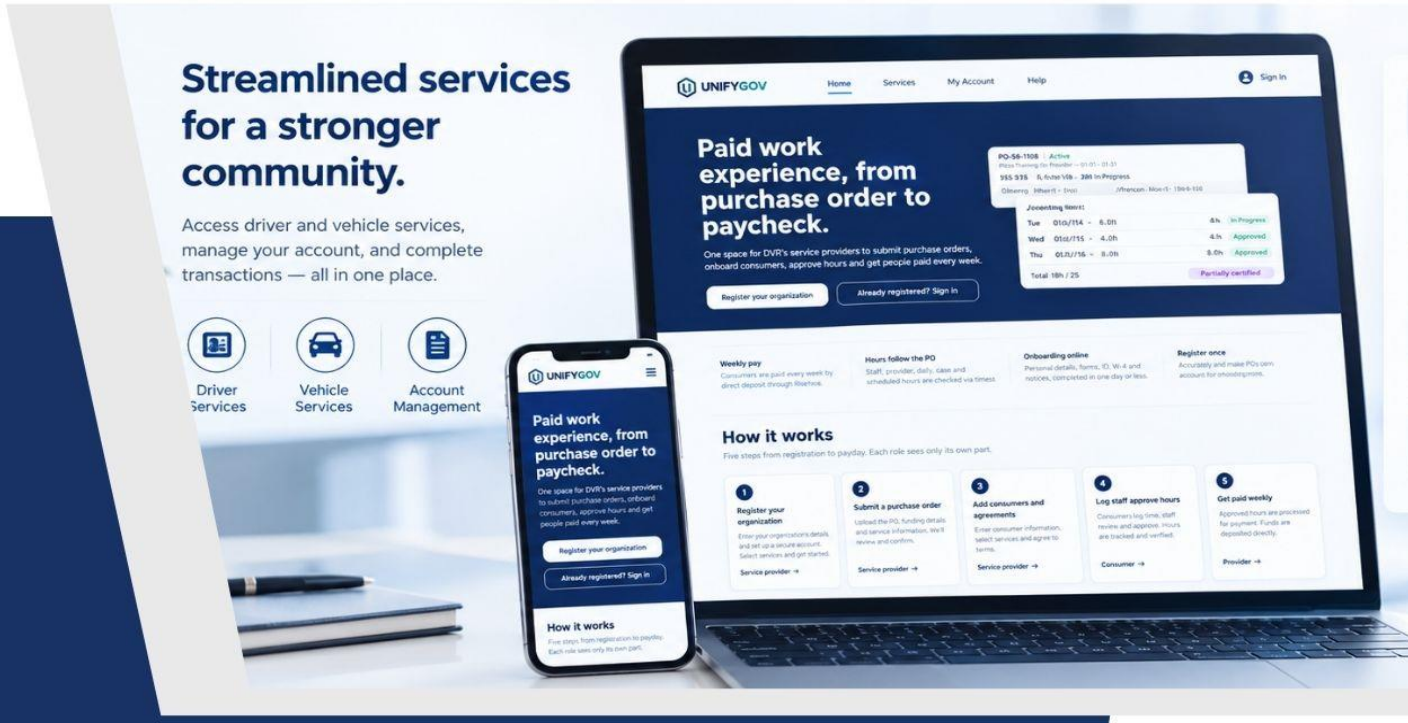


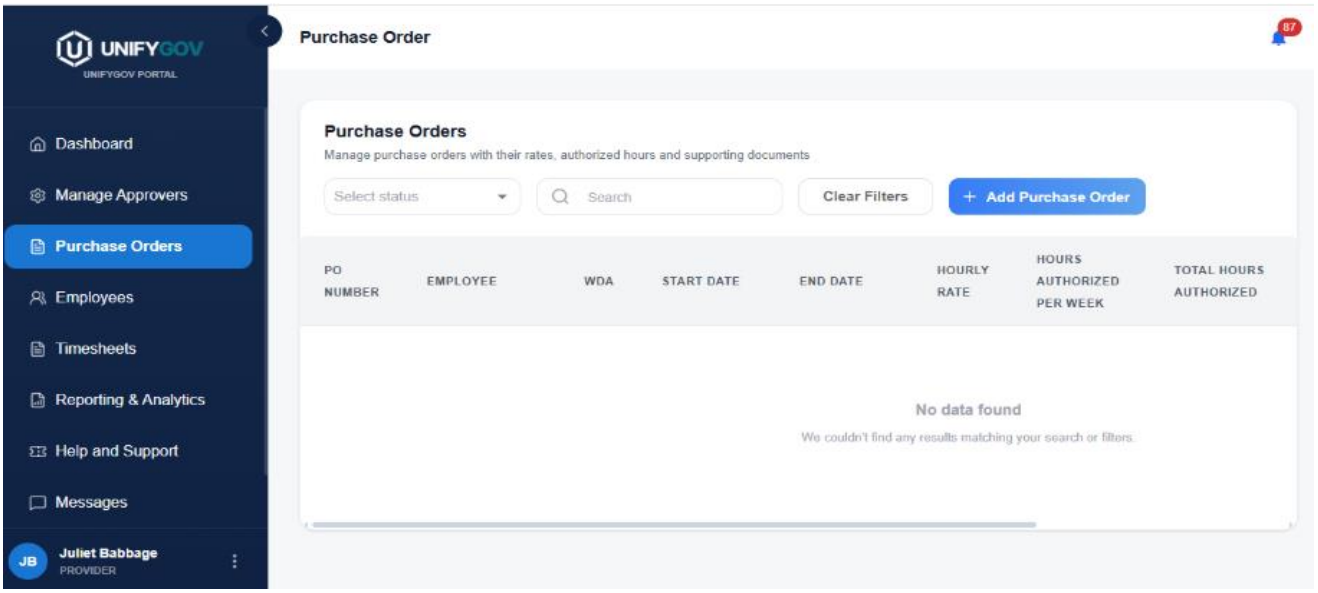
UNIFYGOV PORTAL

User Guide: Provider Purchase Order Workflows and Module Overview

