



IDD Case Management System Providers User Guide



D·B·H·D·D



IDD Connects

Provider

Disclaimer: Please note that screens used in this presentation are for demonstration purposes only and actual content may vary.





Introduction

The user guide for the IDD Connects System describes how a specific user will interact with the system based upon their role. This guide helps the user understand how to perform tasks and navigate through the system. Each task includes step by step instructions with the accompanying screenshot taken from the IDD Connects System and a description of the screen.

Providers can access the IDD Connects System via a single sign-on (SSO) from Provider Connect to the IDD Connects System or by logging in to the IDD Connects System directly. Providers must sign-on to the IDD Connects System through the SSO process for the first log in to the IDD Connects System. Upon the first login, you will be prompted to establish your IDD Connects System account information.

Each provider needs to complete the Account Request Form (ARF) in order to obtain log in credentials to access Provider Connect. Subsequently, the User will also be linked to the IDD Connects Portal. The User can either use the link below, step 4, or access the Georgia Collaborative ASO [Website](#):

1. Click on the Provider Tab.
2. Click on the Forms Tab.
3. Scroll to Provider Connect Forms
4. Click on Online Services [Account Request Form](#) for Georgia Providers.
5. Use the [Account Request Form sample](#) to complete form and FAX to 1 866 – 698 – 6032 or email e-support.Services@beaconhealthoptions.com
6. You will receive log in credentials via email, and IDD Connects Portal access will be linked to sign on.

Note: The Provider is also able to access the IDD Connects portal independent of Provider Connect.

ProviderConnect Overview

ProviderConnect is an easy-to-use online application that providers can use to complete everyday service requests. Providers have the ability to access information 24 hours a day/7 days a week.

Providers can use ProviderConnect to:

- Obtain information about member eligibility and benefit status
- Search claims and authorizations
- View and print correspondence
- Submit EDI claims and inquiries to the Beacon Health Options Customer Service Department
- Send messages to and receive messages from Beacon Health Options

- Attach documents

In addition, ProviderConnect contains links to other resources such as:

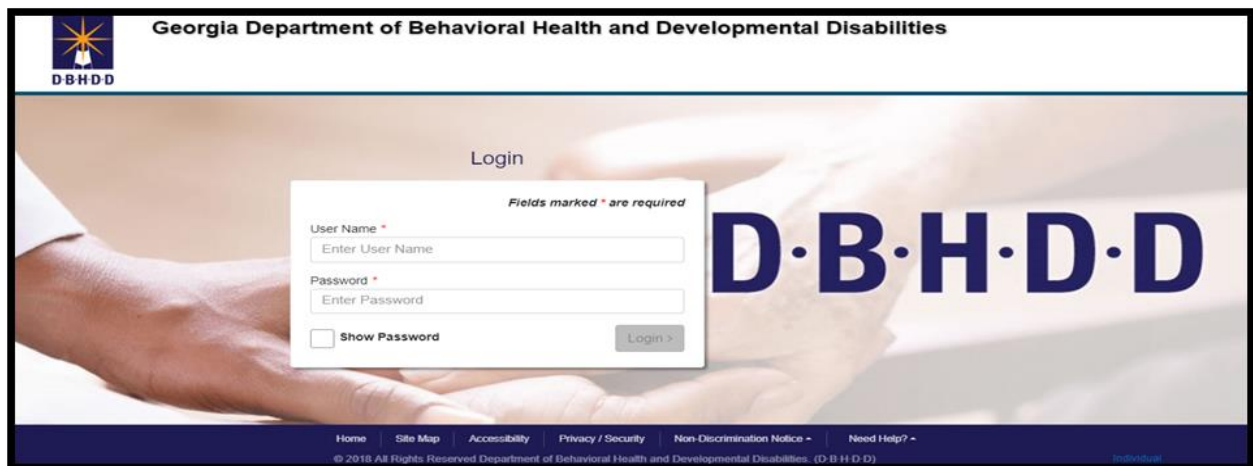
- Compliance
- Provider Handbook
- Forms
- Network Specific Information

User Role: Provider

Below are the steps that describes how a Provider User logs into the IDD Connects portal for the IDD Case Management System and is navigated to the user's Dashboard. The Dashboard displays the User's Tasks, Notifications and Messages. The URL for Providers in IDD Connects <https://idd.georgiacollaborative.com/IDDPortal/provider>

1.1 User Logs In

- Step 1: Launch Google Chrome web browser ((i.e. Google Chrome, Safari, Fire Fox, and Internet Explorer).
- Step 2: Enter URL in the search bar and clicks enter to open the DBHDD Login page.
- Step 3: Enters Username and Password in the DBHDD portal.
- Step 4: Click [Login](#).



Georgia Department of Behavioral Health and Developmental Disabilities

DBHDD

Login

Fields marked * are required

User Name *

Enter User Name

Password *

Enter Password

Show Password

Login >

Home Site Map Accessibility Privacy / Security Non-Discrimination Notice - Need Help? -

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Figure 1: IDD Connects System

1.2 Reset Password/Forgot Password/Forgot Username

- Step 1: User logs in DBHDD portal.
- Step 2: User enters incorrect Username/Password.
- Step 3: System displays an error message. User clicks on forgot password link.

- Step 4: User enters registered email address.
- Step 5: System sends an email to reset password.
- Step 6: Click on link in the email will re-direct the User to IDD portal where he/she can create password.

(Note: If after three unsuccessful login attempts, the system will lock the account of the User. In this case, User should contact the respective System Admin to get account unlocked.)

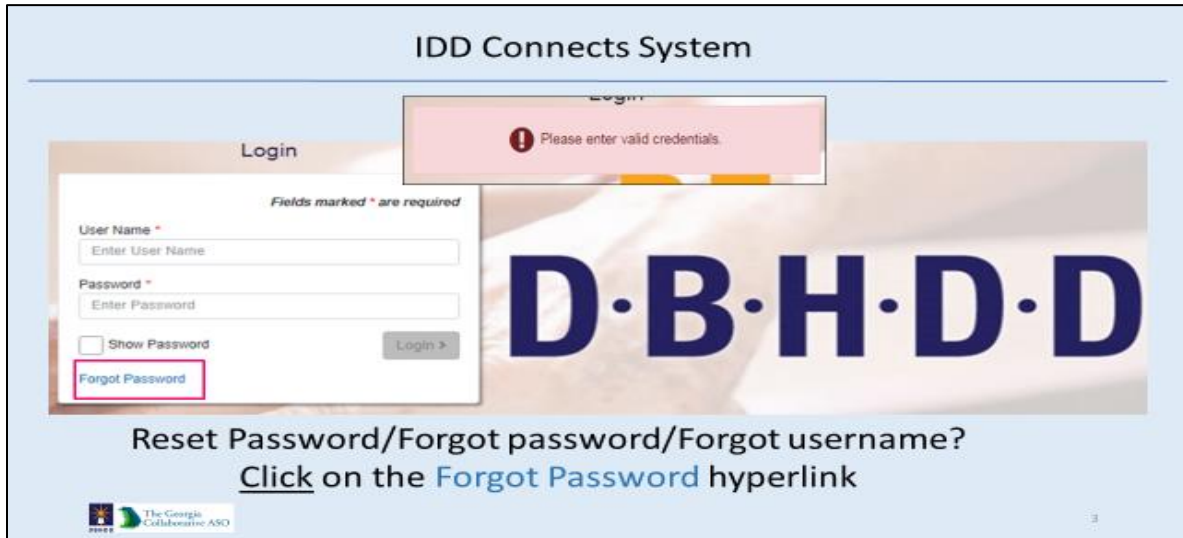


Figure 2: IDD Connects System Login Page

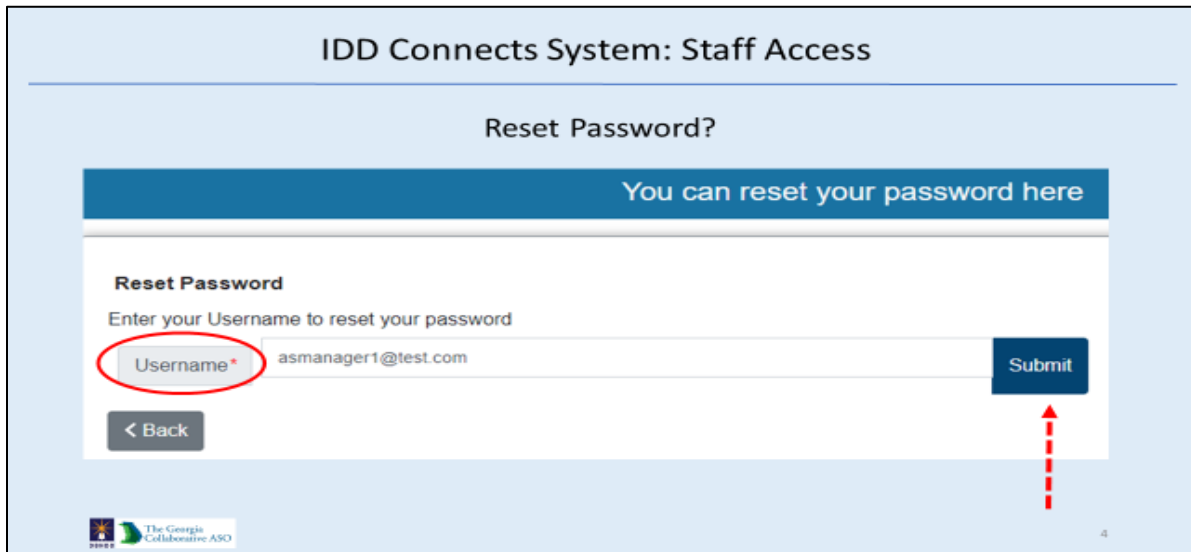


Figure 3: Reset Password

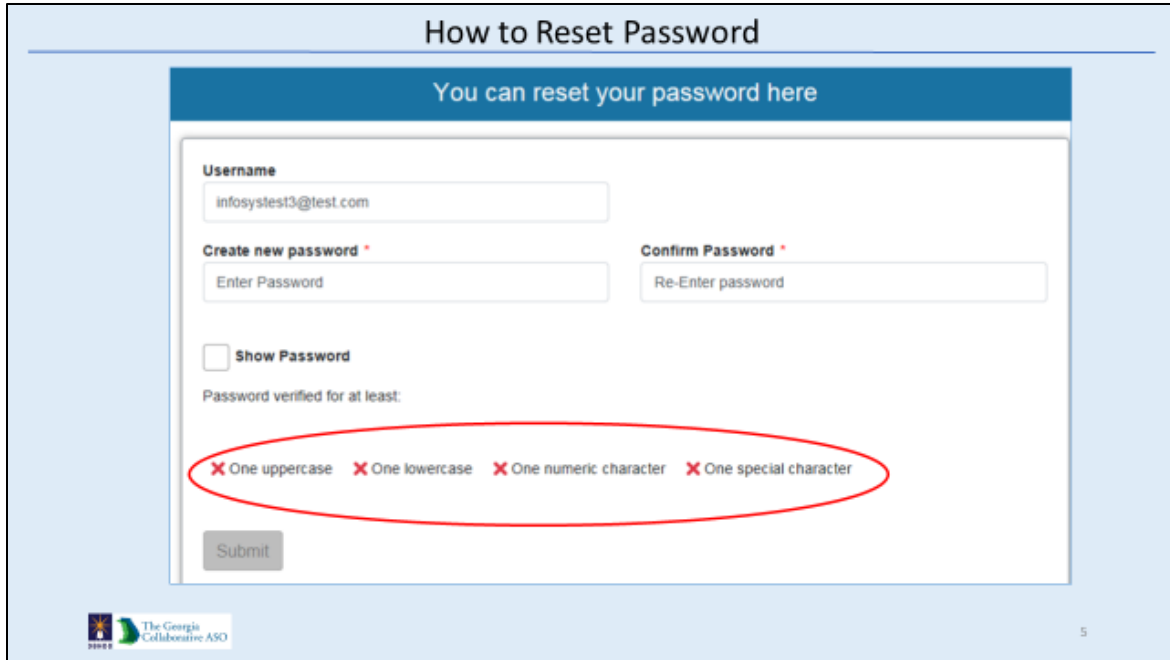


Figure 4: Reset Password Page

1.3 Dashboard

- Step 1: After Logging into the system, the [Dashboard](#) displays by default.
- Step 2: To search a particular task, click on the [Open Tasks](#) tile.

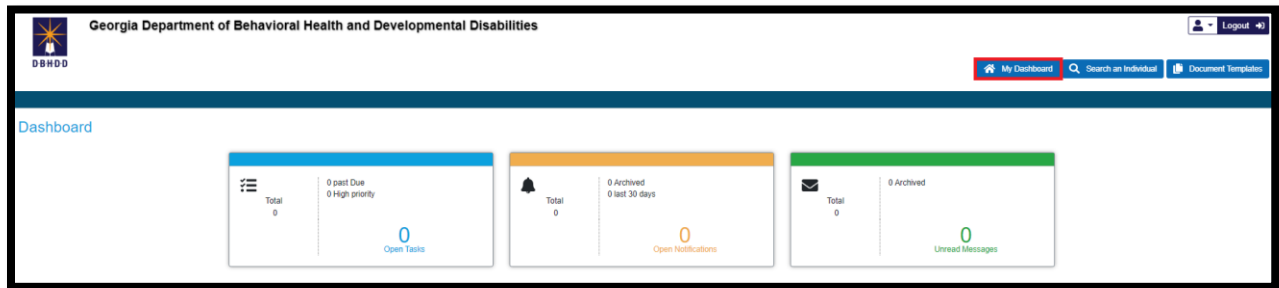


Figure 5: Dashboard

1.4 View My Tasks

- Step 1: To search a particular task, click on [Filter](#).
- Step 2: Enter the values in the fields available in filter section.
- Step 3: Click on [Filter](#) Button.
- Step 4: Click on [CID#](#) to navigate to demographics page of an Individual & views demographic information.

