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## Participant User Guide

### Portal 2.0

INTEGRITY - COMMUNITY - PROFESSIONALISM - RESPECT - EXCELLENCE - **SELF DETERMINATION**

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# The **new portal** is here with new tools and functionality.

This document walks you through accessing the portal, exploring the new features, and learning how everything works.

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# Sign In

To sign in to the portal, go to [portal.gtindependence.com](https://portal.gtindependence.com) on your browser.

- Enter your username and password, then select *Sign In*.
- Create a new account by selecting the *Create Account* link in the bottom right of the *Sign In* box.
- Recover a forgotten username or password for your existing account by selecting the *Forgot Username or Password* link in the bottom left of the *Sign In* box.

The image shows a screenshot of the GT Independence Sign In page. The page has a dark blue header with the GT Independence logo and tagline "Your life. Your choice.". Below the header is a white sign-in box. The box contains the title "Sign In", a "Username" input field, a "Password" input field with a toggle icon, a "Sign In" button, and two links: "Forgot Username or Password?" and "Create Account".

Sign in with your username and password

Recover your username or password

Create a new account

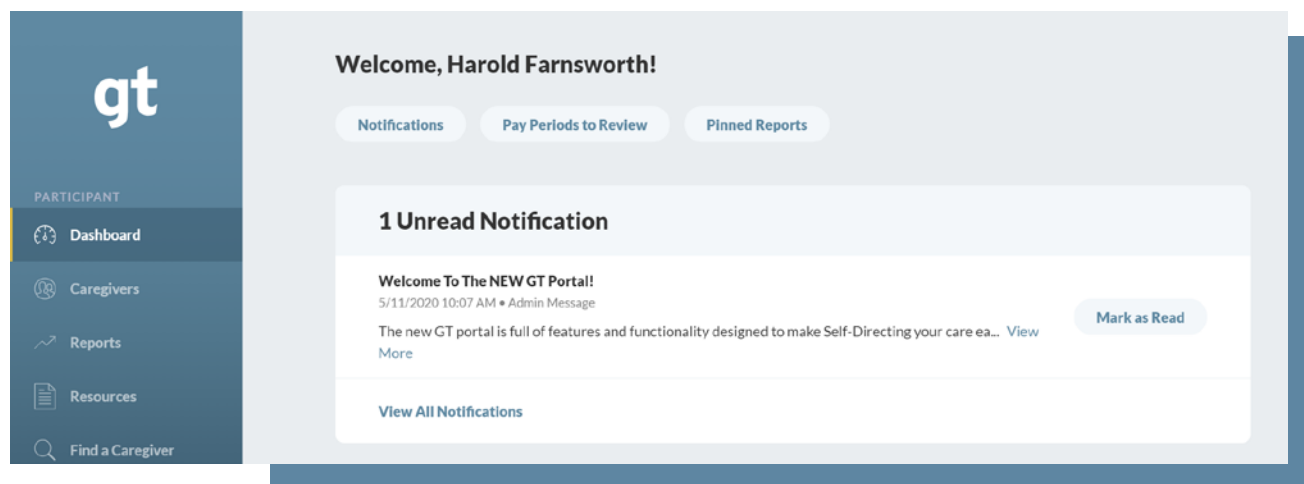
# Dashboard

After signing in, the portal dashboard appears. Using the dashboard, you can easily customize your account and access important information and action items.

## Notifications

The *Notifications* section on the dashboard displays messages sent to you from GT Independence or from your agency. Here are a few examples of notifications you might receive:

1. Informational messages
2. Links to resources or training documents
3. Important updates about self-directed services
4. Announcements and updates from GT Independence



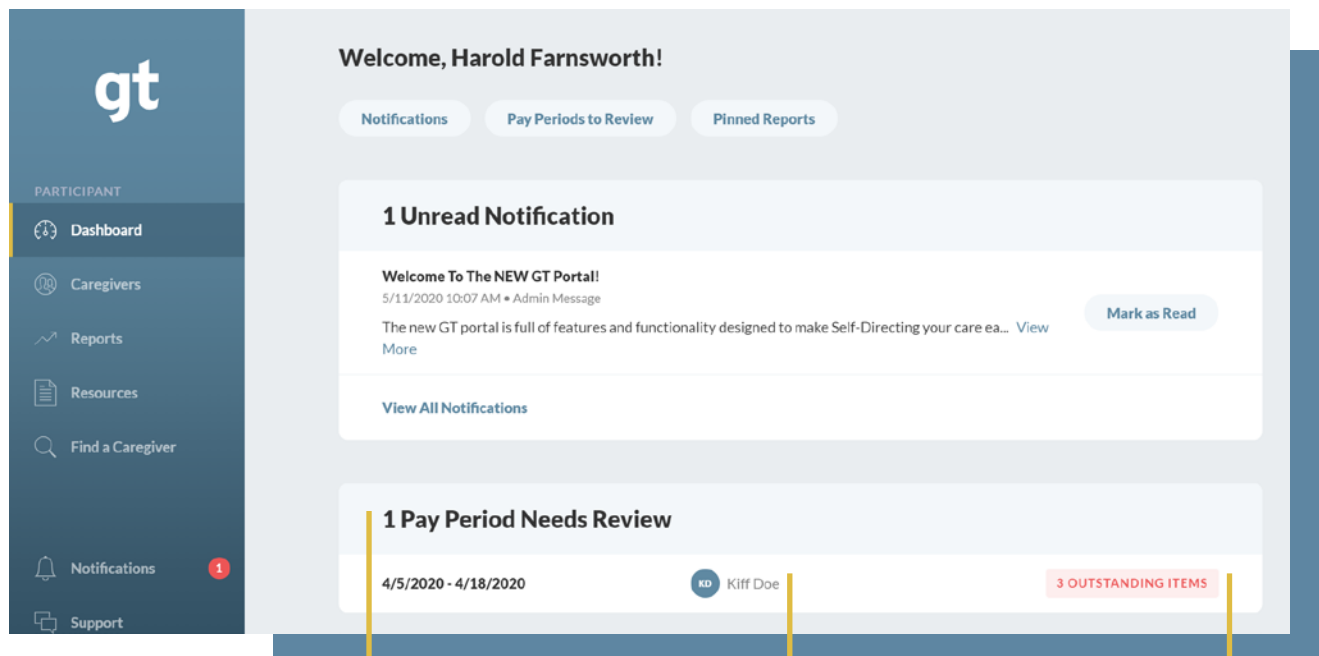
To clear notifications from your dashboard, select the *Mark as Read* button on the right side of the notification.

