

# Broker Resources

Information specific to brokers.

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# Adding Group Jobs to a Participant's Plan

If you are creating a plan for a participant who is sharing staff with one or two other participants, the job description needs to be:

**# (participants' initials):1 Staffing - SHARED**

For example: 3 (AB and CD and EF):1 Staffing - SHARED

## **Important Notes:**

- Group jobs must be of the same budget type (ComHab > ComHab or SEMP > SEMP). You cannot mix ComHab on one participant's plan with SEMP on the other participant's plan.
- Participants in an IRA cannot be setup with group jobs.

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Created 05/10/24.

# Broker Invoicing

## Broker Rates

- If an invoice is submitted with an **incorrect broker rate**, our team will correct the rate in our system and process payment using the correct rate in the approved budget we have on file.
- This change is intended to prevent delays and avoid the need for invoices to be returned and resubmitted.
- Going forward, please make sure that all invoices you submit reflect the **broker rate from the approved budget**. This will help us keep the payment process efficient and ensure you are paid on time.

## How were services provided?

It's important to indicate whether services were provided via Face to Face or via Telehealth.

- Use Face to Face when services are delivered in person.
- Use Telehealth plus the method in which the meeting was held (audio/visual platforms or by phone) when supports are provided virtually—especially during Planning Team Meetings (PTMs).

These distinctions are tied to different billing codes and are essential for accurate processing.

## Broker Communications

An email has been created to address Broker concerns, questions and or issues.

[brokersupport@issny.org](mailto:brokersupport@issny.org)

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Created 10/29/25.

# Broker Meeting Minutes

How to upload and view Broker Meeting Minutes in the portal.

Broker Meeting Minutes

# Broker Meeting Minutes Upload Guide

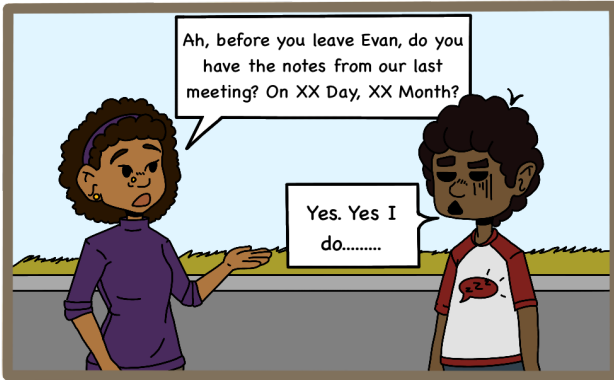
---

[Download PDF](#)

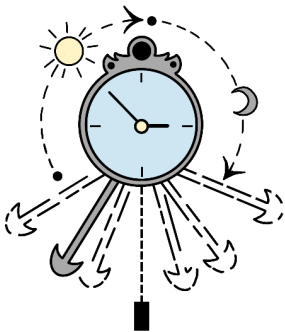
Broker Meeting Minutes

# Upload Broker Meeting Minutes (Brokers Only)

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*Some ambiguous amount*



*of time later.....*



1. From the home page, click **Submit Broker Minutes**.

## Welcome Johnny AppleSeed Broker DEMO



|  |   |
|--|---|
| <p>Submit Broker Minutes</p> <p>Click here to upload broker minutes.</p> <p><b>Submit Broker Minutes</b></p> | <p>SEMP Survey</p> <p>Click here to navigate to the SEMP Survey.</p> <p>Go to SEMP Survey</p> |
|--|---|

2. Complete the form. Click **Submit** when done.

\*Uploaded files must be PDFs.

\*The SD Coordinator will need to approve the uploaded document. Until it is approved, it will have a status of "Pending".

### Submit Your Minutes

**Document Name**

**Participant**

Select a Participant

**Meeting Date**

**Upload Broker Meeting Minutes**

Drag and drop a file here to upload, or [click here](#) to choose a file.

**Comments**

Characters Remaining: 255

**Submit**

[Close This Window](#)

3. Close the window when finished



# View Broker Meeting Minutes

1. From the home page, select the participant from the list.


**Choose A Participant**

**Jameson DEMO, James**  
Medicalid: 67890XYZ-CR  
DOB: 1/1/1990  
Title: **Support Broker**  
Coordinator: ISS Test

**Maryson DEMO, Mary**  
Medicalid: 12345XYZ  
DOB: 1/1/1980  
Title: **SEMP Reporter, Support Broker**  
Coordinator: ISS Test

**Thompson DEMO, Thomas**  
Medicalid: 12345BMW  
DOB: 1/1/1970  
Title: **Support Broker**  
Coordinator: ISS Test

2. Select the Documents tab across the top.

Dashboard   Budget   **Documents**   Staff Action Plan   Hab Plan   Contacts   

3. Select the Plan Documents tab.

**View All** 

Timesheets   Expenses Pg 0 of 0   **Plan Documents**

4. Broker Meeting Minutes are listed under their category heading.  
5. Click Download to download the file.

**BROKER MEETING MINUTES**

| NAME            | STATUS   | MEETING DATE | ACTIONS         |
|-----------------|----------|--------------|-----------------|
| Test 12/10/2019 | Approved | 12/06/2019   | <b>Download</b> |

# Inviting New Brokers to the Portal

Hello Brokers!

Welcome aboard! We are excited to have you with us! Below is information on our Portal. This information will include an explanation of the portal, its use, what you should be doing in the portal, and how to login.

The Portal has three different levels of access to the same data: read only access, approver level access for day to day operational control (such as approval of timesheets and expenses), and setup access for SD Plan setup and adjustments (broker level access).

Each broker will have a dashboard for all the people he or she supports, which shows all the information in one place. This information will include the submitted timesheets for staff, the year to date budget summaries, approved budgets, and a place to complete the Staff Action Plan so that it is uploaded to our system and then can generate timesheets and other documentation.

The Participant or their family will have access to all of the same things as the broker, in addition to being able to sign off on documentation.

We are so excited for you to see this Portal and all that it has to offer. We are confident that it will benefit everyone involved! The Portal will be able to provide information on how much has been spent out on each budget line, as well as how much is remaining. You will be able to access that information whenever you would need to, and it will be more accurate than the year to date reports of the past.

Here's where we need your help:

## **Verify / Approve Contacts:**

In order to assist everyone in the best way possible, we need to verify that the Portal has all the correct contact information. We need you to verify and/or correct the contact information for each of the three main contacts: participant, primary contact, and broker. We are asking for your assistance in making sure we have the correct contact information for each person that you support. Correct email addresses are absolutely crucial to ensure the Portal can function in the best way possible. Once you have acknowledged the accuracy of the participant and primary contact information, we will automatically invite them to the Portal.

