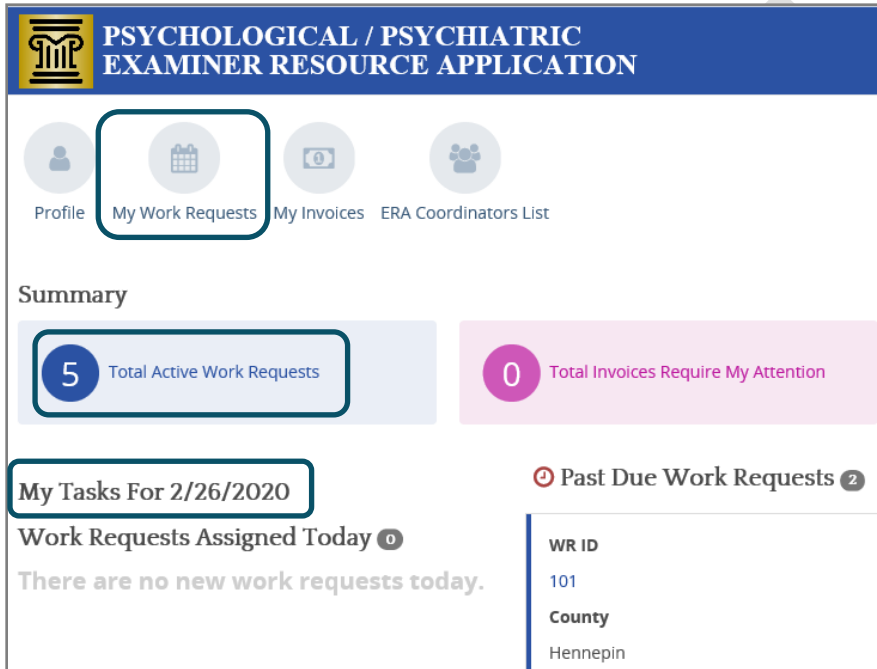


Quick Reference Guide Processing a Work Request for Examiners

Review the work request

- From the Examiner dashboard, to view assigned or all work requests, click
 - My Task For m/dd/yyyy** (today's date)
 - Total Active Work Requests** for all work requests assigned
 - My Work Requests**



**PSYCHOLOGICAL / PSYCHIATRIC
EXAMINER RESOURCE APPLICATION**

Profile **My Work Requests** My Invoices ERA Coordinators List

Summary

5 Total Active Work Requests

0 Total Invoices Require My Attention

My Tasks For 2/26/2020

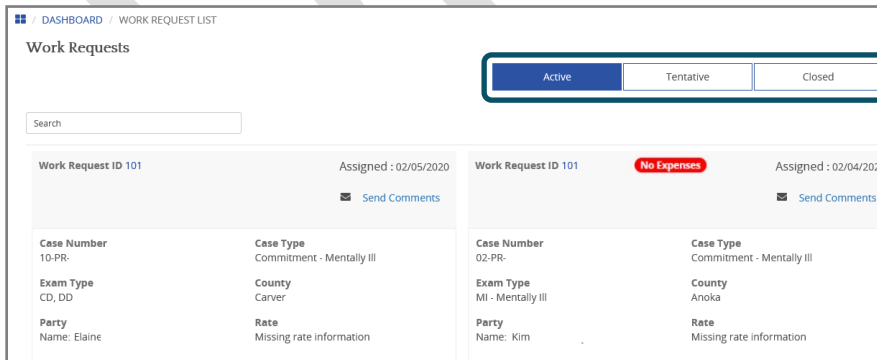
Work Requests Assigned Today **0**

There are no new work requests today.

Past Due Work Requests 2

WR ID	101
County	Hennepin

- Review **Active**, **Tentative**, and **Closed** work requests. If a work request was assigned by an institution, the institution name displays above the work request.



