IDD Connects System
Non-Online Application Process
Central Office User
User Guide

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

User Role: Non – Online Application Process
Central Office Users

1. User Logs into DBHDD Portal and Display of Dashboard

Below are the steps that describe how a DBHDD User logs into the DBHDD portal for IDD Connects System and is navigated to the user’s Dashboard. The Dashboard displays the User’s Tasks, Notifications and Messages. Depending on the User, the Dashboard will also have a Clinical Mailbox.

1.1 User Logs In

- Step 1: Launch web browser (i.e. Google Chrome, Safari, Fire Fox, and Internet Explorer).
- Step 2: Enter URL in the search bar and click enter to open the DBHDD Login page.
- Step 3: Enters Username and Password in the IDD Connects System.
- Step 4: Click Login.
1.2 User Searches for an Individual to determine if an application has already been entered or completed.

- Step 1: After Login system displays My Dashboard by default.
- Step 2: Click on Search an Individual tab.
- Step 3: Enter search criteria and click on the filter button.
- Step 4: Click on the CID to navigate to the demographics page of Individual.
2. Non-Online Application Process

The steps below describe the submission of an application received by mail, fax, telephone, or in person. The Central Office User enters information in each section of the application under the Application tab.

2.1 Individual’s Basic Demographic Information

- Step 1: Log in IDD Connects System.
- Step 2: Click on the Application tab
- Step 3: Click on the Submit New Application tab

2.2 Application Details

- Step 1: Go to Application Details tab.
- Step 2: Enter all the required fields in this section.
  - The user checks off how the application was received: Mail, Fax or Telephone. If the user selects Telephone, a check by appears for the user to ensure verbal consent was provided by the applicant or designee to enter the application online. Other information such as who entered the application into the system, the date the
application was entered into the system, the date when the application was received by the Central Office (CO) or Field Office (FO) (note: this date should be the same date).

- Step 3: Click on the **Save** and **Next Page** button.

![Figure 5: Application Received Details Page](image)

2.3 Individual Demographic Information

- Step 1: Click on the **General Information** tab.
- Step 2: Enter the required fields in this section.
- Step 3: Click on the **Save** and **Next Page** button.
2.4 Applicant’s Primary Contract Details and Mailing Address

- Step 1: Complete all the required sections.
- Step 2: If the mailing address is the same as the applicant’s, check the checkbox.
- Step 3: Click on the Save and Next Page button.
2.5 Legal Status and Guardian Information *(Marked No)*

- Step 1: Click on the Legal Status and Guardian tab.
- Step 2: Enter the required fields in this section.
- Step 3: Click on the Save and Next Page button.

![Figure 9: Legal Status and Guardian Page](image)

2.6 Guardian Information *(Marked Yes)*

- Step 1: Click the Yes button.
- Step 2: Enter the required fields under the Add/Edit View Legal Guardian section.
- Step 3: Click on the Save and Next Page button.

![Figure 10: Add/Edit View Legal Guardian Screen](image)
2.7 Communication, Hearing, and Vision

- Step 1: Click on the Communication, Hearing, Vision tab.
- Step 2: Enter the required fields in each section.
- Step 3: Click on the Save and Next Page button.

![Figure 11: Communication, Hearing, Vision Information](image1)

2.8 IDD Diagnosis, Resources and Referrals

- Step 1: Click the IDD Diagnosis, Resources and Referrals tab.
- Step 2: Enter the required fields in each section.
- Step 3: Click on the Save and Next Page button.

![Figure 12: IDD Diagnosis, Resources and Referrals](image2)
2.9: Physician Details

- Step 1: Click to navigate to the Physician Details tab.
- Step 2: Enter the required fields in each section.
- Step 3: Click on the Save button and the record populates in the table.
- Step 4: Click on the Save and Next Page button.