## **Populate Participant Staff Action Plans:**

We're providing you with the ability to populate the Staff Actions Plan, both Outcomes and Safeguards, for each participant. Upon completion, we will create and send to you a formatted and complete PDF that you can send to the Care Manager. In addition, we will use this information to create new integrated time and billing sheets for support staff.

## **How do you log in?**

Simply point your browser to: <https://portal.issny.org/>

If this is your first time logging in, your temporary credentials will be emailed to you.

Please take the time to sign into the Portal and update the contact information. If you have technical issues, please email our Web Support Team ([websupport@issny.org](mailto:websupport@issny.org)) directly.

Thank you so much!

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Updated 08/30/21

# Self-Directed Service Termination/Transfer Form

This form is used as a communication and process coordination tool when Support Brokerage and/or Fiscal Intermediary (FI) services are terminating, changing, or transferring, and/or when a Participant is transferring between OPWDD Developmental Disabilities Regional Field Offices (DDRFO).

This form does not approve or deny services and does not by itself remove authorization of services from the participant's Self-Direction Budget or Life Plan.

The form is used to document notice, establish effective dates, and support coordinated action among the Participant/Representative, providers, Care Manager, and OPWDD.

**Per OPWDD, effective 06/04/26, all forms submitted to the Regional Field Office (RFO) must use the revised form (Rev. 5/18/26).**

[Self-Directed Service Termination/Transfer Form Rev. 5/18/26 \(PDF\)](#)

## Instructions

The instructions provide guidance on completing and submitting the form and are intended to promote consistent processing of Self-Directed terminations and transfers.

[OPWDD's Self-Direction Services Termination/Transfer Form Instructions Rev. 5/18/26 \(PDF\)](#)

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Updated 06/05/26.

# Staff Action Plans

How to create, sign, and submit a Staff Action Plan.

Staff Action Plans

# Creating your First Staff Action Plan

Updated 2/13/2024

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<https://player.vimeo.com/video/912698389?title=0&byline=0>

Staff Action Plans

# Signing your First Staff Action Plan

Updated 2/13/2024

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<https://player.vimeo.com/video/912698280?title=0&byline=0>

Staff Action Plans

# Uploading your Signed Staff Action Plan

Updated 2/13/2024

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<https://player.vimeo.com/video/912698353?title=0&byline=0>

# Staff Action Plan Upload Guide

This document outlines the process for finalizing and signing a Staff Action Plan.

1. From the Dashboard for a Participant, select the **Staff Action Plan** tab.

ISS INDEPENDENT SUPPORT SERVICES INC. *Make your Own Path*

Dashboard Budget Documents **Staff Action Plan** Hab Plan Contacts

### Dashboard For Thomas Thompson Demo

| MEDICAID   | OTPS  | REMAINING PERCENTAGES   |
|--|---|---|
| <b>\$0.00</b><br>spent out of <b>\$68,768.80</b><br>100% Remaining | <b>\$0.00</b><br>spent out of <b>\$1,350.00</b><br>100% Remaining | COMHAB 100% ><br>BROKERAGE 100% ><br>COMMUNITY CLASSES 100% ><br>MEMBERSHIPS 100% > |

Viewing Budget for:  [Detail View >](#)

2. Click the **Draft Plan** button.

ISS INDEPENDENT SUPPORT SERVICES INC. *Make your Own Path*

Dashboard Budget Documents **Staff Action Plan** Hab Plan Contacts

### Current Staff Action Plan For Thomas Thompson DEMO

This is the current Staff Action Plan and is not editable.

[Current Plan](#) [Draft Plan](#)

3. Finalize the plan
  1. Select an option for Care Coordination Organization.
  2. Fill in Review Date and Distribution Date.
  3. Click **Finalize**.

## Draft Staff Action Plan For Thomas Thompson DEMO

Current Plan **Draft Plan**

This Staff Action Plan is in draft mode and is editable.

### Participant Name

Thomas Thompson DEMO

### Medicaid CIN

TT00000T

### Care Coordination Organization

1 Please select...

### Dates

2 mm/dd/yyyy

Review Date

mm/dd/yyyy

Distribution Date

3 Finalize Delete Download Draft PDF



**OUTCOMES COMPLETED**

CLICK TO VIEW



**PLAN SAFEGUARDS COMPLETED**

CLICK TO VIEW



**SD SAFEGUARDS COMPLETED**

CLICK TO VIEW

#### 4. Add broker signature

1. Sign or type a signature for Broker Signature
2. Click **Save Signature**.

### Signature Method

Sign Type

### Broker Signature

Sign above with your finger or mouse

Clear

Save Signature

Approve

Cancel

Download Draft PDF

#### 5. Get Participant Signature:

There are two options for this: an electronic signature, or print and sign.

##### 1. Option 1: Electronic Signature

- If the Participant has login credentials to the portal and are present, they can enter their credentials in the form fields to validate.



Rather print and sign?

If you are with the participant or designee, please have them login and below. Otherwise choose the print and sign option.

**Participant Login**

Login Email Address

**Participant Password**

Login Password

LOGIN

Approve Cancel Download Draft PDF

## 2. Option 2: Print and Sign

1. If the participant does not have login credentials to the portal or is not present, select **Rather print and sign?**

Rather print and sign?

If you are with the participant or designee, please have them login and below. Otherwise choose the print and sign option.

**Participant Login**

Login Email Address

**Participant Password**

Login Password

LOGIN

2. Click **Print & Sign.**

Rather sign electronically?

If you choose this option, your signature will not be stored online but rather the date you select this option.