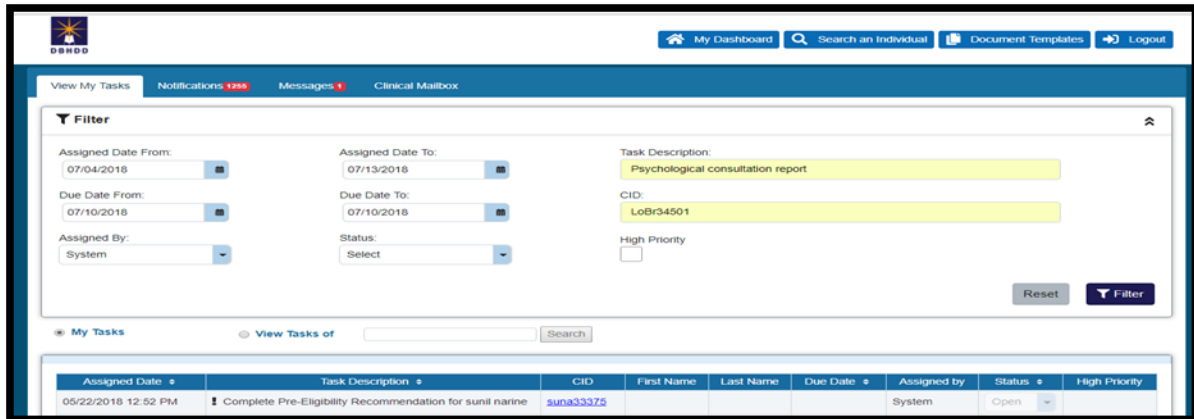


Figure 6: View My Task

1.5 Views Notifications

- Step 1: Click on [Notifications](#) Tab to view notifications.
- Step 2: To Archive Notifications, select notifications using checkbox and click on [Archive](#) button.
- Step 3: To View All Notifications, click on [View All Notifications](#).
- Step 4: To view Archived Notifications, click on [View Archived Notification](#).

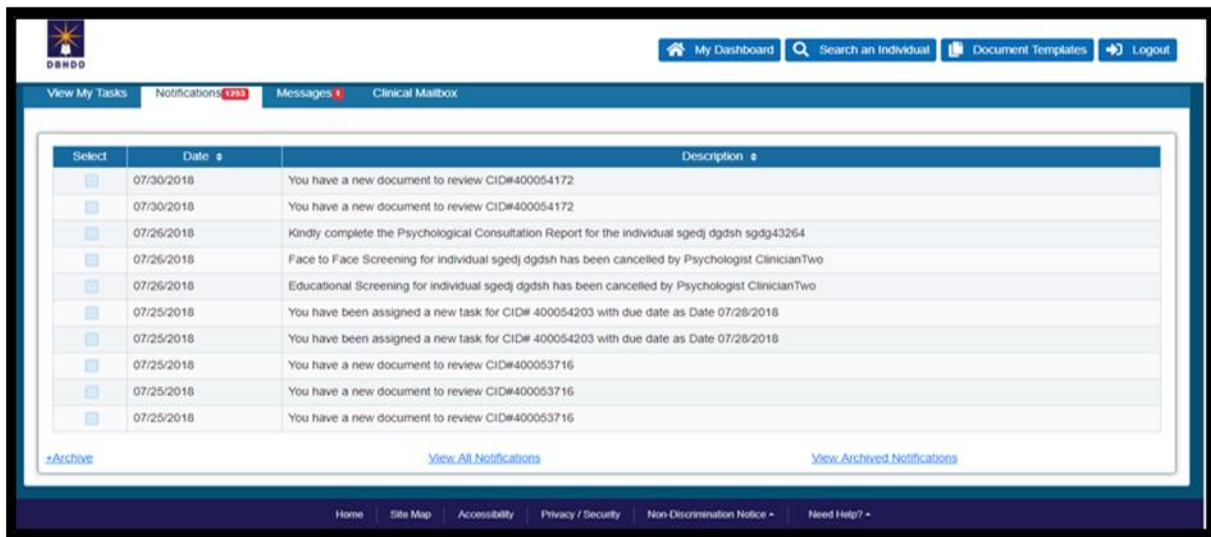


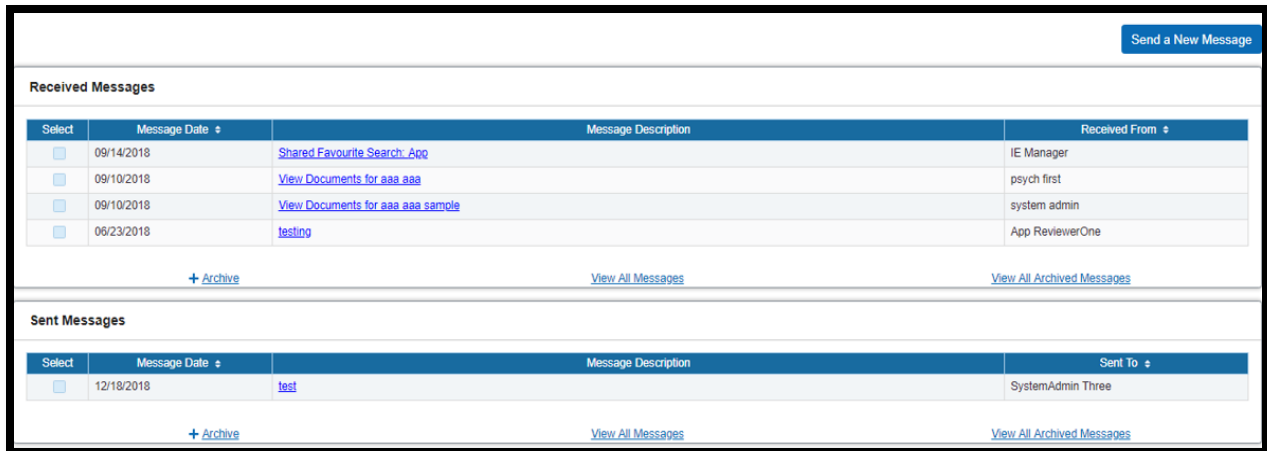
Figure 7: Notifications

1.6 View Messages

- Step 1: Click on the [Messages](#) Tab.
- Step 2: User views Sent or Received message.
- Step 3: Select the message and click on [Archive](#) button to archive the message.
- Click on [View All Messages](#) to view all messages.

1.7 Send a Message

- Step 1: Click on [Send a New Message](#) button.
- Step 2: Select the User by clicking on the search icon.
- Step 3: Enter message in [Message Box](#) field.
- Step 4: Click on [Send Message](#) button.



[Send a New Message](#)

Received Messages

Select	Message Date	Message Description	Received From
<input type="checkbox"/>	09/14/2018	Shared Favourite Search App	IE Manager
<input type="checkbox"/>	09/10/2018	View Documents for aaa aaa	psych first
<input type="checkbox"/>	09/10/2018	View Documents for aaa aaa sample	system admin
<input type="checkbox"/>	06/23/2018	testing	App ReviewerOne

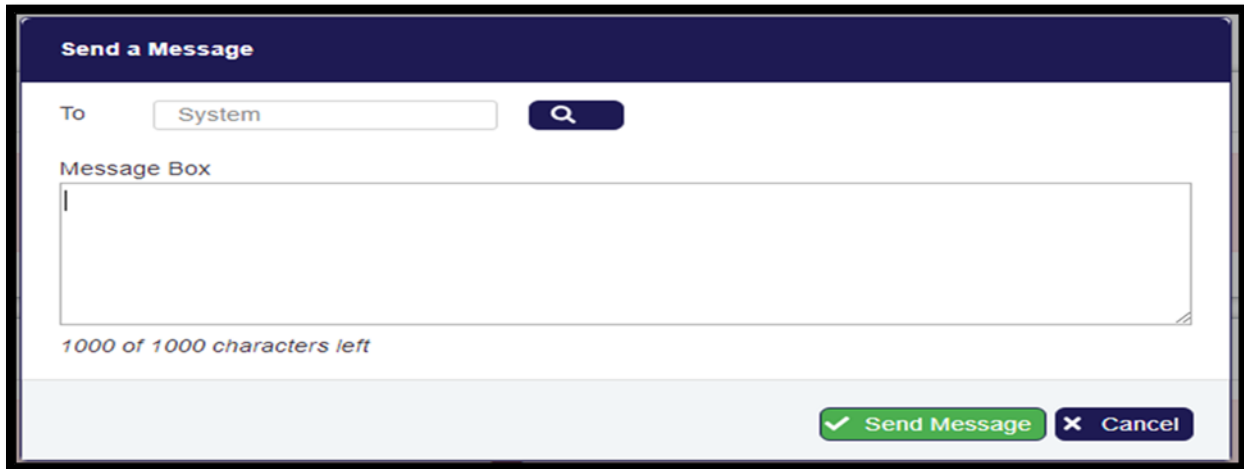
[+ Archive](#) [View All Messages](#) [View All Archived Messages](#)

Sent Messages

Select	Message Date	Message Description	Sent To
<input type="checkbox"/>	12/18/2018	test	SystemAdmin Three

[+ Archive](#) [View All Messages](#) [View All Archived Messages](#)

Figure 8: Messages



Send a Message

To: [Q](#)

Message Box

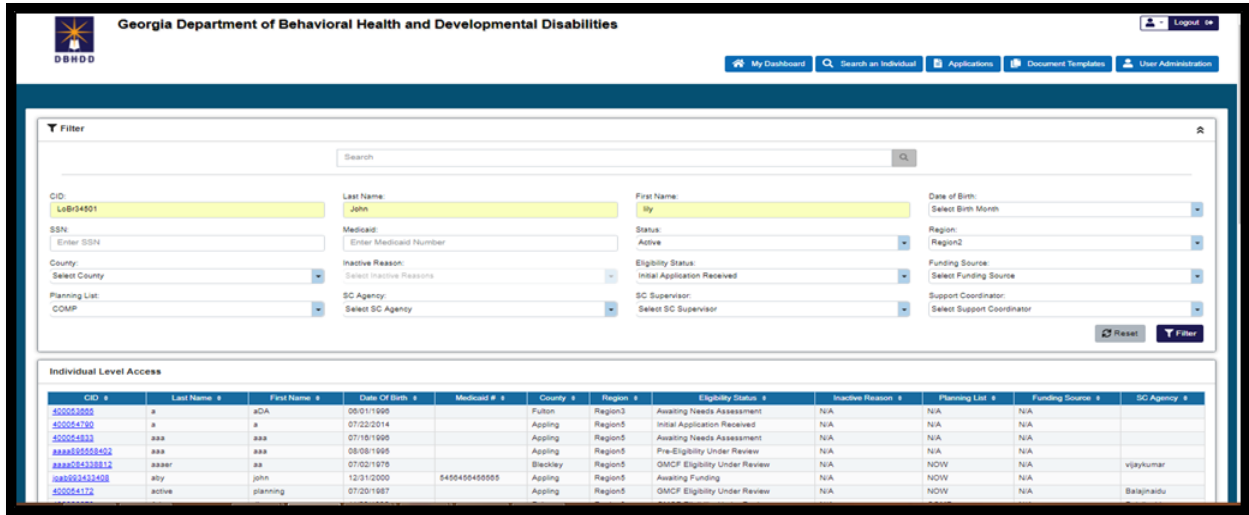
1000 of 1000 characters left

[✓ Send Message](#) [✕ Cancel](#)

Figure 9: Message Screen

1.8 User Searches for an Individual

- Step 1: Login to the IDD Connects portal.
- Step 2: Click on the [Search an Individual](#) tab.
- Step 3: Enter search criteria and click on filter button.
- Step 4: Click on [CID#](#) to navigate to the demographics page of Individual.



