and you may view or print it. It will open in an expanded format to show all details. You can collapse specific counties or districts to view/print only the information you need.
> - Invoices submitted under a contract will have to be specific to that contract and will not be able to include work done outside of it. Independent contractors may create invoices with multiple cases in multiple counties.

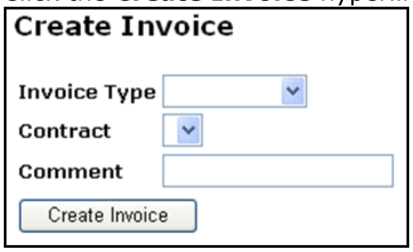
- Step One: Select an Invoice Type
- Step Two: Complete the Cases Section (required)
- Step Three: Complete the Exams Section (required)
- Step Four: Complete the Services Section (required)
- Step Five: Complete the Mileage Section (if applicable)
- Step Six: Complete the Extraordinary Charges Section (if applicable)
- Step Seven: Submit the Invoice

Step One: Select an Invoice Type

1. From the menu of options, select **Examiner** >> **Invoices**. The Invoice Options appear.



2. Click the **Create Invoice** hyperlink. The Create Invoice screen appears.



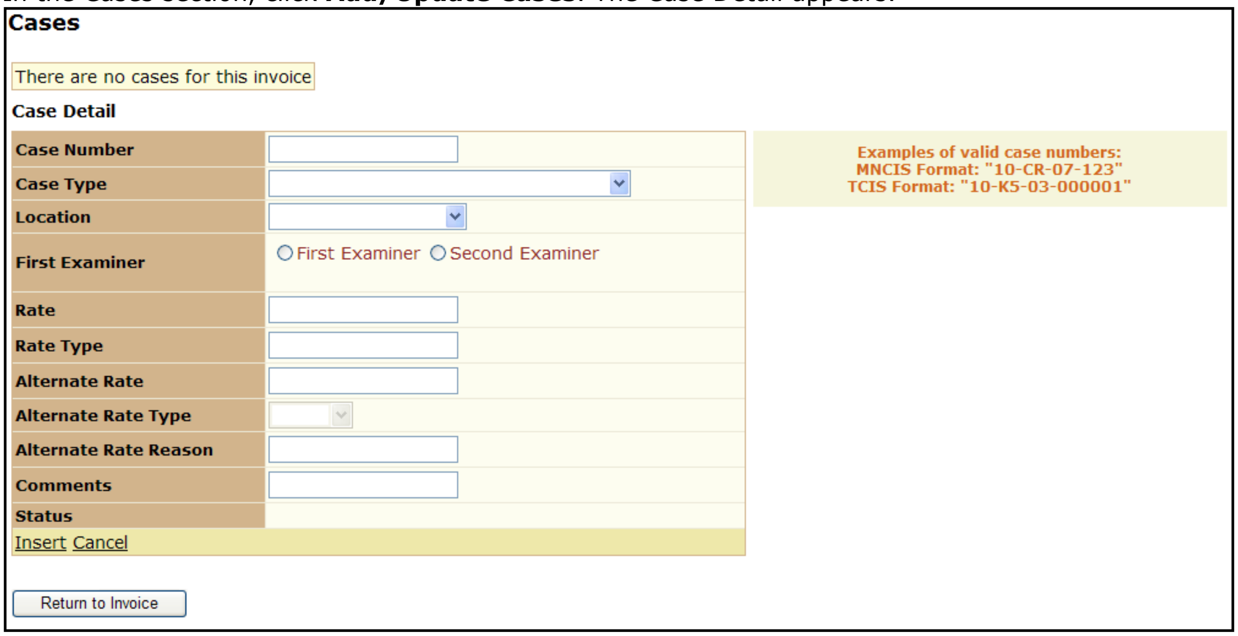
3. To create a new invoice, from the Invoice Type drop-down menu, select the applicable invoice type. For more information on each invoice type, see the table at the beginning of this section.

Invoice Type	Fields
Contract	Complete the following fields: • **Contract:** From the drop-down menu, select an option. • **Comment:** It is recommended to provide a meaningful reference to the case. For example, this field can be used to indicate the proposed patient's name, county, or date. Provide anything that will be useful for you when viewing your cases list.
Independent	Complete the **Comment** field. It is recommended to provide a meaningful reference to the case. For example, this field can be used to indicate the proposed patient's name, county, or date. Provide anything that will be useful for you when viewing your cases list.
Employee	Complete the **Comment** field. It is recommended to provide a meaningful reference to the case. For example, this field can be used to indicate the proposed patient's name, county, or date. Provide anything that will be useful for you when viewing your cases list.

4. Click **Create Invoice**. The Invoice Main Page screen appears. The Invoice Header and Examiner Info. sections contain information about the invoice that you are creating; however, this information is not editable. It is for review purposes only.

Step Two: Complete the Cases Section (required)

1. In the Cases section, click **Add/Update Cases**. The Case Detail appears.



2. To add new case information, complete the required fields.

Field	Action/Description
Case Number	This is a required field. Type in the case number. **Note:** Use the correct case format. Refer to the examples on the screen within the application.
Case Type	This is a required field. From the drop-down menu, select a case type option. **Important:** If you select a case type that is not in your financial profile, the system displays an error and gray's everything out. To exit the error, on the browser bar, click Back. To add that case type and rate to your profile, you must navigate to your profile and add it, and then return to completing the invoice.
Location	This is a required field. From the drop-down option, select an option.
First Examiner	This is a required field. From the radio buttons, select the applicable option.
Rate	The rate that you have previously indicated in your financial profile is populated in this field.
Rate Type	The rate type that you have previously indicated in your profile is populated in this field. If you are using an alternate rate type, use the Alternate Rate Type and Alternate Rate Reason fields, see below.
Alternate Rate	If you are charging a rate that is different from the rate found within your profile in the system, provide it in this field. For example, an alternate rate would be used on a case type that you normally perform for $200.00, but for some reason (i.e., rate agreed by court) you are going to be charging $300.00. **Important:** If you are using an alternative rate, you must indicate an alternative rate type below.
Alternate Rate Type	If you are using an alternate rate type, from the drop-down option, select an option.
Alternate Rate Reason	If you are using an alternate rate type, type your reason. This is required if an alternate rate is entered.
Comments	If you have any additional comments, type them in this field.

3. To save the information, click the **Insert** hyperlink.
   Note: Once you click insert, the case gets added to a table at the top and other options appear.

Cases

	ID	Case Number	Case Type	Location	First Examiner	Rate	Rate Type	Alternate Rate	Alternate Rate Type	Alternate Rate Reason	Comments	Status
Select	305	345345354	(CD) Chemically Dependent	Anoka	☑	0.00		0.00				Pending…

Case Detail

Case Number	345345354
Case Type	(CD) Chemically Dependent
Location	Anoka
First Examiner	☑
Rate	0.00
Rate Type	
Alternate Rate	0.00
Alternate Rate Type	
Alternate Rate Reason	
Comments	
Status	1

Edit Delete New

Examples of valid case numbers:
MNCIS Format: "10-CR-07-123"
TCIS Format: "10-K5-03-000001"

Return to Invoice

4. To add any more cases, click the **New** hyperlink. A new set of fields opens for completing.

Cases

	ID	Case Number	Case Type	Location	First Examiner	Rate	Rate Type	Alternate Rate	Alternate Rate Type	Alternate Rate Reason	Comments	Status
Select	305	345345354	(CD) Chemically Dependent	Anoka	☑	0.00		0.00				Pending…

Case Detail

Case Number	
Case Type	
Location	
First Examiner	○ First Examiner ○ Second Examiner
Rate	
Rate Type	
Alternate Rate	
Alternate Rate Type	
Alternate Rate Reason	
Comments	
Status	

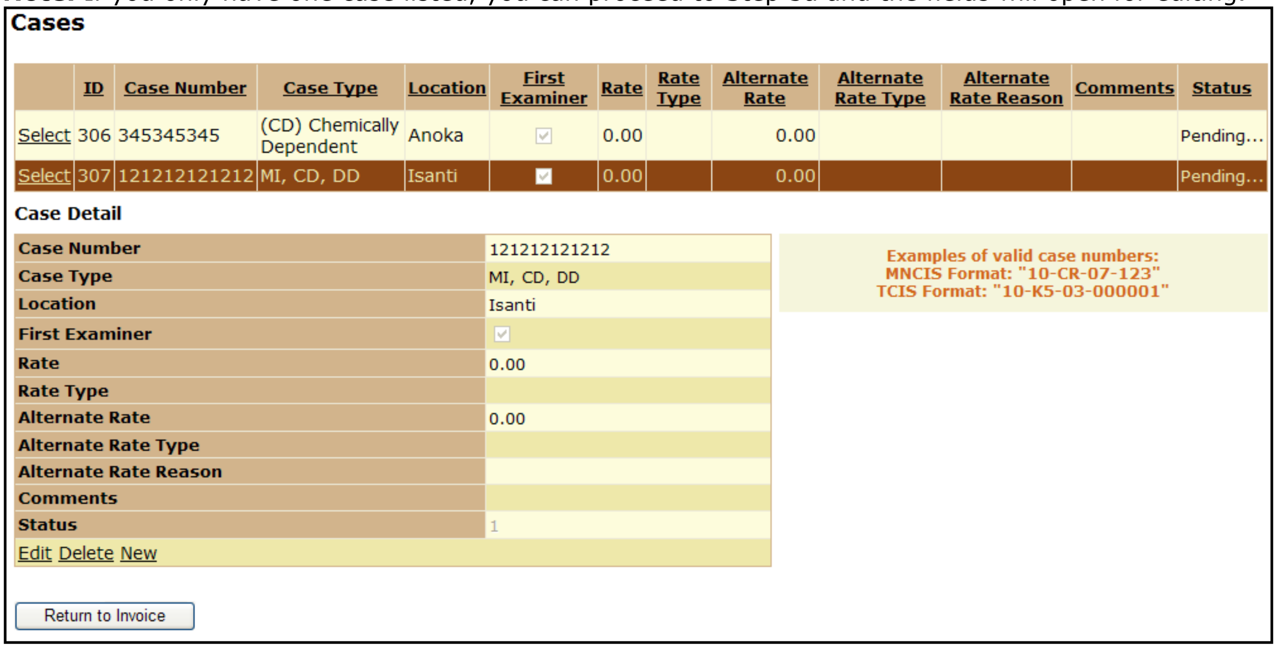
Insert Cancel

Examples of valid case numbers:
MNCIS Format: "10-CR-07-123"
TCIS Format: "10-K5-03-000001"

Return to Invoice

   a. Repeat Steps 2-3 until all cases are entered.

5. If you need to edit any existing cases, first locate the case you would like to edit, and click the **Select** hyperlink. Now the selected case information appears in the table below the case list.
   Note: If you only have one case listed, you can proceed to Step 5a and the fields will open for editing.



   a. Click the **Edit** hyperlink. The fields open for editing.
   b. Make the necessary changes. See the above table (located in Step 2) for completing the fields.
   c. To save the changes, click **Update**.
   d. Click **Return to Invoice**.

6. To delete any existing cases, first locate the case you would like to delete, and click the **Select** hyperlink. Now the selected case information appears in the table below the case list.
   a. Click the **Delete** hyperlink. The case information is deleted.

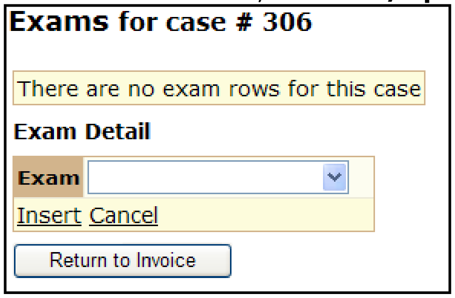
Warning:
Use caution when deleting; you will not be given a warning or a second chance after you click delete. If you delete a case, all associated items with that case (e.g., all services, activities, charges) will be deleted as well. Verify all items before clicking delete.

7. To return to the main invoice, click **Return to Invoice**. You are returned to the invoice and the Cases section is populated with the new/revised case information.

Step Three: Complete the Exams Section (required)

1. To activate the Exams section, in the Cases section, verify that you have selected the applicable case or that it is already selected.

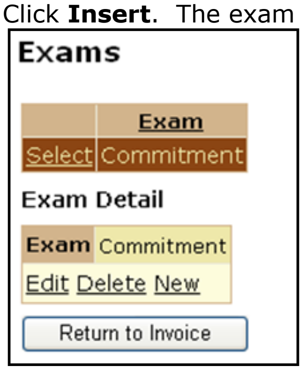
2. In the Exams section, click **Add/Update Exams**. The Exam Detail appears.



3. To add new exam detail, from the Exam drop-down menu, select an exam option.

Exam	Description
0.12	Examination at the time of the 60 day report after commitment commenced.
0.17	Examination concerning the patient's request for a change in or release from commitment.
Commitment	Examination performed when a person is being considered for civil commitment.
Commitment/Jarvis	Examination to address both Commitment and Jarvis issues.
Commitment/Price	Examination to address both Commitment and Price issues.
Commitment/Price/Jarvis	Examination to address Commitment, Price, and Jarvis issues.
Jarvis	Examination performed to determine whether a patient meets the standard for forced medication.
Price	Examination performed to determine whether the patient meets the standard for ECT.
Price/Jarvis	Examination to address both Jarvis and Price issues.

4. Click **Insert**. The exam detail is saved.



5. To add another exam detail, click **New**. A new Exam Detail appears.
    a. Repeat Steps 3-4 until all exams are entered.
6. To edit any existing exams, first locate the exam you would like to edit, and click the **Select** hyperlink. Now the selected exam information appears in the table below the exam list.
Note: If you only have one exam listed, you can proceed to Step 6a and the fields will open for editing.
    a. Click the **Edit** hyperlink. The fields open for editing.
    b. Make the necessary changes.
    c. To save the changes, click **Update**.
    d. Click **Return to Invoice**.
7. To delete any existing exams, first locate the exam you would like to delete, and click the **Select** hyperlink. Now the selected exam information appears in the table below the exam list.

