

## Portal Quick Start Guide

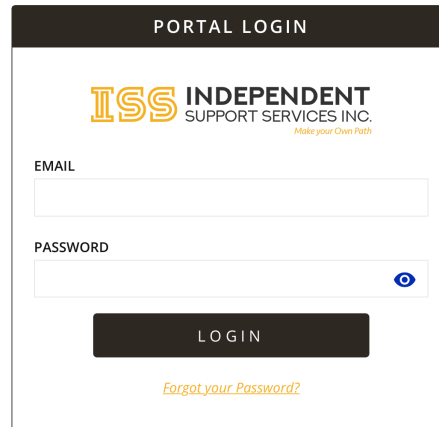
[websupport@issny.org](mailto:websupport@issny.org)

**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:

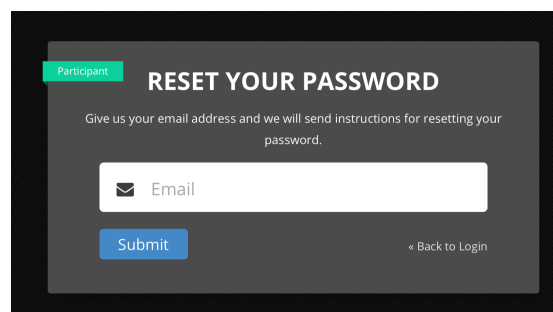
Your login credentials have been carried forward from the old ISS Participant Portal. Enter them and click the “Login” button.



The screenshot shows the 'PORTAL LOGIN' page. At the top is the ISS INDEPENDENT SUPPORT SERVICES INC. logo with the tagline 'Make your Own Path'. Below the logo are two input fields: 'EMAIL' and 'PASSWORD'. The 'PASSWORD' field has a toggle icon (an eye) to its right. Below the input fields is a dark 'LOGIN' button. At the bottom of the form is a link that says 'Forgot your Password?'.

## 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.



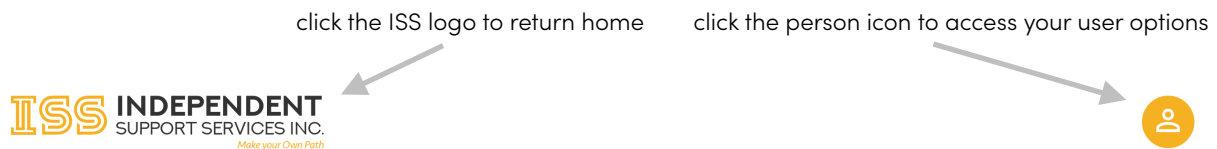
The screenshot shows the 'RESET YOUR PASSWORD' page. At the top left is a green 'Participant' tab. The main heading is 'RESET YOUR PASSWORD'. Below the heading is a message: 'Give us your email address and we will send instructions for resetting your password.' There is an input field with an envelope icon and the placeholder text 'Email'. Below the input field is a blue 'Submit' button. To the right of the 'Submit' button is a link that says '« Back to Login'.

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### 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.




### Welcome Johnny Broker DEMO



#### Choose A Participant

<b>Jameson DEMO, James</b> DOB: 1/1/1990 Title: <b>Support Broker</b> Coordinator: <b>Mary Abbatiello</b>	<b>Maryson DEMO, Mary</b> DOB: 1/1/1980 Title: <b>Support Broker</b> Coordinator: <b>ISS Test</b>	<b>Thompson DEMO, Thomas</b> DOB: 1/1/1970 Title: <b>Support Broker</b> Coordinator: <b>Mary Abbatiello</b>
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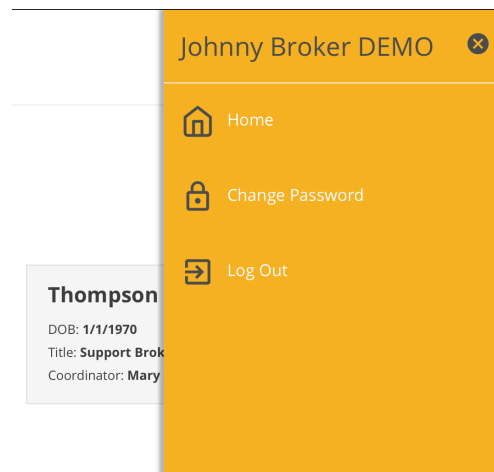
### The Person button:

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

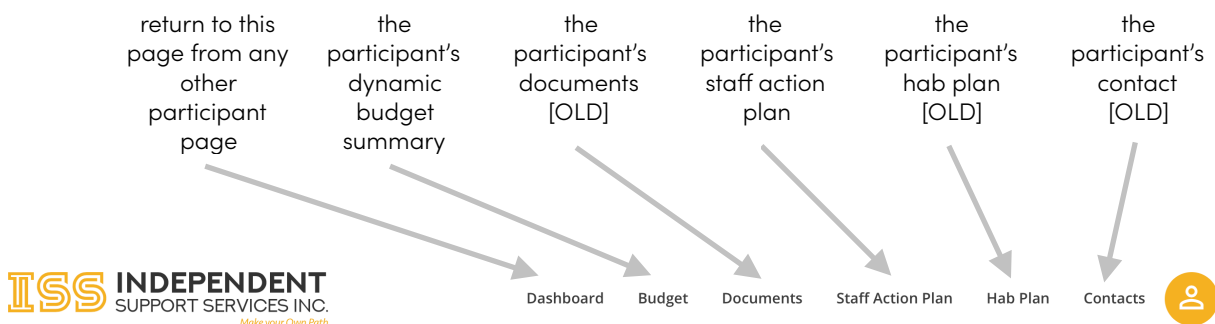


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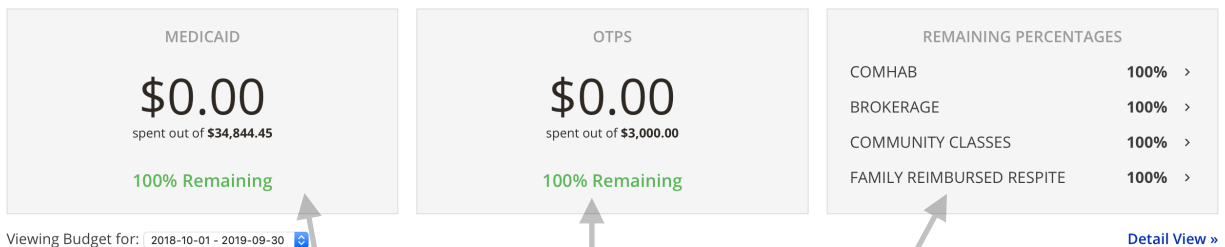
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### Your new Participant Dashboard:

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



Viewing Budget for: 2018-10-01 - 2019-09-30

[Detail View »](#)

use this drop down menu to select the desired fiscal year

this panel shows the total Medicaid dollars spent and percent of Medicaid budget remaining for the currently selected fiscal year

this panel shows the total OTPS dollars spent and percent of OTPS budget remaining for the currently selected fiscal year

this panel shows the four budget lines with the lowest percentage remaining

clicking on any of the budget lines will navigate to that line on the participant's dynamic budget summary


clicking this link will take you to the participant's dynamic budget summary


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### 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.



[Dashboard](#)
[Budget](#)
[Documents](#)
[Staff Action Plan](#)
[Hab Plan](#)
[Contacts](#)



### 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

Choose a fiscal year

2018-10-01 - 2019-09-30 

[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	%
<b>MEDICAID FUNDS</b>																
<b>SELF HIRED STAFF</b>																
COMHAB	\$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%
<b>IDGS</b>																
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%
<b>DIRECT PURCHASE</b>																
DP RESPIRE	\$8,946.25													\$0.00	\$8,946.25	100%
<b>Medicaid Distributed</b>	<b>\$34,844.45</b>													<b>\$0.00</b>	<b>\$34,844.45</b>	<b>100%</b>


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


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### 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.



DashboardBudgetDocumentsStaff Action PlanHab PlanContacts

### 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**

03/30/2019

03/30/2019

Review Date

Distribution Date

Download Timesheet


Download PDF

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

**OUTCOMES COMPLETED**

CLICK TO VIEW

**PLAN SAFEGUARDS COMPLETED**

CLICK TO VIEW

**SD SAFEGUARDS COMPLETED**

CLICK TO VIEW

page 5 of 9

## Portal Quick Start Guide

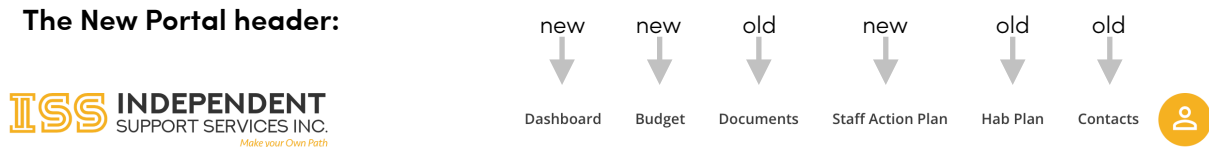
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### Old Participant Portal pages:

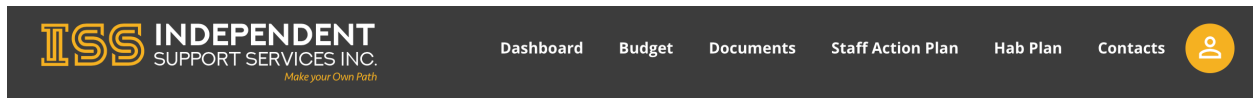
There are three participant sections of the portal which are still supported through the Old Participant Portal. These are the **Documents**, **Hab Plan**, and **Contact**. Documents and Contacts will be migrated to the Portal in the future. Hab Plans will remain on the Old Participant Portal until they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