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My Dashboard Search an Individual Applications Document Templates User Administration

Filter

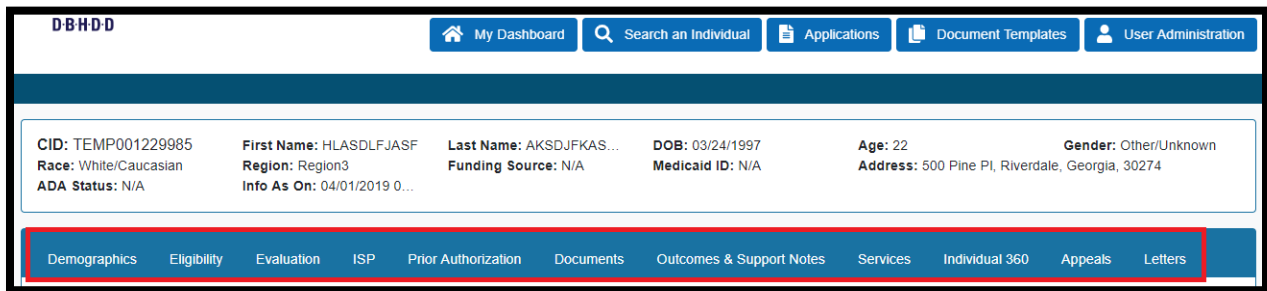
Search

CID: LeB034501 Last Name: John First Name: Ily Date of Birth: Select Birth Month
 SSN: Enter SSN Medicaid: Enter Medicaid Number Status: Active Region: Region2
 County: Select County Inactive Reason: Select Inactive Reasons Eligibility Status: Initial Application Received Funding Source: Select Funding Source
 Planning List: COMP SC Agency: Select SC Agency SC Supervisor: Select SC Supervisor Support Coordinator: Select Support Coordinator

Individual Level Access

CID #	Last Name #	First Name #	Date Of Birth #	Medicaid # #	County #	Region #	Eligibility Status #	Inactive Reason #	Planning List #	Funding Source #	SC Agency #
450031055	a	aDA	06/01/1995		Fulton	Region3	Awaiting Needs Assessment	N/A	N/A	N/A	
450054730	a	a	07/22/2014		Appling	Region5	Initial Application Received	N/A	N/A	N/A	
450054333	aaa	aaa	07/15/1995		Appling	Region5	Awaiting Needs Assessment	N/A	N/A	N/A	
88885555452	aaa	aaa	03/05/1995		Appling	Region5	Pre-Eligibility Under Review	N/A	N/A	N/A	
888854338312	aaeer	aa	07/02/1978		Blackley	Region5	QMCF Eligibility Under Review	N/A	NOW	N/A	vijaykumar
888854331508	atly	john	12/31/2000	5455455455555	Appling	Region5	Awaiting Funding	N/A	NOW	N/A	
450054172	active	planning	07/20/1987		Appling	Region5	QMCF Eligibility Under Review	N/A	NOW	N/A	Balajinadu

Figure 10: Search an Individual Page

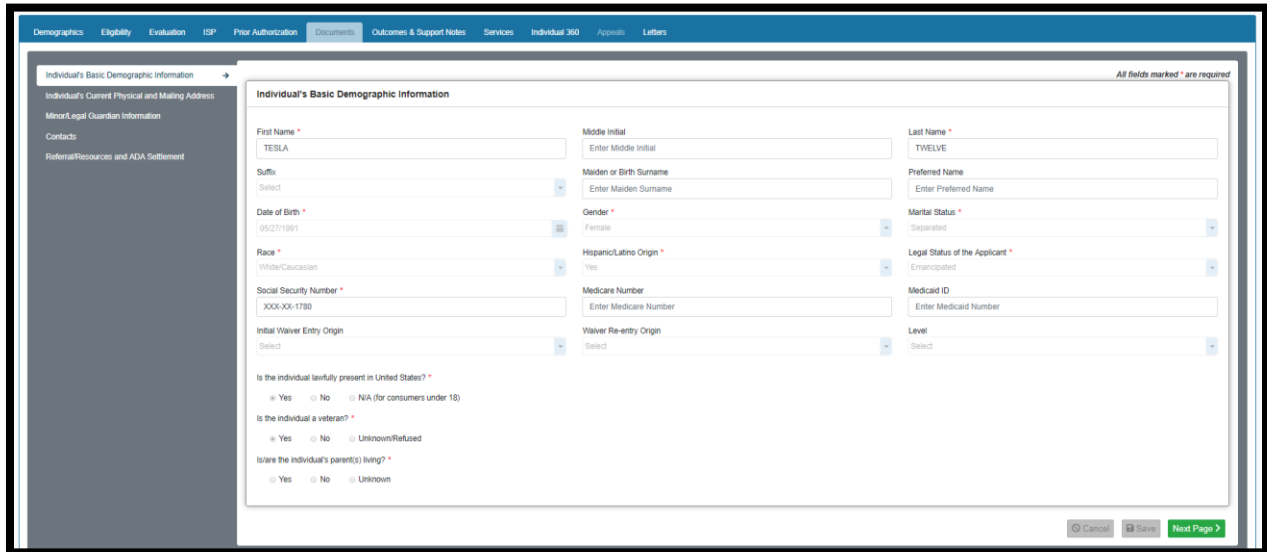


DBHDD My Dashboard Search an Individual Applications Document Templates User Administration

CID: TEMP001229985 First Name: HLASDLFJASF Last Name: AKSDJFKAS... DOB: 03/24/1997 Age: 22 Gender: Other/Unknown
 Race: White/Caucasian Region: Region3 Funding Source: N/A Medicaid ID: N/A Address: 500 Pine Pl, Riverdale, Georgia, 30274
 ADA Status: N/A Info As On: 04/01/2019 0...

Demographics Eligibility Evaluation ISP Prior Authorization Documents Outcomes & Support Notes Services Individual 360 Appeals Letters

Figure 11: Demographics Page



Individual's Basic Demographic Information

Individual's Current Physical and Mailing Address
 Minor/Legal Guardian Information
 Contacts
 Referral/Resources and ADA Settlement

Individual's Basic Demographic information

First Name * TESLA Middle Initial Enter Middle Initial Last Name * TWELVE
 Suffix Select Maiden or Birth Surname Enter Maiden Surname Preferred Name Enter Preferred Name
 Date of Birth * 05/27/1991 Gender * Female Marital Status * Separated
 Race * White/Caucasian Hispanic/Latino Origin * Yes Legal Status of the Applicant * Emancipated
 Social Security Number * XXX-XX-1780 Medicare Number Enter Medicare Number Medicaid ID Enter Medicaid Number
 Initial Waiver Entry Origin Select Waiver Re-entry Origin Select Level Select
 Is the individual lawfully present in United States? *
 Yes No N/A (for consumers under 18)
 Is the individual a veteran? *
 Yes No Unknown/Refused
 Are the individual's parent(s) living? *
 Yes No Unknown

Cancel Save Next Page >

Figure 12: Individual's Basic Demographic Information

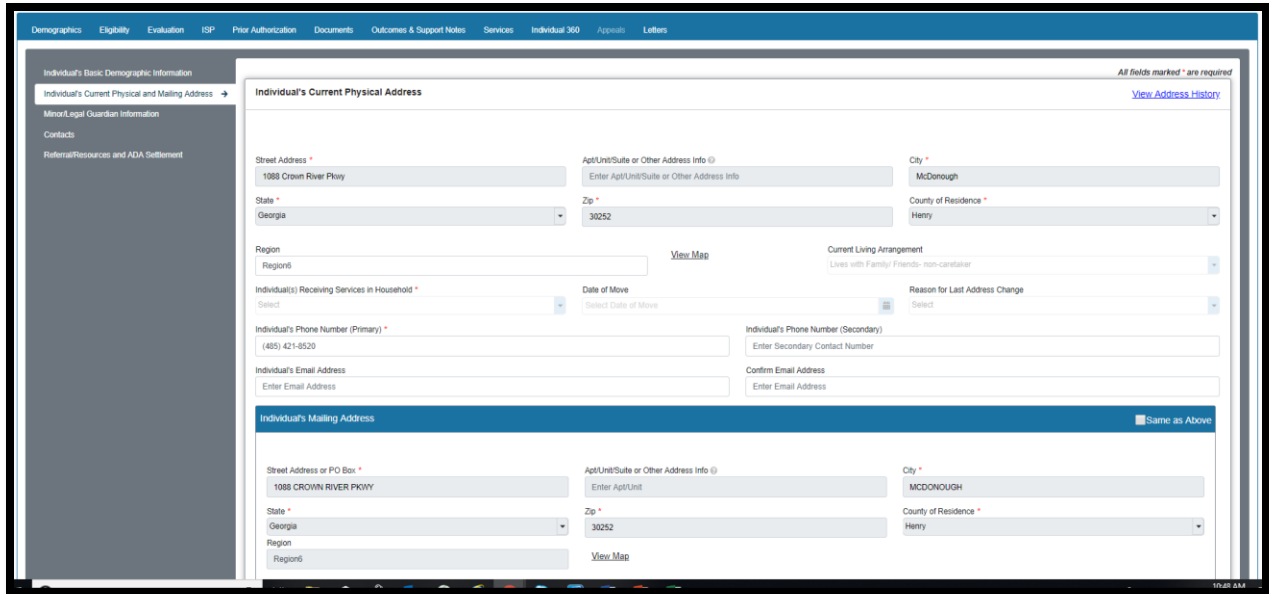


Figure 13: Individual's Current Physical and Mailing Address

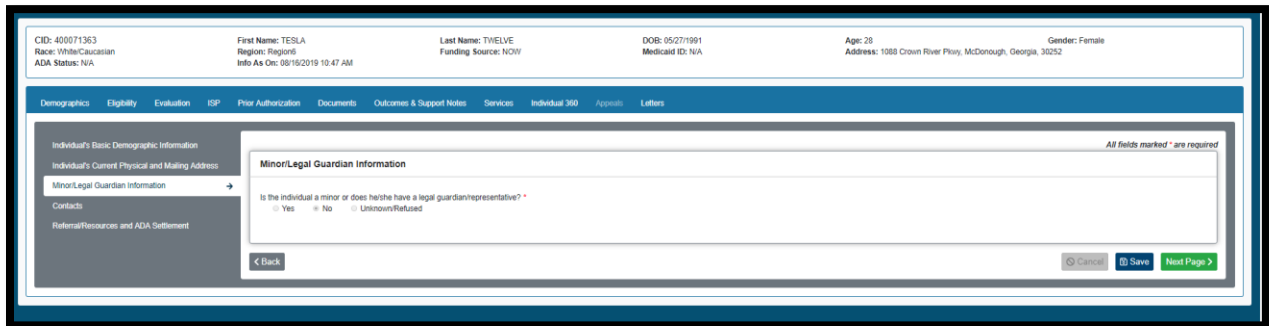
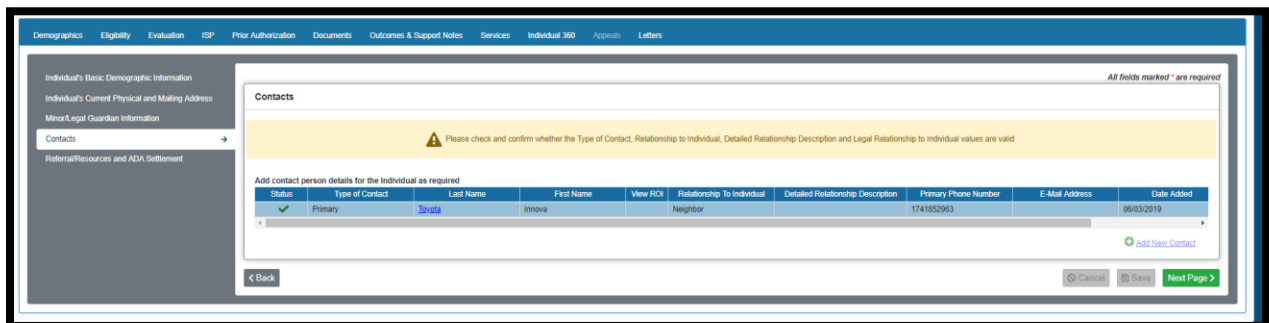
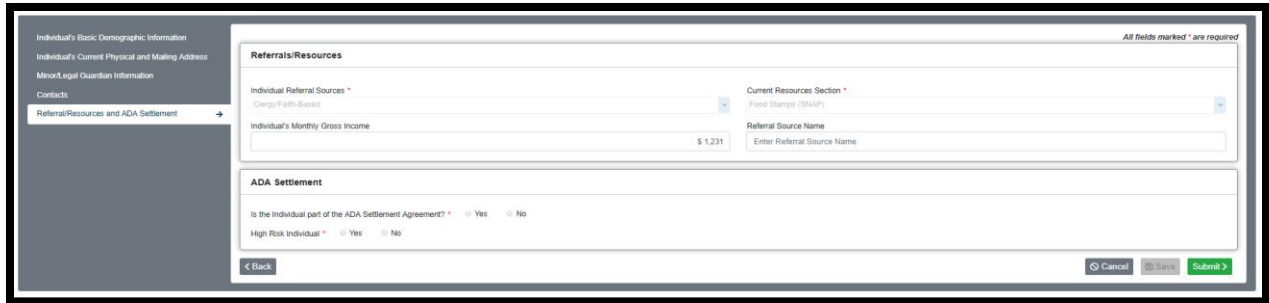


Figure 14: Minor/Legal Guardian Information



Status	Type of Contact	Last Name	First Name	View ROI	Relationship To Individual	Detailed Relationship Description	Primary Phone Number	E-Mail Address	Date Added
<input checked="" type="checkbox"/>	Primary	Inova	Inova		Neighbour		1741952963		06/03/2019

Figure 15: Contacts Information



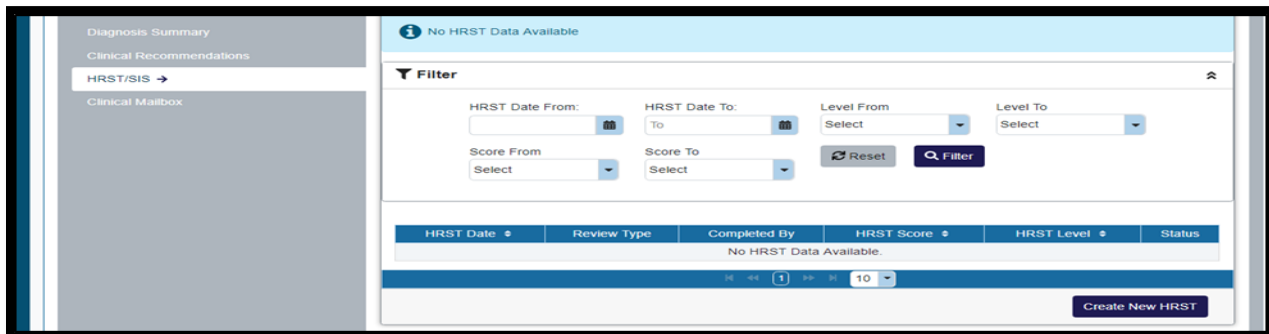
The screenshot shows a web form with a sidebar on the left containing navigation links: "Individual's Basic Demographic Information", "Individual's Current Physical and Mailing Address", "Minor/Legal Guardian Information", "Contacts", and "Referrals/Resources and ADA Settlement" (which is highlighted). The main form area is titled "Referrals/Resources" and includes fields for "Individual Referral Sources" (with a dropdown for "Change Faith Based"), "Current Resources Section" (with a dropdown for "Fixed Stamps (SHAP)", and "Referral Source Name" (with a text input for "Enter Referral Source Name"). Below this, the "Individual's Monthly Gross Income" is displayed as "\$ 1,231". A section titled "ADA Settlement" contains two questions: "Is the individual part of the ADA Settlement Agreement?" with radio buttons for "Yes" and "No", and "High Risk Individual" with radio buttons for "Yes" and "No". At the bottom right, there are "Cancel", "Save", and "Submit" buttons. A note at the top right states "All fields marked * are required".