Prepared By: InfoStride, Inc.

Purchase Order Management

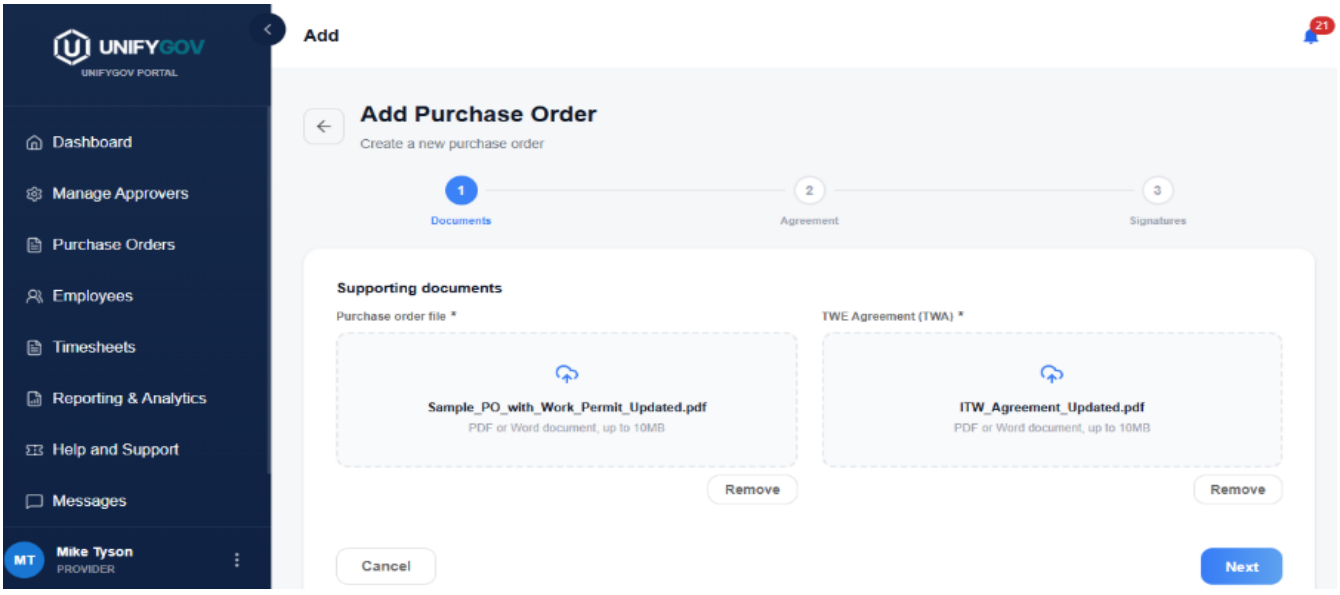
Step 1: Access the Purchase Orders Module



