IDD Connects System
User Guide
Planning List Administrator (PLA)
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.

1. Staff’s Tasks, Add New Tasks, Modify Tasks, and Reassign Tasks

The below section is for Supervisor/Manager level staff to modify, add, and reassign staff’s tasks.

1.1 View My Staff’s Task

- Step 1: Click on My Dashboard tab and the system displays View My Tasks.
- Step 2: Click on the View My Staff’s Task tab to view assigned staff and staff’s task. My Staff’s Task section displays a column for the Number of Individuals Supported, the Number of Tasks, and the Number of Past Due Tasks.
- Step 3: Click on the Staff Member’s Name to view tasks assigned to that particular staff member.

![Figure 1: View My Staff's Task](image-url)
1.0 Add Staff’s Tasks

- Step 1: Click on Staff Member’s name to view tasks assigned to the staff member. The system displays a new screen to add or modify staff assignments.
- Step 2: Click on Add new task button.
- Step 3: Click on the Search Icon to select individual.
- Step 4: Enter type of task as desk review and the task description.
- Step 5: Click on the Save button.

1.2 Modify Staff’s Tasks

- Step 1: Click on Staff Member’s name to view tasks assigned to the staff member. The system displays a new screen to add or modify staff assignments.
- Step 2: Select the task and click on the Modify button.
- Step 3: Enter Details, Assign User and Click Save.
1.3 Reassign Staff’s Tasks

- Step 1: Click on Staff Member’s name to view tasks assigned to the staff member.
- Step 2: Select the specific task by checking the box next to the task. The system opens new fields to select another staff using the search icon and enter the reason for the reassignment.
- Step 3: Click the Reassign button to make changes to the staff assignment.
2. Clinical Mailbox

All Pre-Eligibility Screenings/Evaluation or Discipline Specific Evaluation are available to view in the Clinical Mailbox. Pre-eligibility screening/evaluation request populates in the Clinical Assessment Assignment. All of the discipline specific evaluation/screening requests (i.e., initial, Request for Clinical Review (RCR)) populate in the Clinical Requests section. The Intake & Evaluation (I&E) manager reviews the clinical request and assigns task to clinicians. Once approved, the request flows into the Clinical Assessment Assignment section and the staff receives the notification and task assignment. For the
Support Intensity Scale (SIS) request, only the SIS manager can make the determination in the clinical request section to approve and assign staff to complete the SIS.

2.1 Clinical Mailbox Request

- Step 1: Click on My Dashboard tab and the system displays the Clinical Mailbox tab. Under the Clinical Mailbox, there are two options to select, the Clinical Mailbox Requests tab and the Clinical Assessment Assignments tab.
- Step 2: Click on the Clinical Requests to view clinical requests. The filter capability is available to search for specific clinical request.

![Clinical Mailbox Tabs](image9.png)

**Figure 9: Clinical Mailbox Tabs**

![Clinical Mailbox Requests](image10.png)

**Figure 10: Clinical Mailbox Requests**

![Clinical Assessment Assignments](image11.png)

**Figure 11: Clinical Assessment Assignments**
2. Eligibility Tab of the Individual’s Record

The Eligibility section of the individual’s record covers the Pre-Eligibility tasks for a PLA. This section describes the systems functionality to complete tasks for updating the individual’s contact list, complete the financial screening template, schedule and enter needs assessments results, and request state funds.

2.1 Update Individual’s Contact under the Eligibility Status tab

- Step 1: Under the eligibility tab section of the individual’s record, click on Eligibility Status tab.
- Step 2: Click on Add New Contact button to update contact information. The system displays a new page for you to enter the new contact.
- Step 3: Enter the information in the required fields to add the new contact information and click on the Add Contact button. Enter the type of contact, name, and relationship to the individual. If the new contact type is the primary contact, the system will label the previous primary contact as other. The system will only identify one primary contact.
- Step 4: Enter a support note under the Outcome and Support Note tab. (Refer to the Outcome and Support section for further instructions on how to enter a support note.)
2.2 Financial Screening and Needs Assessments

2.2.1: Financial Screening Template

- Step 1: Under the Eligibility section of the individual’s record, click on the Financial and Needs Assessment tab.
- Step 2: Click on Complete New Financial Screening button and enter details. The financial screening form is an available optional and available to complete in the system as needed.
- Step 3: If the financial screening is compete, click on the Save button.
2.2.2 Needs Assessments

- Step 1: Under the eligibility section of the individual's record, click on the Financial and Needs Assessment tab.
- Step 2: Click on Add New Scheduled Assessment and enter details.
- Step 3: Click on the Save button.

- Step 4: Once the need assessments are scheduled, click on the Add New Urgent Needs Assessment/Add New Support Needs Assessment button and enter the required fields.
- Step 5: Click the Save button.
2.3 Funding and Resource Assignment

2.3.1 Individuals with Waiver Funding Assigned to Planning List Administrator

- Step 1: Under the eligibility section of the individual’s record, click on the Funding tab.
- Step 2: Select funding type and assign PLA.
- Step 3: Click the Save button.

