

How to Read your Budget Summary

1. Log in to the PPL Web Portal using your pre-assigned username and password.
<https://fms.publicpartnerships.com/>

Program and Role Selector

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

Program: Role:

2. You will default on the “Timesheet List” page.

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STATE OF KANSAS | Work Opportunities Reward Kansans (WORK)

Budget Summary
Invoice
Participant View Timesheet
Contact Us

Timesheet List

3. Select the “Budget Summary” Hyperlink.

STATE OF KANSAS | Work Opportunities Reward Kansans (WORK)

Budget Summary
Invoice
Participant View Timesheet
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4. After selecting the “Budget Summary” feature the page with your budget information will appear.

Budget Period:

Monthly Budgets:

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail
11590000	2/14/2014	3/1/2014	3/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$484.41	\$731.58	Budget Detail
11600000	2/14/2014	4/1/2014	4/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11610000	2/14/2014	5/1/2014	5/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11620000	2/14/2014	6/1/2014	6/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11630000	2/14/2014	7/1/2014	7/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11640000	2/14/2014	8/1/2014	8/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11650000	2/14/2014	9/1/2014	9/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11660000	2/14/2014	10/1/2014	10/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11670000	2/14/2014	11/1/2014	11/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11680000	2/14/2014	12/1/2014	12/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11690000	2/14/2014	1/1/2015	1/31/2015	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11700000	2/14/2014	2/1/2015	2/28/2015	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
Total Budget				\$14,664.00	\$14,591.88	\$0.00	\$484.41	\$14,107.47	

Carryover Budget:

Id	Total Carryover	Authorizations	Approved Authorizations	Spent	Detail
920000	\$1,046.35	\$280.00	\$280.00	\$280.00	Budget Detail

5. **Budget Summary Page:**

- **Budget Period:** The budget period is entered by your managed care organization. Often, a budget period matches your assessment year. To view other budget periods, go to the budget period dropdown menu at the top of the screen:

Budget Period: 3/1/2014 - 2/28/2015
10/1/2013 - 2/28/2014
3/1/2014 - 2/28/2015

- **Monthly Budget:** The monthly budget is the amount of money that is available to be authorized for specific services for that month as determined by your annual assessment.
- **Carryover Budget:** The carryover budget contains the unspent funds from your monthly budget that have swept. This sweeping process occurs 45 days after the end of the month. For example, a participant’s November funds will sweep to carryover in mid-January, 45 days after November 30th.

6. **“Monthly Budget” Section:**

Monthly Budgets:

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail
11590000	2/14/2014	3/1/2014	3/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$484.41	\$731.58	Budget Detail
11600000	2/14/2014	4/1/2014	4/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11610000	2/14/2014	5/1/2014	5/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11620000	2/14/2014	6/1/2014	6/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11630000	2/14/2014	7/1/2014	7/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11640000	2/14/2014	8/1/2014	8/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11650000	2/14/2014	9/1/2014	9/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11660000	2/14/2014	10/1/2014	10/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11670000	2/14/2014	11/1/2014	11/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11680000	2/14/2014	12/1/2014	12/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11690000	2/14/2014	1/1/2015	1/31/2015	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
11700000	2/14/2014	2/1/2015	2/28/2015	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail
Total Budget				\$14,664.00	\$14,591.88	\$0.00	\$484.41	\$14,107.47	

The monthly budget breakdown screen displays 8 columns that you should pay attention to:

- **Creation Date:** This is the date that the managed care organization enters the budget period in portal.
- **Start:** This column is the first day that funds are available for that month.
- **End:** This column is the last day that funds are available for that month.
- **Amount:** This is the total amount of money that has been assessed for that month. You will see in the example that all months are the same.
- **Allocated:** This is the amount of money from the monthly budget that has been authorized for specific services.
- **Total Swept:** These are the unspent funds from your monthly budget that are moved to your carryover budget 45 days after the end of the month.
- **Spent:** This is the total amount of money you have spent for that month.
- **Balance:** This is equal to the amount allocated in your budget minus the amount spent in your budget.

- **Budget Detail:** The budget detail links to another page with further breakdown of your budget.
 - **To View Budget Detail:** Click on the “Budget Detail” Hyperlink

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail
11590000	2/14/2014	3/1/2014	3/31/2014	\$1,222.00	\$1,215.99	\$0.00	\$484.41	\$731.58	Budget Detail
11600000	2/14/2014	4/1/2014	4/30/2014	\$1,222.00	\$1,215.99	\$0.00	\$0.00	\$1,215.99	Budget Detail

- You will be taken to the Budget Detail page for the month that you chose. Here, you can view the authorizations that have been created for you. To view specific information about each authorization, click on the “Display Detail” icon in the Actions column.