Steps:

- Click “Purchase Orders” in the left-side navigation menu.
- The Purchase Orders page opens where the Provider can view and manage purchase orders used for employee onboarding.
- Use the available options to:
  - **“Select status”:** Filter purchase orders by status.
  - **“Search”:** Find a specific purchase order.
  - **“Clear Filters”:** Reset the applied filters.
  - **“Add Purchase Order”:** Create a new purchase order for an employee.
- The purchase order list displays details such as PO Number, Employee, WDA, Start Date, End Date, Hourly Rate, Hours Authorized per Week and Total Hours Authorized.

Step 2: Upload Supporting Documents



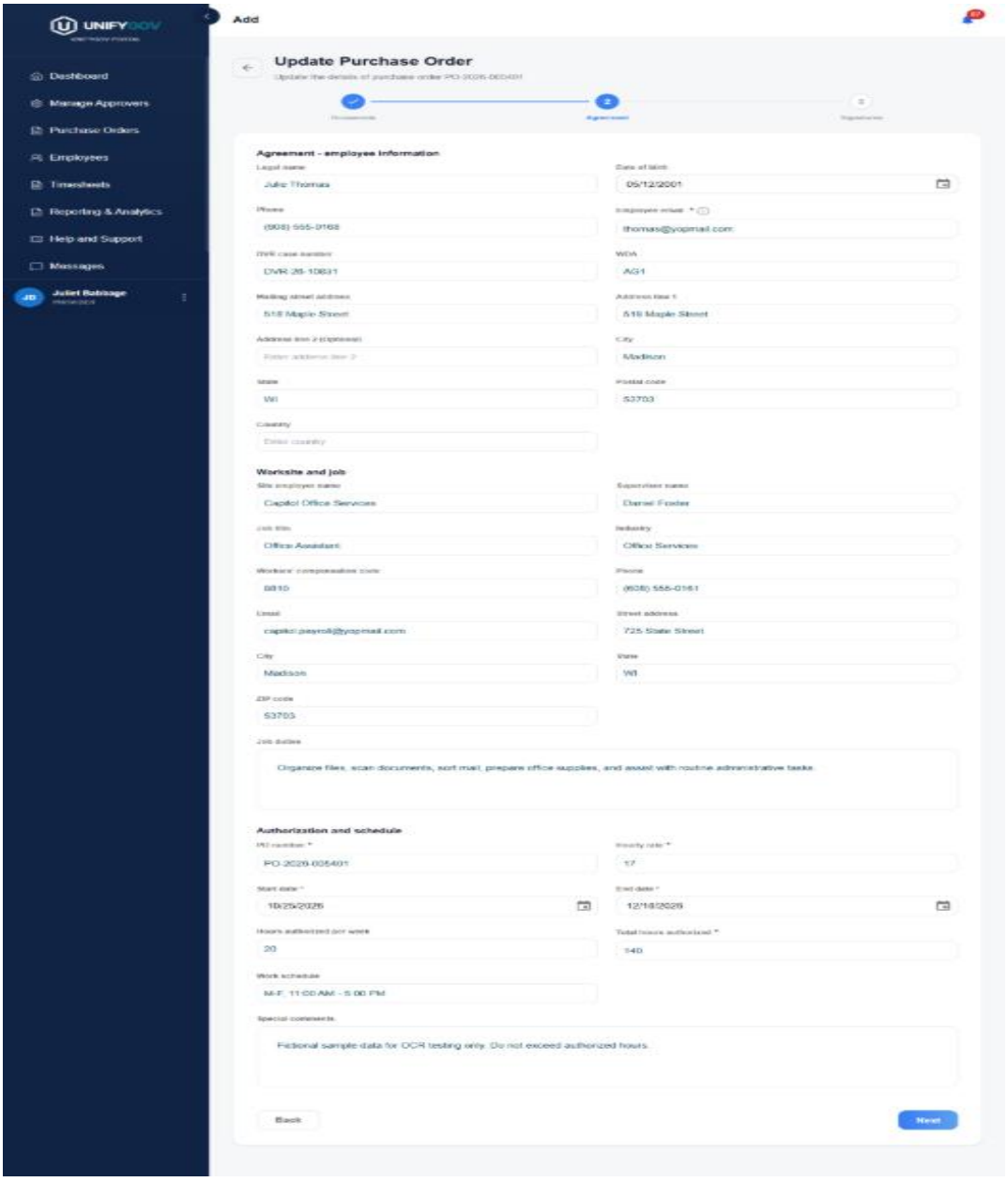
Steps:

- On Clicking “Purchase Orders” in the left-side navigation menu.
- On the Add Purchase Order page upload the required employee documents:
  - **“Purchase Order File”:** Upload the purchase order issued by DVR.
  - **“TWE Agreement (TWA)”:** Upload the completed Internship/Temporary Work Agreement.
- Ensure both documents are uploaded successfully.
- Click “Next” to proceed to the Agreement step.

Note: About the two documents

- **Purchase Order:** Confirms the approved services, purchase order number, authorized work dates, hours and payment details.
- **TWE Agreement (TWA):** Contains employee details, worksite information, job duties, work schedule, service provider details and the responsibilities of the parties involved along with the required signatures.

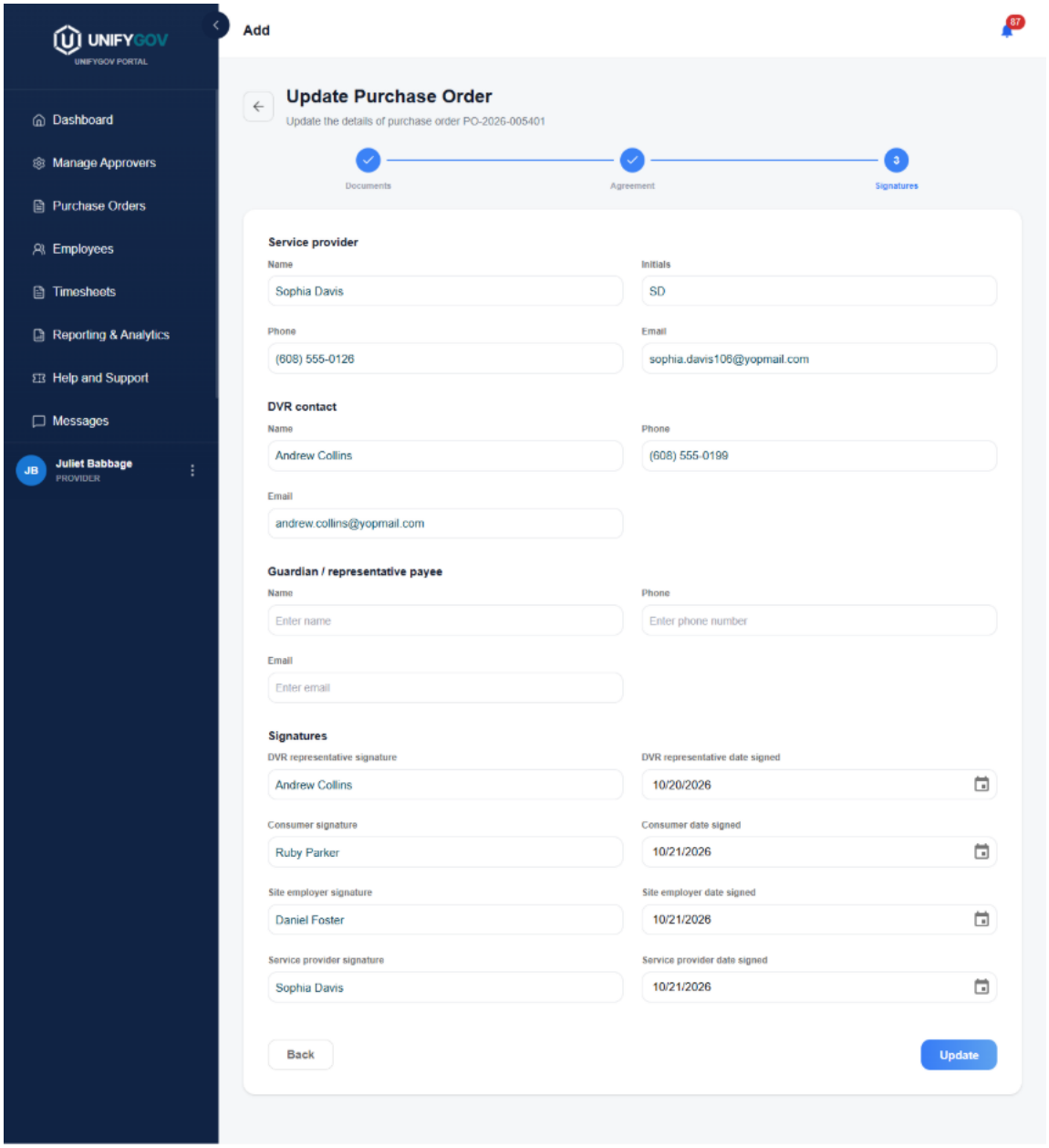
Step 3: Review and Update Agreement Details