2.3.2 Individuals with State Funding Assigned to State Service Coordinator (SSC)

- Step 1: Under the eligibility section of the individual’s record, click on the Funding tab.
- Step 2: Click on the Funding tab.
• Step 3: Select SSC.
• Step 4: Click the Save button.

Figure 21: Funding and Resource Assignment for State Service Coordinator

2.3.3 Individual with Waiver Funding Assigned to Support Coordination (SC) Agency
• Step 1: Under the eligibility section of the individual’s record, click on the Funding tab.
• Step 2: Select Assigned SC Agency.
• Step 3: Click the Save button.

Figure 22: Funding and Resource Assignment

2.3.4 Request State Funds
• Step 1: On the Dashboard page in the View Tasks in View My Tasks tab.
• Step 2: Click on the CID for a particular task to navigate to Demographic tab of Individual
• Step 3: Click on the Eligibility tab.
• Step 4: Click on the Funding tab.
• Step 5: Select Assigned SC Agency.
2.4 Level of Care (LOC) – GMCF Determination

- Step 1: Under the eligibility section of the individual’s record, click on the LOC tab.
- Step 2: Click on Add a New LOC Determination button.
- Step 3: Complete all sections to add GMCF LOC Decision required fields and click the Save button.
3. Evaluation Tab of the Individual’s Record

3.1 Health Risk Screening Tool (HRST)

- Step 1: Under the Evaluation tab of the individual’s record, click on HRST/SIS tab.
- Step 2: Click on the Create New HRST. The system links to the HRST website and displays the login page.
- Step 3: Enter the HRST login information and complete the HRST assessment. Once completed, the HRST report populates under the HRST Section in the IDD Connects system. Click on the HRST date hyperlink to view the report.
3.2 Access Support Intensity Scale (SIS)

- **Step 1:** Step 1: Under the Evaluation tab of the individual’s record, click on the HRST/SIS tab.
- **Step 2:** To view the SIS, click on the SIS date hyperlink and the system navigates to the SIS website to view the report. Click on the plus sign icon and the page expands to view additional information from the SIS report.

4. **Individual Service Plan (ISP) tab of the Individual’s Record**

4.1 Create ISP

- **Step 1:** Under the ISP tab of the individual record, click on the Create New ISP button, select the ISP Type, and click Ok.
- **Step 2:** Click on ISP Type and the sections of the ISP template displays.
- **Step 3:** Complete all sections under the ISP Content completed section and Click on the submit button. To access the sections under the ISP content section, click on the dropdown arrow.
4.2 ISP Current Needs

- **Step 1:** Click on the **ISP Content Completed** dropdown arrow to access the **Current Needs** section. The HRST and SIS information populates into the ISP directly from HRST Online and SIS Online. By clicking the hyperlink, the report is available to download a copy of the most current HRST and SIS.

- **Step 3:** Click on the SIS Domains and the page expands displaying detail information for each domain.

- **Step 4:** Select the **Consideration of PBSP/Safety Plan (when applicable)**. Click the yes/no button to indicate if a PBSP or Safety Plan is in place or needs to be developed due to an assessment or team decision. Add comments, enter the PBSP/Safety Plan due date, and click Save.
Figure 30: Current Needs Page, HRST and SIS Results

Figure 31: Exceptional Medical Supports and Exceptional Behavior Support Section of the SIS
4.3 ISP Clinical Recommendations
- Step 1: Click on the ISP Content Completed dropdown arrow to access the Clinical Recommendation section. The system populates the assessments recommendations to review. Click on the plus sign icon to view the detailed information from the assessment.
- Step 2: Complete the Accept and Acknowledgement of the clinical recommendations.

4.4 ISP Goals
- Step 1: Click on the ISP Content Completed dropdown arrow to access the Goals section.
- Step 2: Answer the ISP Person Centered Work Goal questions. Some questions will populate additional question to answer or a text box to enter comments.
- Step 3: Select the Type of Goal from the dropdown box and enter Person Centered Goals.
- Step 4: Enter the description and click the Add button and the goal populates into the goal table.
- Step 5: Enter the Individual’s Strengths related to the goal.
- Step 6: Complete the Action Plan description.
- Step 7: Click on the Add Desired Outcome/Goal button.
- Step 8: Click Save when completed.
Figure 34: Person Centered Work Goals

Figure 35: Person Centered Goals Description
Figure 36: Individual Strengths

Figure 37: Action Plan
Figure 38: Outcome Section

Figure 39: The system displays alerts when information is missing.