DASHBOARD / WORK REQUEST LIST

Work Requests

Active Tentative Closed

Search

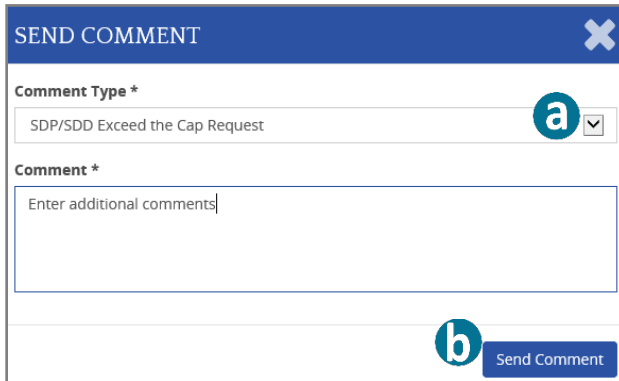
Work Request ID 101	Assigned : 02/05/2020	Work Request ID 101	No Expenses	Assigned : 02/04/2020
Case Number 10-PR	Case Type Commitment - Mentally Ill	Case Number 02-PR	Case Type Commitment - Mentally Ill	
Exam Type CD, DD	County Carver	Exam Type MI - Mentally Ill	County Anoka	
Party Name: Elaine	Rate Missing rate information	Party Name: Kim	Rate Missing rate information	




A red badge will appear on the work request card when there are no expenses entered.

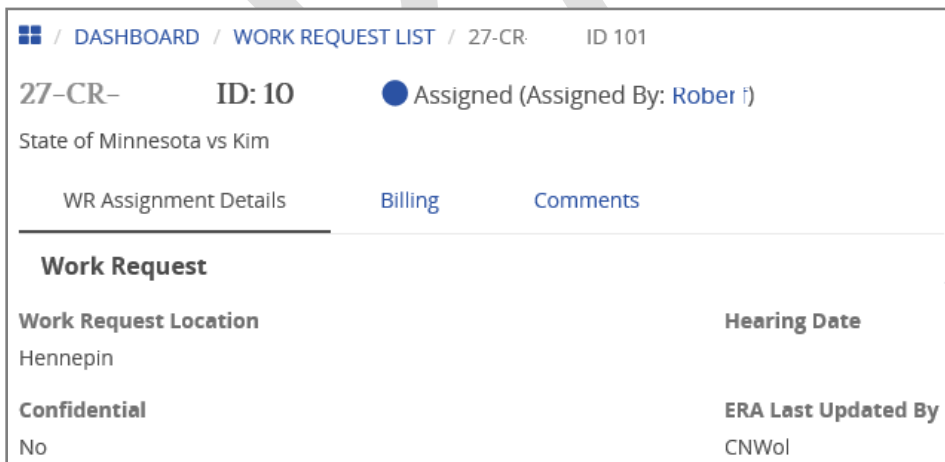
Quick Reference Guide Processing a Work Request for Examiners

3. Click **Send Comments** to send comments and questions to the Examiner Resource Application (ERA) Coordinator.
 - a. Select a **Comment Type** from the dropdown, and enter information as needed.
 - b. Click **Send Comment**.




 When a work request is sent for an exam in a confidential case, a coordinator will select an examiner to perform the work and the work request will then appear in the examiner's dashboard as a Tentative Work Request.

4. Click **Tentative** work requests to view the case and exam information, step 2. If the work request is confidential and you have not conducted the type of exam listed in the work request detail, contact the ERA Coordinator.



Work Request Location	Hearing Date
Hennepin	
Confidential	ERA Last Updated By
No	CNWol

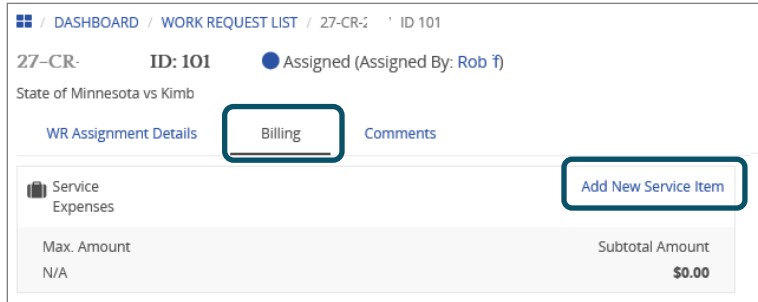
 If there are questions about a conflict of interest on any work request, contact the ERA Coordinator. If a conflict of interest is identified, the specific examiner can not take this work request. Close the work request with that reason (see page (Put page of where it shows how to close a work request)).

