

## Guide to Entering Budgets in the BetterOnline™ Web Portal

1. Type in the following URL into your web browser: <http://fms.publicpartnerships.com>
2. Use this screen to log into the BetterOnline™ Web Portal.

### PPL Login

User Name:

Password:

Save Your User Name On This Computer

[Online User Registration](#)  
[Forgot Username or Password](#)  
[Download Adobe Acrobat Reader](#)

### PPL Overview

Public Partnerships, LLC (PPL) was established in 1999 as an affiliate of Public Consulting Group (PCG), a management consulting firm. PCG has been consulting to the public sector since 1986 and focuses on improving financial management and operations of publicly-funded health care, education, and human service programs. PCG employs 950 staff members in 31 offices across the U.S., in Montreal, Canada, and in Lodz, Poland, with experience in all 50 states. PPL was initially formed to provide assistance to the Robert Wood Johnson Foundation's national pilot demonstrations in Self-Determination. PPL offers a rich array of financial management and related administrative services to public agencies and participants seeking to develop consumer-directed services and supports. Currently, PPL serves more than 35,000 consumers in 20 states and the District of Columbia.

3. Select your program and role.

### Program and Role Selector

You have access to more than one program. Please select a program and role you want to use.

Program:

Role:

4. Once in the Portal, you will default to the “Participant Search Page”. To find a participant’s profile, enter any identifying search criteria to find the participant for whom you plan to create the authorization.

### Participant Search

Participant Last Name:

Participant First Name:

Participant PPL ID:

Medicaid ID:

SSN:

EIN Number:

Employer First and Last Name:

ILC Last Name:

Participant	Participant PPL ID	Medicaid ID	Birth Date	Good To Serve?	Employer of Record Name	Employer No	Independent Living Coordinator	Service Coordinator	Phone	Participant Profile	Authorization
TESTCONSUMEREH, QA	C000291	3333333333	12/16/1982	Yes	QA TESTCONSUMEREH	012345678	TESTLC_QATESTLC2		123-123-1234	<a href="#">Participant Profile</a>	<a href="#">Authorization</a>

5. Once the results of your search return, you will see a link to Authorization. Click on this link.

<a href="#">Participant Profile</a>	<a href="#">Authorization</a>
<a href="#">Participant Profile</a>	<a href="#">Authorization</a>



- This is the Budget Summary page for the participant you selected. Note that if this participant is new and does not have any budgets, you will see the screen in step #9. If there are already existing budgets and you see the screen below, verify that there is not currently a budget entered for the months you are planning to enter.

**Budget Summary for QA TESTCONSUMEREH (ID#C000291)**

Budget Period: 7/1/2013 - 7/31/2013

**Monthly Budgets:**

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail	Action
250000	9/11/2013	7/1/2013	7/31/2013	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
<b>Total Budget</b>				\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00		

- Click on the dropdown of the Budget Periods, so that you can see each of the budget periods that have been entered. These should coincide with the participants' annual assessments/plan year.

Budget Period: 11/1/2012 - 10/31/2013

12/1/2011 - 12/31/2011  
1/1/2012 - 10/31/2012  
**Monthly Budget 11/1/2012 - 10/31/2013**

- If the month or months of budgets that you would like to enter do not appear, click on the "Create New Budget Period" button.
- You will be brought to the page below, where you are being asked to enter Budget Amount, a Start Date, and an End Date. This is the screen you will see when entering any new participant's first budget. The start date will be the start of the participant's current plan year (or 10/1/13 if the plan year start date is before then) and the end date should be the last day of the last calendar month of the participant's current plan year. Note that you are entering the monthly budget amount.

Participant First Name: QA  
Participant Last Name: TESTCONSUMEREH  
Participant ID: C000291

Budget Amount:

Start Date:

End Date:

- Once entered, click continue.

Participant First Name: QA  
Participant Last Name: TESTCONSUMEREH  
Participant ID: C000291

Budget Amount: 3500

Start Date: 10/1/2013

End Date: 9/30/2014

11. You will see lines appear in the section called Monthly Budgets, one line for each month covered by this budget. The column titled “Allocated” will show \$0.00. You will need to approve authorizations for services within this monthly budget after they are created by the participant’s Independent Living Counselor (ILC).

**Budget Summary for QA TESTCONSUMEREH (ID#C000291)**

Budget Period: 10/1/2013 - 9/30/2014

**Monthly Budgets:**

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail	Action
1690000	9/24/2013	10/1/2013	10/31/2013	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1700000	9/24/2013	11/1/2013	11/30/2013	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1710000	9/24/2013	12/1/2013	12/31/2013	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1720000	9/24/2013	1/1/2014	1/31/2014	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1730000	9/24/2013	2/1/2014	2/28/2014	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1740000	9/24/2013	3/1/2014	3/31/2014	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1750000	9/24/2013	4/1/2014	4/30/2014	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1760000	9/24/2013	5/1/2014	5/31/2014	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1770000	9/24/2013	6/1/2014	6/30/2014	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	
1780000	9/24/2013	7/1/2014	7/31/2014	\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Budget Detail</a>	

Thank you for using this guide to successfully create budgets for your WORK participants!