PARTICIPANT DASHBOARD

Participant & Representative User Manual

ANNKISSAM
An HHAeXchange Company

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Introduction

This guide uses these words to describe people that use Participant Dashboard: **Participants, Representatives, Case Managers, and Financial Management Services (FMS) Providers**. Depending on where you live and what program you participate in, you may use different words to describe yourself. **Employees** are also mentioned throughout this guide, but they do not have access to Participant Dashboard.

Participants can also be called: Consumers, Clients, Members, Individuals, or Employers. This is the person who receives home and community-based services.

Representatives can also be called: Family, Designees, or Circle of Support. They are usually a friend or family member of the Participant. A representative might help with approving timesheets, finding a worker to hire, keeping track of budget spending, and scheduling workers.

Case Managers could also be called: Support Brokers, Service Coordinators, Skills Trainers, or Care Managers. More than one of these titles could be used for people working with the program. They are people that help the participant manage their budget and coordinate care. They may also monitor the Participant's goals and needs to make sure that the level of care provided is appropriate.

Financial Management Service (FMS) can also be called: Fiscal Intermediary (FI), Fiscal Employer Agent (F/EA), or a Fiscal Support Entity (FSE). This is an organization that collects the timesheets, processes hiring paperwork, and manages payroll. They have additional administrative functions with billing and taxes.

Employees can also be called: PCAs, DSPs, PHWs, Workers, or Caregivers. This is a person who provides Home and Community-based services to Participants.

<u>What is Participant Dashboard?</u>

Participant Dashboard provides online read-only access to budget usage information for program participants and their authorized representatives (including Case Managers). With access to Participant Dashboard, you will be able to view budget, timesheet, invoice, and lump payment data submitted to the FMS in real-time to keep track of spending. You can also download spending reports and view current enrollment information, employee and Case Manager contact data, and FMS announcements and contact information.

Account Setup

A valid email address is required in order to create your account so be sure your FMS has your up-to-date and preferred email if there have been changes recently. Once an administrator at your FMS creates your account with Participant Dashboard, you will receive a welcome email to Participant Dashboard with instructions on the remaining steps to confirm your account and set a password.

FMS One is a single sign-on solution that allows you to manage your online accounts securely and easily. When signing into the system, log in using the FMS One sign in button on the login screen pictured below.

If you have already signed up for your FMS One account previously, you can log into your account by entering your email and password. **If you have not signed up for FMS One yet, click the "Sign Up" link and follow the steps included in your welcome email that was sent to you by the FMS. Detailed FMS One sign-up instructions are available in the FMS One Quick Guide.**

Links to Video Walkthroughs

For a detailed walkthrough of setting up your FMS One account, please visit https://vimeo.com/521548927

If you do not have an email account yet, we have instructional videos available that will help guide you through setting one up.

Please visit https://vimeo.com/showcase/9066918 for more information.

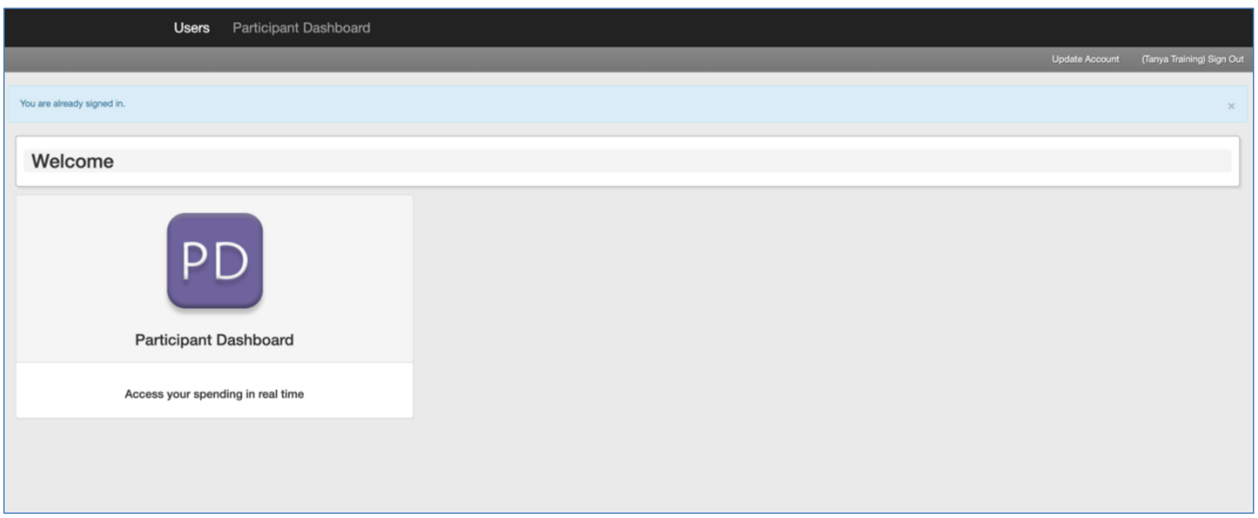
Logging in and out of Participant Dashboard

Log in to Participant Dashboard:

1. To access Participant Dashboard, navigate to your FMS' system login page.
2. Click "Sign In with FMS One".
3. Enter the email and password associated with your account.

