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. Each user of the system accesses the IDD Connects System entering the URL https://IDDgeorgiacollaborative.com/IDDPortal/dbhdd.

**User Role: Clinical Users**

**1.0 Evaluation Tab**

**1.1 Pre-Eligibility Determination Evaluation/Assessment**

To determine pre-eligibility, the psychologist schedules the required evaluation/assessments in pre-eligibility recommendation form. These evaluations/assessments flow in the Clinical Assessment Assignment in the Clinical Mailbox. Once the clinician is assigned, the system triggers a task to the assigned clinician. The clinician completes and submits the evaluation/assessment. The Psychologist completes the PC Report and enters a decision in the Pre-Eligibility Recommendation form, and submits the form. If the psychologist indicates a face-to-face evaluation during scheduling screenings, then the PC report is not required. The Psychologist can upload the face-to-face evaluation and enter a decision in pre-eligibility recommendation form.

**1.1.1 Performing Clinical Information/ Developmental history and milestone/Educational history Assessment**

- 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 the Demographic tab of Individual.
- Step 4: Click on the Evaluation tab.
- Step 5: Click on Additional Evaluation/Assessment card to select the Evaluation/Assessment hyperlink.
- Step 6: Complete the respective screening/assessment template by entering details and click on submit.
Figure 1: Evaluation Tab/ Pre-Eligibility Recommendations

Figure 2: Evaluation Tab/Pre-Eligibility Recommendations
Figure 3: Clinical Information

Figure 4: Educational History

Figure 5: Developmental History and Milestones
1.1.2 Performing Adaptive Behavior Functioning and Fact-to-Face Assessment

- 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 the Demographic tab of the Individual.
- Step 4: Click on the Evaluation tab.
- Step 5: Click on the Additional Evaluation/Assessment card tab and select the Evaluation/Assessment from the drop down box.
- Step 6: Upload the document and click on the Submit button.

Note: The PC report tile name changes to Face to Face evaluation and will be enabled only when Face to Face is indicated in evaluation/screenings by psychologist.

Figure 6: Adaptive Behavior Functioning Assessment
2. Evaluation Tab

2.1 Discipline Specific Assessments

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in the 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 Evaluation tab.
- Step 5: Click on the Discipline Specific Assessments on the left side of the navigation to view assessments.
- Step 6: Select the Discipline Specific Evaluation and click on Create New.
- Step 7: Enter the details and complete the form and click on the Submit button.
Figure 10: Discipline Specific Assessments
2.2 Nursing Assessment

- Step 1: Log in IDD Connects portal.
- Step 2: View Tasks in ‘View My Tasks’ tab
- Step 3: Click on the ‘CID#’ for a particular task to navigate to the Demographic tab of the Individual.
• Step 4: Click on the ‘Evaluation’ tab.
• Step 5: Click on the ‘Discipline Specific Evaluation’.
• Step 6: Select Nursing Assessment and click on Create New. User navigates to the HRST site.

Figure 14: Nursing Assessment

2.3 Create HRST

• Step 1: Login to the IDD Connects 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 the Demographic tab of the 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.

Figure 15: HRST section
2.4 Complete the Support Intensity Scale

- Step 1: Log in IDD Connects portal.
- Step 2: View Tasks in ‘View My Tasks’ tab.
- Step 3: Click on the ‘CID#’ for a particular task to navigate to the Demographic tab of the Individual.
- Step 4: Click on the ‘Evaluation’ tab.
- Step 5: Click on the ‘HRST/SIS’ tab.
- Step 6: Click on ‘Create New SIS’. User navigates to SIS Site.
2.5 Clinical Recommendations

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in the 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 Evaluation tab.
- Step 5: Click on the Clinical Recommendations on the left side of the navigation to view assessments.
- Step 6: Click on the arrow to expand each section to view the recommendations.
2.6 Clinical Mailbox (Individual)

- Step 1: Login to the IDD Connects portal and click on the **Open Tasks** tile.
- Step 2: View Tasks in the **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 **Evaluation** tab.
- Step 5: Click on the **Clinical Mailbox** on the left side of the navigation to view assessments.
- Step 6: Click on the (+) to view the details.

3.0 Outcomes and Support Notes

3.1 Individual Quality Outcome Measures Review
3.1.1 Add/Review Outcome Review

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the Outcomes & Support Notes tab and click on the Individual Quality Outcome Measures Review date hyperlink in the table to open the selected Outcome Review.
- Click on Expand All to open the Quality Outcome Review form.
- Step 5: Complete Outcome selection and Comments for each item within each Focus Area. If ‘Acceptable’ is not selected as the Outcome, the user must complete the required Coaching or Referral fields for each item.