Print & Sign

3. Click **Approve**.

**Broker Signature**



*Johnny Broker DEMO, title: Support Broker signed on June 11, 2019 @ 14:46*

**Participant Signature**

*Upon approval, you agree to download the document, print it off, collect the participant's signature, and upload a signed copy of the plan.*

*Johnny Broker DEMO, title: Support Broker selected print and sign on June 11, 2019 @ 14:48*

Approve

Cancel

Download Draft PDF

4. Click **Download PDF to Sign**.

**Participant Name**

Thomas Thompson DEMO

**Medicaid CIN**

TT00000T

**Care Coordination Organization**

Care Design NY

**Dates**

06/11/2019

Review Date

06/12/2019

Distribution Date

Download PDF to Sign

Upload Signed Plan




5. Print the PDF.
6. Have the Participant or Advocate sign the printed plan.

6. Upload the Signed Plan

1. Scan the signed plan.
2. From the Current Staff Action Plan page in the portal, click **Upload Signed Plan**.

**Current Staff Action Plan For Thomas Thompson DEMO** Current Plan Create New

This is the current Staff Action Plan and is not editable.

|   |   |  |
|---|---|--|
| <b>Participant Name</b><br>Thomas Thompson DEMO                         | <br><b>OUTCOMES COMPLETED</b><br>CLICK TO VIEW |  |
| <b>Medicaid CIN</b><br>TT00000T   |   |  |
| <b>Care Coordination Organization</b><br>Care Design NY                 |   |  |
| <b>Dates</b><br>06/11/2019<br>Review Date                               | 06/12/2019<br>Distribution Date   | <br><b>PLAN SAFEGUARDS COMPLETED</b><br>CLICK TO VIEW |
| <a href="#">Download PDF to Sign</a> <a href="#">Upload Signed Plan</a> |   |  |
|   |   | <br><b>SD SAFEGUARDS COMPLETED</b><br>CLICK TO VIEW   |

3. Drag and drop or click to select the scanned document.

**Upload Signed Plan** ×

Drag and drop your document here to upload, or click here to choose a document.

(Max file size: 20MB; Accepted file types: PDF)

7. Download Signed Plan

1. To download the signed plan that was uploaded, click **Download Signed Plan**.

# Current Staff Action Plan For Thomas Thompson DEMO

Current Plan

Create New

This is the current Staff Action Plan and is not editable.

Document uploaded successfully!

## Participant Name

Thomas Thompson DEMO

## Medicaid CIN

TT00000T

## Care Coordination Organization

Care Design NY

## Dates

06/11/2019

Review Date

06/12/2019

Distribution Date



OUTCOMES COMPLETED

CLICK TO VIEW



PLAN SAFEGUARDS COMPLETED

CLICK TO VIEW



SD SAFEGUARDS COMPLETED

CLICK TO VIEW

Download PDF to Sign

Download Signed Plan

# Staff Action Plan Character Limits

Below are the character limits for each field, organized by section of the Staff Action Plan. Exceeding these limits will cause an error.

## Outcomes

POMs Valued Outcome: 500

My Goal: 500

Provider Assigned Goal: 500

Staff will...: 65,535

This section MUST match the Life Plan, Section 2, exactly. If you have any questions regarding this information, please contact your Self Direction Coordinator.

#### POMs Valued Outcome

#### My Goal

#### Provider Assigned Goal

#### Service Type

Choose Service Type



#### Frequency

Choose Frequency



#### Type

Choose Outcome Type



### Staff Action Plan

Staff Will...



+ Add New

Submit

Cancel

# Plan Safeguards

Goal/Valued Outcome: 500  
Provider Assigned Safeguard: 500  
Action: 65,535

[Dashboard](#)

[Outcomes](#)

[Plan Safeguards](#)

[SD Safeguards](#)

[Add Safeguard](#)

This section must match the Life Plan, Section 3, exactly. If you have any questions regarding this information, please contact your Self Direction Coordinator.

## Goal/Valued Outcome

## Provider Assigned Safeguard

## Service Type

Choose Service Type

## Type

Choose Safeguard Type

## Staff Action Plan and Frequency

### Action

Staff Will...

Choose Frequency

Submit

Cancel

# SD Safeguards

Alt Description: 16,777,215  
Supports and services: 16,777,215  
Responsibility: 16,777,215

Other

**Description:**

**Supports and services:**

**Responsibility:**

Needs Support  No Support Required  Does not apply

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Updated 09/12/25.

# Staff Action Plan Q&A - Acronyms

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## Acronyms

- LP – Life Plan
- SAP – Staff Action Plan
- SDC – Self Direction Coordinator
- VO – Valued Outcome
- PAG – Provider Assigned Goal
- MSN – Monthly Summary Note

# Staff Action Plan Q&A - The Portal

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**Brokers will be prompted to change their password upon logging into the new portal. Will participants/designees also have this option?**

- Yes, all users will follow the same prompts upon login.
- If someone is having difficulty logging in or is not being prompted to sign into the new portal, they need to reach out to [websupport@issny.org](mailto:websupport@issny.org) for guidance.

**Is there a place on the portal to view specific budget line breakdowns, for example the fringe rate or amount of staff hours approved?**

- Not at this time, but that information can be found on the approved budget when you receive it from OPWDD.

**Do we need to reach out to the SDC to open up the SAPs for editing?**

- No. A feature of the new portal is that SAPs do not need to be opened up / rolled back for editing.

**Can we sign into the portal during/after the LP meeting to write the SAP right away?**

- You can, but please keep in mind that you cannot finalize the SAP until the LP is finalized, to ensure all information is accurate and consistent across all documents.

# Staff Action Plan Q&A - Goals

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## How many goals should an LP/SAP Plan have?

- There is no set rule, but CH and SEMP both must have at least once PAG in Section II assigned as a Goal or Support for billing purposes.

## How should I proceed if there are too many VOs? Some LPs have 10 or more.

- The circle should discuss which valued outcomes are most important to the participant at that time and focus on those for the SAP. If a valued outcome is not going to be worked on at this time, then it should be documented in the Life Plan.
- If a Care Manager or circle is stating that they do not want to prioritize the goals in the Life Plan, please refer to the "#8-2019 Care Coordination E-Visory." This document includes a CM training from OPWDD which states this is to be done.

## Does this mean that we can limit the goals on the timesheets?

- If a circle meets and determines that they are only working on a select number of the goals reflected in the LP, the goals chosen are the ones you will include in the SAP. From there, any PAG assigned as Goal or Support will generate on the timesheet.

## When it comes to the “type” of PAG, do we need to be concerned about what is billable and what is not?

- Yes. Goals and Supports are billable, Tasks are not. Tasks also will not show up on the timesheet. If you need a Task to be billable, please communicate this to the Care Manager and ask that it be reassigned as a Goal or Support.
- Even though Tasks are not billable, they still need to be included in the SAP.

## What is the frequency of the PAG?

- The PAG will have a frequency assigned to it in the Life Plan. It is typically assigned as “ongoing” or “as needed,” but other frequencies are acceptable.
- The only frequency that is not acceptable in the Life Plan is “hourly.” This would suggest that the staff are working on the valued outcome every hour, which is most often inaccurate.

## What should I do if a PAG is assigned to more than one type of staff, for example CH and SEMP?

- In this situation, the PAG would need to be added twice, once assigned to CH and once assigned to SEMP.

