

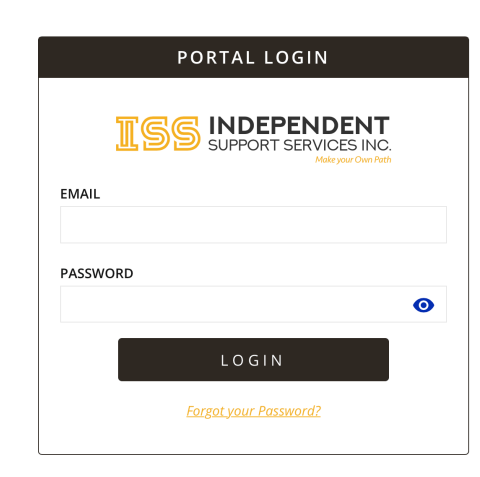
Portal Quick Start Guide

Log in URL: <https://portal.issny.org>

- To log into the portal, navigate with your computer or mobile device browser to <https://portal.issny.org>

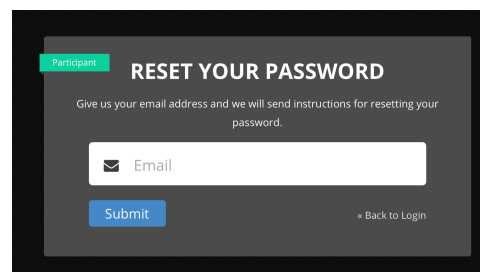
Username & Password:

- Your login credentials have been carried forward from the old ISS Participant Portal. Enter them and click the “Login” button.



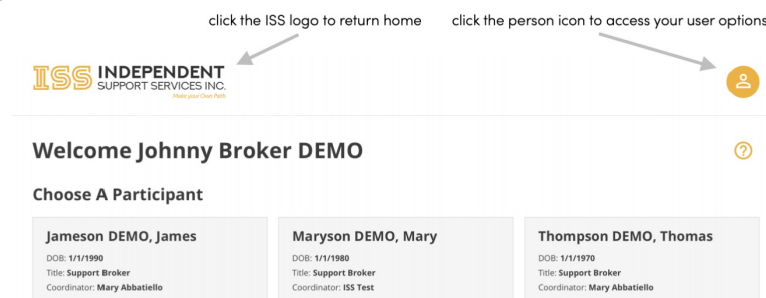
Forgot your password:

- If you've forgotten your login credentials, simply click the “Forgot your Password?” link on the login screen. Clicking this link will take you to the following page. Enter your email address, press submit, and you will be sent a password reset link.



Your new Portal Home:

- Once logged in you will be taken to your new Portal Home. Here you can select a participant by clicking on the participant's name. You can always return to this page by clicking the ISS icon in the upper left hand corner or by clicking the person button in the upper right hand corner and selecting home. Additional future options are planned for this page.



click the ISS logo to return home click the person icon to access your user options

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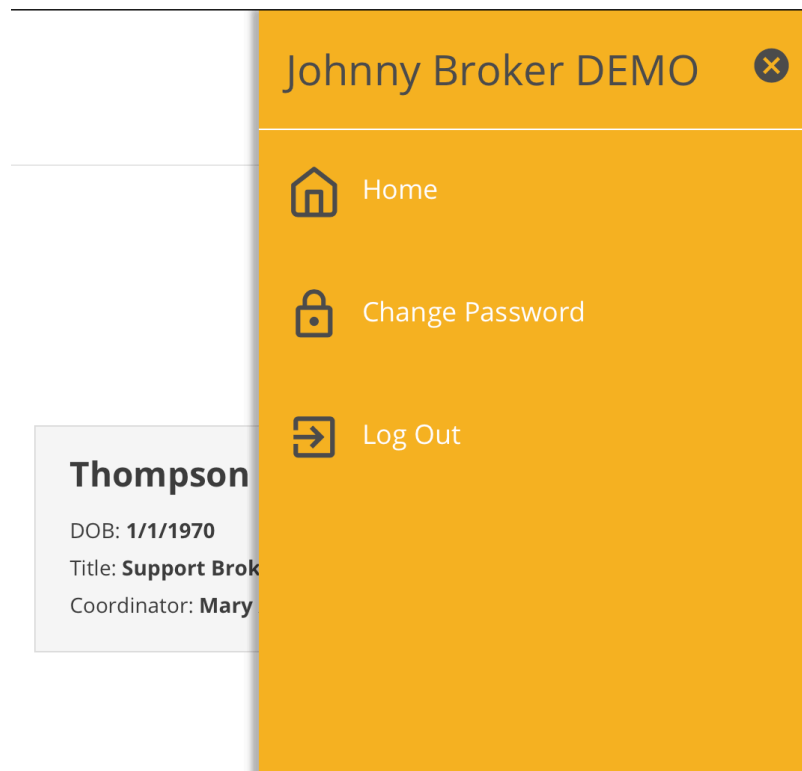
Welcome Johnny Broker DEMO

