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:

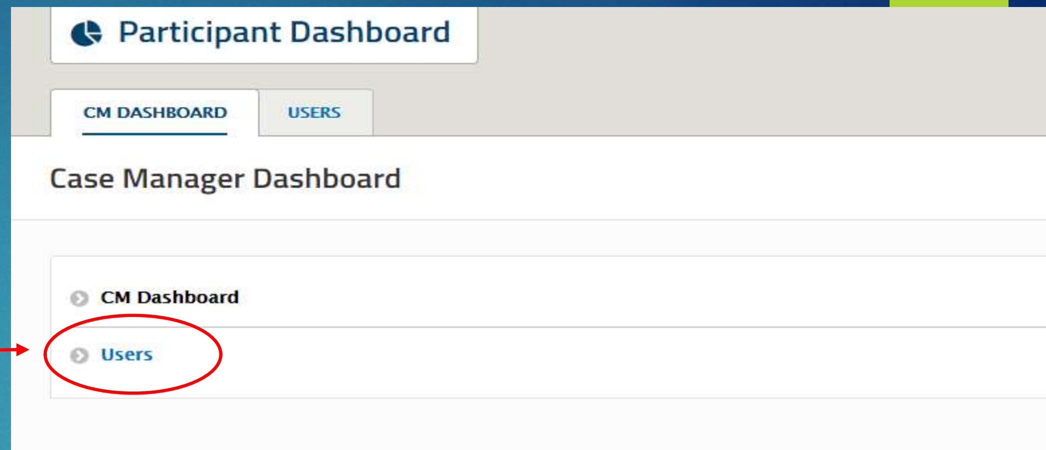
YOU CANNOT REPLY DIRECTLY TO THIS MESSAGE. If you have questions about this message, please contact Scarlett Russell at (608) 733-6237 or scarlettr@fiscalassistance.org

Creating your account

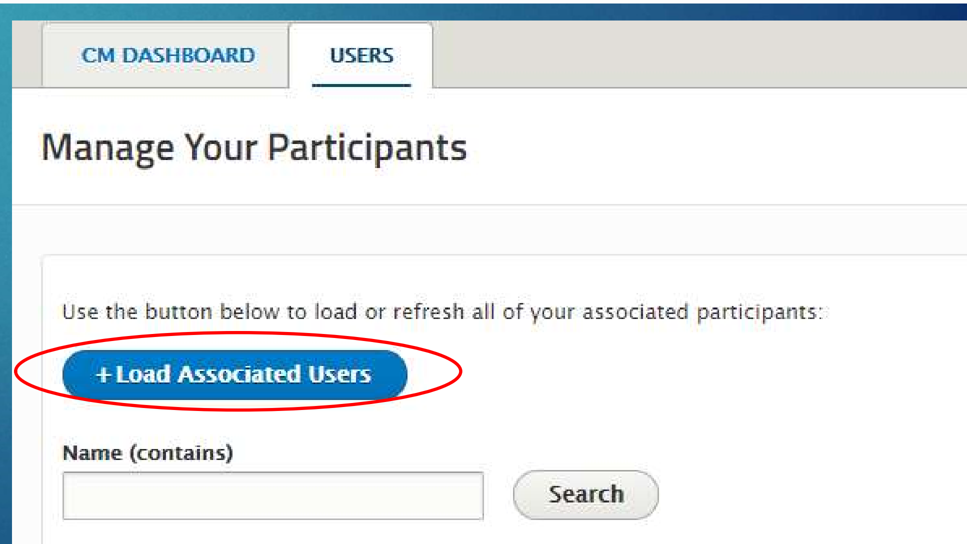
- Step 2: Follow the instructions contained in that email to confirm your account & reset your password (be sure to store your password in a secure location)
- Step 3: Once you have set your password, go to https://fa-pd-birch.annkissamprojects.com to log in to Participant Dashboard
- Step 4: If you 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

