

Budget Summaries

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Introducing the Dynamic Budget Summary

<https://player.vimeo.com/video/1132636557>

Updated 10/31/25.

Housing Subsidy Changes

Effective 11/01/22

The following describes how the budget line of *Housing Subsidy* and the new *Housing* section of the Budget Summary display for participants who have a budget template version "10/01/2022" or later and are approved for a *Housing Subsidy*.

With this budget template version, there are three notable housing implications:

- The limit for rent has been increased.
- A new Housing Admin Fee has been added. OPWDD has defined a set of criteria under which the FI can charge this fee.
- A new adjustment, the Housing Subsidy Payment Standards and Admin Fee Adjustment (HSPSAFA), has been added to offset the cost of the increased rent allowance and Housing Admin Fee.

The result of the greater rent allowance plus the Housing Admin Fee minus the HSPSAFA results in the amount charged to the PRA not exceeding what would have been charged to the PRA in previous budget template versions.

On the Budget Summary for affected participants, starting in the month that the new budget takes effect, the previous budget line, *Housing Subsidy*, under State Funds will be nullified, and four new budget lines will show up under a new subsection called *Housing*. This subsection also has a subsummary line. These four new budget lines and the subsummary are:

- **Rent** (which is the amount we are authorized to pay for the *Housing Subsidy*)
- **HSPSAFA - Rent** (the portion of the HSPSAFA offsetting the increased rent allowance)
- **Fee** (the cost of the new Housing Admin Fee)
- **HSPSAFA - Fee** (the portion of the HSPSAFA offsetting the new Housing Admin Fee)
- **Housing SubSummary from PRA** (the sum of all costs under the *Housing* subsection for a given month that is charged to the PRA)

The Housing Admin Fee will be charged and displayed for each month in which qualifying criteria are met. Select the fee in the Budget Summary to view details on the specific criteria met for a given month.

The HSPSAFA - Fee line will be credited and displayed for each month in which the Housing Admin Fee has been charged.

The HSPSAFA - Rent line will be credited and displayed for each month in which Rent has been charged.

Budget	Amount	3/2022	4/2022	5/2022	6/2022	7/2022	8/2022	9/2022	10/2022	11/2022	12/2022	1/2023	2/2023	Total	Remainder	%
STATE FUNDS																
HOUSING SUBSIDY	\$0.00	\$726.00	\$726.00	\$726.00	\$726.00	\$726.00	\$726.00	\$1,339.00	\$1,339.00					\$7034.00	-\$7034.00	0%
HOUSING																
RENT	\$20,340.00									\$1,695.00	\$1,695.00	\$1,695.00		\$5,085.00	\$15,255.00	75%
HSPSAFA — RENT	-\$4,272.00									-\$356.00	-\$356.00	-\$356.00		-\$1,068.00	-\$3,204.00	75%
FEE	\$2,100.00									\$175.00		\$175.00		\$350.00	\$1,750.00	83%
HSPSAFA — FEE	-\$2,100.00									-\$175.00		-\$175.00		-\$350.00	-\$1,750.00	83%
Housing SubSummary from PRA	\$16,068.00									\$1339.00	\$1339.00	\$1339.00		\$4,015.00	\$12,051.00	75%
OTPS																
PHONE SERVICE - CELL AND/OR LAND LINE	\$140.00	\$10.00	\$10.00	\$10.00	\$10.00		\$20.00	\$10.00	\$10.00					\$80.00	\$60.00	43%
INTERNET	\$480.00	\$53.49	\$53.49	\$53.49	\$53.49		\$112.98	\$59.49	\$59.49					\$445.92	\$34.08	7%
STAFF ACTIVITY FEES	\$17.58			\$17.58										\$17.58	\$0.00	0%
CLOTHING	\$0.00													\$0.00	\$0.00	0%
UTILITIES	\$2,362.42	\$59.13	\$71.40	\$63.92	\$48.13	\$64.71	\$123.89	\$136.44	\$625.94	\$92.30				\$1,285.86	\$1,076.56	46%
OTPS SubSummary	\$3,000.00													\$1,829.36	\$1,170.64	39%
State Distributed	\$19,068.00													\$12,349.36	\$6,718.64	35%

Updated 02/09/23.

