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) directly.

Thank you so much!

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