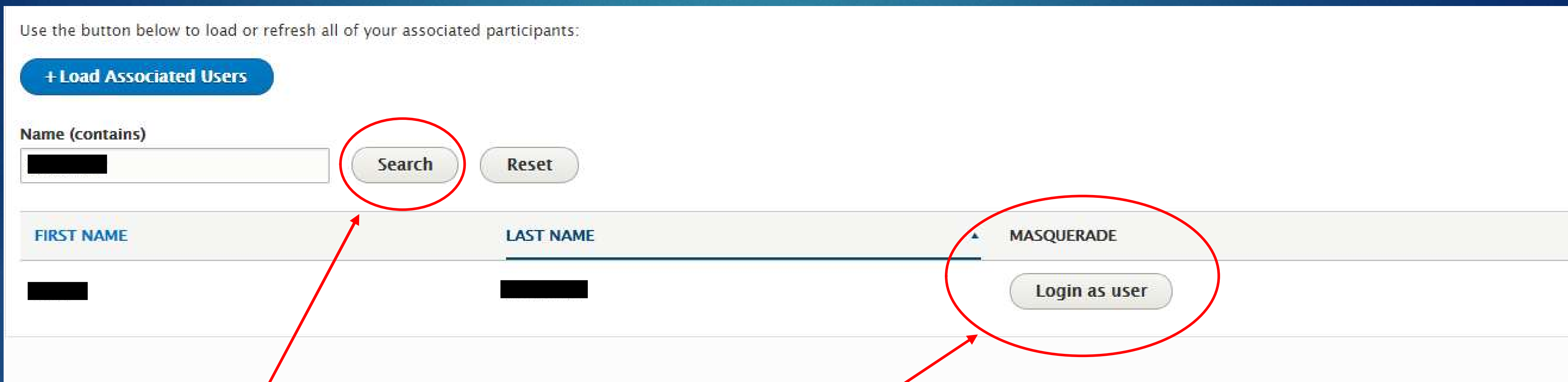
- When you log in as a Care Manager, you will need to select "users" to see a list of all of your active members.



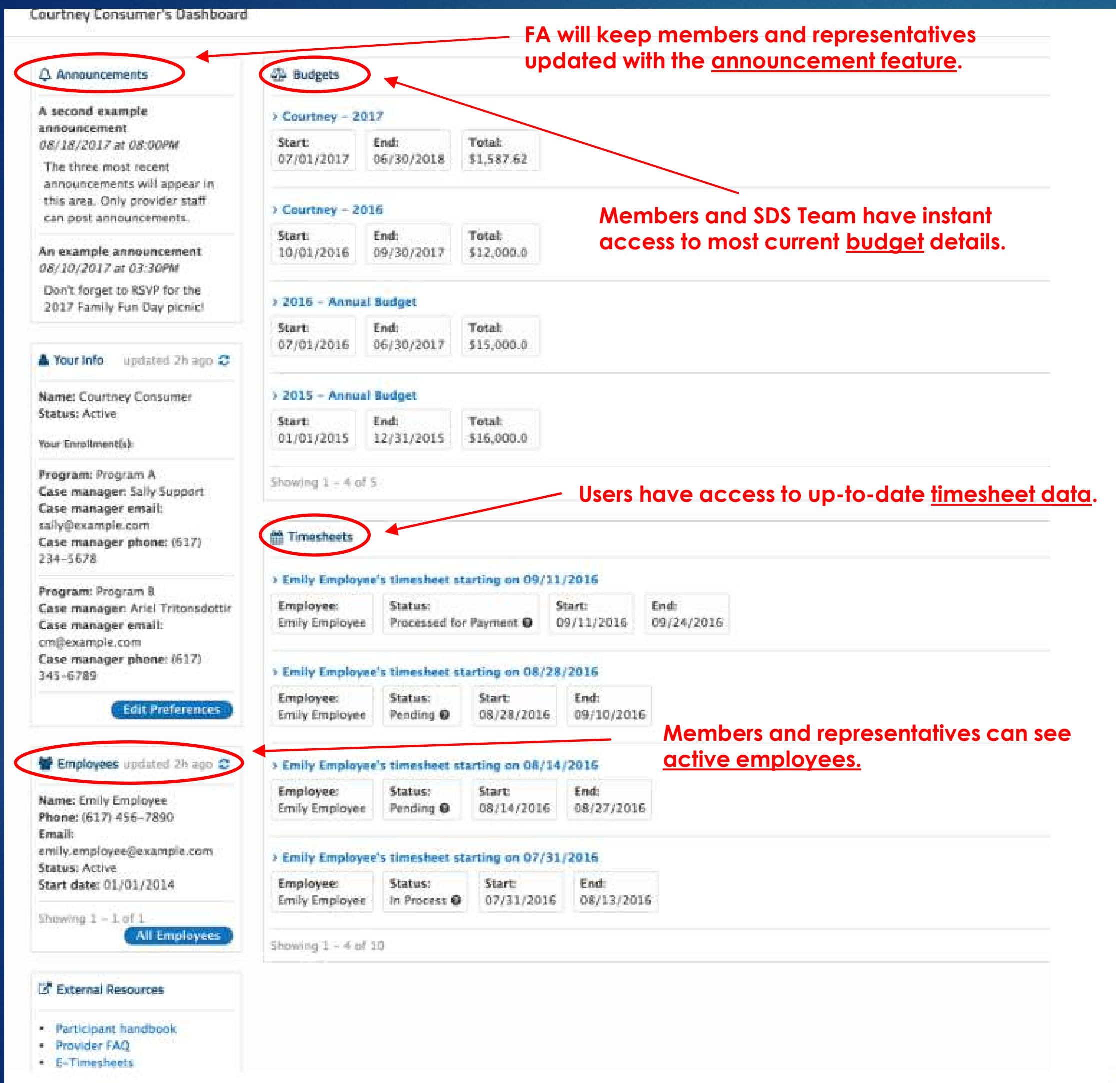
- Each time you log in, you should start your session by clicking the "Load Associated Users" button to make sure you have the most current list of your members.
  - The first time you log in, this may take a few extra minutes if you have a lot of active members.