Choose A Participant

Jameson DEMO, James	Maryson DEMO, Mary	Thompson DEMO, Thomas
DOB: 1/1/1990	DOB: 1/1/1980	DOB: 1/1/1970
Title: Support Broker	Title: Support Broker	Title: Support Broker
Coordinator: Mary Abbatiello	Coordinator: ISS Test	Coordinator: Mary Abbatiello

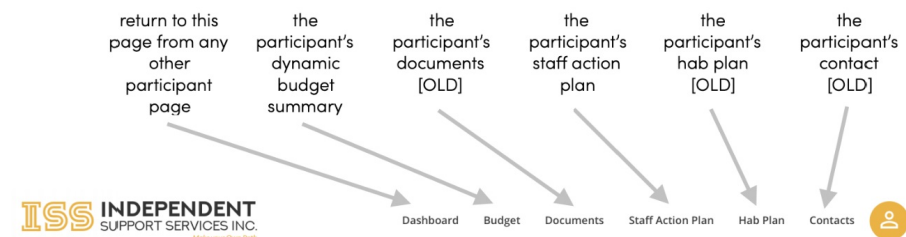
The Person button:

- Clicking the person icon (from any page will expose the user options panel shown on the right. From here you currently have three options:
 - **Home:** will return you to the home screen
 - **Change Password:** will allow you to change your password
 - **Log Out:** will log you out of the Portal

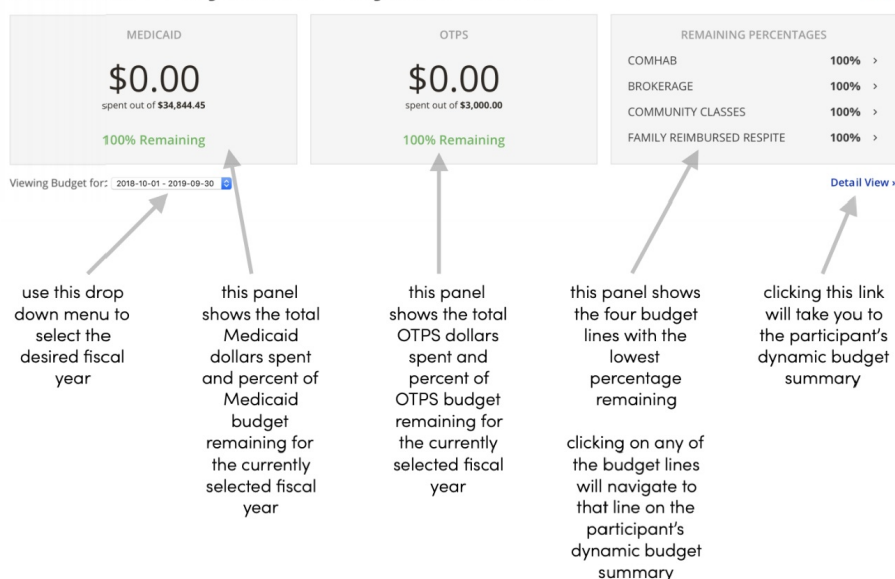


Your new Participant Dashboard:

- Selecting a participant from the home screen will take you to the Participant Dashboard. Once you've selected a specific participant, all links relate to that participant. The current participant dashboard view provides a quick preview of the selected fiscal year's budget. Additional future dashboard options will be added below the budget summary.



Dashboard For James Toast Jameson DEMO



Your new Dynamic Budget Summary:

- Clicking on Budget will bring you to the new Dynamic Budget Summary page. This budget summary is very similar looking to the new budget summary PDFs delivered in the Old Participant Portal in 2018. Unlike those PDFs, however, these budget summaries are dynamic web code with which you may directly interact. All data

shown is accurate as of final postings on the prior business day. Future additions will add the ability for you to click on any monthly cell to drill down to the timesheets and expenses generating that cost.

click this button to print off the currently viewed budget summary

use this drop down menu to select the desired fiscal year

Budget Summary: James Toast Jameson Demo
 Service Type: Fiscal Intermediary | MedicaidCIN: JJ00000J | Last Updated: 03/30/2019