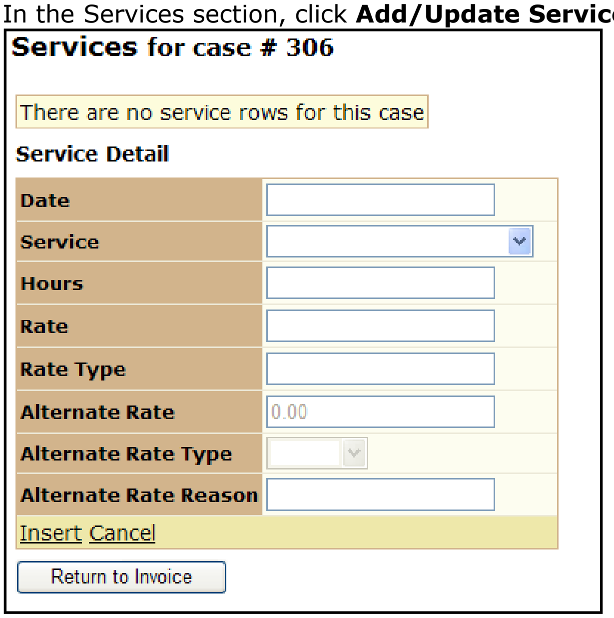
   a. Click the **Delete** hyperlink. The exam information is deleted.

8. To return to the main invoice, click **Return to Invoice**. You are returned to the invoice and the Exams section is populated with the new/revised exam information.

Step Four: Complete the Services Section (required)

> **Important:**
> Enter all services performed on each separate case.

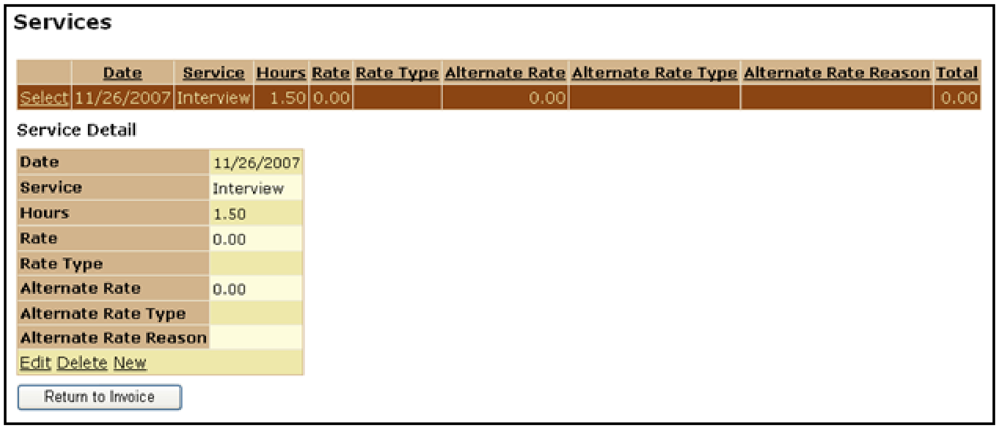
1. To activate the Services section, in the Cases section, verify that you have selected the applicable case or that it is already selected.
2. In the Services section, click **Add/Update Services**. The Service Detail appears.



3. To add new service detail, complete the required fields.

Field	Action
Date	Provide the date of the service. The recommended date format is: mm/dd/yyyy.
Service	From the drop-down menu, select the type of service (e.g., interview, testimony in court, etc.). Do not select “Other service” unless none of the other options appropriately fit the service that was performed.
Hours	Provide the time that you spent on this service in .25 hour increments. Round up to the nearest .25 increment, as applicable.
Rate	This information will be automatically populated from your normal rate in the system or from the alternate rate, if provided.
Rate Type	This information will be automatically populated from your normal rate in the system or from the alternate rate, if provided.
Alternate Rate	Provide the alternate rate for the service, if applicable.
Alternate Rate Type	Provide the alternate rate type for the service, if applicable. For example, per hour or per service.
Alternate Rate Reason	Provide the alternate rate reason for the service, if applicable.

4. Click **Insert**. The service detail is saved.



Services

	Date	Service	Hours	Rate	Rate Type	Alternate Rate	Alternate Rate Type	Alternate Rate Reason	Total
Select	11/26/2007	Interview	1.50	0.00		0.00			0.00

Service Detail

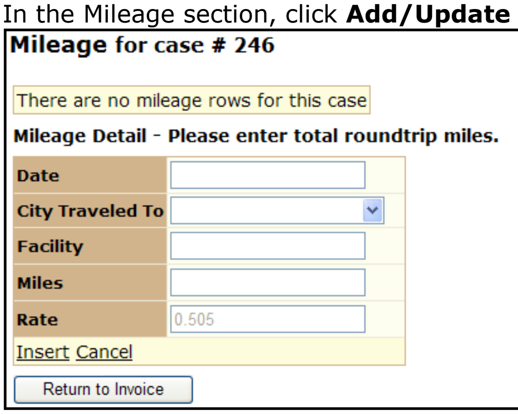
Date	11/26/2007
Service	Interview
Hours	1.50
Rate	0.00
Rate Type	
Alternate Rate	0.00
Alternate Rate Type	
Alternate Rate Reason	
Edit Delete New	

Return to Invoice

5. To add another service detail, click **New**. A new Service Detail appears.
    a. Repeat Steps 3-4 until all services are added.
6. To edit any existing services, first locate the service you would like to edit, and click the **Select** hyperlink. Now the selected service information appears in the table below the service list.
   Note: If you only have one service listed, you can proceed to Step 6a and the fields will open for editing.
    a. Click the **Edit** hyperlink. The fields open for editing.
    b. Make the necessary changes.
    c. To save the changes, click **Update**.
    d. Click **Return to Invoice**.
7. To delete any existing services, first locate the services you'd like to delete, and click the **Select** hyperlink. Now the selected services information appears in the table below the services list.
    a. Click the **Delete** hyperlink. The service information is deleted.
8. To return to the main invoice, click **Return to Invoice**. You are returned to the invoice and the Services section is populated with the new/revised services information.

Step Five: Complete the Mileage Section (if applicable)

1. To activate the Mileage section, in the Cases section, verify that you have selected the applicable case or that it is already selected.
2. In the Mileage section, click **Add/Update Mileage**. The Mileage Detail appears.



Mileage for case # 246

There are no mileage rows for this case

Mileage Detail - Please enter total roundtrip miles.

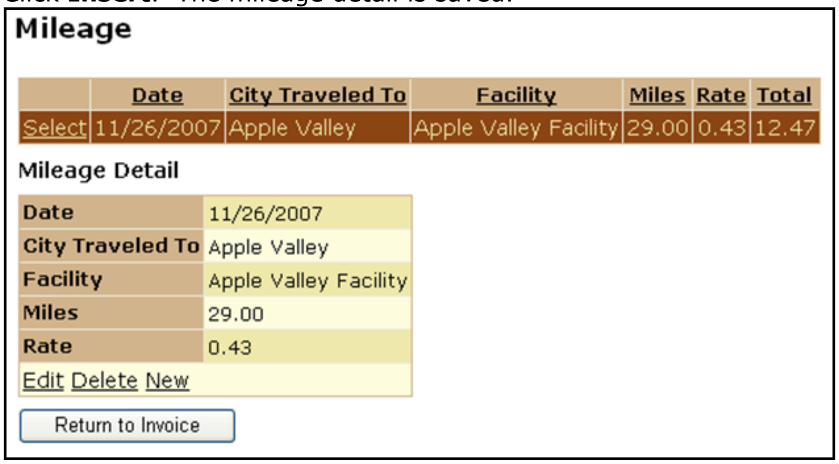
Date	
City Traveled To	
Facility	
Miles	
Rate	0.505
Insert Cancel	

Return to Invoice

3. To add new mileage detail, complete the required fields.

Field	Action
Date	Provide the date that the trip took place. The recommended date format is: mm/dd/yyyy.
City Traveled to	From the drop-down menu, select the city to which you traveled.
Facility	Provide the facility that you visited.
Miles	Provide the miles for your roundtrip. This means the total miles.
Rate	This field is automatically populated with the current mileage reimbursement rate. It is not editable.

4. Click **Insert**. The mileage detail is saved.

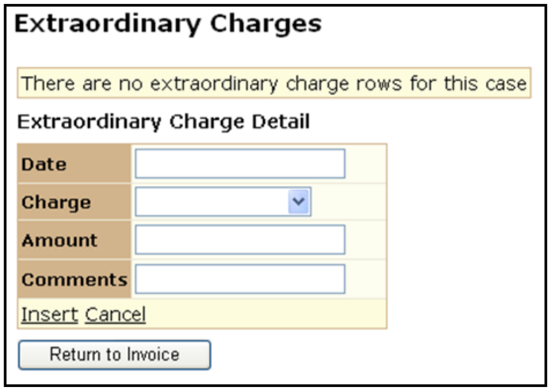


5. To add another mileage detail, click **New**. A new Mileage Detail appears.
   a. Repeat Steps 3-4 until all mileage is entered.
6. To edit any existing mileage, first locate the mileage entry you would like to edit, and click the **Select** hyperlink. Now the selected mileage information appears in the table below the mileage list. **Note:** If you only have one mileage detail listed, you can proceed to Step 6a and the fields will open for editing.
   a. Click the **Edit** hyperlink. The fields open for editing.
   b. Make the necessary changes.
   c. To save the changes, click **Update**.
   d. Click **Return to Invoice**.
7. To delete any existing mileage details, first locate the mileage detail you would like to delete, and click the **Select** hyperlink. Now the selected mileage information appears in the table below the mileage list.
   a. Click the **Delete** hyperlink. The mileage information is deleted.
8. To return to the main invoice, click **Return to Invoice**. You are returned to the invoice and the Mileage section is populated with the new/revised mileage information.

Step Six: Complete the Extraordinary Charges Section (if applicable)

> **Note:**
> If you anticipate extraordinary charges, your county or district may request prior authorization for those charges.

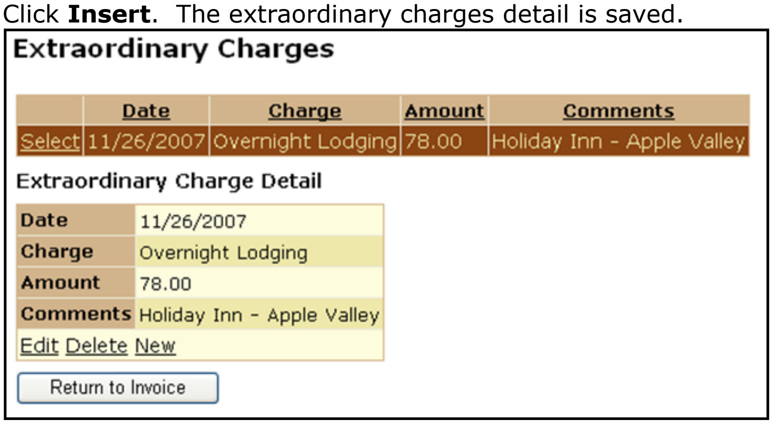
1. To activate the Extraordinary Charges section, in the Cases section, verify that you have selected the applicable case or that it is already selected.
2. In the Extraordinary Charges section, click **Add/Update Extraordinary Charges**. The Extraordinary Charge Detail appears.



3. To add new extraordinary charge detail, complete the required fields.

Field	Action
Date	Provide the date that the charge incurred. The recommended date format is: mm/dd/yyyy.
Charge	From the drop-down menu, select an applicable charge (e.g., meals, photocopying, etc.).
Amount	Provide the exact amount of the charge.
Comments	Provide a comment that will further describe the charge, if applicable.

4. Click **Insert**. The extraordinary charges detail is saved.



5. To add another extraordinary charges detail, click **New**. A new Extraordinary Charge Detail appears.
    a. Repeat Steps 3-4 until all extraordinary charges are entered.
6. To edit any existing extraordinary charges, first locate the extraordinary charges you would like to edit, and click the **Select** hyperlink. Now the selected extraordinary charges information appears in the table below the extraordinary charges list.
   Note: If you only have one extraordinary charges detail listed, you can proceed to Step 6a and the fields will open for editing.
    a. Click the **Edit** hyperlink. The fields open for editing.
    b. Make the necessary changes.
    c. To save the changes, click **Update**.
    d. Click **Return to Invoice**.

7. To delete any existing extraordinary charges details, first locate the extraordinary charges detail you would like to delete, and click the **Select** hyperlink. Now the selected extraordinary charges information appears in the table below the extraordinary charges list.
    a. Click the **Delete** hyperlink. The extraordinary charges information is deleted.
8. To return to the main invoice, click **Return to Invoice**. You are returned to the invoice and the Extraordinary Charges section is populated with the new/revised extraordinary charges information.

Step Seven: Submit the Invoice

Important:
Verify that you have reviewed all of your entries and that the figures are accurately reflecting all work done on the file (i.e., make sure that all services are properly entered for each case and that the total hours reflect the work completed). If they are incorrect, it may slow down the invoice submitting process.

1. Before submitting the invoice, you can view the case summary and invoice summary. At the bottom of the screen containing all the information for the selected invoice, a Case Summary and Invoice Summary are displayed.

    Note:
    Depending on the case that is currently selected, the Case Summary will display that case's information. If there are several cases on the invoice, this summary will change when selecting different cases. However, the Invoice Summary will always stay the same since it is the complete total of the entire invoice.