11/01/22 Template Housing Training Session

Originally occurred on 2/17/2023

<https://player.vimeo.com/video/799903330?title=0&byline=0>

Examples Used in Presentation:

Example 1 (Timestamp 6:58):

Budget	Amount	3/2022	4/2022	5/2022	6/2022	7/2022	8/2022	9/2022	10/2022	11/2022	12/2022	1/2023	2/2023	Total	Remainder	%
STATE FUNDS																
HOUSING SUBSIDY	\$0.00	\$726.00	\$726.00	\$726.00	\$726.00	\$726.00	\$726.00	\$1,339.00	\$1,339.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7034.00	\$-7,034.00	0%
HOUSING																
RENT	\$20,340.00									\$1,695.00	\$1,695.00	\$1,695.00	\$1,695.00	\$6780.00	\$13,560.00	67%
HSPSAFA - RENT	\$-4,272.00									\$-356.00	\$-356.00	\$-356.00	\$-356.00	\$-1424.00	\$-2,848.00	67%
FEE	\$2,100.00									\$175.00	\$175.00			\$350.00	\$1,750.00	83%
HSPSAFA - FEE	\$-2,100.00									\$-175.00	\$-175.00			\$-350.00	\$-1,750.00	83%
Housing SubSummary from PRA	\$16,068.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$5356.00	\$10,712.00	67%
Subsidy Calculation:																
Total Housing Subsidy Requested	\$									\$10.00	\$10.00	\$10.00		\$100.00	\$40.00	29%
Gross Housing Contribution	\$									\$59.49		\$34.08		\$480.00	\$0.00	0%
Utility/Insurance Offset	\$													\$17.58	\$0.00	0%
Net Housing Contribution	\$													\$0.00	\$0.00	0%
Calculated Maximum Monthly Housing Subsidy										\$625.94	\$92.30	\$603.76	\$101.43	\$1991.05	\$371.37	16%
Allowed	\$													\$2,588.63	\$411.37	14%
Supplement to Calculated Housing Subsidy	\$													\$14,978.63	\$4,089.37	21%
Total DDRO Allowed Subsidy Including Supplement	\$															
Monthly Subsidy to be Paid	\$															
Administration	\$															
Annual Subsidy to be Paid w/ Admin	\$															
Budget Summary																
Medicaid Funded Self-Directed Services:														\$85,049.88		
Agency Supported Self-Directed Services:														\$0.00		
100% State Funded Self-Directed Services:														\$25,440.00		
Direct Provider Purchased Services:														\$0.00		
Contracted Services:														\$0.00		
2022 Housing Subsidy Payment Standards and Admin Fee Adjustme														(\$6,372.00)		

Example 2 (Timestamp 11:25):

Budget	Amount	9/2022	10/2022	11/2022	12/2022	1/2023	2/2023	3/2023	4/2023	5/2023	6/2023	7/2023	8/2023	Total	Remainder	%
STATE FUNDS																
HOUSING SUBSIDY	\$0.00	\$634.00	\$634.00	\$634.00	\$0.00	\$0.00	\$0.00							\$1902.00	\$-1,902.00	0%
HOUSING																
RENT	\$9,804.00				\$817.00	\$817.00	\$817.00	\$817.00						\$3268.00	\$6,536.00	67%
HPSAFA - RENT	\$-768.00				\$-64.00	\$-64.00	\$-64.00	\$-64.00						\$-256.00	\$-512.00	67%
FEE	\$2,100.00				\$175.00									\$175.00	\$1,925.00	92%
HPSAFA - FEE	\$-2,100.00				\$-175.00									\$-175.00	\$-1,925.00	92%
Housing SubSummary from PRA	\$9,036.00	\$0.00	\$0.00	\$0.00	\$753.00	\$753.00	\$753.00	\$753.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3012.00	\$6,024.00	67%
Subsidy Calculation:																
Total Housing Subsidy Requested	\$													\$320.00	\$400.00	56%
Gross Housing Contribution	\$													\$354.97	\$725.03	67%
Utility/Insurance Offset	\$													\$0.00	\$0.00	0%
Net Housing Contribution	\$													\$0.00	\$0.00	0%
Calculated Maximum Monthly Housing Subsidy Allowed	\$													\$335.92	\$864.08	72%
Supplement to Calculated Housing Subsidy	\$													\$1,010.89	\$1,989.11	66%
Total DDRO Allowed Subsidy Including Supplement	\$													\$5,924.89	\$6,111.11	51%
Monthly Subsidy to be Paid	\$															
Administration	\$															
Annual Subsidy to be Paid w/ Admin	\$															11,904
Medicaid Funded Self-Directed Services:																\$84,348.00
Agency Supported Self-Directed Services:																\$0.00
100% State Funded Self-Directed Services:																\$14,904.00
Direct Provider Purchased Services:																\$0.00
Contracted Services:																\$0.00
2022 Housing Subsidy Payment Standards and Admin Fee Adjustmen																(\$2,868.00)