Once you mark a notification as read, it will no longer appear on your dashboard. To access notifications you marked as read, visit the *Notifications* tab on the navigation panel.

## Pay Period Review

In the *Pay Periods Needs Review* section of the dashboard, you can quickly see any time entries submitted by your caregiver that require correction or approval.

To review these pay periods, select a time entry. This opens the pay period view. Here you can approve time entries or request corrections from your caregiver.



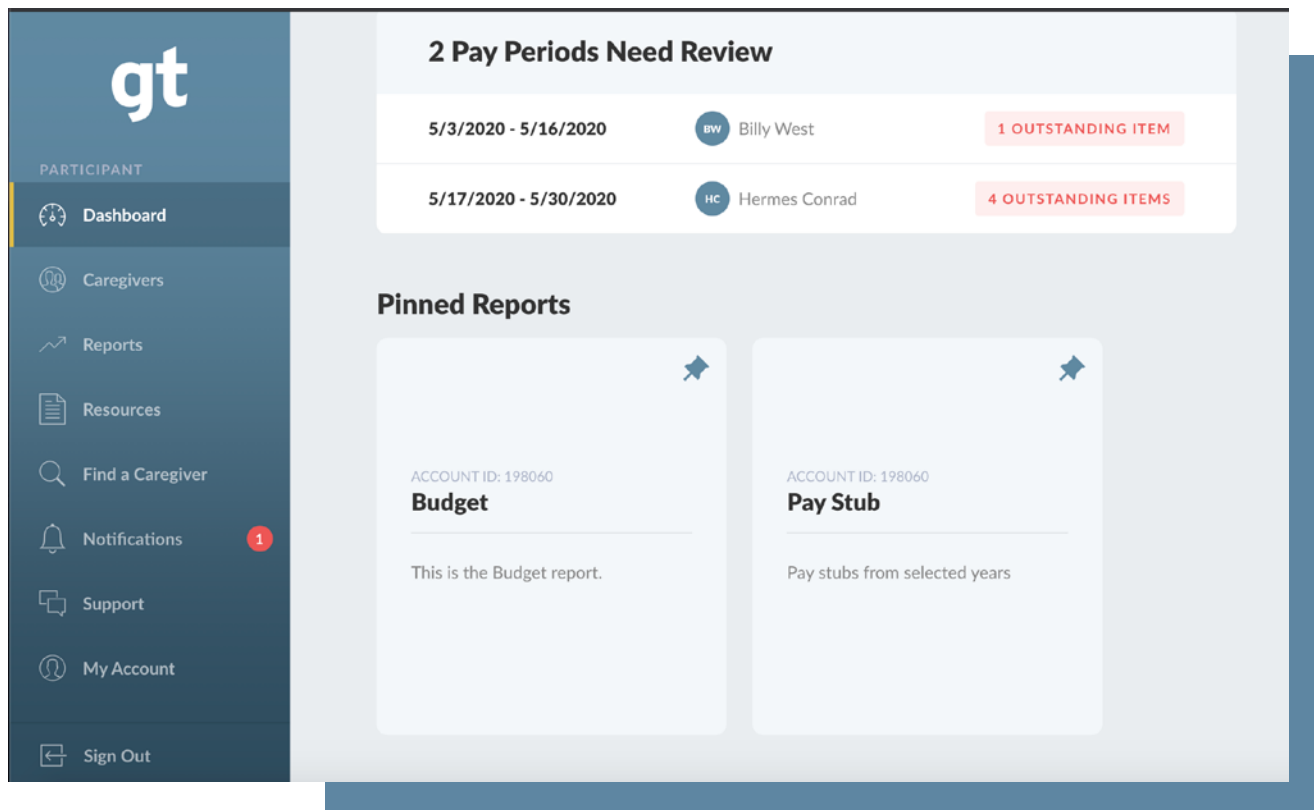
Pay periods that need  
your review

Name of the caregiver  
for the pay period

Amount of items in the  
pay period that need  
your review

## Pinned Reports

The last section of your dashboard is *Pinned Reports*. In this section, you can save your favorite reports to your dashboard for quick and easy access.