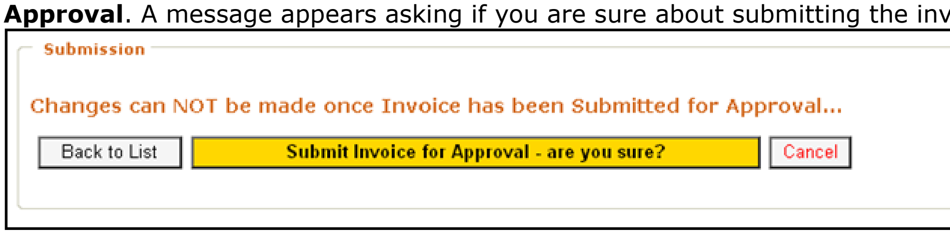
Case Summary

Invoice	Case Number	Category	Total Hours	Total Amount
86		Extraordinary Charges	0.00	78.00
86		Mileage	0.00	12.47
86		Services	1.50	0.00

Invoice Summary

Invoice	Total Hours	Total Amount
86	1.50	90.47

2. When you are ready to submit the invoice, in the Submission section, click **Submit Invoice for Approval**. A message appears asking if you are sure about submitting the invoice.



3. If you are sure, click **Submit Invoice for Approval – are you sure**. A message appears stating that the invoice has been submitted.

4. To exit the current invoice, click **Back to List**. You are returned to the list of invoices.
    OR
    To exit the invoices section, using the main toolbar, navigate to your desired location.

Viewing Invoices

If you want to view the status of an invoice that you have already submitted, view an invoice that has been denied, or view an invoice that you have not fully completed, please follow the applicable steps below. You can also use this viewing invoices option to fix errors in a denied invoice and resubmit it.

> **Important:**
> Updates cannot be made to an invoice if it has already been submitted for approval. If you select an invoice with a status such as this, a message will appear stating that you cannot make modifications at this time. You can only make updates to invoices that have been denied or is incomplete and need to be corrected.

1. From the menu of options, select **Examiner** >> **Invoices**. The Invoice Options appear.

   Invoice Options

   Create Invoice
   View All Invoices

2. To view an invoice, click the **View All Invoices** hyperlink. A list of invoices appears.

   Invoice List for Examiner, Ashley

	Invoice #	Submission Date	Comments	Contract Number	Status
Select	259				Incomplete
Select	260				Incomplete
Select	262	5/14/2008	Test		Submitted
Select	261	5/14/2008			Approval Denied

Status	Description
Submitted	Indicates that the invoice has been submitted by the examiner.
Incomplete	Indicates that the examiner has not yet submitted the invoice for approval.
Approval Denied	Indicates that the invoice has been denied by one of the approvers. It is returned to the examiner for additional information or corrections.
Approved by County	Indicates that the first approval has been successful and completed.
Approved by District	Indicates that the final approval has been completed and the invoice is ready to be entered into MAPS. **This is the final step in the approval invoice process.**

3. To select an invoice, click the **Select** hyperlink to the left of the invoice. The selected invoice appears.

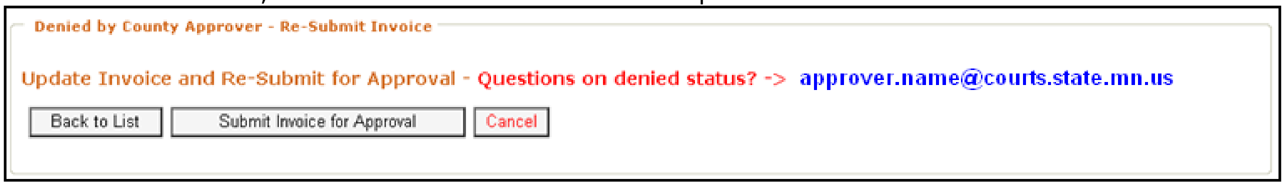
4. To view specific information, under the Cases header of the desired case, click the **Select** hyperlink. The selected information appears below.

   Cases

	ID	Case Type	Location	Case Number	First Examiner	Rate	Rate Type	Alternate Rate	Alternate Rate Type	Alternate Rate Reason	Case Comments	Status
Select	306	(CD) Chemically Dependent	Anoka	345345345	☑	0.00		0.00				Approved by County
Select	307	MI, CD, DD	Isanti	121212121212	☑	0.00		0.00				Denied

   Add/Update Cases

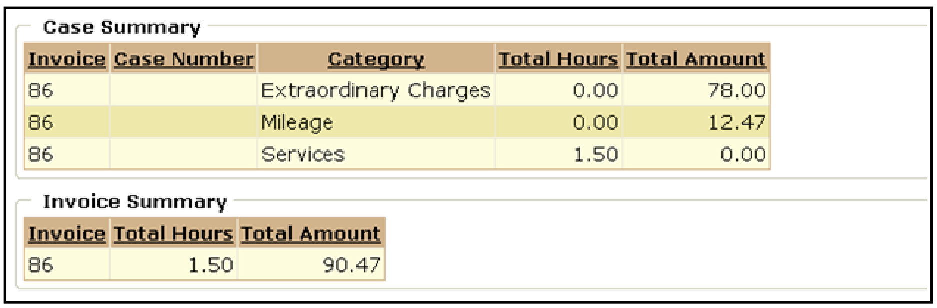
5. If the invoice has been denied by the approver, you may have received a reason for the denial in an email from the approver.
   OR
   For more information from the approver, to contact him/her on why the invoice was denied, at the bottom of the invoice, click the email address. An email opens.



   a. Complete the email and send to the approver.

6. At the bottom of the screen containing all the information for the selected invoice, a Case Summary and Invoice Summary are displayed.

> **Note:**
> Depending on the case that is currently selected, the Case Summary will display that case's information. If there are several cases on the invoice, this summary will change when selecting different cases. However, the Invoice Summary will always stay the same since it is the complete total of the entire invoice.



Case Summary

Invoice	Case Number	Category	Total Hours	Total Amount
86		Extraordinary Charges	0.00	78.00
86		Mileage	0.00	12.47
86		Services	1.50	0.00

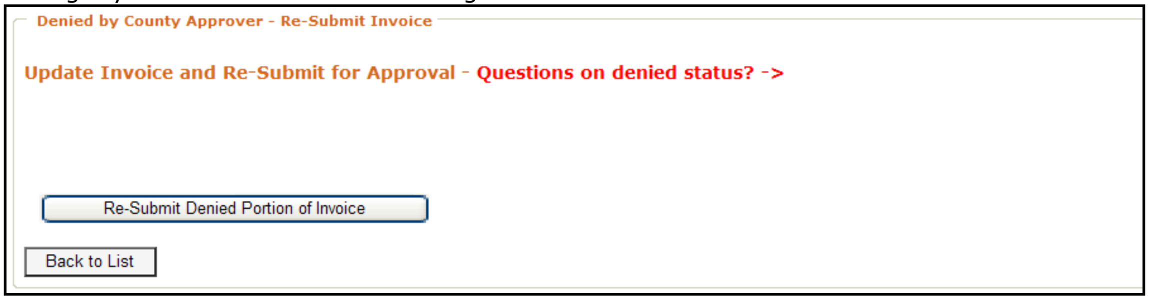
Invoice Summary

Invoice	Total Hours	Total Amount
86	1.50	90.47

7. To edit or add to an incomplete invoice or to an invoice that has been denied, follow the applicable procedure below.
   - To Add/Update Cases
   - To Add/Update Exams
   - To Add/Update Services
   - To Add/Update Mileage
   - To Add/Update Extraordinary Charges

> **Warning:**
> Use caution when deleting; you will not be given a warning or a second chance after you click delete. If you delete a case, **all** associated items with that case (e.g., all services, activities, charges) will be deleted as well. Verify all items before clicking delete.

8. Once you have corrected the errors as needed and are ready to re-submit the fixed portion of the invoice, in the submission section, click **Re-Submit Denied Portion of Invoice**. A message appears asking if you are sure about submitting the invoice.



9. If you are sure, click **Submit Invoice for Approval – are you sure**. A message appears stating that the invoice has been submitted.

10. To exit the current invoice, click **Back to List**. You are returned to the list of invoices.
    OR
    To exit the invoices section, use the main toolbar to exit or navigate to your desired location.

To Add/Update Cases

1. On the desired case, click **Add/Update Cases**. The Case Detail page appears.
2. To edit, complete the steps in Entering an Invoice, Step Two, located on Page 29.
3. When completed, use the main toolbar to exit or navigate to your desired location.

To Add/Update Exams

1. On the desired case, click **Add/Update Exams**. The Exam Detail page appears.
2. To edit, complete the steps in Entering an Invoice, Step Three, located on Page 31.
3. When completed, use the main toolbar to exit or navigate to your desired location.

To Add/Update Services

1. On the desired case, click **Add/Update Services**. The Services Detail page appears.
2. To edit, complete the steps in Entering an Invoice, Step Four, located on Page 33.
3. When completed, use the main toolbar to exit or navigate to your desired location.

To Add/Update Mileage

1. On the desired case, click **Add/Update Mileage**. The Mileage Detail page appears.
2. To edit, complete the steps in Entering an Invoice, Step Five, located on Page 34.
3. When completed, use the main toolbar to exit or navigate to your desired location.

To Add/Update Extraordinary Charges

1. On the desired case, click **Add/Update Extraordinary Charges**. The Extraordinary Charges Detail page appears.
2. To edit, complete the steps in Entering an Invoice, Step Six, located on Page 35.
3. When completed, use the main toolbar to exit or navigate to your desired location.

Approver Tools & Resources

Profile

Editing Approver Profile

Approvers are given the ability to update their own profile information. If you are a county-level or district-level approver, follow the steps below as needed.

1. From the menu of options, select **Approver** >> **Approver Profile**. The Court Staff Name screen appears with the name profile information.
2. To edit any information, use the Approver's Quick Links and follow the applicable steps below.
   - To Update Profile
   - To Update District Approval
   - To Update County Approval
3. When completed, use the Approver's Quick Links at the bottom of the screen or use the main toolbar to navigate to your desired location.

To Update Approver's Profile

1. To edit the profile, follow the steps in setting up an approver's profile (start at step 2), located on Page 64.

To Update Approver's District Approval

1. To edit the district approval information, from the Approver's Quick Links, click **District Approval.** The Court Staff District Selection screen appears with the location selections.

Approver's Quick Links:	Profile	District Approval	County Approval	Membership

2. Follow the steps in setting up an approver's district approval (start at step 2), located on Page 65.

To Update Approver's County Approval

1. To edit the county approval information, from the Approver's Quick Links, click **County Approval.** The Court Staff County Selection screen appears with the location selections.

Approver's Quick Links:	Profile	District Approval	County Approval	Membership

2. Follow the steps in setting up an approver's county approval (start at step 2), located on Page 66.

Invoices

Overview of Approving Invoices

About approving/denying

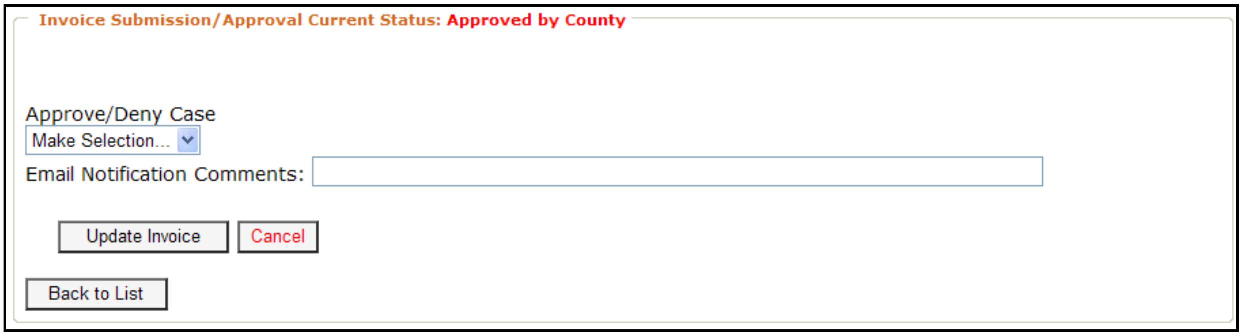
After the examiner submits the invoice, it is ready for review by the approver. It goes through two levels of approval: county level and district level. The approval is completed at the case level and not by the invoice level – that means that when an invoice is opened, each case within it must be separately reviewed and approved. After review, if the invoice needs further information and cannot be approved at the current time, the corresponding status option should be selected. If the invoice is acceptable, the approver can select approved. The status options are described below.

Status Option	Description
Approval Denied	Indicates that the invoice has inaccurate or missing information and

	has been denied by one of the approvers. It is returned to the examiner for additional information or corrections.
Approved	Indicates that the invoice is accurate and that you are approving the invoice. If you are the county-level approver, the district-level approver will be notified. If you are the district-level approver, the approval process is completed. The invoice will be ready to be entered into MAPS. This is the final step in the approval invoice process.

Approval status for the invoice

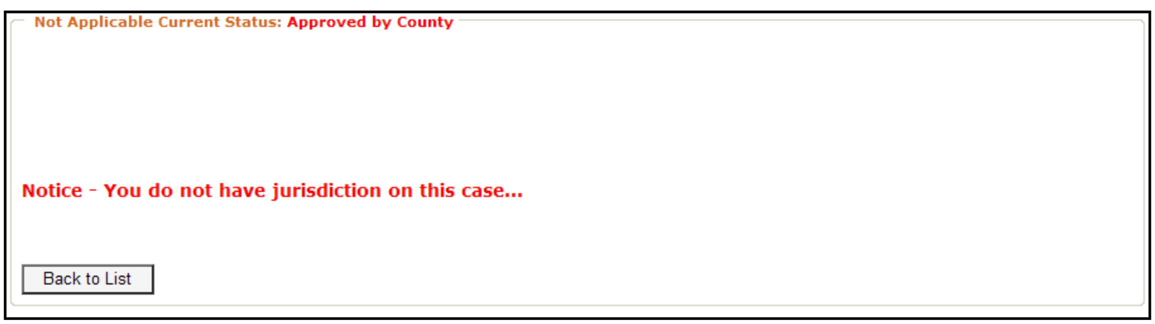
An approval status displays at the top of the approval section. For example, if the county approver has already approved the invoice, it will display "Approved by County".