Chat Log:



Anything in the chat log was part of the conversation had during the meeting. To ensure you get the most up to date and accurate information, please reach out to your Self-Direction Coordinator.

10:14:19 From myra : where is the non-pra money coming from?

10:16:59 From stephh ramunto : Does this raise in the rent money come from the updated budget? Or is it the new max for all participants

10:19:56 From Carolyn Wember : Will the non-PRA funds be added to people's housing budgets every year, going forward? Or is this just a one-time "gift" from NYS?

10:22:56 From Kathleen Marafino : Will the slides be available to us?

10:23:22 From Jon Rosenfeld : what is the maximum amount you Queens ?

10:23:41 From John Innis : In this example, the 64 is the diff b/t new & old max subsidy?

10:23:55 From doreenjohann : When will these new amounts to housing subsidies be implemented into existing budgets?

10:23:56 From Gage Mags to SDC Department Zoom(Direct Message) : I have it

10:24:27 From Gage Mags : max for queens is 2054 for a one bedroom

10:24:29 From valerie declara : Will these lines auto caculate as we enter info ?

10:24:36 From Donna Austin : where can I get the budget template?

10:24:44 From Gage Mags : i have the new housing subside in front of me

10:24:46 From Amy Beyer : What is the new maximum for 3 persons living together?

10:24:47 From Gage Mags : lol

10:24:53 From Caryn Reid : Do we send them to REVIEW?

10:25:28 From Gage Mags : amy to my knowledge that depends who is on the lease, i can't know better than that, my apologies.

10:25:34 From John O'Sullivan : It auto populates

10:25:36 From Kim Warga : Replying to "where can I get the ..."Please request a fresh, blank template for your SD liaison.