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
PAS: Personal Assistant Services	AUL0006594	3/1/2014	3/31/2014	\$1,171.04	\$484.41	\$0.00	\$0.00	\$686.63		Timesheet Partially Submitted	
MONITOR: Emergency monitoring	AUL0006592	3/1/2014	3/31/2014	\$44.95	\$0.00	\$0.00	\$0.00	\$44.95		Approved	
Total:				\$1,215.99	\$484.41	\$0.00	\$0.00	\$731.58			

- You will be taken to the Authorization Detail page. Here, you can view detailed information about who created your authorizations and what payments it was used for.

Authorization Details			
Authorization Id:	AUL0006594	Unit Type:	Dollars
Service Type:	PAS: Personal Assistant Services	Line Total:	\$1,171.04
Participant Name:		Invoiced:	\$0.00
Participant Id:	C000042	Paid:	\$484.41
Date Range:	3/1/2014 - 3/31/2014	Remaining:	\$686.63
Last Modified:	2/14/2014 4:18:00 PM		
Date Created:	2/14/2014 3:02:00 PM		
Created By:	MHALL1		
Notes:			
Referral Status:	Approved		
Total Invoiced: \$0.00			
Total Paid: \$484.41 Show Detail			
Revision History: Show Revision			

7. How to read your **Carryover Budget:**

Carryover Budget:					
Id	Total Carryover	Authorizations	Approved Authorizations	Spent	Detail
920000	\$1,046.35	\$280.00	\$280.00	\$280.00	Budget Detail

- **Total Carryover:** Total amount of funds that have swept from your monthly budgets.
 - These funds can be authorized for special cases by your Independent Living and approved by your Care Coordinator.
- **Authorizations:** The funds that are allocated for specific services in your carryover budget by your Independent Living Counselor.
- **Approved Authorizations:** These are authorizations that have been approved by your Care Coordinator
- **Spent:** These are the funds that have been used to pay out timesheets and invoices. This does not include timesheets or invoices in good to pay status.

- **Detail:** The budget detail links to another page with further breakdown of your budget.
 - **To View Budget Detail:** Click on the Budget Detail Hyperlink

Carryover Budget:					
Id	Total Carryover	Authorizations	Approved Authorizations	Spent	Detail
920000	\$1,046.35	\$280.00	\$280.00	\$280.00	Budget Detail

- You will be taken to the budget detail page where you will be able to view the carryover authorizations that have been created for you. To view specific information about each authorization, click on the “Display Detail” icon in the Actions column.

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
OTHER: Other	AUL0004474	11/1/2013	11/30/2013	\$280.00	\$280.00	\$0.00	\$0.00	\$0.00	Authorized 280.00 from carryover to replace auth from November for wk emp support that was swept.	Paid	
Total:				\$280.00	\$280.00	\$0.00	\$0.00	\$0.00			

- You will be taken to the Authorization Detail page. Here, you can view detailed information about who created your authorizations and what payments it was used for.

Authorization Detail					
Authorization Details					
Authorization Id:	AUL0004474	Unit Type:	Dollars		
Service Type:	OTHER: Other	Line Total:	\$280.00		
Participant Name:		Invoiced:	\$0.00		
Participant Id:	C000042	Paid:	\$280.00		
Date Range:	11/1/2013 - 11/30/2013	Remaining:	\$0.00		
Last Modified:	1/15/2014 4:54:00 PM				
Date Created:	1/15/2014 4:42:00 PM				
Created By:	MHALL1				
Notes:	Authorized 280.00 from carryover to replace auth from November for wk emp support that was swept.				
Referral Status:	Approved				
Total Invoiced: \$0.00					
Total Paid: \$280.00 Show Detail					
Revision History: Hide Revision					
Start Date	End Date	Quantity	Status	Modified By	Modified Date
11/1/2013	11/30/2013	280.00	Approved	khyde1	1/15/2014 4:54:00 PM
11/1/2013	11/30/2013	280.00	Submitted	mhall1	1/15/2014 4:42:00 PM

If you have any questions, please contact Customer Service at 1-877-908-1747 or at pplks-unitedhealthcare@pcgus.com