Once logged in, you will see the User landing page that displays the applications your account has been granted access to (displayed on the next page).

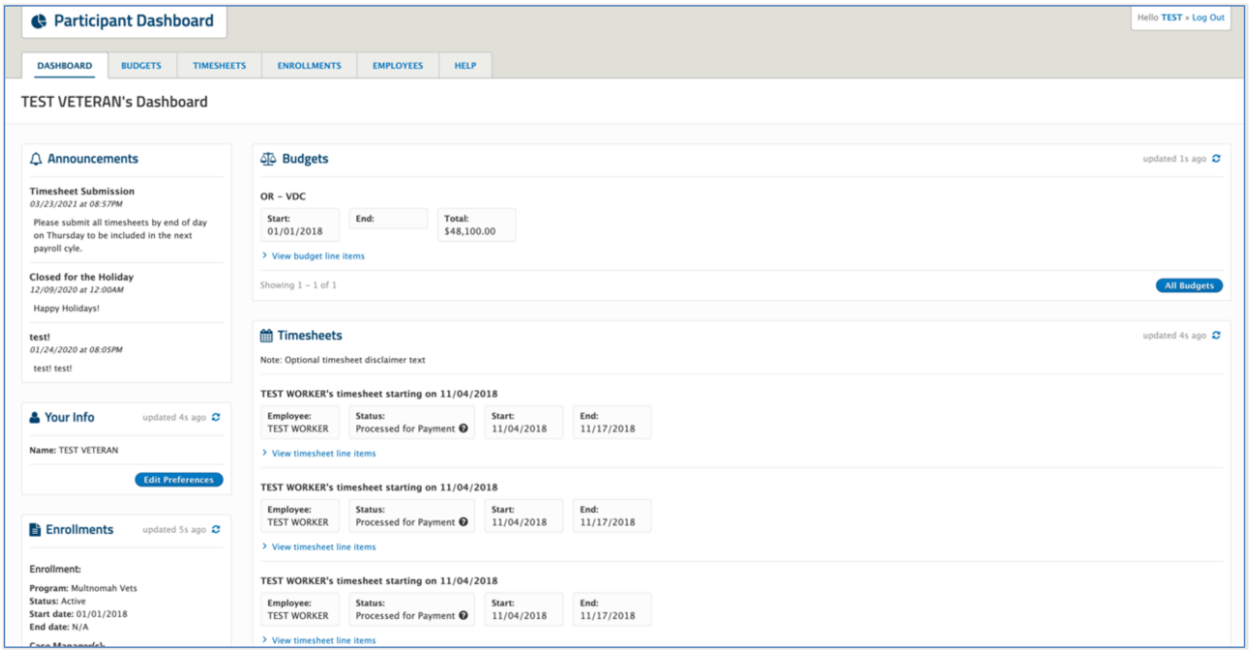
4. Click on the Participant Dashboard icon to open Participant Dashboard.
5. Click on the blue "Sign in with FMSE Users" button.



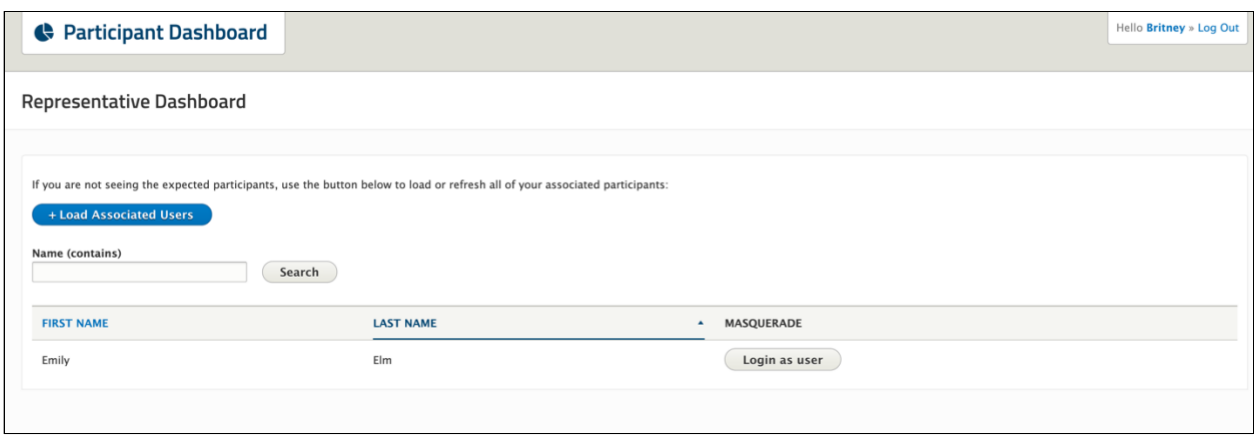
Sign-In User Landing Page

Participant and Representative Users

As a Participant or Representative user of Participant Dashboard, you will have access to view the Participant Dashboard using a Participant or a Representative role. This means that you will be able to view data for yourself or data for the Participant(s) you represent. When you sign-in to the Participant Dashboard, the initial view will be like the screen capture below depending on your role.