10:25:59 From Trish Calandra : \$2642

10:26:01 From Amy Beyer : Yes along Island. Thanks

10:26:04 From Gage Mags : the screenshare is using Suffolk county numbers
10:26:19 From HPF-ADMIN : How long is it currently taking for ISS to review a full budget review with housing and how long for OPWDD to review?
10:26:56 From Gage Mags : which ones are taking a week?
10:27:42 From michael b : how long does a rent increase take to process ?
10:27:46 From Alan sobel :
10:28:00 From Roger McCaffrey : Replying to "What is the new maxi..." Remember that its no always the # of person, if 3 persons live in a 2BR apt, the subsidy will be based on the 2BR standard, but it will be divided by 3
10:28:10 From myra : if the HUD rates increase, will the housing rates in sd increase?
10:28:15 From Judith Gleason : How does the family hold the apartment while waiting for approval?
10:28:24 From Chantel Paige : What is the maximum for a one bedroom in Hudson Valley?
10:28:30 From Carolyn Wember : Any experience with Brooklyn DDRO yet?
10:28:35 From Kelsey Mowery : Is active ssi for housing subsidy
10:28:58 From Chantel Paige : Reacted to "How does the family ..." with
10:29:15 From Chaunikah Atkins : Where can we get the rent amounts per County?
10:29:21 From Cindy Godoy : is what ISS receives based on how many of these items they did?
10:29:40 From Jeanne Johnson : Replying to "how long does a rent..."It can depend information provided and requested back by each DDRO
10:29:46 From Susan Platkin : Is the list of FI responsibilities available online?If not can you send it.
10:29:46 From regina santo : does admin fee get approved by participant/broker?
10:30:58 From Gage Mags : lol i have that too
10:31:03 From Roger McCaffrey : Any comment on this 30-day "hold" period when a housing subsidy is decreased?
10:31:22 From Kelsey Mowery : Do you lose your housing subsidy if there is an interruption in ssi
10:31:38 From Gage Mags : i havbe that list
10:31:46 From Trish Calandra : https://www.huduser.gov/portal/datasets/fmr/fmrs/FY2022_code/select_Geography.odn
10:31:49 From Gage Mags : it super exists
10:32:03 From Trish Calandra : This is the quarry form for HUD FMR
10:32:07 From Jeanne Johnson : Replying to "is what ISS receives..." It is a monthly rate not per item
10:32:10 From Trish Calandra : Querry
10:32:19 From Linda Askenazi : Can you change apartments if you already have a subsidy and not wait?
10:33:26 From Chantel Paige : Replying to "https://www.huduser...." Thank you Trish!!!
10:33:28 From JR : Replying to "https://www.huduser...." very useful. thanks
10:34:10 From Nicole : The list of tasks on the screen are mostly done by the brokers but payment is being sent to the FIs. Will that money be passed along to the us in anyway since we are providing the service?
10:34:25 From Judith Gleason : When does the FI send transition \$\$?. Is it only used as a reimbursement after the individual is in the apartment?
10:35:29 From Victor LaPoma : Can you explain what your going to do with the first and last item on your list? Prepare QA Cklist? Help person find an apartment?
10:36:08 From Helene Just : What is the amount of the transition stipen?
10:36:22 From Jeanne Johnson : Replying to "When does the FI sen..." It is based on the date of move
10:36:23 From Kim Warga : Replying to "What is the amount o..." \$3,000
10:36:25 From valerie declara : No concern if broker and fi do same actions?
10:37:00 From valerie declara : Not duplication of service?
10:37:01 From Cindy Godoy : So the individual can request that ISS assist with these tasks
10:37:10 From regina santo : so we should contact fi with issues regrading housing ie landlord issues, appropriate payments for services?
10:37:39 From Helene Just : What if your wages fluctuate and money goes up and down?
10:38:53 From Susan Platkin : This is a very broad list. Is ISS planning to actually assist people with identifying and choosing a housing unit?
10:39:33 From Susan Platkin : Maybe something for the future, when families are no longer around
10:39:38 From Gage Mags : 🙄
10:39:57 From Susan Platkin : Understood, thanks
10:40:00 From Jeanne Johnson to SDC Department Zoom(Direct Message) : maybe mention Housing Navigation

10:40:21 From Karen : What services on this list does ISS plan on being responsible for?

10:40:27 From Gage Mags : may i unmute my microphone to ask my question?

10:40:53 From Melinda Mercado : Not so much

10:40:55 From Roger McCaffrey : Thoughts on funding housing nav, thru the SD budget?

10:41:17 From SPANISH ISAAC ASKENAZI : What's the maximum for a studio in Westchester

10:41:25 From michael b : is it a full budget amendment when there is a rent increase?

10:41:30 From Victor LaPoma : Yes, Thank you for the presentation!

10:41:52 From Trish Calandra : Housing navigators are not RE agents tho everyone, we can help you find links and contacts but we do not have apartments/houses lined up just to clarify We help provide education and sustainable long term planning

10:42:08 From Cynthia Alcozer, ACMENY : Reacted to "Housing navigators a..." with

10:42:24 From doreenjohann : What is the maximum housing subsidy for two bedroom apartment?

10:42:29 From Chantel Paige : Reacted to "Housing navigators a..." with

10:42:46 From Jeanne Johnson : Replying to "Thoughts on funding ..." OTPS - unless the navigator is a broker or staff person with the individual

10:42:56 From Dawn Tortora-Morici : Very informative presentation. Thank you!

10:43:29 From regina santo : think im feeling a little uncomfortable with billing off my budget without knowing what service was provided we are used to having close scrutiny with billing services

10:43:37 From Jeanne Johnson : Replying to "Housing navigators a..." Thank you Trish

10:43:41 From Trish Calandra : Yes we need advocacy and more parents need to get involved

10:43:42 From valerie declara : SANYS

10:43:51 From leslie feinberg : Reacted to "Yes we need advocacy..." with

10:44:19 From Roger McCaffrey : Replying to "What is the maximum ..." For Nass/Suff it is \$2,065

10:44:27 From Charles Jackson : NY Alliance can push for legislators to consider Gage's question

10:44:32 From Jeanne Johnson : Replying to "What is the maximum ..." https://www.huduser.gov/portal/datasets/fmr/fmrs/FY2022_code/select_Geography.odn