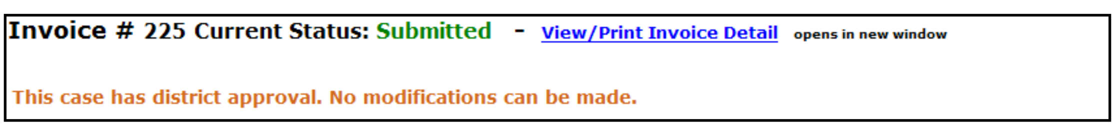
Cases within an invoice that are in your jurisdiction

An approver can view all pending invoices (covering all districts), but he/she cannot edit an invoice/case unless it is within his/her own jurisdiction. For cases in their jurisdiction, approvers have access to any/all invoice fields.

If you select a case in an invoice where you do not have jurisdiction, a message will display stating that you cannot edit the details and all the editing options will be grayed out.



Additionally, if you select a case that has already been approved by the district-level, a message will display stating that no modifications can be made at this time. All editing options will be grayed out.



Printing invoices

You may print an invoice at any time. In the header of the invoice on the Invoice Main Page screen, click the **View/Print Invoice Detail** hyperlink. The invoice opens in another browser window and you may view or print it.

Accessing an Invoice for Approval

To access an invoice for review, follow the instructions below. These instructions are for both county-level approvers and district-level approvers.

1. From the menu of options, select **Approver** >> **Pending Approvals**. The Approver Invoice List screen appears.

For the following location(s):

Invoices submitted for approval

	Invoice #	Examiner	Submission Date	Contract Number	Status
Select	154	Ballmer	1/11/2008	1234	Submitted
Select	222	WebExaminer	3/27/2008		Submitted
Select	225	PageBanas	4/21/2008		Submitted
Select	227	WebExaminer	4/21/2008	99998888	Submitted
Select	241	Summers	4/21/2008		Submitted
Select	261	Examiner	5/14/2008		Submitted
Select	215	PageBanas	3/25/2008	A-125-456	Approved by County

Notes:
- If there are not any invoices ready for approval, a "No Invoices" message will display.
- For additional information on what you see in the application in regard to invoices, refer to the Overview of Approving Invoices.

2. From the list of invoices, locate an invoice to review. On the left-hand side, click **Select**. The invoice appears.
Note: Use the scrollbar on the right-hand side to navigate through the entire invoice.

Invoice # 261 Current Status: Submitted - **View/Print Invoice Detail** **opens in new window**

Invoice Header

Examiner Name	Examiner
Submission Date	5/14/2008 8:54:25 AM
Contract Number	
Comments	

Examiner Info.

FullName	Examiner, Ashley
BusinessName	
Address	1234
	Examiner Lane
City	St. Paul
State	MN
Zip	55155
VendorCode	

Cases

	ID	Case Type	Location	Case Number	First Examiner	Rate	Rate Type	Alternate Rate	Alternate Rate Type	Alternate Rate Reason	Case Comments	Status
Select	306	(CD) Chemically Dependent	Anoka	345345345	☑	0.00		0.00				Submitted
Select	307	MI, CD, DD	Isanti	121212121212	☑	0.00		0.00				Submitted

Add/Update Cases

3. Review the entire invoice by each separate case in your jurisdiction. To begin, at the top of the invoice under Cases, on the left-hand side, click **Select** for the desired case.

> **Note:**
> If you are approving cases in an invoice that are under different jurisdictions, the status column (located on the far right) is useful for viewing the status of each case included in the invoice.

> **Important:**
> - Verify that you have reviewed all entries and that the figures are accurately reflecting all work done on the file (i.e., make sure that all services are properly entered and that the total hours reflect the work completed). If services are not identified for a case, a message will appear to indicate that error. Also verify that if an alternate rate was used, that it is accurate and true.
> - In efforts to clean up data and to speed up the process of submitted invoices, if you discover small but obvious mistakes, you are encouraged to fix them (e.g., if a telephone call is billed for "9" hours instead of ".9"). If you discover larger mistakes, you may work with the examiner to correct them as applicable (e.g., proper case style or hours at a location).

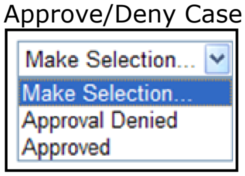
4. If this case is ready for approval, see Approving an Invoice, located below.
   OR
   If the invoice cannot be approved at this time, see Denying an Invoice, located below.

Approving an Invoice

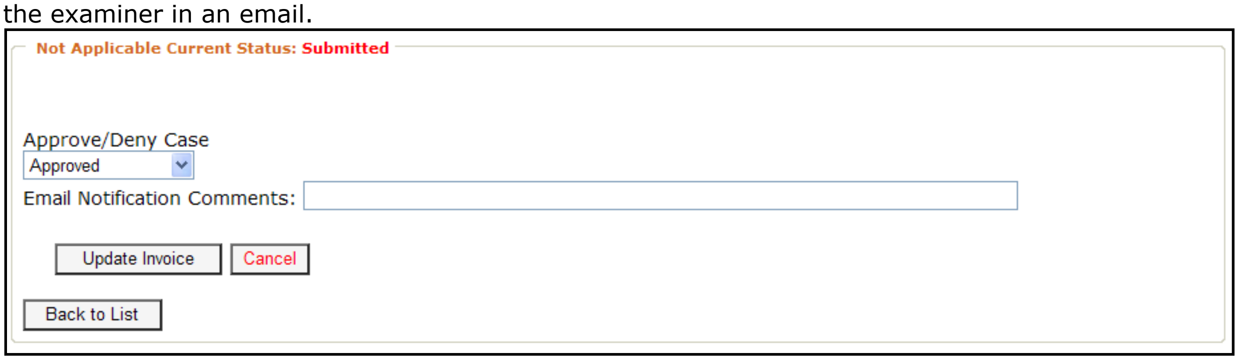
To approve an invoice, follow the instructions below. These instructions are for both county-level approvers and district-level approvers.

> **Important:**
> Pay particular attention to the case number for accuracy and review any mileage or extraordinary expenses.

1. If you approve of the case details, at the bottom of the invoice in the approval section, from the Approve/Deny Case drop-down menu, select **Approved**.



2. In the Email Notification Comments field, provide a comment if desired. This message will be sent to the examiner in an email.



3. Click **Update Invoice**. The case is approved and the invoice is updated with that information.

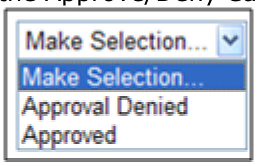
4. If another case is in your jurisdiction, to review and approve another case in the invoice, navigate to the top of the invoice and start at step 3 in Accessing an Invoice for Approval.

5. To exit, using the main toolbar, navigate to your desired location or to the next invoice waiting for your approval.

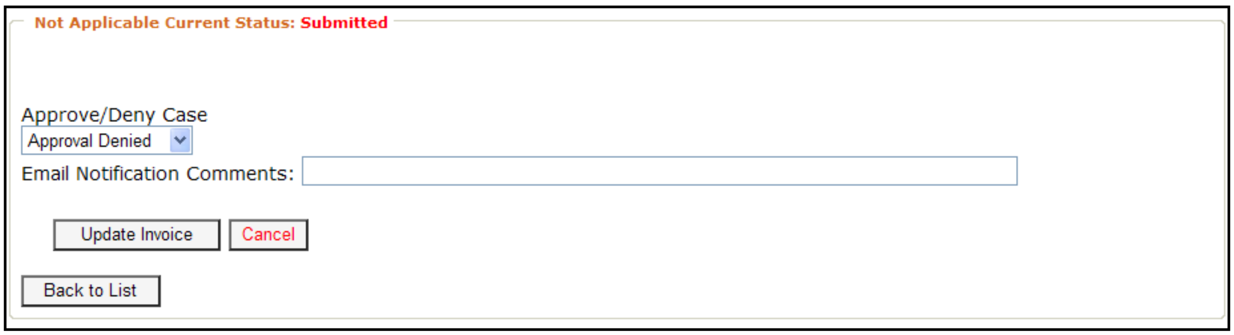
Denying an Invoice

To deny an invoice, follow the instructions below.

1. If the case cannot be approved at this time, at the bottom of the invoice, in the approval section, from the Approve/Deny Case drop-down menu, select **Approval Denied**.



2. In the Email Notification Comments field, provide a reason for the denial, if desired. This message will be sent to the examiner in an email.



3. Click **Update Invoice**. The case is approved and the invoice is updated with that information.

4. If another case is in your jurisdiction, to review and approve another case in the invoice, navigate to the top of the invoice and start at step 3 in Accessing an Invoice for Approval.

5. When completed, to exit, using the main toolbar navigate to your desired location.

Approver & Program Admin. Tools & Resources

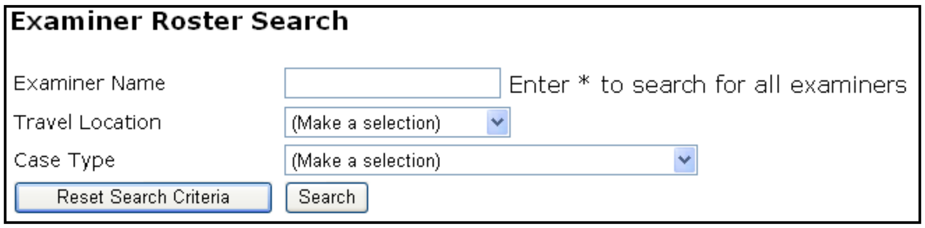
Searches

Searching for Examiner

There are two ways to search for an examiner: by name or by location and type. It is not recommended to complete all fields for a search. Please review the list below before searching.

Tips for searching:

- Search by last name **OR** by location and type
- Name field is **not** case sensitive.
- For better results, it is not recommended to complete all fields for a search.
- The wildcard (*) can be used alone to search for all examiners.
- You can search by the first initial of the last name (e.g., "s" for "Smith").



1. From the menu of options, select **Search** >> **Search for Examiner**. The Examiner Roster Search appears.
2. To perform a search, complete the desired fields:

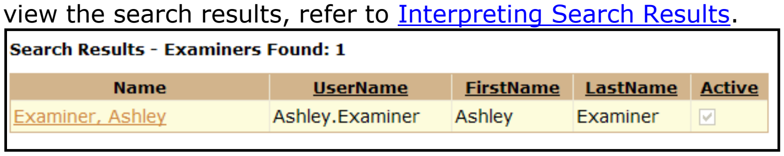
   To search by examiner name

   a. In the Examiner Name field, type the desired last name.
      Note: See the tips for searching, above.

   To search by travel location and case type

   a. In the Travel Location field, from the drop-down menu, select an available option.

   b. In the Case Type field, from the drop-down menu, select an available option.
3. Click **Search** or press **Enter**. Your search results appear below the Examiner Roster Search fields. To view the search results, refer to Interpreting Search Results.



Search Results - Examiners Found: 1

Name	UserName	FirstName	LastName	Active
Examiner, Ashley	Ashley.Examiner	Ashley	Examiner	☑

4. To search again, at the top of the page, type over the existing criteria or re-select an option, and repeat Step 2-3.
   OR
   To clear the search results and search criteria, click **Reset Search Criteria** and repeat Steps 2-3.

Interpreting Search Results

Searching by either of the two examiner search methods above will produce the same results.

Note: If your search results in a long list, to avoid extensive travel for an examiner select an examiner whose office location matches your requested travel location.

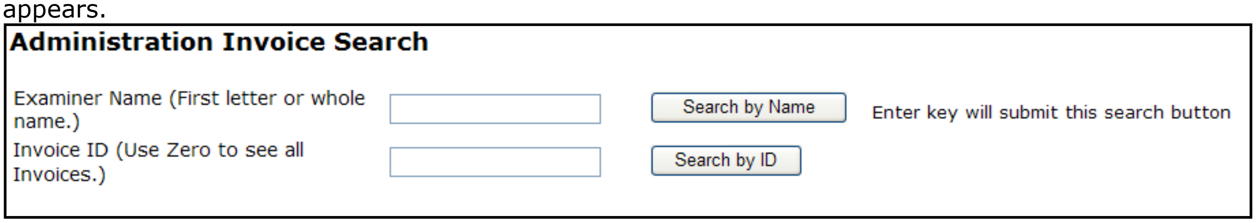
Column Name	Description
Name	Lists the examiner's name, by last and first name.
Travel Location	Lists the travel location of the examiner.
Office County	Lists the office county location of the examiner.
Case Type	Lists all types of cases that examiner treats/examines.

1. From the list of search results, locate to find the desired examiner.
2. To open the desired examiner's information, click on the hyperlinked name of the examiner. The examiner's profile and travel details appear.
3. To page forward or backward through the results, at the bottom of the search results, click the appropriate arrow.
   Note: Refer to the navigation tips under "Using Arrows", located on Page 6.
4. To navigate back to the examiner search screen, start at step 1 in Searching for Examiners.