Steps:

- After uploading both documents and clicking Next the Agreement page opens with the details from the uploaded documents.
- The Provider can review and update the information before proceeding including:
  - **Employee Information:** Name, date of birth, phone number, email, DVR case number and address.
  - **Worksite and Job Details:** Site employer name, supervisor, job title, industry, worksite contact details and job duties.
  - **Authorization and Schedule:** PO number, hourly rate, start date, end date, authorized hours and work schedule.
- Update any incorrect or missing information including the employee's email address or name as required.
- Once all details are reviewed and updated click "Next" to proceed to the Signatures step.

Step 4: Review and Update Signature Details



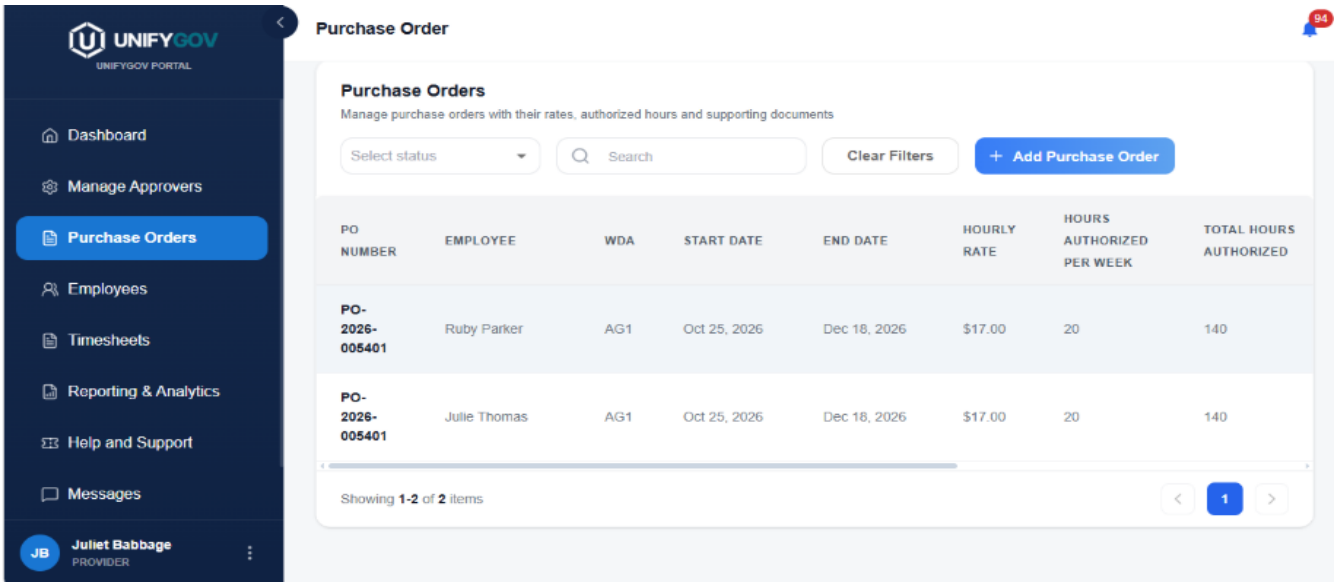
Steps:

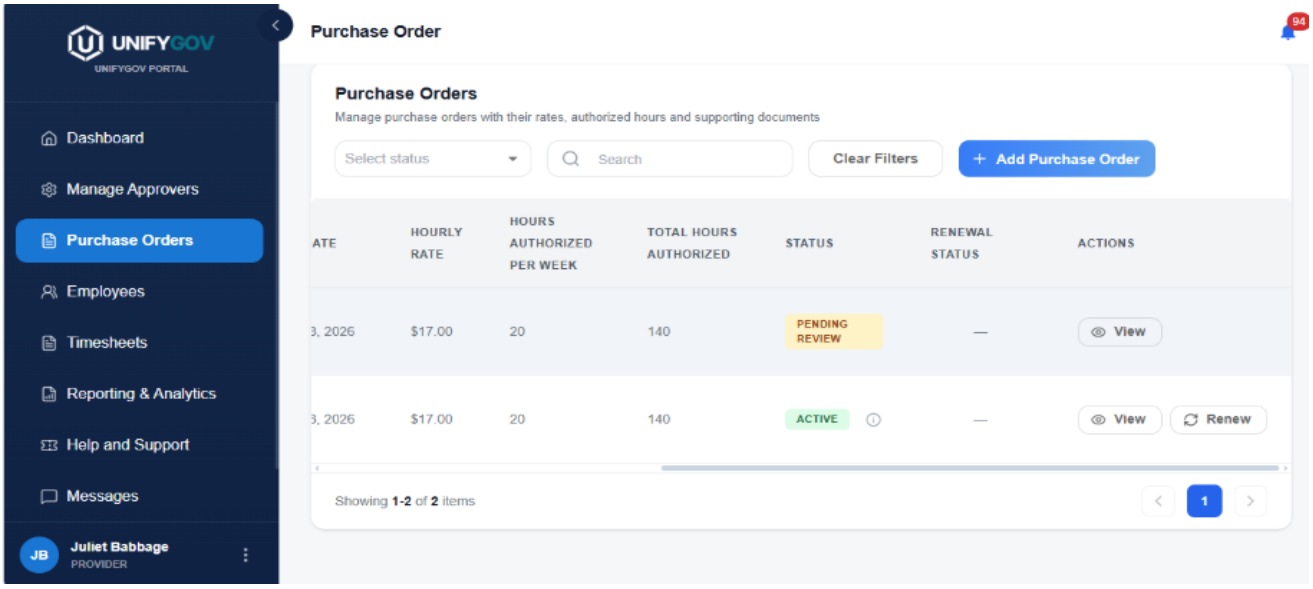
- After clicking "Next" on the Agreement page the Signatures screen appears.
- Review and update the information in the following sections:
  - **Service Provider:** Name, initials, phone number and email address.
  - **DVR Contact:** Name, phone number and email address.

- **Guardian / Representative Payee:** Enter the name, phone number and email address if applicable.
- **Signatures:** Review the names and signed dates for the DVR representative, employee, site employer and service provider.

- All fields on this screen are editable. Update the information as needed.
- Click "Update" to save the changes. Use "Back" to return to the previous screen.