Quick Reference Guide Processing a Work Request for Examiners

Add a service or travel expense

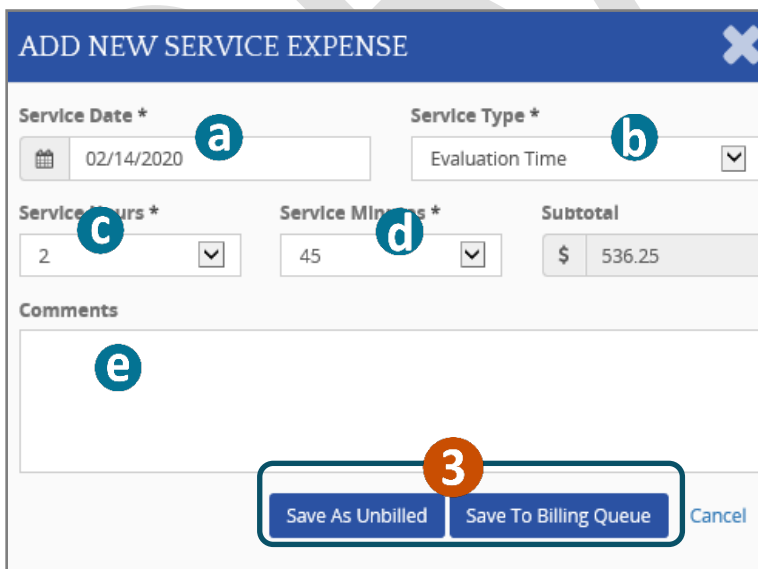
Each billing service and travel expense must be submitted separately.

1. Click the **Billing** tab on the work request, then click **Add New Service Item**.



The screenshot shows a web interface for a work request. At the top, there are navigation links: DASHBOARD / WORK REQUEST LIST / 27-CR-2 / ID 101. Below this, the case details are shown: 27-CR- ID: 101, Assigned (Assigned By: Rob f), and State of Minnesota vs Kimb. There are three tabs: WR Assignment Details, Billing (which is selected and highlighted with a red box), and Comments. Below the tabs, there is a section for Service Expenses. On the right side of this section, there is a button labeled 'Add New Service Item' which is also highlighted with a red box. At the bottom of the section, there are two fields: 'Max. Amount' with the value 'N/A' and 'Subtotal Amount' with the value '\$0.00'.

2. Enter the billing information:
 - a. Service Date
 - b. Service Type
 - c. Service Hours
 - d. Service Minutes
 - e. Add comments to explain how the expense help produce the evaluation and clarify all expenses listed
3. Click **Save As Unbilled** to save the information and submit later or **Save to Billing Queue** to save the expense to the billing queue for submission.



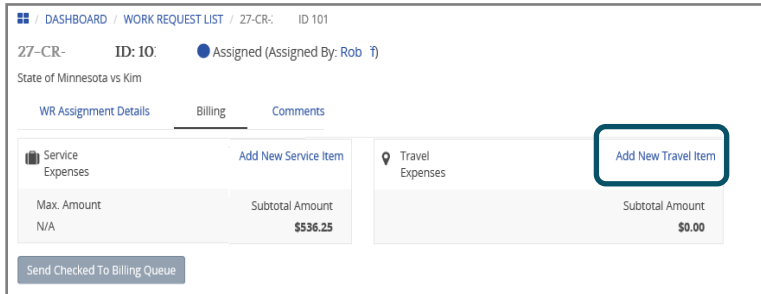
The screenshot shows a form titled 'ADD NEW SERVICE EXPENSE'. The form has a blue header with a close button (X). The form fields are:

- Service Date ***: A date picker showing '02/14/2020' with a red circle 'a' next to it.
- Service Type ***: A dropdown menu showing 'Evaluation Time' with a red circle 'b' next to it.
- Service Hours ***: A dropdown menu showing '2' with a red circle 'c' next to it.
- Service Minutes ***: A dropdown menu showing '45' with a red circle 'd' next to it.
- Subtotal**: A field showing '\$ 536.25'.
- Comments**: A text area with a red circle 'e' next to it.