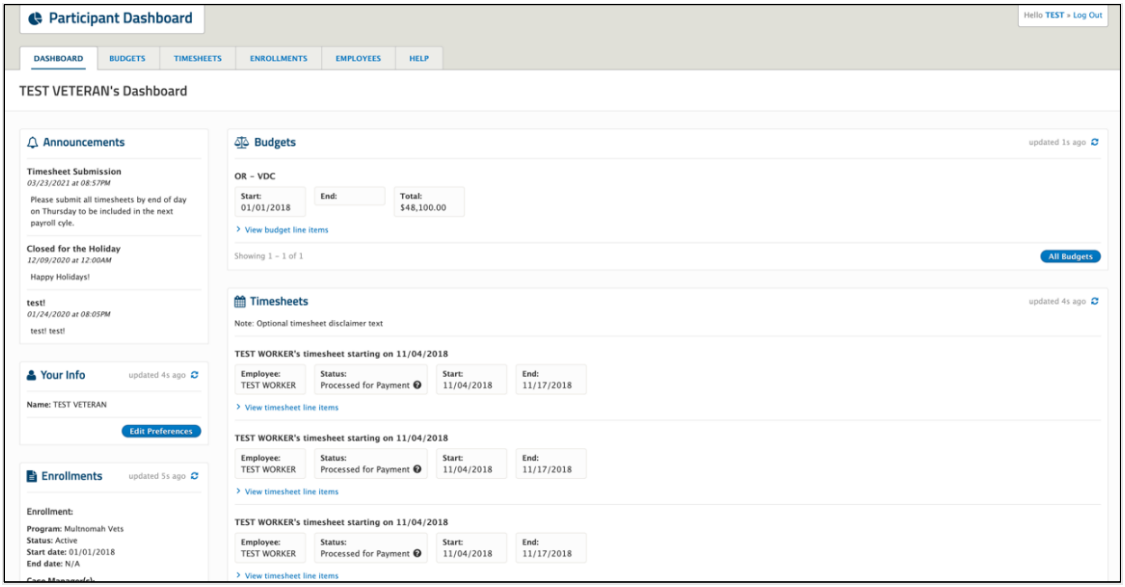
Participant Dashboard Page



Representative Dashboard Page

Participants are brought directly to their information. Representatives must select the participant's information that they want to view first. Next to each Participant's name is a "login as user" button; this will allow you to "masquerade" as that user and view the Participant Dashboard the same way that participant can view the dashboard. Going forward in this manual, we'll present instructions that mirror the view of using the Participant Dashboard as a Participant.

Using Participant Dashboard



Participant/Representative's Main View of Participant Dashboard

After logging in (or clicking on a "login as user" button), you will be brought to the main Dashboard page for that Participant. On this page, you will be able to view budget, timesheet, lump payments, invoice, and spending reports data at a snapshot as well as view any announcements from the FMS, the current enrollment, and contact information for the employees and case managers associated to the participant.

Data will be automatically refreshed and updated at the time of each login. At the top right corner of the information boxes, you'll find a small blue circle and information on when the data was last updated. Clicking this will refresh the data and pull in any new updates in real-time. Across the top of the page is a row of tabs, that will bring you to a summary page for each of those specific items.

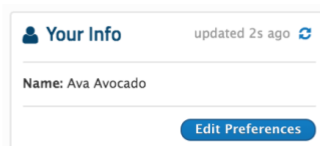
Please note: the dashboard will display the most recent summary of each tab at the top of the page. Using the "All" button in a section on the dashboard will also direct you to the top tab view of each page.

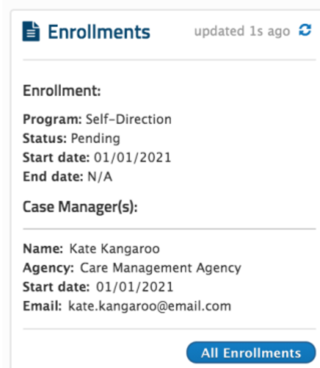
Announcements Section

If the FMS has posted any announcements, they will appear at the top of the left-hand navigation bar on the main Dashboard page.

Your Info and Enrollments Section

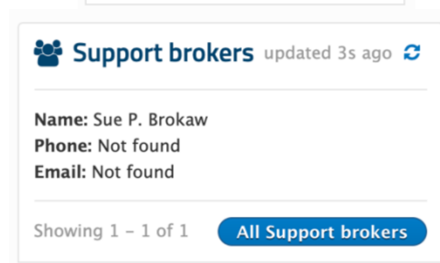
The "Your Info" and "Enrollments" sections contain a snapshot of any current enrollment information as well as any current case manager contact information. Your info should be listed here. If you notice that your information is out of date, contact the FMS Provider to update your contact information using your FMS Providers preferred method.