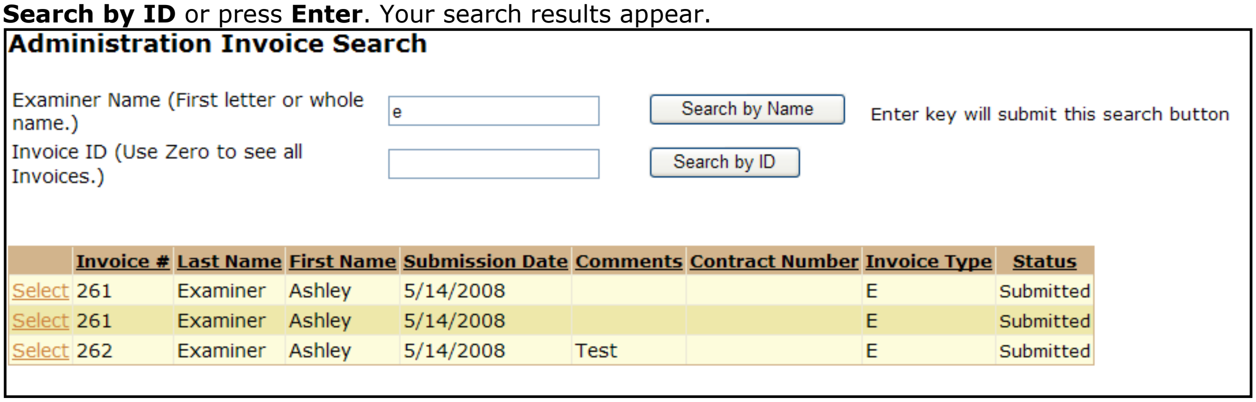
Searching for Invoices

If you need to check on the status of a particular invoice, follow the applicable steps below.

1. From the menu of options, select **Search** >> **Search for Invoice**. The Administration Invoice Search appears.



2. To perform a search by examiner name, in the Examiner Name field, type the requested information and click **Search by Name** or press **Enter**. Your search results appear.
   OR
   To perform a search by Invoice ID, in the Invoice ID field, type the requested information and click **Search by ID** or press **Enter**. Your search results appear.



Note:
For approvers, the search results are filtered by your own county. For program administrators, the search results list all invoices.

3. To the left of the desired search result, click **Select**. The invoice opens.
   OR
   Use the main toolbar to exit or navigate to your desired location.
4. See the steps in Accessing an Invoice for Approval.

Reports

Generating Reports

Program administrators and district administration are able to generate district-specific reports. This allows them to view the statistics for the individual districts. Approver may also have access to specific reports for their county/district.

1. From the menu of options, select **Reports**. The list of reports appears.

Data Quality

- Multi-Record Examiners
- Potential Data Problems Case
- Potential Data Problems Examiner

Operational

- Activity Fiscal Year Hours
- Address Label Export
- Examiner Activity For Period By County
- Program Performance by Case Type
- Examiner Extraordinary Expenses
- Person Detail
- Contract Summary
- Personnel List

Statistical

- Case Volume
- Examiner Hours By Employment Type
- Program Performance by Case Type
- Staffing Summary

Other

- Administrative Activity
- Case Type Snap-Shot
- Examiner Active Case
- Examiner Email Addresses
- Examiner MasterList
- Examiners With No Billing
- Invoice Detailed
- Mailing Labels
- Potential Data Problems

Report Name	**Description**
Data Quality	
Multi-Record Examiners	How many cases have more than one examiner assigned to them? What is the case type? Which county assigned the case?
Potential Data Problems Case	What are common errors that examiners make, that approvers don't catch, when completing invoices (where there are no system edits)?
Potential Data Problems Examiner	What are common errors that are created, when entering Examiner Profiles?
Operational	
Activity Fiscal Year Hours	What is the total number of hours billed for each type of examiner (i.e., contractor, employee and ad hoc) monthly? Provides total for each for a specific time period and a grand total of all.
Address Label Export	Not a report – a utility for exporting selected names and addresses to an Excel spreadsheet that can be used as the data source for automated mailing label preparation.
Examiner Activity For Period By County	Summary of examiners activity within a specific period of time. Shows examiners assignments per each county.
Examiner Extraordinary Expenses	Report providing extraordinary expenses billed by examiner, by county, by district.
Person Detail	Ability to print specific examiner profile page(s).
Contract Summary	Report of all Contract Examiners showing the number of hours and dollar amount available per contract; also showing the amount of hours that have already been billed, the percentage used, the contract dollars used, the contract dollars remaining, the case count of Cases Served or Cases Assigned or Cases Completed, and the average number of hours per case. Note: Each contract indicates a "fixed" dollar amount encumbered for each contractor.

Personnel List	Ability for court staff (i.e., approvers and court services staff) to print a roster with selected contact information from profile and contract.
Statistical	
Case Volume	Summarizes the caseload change over a specified period of time. Reports case totals and totals for each case type.
Examiner Hours By Employment Type	Report of total hours billed within a specific time period by employment type (i.e., employee, contractor, independent).
Program Performance By Case Type	Report of number of cases by case types that have been assigned to examiners.
Staffing Summary	Number of examiners by specific time period by Employment Type (Employee, Contractor, Independent).
Other	
Administrative Activity	Ability to track various activities of examiners (i.e., resumes, proof of liability, orientation attendance, etc.)
Case Type Snap-Shot	Report by case type, showing # of examiners, # of hours billed, and #'s of cases.
Examiner Active Case	Report by examiner showing # of active cases and # of cases billed by month and by fiscal year.
Examiner Email Addresses	List of email addresses for each examiner.
Examiner Master List	Master list of examiners, showing home county, start date, and phone numbers.
Examiners With No Billing	Provide a list of examiners that have not submitted invoices for a specific period of time.
Invoice Detail	A detailed description of submitted invoice.
Mailing Labels	Ability to generate mailing labels for examiners.
Potential Data Problems	Provides report of data entry problems on invoices that are missed by approvers.

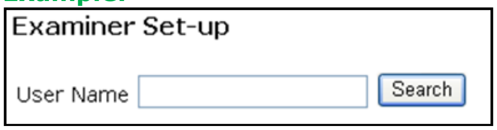
2. From the list of reports, click the hyperlink of the desired report title to open it. The report parameters and details for generating appear.
3. Complete the report fields and parameters, and generate. The report appears.

Program Admin. Tools & Resources

User Accounts/Profiles

Searching For a Username

Before creating a username and membership account for a new user – whether it is an examiner or an approver – search for the username to verify that it is not being used.

1. From the menu of options, select **Program Administrator** >> **Users/Membership** >> **Examiner** or **Approver**. The applicable Set-up screen appears.
   Example:
   

2. In the User Name field, type the username for the new Examiner or Approver. Use first name and last name.
   Example: Jane.Doe
   Note: If a username is already being used, try first name, middle initial, and last name (e.g., Jane.S.Doe)
3. Click **Search** or press **Enter**. A list of search results may appear.
4. If the username does not appear in the list, follow the steps in creating a membership account.
   OR
   If the username already appears in the list, check to see if it is for the same user. If it is and you have verified the user's data, they may already be in the system and you can proceed with updating their profile. See Editing Examiner Profile/Account or Editing Approver Profile/Account.
   OR
   If the username already appears in the list and it *is* being used by another user, repeat Steps 2-4 again and try a different variation of the username.

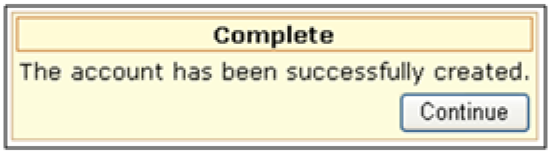
Creating a Membership Account

Only program administrators are able to create membership accounts for examiners, approvers, service desk personnel, or administration. If you are a program administrator, and you have followed the steps in searching for a username (see above), follow the steps below to create a membership account.

1. From the menu of options, select **Program Administrator** >> **Users/Membership** >> **Create Account**. The Create a Membership Account appears.
   

2. In the User Name field, type the new user's username. Use first name and last name.
   Example: Jane.Doe
   Note: If a username is already being used, use first name, middle initial, and last name (e.g., Jane.S.Doe)
3. In the Password field, type the new user's default password.
4. In the Confirm Password field, re-type the new user's default password.
5. In the E-mail field, type the new user's email address.
6. In the Security Question field, type the new user's assigned security question.
7. In the Security Answer field, type the new user's assigned security answer.
8. Click **Create User**. The Assign Roles screen appears.

9. Select a role and click **Next**. A successful completion screen appears.



10. Click **Continue**. You are returned to the home page.

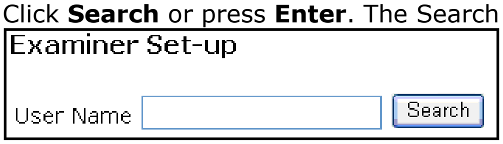
Setting up Examiner Profile/Account

After creating a membership account for an examiner, a profile will need to be created. Only program administrators are able to do the initial setup of the profile for an examiner, after that the examiner can complete the remainder of it. If you are a program administrator, follow the steps below.

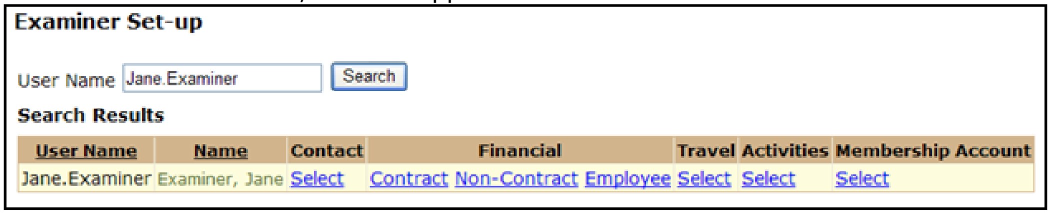
- Setting Up an Examiner
- Setting Up Profile Information
- Setting Up Financial Information
- Setting Up Travel Information
- Setting Up Activities Information
- Setting Up Membership Account

To Set Up an Examiner

1. From the menu of options, select **Program Administrator** >> **Users/Membership** >> **Examiner**. The Examiner Set-up appears.
2. In the User Name field, type the username of the examiner that you want set up.
3. Click **Search** or press **Enter**. The Search Results appear.



4. From the Search Results, find the applicable user.



Examiner Set-up

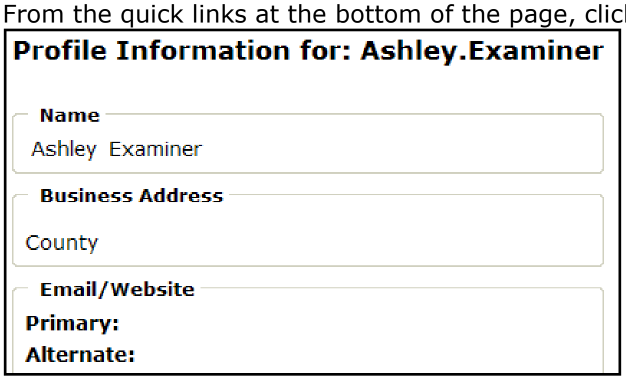
User Name Jane.Examiner Search

Search Results

User Name	Name	Contact	Financial			Travel	Activities	Membership Account
Jane.Examiner	Examiner, Jane	Select	Contract	Non-Contract	Employee	Select	Select	Select

To Set Up Profile Information (Examiner)

1. For the desired user, under the Contact column, click **Select**. The Profile Information appears.
   OR
   From the quick links at the bottom of the page, click **Profile**.



Profile Information for: Ashley.Examiner

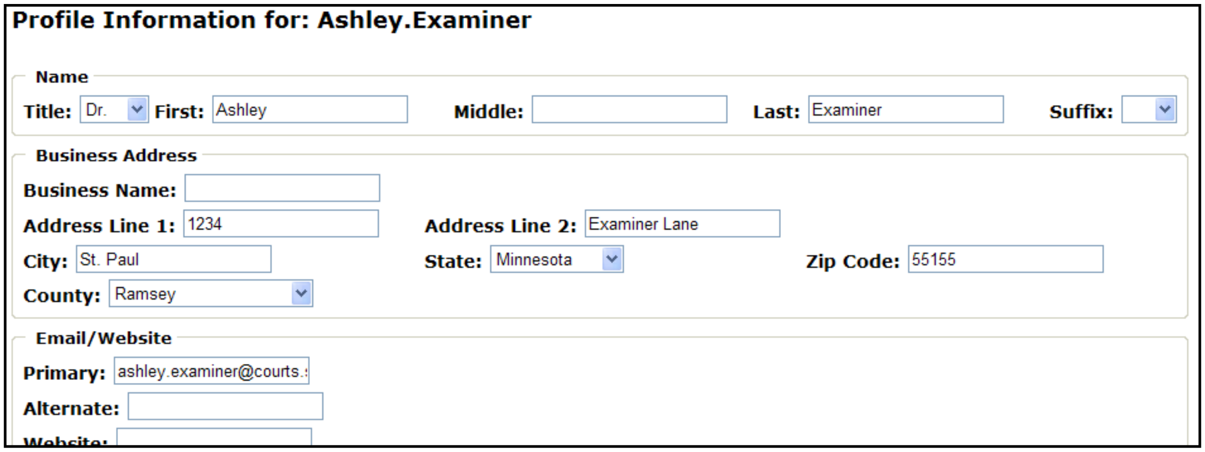
Name
Ashley Examiner

Business Address
County

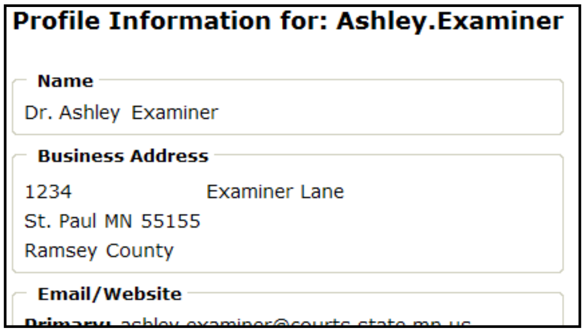
Email/Website
Primary:
Alternate:

2. At the bottom of the brief contact information, click **Edit**. The fields open for editing.
3. Complete the applicable fields.