 At the bottom of the form, there are three buttons: 'Save As Unbilled', 'Save To Billing Queue', and 'Cancel'. A red circle '3' is placed above the 'Save As Unbilled' and 'Save To Billing Queue' buttons, which are also highlighted with a red box.

Quick Reference Guide Processing a Work Request for Examiners

4. Click **Add New Travel Item** to enter travel expenses.



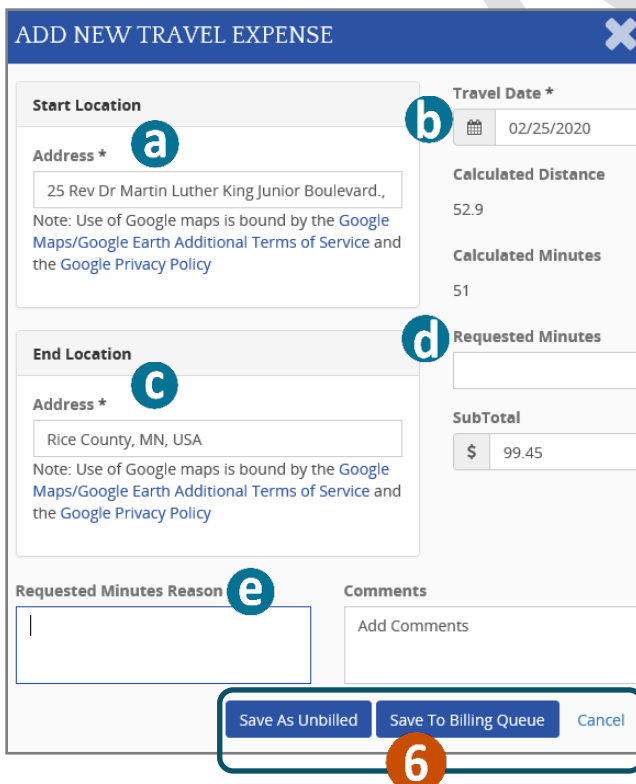
DASHBOARD / WORK REQUEST LIST / 27-CR- ID 101
27-CR- ID: 10: Assigned (Assigned By: Rob ?)
State of Minnesota vs Kim

WR Assignment Details Billing Comments

Service Expenses	Add New Service Item	Travel Expenses	Add New Travel Item
Max. Amount N/A	Subtotal Amount \$596.25		Subtotal Amount \$0.00

Send Checked To Billing Queue

5. Enter the travel information:
 - a. Start Location
 - b. Travel Date
 - c. End Location
 - d. Requested Minutes needed when additional minutes is beyond the calculated amount
 - e. Requested Minutes Reason or Comments to clarify all travel expenses listed
6. Click **Save As Unbilled** to save the information and submit later or **Save to Billing Queue** to save the expense to the billing queue for submission.



ADD NEW TRAVEL EXPENSE

Start Location **a**

Address * **a**
25 Rev Dr Martin Luther King Junior Boulevard,
Note: Use of Google maps is bound by the Google Maps/Google Earth Additional Terms of Service and the Google Privacy Policy

Travel Date * **b**
02/25/2020

Calculated Distance
52.9

Calculated Minutes
51

End Location **c**

Address * **c**
Rice County, MN, USA
Note: Use of Google maps is bound by the Google Maps/Google Earth Additional Terms of Service and the Google Privacy Policy