In the portal, you can access various report types and styles. Any report type and style can be pinned. Here are few examples of types and styles that you can pin:

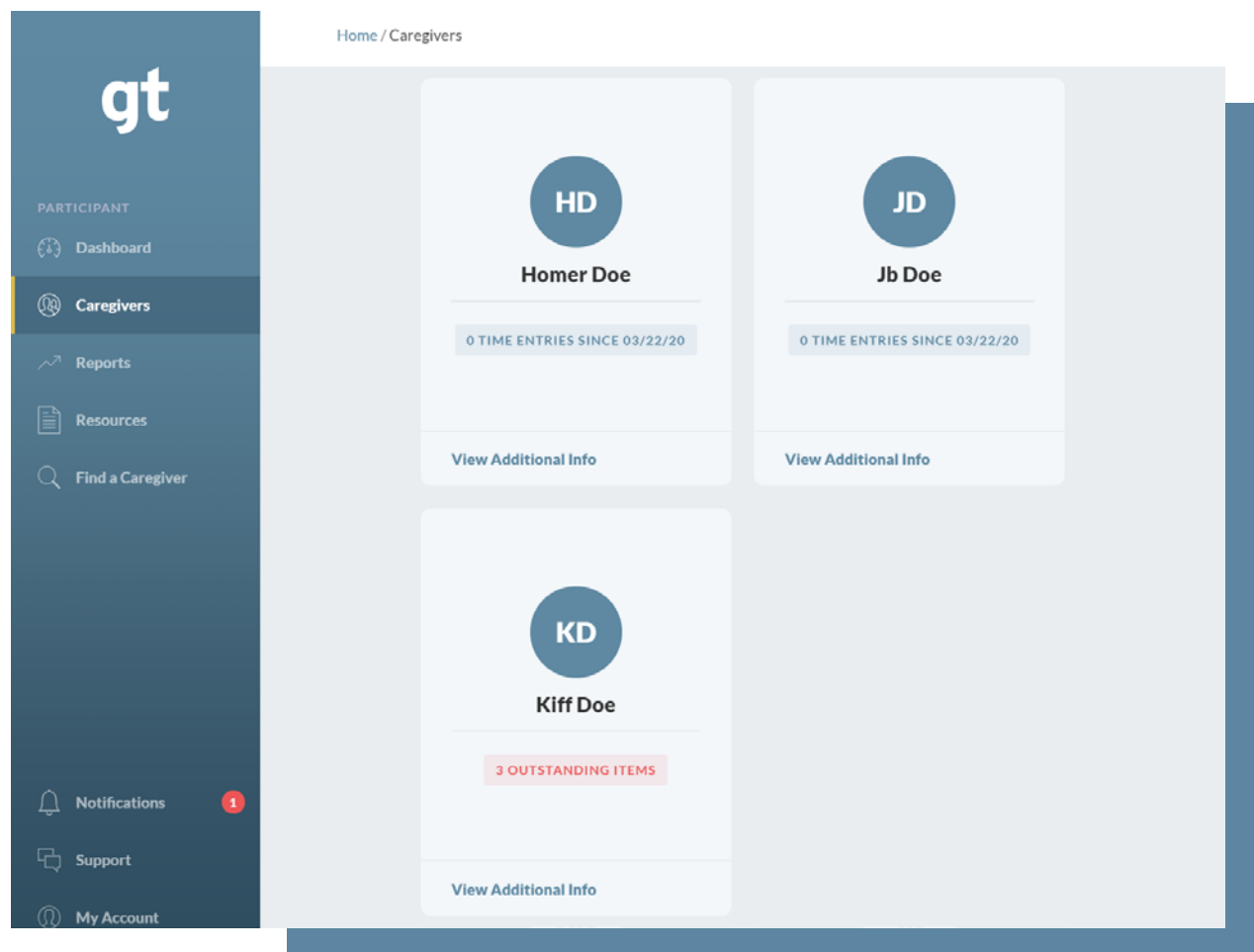
1. Budget reports
2. Employee pay stubs
3. W2s

# Caregivers

To view details on your caregiver staff, select the *Caregivers* tab in the left-side navigation.