10:44:42 From valerie declara : SO TRUE about the most calls but that needs to be families and parents—elected officials listed (a bit) to people more not agencies

10:44:44 From Trish Calandra : Not the FI that is the only advocate, we need more families and yes join SANYS and NY Alliance, SOYAN

10:44:57 From leslie feinberg : Reacted to "Not the FI that is t..." with

10:45:03 From valerie declara : We as families should advocate more

10:45:18 From Jeanne Johnson : Replying to "think im feeling a l..." This is not coming from the PRA budget funds - it is a separate funding source

10:45:37 From Karen : Reacted to "Not the FI that is t..." with

10:46:39 From Cynthia Alcozer, ACMENY : Is the adm fee non PRA fund affiliated to the CIN number in any type or form?

10:46:44 From Carolyn Wember : Housing Navigation absolutely needs to be added as a separate SD service.

10:46:53 From Cynthia Alcozer, ACMENY : Reacted to "Housing Navigation a..." with

10:47:06 From Jeanne Johnson to SDC Department Zoom(Direct Message) : JR is also raising his had

10:47:16 From leslie feinberg : Reacted to "Housing Navigation a..." with

10:47:22 From SPANISH ISAAC ASKENAZI : What is the maximum for a studio in Westchester

10:47:29 From HPF-ADMIN : Do you know of any centralized entity where we can post a need for a housing partnership / room mate.

10:47:46 From JR to SDC Department Zoom(Direct Message) : Question

10:47:53 From Jeanne Johnson : Replying to "What is the maximum ..." The HUD subsidy webpage - https://www.huduser.gov/portal/datasets/fmr/fmrs/FY2022_code/select_Geography.odn

10:49:23 From Jeanne Johnson : Replying to "Do you know of any c..." Not at this time.

10:49:24 From Gage Mags : Max for studio/one bedroom in Westchester is 1566 a month.

10:52:40 From Edna : To the 29 year old Gentleman who struggling with Apt Re; appropriate living arrangements, perhaps try submitting a Petition to local Counsel Persons, Legislators and Congress. Don't give up the fight and good luck.

10:52:41 From Trish Calandra : <https://nyhrc.org> Great information here too

10:53:09 From Christina Forseth : Can you elaborate on the role of a housing navigator? Are they paid through the budget? Thank you

10:53:19 From Charles Jackson : Send me questions to address to the NY Alliance, as I sit on their Policy

& Review committee cjackson@issny.org

10:53:23 From Gage Mags : giving up the fight means i don't have a place to live, I'm here for the long haul to be sure. thank you all for your support.

10:53:36 From leslie feinberg : Reacted to "Send me questions to..." with

10:54:09 From JR : Replying to "Send me questions to..." thanks "Charles " ?

10:54:26 From Gage Mags : If I man, here is a link to a little known resource you all may benefit from knowing about. It helped me save for a future without jeopardizing my services, It's called an ABLE Account. <https://www.mynyable.org/>

10:54:35 From leslie feinberg : OPWDD does not advocate! We do! SOYAN.ORG

10:55:07 From Carolyn Wember : Reacted to "OPWDD does not advoc..." with

10:55:30 From Envisioned Lives : Reacted to "OPWDD does not advoc..." with

10:55:33 From Trish Calandra : As a Housing Navigator (HN) our role is to assist and guide participants, families and the professionals involved create a long-term sustainable housing plan. This can include education and implementation of entitlements, OPWDD services and regulations, shared and independent living.

While HN's may become aware of affordable opportunities our role is not that of Real Estate persons in locating an apartment or securing housing. For the LI Region below are affordable and educational resources for housing: Long Island Housing Partnership: <http://www.lihp.org>, Community Development Corporation of LI (CDCLI) : <https://www.cdcli.org>, Suffolk County Housing Authority Agencies: <https://www.affordablehousing.com/housing-authority-suffolk-county-ny/>, Nassau County Housing Authority Agencies: <https://www.affordablehousing.com/housing-authority-nassau-county-ny/>

10:55:54 From denise horsford : Amen to the last parent's comments!

10:55:57 From doreenjohann : Where will the recording of this meeting be posted?