Requested Minutes **d**

Requested Minutes Reason **e**

Comments
Add Comments

SubTotal
\$ 99.45

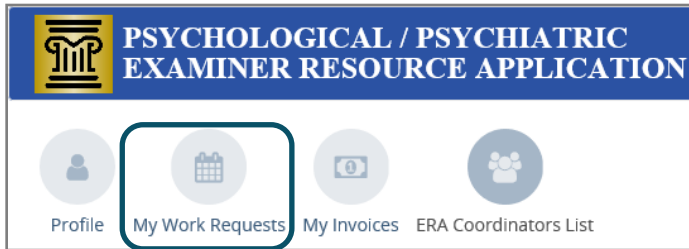
6

Save As Unbilled Save To Billing Queue Cancel

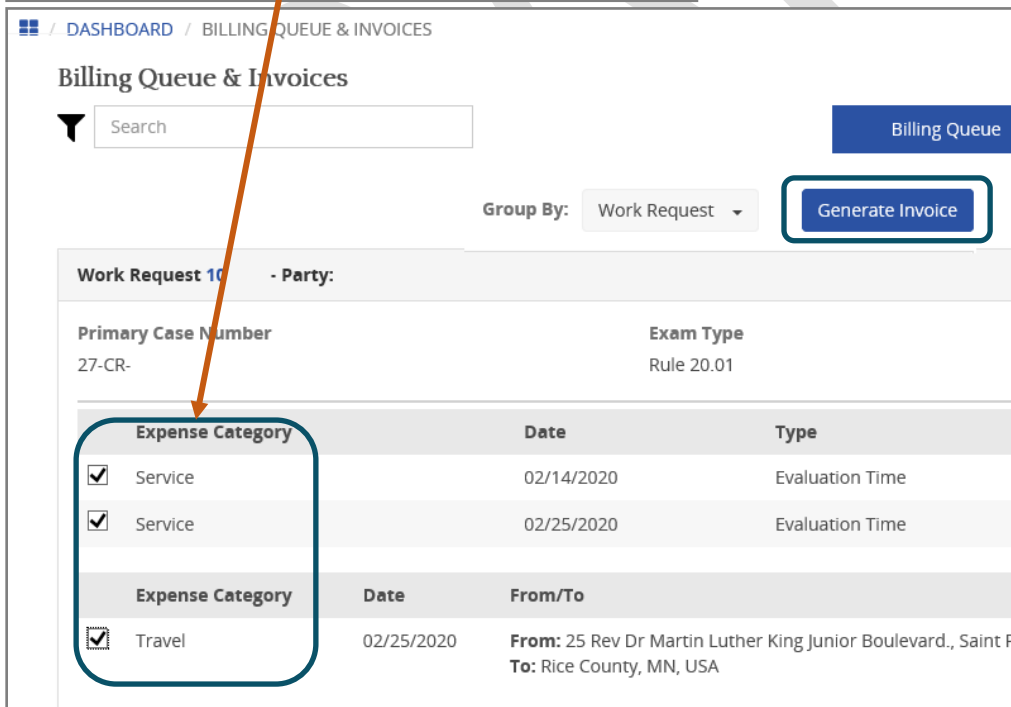
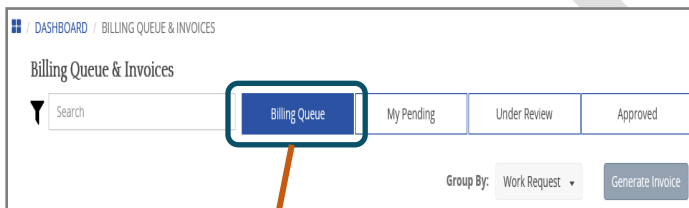
Quick Reference Guide Processing a Work Request for Examiners

Review and generate invoices

1. Click **My Invoices**.

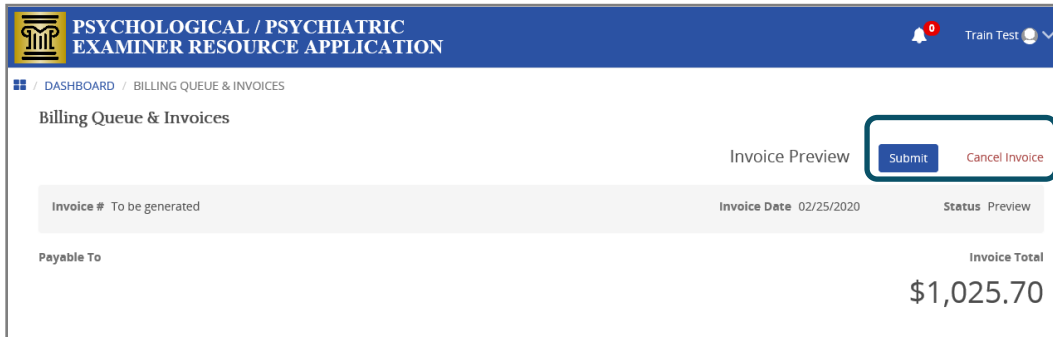


2. Click **Billing Queue**, If an invoice is already created, continue to step 3, check each expense category that should be added to the invoice.
3. Click **Generate Invoice**.