![Physician Information](image)

**Figure 13: Physician Information**

2.10: Application Supporting Documents

- Step 1: Click the Application Supporting Documents tab.
- Step 2: Select the document type from the drop down arrow box.
- Step 3: Click on the choose file button and a new page displays the document folder from your computer.
- Step 4: Select the saved document from your computer.
- Step 5: Click on the Upload button.
- Step 6: Click on the Save button.
2.11: Application Signature

- Step 1: Click to navigate to the Application Signature tab.
  - Note: All other sections of the application must be completed (demonstrated by the check mark next to the section) to access the Application Signature page.
- Step 2: Click on the checkbox.
- Step 3: Click on the Submit Application button.
Figure 16: Letters page

Figure 17: Send a Letter page

*Note: If selected to email, the system will direct you to the email system to complete this action. If selected to fax, the system will display a new page to enter fax information.*

3.2 Generate a Letter (Enter USPS Tracking Label)

- Step 1: Login to the IDD Connects System.
- Step 2: Search an Individual and click on the CID# to navigate to Demographic tab of Individual.
- Step 3: Click on the Letters tab.
- Step 4: Click on the edit icon of the selected letter and the USPS Tracking Label displays.
- Step 5: Click on the save icon.

Figure 18: Enter USPS Tracking information

3.3 Complete Drafted Letter

- Step 1: Login to the IDD Connects System portal.
- Step 2: Search an Individual and click on the CID# to navigate to Demographic tab of Individual
- Step 3: Click on the Letters tab.
- Step 4: Select the type of letter.
- Step 5: Click on the Letter ID.
- Step 6: Click on the Preview Letter and the system navigates to LetterConnect system to the drafted letter.
- Step 7: Select the Finalize and Sign button to complete the letter or select the Changes Recommended button to enter comments for editing the current drafted letter.

Note: If the User select the Finalize and Sign button to complete the letter, follow the steps to select how to send the letter and complete the Disclaimer.
Figure 19: Letters page, completed or in draft

Figure 20: Letters page, Save as Draft or Preview Letter button
Region 3 Field Office  
3073 Panthersville Rd  
Building 10  
Decatur Georgia 30034

2018-08-14

VIA CERTIFIED MAIL  
Test Test  
1757 Mary Dell Dr SE  
Atlanta Georgia 30316

Re: Additional Information Request for InfoSysTest AugSixteenFirst

To Whom it May Concern:

The Region 3 Field Office is requesting following documents for the purposes of trafficking. To assist you, we have identified the information that we require during this time.

Figure 21: Letter connects site, finalize letter or recommend changes

Changes Recommended

Who will edit this letter:*  
- Me  
- Send back to Letter Creator

Manager’s Name:*  

Comments:*  

Cancel  Ok

Figure 22: Changes Recommended section
4. Assign or Modify a Task

Once an application is completed, the system will automatically assign the task of reviewing the application to an Application Reviewer. If necessary, the Central Office Manager can re-assign the task to another Application Reviewer.

4.1 View My Staff’s Tasks

- Step 1: Click on View My Staff’s Tasks.
- Step 2: Identify the staff person by clicking on the hyperlink (person’s name) or the plus sign next to the staff’s name. Screen will display the staff person’s tasks.
4.2 Add a New Task

- Step 1: Click on the Add New Task tab
- Step 2: Click on the Search icon to find the DBHDD Application Reviewer to whom you will assign the task.
- Step 3: Search for the Applicant’s record by the CID#, Last Name, or First Name.
- Step 4: Click the radial button to select the record to assign to the Application Reviewer.
- Step 5: Identify the Type of Task and Task Description.
- Step 6: Identify the Due Date of the task and if High Priority, click on the High Priority checkbox.
- Step 7: Click on the Save or Cancel button.
4.3: Modify a Task Assignment

- Step 1: Select a task to modify.
- Step 2: Click on the **Modify** button.
- Step 3: Select the date by clicking on the calendar icon or manually enter the date.
- Step 4: Click on the box to identify the task as ‘high priority.’
- Step 5: Update the assignment by clicking the **Search** button under Updated Owner column.
- Step 6: Enter the reason for the reassignment.
- Step 7: Click the **Save** or **Cancel** button.
Figure 28: Modify a Task

Figure 29: Modify the Due Date, Identify as High Priority, Update Owner, Reason for Reassignment