IDD Case Management System
Providers
User Guide
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
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 describe 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 is [https://idd.georgiacollaborative.com/IDDPortal/provider](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**.

![Figure 1: IDD Connects System](image)

### 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
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.

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.
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.

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.

Figure 8: Messages

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.
Figure 10: Search an Individual Page

Figure 11: Demographics Page

Figure 12: Individual’s Basic Demographic Information
Figure 13: Individual's Current Physical and Mailing Address

Figure 14: Minor/Legal Guardian Information

Figure 15: Contacts Information
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.
3. Individual Service Plan (ISP)

3.1 Accessing ISP

- 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](image1)

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

![Figure 20: Historical ISP](image2)
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.

Figure 21: ISP

Figure 22: Exceptional Medical 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.
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 Goals](image)

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 Service Summary](image)
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.

![ISP Informed Choice](image)

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.

![ISP Signature](image)

Figure 28: ISP
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.
Figure 30: ISP

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](image)

![Figure 33: Documents](image)

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.
Figure 34: Documents

Sending a Document using Internal Message

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 downloaded is complete.
Do you still wish to continue?

Yes  Cancel

Figure 35: Documents

Sending a Document using Internal Message

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 Authorization Figure 39](image1)

**Figure 39: Prior Authorization**

![Prior Authorization Figure 40](image2)

**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.

![Figure 41: Referral and Coaching](image)

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 to view the Clinical Recommendations.
- Step 4: Click on the (+) to view the details of each Clinical Recommendation.

![Figure 42: Clinical Recommendations](image)
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.

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.
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 47: Health and Wellness

Figure 48: Health and Wellness

Figure 20: Health and Wellness