Quick Reference Guide Processing a Work Request for Examiners

- Review expenses to ensure they are accurate and then click **Submit** or **Cancel Invoice** if the information is incorrect or adjustment is needed.



PSYCHOLOGICAL / PSYCHIATRIC EXAMINER RESOURCE APPLICATION

DASHBOARD / BILLING QUEUE & INVOICES

Billing Queue & Invoices

Invoice Preview

Submit Cancel Invoice

Invoice # To be generated	Invoice Date 02/25/2020	Status Preview
Payable To		Invoice Total \$1,025.70

Edit a denied invoice

- Click **My Invoices** or **Total Invoices Require My Attention**.



PSYCHOLOGICAL / PSYCHIATRIC EXAMINER RESOURCE APPLICATION

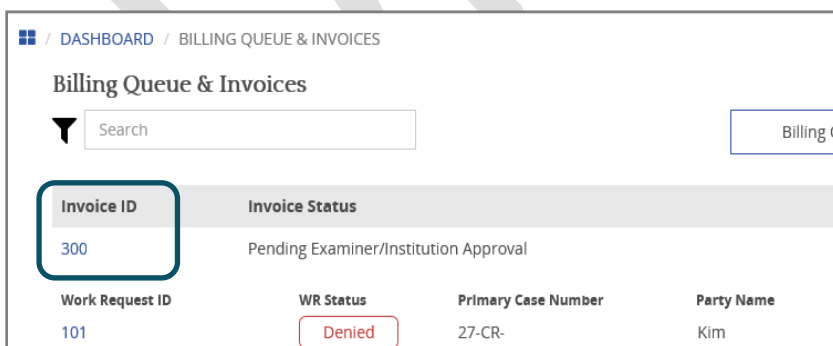
Profile My Work Requests **My Invoices** ERA Coordinators List

Summary

4 Total Active Work Requests

1 Total Invoices Require My Attention

- Click on the **Invoice ID**.



DASHBOARD / BILLING QUEUE & INVOICES

Billing Queue & Invoices

Search

Invoice ID	Invoice Status
300	Pending Examiner/Institution Approval

Work Request ID	WR Status	Primary Case Number	Party Name
101	Denied	27-CR-	Kim

Quick Reference Guide Processing a Work Request for Examiners

3. Click **WR Expense Denied Comments** to view the denial reasons.
4. Click the pencil icon in the service or travel expense to make edits.





DASHBOARD / BILLING QUEUE & INVOICES / 300

[Resubmit](#) [Cancel](#)

Invoice # 300 Invoice Date 02/25/2020 Status Pending Examiner/Institution Approval

Payable To: Robin, 500 N main, Le Sueur, MN 56058 Invoice Total: **\$1,025.70**

Work Request ID 101 Hennepin County [WR Expense Comments](#) [WR Expense Denied Comments](#) Denied

Date	Type	Hours	Rate	Comments	Amount
02/14/2020	Evaluation Time	2 Hours, 45 Minutes	\$195.00 per Hour		\$536.25  
02/25/2020	Evaluation Time	2 Hours	\$195.00 per Hour		\$390.00  
Service Subtotal					\$926.25

Comments	Amount
	\$536.25  
	\$390.00  
Service Subtotal \$926.25	

5. Make changes to the expense, and click **Save**.
6. Click the refresh icon in the top left-hand corner to update the invoice.






7. Click **Resubmit** in the upper right corner.

[Resubmit](#) [Cancel](#)

Status Pending Examiner/Institution Approval

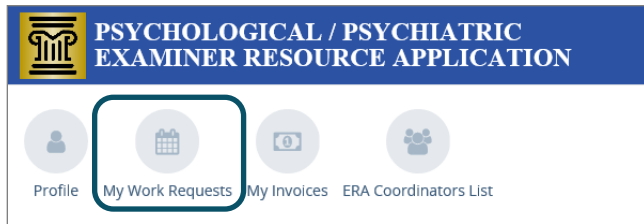


Examiners can edit or remove an existing expense. If a new expense needs to be added, the examiner will need to enter the new expense on the work request and generate a new invoice.