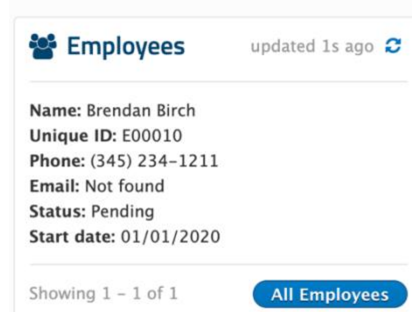
Support Brokers Section

The "Support Brokers" section contains information on the participant's connected Support Brokers, including contact information. Not all implementations will have this section displayed on the Participant's Dashboard.



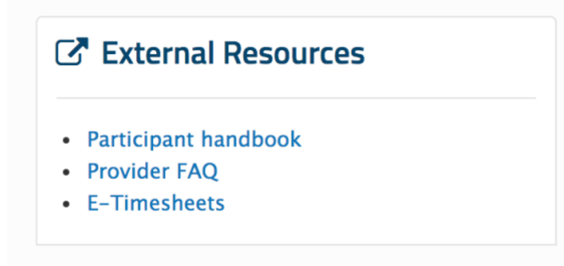
Employees Section

The "Employee" section contains information on the participant's registered employees, including contact information.



External Resources Section

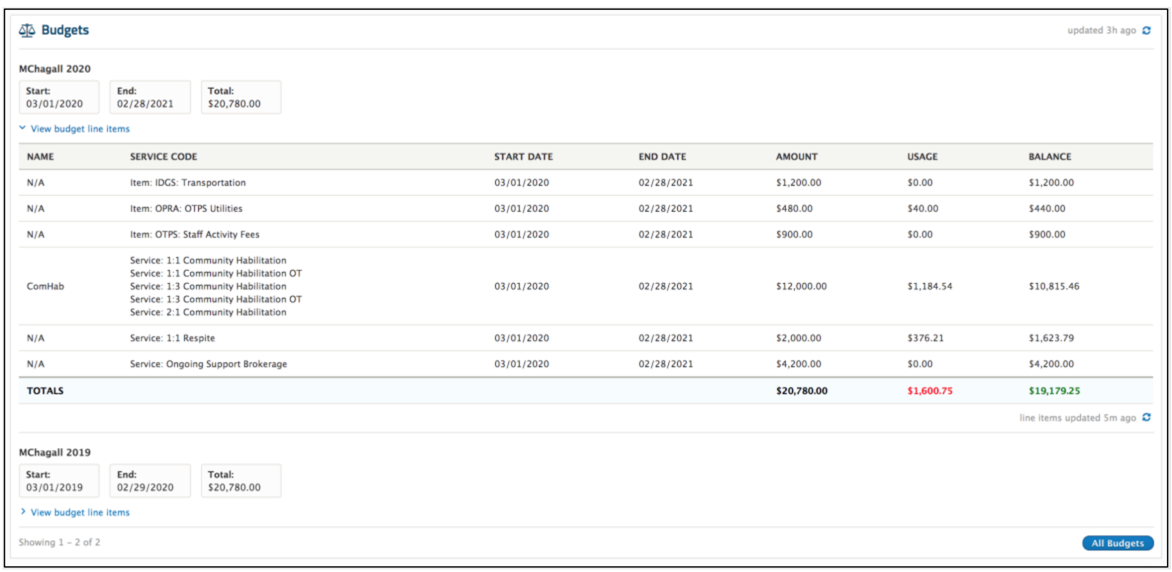
This section contains links to helpful resources outside of Participant Dashboard. Links available here are at the discretion of the FMS Provider, not all implementations will have links.



Budgets Tab

The Budgets tab contains information on the participant's budget(s). There is some information directly on the dashboard home page. Click into the "View budget line items" to view more detailed information which appears at the budget line-item level.

To view all budgets, click into the "Budgets" tab or on the blue "All Budgets" button at the lower right corner of the box. This page has search functionality to filter the budgets based on specific criteria such as employee name and budget start date.



Budgets

updated 3h ago

MChagall 2020

Start: 03/01/2020 | End: 02/28/2021 | Total: $20,780.00

View budget line items

NAME	SERVICE CODE	START DATE	END DATE	AMOUNT	USAGE	BALANCE
N/A	Item: IDGS: Transportation	03/01/2020	02/28/2021	$1,200.00	$0.00	$1,200.00
N/A	Item: OPRA: OTPS Utilities	03/01/2020	02/28/2021	$480.00	$40.00	$440.00
N/A	Item: OTPS: Staff Activity Fees	03/01/2020	02/28/2021	$900.00	$0.00	$900.00
ComHab	Service: 1:1 Community Habilitation Service: 1:1 Community Habilitation OT Service: 1:3 Community Habilitation Service: 1:3 Community Habilitation OT Service: 2:1 Community Habilitation	03/01/2020	02/28/2021	$12,000.00	$1,184.54	$10,815.46
N/A	Service: 1:1 Respite	03/01/2020	02/28/2021	$2,000.00	$376.21	$1,623.79
N/A	Service: Ongoing Support Brokerage	03/01/2020	02/28/2021	$4,200.00	$0.00	$4,200.00
TOTALS				**$20,780.00**	**$1,600.75**	**$19,179.25**