10:57:01 From leslie feinberg : Reacted to "If I man, here is a ..." with

10:57:34 From Christina Forseth : Reacted to "As a Housing Navig..." with

10:57:41 From regina santo : great information thanks for sharing!!

10:58:22 From Carolyn Wember : The ABLE National Resource Center is a great resource for ABLE accounts.

10:58:22 From Envisioned Lives : Tap into your Care Manager or their supervisor for assistance with the able account

10:58:30 From Lisa Krebs Borgen : Agreed that we all have to advocate together. There is strength in numbers. There is feedback for a housing issue that is due by the end of next week. Strongly recommend sending in your opinion. Trish or Leslie, do you have a place for people to get info?

10:58:37 From HPF-ADMIN : PS you can change a 529 college plan to an able account

10:59:00 From Susan Platkin : This was excellent, thanks very much!

10:59:07 From Gage Mags : oh no

10:59:20 From Roger McCaffrey : Thanks to everyone at ISS...

10:59:45 From John Innis : Thanks, all.

10:59:48 From Lisa Krebs Borgen : Thanks so much Mary!

10:59:54 From Trisha Davison : thank you so much for this!!!! Have a great weekend.

11:00:03 From Donna Febo : Thank you ISS Team. Thank you Mary!

11:00:24 From leslie feinberg : Thanks Mary and ISS for sharing this info and hosting this info session

11:00:26 From bree dj : Thank You !!

11:00:31 From Envisioned Lives : This was a great information session. I have to excuse myself at this time. Thank you

11:00:49 From bree dj : Thank You Mary!

11:00:56 From Carolyn Wember : Thanks for doing this, Mary -- much appreciated!

11:01:35 From Broker Zoom : thank you Mary, great job!

11:01:43 From leslie feinberg : @Lisa Krebs Borgen...SOYAN is working on a FOFILLS response...and hope to collaborate with Trish soon

11:02:09 From T M : What about queens??

11:02:39 From Trish Calandra : Thank you all at ISS, this is so helpful

11:02:47 From Donna Ehrenberg : thank you

11:02:53 From Jeanne Johnson to SDC Department Zoom(Direct Message) : Affordable housing link - <https://hcr.ny.gov/find-affordable-housing>

11:03:00 From Dawn Tortora-Morici : Thank you!

11:03:11 From Melinda Mercado : Thank you

11:03:19 From Judith Gleason : Thank You!!
11:04:14 From Deepak Trivedi : Thank You !!
11:04:31 From Zoom user : Thank you!
11:04:33 From Zoom user : Thank you

Participant Portal v1.1 - Web Budget Summaries Quick Start Guide

Created 5/11/2018

Introduction

Welcome to Participant Portal v1.1 with new web-based Budget Summaries!

Highlights of what's new:

- Summaries are now updated nightly. There is no need to wait until Monday for a new summary.
- Amounts on the summary are accurate as of our most recent processing runs and unprocessed bills and staff time may not be reflected
- It's now easy to pick a summary and download it by budget year.
- The stop and start dates of plans within a budget year are clearly indicated by different color blocks for easy viewing, so you can see exactly when a new budget took effect.
- Overages are highlighted for easy identification with a red box

View All Budget Summaries

On the portal dashboard for the participant, click the *View Summaries* button:



Help



Dashboard for



PLAN FOR

Plan Amount:

Plan Date:

SD Coordinator:

● View My Plan

● View Summaries

● Hab Plan

● Contacts

RECENT TIMESHEETS

Mar 5, 2018 - Mar 18, 2018

Status: Approved Support Staff:

Position: Hours: 40

View

Mar 5, 2018 - Mar 18, 2018

Status: Approved Support Staff:

Position: Hours: 20

View

Mar 5, 2018 - Mar 18, 2018

Status: Approved Support Staff:

Position: Hours: 44

View

[VIEW ALL TIMESHEETS »](#)

RECENT DOCUMENTS

ScannedImage_127448.jpg

Status: New

Description: Monthly Expense for Effective Date

Download

ScannedImage_94948.jpg

Status: Last Viewed: 04/01/2018 00:26:16

Description: Expense Support Document for Effective Date

Download

ScannedImage_94947.jpg

Status: Last Viewed: 04/01/2018 00:26:34

Description: Expense Support Document for Effective Date

Download

[VIEW ALL DOCUMENTS »](#)

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ISS INDEPENDENT
SUPPORT SERVICES INC.
Make your Own Path

Download by Budget Year

Choose which summary to download:



Welcome to the new Dynamic Budget Summaries!