## Caregiver Tiles

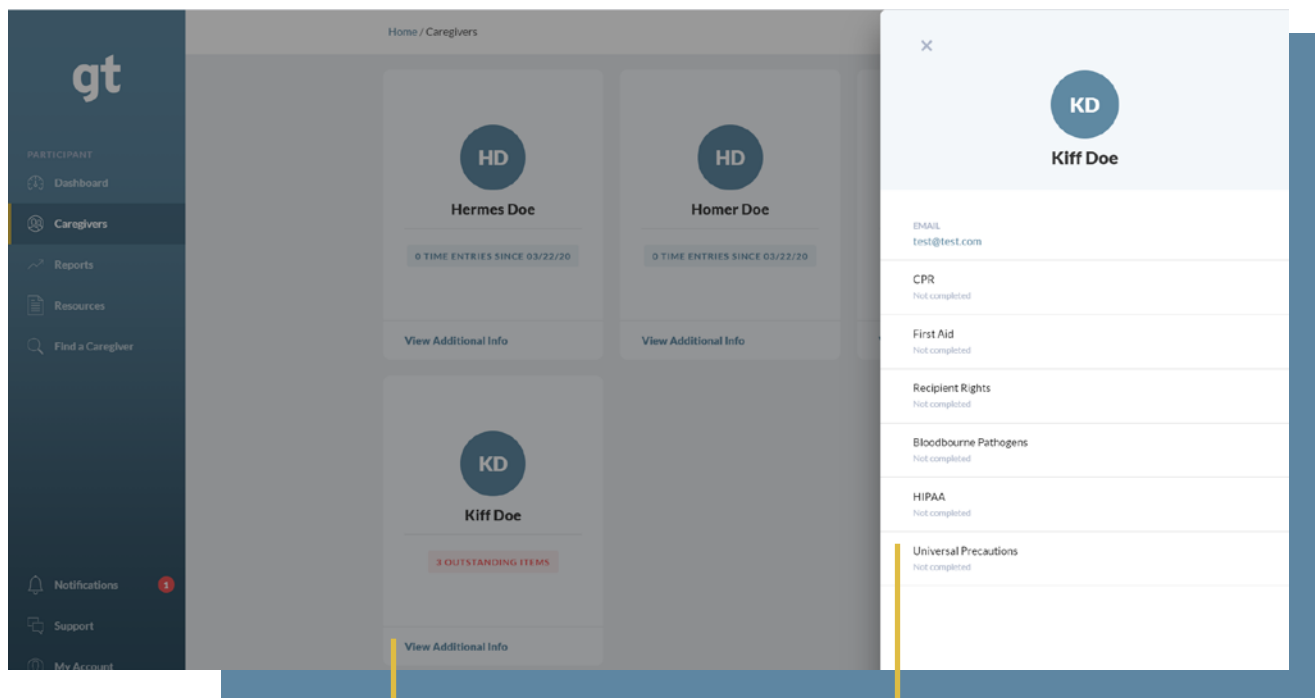
Each of your caregivers are represented by a caregiver tile. When selected, a tile gives you a brief summary of the caregiver's time entry activity and action items.



## Review Caregiver Details

To view more information on a caregiver, select the *View Additional Info* button on the bottom of each caregiver tile.

The button opens a panel that reveals more details about your caregiver, including training expirations and details on their criminal background check.



Select *View Additional Info* to see more details

Information about your caregiver's training



## Pay Period Summary

To see a pay period summary, select the caregiver's name on the caregiver tile. This opens the pay period summary view for that individual caregiver.

The screenshot shows the 'gt' (GreatTrails) interface. On the left is a dark blue sidebar with the 'gt' logo and a menu: PARTICIPANT, Dashboard, Caregivers (highlighted), Reports, Resources, Find a Caregiver, Notifications (with a red badge), and Support. The main content area has a breadcrumb 'Home / Caregivers / Kiff Doe'. Below this is a caregiver tile for 'Kiff Doe' with a circular icon containing 'KD'. The 'Pay Periods' section contains a table with the following data:

PAY PERIOD
5/3/2020 - 5/16/2020 0 Entries • 0 Hours
4/19/2020 - 5/2/2020 0 Entries • 0 Hours
4/5/2020 - 4/18/2020 3 Entries • 2 Hours
3/22/2020 - 4/4/2020 0 Entries • 0 Hours

A red badge '3 OUTSTANDING ITEMS' is positioned to the right of the third row. A link 'View All Pay Periods' is at the bottom of the table.

Here you can view time entry and pay period summaries. You can also easily see any outstanding action items that need your attention.

## Pay Period and Timesheet Review

To review a timesheet, select an individual pay period. This opens that pay period and displays the time entry details, the status, and any outstanding action items that require your approval.

Review items that need your approval

Get time entry update notifications

Home / Caregivers / Kiff Doe / 4/5/2020 - 4/18/2020

The time entry was updated successfully.

**KD Kiff Doe**

**PAY PERIOD**

2 Items Need Approval [Review All](#)

**4/5/2020 - 4/18/2020** 3 Entries 2 Hours

S M T W T F S S M T W T F S

5 6 7 8 9 10 11 12 13 14 15 16 17 18

**Sun, April 5** 3 Entries 2 Hours

**1:00 PM - 2:00 PM EDT** APPROVED BY PARTICIPANT

DHS

**5:00 PM - 5:30 PM EDT** NEEDS APPROVAL

H2015 - CLS Hourly Shared 3

**5:00 PM - 5:30 PM EDT** NEEDS APPROVAL

H2015 - CLS Hourly Shared 2

Easily overview timesheet entries

View the approval status on timesheets entries

## Approve or Reject Time Entries

To review, approve, or reject time entries for correction in bulk, select *Review All*. You can also approve or reject entries individually by selecting on the specific time entry.

Once completed, the caregiver will get a notification through their Caregiver app or portal account about your approval or rejection of their time entry.