**Are brokers required to input SEMP and Respite goals? They were automatically generated in the HP.**

- Yes.
- CH and SEMP must have at least one PAG in the Life Plan, and you will add them to the SAP.
- Respite may not have a PAG in the Life Plan. In this instance, you will enter the following into the SAP:
  - Service Type: Respite
  - POMS: N/A
  - My Goal: I would like to provide my caregiver(s) with respite relief.
  - PAG: (S) Provide respite.
  - Frequency: As Needed
  - Staff Action: (G) Provide respite to the primary caregiver(s)

**Is there still specific verbiage required for SEMP?**

- No, because the verbiage from ISP to LP has changed. Because everything is generated from the POMS/LP, we don't really have a strong say in the verbiage. It will still need to make sense for the SEMP service (i.e. no volunteering).
- It would be in the broker's best interest when writing staff actions for a SH SEMP goal to reference the 18 allowable supports and services under the SEMP valued outcome of the older habilitation plans as well as the SEMP Administrative Memorandum. The wording does not have to be exact, however it should be referenced to ensure that the supports that staff are providing are in fact billable and allowable SEMP services. The 18 allowable supports and services are as follows:
  1. Vocational & skill assessment
  2. Person-centered employment planning & job related discovery
  3. Job development
  4. Training and systematic instruction prior to employment
  5. Job placement
  6. Job coaching, training, and planning within the work environment
  7. Development and review of a business plan (for individuals who are pursuing self-employment or are self-employed)
  8. Transportation between activities
  9. Travel training
  10. Development of social skills and social appropriateness in the workplace
  11. Benefits support and asset development
  12. Job retention and career advancement services
  13. Negotiating potential jobs with prospective employers on behalf of an individual
  14. Communication with current employer, family, and/or individual's planning team to discuss individual's progress, strengths, & areas of need
  15. Meetings and communication with staff providing other OPWDD approved services that impact an individual's ability to successfully achieve employment
  16. Documentation of the delivery of SEMP services (timesheet/monthly summary note)
  17. Workplace support services enabling individual to be integrated into job setting
  18. Other activities previously approved by OPWDD

**What service should a respite goal be assigned to?**

- A goal for Self-Hired Respite should be assigned to Self-Hired Respite.

**If a person has FRR in their budget, does this need to be reflected in the SAP?**

- No, the SAP is only for Self-Hired CH, Self-Hired Respite, and Self-Hired SEMP

# Staff Action Plan Q&A - SAP Specifics

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## Who needs a Staff Action Plan?

- An SAP is required for anyone with an LP who has Self-Hired CH, Respite, or SEMP.

## Do we have to create a new SAP every time a new staff is hired?

- If you are just hiring a new staff for an existing budget line, then no. They would continue to follow the SAP in place.
- If a new type of staffing is added to the budget (i.e. adding in SEMP), then the LP and SAP would need to be updated within 60 days of the service authorization date.

## The demo SAP from the state including a lot of detailed instruction. Is it okay if the staff action details are a bit shorter?

- The quality of the information is what is most important, not the length. As long as the staff action details show a staff not only what to do, but to how to do it, you should be okay.
- SDCs will be reviewing the SAPs as they come in and will let you know if there are any issues with the details of the plan.
- Please keep in mind that “short and sweet” should not be your intent, but “detailed and informed.” This document is written differently than a Hab Plan. Some staff action details will need to be lengthy.
- EXAMPLE:
  - POMS: People have the best possible health
  - My Goal: I want to lost weight so I can feel better
  - Provider Assigned Goal: (G) Provide exercise program
  - Staff Actions:
    - Staff will transport Johnny to and from the gym three times a week, for at least 30 minutes.
    - Staff will assist Johnny at the gym by helping him try different machines and classes to see what types of exercises he prefers.
    - Staff will provide oversight while Johnny is using the gym equipment to ensure he remains safe.
    - Staff will help Johnny look into other ways to exercise such as going for walks, playing sports, or swimming in his pool.

## What should the review and distribution dates be?

- The distribution date will always be the date you send the SAP out to the circle.
- For any Life Plan prior to 4/1/19, the SAP review date should be the date of the Life Plan (this will make the distribution date out of compliance – we know this and it is okay)
- For any Life Plan after 4/1/19, the SAP review date should be the date of the Life Plan, and it needs to be signed and distributed within 60 days to ensure you are in compliance.
- The order of the dates should be as follows:
  - Review date on or before the print date

- Print date on or before the signature date
- Signature date on or before the distribution date
- Distribution date on or after the signature date and within 60 days of the review date - the broker signature should always either match or be prior to the distribution date

### **Is the verbiage different from the HP to the SAP?**

- YES. The SAP should be detailing not just what staff should be doing, but how. It should provide details on how the staff can best assist the participant to achieve their valued outcome.
- Another change from the HP is that the HP often utilized person-first language. The VOs and PAGs in the LP will be set verbiage and may not be person-first, as they are often generic. The staff actions details that brokers will be writing will be directed at the staff as instructions, so the participant may be referenced in third person.

### **If we have already provided an SAP to ISS, on our own template, do we need to go back and enter it into Harmonix?**

- If you have already provided ISS with an SAP on your own template and it does not need corrections, we are asking that you enter it into Harmonix to ensure timesheets and MSNs are up to date. If you have any difficulty with this, please reach out to your SDC.
- If you have already provided ISS with an SAP on your own template and it does need corrections, you will need to enter it into Harmonix.
- If you have not provided ISS with an SAP, you will need to enter it into Harmonix.

### **The OPWDD SAP template does not require a participant/designee signature. Will ISS' require this?**

- Yes. The participant/designee signature is an ISS requirement.

### **Does the SAP need signatures before it is finalized?**

- The SAP is finalized prior to signing, once all necessary changes are made.

### **If I am the primary contact for the person I broker for, how should I sign?**

- You would sign as both the broker and the designee.

### **How do we get the participant/designee signature?**

- The participant/designee can either electronically sign in the portal, or it can be downloaded from the portal to print out.

### **Once they document is signed by all parties, how do we send it to the SDC?**

- If it was electronically signed by all parties, please let the SDC know and they will access it through Harmonix. If it was printed and physically signed, please send a copy to the SDC via mail or email.

# Staff Action Plan Q&A - Timesheets/MSNs

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## **Will each staff type still have their own timesheet?**

- Yes.

## **How will the information from the SAP translate to the timesheets/MSN?**

- The timesheets/MSN will include the Provider Assigned Goals and the staff action details.

## **How will the timesheets and MSNs be generated now?**

- Timesheets will continue to be generated by Harmonix until electronic timesheets are up and running.
- MSNs will continue to be generated by the Self-Direction Coordinator until electronic MSNs are up and running.