What's New?

- Summaries are now updated nightly. There is no need to wait until Monday for a new summary.
- Amounts on the summary are accurate as of our most recent processing runs and unprocessed bills and staff time may not be reflected.
- It's now easy to pick a summary and download it, by budget year.
- The stop and start dates of plans within a budget year are clearly indicated by different color blocks for easy viewing, so you can see exactly when a new budget took effect.
- Overages are highlighted for easy identification with a red box.

For more detailed instruction, download the [Quick Start Guide](#).

06/01/2017 - 05/31/2018 [Download PDF](#)

06/01/2016 - 05/31/2017 [Download PDF](#)

10/01/2015 - 05/31/2016 [Download PDF](#)

10/01/2014 - 09/30/2015 [Download PDF](#)

- Click *Download PDF* for the summary you want.
- The Budget Summary will open in a new tab of your browser, where you can use the browser controls to scroll, zoom, or print the summary.
- Note that the PDF will be 2 pages long, with Medicaid budget lines on page 1 and State budget lines on page 2.

Multiple Budget Years

Color coding is now used to indicate when a budget was amended. The original budget's months are displayed with a white background. Subsequent amended budget months are displayed using different colors, for easy identification of when one budget ended and another began:

Choose a fiscal year: 04/01/2017 - 03/31/2018

Now viewing all plans for 4/1/2017 - 3/31/2018

■ 4/2017 ■ 9/2017 ■ 10/2017 ■ 12/2017 ■ 1/2018

Budget	Amount	4/2017	5/2017	6/2017	7/2017	8/2017	9/2017	10/2017	11/2017	12/2017	1/2018	2/2018	3/2018	Total	Remainder	%
Medicaid Funds																
Self Hired Staff																
ComHab	\$43,056.88	\$632.48	\$682.07	\$678.04	\$966.98	\$1,310.52	\$1,484.72	\$2,780.17	\$2,425.11	\$1,803.00	\$2,533.97	\$2,649.55	\$2,689.28	\$20,635.89	\$22,420.99	52%
Brokerage	\$3,000.00		\$240.00	\$480.00	\$80.00		\$110.00	\$330.00	\$120.00	\$180.00	\$130.00	\$90.00		\$1,760.00	\$1,240.00	41%
IDGS																
Community Classes	\$16,857.00	\$480.00	\$540.00	\$540.00	\$480.00	\$600.00	\$480.00	\$480.00	\$600.00	\$480.00	\$540.00	\$480.00	\$480.00	\$6,180.00	\$10,677.00	63%
Coaching / Education for Advocates	\$500.00													\$0.00	\$500.00	100%
Memberships	\$1,500.00													\$0.00	\$1,500.00	100%
Transportation	\$2,053.00	\$140.84	\$41.20	\$74.15	\$88.66	\$67.95	\$38.53	\$335.53	\$128.97	\$172.32	\$200.12	\$107.93	\$131.90	\$1,528.10	\$524.90	26%
Direct Purchase																
Community Habilitation	\$39,000.00													\$0.00	\$39,000.00	100%
Pre Vocation	\$0.00													\$0.00	\$0.00	0%
ISS Distributed	\$105,966.88													\$30,103.99	\$75,862.89	72%

A legend in the upper right-hand corner displays the start date of the new budget (for example, the pink months indicate a budget that started 10/1/2017):