line items updated 5m ago

MChagall 2019

Start: 03/01/2019 | End: 02/29/2020 | Total: $20,780.00

View budget line items

Showing 1 – 2 of 2

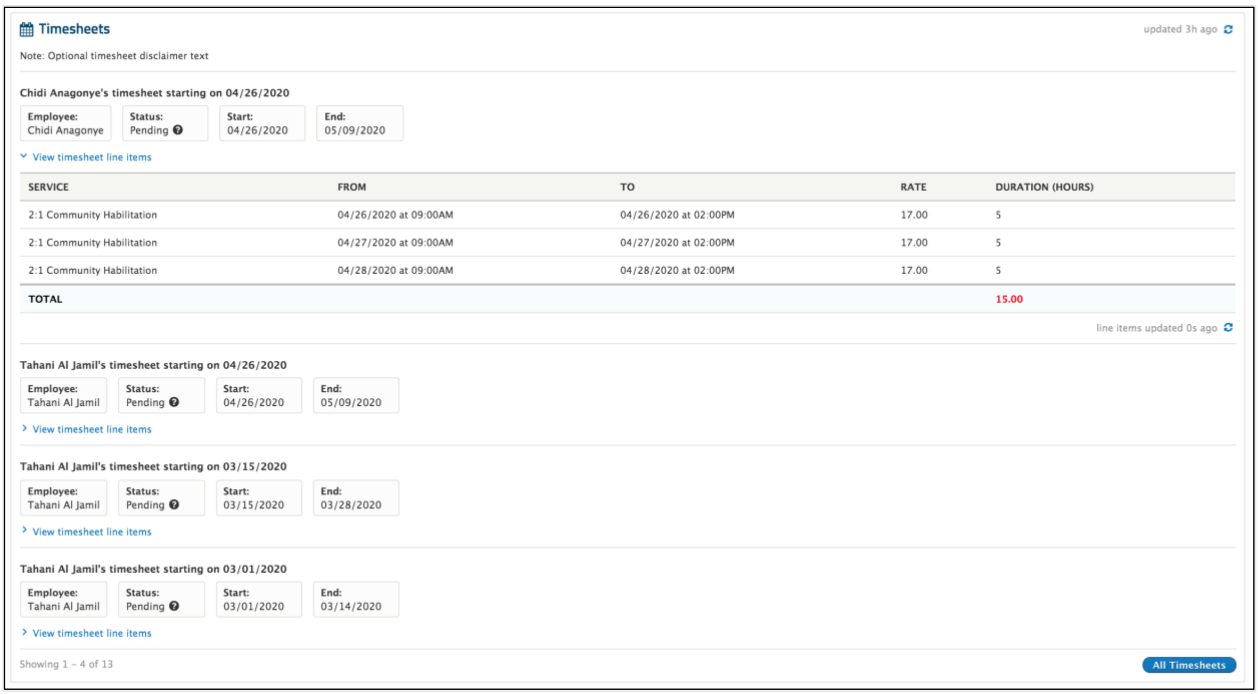
All Budgets

Budget View with Budget Line Item Detail

Timesheets Tab

With a similar structure to Budgets, the Timesheets tab contains information on an employee's submitted timesheets. Some timesheet information is available directly on the main dashboard; more data available at the line-item level when you select the "View timesheet line items".

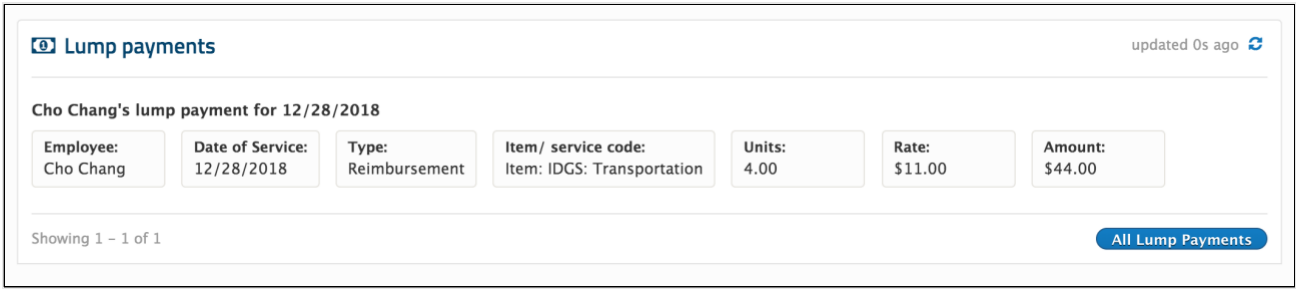
To view all timesheets and be able to search and filter, click into the "Timesheets" tab or the blue "All Timesheets" button. This page has search functionality to filter the timesheets based on specific criteria.