## **If a behavior, nursing, or other plan is referenced in the SAP, how will that translate onto the timesheet?**

- If there is another plan in place, please ensure that staff are aware, fully trained, and have access to a copy as needed. The timesheets are only reflecting the PAG and staff action details.

## **If we haven't completed an SAP yet, where can we find the current timesheet/MSN?**

- Please reach out to your SDC for all current timesheets and MSNs.

# Staff Action Plan Q&A - Other

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## **Some Life Plans had multiple meetings, were rescheduled, or never written. What should we do in these situations?**

- Brokers should reach out to the circle in these cases to ensure they have the most up to date documentation.
- The Life Plan window has been extended to 12/31/19, so some LPs have been scrapped in favor of an ISP review. In this case, only a Hab Plan would be required.

## **When should I receive the Life Plan, and from who?**

- The Care Manager is responsible for distributing the Life Plan and has a 45 day window from the date of the review.
- It is strongly recommended that you reach out to the CM for a draft of the Life Plan to ensure you do not need corrections before it is finalized, and that you reach out for the finalized Life Plan if you haven't received it by day 45.
- Please keep in mind that there are errors in the system that develops the Life Plan, and a lot of confusion re: the current guidance and requirements. Many Life Plans are being distributed late. If you are going to be outside of the 60 day window because you have not yet received the finalized Life Plan, please let your SDC know.

# SAP Timesheets

How to create, edit, view, and submit SAP Timesheets for Support Staff to use.

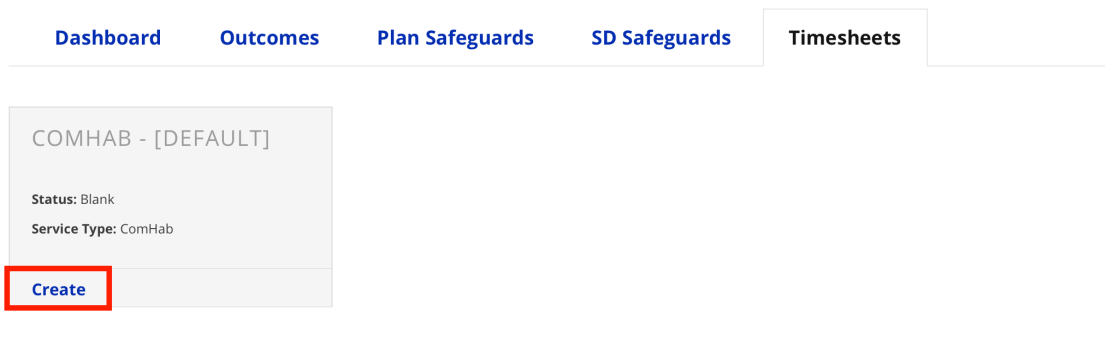
# Create SAP (Broker)

Timesheets can only be created for service types that are in a participant's budget. If an outcome exists in the Staff Action Plan for a service type not in the budget, the timesheet will have a status of "Not In Budget" and no action can be taken against it.

If a Respite outcome exists in the Staff Action Plan and Respite is in the budget, the Respite timesheet will be created automatically and cannot be edited. It will, however, still need to be approved before it can be used.

1. To create a timesheet, begin with a finalized and approved Staff Action Plan and navigate to the timesheets section.

## Create Timesheets For Mary Maryson DEMO



2. Click **Create** on the timesheet tile you would like to create.
3. Select the goals/outcomes to be included on the timesheet.
4. Click **Create**.





# View SAP

1. From the timesheets section, click **View** on the tile of the timesheet you wish to view.

The screenshot shows a web interface titled "Create Timesheets For Mary Maryson DEMO". At the top, there are navigation tabs: "Dashboard", "Outcomes", "Plan Safeguards", "SD Safeguards", and "Timesheets". Below the tabs is a card for "COMHAB - [DEFAULT]". The card displays "Status: Draft" and "Service Type: ComHab". At the bottom of the card, there are three buttons: "View", "Edit", and "Submit". The "View" button is highlighted with a red rectangular box.

2. Click the entries in the Goals section to expand and view the actions associated with each valued outcome.

The screenshot shows a card window titled "[DEFAULT]" with a close button (X) in the top right corner. The card displays "Status: Draft" and "Service Type: ComHab". Below this is a "Download Timesheet" link. A horizontal line separates the top section from the "GOALS" section. Under "GOALS", there are two entries: "Teach skills for independent living" (highlighted with a red box) and "Increase opportunities for community integration, socialization, and fitness".

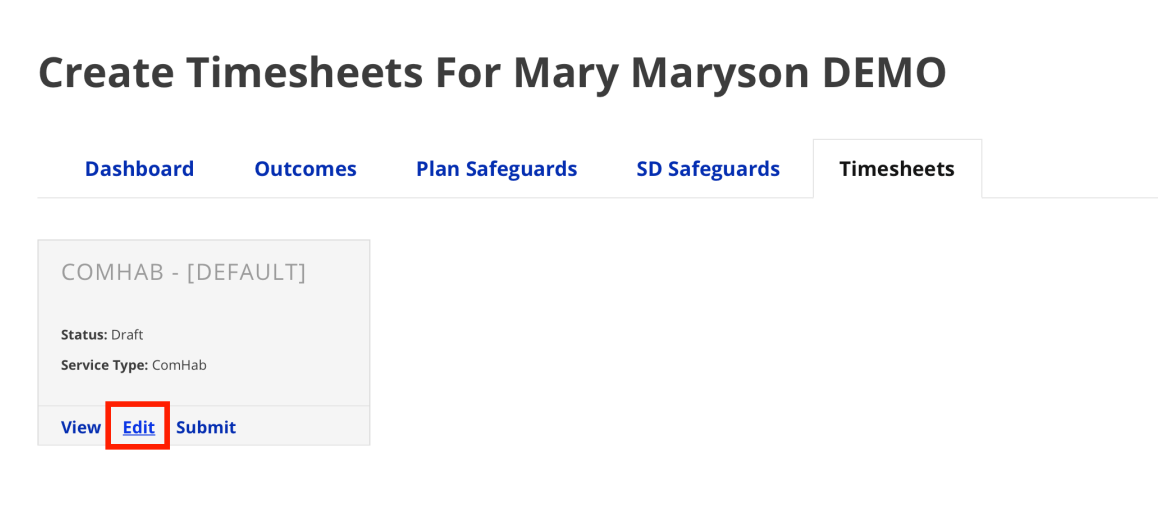
3. Close the card window when done.