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

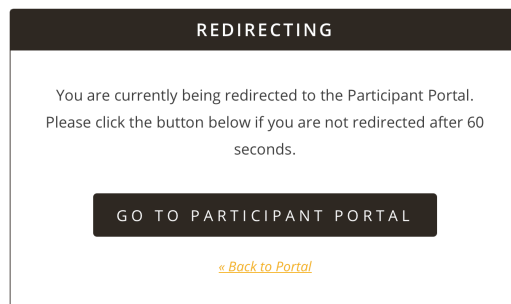
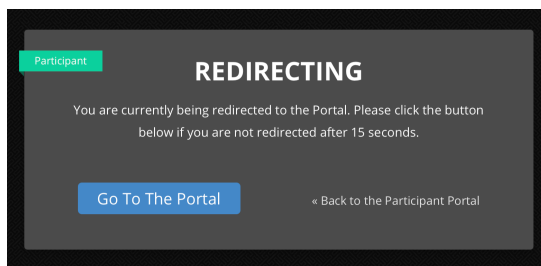
#### The New Portal header:



#### 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.

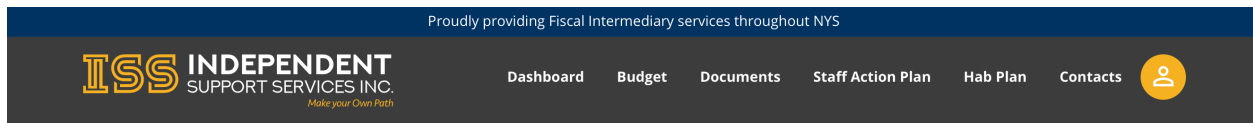


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### Old Participant Portal dashboard:

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 Dashboard for James Toast Jameson DEMO



<b>PLAN FOR JAMES TOAST JAMESON DEMO</b> <b>Plan Amount:</b> \$40,844 <b>Plan Date:</b> 10/01/2014 <b>SD Coordinator:</b> Mary Abbatiello	<input checked="" type="radio"/> <b>Staff Action Plan</b> <input checked="" type="radio"/> <b>View Summaries</b>	<input checked="" type="radio"/> <b>Hab Plan</b> <input checked="" type="radio"/> <b>Contacts</b>
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#### RECENT DOCUMENTS

<b>BlankComhabTimesheet_BC88.pdf</b> <b>Status:</b> Last Viewed: 05/11/2018 14:04:13 <b>Description:</b> Blank Comhab Timesheet for Effective Date	Download
<b>BlankRespiteTimesheet_BC3008.pdf</b> <b>Status:</b> New <b>Description:</b> Blank Respite Timesheet for Effective Date	Download
<b>James_Jameson_DEMO_Hab_Plan.pdf</b> <b>Status:</b> Last Viewed: 11/17/2017 18:07:07 <b>Description:</b> Hab Plan (formerly Individualized Service Plan) for Effective Date 03/30/2019	Download

[VIEW ALL DOCUMENTS »](#)

## Portal Quick Start Guide

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### 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	<a href="#">Download</a>
	BlankRespiteTimesheet_B	Blank Respite Timesheet for Effective Date	<a href="#">Download</a>

**Extended**

Status	Name	Description	Actions
	James_Jameson_DEMO_Hi	Hab Plan (formerly Individualized Service Plan) for Effective Date 03/30/2019	<a href="#">Download</a>

### 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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### View Hab Plan for James Toast Jameson DEMO

[?](#)

- Valued Outcomes
- Safeguards
- Plan Submission

**comhab**

Rate Class	Type	Rate	
1	Base	\$17	<a href="#">?</a>

**Valued Outcome**

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	<a href="#">?</a>

**Valued Outcome**

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

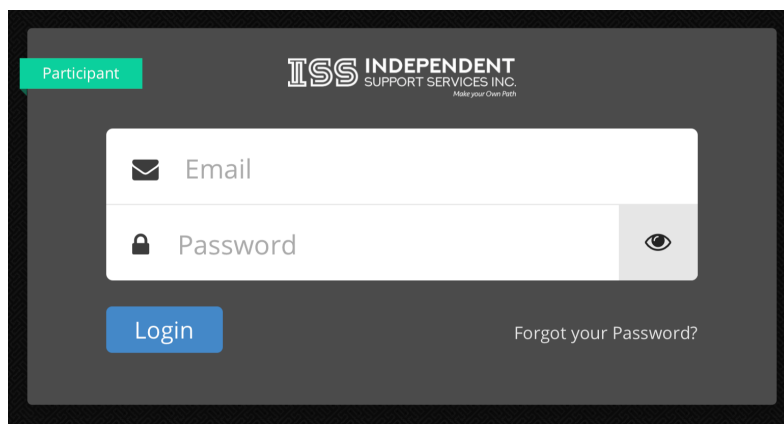


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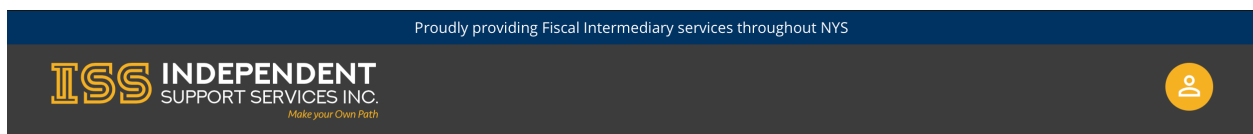
[websupport@issny.org](mailto:websupport@issny.org)

### 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.



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.



### Choose a Participant



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