



Participant Dashboard

INSTANT ACCESS TO YOUR FISCAL ASSISTANCE INFORMATION

Introduction

- ▶ Participant Dashboard is a program that links participants, representatives, case managers, and administrators to live information about Fiscal Assistance accounts.
- ▶ Each user creates a password linked to a unique email address.
- ▶ Case Managers and administrators are able to see information about their specific members.
- ▶ Fiscal Assistance is able to share announcements to all Participant Dashboard users.
- ▶ Users are able to access:
 - ▶ Budgets
 - ▶ Timesheets
 - ▶ Employee information
 - ▶ Individual Spending Reports
 - ▶ Help

Creating your account

- ▶ Step 1: You will receive an email from noreply@annkissam.com with the subject line **'FA Dashboard'**
- ▶ Your email will contain the following language so you can be assured it is not spam or phishing.

Header:

You are receiving this message from Fiscal Assistance, Inc. It is an invitation from our software company to participate in our new Participant Dashboard program where you can log in and see your budget and timesheet information for self- directed services. This is NOT a spam message.

Footer:

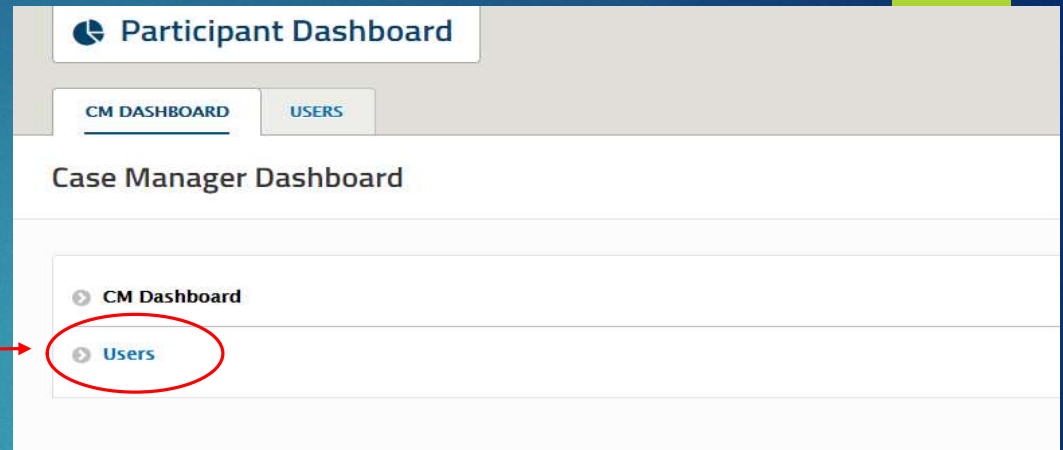
YOU CANNOT REPLY DIRECTLY TO THIS MESSAGE. If you have questions about this message, please contact Scarlett Russell at (608) 733-6237 or scarlett@fiscalassistance.org

Creating your account

- ▶ Step 2: Follow the instructions contained in that email to confirm your account & reset your password (be sure to store your password in a secure location)
- ▶ Step 3: Once you have set your password, go to <https://fa-pd-birch.annkissamprojects.com> to log in to Participant Dashboard
- ▶ Step 4: If you have questions, reach out to the FA Enrollment team at Enrollment@fiscalassistance.org or via phone at 608-733-6237 for Scarlett Russell

Viewing Member Information

- ▶ When you log in as a Care Manager, you will need to select “users” to see a list of all of your active members.
- ▶ Each time you log in, you should start your session by clicking the “Load Associated Users” button to make sure you have the most current list of your members.
 - ▶ The first time you log in, this may take a few extra minutes if you have a lot of active members.



Viewing Member Information

Use the button below to load or refresh all of your associated participants:

[+ Load Associated Users](#)

Name (contains)

[Search](#) [Reset](#)

FIRST NAME	LAST NAME	MASQUERADE
<input type="text"/>	<input type="text"/>	Login as user

- ▶ To view a member's budget information, current timesheets, active and closed employees, and contact information, you simply search for the member. When you see the member's name on the search results, select "Login as user" using our Masquerade feature.

Courtney Consumer's Dashboard

Announcements

A second example announcement
08/18/2017 at 08:00PM
The three most recent announcements will appear in this area. Only provider staff can post announcements.

An example announcement
08/10/2017 at 03:30PM
Don't forget to RSVP for the 2017 Family Fun Day picnic!