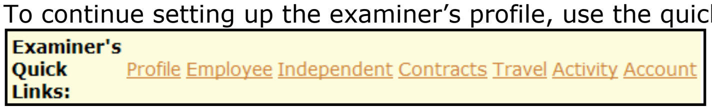
Section	Fields/Description
Name	Where applicable, provide the requested information by selecting from the drop-down menu. Otherwise, type in the field(s) using proper case (e.g., John Smith).
Business Address	Where applicable, provide the requested information by selecting from the drop-down menu. Otherwise, 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 the payment voucher.
Credentials	• In the Highest Degree Earned field, from the drop-down menu, select an option. • In the License Number field, type the examiner's license number.
System	This section is for administrative use only.



4. At the bottom of the screen, to save click **Update**. The profile information is saved.



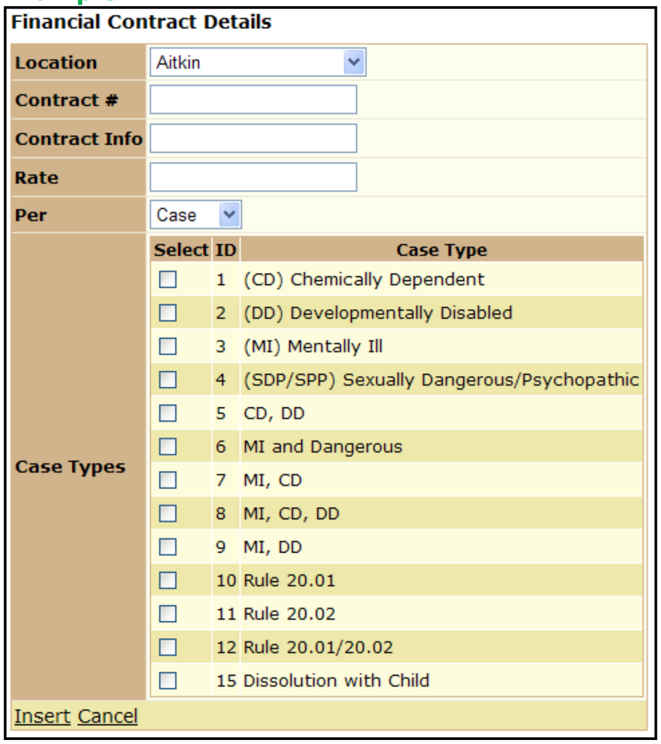
5. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up the examiner's profile, use the quick links at the bottom of the page.



To Set Up Financial Information (Examiner)

1. For the desired user, under the Financial column, click the desired selection: **Contract**, **Non-Contract**, or **Employee**. The selected Examiner Financials and a new Financial Details page appears.
   OR
   To use the Examiner's Quick Links, click **Employee**, **Independent**, or **Contracts**.

Example:



Financial Contract Details

Location	Aitkin
Contract #	
Contract Info	
Rate	
Per	Case

Case Types

Select	ID	Case Type
☐	1	(CD) Chemically Dependent
☐	2	(DD) Developmentally Disabled
☐	3	(MI) Mentally Ill
☐	4	(SDP/SPP) Sexually Dangerous/Psychopathic
☐	5	CD, DD
☐	6	MI and Dangerous
☐	7	MI, CD
☐	8	MI, CD, DD
☐	9	MI, DD
☐	10	Rule 20.01
☐	11	Rule 20.02
☐	12	Rule 20.01/20.02
☐	15	Dissolution with Child

Insert Cancel

2. Complete the applicable fields for the financial type that you selected.

Financial Type	Fields/Description
Contract	• **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 use a dollar symbol. • **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 cases.
Independent	• **Rate:** This is a required field. Provide the appropriate rate. It is recommended to provide numbers with decimals (e.g., 250.00); do not use a dollar symbol. • **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 cases.
Employee	• **Location:** From the drop-down menu, select an option. • **Case Types:** From the checkboxes, select the applicable cases.

3. To save your changes, click **Insert**. The new financial information is added and you are returned to the Examiner Financials.

Example:

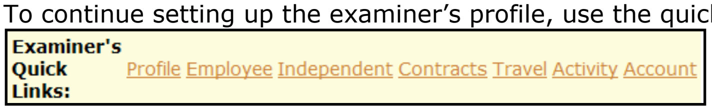
Examiner Financials - Contract

	Location	Contract #	Contract Info	Rate	Per
Select	Aitkin	55555		100.00	Case

Financial Contract Details

4. To add another financial entry, on the left-hand side of the desired entry, click **Select**. The Examiner Financials appear.
    a. Click **New**. Repeat Steps 2-3.

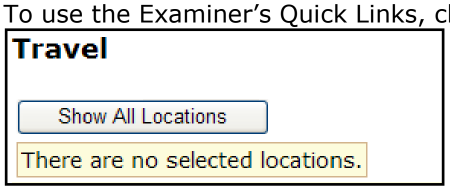
    OR
    To select/edit the newly added financial details, on the left-hand side of the desired entry, click **Select**. Follow the steps in To Update Financial Information, located on Page 59.
    OR
    If completed, use the main toolbar to exit or navigate to your desired location.
    OR
    To continue setting up the examiner's profile, use the quick links at the bottom of the page.



To Set Up Travel Information (Examiner)

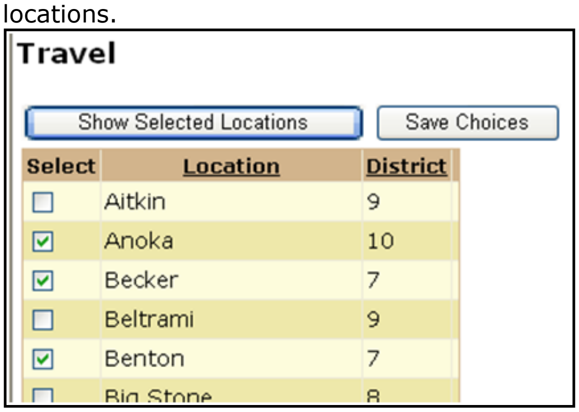
Note:
The courts will be able to search for examiners based on the travel locations indicated in their profile.

1. For the desired user, under the Travel column, click **Select**. The Travel page appears.
    OR
    To use the Examiner's Quick Links, click **Travel**.



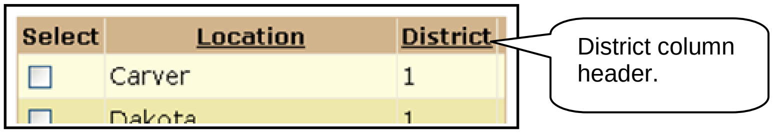
Note:
A map of all the counties and districts in Minnesota is provided. From the Examiner Travel screen, click the **MN Map** hyperlink located above the main menu. It opens in its own web browser window.

2. To select some locations, click **Show All Locations**. The entire list of locations opens.
3. From the list of locations, on the left-hand side, use the checkboxes to indicate the examiner's locations.

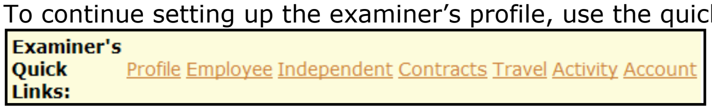


    a. To sort the locations by district, click once on the **District** column header. The list of locations is now sorted by district.

Note: Now you have the ability to select the counties in a specific district.

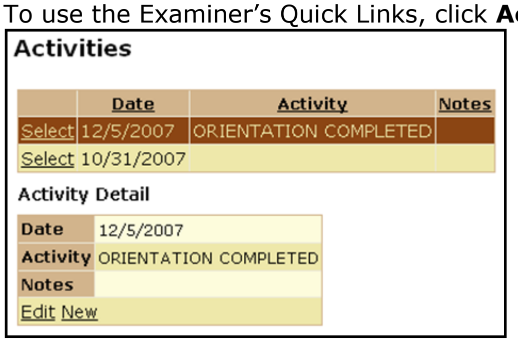


4. When your selections are complete, click **Save Choices**.
5. To review your selections only, click **Show Selected Locations**.
6. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up the examiner's profile, use the quick links at the bottom of the page.

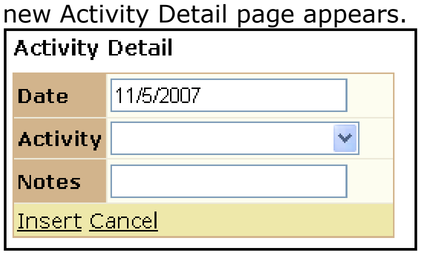


To Set Up Activities Information (Examiner)

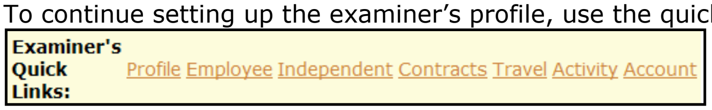
1. For the desired user, under the Activities column, click **Select**. The Activities information appears. If there are no activities listed, skip to step 3.
   OR
   To use the Examiner's Quick Links, click **Activities**.



2. If activity information appears, to add another activity, at the bottom of the information, click **New**. A new Activity Detail page appears.



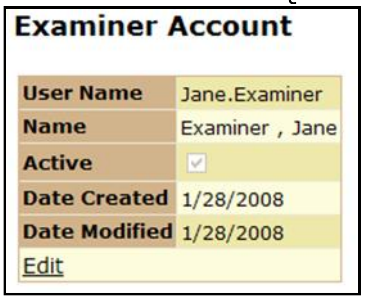
3. Complete the applicable fields.
4. To save, click **Insert**. The new activity is added to the Activities list.
5. Repeat Steps 2-4 until all activities are added.
6. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up the examiner's profile, use the quick links at the bottom of the page.



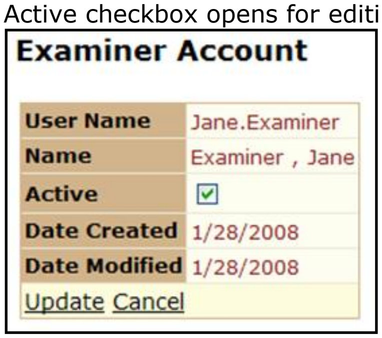
To Set Up Membership Account (Examiner)

The examiner's account is automatically set as active. **If you do not need to change any of the information in the account area, skip this section of instructions.**

1. For the desired user, under the Membership Account column, click **Select**. The Examiner Account information appears.
   OR
   To use the Examiner's Quick Links, click **Account**.

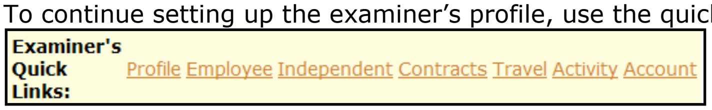


2. If you need to make this user inactive, at the bottom of the information, click **Edit**. The necessary Active checkbox opens for editing.



3. Deselect the checkbox for **Active**. To save, click **Update**. The examiner's profile is updated and you are returned to the Examiner Account.
   Note: If you make the examiner's profile inactive, they will not be found when a search is performed.

4. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up the examiner's profile, use the quick links at the bottom of the page.



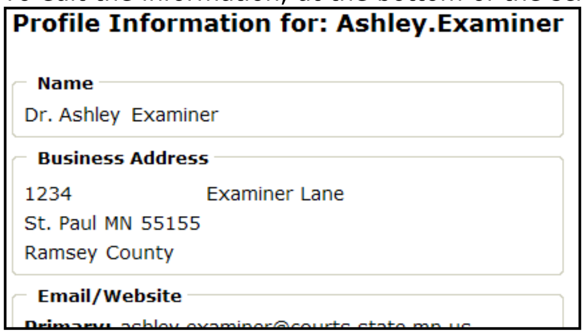
Editing Examiner Profile/Account

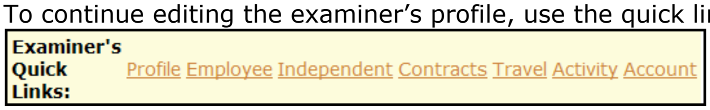
After creating a membership account for an examiner and setting up a profile, you may need to update the information. The examiner is given the rights to update his/her own information, except for the activities and membership account information. If you are a program administrator, follow the steps below as needed.

- Profile Information
  - Updating Profile Information
- Financial Information
  - Updating Financial Information
  - Deleting Financial Information
- Travel Information
  - Updating Travel Information
- Activities Information
  - Updating Activities Information
- Membership Account
  - Updating Membership Information

Profile Information (Examiner)

To Update Profile Information

1. For the desired user, under the Contact column, click **Select**. The Profile Information screen appears.
   OR
   To use the Examiner's Quick Links, click **Profile**.
2. To edit the information, at the bottom of the screen, click **Edit**.
   

3. Complete the applicable fields. See the table (located in To Setup Contact Information) for completing the fields.
4. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue editing the examiner's profile, use the quick links at the bottom of the page.
   

Financial Information (Examiner)

To Update Financial Information

1. For the desired user, under the Financial column, click one of the options: **Contract**, **Non-Contract**, or **Employee**. The Examiner Financials and the first or only listed Financial Details appear.
   OR
   To use the Examiner's Quick Links, click **Employee**, **Independent**, or **Contracts**.
   a. If you have more than one financial entry listed, on the left-hand side of the desired selection, click **Select**. The selected Financial Details appears below.