# Edit SAP (Broker)

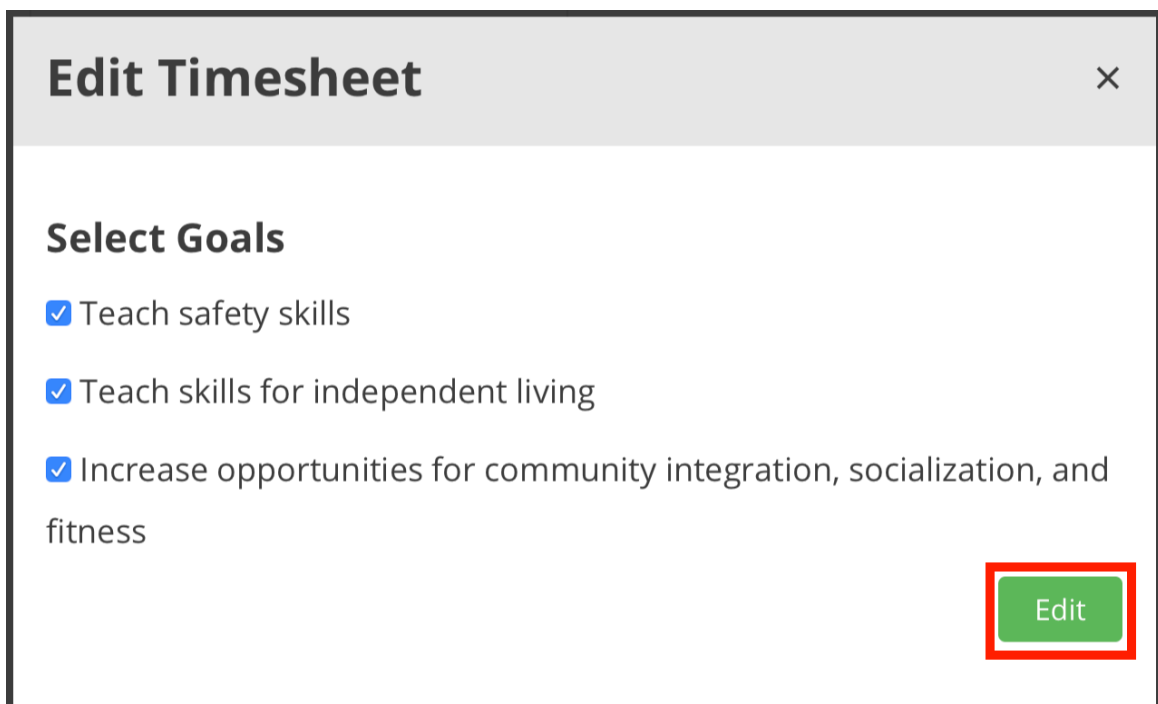
Only Draft timesheets can be edited. To edit a timesheet, follow the steps below.

1. From the timesheets section, click **Edit** on the tile of the timesheet you wish to edit.



The screenshot shows a web interface titled "Create Timesheets For Mary Maryson DEMO". At the top, there are navigation tabs: "Dashboard", "Outcomes", "Plan Safeguards", "SD Safeguards", and "Timesheets". Below the tabs is a card for a timesheet titled "COMHAB - [DEFAULT]". The card displays "Status: Draft" and "Service Type: ComHab". At the bottom of the card, there are three buttons: "View", "Edit", and "Submit". The "Edit" button is highlighted with a red rectangular box.

2. Modify the checkbox selections if necessary to change which goals/outcomes are included on the timesheet.
3. Click **Edit**.



The screenshot shows a dialog box titled "Edit Timesheet" with a close button (X) in the top right corner. Below the title is a section titled "Select Goals" containing three items, each with a checked checkbox: "Teach safety skills", "Teach skills for independent living", and "Increase opportunities for community integration, socialization, and fitness". In the bottom right corner of the dialog, there is a green button labeled "Edit", which is highlighted with a red rectangular box.

4. Expand the attached outcomes to edit the text of the Actions as needed.
5. Click **Save** when done.
6. To navigate back to all timesheets, click **Back to All Timesheets**.

# Submit SAP (Broker)

After the broker has finished creating/editing a timesheet, it must be submitted to the SD Coordinator for approval.

1. From the timesheets section, click **Submit** on the tile of the timesheet you wish to submit.

## Create Timesheets For Mary Maryson DEMO

The screenshot displays a web interface for creating timesheets. At the top, there is a navigation bar with five tabs: 'Dashboard', 'Outcomes', 'Plan Safeguards', 'SD Safeguards', and 'Timesheets'. The 'Timesheets' tab is currently selected. Below the navigation bar, there is a card for a timesheet titled 'COMHAB - [DEFAULT]'. The card shows the following details: 'Status: Draft' and 'Service Type: ComHab'. At the bottom of the card, there are three buttons: 'View', 'Edit', and 'Submit'. The 'Submit' button is highlighted with a red rectangular border.

2. The SD Coordinator will receive an email notification to review the submitted timesheet.

# Retract SAP (Broker)

To retract a submitted timesheet, do the following.

1. From the timesheet section, click Retract on the tile of the timesheet you wish to retract.

## Create Timesheets For Mary Maryson DEMO

[Dashboard](#)

[Outcomes](#)

[Plan Safeguards](#)

[SD Safeguards](#)

[Timesheets](#)

COMHAB - [DEFAULT]

Status: Pending Approval

Service Type: ComHab

[View](#)

[Retract](#)

2. The SD Coordinator will receive an email notification that the timesheet has been retracted. No action needs to be taken by the SD Coordinator.

You can now edit and/or resubmit the timesheet.

# Download SAP

A timesheet can be downloaded anytime after it is created. However, by default, it will be marked with a “Draft” watermark and is not authorized for use. Once a timesheet is approved and has a status of Complete, the watermark is removed and the timesheet is ready to use.

There are three ways to download a timesheet:

- The Edit Timesheet page (Draft timesheets only)
- The View Timesheet window (all statuses)
- Download button (Complete timesheets only)

## Edit Timesheet Page (Draft timesheets only)

1. From the timesheet section, click Edit on the tile of the timesheet you wish to download.

### Create Timesheets For Mary Maryson DEMO

The screenshot shows the SAP Timesheets interface. At the top, there are navigation tabs: Dashboard, Outcomes, Plan Safeguards, SD Safeguards, and Timesheets. The Timesheets tab is active. Below the tabs, there is a card for a timesheet titled 'COMHAB - [DEFAULT]'. The card displays the status 'Status: Draft' and 'Service Type: ComHab'. At the bottom of the card, there are three buttons: View, Edit, and Submit. The 'Edit' button is highlighted with a red square.