Figure 16: Referral/Resources and ADA Settlement

2. Complete the Health Risk Screening Tool (HRST)

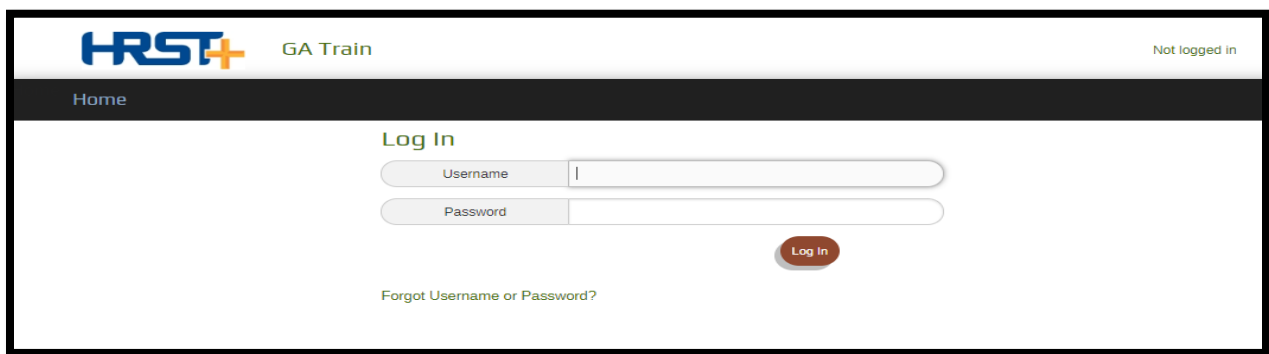
2.1 Create HRST

- Step 1: Login to the DBHDD portal and click on the [Open Tasks](#) tile.
- Step 2: View Tasks in [View My Tasks](#) tab.
- Step 3: Click on the [CID](#) for a particular task to navigate to Demographic tab of Individual
- Step 4: Click on the Evaluation tab.
- Step 5: Click on HRST/SIS tab.
- Step 6: Click on the [Create New HRST](#). User navigates to HRST Site.



The screenshot shows the HRST section of a web application. On the left is a sidebar with "Diagnosis Summary", "Clinical Recommendations", "HRST/SIS" (highlighted with a right-pointing arrow), and "Clinical Mailbox". The main content area has a header "No HRST Data Available" with an information icon. Below is a "Filter" section with dropdowns for "HRST Date From", "HRST Date To", "Level From", "Level To", "Score From", and "Score To", along with "Reset" and "Filter" buttons. A table below the filter shows columns for "HRST Date", "Review Type", "Completed By", "HRST Score", "HRST Level", and "Status". The table content is empty, with the text "No HRST Data Available." displayed. At the bottom right, there is a "Create New HRST" button.

Figure 17: HRST section



The screenshot shows the HRST Site login page. The top header includes the "HRST+ GA Train" logo and "Not logged in" text. Below the header is a "Home" link. The main content area is titled "Log In" and features two input fields: "Username" and "Password". A "Log In" button is positioned below the fields. At the bottom, there is a link for "Forgot Username or Password?".

Figure 18: HRST Site

3. Individual Service Plan (ISP)

3.1 Accessing ISP

- Step 1: Step 1: Login to the DBHDD portal and click on the [Open Tasks](#) tile.
- Step 2: View Tasks in [View My Tasks](#) tab.
- Step 3: Click on the [CID#](#) for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the [ISP](#) tab.
- Step 5: Click on ISP Type.

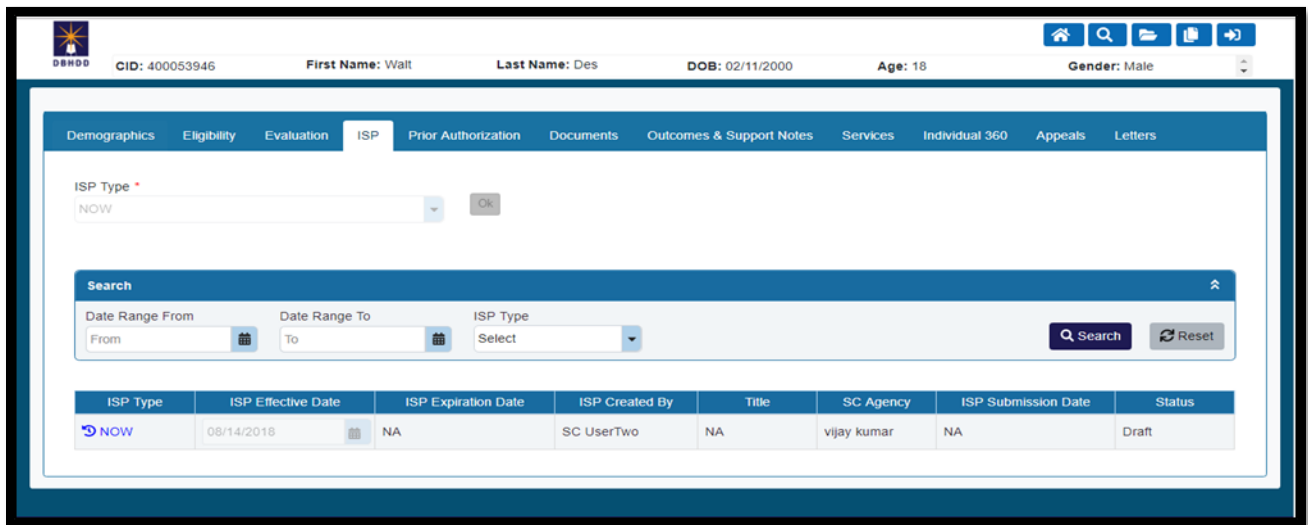


Figure 19: ISP

Note: Click on the icon next to the ISP Type to view the historical ISPs.

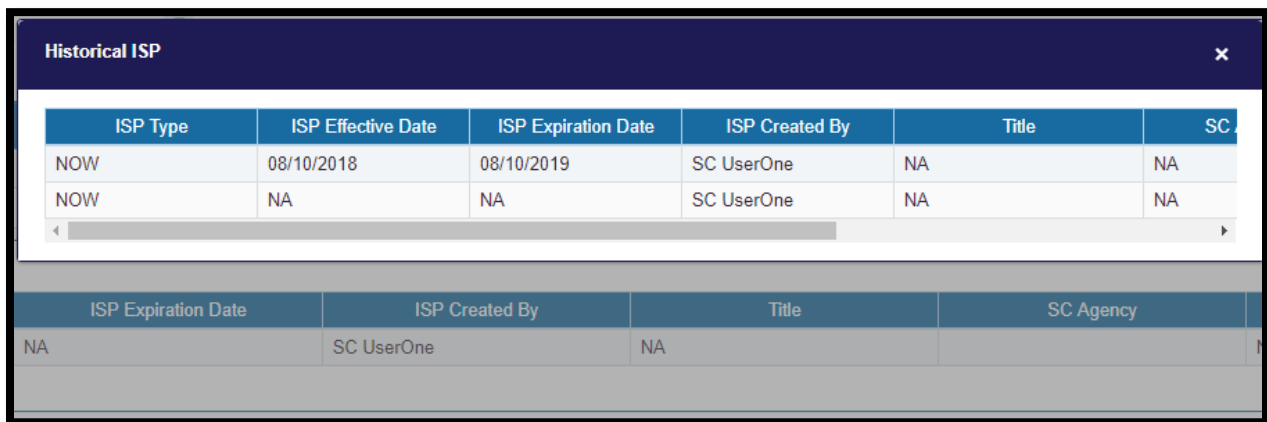
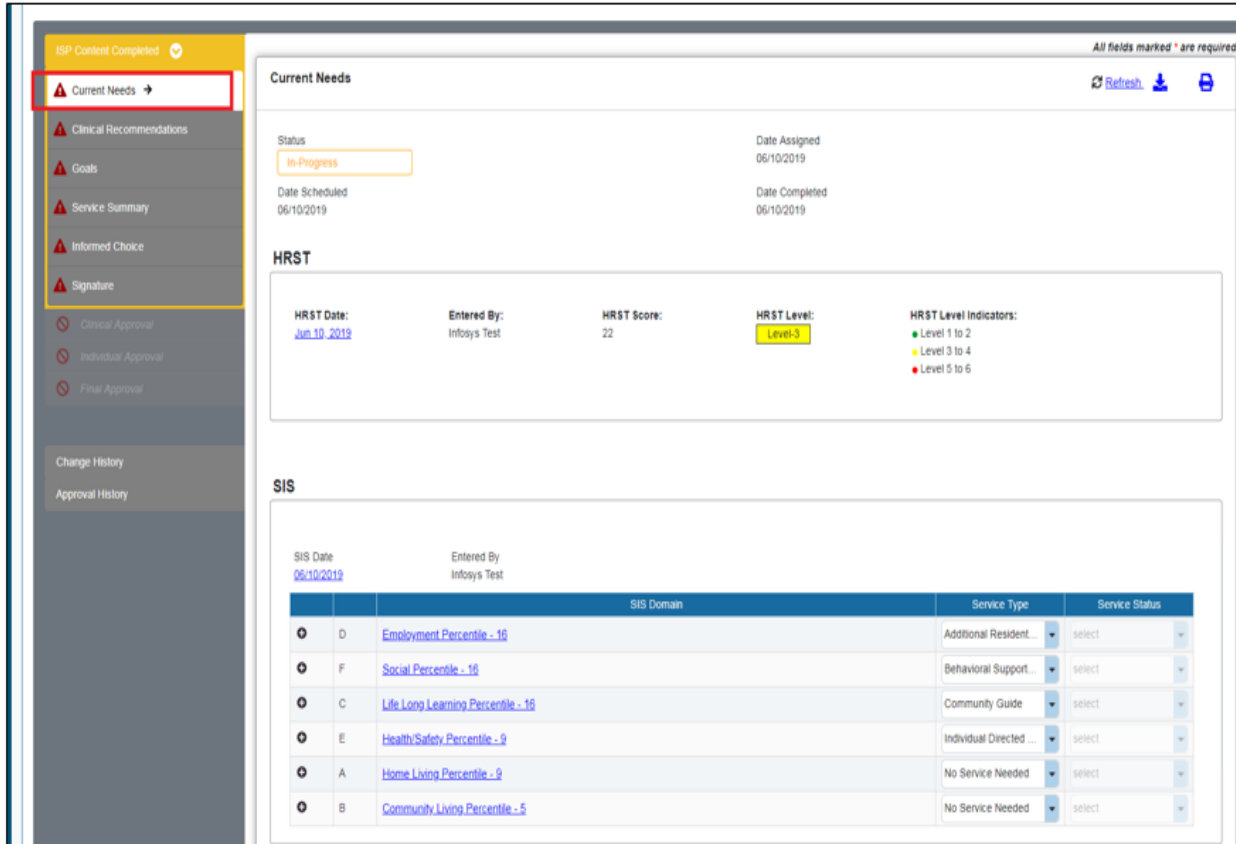


Figure 20: Historical ISP

3.2 View ISP Current Needs

- Step 1: Click on **ISP** type tab.
- Step 2: Click on **ISP Content** tab to **Current Needs** tab to view HRST, SIS, Exceptional Medical, and Exceptional Behavior Support results.