Step 5: Review Purchase Order Status



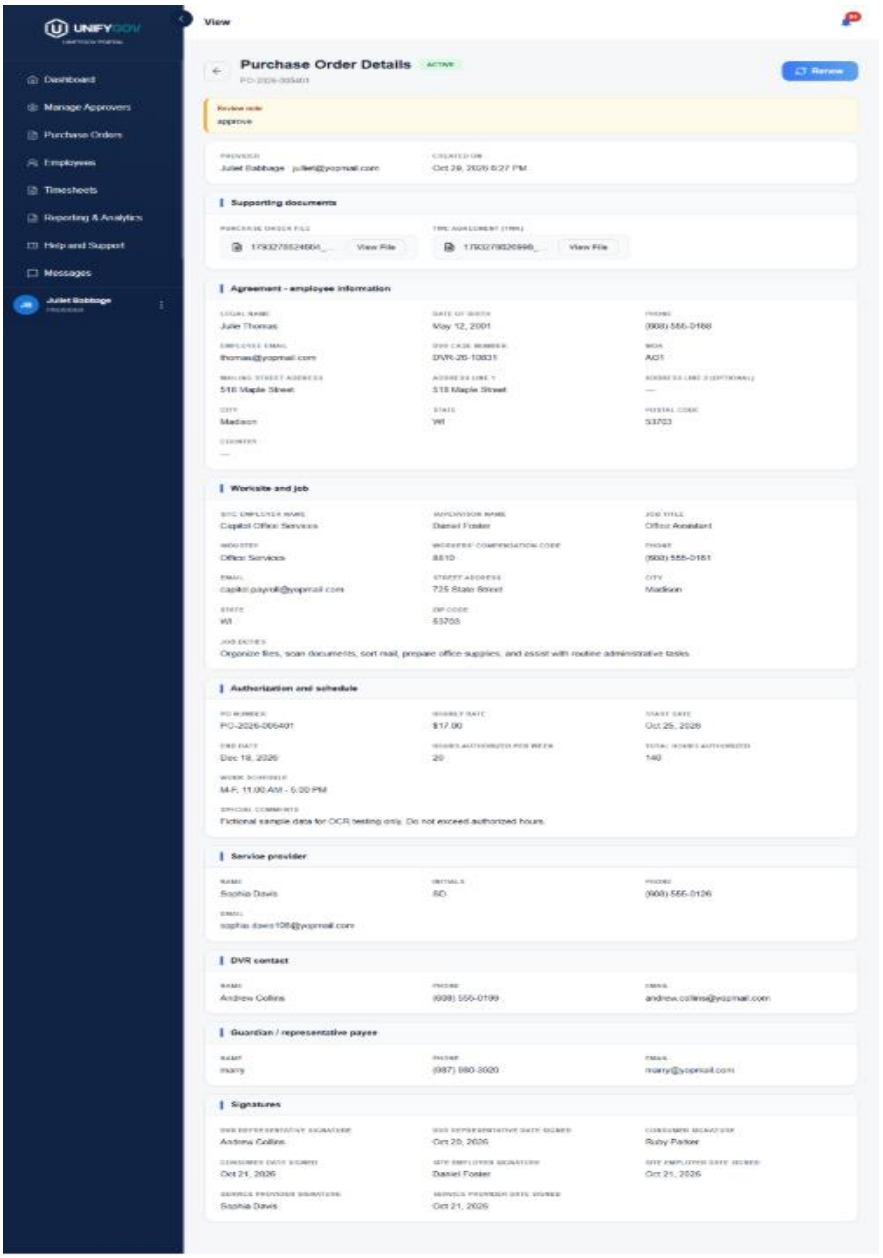


Steps:

- After clicking “Update” on the Signatures page the Provider returns to the Purchase Orders page.
- The purchase order appears in the list with details such as PO Number, Employee Name, WDA, Start Date, End Date, Hourly Rate and Authorized Hours.
- Scroll horizontally to view additional details including Status, Renewal Status and available actions.
- A newly submitted purchase order may appear as Pending Review until it has been reviewed and approved.

Note: Employee activation is handled internally by our team. Once the employee’s status is marked Active it means the employee’s work onboarding has been completed. The Provider does not need to activate the employee from this screen.