Viewing Member Information

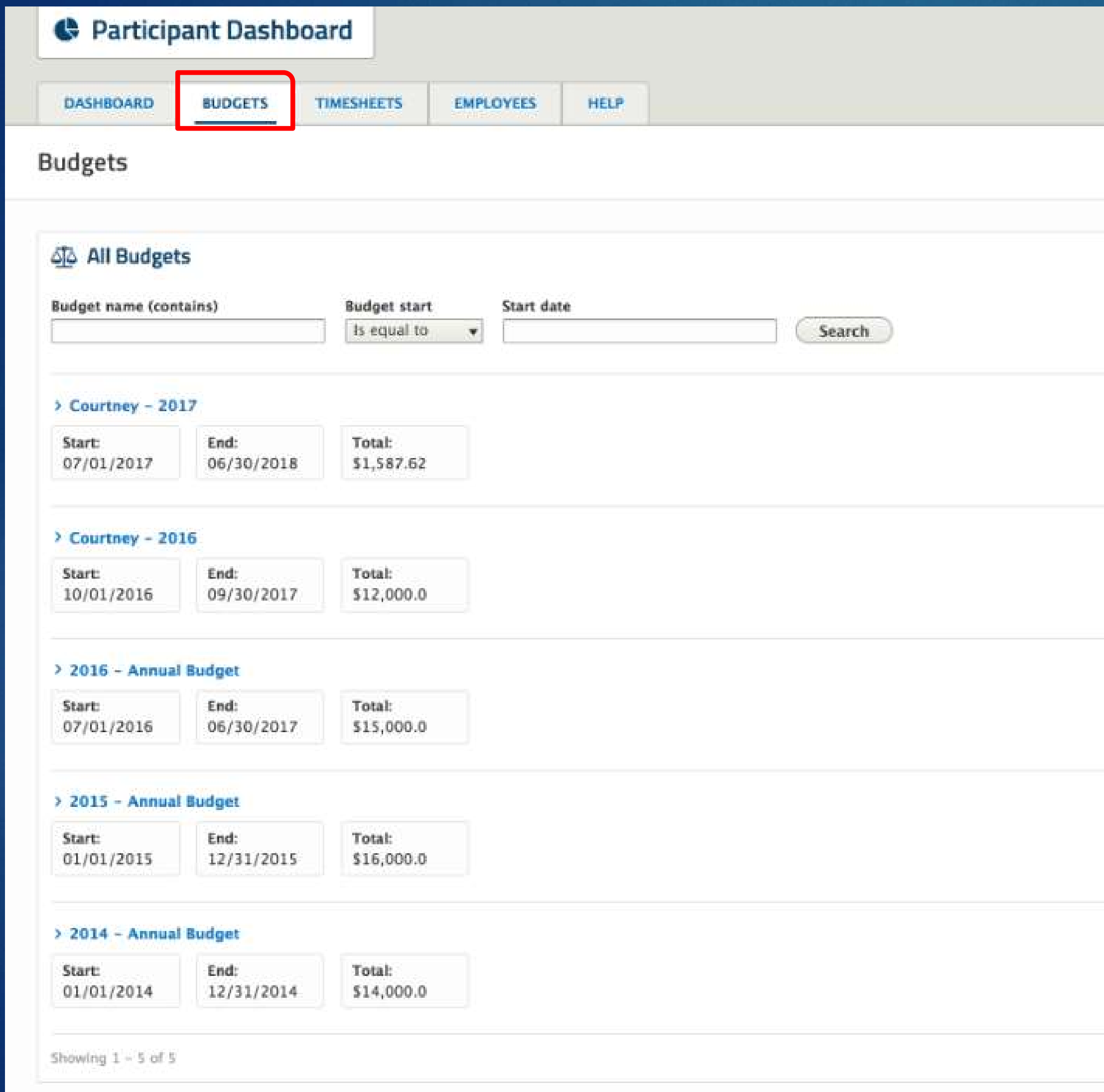


- To view a member's budget information, current timesheets, active and closed employees, and contact information, you simply search for the member. When you see the member's name on the search results, select "Login as user" using our Masquerade feature.



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.

