## **New IPF Process**

## This new process will ensure cohesiveness and security of the PHI data.

IPF is submitted in EIS by provider

OCFS will be automatically notified of IPF submission

If more information is needed after OCFS reviews the IPF, submitter will be notified by email that more information is required to complete the request. Submitter will go into EIS on the IPF form and scroll down towards the bottom in the "IPF Status" section

Status		Need More Information *
IPF Request Incomplete, Need More Information	~	what is need for more information will be in this box
		3947 characters remaining

Once approved or denied submitter will be notified through Email and will have a notification in EIS to download **approval** or **denial** letter. Submitter is responsible for printing and sharing with family/vendor. You will find them at the bottom of the IPF form in EIS in the "Documents" section. Click on the Download/Open box

Documents	
Approval Letter	Denial Letter
Type to search -	Type to search
Download / Open	Download / Open

After approved, submitter is responsible for uploading invoice and/or receipts in EIS (**must be in PDF**), within the people documents tab. Instructions on how to upload documents go the Quick links in the App Areas on the left hand side of the page or go to the CBHS EIS website

Once you have uploaded Invoice and/or Receipt you will need to go to the IPF form in EIS and check this box, this will send a notification to OCFS that Invoice and/or Receipt has been uploaded.

IPF Amount Requested The \$ amount request is what is being asked of CBH to fund after the parental and other fur	iding has been subtracted.
Total Amount Requested	IPF bill/receipt has been uploaded (QUICK LINKS for directions to upload
Total Amount Requested	

If vendor doesn't have a vendor code a W9 will have to be uploaded within the people documents tab (**must be in PDF**). Instructions on how to upload documents go the Quick links in the App Areas on the left-hand side of the page or go to the CBHS EIS website

## Data entry assistance please contact:

• Lynn Dorso, Desk 207-626-8651 or Cell 207-441-4767

## Specific Individual Planning Funds questions please contact:

• Judy Demerchant, Desk 207-493-4135 or Cell 207-551-2742