The screenshot shows the 'Current Needs' interface. On the left is a navigation sidebar with 'Current Needs' highlighted. The main content area displays the following information:

- Status:** In-Progress
- Date Assigned:** 06/10/2019
- Date Scheduled:** 06/10/2019
- Date Completed:** 06/10/2019

HRST Summary:

- HRST Date:** Jun 10, 2019
- Entered By:** Infosys Test
- HRST Score:** 22
- HRST Level:** Level-3
- HRST Level Indicators:**
 - Level 1 to 2
 - Level 3 to 4
 - Level 5 to 6

SIS Summary:

- SIS Date:** 06-10-2019
- Entered By:** Infosys Test

		SIS Domain	Service Type	Service Status
<input checked="" type="radio"/>	D	Employment_Percentile - 16	Additional Resident...	select
<input checked="" type="radio"/>	F	Social_Percentile - 16	Behavioral Support...	select
<input checked="" type="radio"/>	C	Life Long Learning_Percentile - 16	Community Guide	select
<input checked="" type="radio"/>	E	Health/Safety_Percentile - 9	Individual Directed ...	select
<input checked="" type="radio"/>	A	Home Living_Percentile - 9	No Service Needed	select
<input checked="" type="radio"/>	B	Community Living_Percentile - 5	No Service Needed	select

Figure 21: ISP

Exceptional Medical Supports

Any Items Rated - Yes # of Items Rated - 4

	Exceptional Item	Score	Comments
1	others	2 - Extensive Support Needed	
2	Turning or positioning	1 - Some Support Needed	Need some support with skin care
3	Lifting and/or transferring	1 - Some Support Needed	
4	Allergies	1 - Some Support Needed	Seasonal Allergies

Figure 22: Exceptional Medical Supports

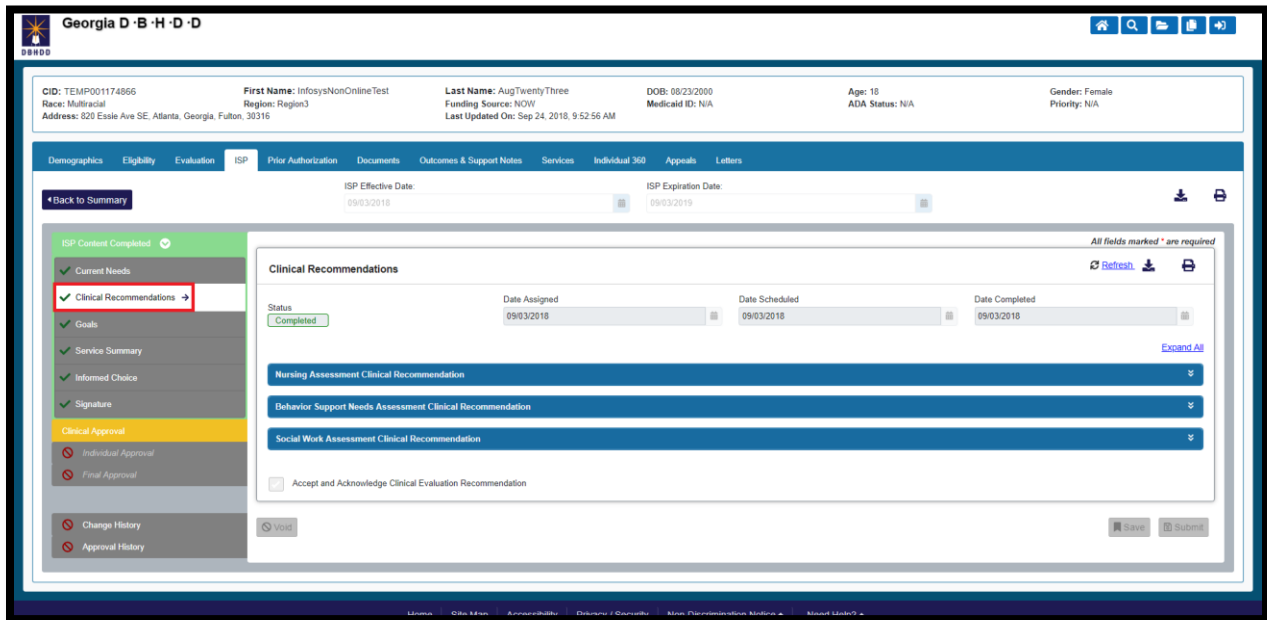
Exceptional Behavioral Supports

		Any Items Rated - Yes		# of Items Rated - 5	
Exceptional Item	SIS Score	Comments	Consideration of PBSP/Safety Plan?		PBSP/ Safety Plan Comments
1	Prevention of emotional outbursts	2 - Extensive Support Needed	<input type="radio"/> Yes <input checked="" type="radio"/> No		Enter PBSP/ Safety Plan Comments 100 characters left
2	Maintaining mental health treatments	1 - Some Support Needed	<input type="radio"/> Yes <input checked="" type="radio"/> No		Enter PBSP/ Safety Plan Comments 100 characters left
3	Prevention of property destruction	1 - Some Support Needed	<input type="radio"/> Yes <input checked="" type="radio"/> No		Enter PBSP/ Safety Plan Comments 100 characters left

Figure 23: Exceptional Behavioral Supports

3.3 View ISP Clinical Recommendations

- Step 1: Click on ISP type tab.
- Step 2: Click on ISP content tab to [Clinical Recommendation](#) tab.



Georgia D·B·H·D·D

CID: TEMPO01174866 First Name: InfosysNonOnlineTest Last Name: AugTwentyThree DOB: 08/23/2000 Age: 18 Gender: Female
 Race: Multiracial Region: Region3 Funding Source: NOW Medicaid ID: N/A ADA Status: N/A Priority: N/A
 Address: 820 Essie Ave SE, Atlanta, Georgia, Fulton, 30316 Last Updated On: Sep 24, 2018, 9:52:56 AM

Demographics Eligibility Evaluation **ISP** Prior Authorization Documents Outcomes & Support Notes Services Individual 360 Appeals Letters

ISP Effective Date: 09/03/2018 ISP Expiration Date: 09/03/2019

ISP Content Completed

- Current Needs
- Clinical Recommendations**
- Goals
- Service Summary
- Informed Choice
- Signature
- Clinical Approval
- Individual Approval
- Final Approval
- Change History
- Approval History

Clinical Recommendations

Status: Completed Date Assigned: 09/03/2018 Date Scheduled: 09/03/2018 Date Completed: 09/03/2018

Nursing Assessment Clinical Recommendation

Behavior Support Needs Assessment Clinical Recommendation

Social Work Assessment Clinical Recommendation

Accept and Acknowledge Clinical Evaluation Recommendation

Save Submit

Figure 24: ISP

3.4 View ISP Goals

- Step 1: Click on ISP type tab.
- Step 2: Click on the ISP Content tab to Goals tab to view [Person Centered Goals](#).

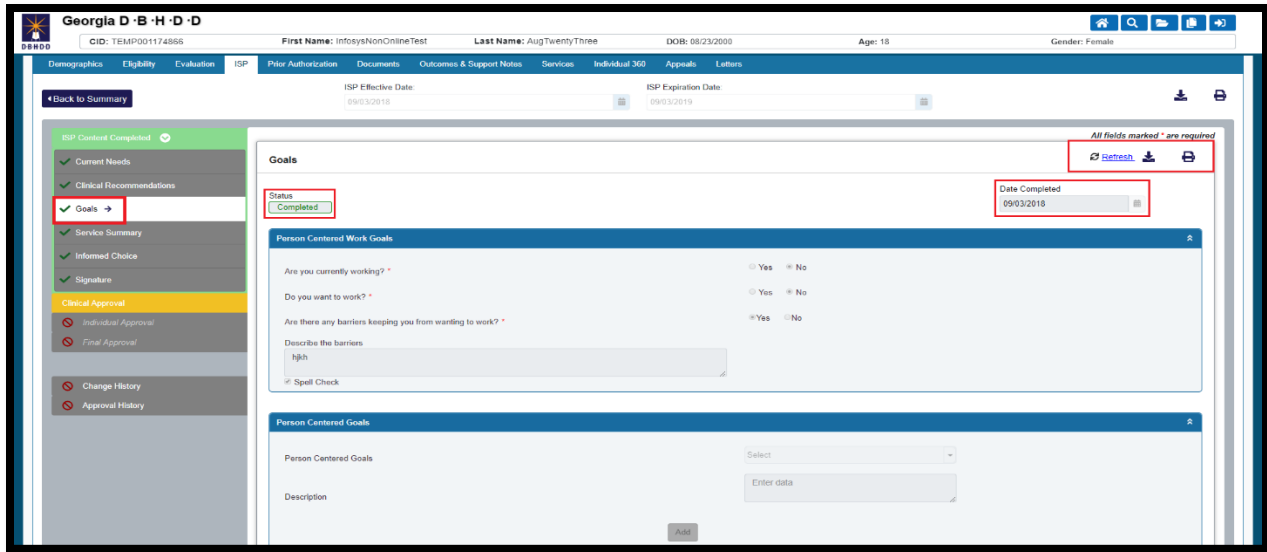


Figure 25: ISP

3.5 View ISP Service Summary

- Step 1: Click on ISP type tab.
- Step 2: Click on the ISP Content tab to [Service Summary](#) tab.

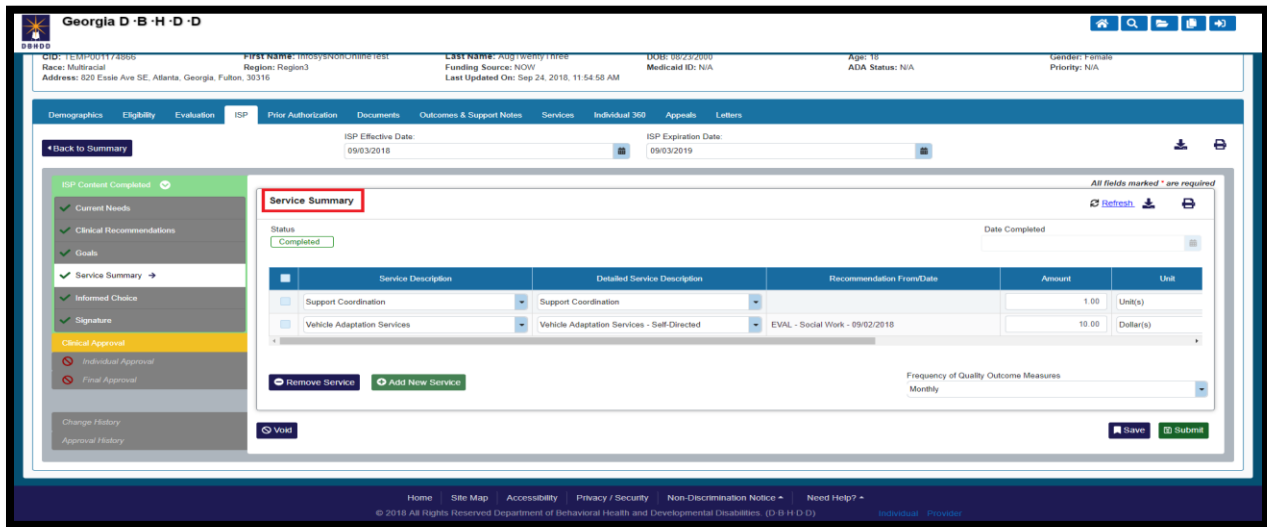


Figure 26: ISP

3.6 View ISP Informed Choice

- Step 1: Click on ISP type tab.
- Step 2: Click on the ISP Content tab to [Informed Choice](#) tab.

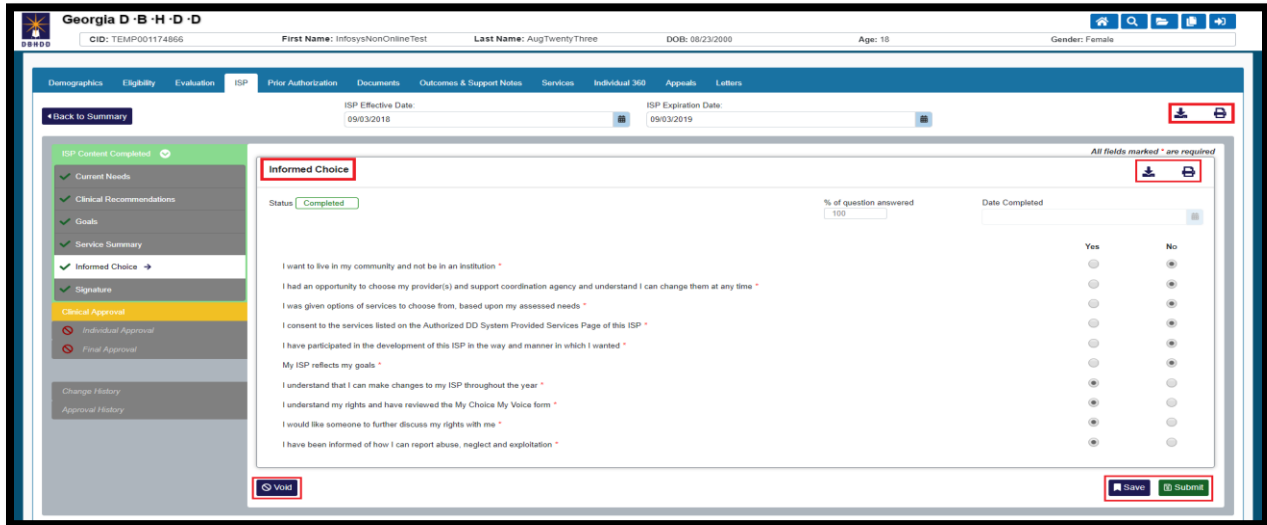


Figure 27: ISP

3.7 View ISP signature page

- Step 1: Click on ISP type tab.
- Step 2: Click on the ISP Content tab to signature tab.
- Step 3: Click the [Download Signature Page](#) button to download.