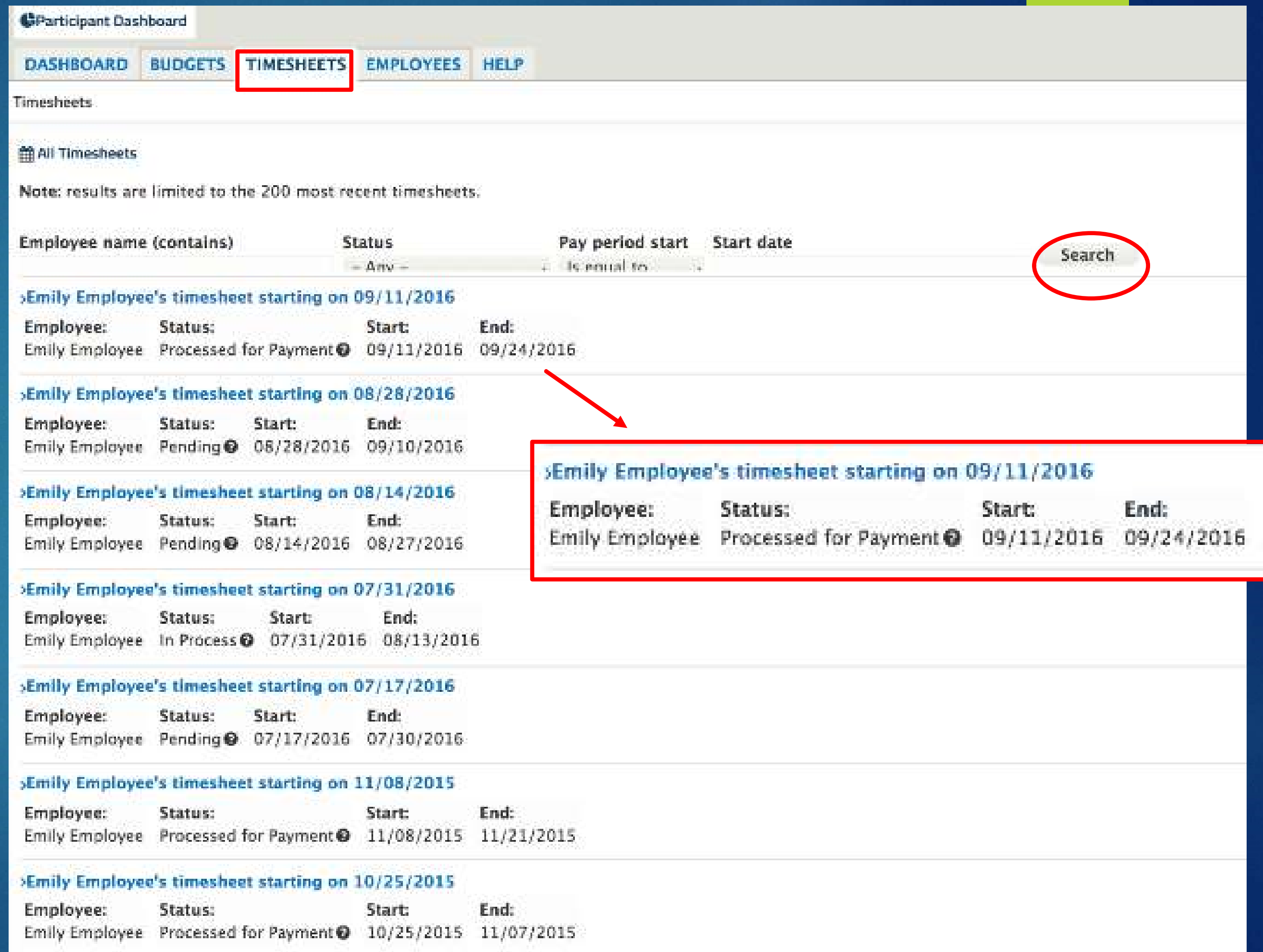


Budgets

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.