2. Click **Edit**.



# Create Timesheets For Mary Maryson DEMO

[Dashboard](#)

[Outcomes](#)

[Plan Safeguards](#)

[SD Safeguards](#)

[Timesheets](#)

COMHAB - [DEFAULT]

Status: Draft

Service Type: ComHab

[View](#) [Edit](#) [Submit](#)

2. Click **Download Timesheet**.

[DEFAULT] ×

**Status:** Pending Approval

**Service Type:** ComHab

[Download Timesheet](#)

GOALS

- ⊕ Teach skills for independent living
- ⊕ Increase opportunities for community integration, socialization, and fitness

## Download button (Completed timesheets only)

1. From the timesheet section, click **Download**.

# Create Timesheets For Mary Maryson DEMO

[Dashboard](#)

[Outcomes](#)

[Plan Safeguards](#)

[SD Safeguards](#)

[Timesheets](#)

COMHAB - [DEFAULT]

Status: Complete

Service Type: ComHab

[View](#) [Download](#)

# Approve SAP (SD Coordinator)

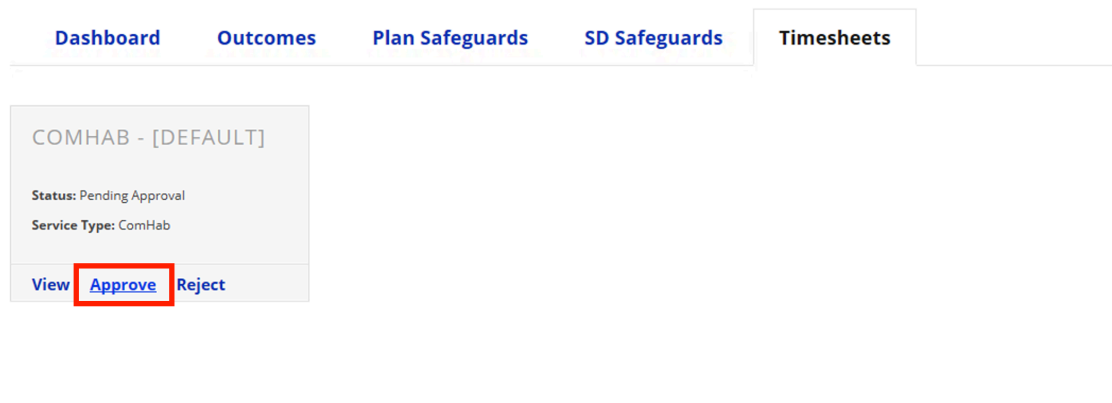
Approving a timesheet sets the status to Complete and removes the watermark, thus authorizing it for use.

To review a timesheet, refer to the VIEW and DOWNLOAD sections of this guide.

The following set of actions must be performed in Harmonix:

1. To begin, navigate to the Participant Detail layout of the participant in question and select the **Plans** tab.
2. From the timesheet section, click **Approve** on the tile of the timesheet you wish to approve.

## Create Timesheets For Mary Maryson DEMO



The screenshot displays a navigation menu with tabs: Dashboard, Outcomes, Plan Safeguards, SD Safeguards, and Timesheets. The 'Timesheets' tab is active. Below the menu, a card for 'COMHAB - [DEFAULT]' is shown. The card contains the following information: Status: Pending Approval, Service Type: ComHab, and a row of action buttons: View, Approve, and Reject. The 'Approve' button is highlighted with a red box.

3. The broker will receive an email notification that the timesheet has been approved and is ready to use.

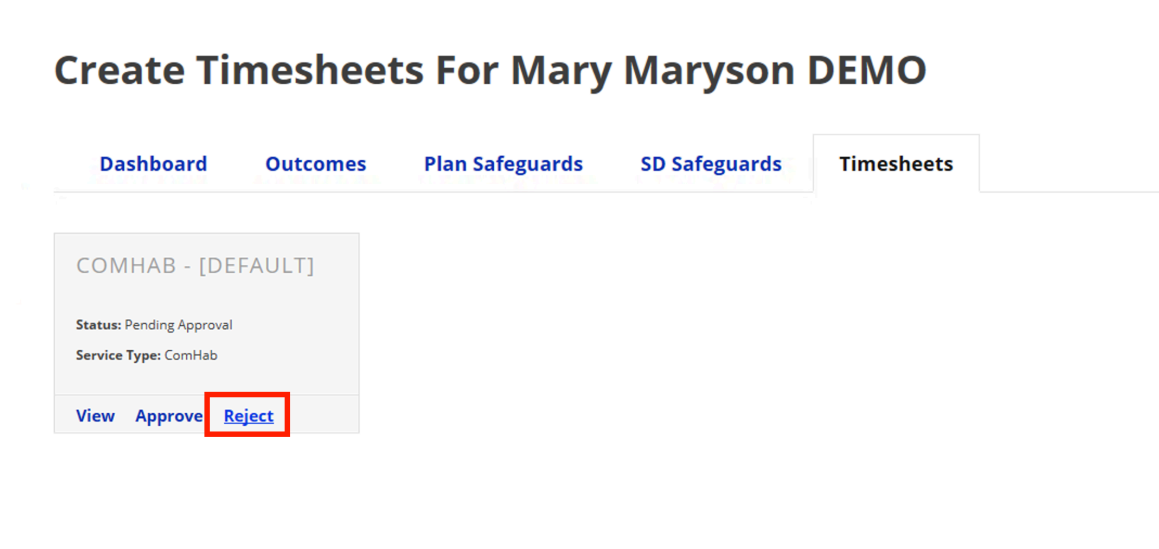
# Reject SAP (SD Coordinator)

Rejecting a timesheet sets the status back to Draft. The broker can then edit the timesheet, make any necessary changes, and resubmit the timesheet.

To review a timesheet, refer to the VIEW and DOWNLOAD sections of this guide.

The following set of actions must be performed in Harmonix:

1. To begin, navigate to the Participant Detail layout of the participant in question and select the **Plans** tab.
2. From the timesheet section, click **Reject** on the tile of the timesheet you wish to decline.