The screenshot displays the Caregivers portal interface. On the left is a dark sidebar with the 'gt' logo and navigation links: PARTICIPANT, Dashboard, Caregivers (highlighted), Reports, Resources, Find a Caregiver, Notifications (with a red badge), Support, My Account, and Sign Out. The main content area shows the path 'Home / Caregivers / Kiff Doe / 4/5/2020 - 4/18/2020'. Below this is a header for 'KID Kiff Doe' and a 'PAY PERIOD' section indicating '2 Items Need Approval' for the dates '4/5/2020 - 4/18/2020'. A calendar view shows the date 4/5/2020 selected. Under 'Sun, April 5', three time entries are listed: '1:00 PM - 2:00 PM EDT' (DHS), '5:00 PM - 5:30 PM EDT' (H2015 - CLS Hourly Shared 3), and '5:00 PM - 5:30 PM EDT' (H2015 - CLS Hourly Shared 2). A modal window is open on the right, displaying details for the selected entry: '5:00 PM - 5:30 PM' (INDIANAPOLIS-EDT), 'H2015 - CLS Hourly Shared 3', and a red 'NEEDS APPROVAL' status. The modal includes 'SHIFT INFO' with fields for DATE (4/5/2020), TIME (5:00 PM - 5:30 PM), DURATION (0h 30m), PARTICIPANT (Harold Farnsworth), and SERVICE CODE (H2015 - CLS Hourly Shared 3). At the bottom of the modal are two buttons: 'Needs Correction' (red) and 'Approve' (blue). A note at the bottom right of the modal says '1 more entries'.

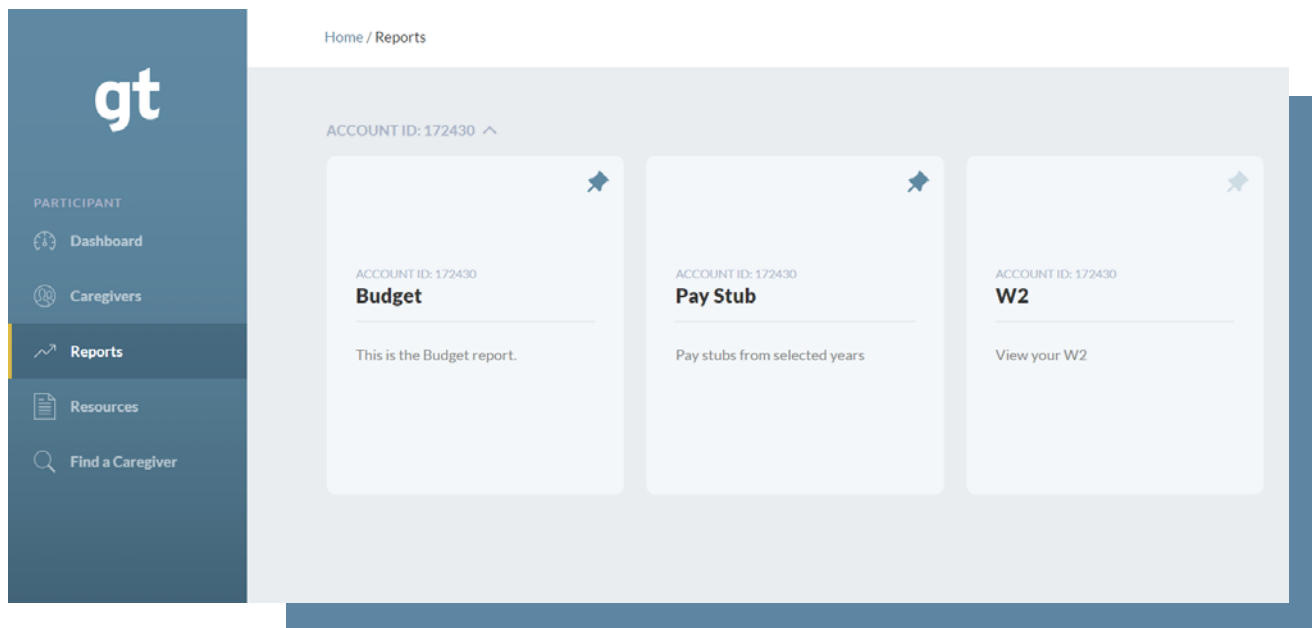
# Reports

To access available reports, select the *Reports* tab located in the left-side navigation. Here are a few examples of reports styles you can access:

- Budget reports
- Utilization reports
- Employee pay stubs
- W2s

## Pin a Report to Your Dashboard

Pinning a report to your dashboard lets you access it quickly. To pin a report, select the thumbtack icon located in the top-right corner of the report tile.



## Run a Report

To access a report, select the name of the report style you want to view. This opens the report and displays all the selected report's available months.

To filter the listed reports, use the start/end month parameters at the top of the page.

Home / Reports / Budget

Start month End month

ACCOUNT ID: 172430

### Budget

YEAR	MONTH	
2020	April	<div>PDF</div> <div>CSV</div> <div>HTML</div> <div>Run Report As ^</div>
2020	March	<div>Run Report As v</div>
2020	February	<div>Run Report As v</div>
2020	January	<div>Run Report As v</div>

To run the report, select the *Run Report As* button and choose the formatting style for the report.