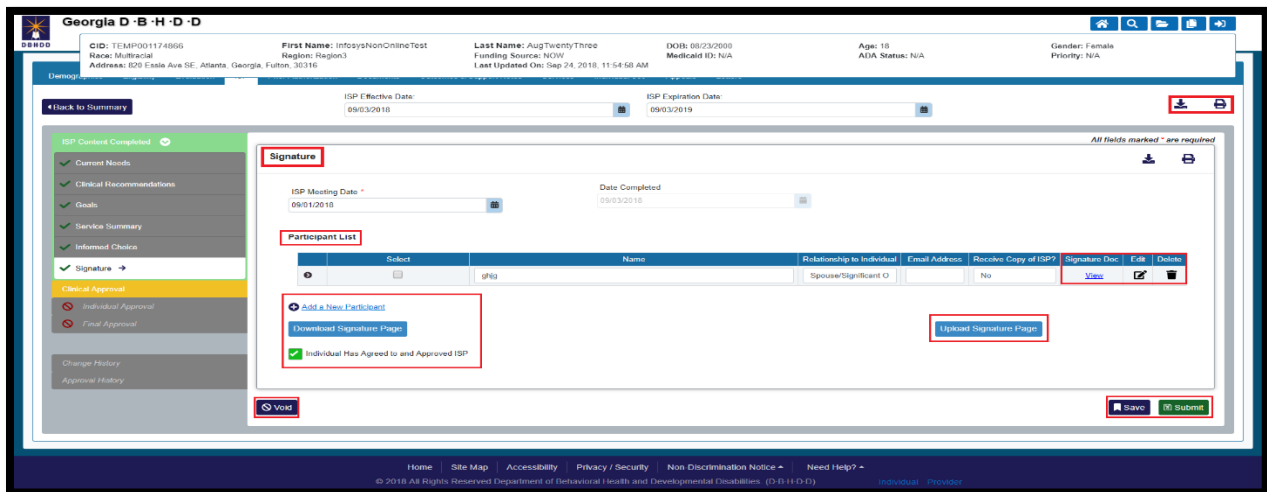



Figure 28: ISP



Georgia Department of Behavioral Health and Developmental Disabilities

Signature Page for Individual Service Plan for **John Doe**

I have fully participated in the development of this ISP and it reflects my goals, hopes and dreams:	<input type="radio"/> Yes	<input type="radio"/> No
I know I can choose the provider of my services and have signed the "Freedom of Choice" form:	<input type="radio"/> Yes	<input type="radio"/> No
I would like to meet with other providers:	<input type="radio"/> Yes	<input type="radio"/> No

If yes, action plan:

I understand my rights and have agreed to the responses included in the Informed Choice Form:	<input type="radio"/> Yes	<input type="radio"/> No
I understand my rights and have reviewed the Human Rights form:	<input type="radio"/> Yes	<input type="radio"/> No
I would like someone to further discuss my rights with me.	<input type="radio"/> Yes	<input type="radio"/> No

I consent to the narratives and services, as listed, within the ISP.

***Individual's Signature**

Date:

***Signature of Parent or Guardian
(If appropriate/applicable)**

Date:

*Reason for absence of individual/family/guardian:

Name	Title / Relationship	Program /Agency / Other	Signature	Date
John Smith	Father			
Simmy Sam	Mother			
NC Agency	Agency	NC Agency		

Figure 29: Signature Page Download

3.8 Individual Dashboard: Access to Review, Approve, or Reject ISP

- Step 1: Log in DBHDD Individual portal.
- Step 2: Click on the Approve Individual Service Plan tile.
- Step 3: Enter the [Approval Decision](#) and other details and click on Submit.

Submit a new application Attach Documents View Submitted Application





			
<p>Manage my Applications You can view, edit or delete your submitted applications</p>	<p>Submit a new Application Create a new application and submit</p>	<p>Track an Application Track the current status of the Mailed, Faxed or Telephonic applications submitted</p>	<p>Approve Individual Service Plan Approve, Reject current ISP approvals</p>

Figure 30: ISP

[My Dashboard](#) / [ISP Approval](#)

Service Summary

Service Description	Detailed Service Description	Frequency
Community Residential Alternative Services	CRA - Group Home: 3 Person Category 1	5 Units Weekly for 2 Months
Behavioral Supports Services	Behavioral Supports Services	12 Units Quarterly for 12 Months
Intensive Support Coordination Services	Intensive Support Coordination	7 Units Weekly for 5 Months
Transportation Services	Transportation - Encounter/Trip	2 Units Daily for 2 Months

Approval Status
 Approved Rejected

Reason for Rejection

Other Description


Approval Date  Approved by

Figure 31: ISP

4. Documents Tab

4.1 View Documents

- Step 1: Under the navigation bar, click on [View Document](#) tab.
- Step 2: Enter the search criteria and click on [Search](#).

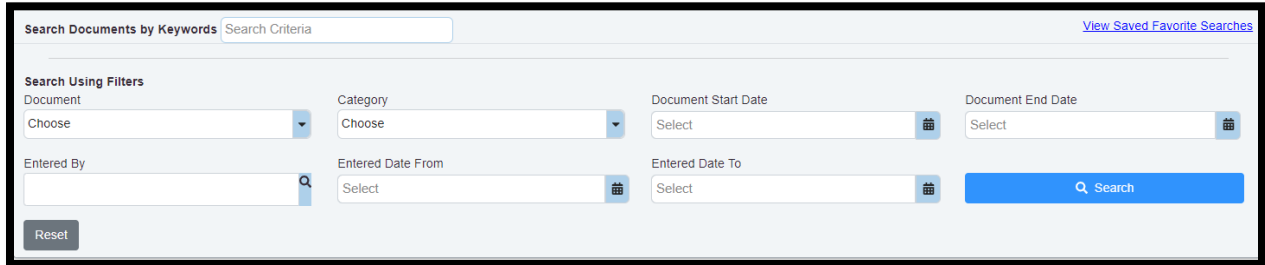
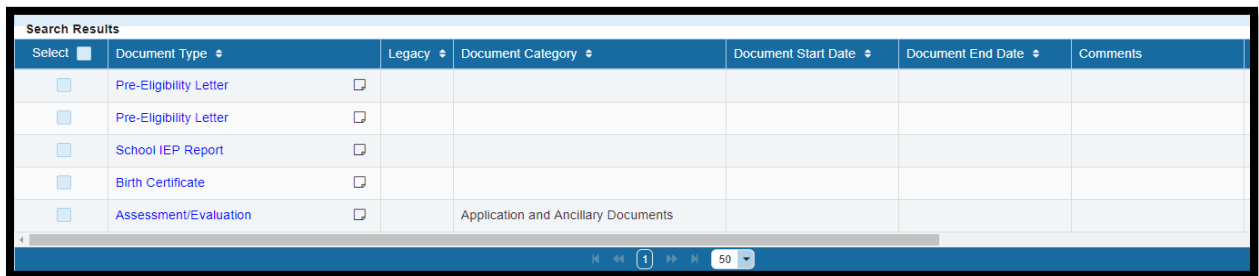


Figure 32: Documents



Select	Document Type	Legacy	Document Category	Document Start Date	Document End Date	Comments
<input type="checkbox"/>	Pre-Eligibility Letter	<input type="checkbox"/>				
<input type="checkbox"/>	Pre-Eligibility Letter	<input type="checkbox"/>				
<input type="checkbox"/>	School IEP Report	<input type="checkbox"/>				
<input type="checkbox"/>	Birth Certificate	<input type="checkbox"/>				
<input type="checkbox"/>	Assessment/Evaluation	<input type="checkbox"/>	Application and Ancillary Documents			

Figure 33: Documents

4.2.1 Request for Document Removal

- Step 1: Click on the box under the [Select](#) column for the document to request for removal.
- Step 2: Click on the [Submit Request for Removal](#) button.
- Step 3: Enter reason for removal and click [save](#).

Note: The request for document removal is available to certain users of the system. The system sends a notification to the designated DBHDD staff to approve the status request.

4.2.2 Download Documents

- Step 1: Select document and click on the [Download](#) button.
- Step 2: Select to download document(s) as one single file or as a separate file. The system downloads the document as a PDF document.

4.2.3 Send Document Using Internal Message

- Step 1: Select document and click on the [Internal Message](#) button.
- Step 2: Select the username in [Send To](#) field.
- Step 3: enter Message, attach documents, and click on [submit](#).

4.2.4 Send Document Using Email

- Step 1: Select the document to send and click on the [Email](#) Button. The system will automatically connect to the email system to open up a new email with the attached document.

Search Results

Select	Document Type	Entered Date	Entered By	Request For Removal	Reason For Removal
<input type="checkbox"/>	Pre-Eligibility Letter	<input type="checkbox"/>	IE Manager	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Pre-Eligibility Letter	<input type="checkbox"/>	IE Manager	<input checked="" type="checkbox"/>	duplicate
<input type="checkbox"/>	School IEP Report	<input type="checkbox"/> 03/04/2019	Nancy Tester	<input type="checkbox"/>	
<input type="checkbox"/>	Birth Certificate	<input type="checkbox"/> 03/04/2019	Nancy Tester	<input type="checkbox"/>	
<input type="checkbox"/>	Assessment/Evaluation	<input type="checkbox"/> 03/04/2019	psych first	<input type="checkbox"/>	

50

Download Email Internal Message Submit Request For Removal >

Figure 34: Documents

Sending a Document using Internal Message

Documents

Download Email Internal Message Submit Request For Removal >

WARNING!

Sharing sensitive information or PHI related documents to unauthorised personnel is against the company policy & state law.
Note: You will need to manually attach the documents once download is complete.
 Do you still wish to continue?

Yes Cancel

The Georgia Collaborative ASO

Figure 35: Documents

Sending a Document using Internal Message

Documents

Download Email Internal Message Submit Request For Removal >

Send Internal Message

Send To: PLA SupervisorTwo

Message Date: 04/02/2019

Entered By: ASM User

Track through completion

Message Description: View Documents for NANCY TESTER

Attachments: Pre-Eligibility Letter

Discard Submit

The Georgia Collaborative ASO

Figure 36: Documents

4.2.5 Download Documents

- Step 1: Under the navigation bar, click on the [Upload Document](#) tab.
- Step 2: Click on the [Choose File](#) button to select the document to upload.
- Step 3: Once the document upload is complete, click on the dropdown arrow to select the [Document Type](#).
- Step 4: Click on the dropdown arrow to select [Document Category](#).
- Step 5: If needed, enter a comment.
- Step 6: If uploading a letter, enter the date of the letter.
- Step 7: Click the [Upload](#) button.

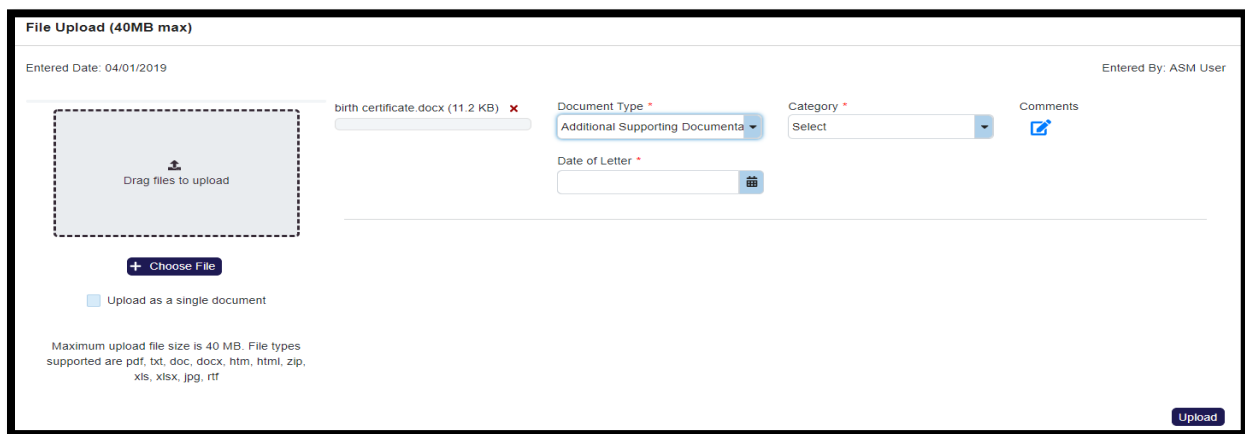


Figure 37: Document Upload

5. Document Templates (DBHDD access only)

5.1 Select Document Template

- Step 1: On the system homepage, click on the [Document Templates](#) tab.
- Step 2: Select the document name and click on [Download](#) button

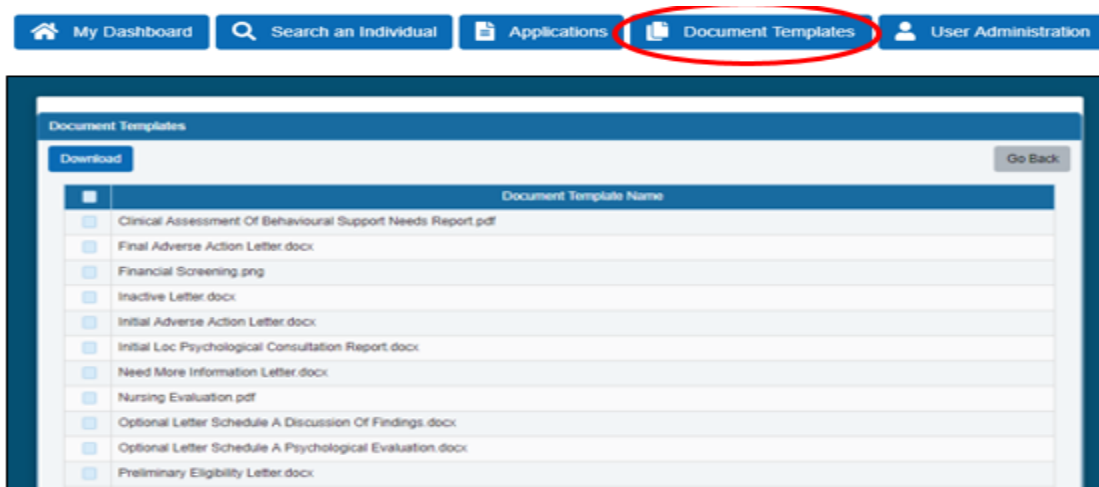
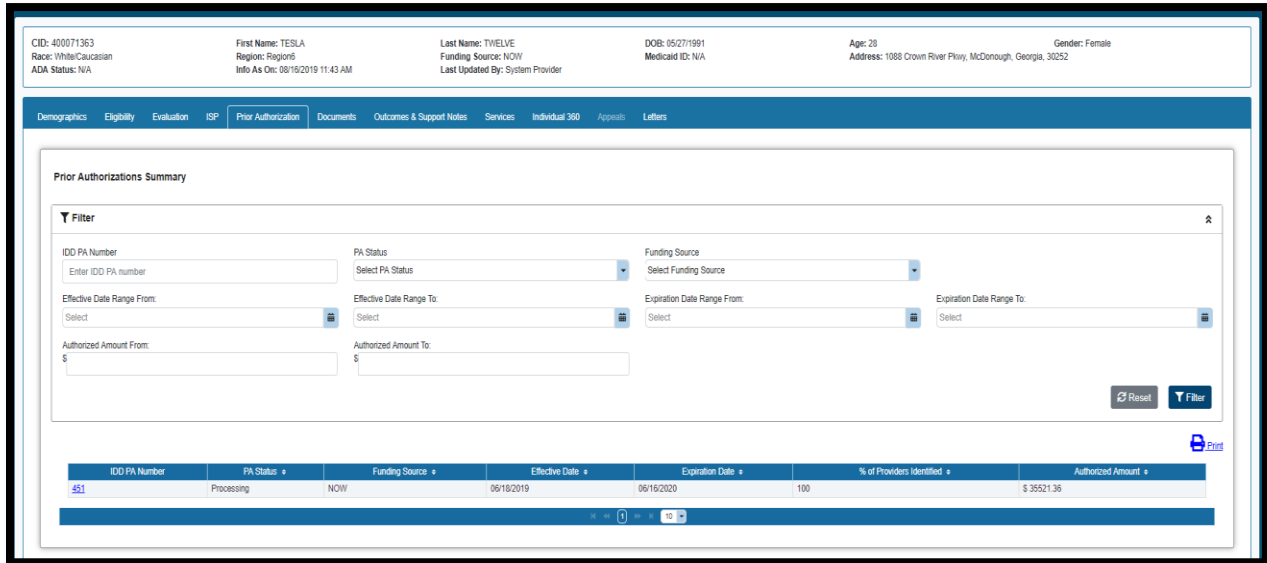