Timesheet View with Line Item Detail

Lump Payments Tab

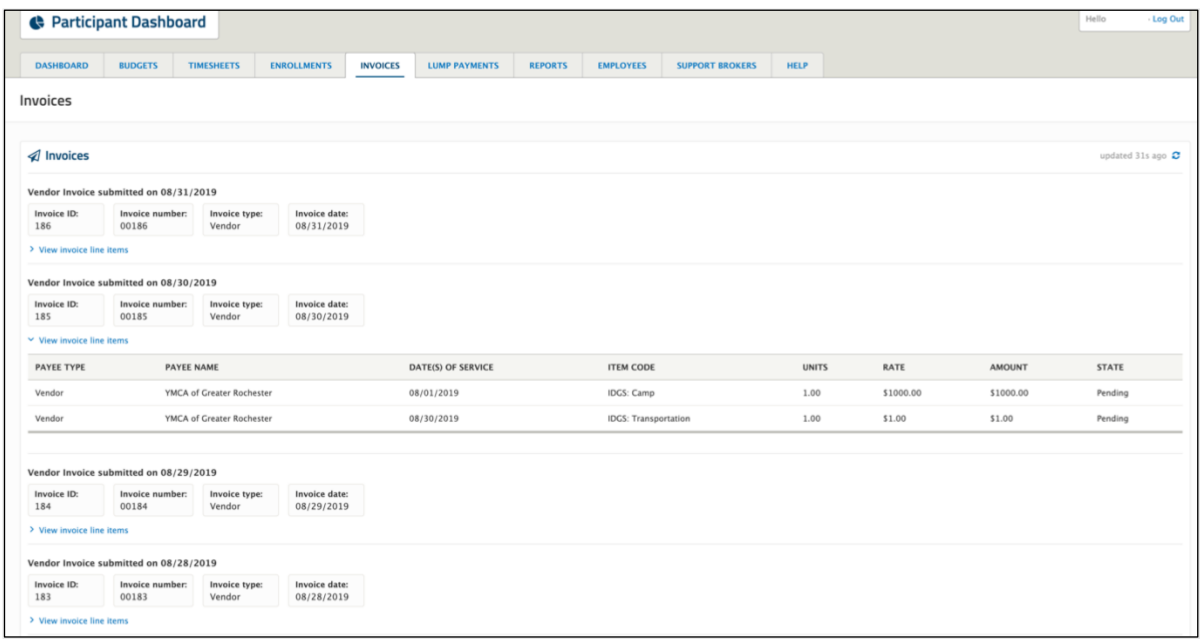
The "Lump Payments" section displays any lump payment data. To view all lump payments, click into the "Lump Payments" tab or the blue "All Lump Payments" button. Not all implementations will show this section. If the program does not use Lump Payments, you may not see this section displayed in the dashboard.



Lump Payments – Basic Dashboard View

Invoices Tab

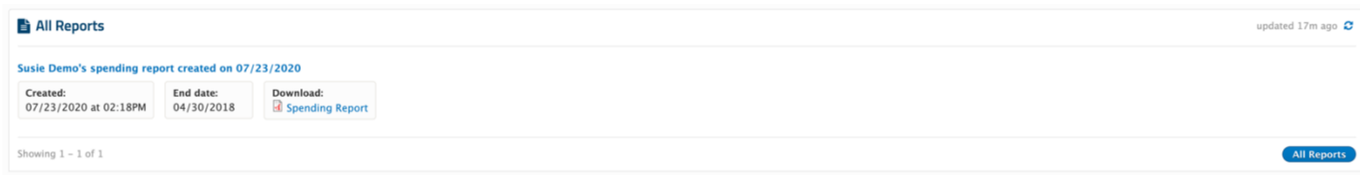
This section contains invoice information. More data is available at the line-item level when you select "View invoice line items". To view all invoices, click into the "Invoices" tab or the blue "All Invoices" button. If the program does not use invoices, no invoices will be displayed, or this section will be missing from the dashboard.



Invoices View with Line Item Detail

Spending Reports Tab

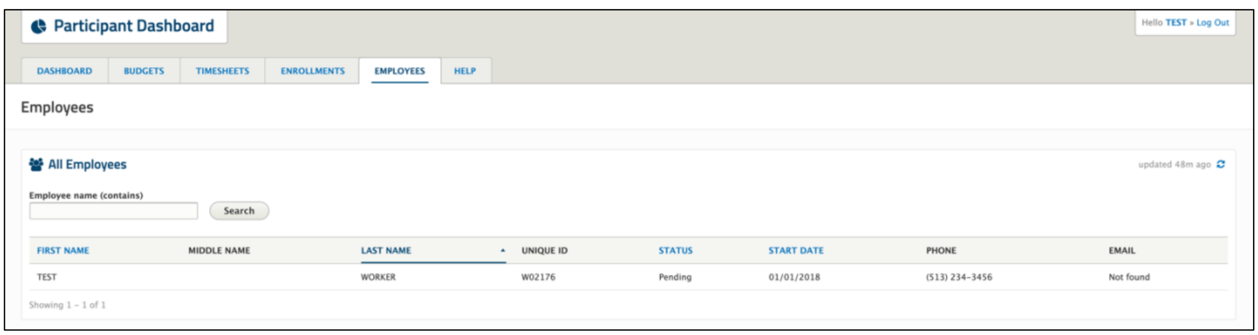
Recent spending reports are available for view and download. Click the blue “Spending Report” link to download a PDF copy. To view all spending reports, click into the “Spending Reports” tab or click the blue “All Reports” button. The most current spending report will be listed first, followed by any prior spending reports issued previously.