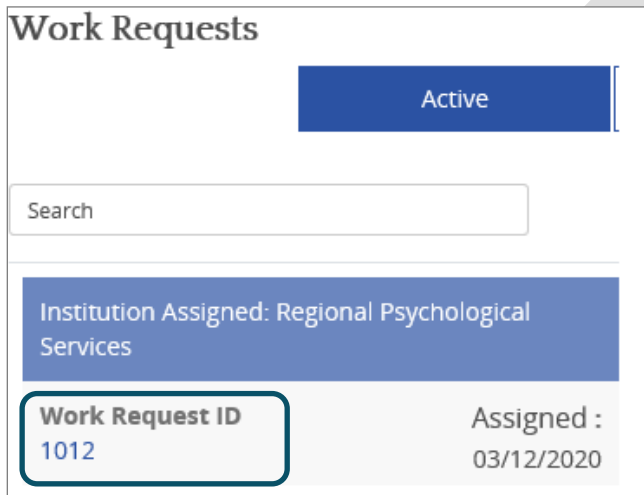
Quick Reference Guide Processing a Work Request for Examiners

Delete an unbilled expense

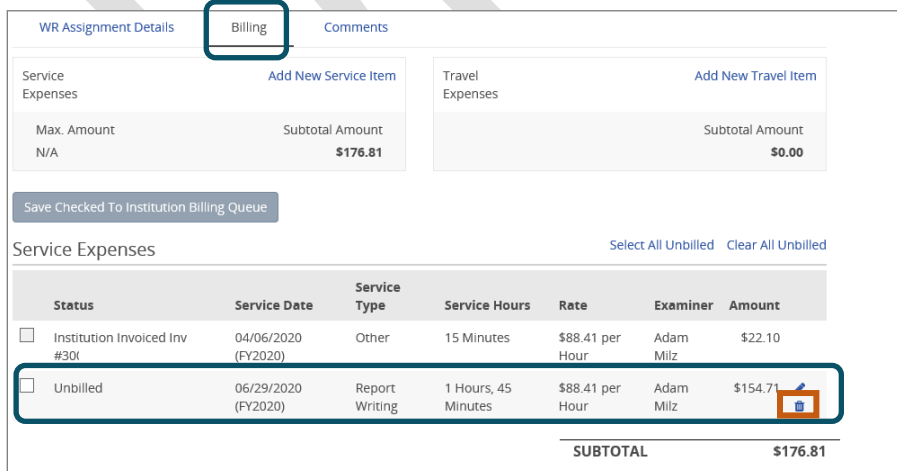
1. Click **My Work Requests**.



2. Click on the **Work Request ID** number.



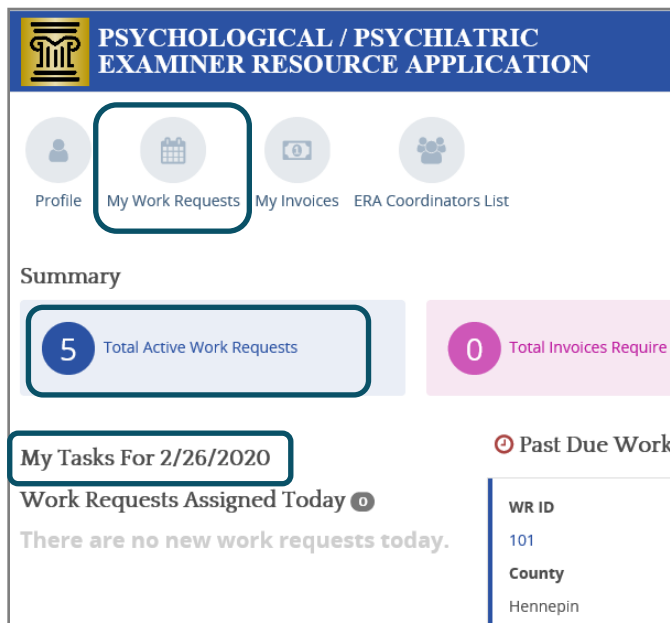
3. Click **Billing**. Any expenses that have not been sent to the billing queue are list in unbilled.
4. Click the trash next to the unbilled service types to delete.