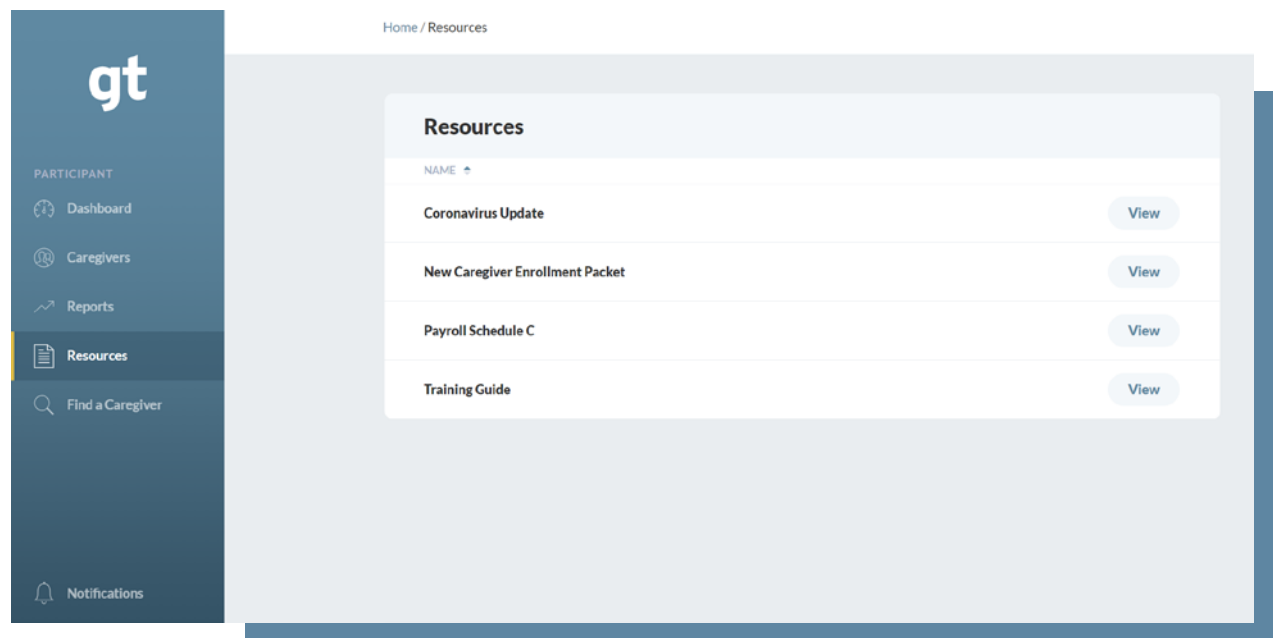
- PDF downloads a print-ready version of the report
- HTML opens the report for viewing in your web browser
- CSV downloads a version of the report that opens with spreadsheet software, like Microsoft Excel

# Resources

To access helpful and informational resources, select the *Resources* tab located in the left-side navigation. Here you can access all the resources uploaded by GT Independence or your agency.

Some information you might see in *Resources* includes:

- Crisis updates
- Forms
- Payroll schedules
- Training information



# Find a Caregiver

You can search our database of available caregivers by visiting the *Find a Caregiver* tab in the left-hand navigation. To search for available caregivers in your desired area, enter your zip code and radius. You can filter caregivers by languages spoken and select the information icon to view caregiver credentials.

The screenshot shows the 'Find a Caregiver' interface. On the left is a dark blue sidebar with the 'gt' logo and a 'PARTICIPANT' menu containing: Dashboard, Caregivers, Reports, Resources, **Find a Caregiver** (highlighted), Notifications, Support, My Account, and Sign Out. The main content area has a breadcrumb 'Home / Find A Caregiver' and a 'Download CSV' button. Below these are search filters: a search bar, 'Distance Away' with a dropdown arrow, and 'Zip Code' with a location pin icon. The title 'Find a Caregiver' is followed by the instruction 'Select a distance away and a valid zip code in order to find a caregiver.' Below this is a table with columns: NAME, DISTANCE, ZIP CODE, LANGUAGE (with a dropdown arrow), and ELIGIBILITY ITEMS. The table lists five caregivers: David Aldrich, Julie Amundson, Mariah Anderson, Deborah Antonopoulos, and Minerva Ayala. Each row has an information icon (i) in the last column. At the bottom, there is a pagination bar showing '1-10 of 5813', a page number '1' (highlighted) with navigation arrows, and a '10 Items' dropdown.