Your Info updated 2h ago

Name: Courtney Consumer
Status: Active
Your Enrollment(s)
Program: Program A
Case manager: Sally Support
Case manager email: sally@example.com
Case manager phone: (617) 234-5678
Program: Program B
Case manager: Ariel Tritonssdottir
Case manager email: cm@example.com
Case manager phone: (617) 345-6789
[Edit Preferences](#)

Budgets

> Courtney - 2017
Start: 07/01/2017 End: 06/30/2018 Total: \$1,587.62

> Courtney - 2016
Start: 10/01/2016 End: 09/30/2017 Total: \$12,000.0

> 2016 - Annual Budget
Start: 07/01/2016 End: 06/30/2017 Total: \$15,000.0

> 2015 - Annual Budget
Start: 01/01/2015 End: 12/31/2015 Total: \$16,000.0

Showing 1 - 4 of 5

Timesheets

> Emily Employee's timesheet starting on 09/11/2016
Employee: Emily Employee Status: Processed for Payment Start: 09/11/2016 End: 09/24/2016

> Emily Employee's timesheet starting on 08/28/2016
Employee: Emily Employee Status: Pending Start: 08/28/2016 End: 09/10/2016

> Emily Employee's timesheet starting on 08/14/2016
Employee: Emily Employee Status: Pending Start: 08/14/2016 End: 08/27/2016

> Emily Employee's timesheet starting on 07/31/2016
Employee: Emily Employee Status: In Process Start: 07/31/2016 End: 08/13/2016

Showing 1 - 4 of 10

Employees updated 2h ago

Name: Emily Employee
Phone: (617) 456-7890
Email: emily.employee@example.com
Status: Active
Start date: 01/01/2014
Showing 1 - 1 of 1
[All Employees](#)

External Resources

- Participant handbook
- Provider FAQ
- E-Timesheets

FA will keep members and representatives updated with the announcement feature.

Members and SDS Team have instant access to most current budget details.

Users have access to up-to-date timesheet data.

Members and representatives can see active employees.

Consumer Dashboard

- ▶ When you log in as a member, you will see exactly what they would see if they logged in to their own account.
- ▶ The first page available to you will be the Consumer Dashboard which provides a quick glance at member information.

Budgets

All Budgets

Budget name (contains) Budget start is equal to Start date

> Courtney - 2017

Start:	End:	Total:
07/01/2017	06/30/2018	\$1,587.62

> Courtney - 2016

Start:	End:	Total:
10/01/2016	09/30/2017	\$12,000.0

> 2016 - Annual Budget

Start:	End:	Total:
07/01/2016	06/30/2017	\$15,000.0

> 2015 - Annual Budget

Start:	End:	Total:
01/01/2015	12/31/2015	\$16,000.0

> 2014 - Annual Budget

Start:	End:	Total:
01/01/2014	12/31/2014	\$14,000.0

Showing 1 - 5 of 5

Budgets

This page contains up-to-date information about each participant's past and current budgets. This information is automatically updated every 12 hours, but can also be manually refreshed for real time data.

Timesheets

- ▶ Users have the ability to see all timesheets submitted for each employee, the status of the timesheet, and the dates the pay period started and ended.
- ▶ The search feature enables users to search for an employee, a specific pay period, or a specific timeframe.

Participant Dashboard

DASHBOARD BUDGETS **TIMESHEETS** EMPLOYEES HELP

Timesheets

All Timesheets

Note: results are limited to the 200 most recent timesheets.

Employee name (contains)	Status	Pay period start	Start date	End date	Search
▶Emily Employee's timesheet starting on 09/11/2016					
Employee:	Status:	Start:	End:		
Emily Employee	Processed for Payment	09/11/2016	09/24/2016		
▶Emily Employee's timesheet starting on 08/28/2016					
Employee:	Status:	Start:	End:		
Emily Employee	Pending	08/28/2016	09/10/2016		
▶Emily Employee's timesheet starting on 08/14/2016					
Employee:	Status:	Start:	End:		
Emily Employee	Pending	08/14/2016	08/27/2016		
▶Emily Employee's timesheet starting on 07/31/2016					
Employee:	Status:	Start:	End:		
Emily Employee	In Process	07/31/2016	08/13/2016		
▶Emily Employee's timesheet starting on 07/17/2016					
Employee:	Status:	Start:	End:		
Emily Employee	Pending	07/17/2016	07/30/2016		
▶Emily Employee's timesheet starting on 11/08/2015					
Employee:	Status:	Start:	End:		
Emily Employee	Processed for Payment	11/08/2015	11/21/2015		
▶Emily Employee's timesheet starting on 10/25/2015					
Employee:	Status:	Start:	End:		
Emily Employee	Processed for Payment	10/25/2015	11/07/2015		

Employees

The search feature on each page allows users to quickly access information.

Users have instant access to employee contact information, status, and start date.

Click the refresh icon on any page to get an up-to-the-second view.