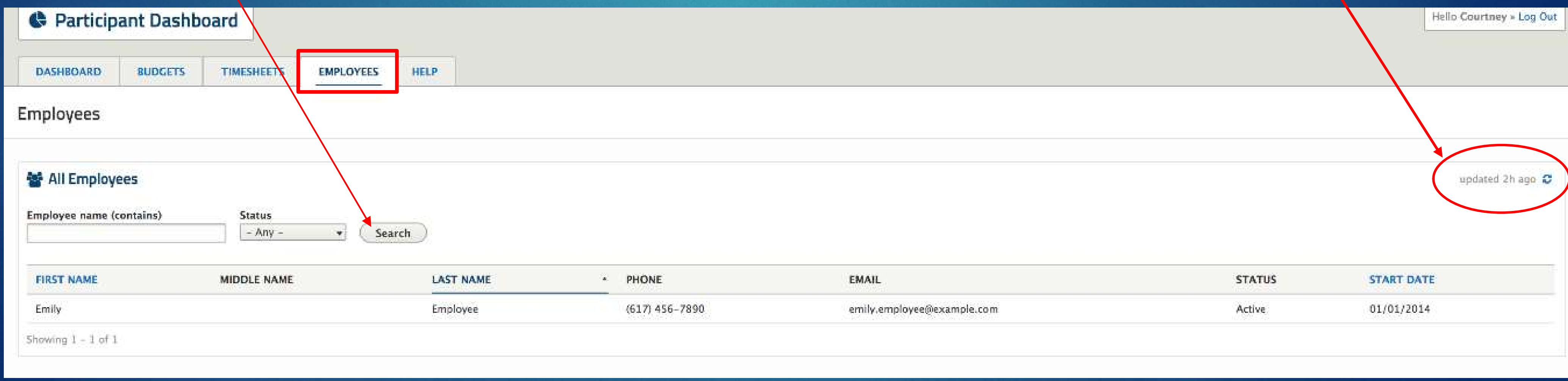


Employees

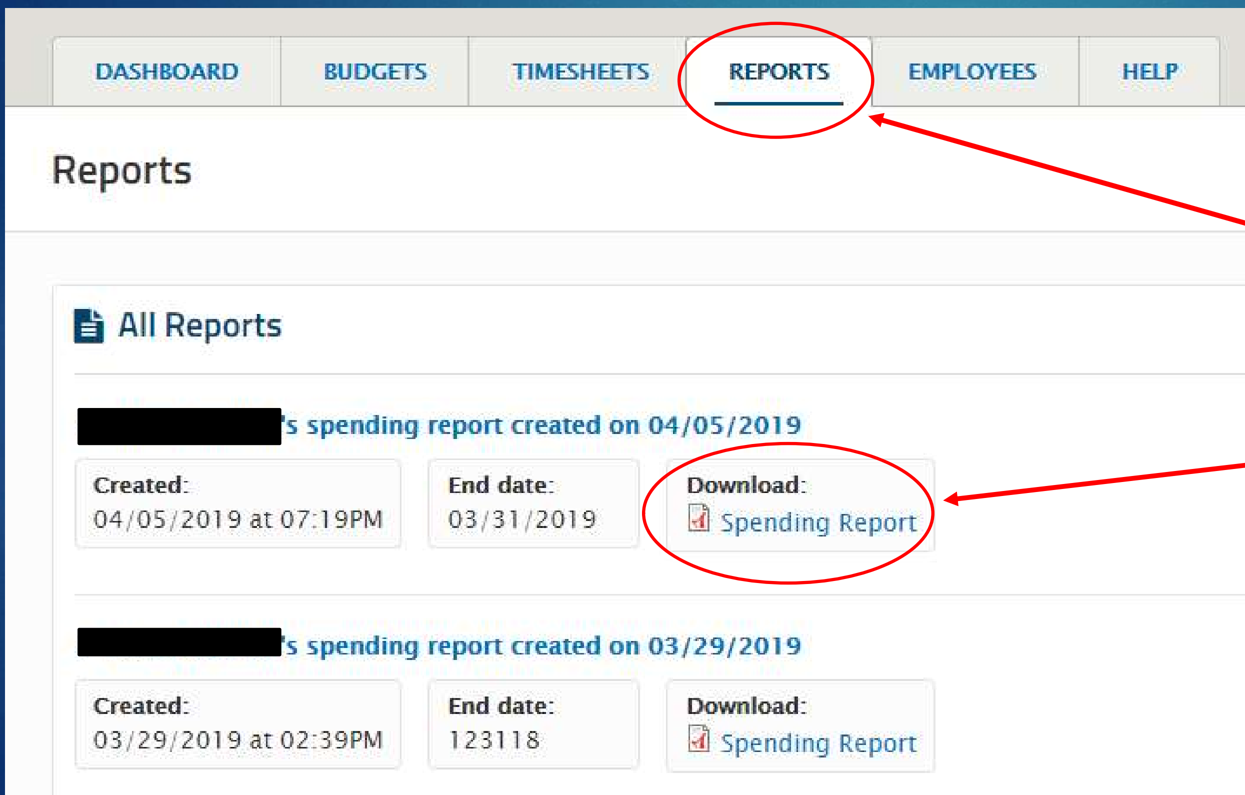
The search feature on each page allows users to quickly access information.

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.



Spending Reports



- 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:	[redacted]	PMI:	[redacted]
Agency:	**Care Wisconsin, CW First**	Budget Dates:	**1/1/19-12/31/19**
Program:	**Family Care**	Report Dates:	**1/1/19-3/31/19**

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Employee	Vendor /Expense	Service Date(s)	Rate /Cost	Hours /Units	Usage	Authorized Amount	Total Usage	Current Balance
						$2495.00	$646.22	$1848.78
[redacted]	--	12/30/18 - 1/12/19	$10.75	11.50	$123.63			
	--	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			