Example:

Examiner Financials - Contract

	Location	Contract #	Contract Info	Rate	Per
Select	Anoka	456456489	DanaTestContract	500.00	Hour

Financial Contract Details

Location	Anoka
Contract #	456456489
Contract Info	DanaTestContract
Rate	500.00
Per	Hour
Case Types	(CD) Chemically Dependent (DD) Developmentally Disabled (MI) Mentally Ill (SDP/SPP) Sexually Dangerous/Psychopathic CD, DD MI and Dangerous MI, CD MI, CD, DD MI, DD
Edit Delete New	

2. To edit information, click **Edit.** The selected Financial Details page opens for editing.

Example:

Financial Contract Details

Location	Anoka
Contract #	456456489
Contract Info	DanaTestContract
Rate	500.00
Per	Hour

Case Types

Select	ID	Case Type
☑	1	(CD) Chemically Dependent
☑	2	(DD) Developmentally Disabled
☑	3	(MI) Mentally Ill
☑	4	(SDP/SPP) Sexually Dangerous/Psychopathic
☑	5	CD, DD
☑	6	MI and Dangerous
☑	7	MI, CD
☑	8	MI, CD, DD
☑	9	MI, DD
☐	10	Rule 20.01
☐	11	Rule 20.02
☐	12	Rule 20.01/20.02
☐	13	asdfasdfasdf

Update Cancel

3. Complete the applicable fields. See the table (located in To Setup Financial Information) for completing the fields.

4. To save your changes, click **Update**. The editing view closes and you are returned to the Examiner Financials and the first or only listed Financial Details.

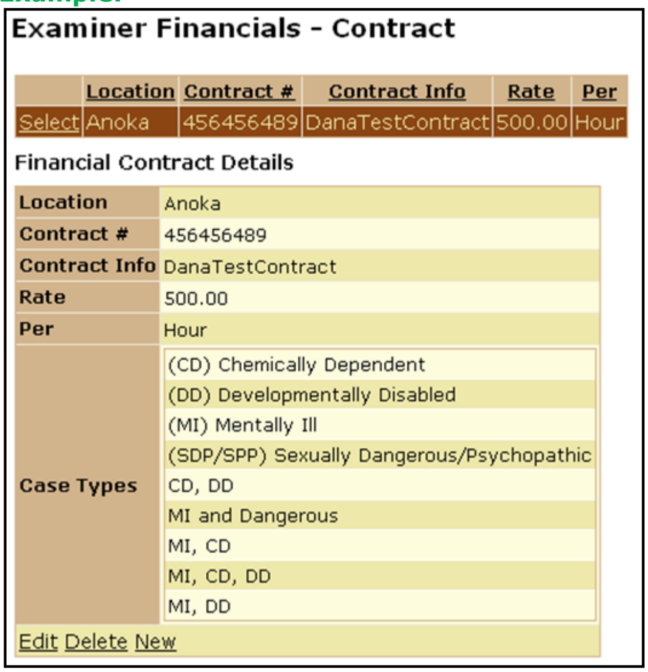
5. When completed, use the main toolbar to exit or navigate to your desired location.
OR
To continue editing the examiner's profile, use the quick links at the bottom of the page.

Examiner's Quick Links:	Profile Employee Independent Contracts Travel Activity Account

To Delete Financial Information

1. For the desired user, under the Financial column, click one of the options: **Contract**, **Non-Contract**, or **Employee**. The Examiner Financials and the first or only listed Financial Details appear.
   OR
   To use the Examiner's Quick Links, click **Employee**, **Independent**, or **Contracts**.
   a. If you have more than one listed, on the left-hand side of the desired selection, click **Select**. The selected Financial Details appear below.

Example:



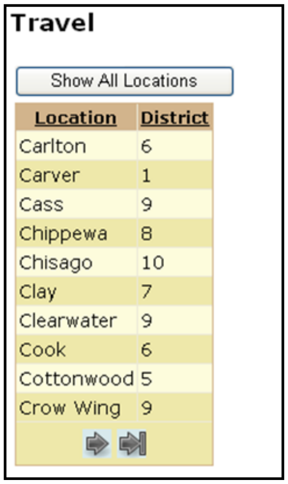
2. To delete the selected information, click **Delete.** The financial is deleted and you are returned back to the Examiner Financials and the first or only listed Financial Details.

Travel Information (Examiner)

To Update Travel Information

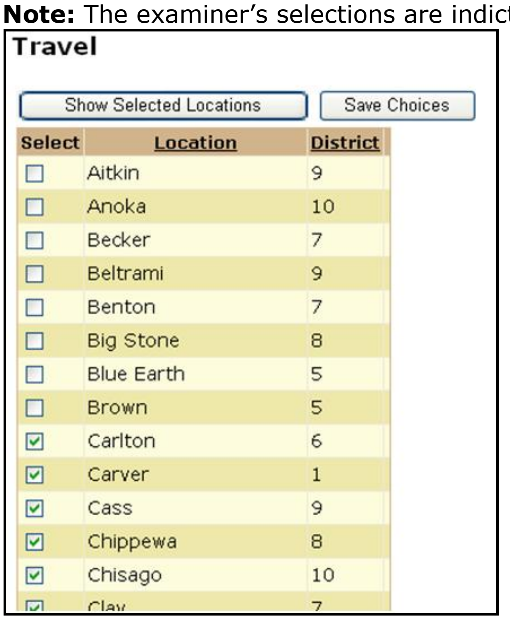
1. For the desired user, under the Travel column, click **Select**. The Travel screen appears showing the Examiner's travel location selections.
   OR
   To use the Examiner's Quick Links, click **Travel**.

> **Note:**
> A map of all the counties and districts in Minnesota is provided. From the Examiner Travel screen, click the **MN Map** hyperlink located above the main menu. It opens in its own web browser window.

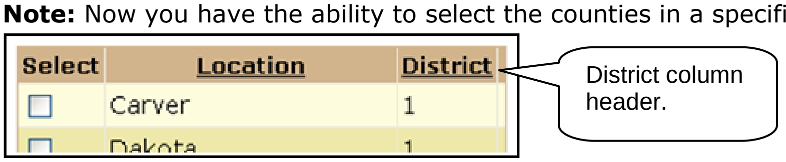


a. If there is more than one page of travel locations, click the arrows to navigate through the pages.

2. To edit or add locations to your selections, click **Show All Locations**. The entire list of locations opens.
Note: The examiner's selections are indicted by a checkmark next to the location.



a. To sort the locations by district, click once on the **District** column header. The list of locations is now sorted by district.
Note: Now you have the ability to select the counties in a specific district.



3. To select or deselect a location, on the left-hand side, click within the desired checkbox.

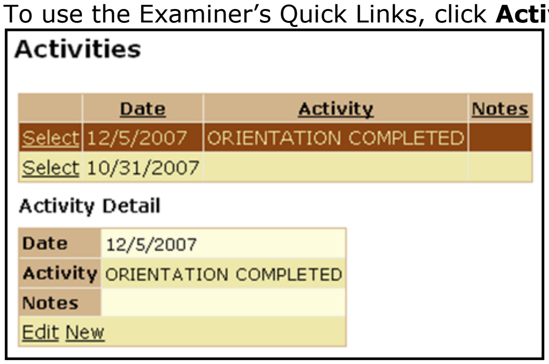
4. When your selections are complete, click **Save Choices**.

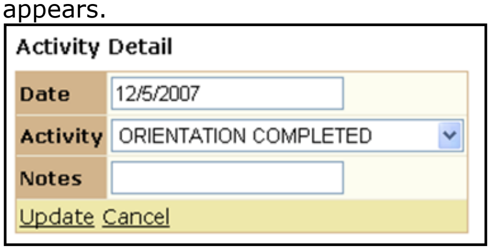
5. To review your selections only, click **Show Selected Locations**.

5. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue editing the examiner's profile, use the quick links at the bottom of the page.
   

Activities Information (Examiner)

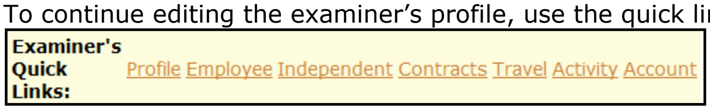
To Update Activities Information

1. For the desired user, under the Activities column, click **Select**. The Activities information appears.
   OR
   To use the Examiner's Quick Links, click **Activities**.
   

2. To update an activity, at the bottom of the information, click **Edit**. The editable Activity Detail page appears.
   

3. Complete the applicable fields.

Field	Action
Date	Provide the date of the activity. The recommended date format is: mm/dd/yyyy.
Activity	From the drop-down menu, select an option.
Notes	Provide any notes that would help describe the activity.

4. To save, click **Update**. The updated activity is revised on the Activities list.
5. Repeat Steps 2-4 as needed.
6. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue editing the examiner's profile, use the quick links at the bottom of the page.
   

Membership Account (Examiner)

To Update Membership Account Information

1. To update the membership account information, follow the steps in setting up a membership account, located on Page 58.

Setting up Approver Profile/Account

After creating a Membership Account for an approver, a profile will need to be created. Only program administrators are able to set up a profile for an approver. If you are a program administrator, follow the steps below.

- Setting Up Staff
- Setting Up an Approver's Profile
- Setting Up an Approver's District Approval
- Setting Up an Approver's County Approval

To Set Up Staff (Approver)

1. From the menu of options, select **Program Administrator** >> **Users/Membership** >> **Approver**. The Staff Set-up appears.
2. In the User Name field, type the username of the staff member that you want set up.
3. Click **Search** or press **Enter**. The Search Results appear.

   Staff Set-up

   User Name [ ] Search

4. From the Search Results, find the applicable user.

   Staff Set-up

   User Name June.Bugg Search

   Search Results

UserName	Name	Profile	District Approval	County Approval	Membership Account
June.Bugg	Bugg, June	Select	Select	Select	Select

To Set Up an Approver's Profile

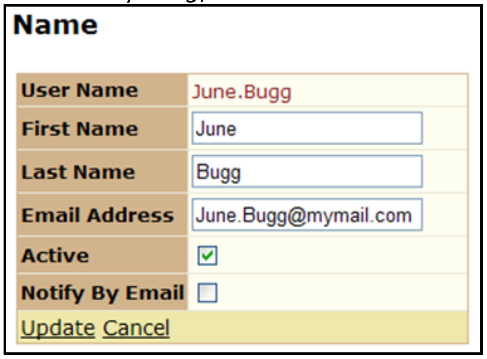
The approver's profile is automatically set as active. If you do not need to change any of the information in this area, skip this section of instructions.

1. For the desired user, under the Profile column, click **Select**. The Name information appears.

   Name

User Name	June.Bugg
First Name	June
Last Name	Bugg
Email Address	June.Bugg@mymail.com
Active	☑
Notify By Email	☐
Edit	

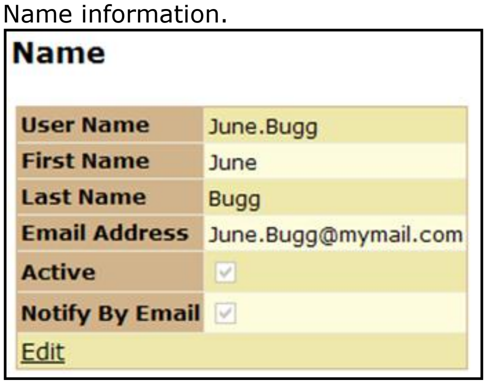
2. To edit anything, at the bottom of the information, click **Edit**. The necessary fields open for editing.



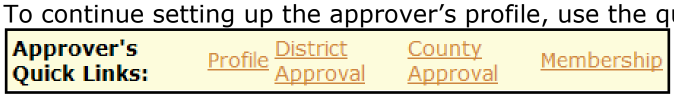
3. Complete/edit the applicable fields.

Field	Action
First Name	Type the first name of the approver using proper case (e.g., John).
Last Name	Type the last name of the approver using proper case (e.g., Smith).
Email Address	Type the email address of the approver.
Active	If necessary, deselect this checkbox to deactivate the user's profile.
Notify By Email	Select this checkbox to notify this approver by email for any correspondence needs.

4. When completed, to save click **Update**. The examiner's profile is updated and you are returned to the Name information.



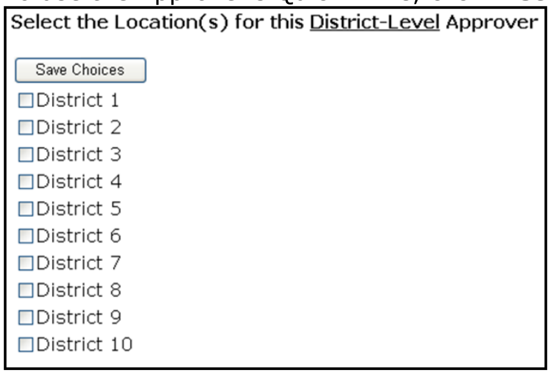
5. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up the approver's profile, use the quick links at the bottom of the page.



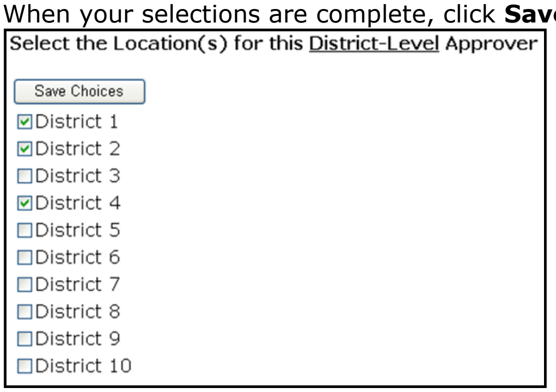
To Set Up an Approver's District Approval

1. For the desired user, under the District Approval column, click **Select**. The District Approval information appears.
   OR

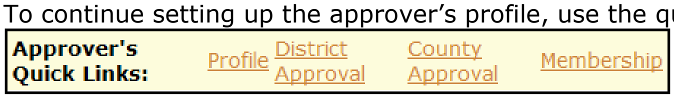
To use the Approver's Quick Links, click **District Approval**.



