

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.
Member Since 1978

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	\$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	95%
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	\$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	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	%
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	\$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.

🔄Revision #3

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