4.5 ISP Service Summary

- Step 1: Click on the ISP Content Completed dropdown arrow to access the Service Summary section.
- Step 2: Click to select the detail description for each line item.
- Step 3: Enter the required fields in the table.
- Step 4: Click on the save button.
- Step 5: To add a service select from the drop box and click the Add New Services button. *(when applicable)*
- Step 6: To remove a service select the service to remove and click the Remove Service button. *(when applicable)*
4.6 ISP Informed Choice

- Step 1: Click on the ISP Content Completed dropdown arrow to access the Informed Choice section.
- Step 2: Complete all the required fields.
- Step 3: Click on the save button.
4.7 ISP signature Page

- Step 1: Click on the ISP Content Completed dropdown arrow to access the Signature section.
- Step 2: Click in the Add a New Participant button to enter meeting attendees.
- Step 3: Download the Signature page.
- Step 4: Enter the ISP meeting date.
- Step 5: After the meeting is completed, select a participant from the list of participants and Upload the Signature Page from the ISP meeting.
- Step 6: Click on the box to indicate the Individual has Agreed to and Approved the ISP.
- Step 7: Click the save button and click the submit button.
Figure 45: Add Participant Page

Figure 46: Add Participant Template
4.8 ISP Approval Process

4.8.1 Assist Individual to Review and Approve the ISP

- Step 1: Under the ISP navigation bar, click on the Individual Approval section.
- Step 2: Click on the Approve Individual Service Plan tile
- Step 3: Enter the approval decision and the other details and click on the Submit button.
4.8.2 Final Approval

- Step 1: Under the ISP navigation bar, click on the Final Approval section.
- Step 2: Enter the Approval Decision and other details and click on the Submit button.
5. Prior Authorizations (PA) Section of the Individual’s Record

5.1 Add Providers to the PA

- Step 1: Click on the PA section of the individual’s record.
- Step 2: Click on the Create PA button.
- Step 3: Select the start and end dates for the PA.
- Step 4: Click on the search icon to select the provider and add comments if needed.
- Step 6: Click on the Submit button.

![Figure 51: Add Provider to PA, Create PA](image1)

![Figure 52: PA Start/End Date, Search for Provider Icon](image2)
6. Outcomes & Support Notes Section of the Individual’s Record

6.1.1 View Support Note

- Step 1: Under the navigation bar, click on the Support Notes tab.
- Step 2: To view a Support note, click on the plus sign icon. The support note section expands displaying the support note information. Another option is to click on the hyperlink date of the support note to view the support note information.
- Step 3: To download support note(s), click on the box next to the left side of the support note. The system allows you to select multiple support notes to view, download, and print.
- Step 4: Click on the Export to PDF button.
6.1.2 Add Support Note

- Step 1: Under the navigation bar, click on the Support Notes tab.
- Step 2: Click on the Add Support Note button and the system displays the support note template.
- Step 3: Enter the required fields using the icons to enter the date and time.
- Step 4: Select the Note Category, Note Subcategory, and Contact Type from the dropdown box.
- Step 5: (Optional) If a referral/coaching is needed, click on the Add Referral/Coaching hyperlink to enter the information before completing the support note.
- Step 6: Click on the save button.
7. Letters

7.1.1 Generate a Letter

- Step 1: Click on the Letters section of the individual’s record.
- Step 2: Select the Type of Letter from the dropdown box and click on the Create Letter button.
- Step 3: Enter the information in the required fields and click on Save as Draft button. Once the letter is saved in draft, the system sends a notification to the designated staff to review and finalize the letter.
7.1.2 Finalize Letter in Draft

- Step 1: Click on **Letter ID** created for the drafted letter under the Letter ID column. The system displays the letter page.
- Step 2: Click on the **Preview Letter** and the system navigates to the Letter Connects system displaying the drafted letter.
- Step 3: Select the **Finalize and Sign** button to follow the steps to complete the letter or select the **Changes Recommended** button to enter comments for editing the current drafted letter. The system sends a notification to the letter creator to update the letter.
When finalizing a letter, LetterConnect provides some options for sending the letter to the letter recipient. Email, fax, or print to mail a letter. When adding information to the letter template, review the entire letter for clarity before finalizing the letter.

Figure 60: Letter ID Column

05/08/2019

VIA CERTIFIED MAIL
TEST APPLICATION
163 E TOLLISON ST
Baxley, Georgia 31513

Re: Additional Information Request to Complete Application for TEST APPLICATION

Dear Miss TEST APPLICATION,

The Region 5 Intake and Evaluation Office has received TEST APPLICATION’s application for Intellectual/Developmental Disability Services. However, we are unable to begin the preliminary eligibility determination process until a complete application packet is received. In an attempt to assist you, we have marked the information that we require to begin the preliminary eligibility determination process below.

Figure 61: Drafted the Letter via Letter Connects System
Figure 62: Changes Recommended section

Figure 63: Finalize Letter Disclaimer
7.1.3 Certified Letter (Enter USPS Tracking Label)

- Step 1: Click on the Letters section of the individual’s record.
- Step 2: Click on the edit icon of the selected letter and click on the pencil icon for the USPS Tracking Label displays.
- Step 3: Enter the USPS Tracking number and click on the save icon.