2. From the list of locations, on the left-hand side, use the checkboxes to indicate the approver's district-level locations.
3. When your selections are complete, click **Save Choices**.

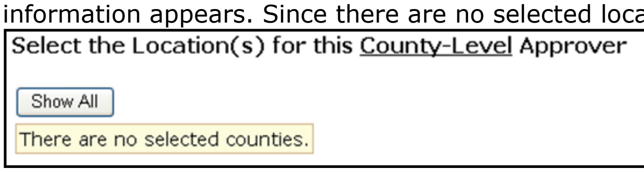


4. Use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up the approver's profile, use the quick links at the bottom of the page.



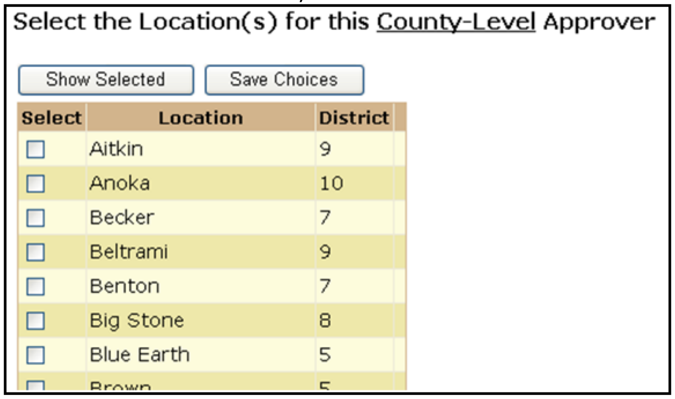
To Set Up an Approver's County Approval

1. For the desired user, under the County Approval column, click **Select**. The County Approval information appears. Since there are no selected locations, the following message appears.



OR
To use the Approver's Quick Links, click **County Approval**.

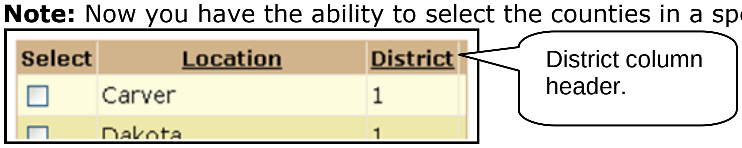
2. To select some locations, click **Show All Locations**. The entire list of locations opens.


Select the Location(s) for this County-Level Approver

Show Selected | Save Choices

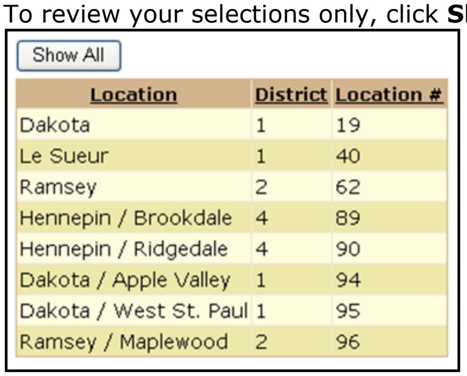
Select	Location	District
☐	Aitkin	9
☐	Anoka	10
☐	Becker	7
☐	Beltrami	9
☐	Benton	7
☐	Big Stone	8
☐	Blue Earth	5
☐	Brown	5

   a. To sort the locations by district, click once on the **District** column header. The list of locations is now sorted by district.
   Note: Now you have the ability to select the counties in a specific district.



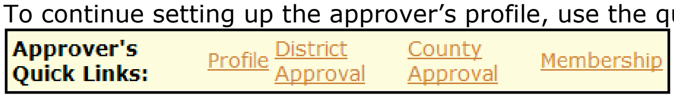
Select	Location	District
☐	Carver	1
☐	Dakota	1

3. From the list of locations, on the left-hand side, use the checkboxes to indicate the approver's county-level locations.
4. When your selections are complete, click **Save Choices**.
5. To review your selections only, click **Show Selected Locations**.


Show All

Location	District	Location #
Dakota	1	19
Le Sueur	1	40
Ramsey	2	62
Hennepin / Brookdale	4	89
Hennepin / Ridgedale	4	90
Dakota / Apple Valley	1	94
Dakota / West St. Paul	1	95
Ramsey / Maplewood	2	96

6. When completed, use the main toolbar to exit or navigate to your desired location.
   OR
   To continue setting up the approver's profile, use the quick links at the bottom of the page.



Editing Approver Profile/Account

After creating a membership account for an approver and setting up a profile, you may need to update the information. If you are a program administrator, follow the steps below as needed.

- Updating a Profile
- Updating District Approval
- Updating County Approval

To Update an Approver's Profile

1. To edit the profile, follow the steps in setting up a profile, located on Page 64.

To Update an Approver's District Approval

1. To edit the district approval information, follow the steps in setting up district approval, located on Page 65.

To Update an Approver's County Approval

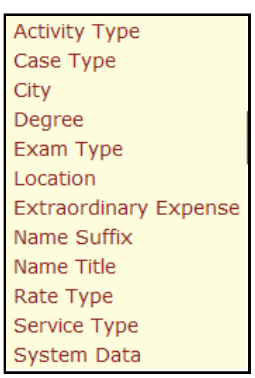
1. To edit the county approval information, follow the steps in setting up county approval, located on Page 66.

Code Tables

Maintaining Code Tables

The data in the code tables can be edited by the program administrator. If new codes need to be added, the program administrator can add them as well. Follow the applicable steps below.

Code Table	**Description**
Activity Type	Indicates the activity types that are made available in the drop-down menu for examiners to select and for which to bill.
Case Type	Indicates the types of cases that are used within Psychological Services and that are made available in the drop-down menu.
City	Indicates the cities where examiner offices are located and that are made available in the drop-down menu.
Degree	Indicates the educational degrees that are made available in the drop-down menu for the examiners, such as Ph.D and M.D.
Exam Type	Indicates the exam type options that are made available in the drop-down menu, such as 0.12 or Jarvis. See the table of all exam types in step four of Entering an Invoice.
Location	Indicates the locations that are made available in the drop-down menus, such as district numbers, counties, and MAPS Code numbers.
Extraordinary Charge Type	Indicates the extraordinary charge types that are made available in the drop-down menu, such as for photocopies or office supplies.
Name Suffix	Indicates the name suffix options that are made available in the drop-down menu, such as III and Jr.
Name Title	Indicates the name title options that are made available in the drop-down menu, such as Ms. and Dr.
Rate Type	Indicates the rate type options that are made available in the drop-down menu, such as per case or per week.
Service Type	Indicates the service type options that are made available in the drop-down menu, such as Testimony in Court or Interviewing.
System Data	Indicates system data options that are made available in the drop-down menu, such as allowances.



To edit existing code entries

1. From the menu of options, select **Program Administrator** >> **Maintain Code Tables** >> **[select desired code table option]**. The desired code table appears.
   Note: In the examples in this section, we have used the Case Type code table.

   Case Types

	Case Type Description
Select	(CD) Chemically Dependent
Select	(DD) Developmentally Disabled
Select	(MI) Mentally Ill
Select	(SDP/SPP) Sexually Dangerous/Psychopathic
Select	CD, DD
Select	MI and Dangerous
Select	MI, CD
Select	MI, CD, DD
Select	MI, DD
Select	Rule 20.01

   Important
   If more than 10 Case Types exist, then they will be listed on more than one page. Use the arrows at the bottom of the list to navigate forward. For more information on using the arrows, refer to the Navigation Tips under "Using Arrows", located on Page 6.

2. To edit one of the listed code tables, to the left of the code, click the **Select** hyperlink. The selected code table appears in a separate Detail table under the code table.

	Case Type Description
Select	(CD) Chemically Dependent
Select	(DD) Developmentally Disabled
Select	(MI) Mentally Ill
Select	(SDP/SPP) Sexually Dangerous/Psychopathic
Select	CD, DD
Select	MI and Dangerous
Select	MI, CD
Select	MI, CD, DD
Select	MI, DD
Select	Rule 20.01

   Case Type Detail

Case Type Description	CD, DD
Edit New	

3. At the bottom, in the Detail code table, to edit, click the **Edit** hyperlink. The Description field opens to editing.
   Note: On other code tables, there may be more than one field available for editing (e.g., System Data code table).
4. Make any changes as needed.
5. When completed, to save click the **Update** hyperlink. The code is updated.
   OR
   To exit out of the update area without saving any changes, click the **Cancel** hyperlink.
6. Repeat Steps 1-5 until all needed code table updates are completed.

To add a code to an existing code table

1. From the menu of options, select **Program Administrator** >> **Maintain Code Tables** >> **[select desired code table option]**. The desired code table appears.
   Note: In the examples in this section, we have used the Case Type code table.

   Case Types

	Case Type Description
Select	(CD) Chemically Dependent
Select	(DD) Developmentally Disabled
Select	(MI) Mentally Ill
Select	(SDP/SPP) Sexually Dangerous/Psychopathic
Select	CD, DD
Select	MI and Dangerous
Select	MI, CD
Select	MI, CD, DD
Select	MI, DD
Select	Rule 20.01

   Important
   If more than 10 Case Types exist, then they will be listed on more than one page. Use the arrows at the bottom of the list to navigate forward. For more information on using the arrows, refer to the Navigation Tips under "Using Arrows", located on Page 6.

2. To edit one of the listed code tables, click the **Select** hyperlink. The selected code table appears in a separate Detail table under the code table.

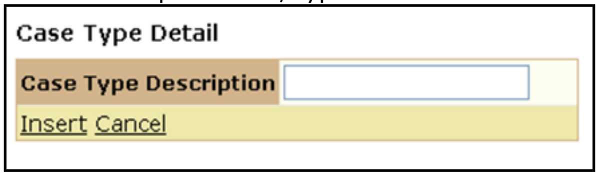
	Case Type Description
Select	(CD) Chemically Dependent
Select	(DD) Developmentally Disabled
Select	(MI) Mentally Ill
Select	(SDP/SPP) Sexually Dangerous/Psychopathic
Select	CD, DD
Select	MI and Dangerous
Select	MI, CD
Select	MI, CD, DD
Select	MI, DD
Select	Rule 20.01

   Case Type Detail

Case Type Description	CD, DD
Edit New	

3. At the bottom in the Detail code table, to edit, click the **New** hyperlink. A new code Description field opens.
   Note: On other code tables, there may be more than one field available for completing (e.g., System Data code table).

4. In the Description field, type the new code information.



5. When completed, to save click the **Insert** hyperlink. The new code is added.
   OR
   To exit out of the new area without saving any changes, click the **Cancel** hyperlink.
6. Repeat Steps 1-5 until all code table additions are completed.

Service Desk Tools & Resources

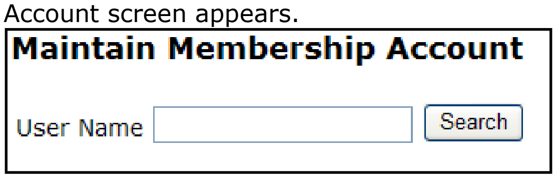
User Accounts

Maintaining Accounts

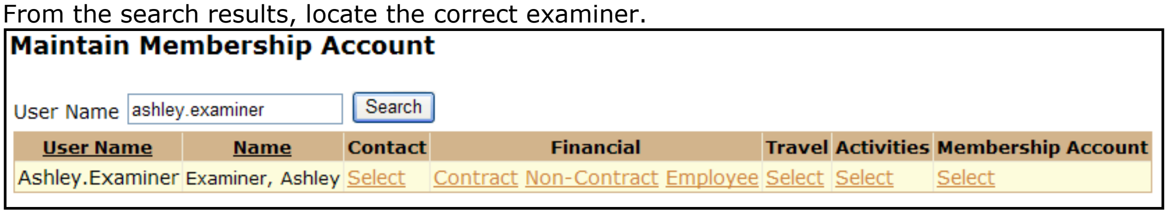
When a request is received for assistance, level 1 service desk personnel can make most changes to an examiner's account and are able to view invoices. If more complicated changes are required, the ticket can be forwarded to the program administrator.

> **Note:**
> Level 1 support cannot update or approve invoices. And they are not able to make accounts active if they are inactive. This can only be done by the program administrator.

1. From the menu of options, select **Service Desk** >> **Maintain Accounts**. The Maintain Membership Account screen appears.



2. To search for the examiner, type in the examiner's username (e.g., "ashley.examiner").
3. From the search results, locate the correct examiner.



4. Perform actions to the examiner's record as needed.

Question/Issue	**Action**	
Profile (Contact Information)	1. In the Contact column, click **Select**. 2. Refer to editing an examiner's profile information and complete steps 2-4. 3. Use the main toolbar to navigate to your desired location.	
Financial	Contract	1. In the Financial column, click **Contract**. 2. Refer to editing an examiner's contract information and complete steps 3-4. 3. Use the main toolbar to navigate to your desired location.
	Non-Contract (Independent)	1. In the Financial column, click **Non-Contract**. 2. Refer to editing an examiner's independent information and

		complete the desired steps for editing, deleting, or adding. 3. Use the main toolbar to navigate to your desired location.
	Employee	1. In the Financial column, click **Employee**. 2. Refer to editing an examiner's employee information and complete the desired steps for editing, deleting, or adding. 3. Use the main toolbar to navigate to your desired location.
Travel	1. In the Travel column, click **Select**. 2. Refer to editing an examiner's travel information and complete steps 2-5. 3. Use the main toolbar to navigate to your desired location.	
Activities	1. In the Activities column, click **Select**. 2. Refer to editing an examiner's activities information and complete steps 3-5. 3. Use the main toolbar to navigate to your desired location.	
Membership Account	1. In the Membership Account column, click **Select**. 2. Refer to editing an examiner's membership account information and complete steps 2-3. 3. Use the main toolbar to navigate to your desired location.	

5. When completed, use the main toolbar to navigate to your desired location.