Participant Dashboard

HELLO Courtney » Log Out

DASHBOARD BUDGETS TIMESHEETS **EMPLOYEES** HELP

Employees

All Employees

Employee name (contains) Status - Any -

FIRST NAME	MIDDLE NAME	LAST NAME	PHONE	EMAIL	STATUS	START DATE
Emily		Employee	(617) 456-7890	emily.employee@example.com	Active	01/01/2014

Showing 1 - 1 of 1

updated 2h ago

Spending Reports

The screenshot shows a web application interface with a navigation bar at the top containing tabs for DASHBOARD, BUDGETS, TIMESHEETS, REPORTS, EMPLOYEES, and HELP. The REPORTS tab is circled in red. Below the navigation bar, the page title is 'Reports'. Underneath, there is a section titled 'All Reports' with a list of reports. The most recent report is highlighted, showing its creation date (04/05/2019 at 07:19PM), end date (03/31/2019), and a 'Download' button with a document icon and the text 'Spending Report'. This button is also circled in red. A second report is visible below it, created on 03/29/2019 at 02:39PM, with an end date of 123118 and a similar 'Download' button.

- ▶ Case Managers and Participants can log in to see individual spending reports.
- ▶ Users should find the 'reports' tab at the top of the screen, and click on it to access all spending reports.
- ▶ The most current spending report will be listed at the top. Click the download button to view.
- ▶ FA, inc will be running spending reports monthly for each member and will create an announcement to let users know when a new report is ready.

Spending Report Preview

Client Name:	██████████	PMI:	██████████
Agency:	Care Wisconsin, CW First	Budget Dates:	1/1/19-12/31/19
Program:	Family Care	Report Dates:	1/1/19-3/31/19

S5125 Ua								
Employee	Vendor /Expense	Service Date(s)	Rate /Cost	Hours /Units	Usage	Authorized Amount	Total Usage	Current Balance
██████████	--	12/30/18 - 1/12/19	\$10.75	11.50	\$123.63	\$2495.00	\$646.22	\$1848.78
██████████	--	1/13/19 - 1/26/19	\$10.75	10.00	\$107.51			
██████████	--	1/27/19 - 2/9/19	\$10.75	12.50	\$134.38			
██████████	--	2/10/19 - 2/23/19	\$10.75	12.00	\$129.01			
██████████	--	2/24/19 - 3/9/19	\$10.75	12.50	\$134.39			
--	Employer Taxes				\$17.30			

Last Payment Date	4/5/19
Usage as of last payment date	24.4%
Expected usage as of last payment date	26.03%
Total Budgeted Amount	\$2795.00
Total Usage in Report Period	-\$682.42
Current Budget Balance	\$2112.58

*Your actual usage is indicated as 'Usage'. 'Expected Usage' indicates expected usage for this budget based off of the submitted report dates. Your usage rate is real-time and this includes any timesheets or invoices that you have submitted and are processed, but may have not been paid yet. Refer to the detail of your spending summary to determine the specific invoices and timesheets that have been processed and are included in your usage rate.

- ▶ Spending reports will list participant information at the top including name, member ID, agency, funding source, and report date range.
- ▶ Each employee will be listed so that participant/case manager can view amounts and units paid out each pay period.
- ▶ Employer taxes are also shown on the report.
- ▶ The bottom portion of the payment gives the user an idea of the usage of total budget vs. what would be expected at this point in the authorization.
- ▶ Users can help to monitor over/under usage using this tool.

Help

Users have access to FA contact information right on their Dashboard and can see announcements.

Participant Dashboard

DASHBOARD BUDGETS TIMESHEETS EMPLOYEES **HELP**

Dashboard Help

🔔 Announcements

Welcome to Participant Dashboard!
09/12/2018 at 12:30PM

Fiscal Assistance is excited to begin rolling out our new Participant Dashboard program. We hope this will make it easier to manage self-directed supports by giving you live, up-to-date information about budgets, timesheets, and employees. Check back regularly for improvements, announcements, and current data.

Thank you for choosing Fiscal Assistance for your Employer Agent needs. We look forward to providing continued opportunities to strengthen your experience.

Regards,

The Fiscal Assistance Employer Agent Team

🔗 How can we help?

Phone:

Hours: 8:30AM to 4:30PM

- (608) 846-7058
- (608) 275-3814
- (855) 201-4230 (toll free)

Fax:

- General: (608) 846-3412
- Payroll: (608) 842-0459

Email:

- enrollment@fiscalassistance.org

Address:

124 W. Holum Street
Deforest, WI 53532

Ongoing Support

- ▶ If you have ongoing technical challenges, questions, or feedback, please contact Scarlett Russell at Fiscal Assistance: (608) 733-6237.
enrollment@fiscalassistance.org
 - ▶ We are able to do some simple tasks such as resetting your password or sending you a new invitation to the program with one click!
- ▶ Please continue to keep us updated when you leave a team. This will help to ensure accuracy in our program.
- ▶ Your SDS Team or Department Supervisor also has access to ALL active members using your case management agency. If there is a question about someone on another team, you can use them as a resource.