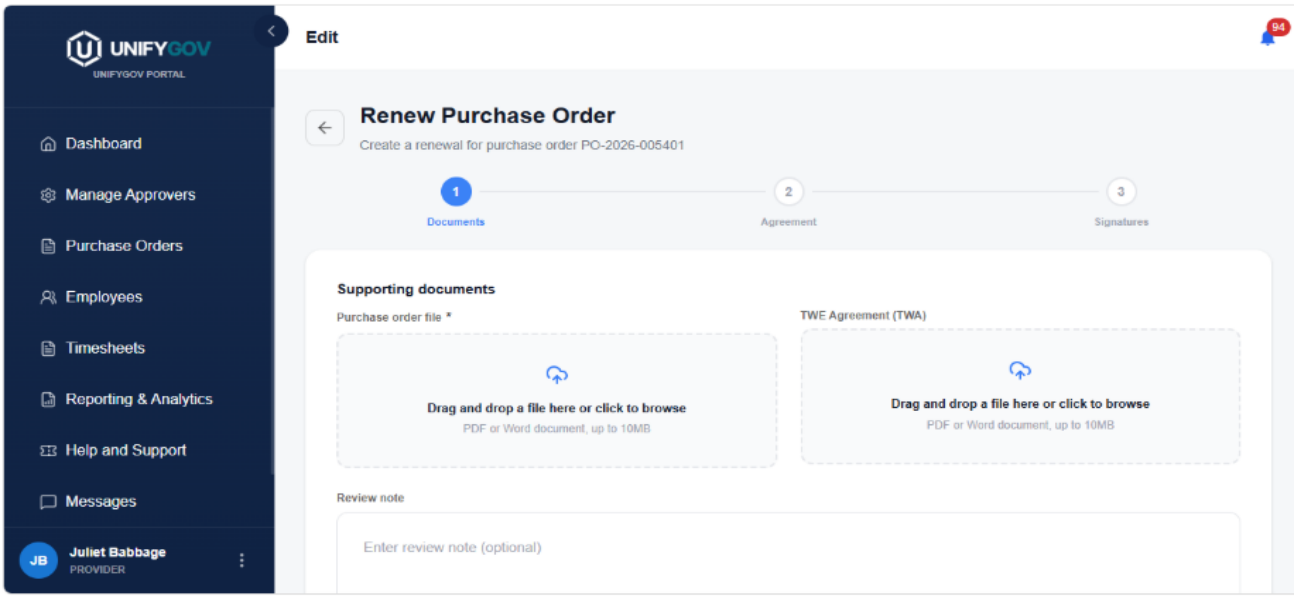
Step 6: View Purchase Order Details



Steps:

- On the Purchase Orders page click "View" to open the Purchase Order Details screen.
- Review the purchase order status, review notes, provider details and creation date.
- Under Supporting Documents click "View File" to open the uploaded Purchase Order or TWE Agreement.
- Review the Agreement - Employee information section including the employee's name, contact details, DVR case number and address.
- Review the Worksite and Job section for employer details, supervisor information, job duties and worksite contact details.
- Check the Authorization and Schedule section for the PO number, hourly rate, start and end dates, authorized hours and work schedule.
- Review the Service Provider, DVR Contact, Guardian / Representative Payee and Signatures sections to verify the information provided.
- The "Renew" button is available at the top of the page to initiate the purchase order renewal process when required.

Step 7: Renew Purchase Order



Steps:

- Once the employee is marked Active the Renew button becomes available on the Purchase Order Details page.
- Click “Renew” to start the renewal process and extend the employee’s approved work period.
- The Renew Purchase Order page opens where the Provider can upload the updated Purchase Order file and TWE Agreement.
- Add a Review note if needed then proceed with the renewal steps.
- The Provider can renew the purchase order while the current contract is active or before it expires.

Note: A newly submitted purchase order may initially appear as Pending Review. Employee activation is handled internally by our team. Once the employee’s status changes to Active it indicates that the employee’s work onboarding has been completed. The Provider does not need to activate the employee manually.