Figure 38: Documents Template

6. Prior Authorization (PA)

6.1 Prior Authorization *view only*

- Step 1: Log in IDD Connects portal.
- Step 2: Search an Individual and click on the **CID#** to navigate to Demographic tab of the Individual.
- Step 3: Click on **Prior Authorization** Tab to view the Prior Authorizations.
- Step 4: Click on the IDD PA Number hyperlink to view the details of the PA.



Prior Authorizations Summary

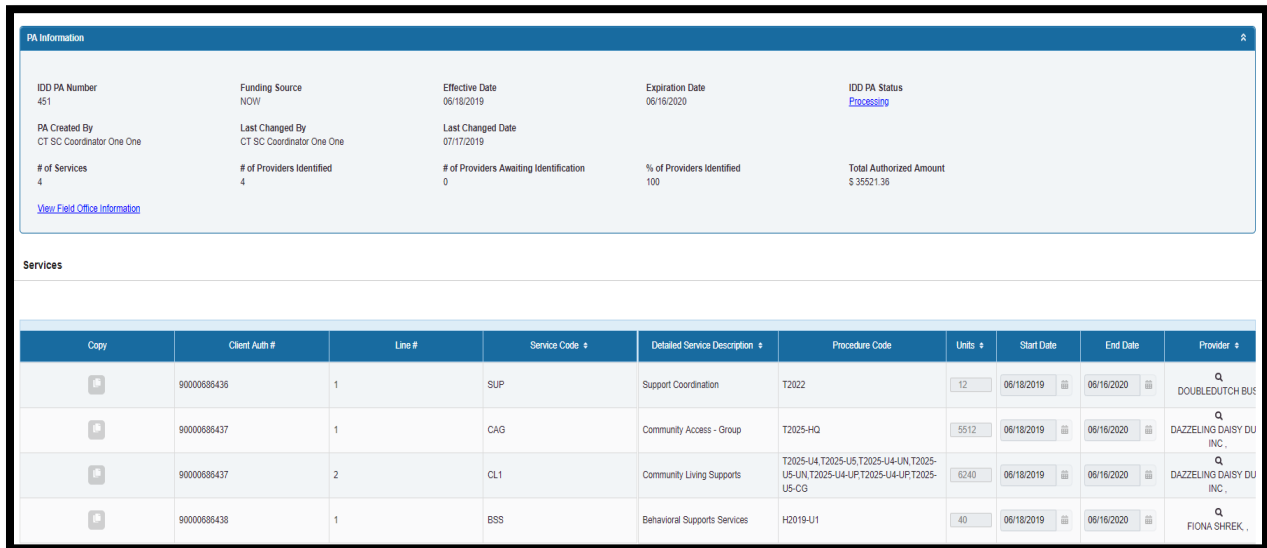
Filter

IDD PA Number: Enter IDD PA number
 PA Status: Select PA Status
 Funding Source: Select Funding Source
 Effective Date Range From: Select
 Effective Date Range To: Select
 Expiration Date Range From: Select
 Expiration Date Range To: Select
 Authorized Amount From: \$
 Authorized Amount To: \$

[Reset](#) [Filter](#)

IDD PA Number	PA Status	Funding Source	Effective Date	Expiration Date	% of Providers Identified	Authorized Amount
451	Processing	NOW	06/18/2019	06/16/2020	100	\$ 35521.36

Figure 39: Prior Authorization



PA Information

IDD PA Number: 451
 Funding Source: NOW
 Effective Date: 06/18/2019
 Expiration Date: 06/16/2020
 IDD PA Status: [Processing](#)

PA Created By: CT SC Coordinator One One
 Last Changed By: CT SC Coordinator One One
 Last Changed Date: 07/17/2019

of Services: 4
 # of Providers Identified: 4
 # of Providers Awaiting Identification: 0
 % of Providers Identified: 100
 Total Authorized Amount: \$ 35521.36

[View Field Office Information](#)

Services

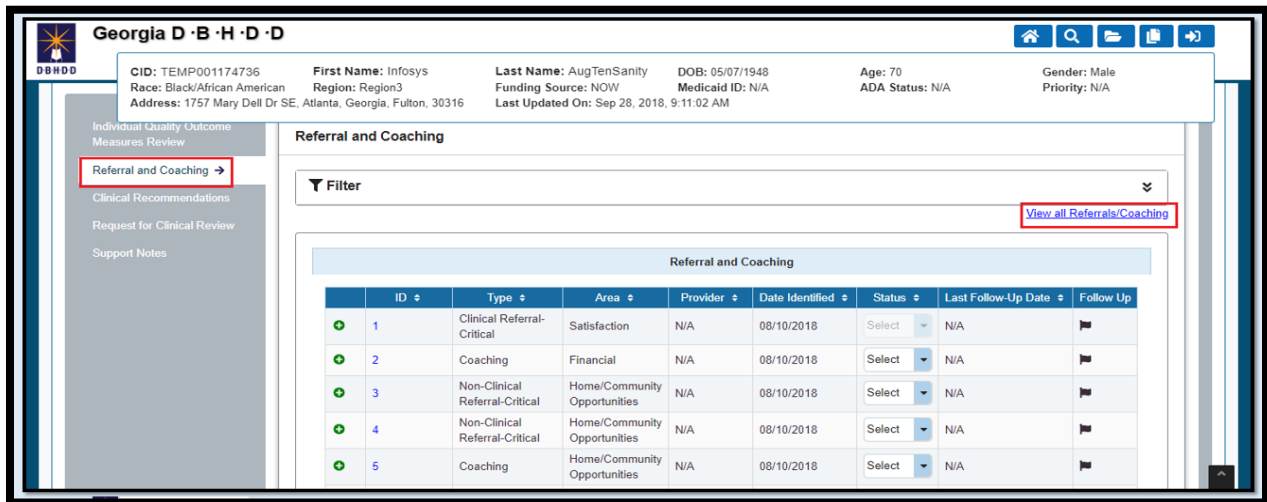
Copy	Client Auth #	Line #	Service Code	Detailed Service Description	Procedure Code	Units	Start Date	End Date	Provider
	9000068436	1	SUP	Support Coordination	T2022	12	06/18/2019	06/16/2020	DOUBLE DUTCH BUS
	9000068437	1	CAG	Community Access - Group	T2025-HQ	5512	06/18/2019	06/16/2020	DAZZELING DAISY DU INC.
	9000068437	2	CL1	Community Living Supports	T2025-U4, T2025-U5, T2025-U4-UJ, T2025-U5-UJ, T2025-U4-UP, T2025-U5-CG	6240	06/18/2019	06/16/2020	DAZZELING DAISY DU INC.
	9000068438	1	BSS	Behavioral Supports Services	H2019-U1	40	06/18/2019	06/16/2020	FIONA SHREK

Figure 40: Prior Authorization

7. Outcome and Supports Tab

7.1 Referral and Coaching *view only*

- Step 1: Log in IDD Connects portal.
- Step 2: Search an Individual and click on the **CID#** to navigate to Demographic tab of the Individual.
- Step 3: Click on **Outcomes and Supports** Tab, and then click on **Referral and Coaching** to view the Referral/Coaching.
- Step 4: Click on the (+) to view the details of each Referral and Coaching.



Georgia D·B·H·D·D

CID: TEMP001174736 First Name: Infosys Last Name: AugTenSanity DOB: 05/07/1948 Age: 70 Gender: Male
 Race: Black/African American Region: Region3 Funding Source: NOW Medicaid ID: N/A ADA Status: N/A Priority: N/A
 Address: 1757 Mary Dell Dr SE, Atlanta, Georgia, Fulton, 30316 Last Updated On: Sep 28, 2018, 9:11:02 AM

Referral and Coaching

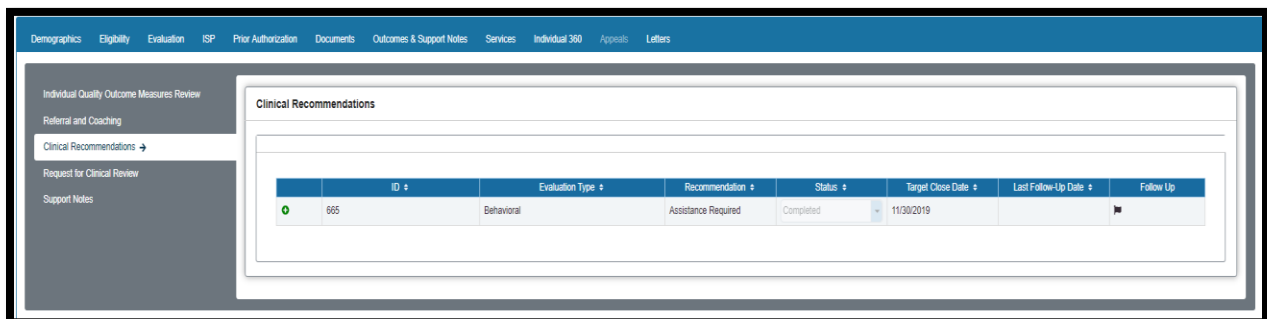
Filter View all Referrals/Coaching

ID	Type	Area	Provider	Date Identified	Status	Last Follow-Up Date	Follow Up
1	Clinical Referral-Critical	Satisfaction	N/A	08/10/2018	Select	N/A	
2	Coaching	Financial	N/A	08/10/2018	Select	N/A	
3	Non-Clinical Referral-Critical	Home/Community Opportunities	N/A	08/10/2018	Select	N/A	
4	Non-Clinical Referral-Critical	Home/Community Opportunities	N/A	08/10/2018	Select	N/A	
5	Coaching	Home/Community Opportunities	N/A	08/10/2018	Select	N/A	

Figure 41: Referral and Coaching

7.2 Clinical Recommendations

- Step 1: Log in IDD Connects portal.
- Step 2: Search an Individual and click on the **CID#** to navigate to Demographic tab of the Individual.
- Step 3: Click on **Outcomes and Supports** Tab, and then click on **Clinical Recommendations** view the Clinical Recommendations.
- Step 4: Click on the (+) to view the details of each Clinical Recommendation.



Demographics Eligibility Evaluation ISP Prior Authorization Documents Outcomes & Support Notes Services Individual 360 Appeals Letters

Clinical Recommendations

ID	Evaluation Type	Recommendation	Status	Target Close Date	Last Follow-Up Date	Follow Up
665	Behavioral	Assistance Required	Completed	11/30/2019		

Figure 42: Clinical Recommendations

Clinical Recommendations

ID	Evaluation Type	Recommendation	Status	Target Close Date	Last Follow-Up Date	Follow Up
665	Behavioral	Assistance Required	Completed	11/30/2019		

Amount: 10 High Priority: Service Type: Behavioral Supports Services
 Unit: Hour(s) Identified By: CT - Clinician One Date Closed: 06/19/2019
 Frequency: Weekly Identified Date: 06/14/2019 Duration of Service: 3

[Follow-Ups](#) Cancel Save

Figure 43: Clinical Recommendations

8 Services and Claims

8.1 Services view only

- Step 1: Log in IDD Connects portal.
- Step 2: Search an Individual and click on the **CID#** to navigate to Demographic tab of the Individual.
- Step 3: Click on **Services** Tab to view the Services Authorizations & Utilizations.
- Step 4: Click on the (+) to view the details of each Service Authorization and Utilization.