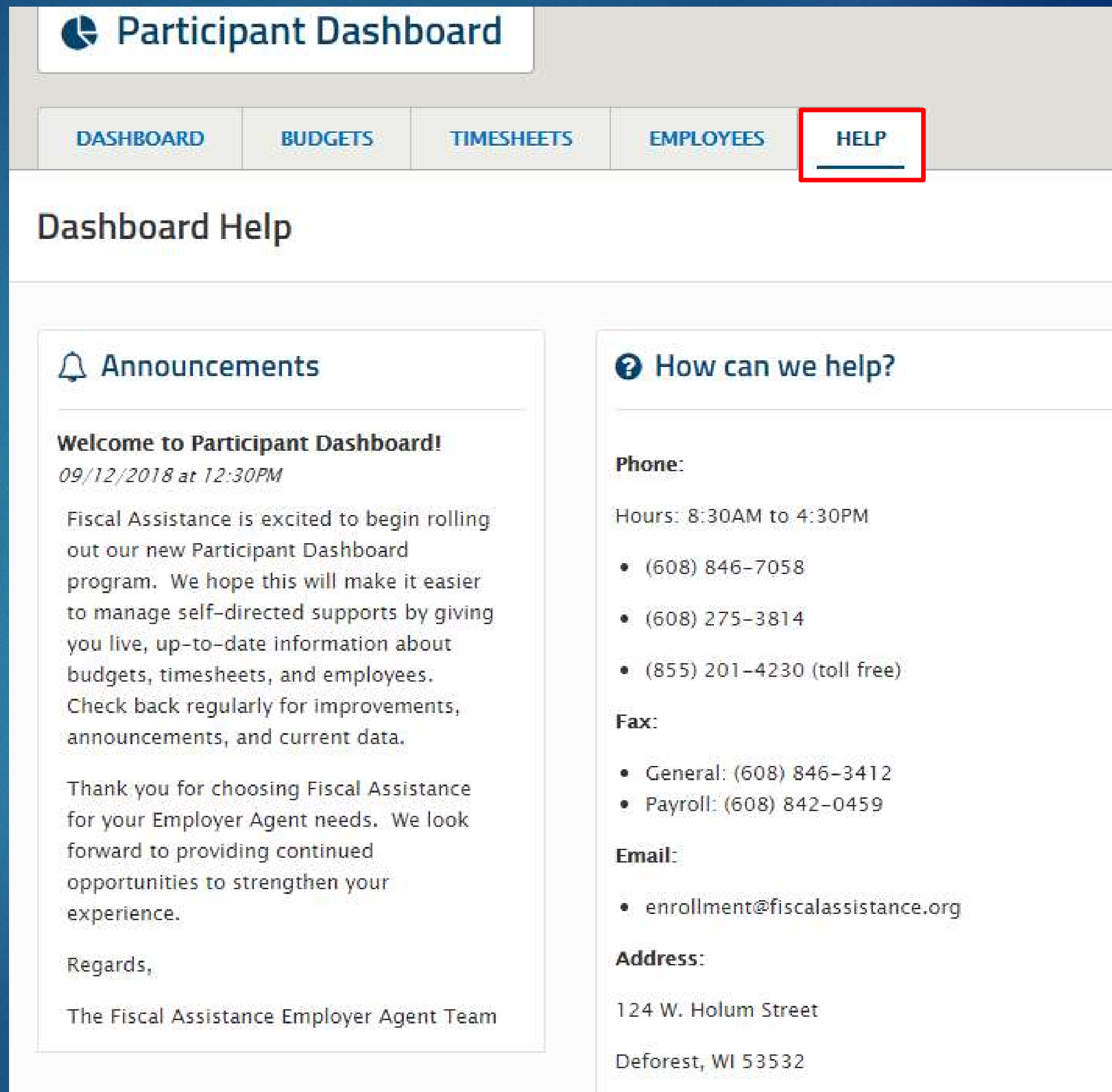
Last Payment Date	**4/5/19**
Usage as of last payment date	**24.4%**
Expected usage as of last payment date	**26.03%**
Total Budgeted Amount	**$2795.00**
Total Usage in Report Period	**-$682.42**
Current Budget Balance	**$2112.58**

*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.



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.