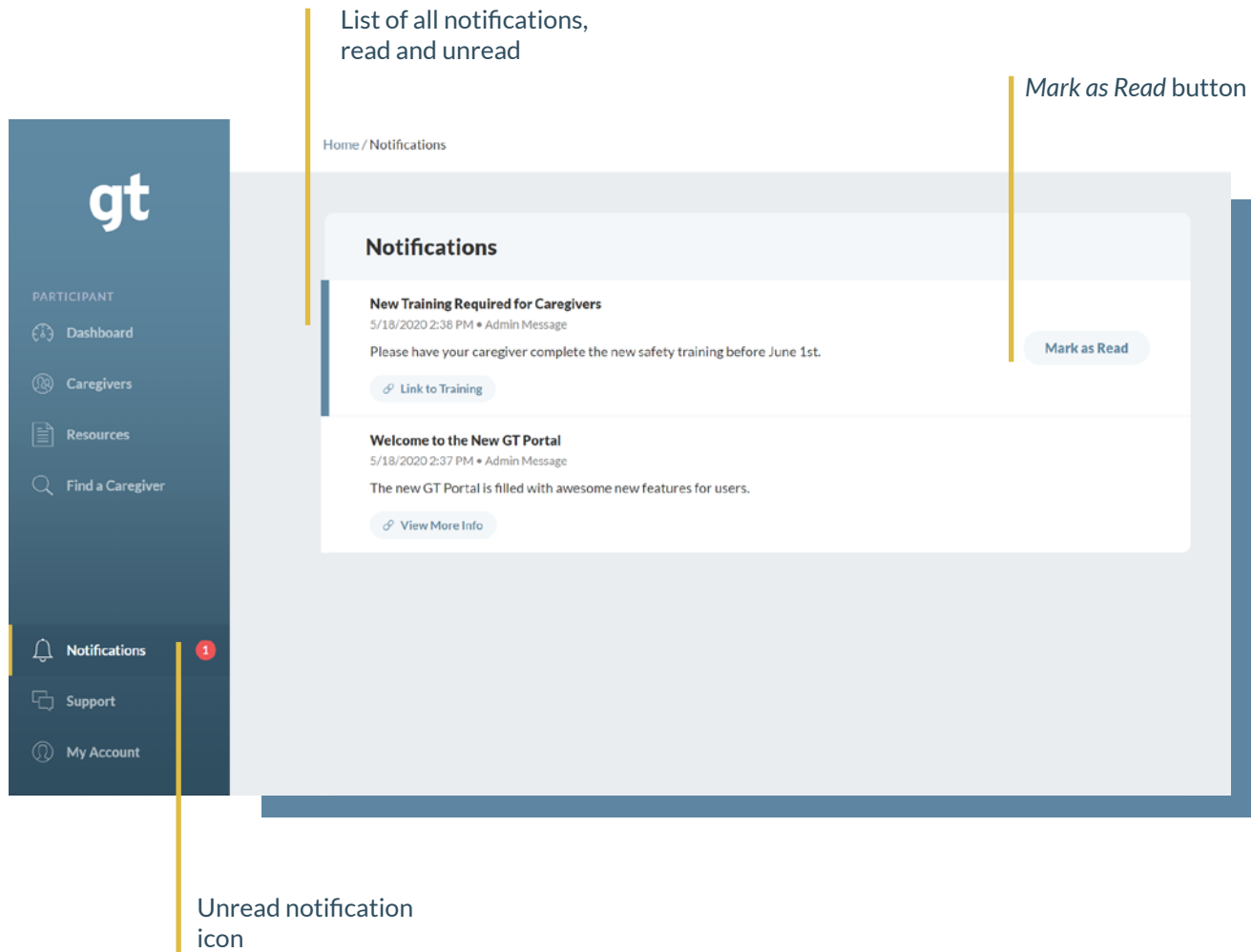
NAME	DISTANCE	ZIP CODE	LANGUAGE	ELIGIBILITY ITEMS
David Aldrich	--	34698	English	Criminal Record Check, CBC Waiver (if needed) ⓘ
Julie Amundson	--	54650	English	Criminal Record Check, CBC Waiver (if needed) ⓘ
Mariah Anderson	--	54601	English	Criminal Record Check, Training Record, 1 More ⓘ
Deborah Antonopoulos	--	32119	English	-- ⓘ
Minerva Ayala	--	33062	English	-- ⓘ

## Legal Notice

*Find a Caregiver is a courtesy service that GT Independence provides to individuals we serve. Caregivers should not be contacted for any purpose other than recruiting for caregiver services. Appearing on this list should not be considered an endorsement of the caregiver by GT Independence, and it is your sole responsibility to assess the skills and capabilities of the caregiver.*

# Notifications

Access all your notifications by visiting the *Notifications* tab in the left-side navigation. Unread notifications appear on both your dashboard and the *Notifications* tab.



Once you mark a notification as *read*, it will no longer appear on your dashboard. To access all read and unread notifications, go to the *Notifications* tab.



# Support

GT Independence has an entire customer service team dedicated to helping you solve any problems you encounter with the portal.

To get support, select the *Support* tab in the left-side navigation, and send a message straight from the portal. You can even customize the response that works best for you.

The screenshot displays the GT Independence portal interface. On the left is a dark blue sidebar with the 'gt' logo at the top. Below the logo, the 'PARTICIPANT' section includes links for 'Dashboard', 'Caregivers', 'Resources', and 'Find a Caregiver'. Further down are 'Notifications' (with a red badge showing '1'), 'Support' (highlighted with a yellow bar), 'My Account', and 'Sign Out'. The main content area is light gray and features a white 'Support' form. The form has a title 'Support' and a text input field for 'What do you need help with?' (0 / 500). Below this is a question 'How would you like us to contact you?' with three radio button options: 'Phone', 'Email', and 'Do not contact'. Another question 'When is the best time to contact you?' has three radio button options: 'Morning', 'Afternoon', and 'Evening'. At the bottom of the form is a 'Message' text input field (0 / 500) and two buttons: 'Cancel' and 'Submit'.

# My Account

To view and update your portal account information and your demographic information, select the *My Account* tab in the left-side navigation.