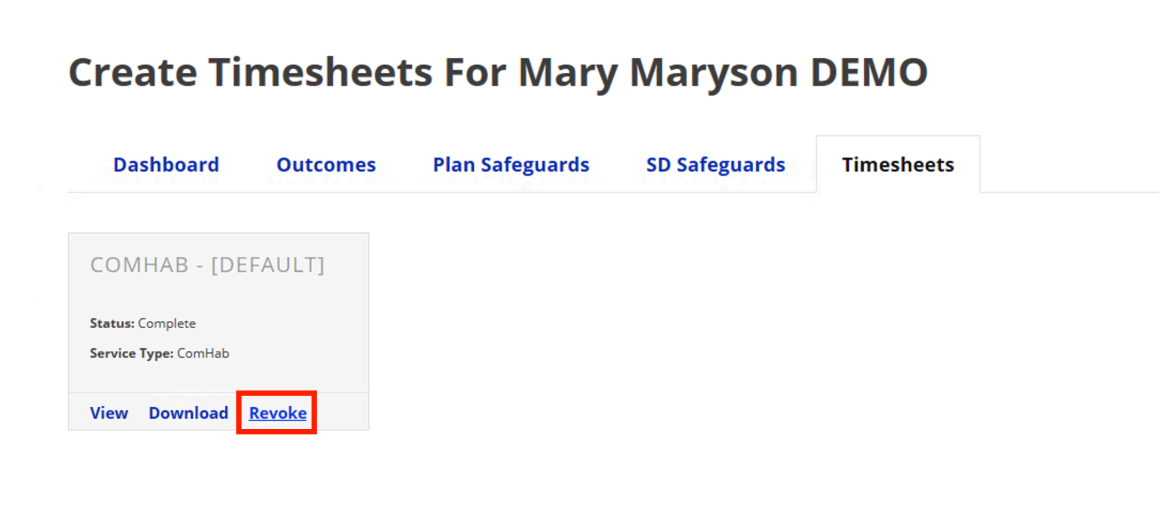
3. The broker will receive an email notification that the timesheet has been rejected. Contact the SD Coordinator for information on why the timesheet was rejected and what needs to change.

# Revoke SAP (SD Coordinator)

Revoking a timesheet changes the status from Complete to Draft, allowing the broker to make changes and resubmit.

The following set of actions must be performed in Harmonix:

1. To begin, navigate to the Participant Detail layout of the participant in question and select the **Plans** tab.
2. From the timesheet section, click **Revoke** on the tile of the timesheet you wish to revoke.



3. The broker will receive an email notification that the timesheet has been revoked. The timesheet is no longer valid to use. Contact the SD Coordinator for information on why the timesheet was revoked.

# Timesheet Statuses

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## Timesheet Statuses

There are five (5) timesheet statuses:

- **Blank** - Status after the Staff Action Plan is approved and the timesheet's Service Type is in the participant's budget, but before the timesheet is created.
- **Not In Budget** - Status if the timesheet's Service Type is NOT in the participant's budget.
- **Draft** - Status after the timesheet is created, but before it has been submitted for approval.
- **Pending Approval** - Status once the timesheet has been submitted for approval.
- **Complete** - Status after the timesheet has been approved.

SAP Timesheets

# Unlock and Download your Timesheets

<https://player.vimeo.com/video/912698322>

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Updated 10/31/25.

# Outcome Combinations

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There are three Service Types (ComHab, Respite and SEMP) and three Outcome Types (Goal, Support and Task), for a total of nine different combinations.

# The Five Possible Timesheet Types

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There are five (5) timesheet types. Every staff position must be on one of these five:

- ComHab - [Default]
- [ComHab - {Special}](#)<sup>2</sup>
- SEMP - Job Coach
- SEMP - Job Developer
- Respite

## Hourly Rates

Hourly rates are NOT associated with individual timesheets. Two staff persons can use the same timesheet and be paid at different rates. It is therefore not necessary to have separate timesheets for different rates for the same position.

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<sup>2</sup>See the "[ComHab - {Special}](#)" page of this guide for details.

## ComHab - [Default] vs. ComHab - {Special}

ComHab - [Default] (CH) is the most common type of ComHab and for most participants, it is the only type of ComHab in the budget. In some cases, a broker may submit a ComHab position in the budget whose role is functionally different than CH. In these cases, ComHab - {Special} (CHS) is used. See the "ComHab - {Special}" section below for more information on CHS timesheets.

## Respite Timesheets

For scenarios in which Respite timesheets are allowed (namely, when Respite is in the participant's budget and at least one non-Task outcome has been created for Respite) the Respite timesheet is automatically created and submitted for approval and will therefore have a status of Pending Approval. Respite timesheets cannot be edited.

SAP Timesheets

# ComHab - {Special}

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## **What is ComHab - {Special} (CHS)?**

While reviewing an approved budget, an SD Coordinator may determine that a functionally different ComHab position was submitted by the broker. In this case, the SD Coordinator will create a job code for "ComHab - {Special}" (CHS). The most common type of CHS is "ComHab - Overnight". While still ComHab, the job itself is functionally different than ComHab - [Default].

## **What do I do if I have a CHS timesheet but only need ComHab - [Default]?**

If a CHS tile appears, but you believe only ComHab - [Default] is needed, contact the SD Coordinator to adjust the job codes accordingly and remove the CHS timesheet.

## **What do I do if I need to create a CHS timesheet but only have ComHab - [Default]?**

If a CHS tile does NOT appear (only ComHab - [Default] appears), but you believe a CHS is needed, contact the SD Coordinator to adjust the job codes accordingly and add a CHS timesheet.

## **What do I do if I need more than one CHS timesheet?**

Only one CHS timesheet is allowed. In the event that there are more than one supplementary ComHab positions (ex. "ComHab - [Default]" AND "ComHab - Overnight" AND an additional CHS), create one CHS timesheet and include the outcomes and support actions for both CHS positions on the single timesheet. The Support Staff using the CHS timesheet will record on the timesheet which of the included outcomes and support actions they complete.

# Outcome Types & Timesheets

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When creating or editing a timesheet, only goals/outcomes for the Service Type of the selected timesheet appear. Additionally, outcomes of type "Task" do not appear. Only outcomes of type "Goal" and "Support" can be added to a timesheet.

# FAQ

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## **Why isn't the timesheet tile I want showing up?**

There are two reasons why a timesheet tile does not show up:

1. An outcome for that Service Type does not exist in the Staff Action Plan, or
2. All outcomes for that Service Type in the Staff Action Plan are of type "Task" and tasks cannot be attached to a timesheet.

## **Why doesn't the Timesheet tab appear? Why is the timesheet button greyed out?**

Possible reasons for this are:

- The Staff Action Plan has not been signed and approved.
- There are no Goal or Support outcomes listed on the Staff Action Plan. Therefore, there are no outcomes to attach to any timesheets.

## **Can I have the same outcome on multiple timesheets?**

Yes. Any outcome can be on any number of different timesheets.