Reports Section

Employees & Support Brokers Tabs

Clicking on either of these tabs will bring up a list of all persons in those roles associated to the Participant. The Employee index can be filtered and sorted if needed.



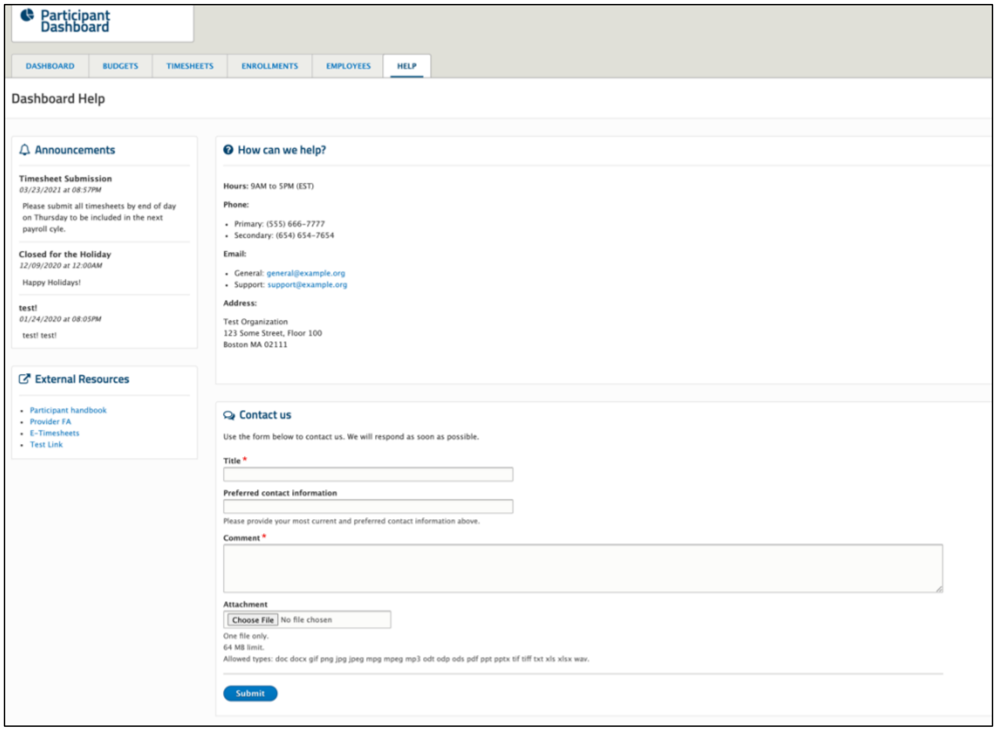
Employee Index View

Support Broker Index View

The Help Tab

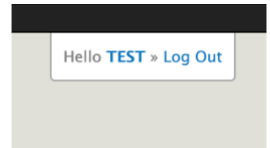
The last tab on the top bar, labeled "Help" directs you to a page with contact information for the FMS. If you have any questions, you can use the information on this tab to assist you in who to contact. Some FMS Providers have enabled a Contact Us form to allow the Participant and/or Representatives to securely contact them.

In addition to the displayed help option, the "Announcements" and "External Resources" displays from the Dashboard are displayed on the left side bar.