Georgia D·B·H·D·D CID: 118587756 First Name: BOBBY Last Name: BLAND DOB: 12/30/1979 Age: 38 Gender: Male

Demographics Eligibility Evaluation ISP Prior Authorization Documents Outcomes & Support Notes **Services** Individual 360 Appeals Letters

Service Authorizations & Utilizations → Export to Excel Print

Views of prior authorization/utilization: Current

Filter

Client Auth #	Service Code	Authorized Units	Units Used	Authorized Amount	Amount Paid
990004618430	VA1	2	0	30	0
Funding Source: COMP IDD PA Number: 0031857818 Client Auth #: 990004618430 Service Code: VA1 Service Description: Vehicle Adaptation Services - Self-Directed Procedure Code: T2039-UC Provider Name: STATEWIDE HEALTH CARE LLC Provider Medicaid ID: 0031857818 Authorized Start Date: 08/03/2018 Authorized End Date: 08/03/2019 Authorized Units: 2 Authorized Amount: 2 Units Used: 0 Amount Paid: 0 Balance Units: 2 Balance Amount: 0					
990004618430	SUP	2	0	305.76	0
990004618430	EN1	3	0	3	0

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Figure 44: Services

8.2 Claims

- Step 1: Log in IDD Connects portal
- Step 2: Search an Individual and click on the **CID#** to navigate to Demographic tab of Individual
- Step 3: Click on **Services** Tab to the claims tab.
- Step 4: Click on **Create Claims** to submit State funded Claims in Provider Connect portal.

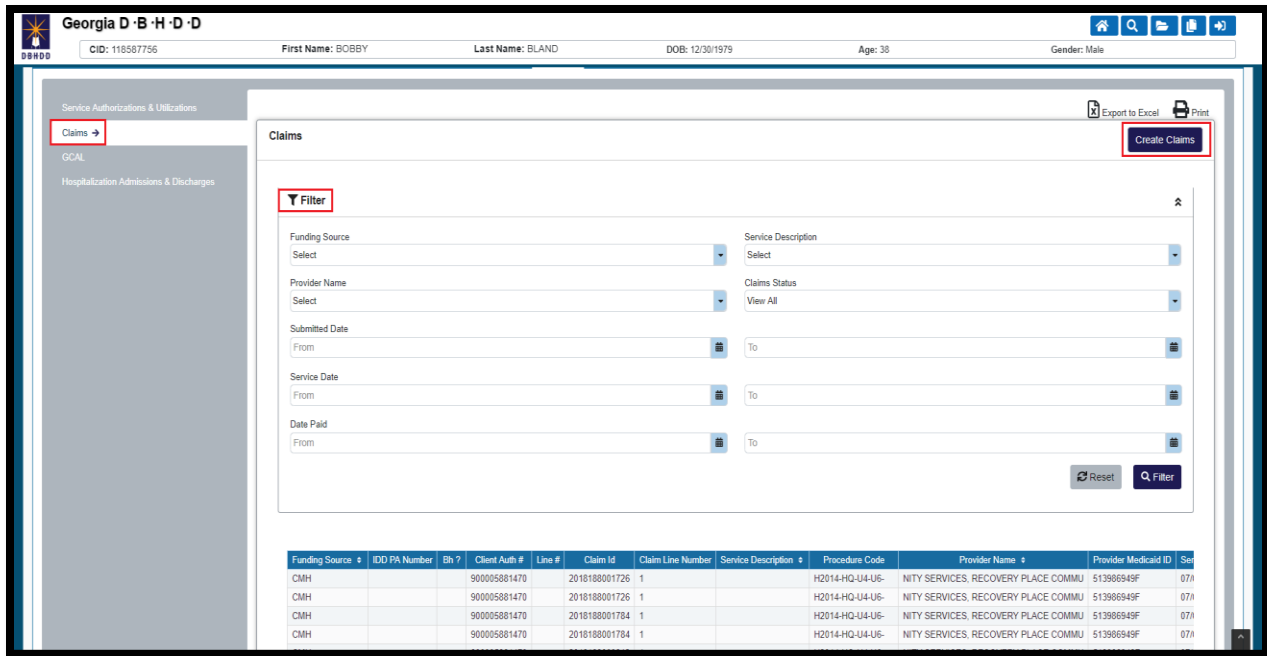


Figure 45: Claims

9. Individual 360

9.1 Status History view only

- Step 1: Log in to the IDD Connects portal
- Step 2: [Search an Individual](#) and click on [CID#](#) to navigate to Demographic tab of the Individual.
- Step 3: Click on the [Individual 360](#) Tab to the Status History tab.
- Step 4: Click on Status History tab to view the information.
- Step 5: Click on Health and Wellness tab.
- Step 6: Click on the Edit Health and Wellness and make updates and then click on the Save button.

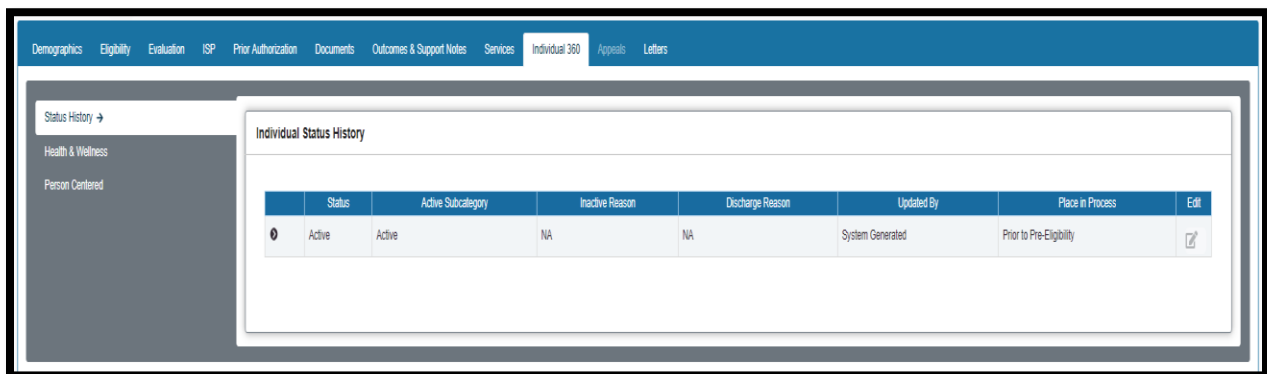
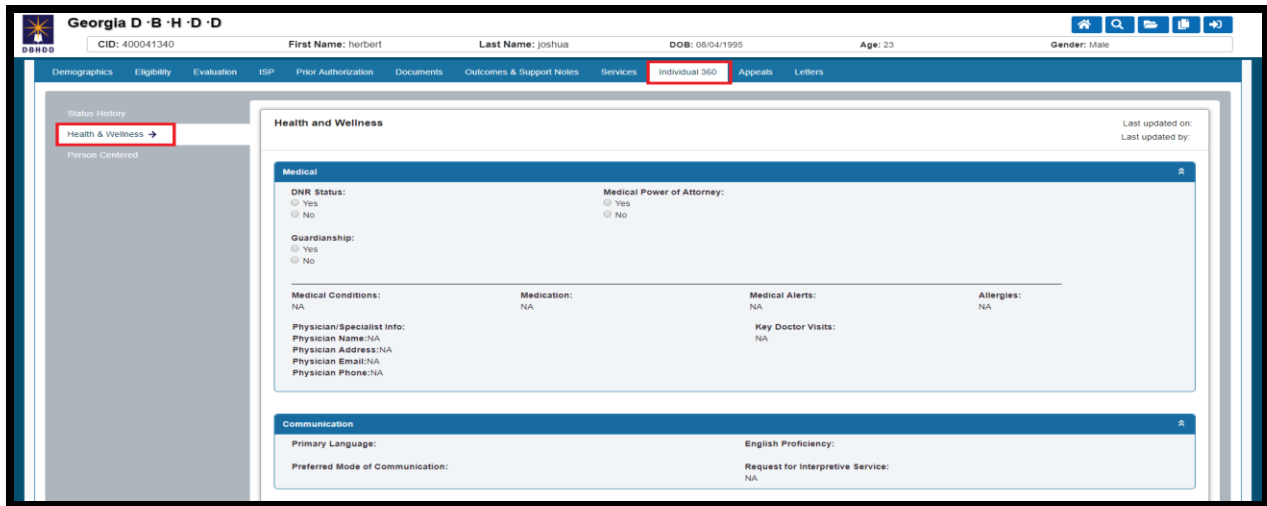


Figure 46: Individual 360



Georgia D · B · H · D · D

CID: 400041340 First Name: herbert Last Name: joshua DOB: 06/04/1995 Age: 23 Gender: Male

Demographics Eligibility Evaluation ISP Prior Authorization Documents Outcomes & Support Notes Services **Individual 360** Appeals Letters

Status History
Health & Wellness →
Person Centered

Last updated on:
Last updated by:

Medical

DNR Status:
 Yes
 No

Medical Power of Attorney:
 Yes
 No

Guardianship:
 Yes
 No

Medical Conditions: NA Medication: NA Medical Alerts: NA Allergies: NA

Physician/Specialist Info:
 Physician Name: NA
 Physician Address: NA
 Physician Email: NA
 Physician Phone: NA

Key Doctor Visits: NA

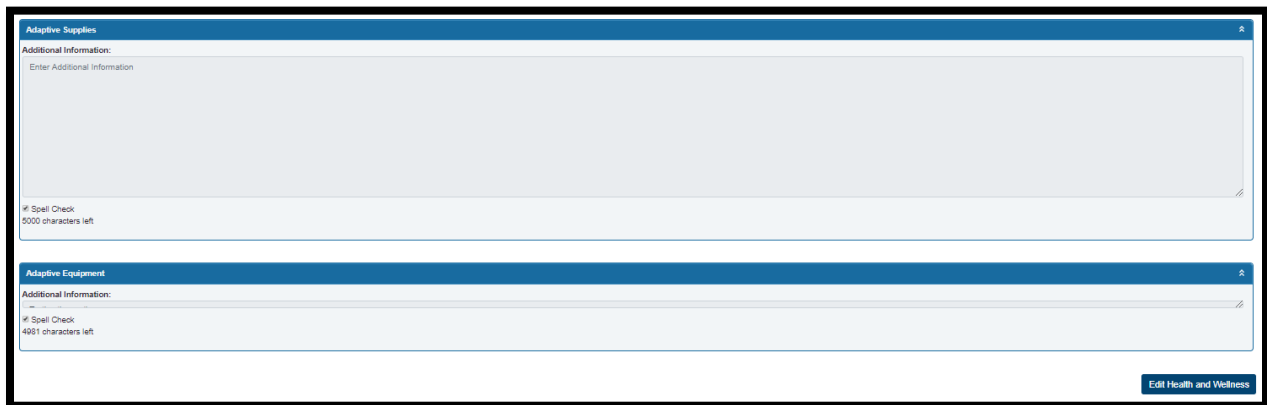
Communication

Primary Language: English Proficiency:

Preferred Mode of Communication: Request for Interpretive Service: NA

Save Cancel

Figure 47: Health and Wellness



Adaptive Supplies

Additional Information:
Enter Additional Information

Spell Check
5000 characters left

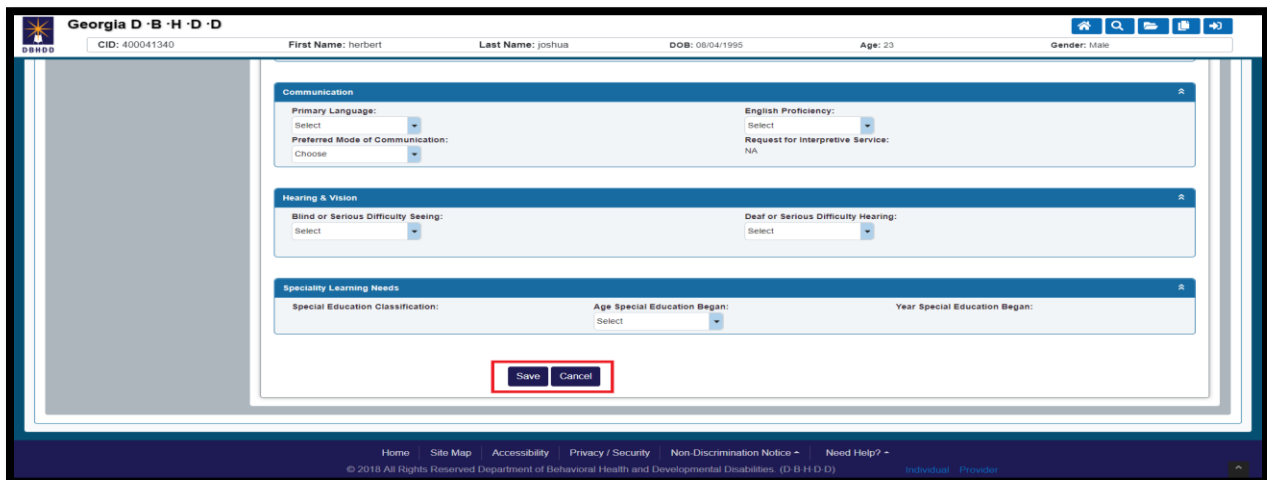
Adaptive Equipment

Additional Information:

Spell Check
4931 characters left

Edit Health and Wellness

Figure 48: Health and Wellness



Georgia D · B · H · D · D

CID: 400041340 First Name: herbert Last Name: joshua DOB: 06/04/1995 Age: 23 Gender: Male

Communication

Primary Language: Select English Proficiency: Select

Preferred Mode of Communication: Choose Request for Interpretive Service: NA

Hearing & Vision

Blind or Serious Difficulty Seeing: Select Deaf or Serious Difficulty Hearing: Select

Specialty Learning Needs

Special Education Classification: Age Special Education Began: Select Year Special Education Began:

Save Cancel

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Figure 20: Health and Wellness