- Update your account information by selecting the *Change* button on the right side of the information you want to change. Information you can update includes your username, email, password, and language preferences.
- Update your demographic information by selecting the pencil icon at the top-right of the demographics section. You will be automatically directed to a secure form to update your information.

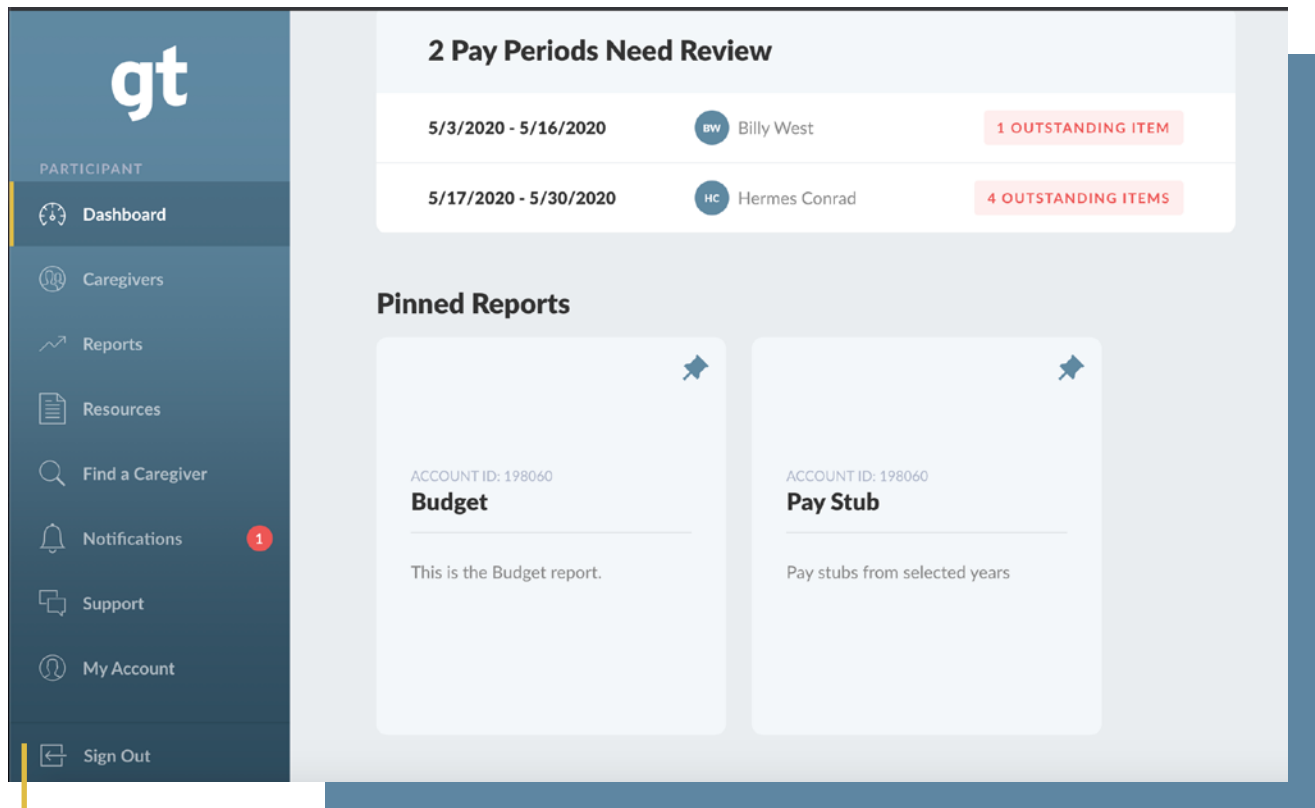
The screenshot displays the 'My Account' page of the 'gt' portal. On the left is a dark blue sidebar with the 'gt' logo and navigation links: PARTICIPANT, Dashboard, Caregivers, Resources, Find a Caregiver, Notifications (with a red badge), Support, My Account (highlighted), and Sign Out. The main content area has a light blue header with a circular profile icon containing 'HF' and the name 'Harold Farnsworth'. Below this are two sections: 'Account Information' and 'Demographics Information'. The 'Account Information' section lists fields: USERNAME (BKDemo), EMAIL (maestroqa+bldemo@gmail.com), PASSWORD (masked with dots), TIMEZONE (New York), and LANGUAGE (English), each with a 'Change' button on the right. The 'Demographics Information' section is marked as 'PRIMARY' and includes a pencil icon for editing. It lists: LEGAL NAME (Harold Farnsworth), ACCOUNT ID (198060), EMAIL (maestroqa+bldemo@gmail.com), BIRTHDAY (4/1/1990), and ADDRESS (215 Broadus Street, Sturgis, MI 49091).

Account Information	
USERNAME	BKDemo
EMAIL	maestroqa+bldemo@gmail.com
PASSWORD	*****
TIMEZONE	New York
LANGUAGE	English

Demographics Information	
LEGAL NAME	Harold Farnsworth
ACCOUNT ID	198060
EMAIL	maestroqa+bldemo@gmail.com
BIRTHDAY	4/1/1990
ADDRESS	215 Broadus Street, Sturgis, MI 49091

# Sign Out

When you're done on the portal, sign out of your account by selecting the *Sign Out* button at the bottom of the left-side navigation.



Sign Out button



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Updated July 2020