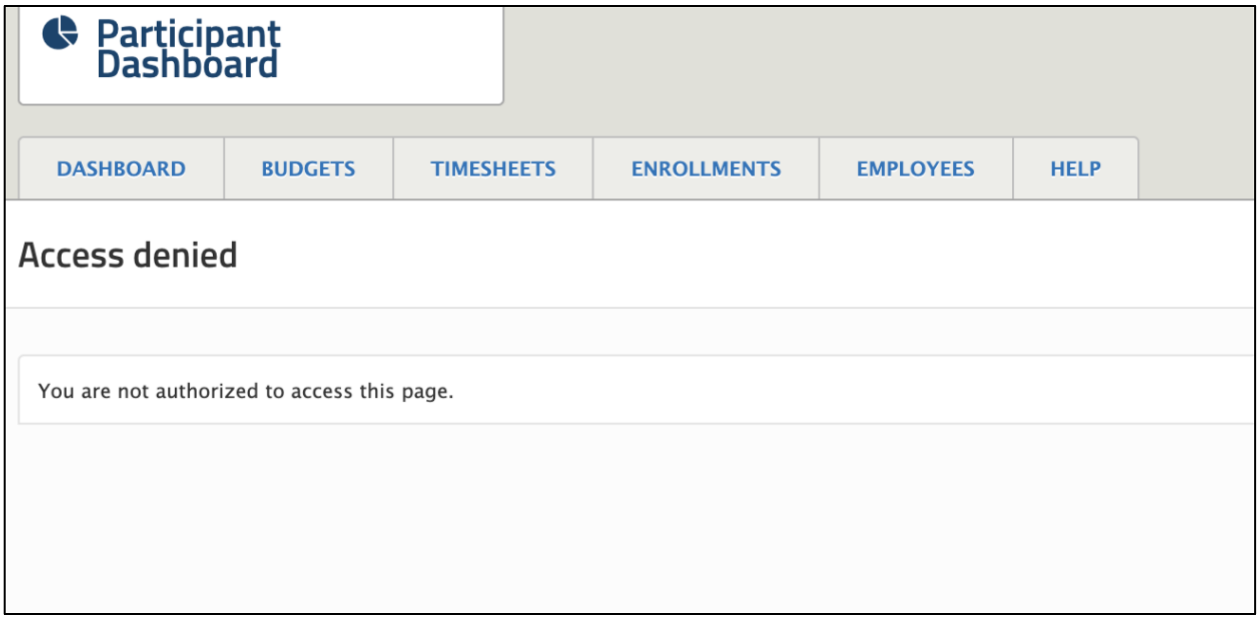


Sample Help Tab Page View

Switch Between Participants (Representatives only)

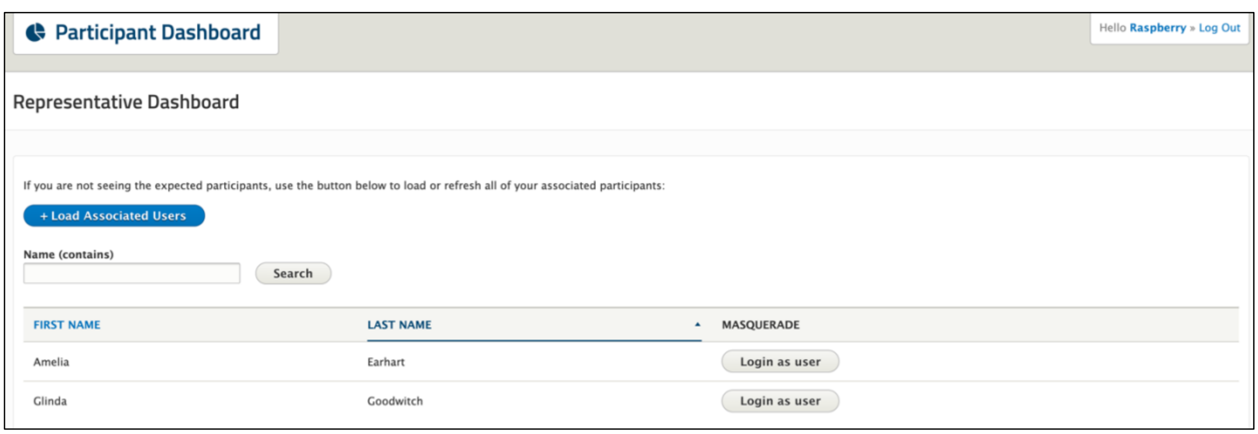


As a Representative, you might represent more than one Participant. In order to switch between the views for these Participants, you will need to log out from the current Participant's view before you switch to another Participant's view. This is quickly accomplished by clicking the Log Out link in the upper right corner of the screen from any page when viewing as a Participant. This will return you to your index where you can select another Participant's dashboard to view. If you try to view the dashboard of another Participant before signing out as the first participant, you will see an error message.



Error Message

If that error happens, first click the logout link in the upper-right corner, then refresh the page (if needed) to return to your participant's index.

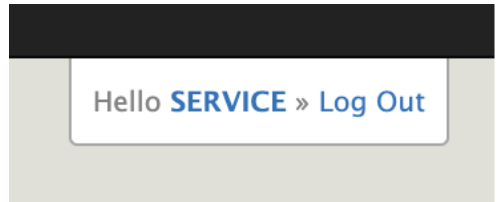


Representative with more than one Participant

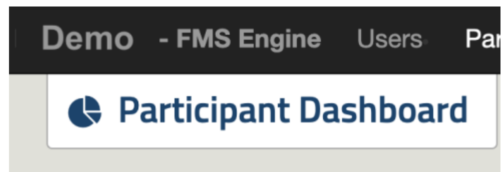
System Log Out

It is particularly important to make sure you completely log yourself out of the system, especially if you are using a public computer or sharing with another person. You must first log out of Participant Dashboard and then log out of the system.

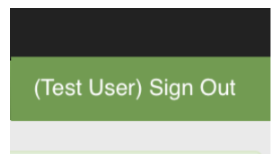
1. Click the "Sign out" button in Participant Dashboard. Upper Right Corner.



2. Click on the "Users" link in the top navigation bar.



3. Click the "Sign Out" link on the top right of the Users application landing page.



Document Revision History

Date	Description of Revision
03/31/2021	Initial version of the document
01/10/2022	Updated screen captures, added links to email videos