Now viewing all plans for 2018-10-01 - 2019-09-30
 ■ 10/2018

Print Budget Summary

Budget	Amount	10/2018	11/2018	12/2018	1/2019	2/2019	3/2019	4/2019	5/2019	6/2019	7/2019	8/2019	9/2019	Total	Remainder	%
MEDICAID FUNDS																
SELF HIRED STAFF																
COMM HAB	\$11,845.60													\$0.00	\$11,845.60	100%
RESPIRE	\$4,877.60													\$0.00	\$4,877.60	100%
BROKERAGE	\$960.00													\$0.00	\$960.00	100%
IDGS																
COMMUNITY CLASSES	\$1,000.00													\$0.00	\$1,000.00	100%
NON-DIRECT SERVICE PROVISION	\$2,060.00													\$0.00	\$2,060.00	100%
MEMBERSHIPS	\$1,500.00													\$0.00	\$1,500.00	100%
STAFFING SUPPORT	\$1,040.00													\$0.00	\$1,040.00	100%
TRANSPORTATION	\$2,615.00													\$0.00	\$2,615.00	100%
DIRECT PURCHASE																
DP RESPIRE	\$8,946.25													\$0.00	\$8,946.25	100%
Medicaid Distributed	\$34,844.45													\$0.00	\$34,844.45	100%

James Toast Jameson DEMO - MedicaidCIN: JJ00000J - Last Updated: 03/30/2019

Your new Staff Action Plan:

- Clicking on Staff Action Plan will bring you to the new Staff Action Plan viewer / editor. If you are a broker, you will be able to add and edit Staff Action Plans (Instructions for editing these plans will be provided elsewhere). All other users are able to view and download the current and draft plans. Please note that if your broker has not yet started your Staff Action Plan, this page will be blank.

click this drop down menu to download blank timesheets

click this button to download a copy of your Staff Action Plan

when viewing a draft staff action plan, the button will be labeled download draft PDF and will be watermarked as DRAFT

click these buttons to review the Outcomes, Plan Safeguards, and SD Safeguards for the Staff Action Plan

Current Staff Action Plan For James Toast Jameson DEMO
 This is the current Staff Action Plan and is not editable.

Participant Name
 James Toast Jameson DEMO

Medicaid CIN
 JJ00000J

Care Coordination Organization
 Life Plan

Dates
 Review Date: 03/30/2019
 Distribution Date: 03/30/2019

Download Timesheet (dropdown menu)

Download PDF

OUTCOMES COMPLETED
 CLICK TO VIEW

PLAN SAFEGUARDS COMPLETED
 CLICK TO VIEW

SD SAFEGUARDS COMPLETED
 CLICK TO VIEW

Old Participant Portal pages:

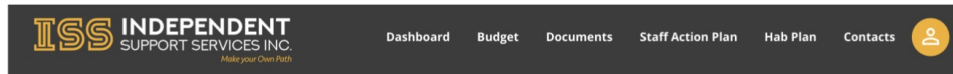
- There are three participant sections of the portal which are still supported through the Old Participant Portal. These are the **Documents**, **Hab Plan**, and **Contact**. Documents and Contacts will be migrated to the Portal in the future. Hab Plans will remain on the Old Participant Portal until they are no longer needed.

Clicking any of the links will automatically take you to the correct portal without having to re-login.

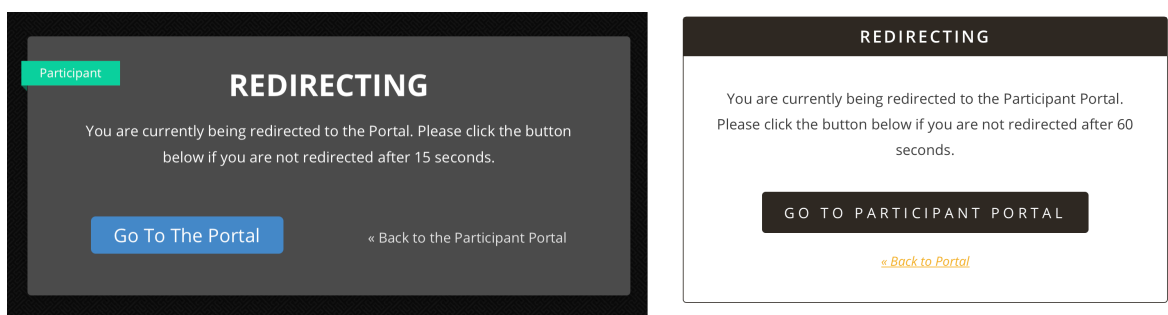
The New Portal header:



The Old Participant Portal header:

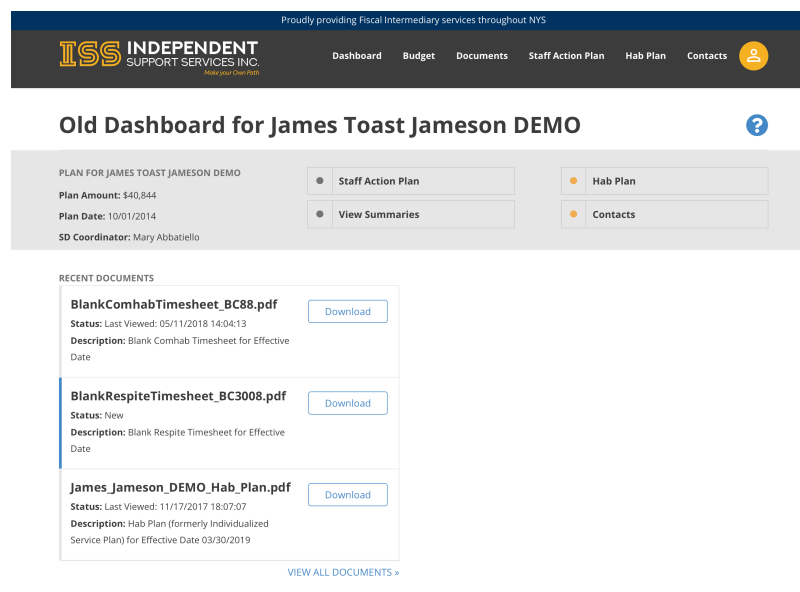


When switching between the Old Participant Portal and the new Portal, you may briefly see the following redirect screens. Your browser should automatically forward to the correct portal property. If it does not, click the button on the redirect screen.



Old Participant Portal dashboard:

- When logging into or navigating across to the Old Participant Portal, you may still be taken to the Old Participant Portal dashboard. Links which remain on this dashboard work without modification. Certain functions have been removed including View My Plan, and the State Funds (Over PRA and MES IDGS buttons). The functions are obsolete. As we migrate additional functionality into the new Portal, we will continue to remove links and options from the Old Participant Portal Dashboard.



Old Documents:

- The Documents page works as before. This page and feature will be replaced in the future with drill down functionality from the dynamic budget summary.

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Dashboard
Budget
Documents
Staff Action Plan
Hab Plan
Contacts

Completed Documents for James Toast Jameson DEMO

View Blank Documents

You have 3 documents to view

Status	Name	Description	Actions
	BlankComhabTimesheet_I	Blank Comhab Timesheet for Effective Date	Download
	BlankRespiteTimesheet_B	Blank Respite Timesheet for Effective Date	Download

Extended

Status	Name	Description	Actions
	James_Jameson_DEMO_H	Hab Plan (formerly Individualized Service Plan) for Effective Date 03/30/2019	Download

Old Hab Plans:

- The **Hab Plan** page works as before. This feature is currently deprecated and replaced by the Staff Action Plans in the new Portal. The Hab Plan editor / viewer will remain available in the Old Participant Portal until no longer needed.

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Dashboard
Budget
Documents
Staff Action Plan
Hab Plan
Contacts

View Hab Plan for James Toast Jameson DEMO

Valued Outcomes

Safeguards

Plan Submission

comhab

Rate Class	Type	Rate	
1	Base	\$17	

Valued Outcome

Supports

James wants to access his community.

Supports

James wants to get fit.

Supports

James wants to learn to travel independently.

Supports

James wants to be a pastry chef

Supports

Test This is a new VO

Supports

respite

Rate Class	Type	Rate	
1	Base	\$14	

Valued Outcome

Supports

Provide relief for James Jameson DEMO's primary caregiver(s)

Supports


Back to Old Dashboard

Old Contacts:

- The **Contacts page** works as before. This page and feature will be replaced in the future with a new contacts management section in the new Portal.

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Dashboard Budget Documents Staff Action Plan Hab Plan Contacts 

Edit Contacts for James Toast Jameson DEMO

- Participant**
- Primary Contact
- Broker

Participant Name

James Toast Jameson DEMO

First Middle Last

Address

123 James drive

Street Address

Suite 123

Address 2

Jamestown NY 10000


City State Zip



Old Participant Portal Login:

- You are still able to log into the Old Participant Portal using the existing URL. Navigate your browser to <https://participant.issny.org>, and you will be taken to the Old Participant Portal login. You may use the same credentials to log into the Old Participant Portal and the New Portal.

Participant

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 Email


 Password 

Login [Forgot your Password?](#)

- Logging into the Old Participant Portal will present you with the same **Choose a Participant** screen that you have always used to select the desired participant.

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Choose a Participant

The Participant Portal will be down for maintenance and upgrades from 6 PM Friday, 03/29 to 6 AM Monday, 04/01.

Jameson DEMO, James	>
DOB: 1/1/1990 Title: Support Broker Coordinator: Mary Abbatiello	
Maryson DEMO, Mary	>
DOB: 1/1/1980 Title: Support Broker Coordinator: ISS Test	
Thompson DEMO, Thomas	>
DOB: 1/1/1970 Title: Support Broker Coordinator: Mary Abbatiello	

Updated 12/01/20

🔄 Revision #2

★ Created Tue, Dec 1, 2020 4:28 PM by [Admin](#)

✎ Updated Mon, Dec 4, 2023 5:52 PM by [Elizabeth Lukan](#)