

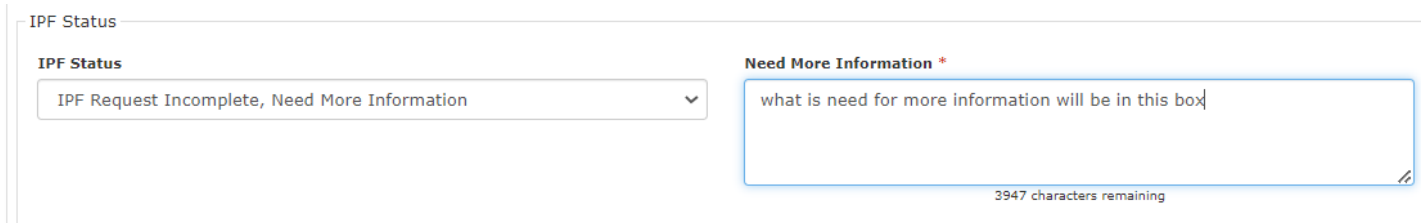
New IPF Process

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

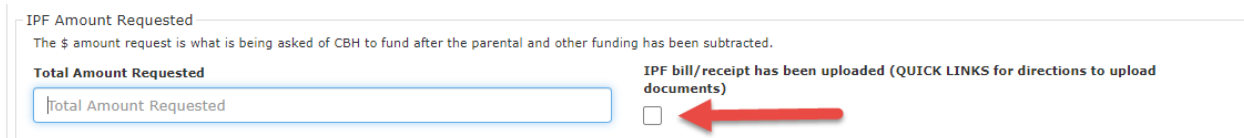
If more information is needed after OCFS reviews the IPF, submitter will be notified by email that more information is required to complete the request. Submitter will go into EIS on the IPF form and scroll down towards the bottom in the "IPF Status" section



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



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.



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