Note: To download the Outcome Review, click on the download button and select download option.

3.1.2 Add Referral and Coaching

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID for a particular task to navigate to Demographic tab of Individual.
- Step 4: Click on Outcomes & Support Notes tab and click on Individual Quality Outcome Measures Review date hyperlink in the table to open the selected Outcome Review form.
- Step 5: Select the Referral type or Coaching in the Outcome column.
- Step 6: Enter details in Add Referral/Coaching pop-up.
- Step 7: Click on the Submit button.
Figure 21: Quality Outcome Review
3.1.3 Referral and Coaching Tab

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on Referral and Coaching tab.
- Step 5: Select the Referral and Coaching ID and select the status of the referral from the drop-down list.
- Step 6: Click on the hyperlink to view the details.
- Step 7: Click on the Outcome Review button to update information. The system displays the Outcome Review section to enter comments and click to close.
- Step 8: Click on the Follow-Up hyperlink to add follow-up details. The system displays a new page to enter the follow-up information and click save.
Figure 24: Referral/Coaching

Figure 25: Referral/Coaching
3.1.4 Clinical Recommendation Tab

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the Outcomes & Support Notes.
- Step 5: Click on the Clinical Recommendation tab.
- Step 6: Click on hyperlink Icon. Click on the Follow-ups button.
- Step 7: Click on the Add New Follow-ups button.
- Step 8: Enter the details and Click on the Save button.
Figure 28: Clinical Recommendations

Figure 29: Clinical Recommendations
3.1.5 Request for Clinical Review (RCR) Tab

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to the Demographic tab of the Individual.
- Step 4: Click on the Outcomes & Support Notes.
- Step 5: Click on the (+) to view the details of requested RCRs and click on ID hyperlink to view previous RCRs completed.
- Step 5: Click on the Request for Clinical Review tab.
- Step 6: Click on the Add a New Request button and click save.
Step 7: Select the Type of Request and enter details and click on the Submit button.

Figure 32: Request for Clinical Review

Figure 33: Request for Clinical Review

Figure 34: Request for Clinical Review
Figure 35: Request for Clinical Review

Figure 36: Request for Clinical Review
Figure 37: Request for Clinical Review

Figure 38: Request for Clinical Review
3.1.6 Clinical Assessment Update

A Request for Clinical Review will be completed and assigned to a Clinician. The information from the RCR will populate in the Clinical Assessment.

- Step 1: Log in IDD Connects portal.
- Step 2: View Tasks in ‘View My Tasks’ tab
- Step 3: Click on ‘CID#’ for a particular task to navigate to the Demographic tab of the Individual.
- Step 4: Click on ‘Evaluation’ tab.
- Step 5: Click on ‘Discipline Specific Evaluation’.
- Step 6: Select the Discipline Specific Evaluation and click on Create New to update the assessment.
- Step 7: Enter details and complete the form and click on submit.

Note: To edit the saved form, click on Evaluation Type hyperlink.
Figure 41: Clinical Assessment Update

Figure 42: Clinical Assessment Update

3.1.7 Support Notes
- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the Outcomes & Support Note.
- Step 5: Click on the Support Notes tab.
- Step 6: Click on Add Support Note button.
- Step 7: Enter details and click save.
3.1.8 View Support Notes

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the Outcomes & Support Note.
- Step 5: Click on the Support Notes tab.
- Step 6: Click on the (+) or the Support Note Date/Time to view the details of the note.
- Step 7: Click the box to Export to PDF the support notes.
4.0 Individual 360

4.0.1 Status History

- Step 1: After Login system displays ‘My Dashboard’ by default.
- Step 2: Search and Individual and click on CID# to navigate to the Demographics page of the Individual.
- Step 3: Click on the ‘Individual 360’ tab.
- Step 4: Click on Status History tab.
- Step 5: Click on Request Status Change.
4.0.2 Health and Wellness

- 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 Individual 360 Tab to the health and wellness tab.
- Step 4: Click on the Edit Health and Wellness button located at the bottom of the screen.
- Step 5: User edits the details and clicks on the Save button.
Figure 48: Health and Wellness

Figure 49: Health and Wellness

Figure 50: Health and Wellness