

CUSTOMER CASE STUDY

SUPPORT BROKER OPTIMIZES BUDGET CREATION, MANAGEMENT, AND VISIBILITY WITH eVero

BACKGROUND

After working for and with numerous I/DD agencies, Donna Febo became an independent Support Broker in 2015, during the early days of Self-Direction in New York. She initially became involved to personally support the needs of her two children, and from there, her business, My Applied Personal Supports (MAPS-LI), has steadily grown. Donna now supports almost 70 Individuals in total across three different Fiscal Intermediaries.

CHALLENGE

When Self-Direction was first introduced by OPWDD, the processes used by many I/DD agencies were disjointed and highly manual. Budgets were created by Brokers by hand, sent via e-mail or fax to the Fiscal Intermediary (FI), who manually reviewed and then mailed them to the state for approval. There was limited tracking of budget expenditures and changes, and FIs, Brokers, and Families struggled to monitor budget dollars spent and remaining. Plans and meeting notes were often kept in separate systems, and were not easy to share with other members of the care team. Hard copy receipts and invoices were gathered by families and sent at month-end to the FIs and Brokers for processing, delaying reimbursement. Staff time and mileage were tracked on paper and manually input into accounting systems like QuickBooks, which was both time-consuming and prone to human error.

These manual processes and siloed systems made it challenging for a Broker to stay on top of budget usage, paperwork requirements, and invoicing for all the Individuals they support, especially across multiple FIs.

"I live in digitalAGENCY for most of my day and I can tell you that the system is functional and fabulous, and the eVero team is fantastic!"

Donna Febo | My Applied Personal Supports

BEFORE

- Manual budget creation, approval and tracking
- Documentation maintained in separate, siloed systems
- Slow reimbursement cycle
- Limited collaboration between care team members

AFTER

- EMPOWER seamlessly connects team members and families
- Automated processes simplify data and document collection, verification and sharing
- Online tools streamline budget, plan and meeting note creation and management
- Robust reporting offers real-time budget and invoice tracking



SOLUTION

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Donna first encountered eVero's EMPOWER™ software when one of the FI's that she works with started using it. She immediately saw the benefit in the platform's collaborative design which allowed the entire care team – Brokers, FIs, Staff, and Family – to communicate and share information securely online in real-time, eliminating mailing and faxing paper forms. This was important for her daily Broker activities but became extremely vital during COVID when all services and meetings were conducted remotely.

Using EMPOWER™ Donna can draft, access, and edit, the most updated versions of an Individual's Staff Action Plan, view service documents, and create and manage budgets. She documents meetings online - even during the actual sessions - and links the notes to Plans in the system. Once entered, all of these documents are available to the entire care team.

EMPOWER™ also collects all the varied info that Donna needs for her approval process. The eVero mobile app tracks Staff's clock-ins and -outs, and lets them enter mileage, eliminating paper forms and eliminating potential fraud. Families now scan, upload, and send her receipt images directly via the app, further simplifying data collection which streamlines the reimbursement process.

Donna believes that she isn't doing her job if she doesn't look at every budget every month. She relies on a variety of EMPOWER™'s reports, dashboards, and widgets to stay on top of everything budget and billing related for all of the Individuals she supports. Reports that she finds vital to her job include:

- **Broker Billing Status by Individual** – this lets her keep an eye on every budget that she manages, showing her spend and remaining dollars in each category. With this detailed insight, she can ensure that all her clients are utilizing their services, and she can also reconcile her FI billing.
- **Budgets Near Cap** – this identifies Individuals that are getting close to their limit on any budget line item, based on a usage percentage that she selects.
- **Yearly Expenditures** – this itemizes all of her budgets for a 12-month period so she can see usage trends, such as months when certain budgets are used most, and amounts that need to be tweaked for future periods.
- **Broker Invoice Detail** – this report tracks if an FI received, and approved, the Support Broker billing that was submitted. It also will map invoices to actual payments issues, so Donna knows what items were covered in each FI payment check.

Donna can set up widgets on her main EMPOWER™ dashboard to instantly show her key items – like Budgets near Cap – so she doesn't have to search. She can also easily create OPWDD documents – like the Cost Neutral Budget Amendment (CNBA) - right in the system and have them pre-populated with key information. Before eVero, these tasks entailed reviewing dozens of paper reports, and manually collecting and entering data, which would become a big time drain as her business grew.

“eVero's reports and widgets let me keep an eye on every budget every month to help me ensure that I am offering full services to everyone that I support.”

Donna Febo | My Applied Personal Supports