Quick Reference Guide Processing a Work Request for Examiners

Close a work request

1. From the Examiner dashboard, to view assigned or all work requests, click
 - **My Task For 1/5/2023** (today's date)
 - **Total Active Work Request** for all work requests assigned
 - **My Work Requests**



**PSYCHOLOGICAL / PSYCHIATRIC
EXAMINER RESOURCE APPLICATION**

Profile My Work Requests My Invoices ERA Coordinators List

5 Total Active Work Requests

0 Total Invoices Require

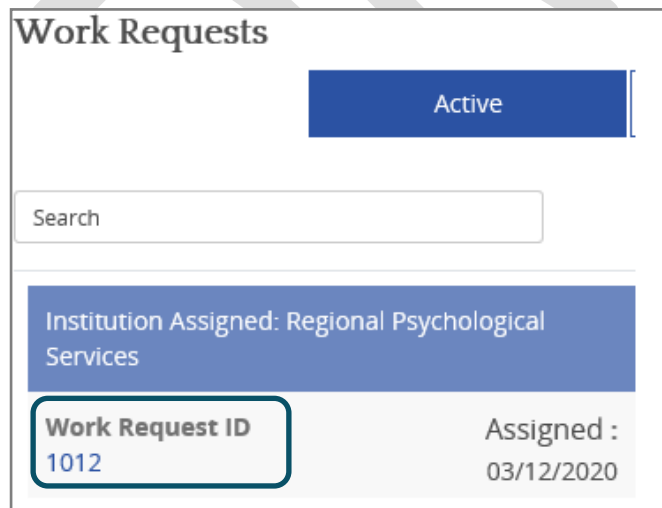
My Tasks For 2/26/2020

Work Requests Assigned Today 0

There are no new work requests today.

WR ID	101
County	Hennepin

2. Click on the **Work Request ID** number



Work Requests

Active

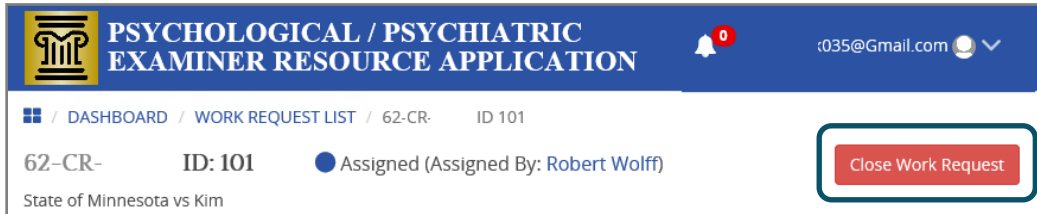
Search

Institution Assigned: Regional Psychological Services

Work Request ID	Assigned :
1012	03/12/2020

Quick Reference Guide Processing a Work Request for Examiners

- From the work request details page, click **Close Work Request**.

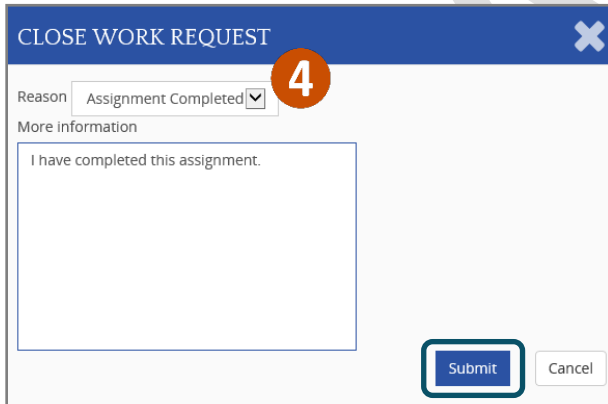


- Select a reason from the reason dropdown and enter more information if applicable to explain why the work request is close.

Reasons:

- The assignment is complete
- You were dismissed from the case
- The case is dismissed
- There is a conflict of interest

- Click **Submit**.



- Click **Yes** in the dialog, and the work request will change to **Closed** status.