MedicaidCIN: | *Last Updated: 05/08/2018

Now viewing all plans for 4/1/2017 - 3/31/2018

■ 4/2017 ■ 9/2017 ■ 10/2017 ■ 12/2017 ■ 1/2018

Budget	Amount	4/2017	5/2017	6/2017	7/2017	8/2017	9/2017	10/2017	11/2017	12/2017	1/2018	2/2018	3/2018	Total	Remainder	%
Medicaid Funds																
Self Hired Staff																
ComHab	\$43,056.88	\$632.48	\$682.07	\$678.04	\$966.98	\$1,310.52	\$1,484.72	\$2,780.17	\$2,425.11	\$1,803.00	\$2,533.97	\$2,649.55	\$1,641.17	\$19,587.78	\$23,469.10	55%
Brokerage	\$3,000.00		\$240.00	\$480.00	\$80.00		\$110.00	\$330.00	\$120.00	\$180.00	\$130.00			\$1,670.00	\$1,330.00	44%
IDGS																
Community Classes	\$16,857.00	\$480.00	\$540.00	\$540.00	\$480.00	\$600.00	\$480.00	\$480.00	\$600.00	\$480.00	\$540.00			\$5,220.00	\$11,637.00	69%
Coaching / Education for Advocates	\$500.00													\$0.00	\$500.00	100%
Memberships	\$1,500.00													\$0.00	\$1,500.00	100%
Transportation	\$2,053.00	\$140.84	\$41.20	\$74.15	\$88.66	\$67.95	\$38.53	\$335.53	\$128.97	\$172.32	\$200.12	\$107.93		\$1,396.20	\$656.80	32%
Direct Purchase																
Community Habilitation	\$39,000.00													\$0.00	\$39,000.00	100%
Pre Vocation	\$0.00													\$0.00	\$0.00	0%
ISS Distributed	\$105,966.88													\$27,873.98	\$78,092.90	74%

- Note the date this was last updated also appears in the upper right-hand corner -- in this case, May 8, 2018.

Budget Funding Start & End Within A Plan

A gray hash is used to indicate when a budget line was ended:



Overspent Budget Lines

Budget lines that are overspent are surrounded by a red line for easy identification:

Budget	Amount	2/2017	3/2017	4/2017	5/2017	6/2017	7/2017	8/2017	9/2017	10/2017	11/2017	12/2017	1/2018	Total	Remainder	%
State Funds																
Housing Subsidy	\$16,068.00		\$3,104.95	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$1,339.00	\$16,494.95	\$-426.95	-3%
Housing Transition	\$4,639.00	\$139.00	\$1,866.45	\$567.60										\$2,573.05	\$2,065.95	45%

IRA

If your participant lives in an IRA, the related budget lines and applicable months will have a red triangle at the top, and the start date will be indicated with a thick red vertical line:

IDGS																	
Community Classes	\$3,000.00														\$0.00	\$3,000.00	100%
Memberships	\$360.00				\$18.38	\$18.38	\$18.38	\$18.38	\$18.38	\$18.38	\$18.38	\$18.38	\$18.38	\$147.04	\$212.96	59%	
Transportation	\$1,694.50				\$108.07	\$125.56	\$158.99	\$58.79	\$155.43	\$140.49	\$163.84	\$158.24		\$1,069.41	\$625.09	37%	

Exceptions & Hospital Stays

A hospital stay is indicated with a red hash and the start date will be indicated with thick red vertical lines:

Budget	Amount	2/2016	3/2016	4/2016	5/2016	6/2016	7/2016	8/2016	9/2016	10/2016	11/2016	12/2016
Medicaid Funds												
Self Hired Staff												
ComHab	\$86,458.94	\$5,644.67	\$6,791.22	\$6,081.41	\$7,330.08	\$5,863.46	\$6,315.14	\$6,558.99	\$2,236.66	\$2,454.06	\$9,527.44	\$10,139.97
SEMP	\$7,580.16										\$44.22	
Brokerage	\$1,960.00	\$80.00	\$120.00	\$120.00	\$140.00	\$140.00	\$180.00	\$320.00		\$280.00	\$160.00	\$160.00

- This exception example also illustrates budget dollars spent during the hospitalization

Inactive Status

When a participant becomes inactive / terminates from the program, a solid gray bar is used to indicate the date the inactivation was effective:

Budget	Amount	8/2017	9/2017	10/2017	11/2017	12/2017	1/2018	2/2018	3/2018	4/2018	5/2018	6/2018	7/2018	Total
Medicaid Funds														
Self Hired Staff														
ComHab	\$27,872.00													\$0.00
Brokerage	\$3,000.00	\$160.00	\$240.00	\$240.00	\$160.00	\$200.00	\$120.00							\$1,120.00

Conclusion

The new web-based Budget Summaries are easy to use and are more accurate since they reflect more recent processing. Furthermore, they clearly show funding consumed by budget year.

Still Need Help?

If you still have questions, please reach out to your Self Direction Coordinator. If you are experiencing problems with the website, please email websupport@issny.org.