IDD Connects System
Psychologist User Guide

Disclaimer: Please note that screens used in this presentation are for demonstration purposes only and actual content may vary.
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 Case Management System and a description of the screen. Each user of the system accesses the IDD Case Management System entering the URL: https://idd.georgiacollaborative.com/IDDPortal/dbhdd

1. Review Submitted Application

The psychologist receives a task to review a submitted application. The steps below describes the process for the Psychologist to review a submitted application.

1.1 Psychologist Reviews submitted Application

- Step 1: Log into the IDD Connects system and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the individual’s CID # under the column labeled CID # to navigate to the Demographic tab of individual.

![Figure 1: Individual’s CID#](image)

- Step 1: Click on the Eligibility tab to view the Eligibility Status tab. Eligibility status bar shows the application is under review.

Note: Under the Eligibility tab, the Psychologist reviews the application and contacts the field office staff to obtain the needed documents. The documents received as well as additional documents requested are done by the Regional Field Office, who receives a task in the IDD Connects system. Once the documents are received, the Regional Field Office staff will upload the document in the system.
Step 3: Click to navigate to the Application Details tab.
Step 4: Click on Review Application and the system will display the application.

Step 5: Complete the required fields for additional notes and the outcome in the Additional Documents Required Checklist section.
If Psychologist determines the outcome as sufficient – proceed to step 6. If Psychologist determines the outcome as insufficient – select the additional documents for staff to request. The system will notify the Psychologist when the application is ready to be reviewed again and proceed to step 6.

- Step 6: Click on the Save and Close button.

Figure 5: Additional Documents Required Checklist

Figure 6: Insufficient Outcome, Request for Additional Documentation and Follow Up

2. Scheduling Evaluations and Pre-Eligibility Screenings

Once the application review process is complete, the Psychologist clicks on the evaluation tab to initiate the pre-eligibility determination process. As part of the pre-eligibility determination of an Individual, the Psychologist schedules evaluations or pre-eligibility screenings for staff to perform. When the
Psychologist selects the specific evaluation/pre-eligibility screenings and clicks on the schedule button, the systems assigns the screenings under the clinical assessment assignment section under the clinical request tab where they are assigned to staff. Once all the screenings/evaluation are completed, the Psychologist will receive a task/notification to complete the Psychological Consultation report and enters the pre-eligibility decision in pre-eligibility recommendation form.

2.1 Psychologist schedules the evaluations or pre-eligibility screenings:

- Step 1: Log in the IDD Connects System and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the individual’s CID # under the column labeled CID # to navigate to the Demographic tab of individual.
- Step 4: Click on Evaluation tab.
- Step 5: Click on Initiate Pre-Eligibility Screening button. The system populates the Pre-Eligibility Screening Form.

Figure 7: Pre-Eligibility Recommendations
Figure 8: Pre-Eligibility Screening

- Step 6: View the Demographic Information and DBHDD Behavioral Health Service History information. Note: The Behavioral Health Service History data populates from the Connection Administrative System (CAS), which is a CONNECTS applications (authorizations, claims, membership, providers, benefits, etc.), when applicable.

Figure 9: Demographic Information
Step 7: Select "Yes" for determining additional evaluations or pre-eligibility screenings are needed to assist with the pre-eligibility determination.

Step 8: Select the screenings and click on the Schedule button. The selected evaluations/screenings will populate in the Screening Summary table showing status as requested.

Step 9: Go to section VI. Comments of the Pre-Eligibility Screening, enter comments, and click on the Submit button.
Note: Psychologist can delete the scheduled screenings by clicking on the delete option. The status will show the deleted screening as cancelled in the screening summary table.

Once a staff is assigned to schedule a screening in the clinical assessment assignment, then the status of the screening changes to **In-progress**. Once the screening is completed and submitted by staff, then the status changes to **Completed** in the screening summary table.

When the assessments have been completed by the assigned staff, the Psychologist receives a task/notification. The Psychologist clicks on the assessment type hyperlink in the Screening Summary table to view the results of the assessment/screening. The Psychologist will add comments and upload additional documents if applicable.

If the face to face evaluation is selected, the Psychologist clicks on the assessment hyperlink in Screening Summary Table. The Psychologist uploads the documents and enters Decision as Pre-Eligible and the Date of Assessment and clicks the Submit button. The status of the Face to Face Evaluation in the
Screening Summary Table is updated to reflect as Completed and the system sends a notification to psychologist who requested the screening. Add comments and upload additional documents if applicable.

2.2 Upload the Face to Face Psychological Evaluation

- Step 1: Log into the IDD Connects system and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the individual’s CID # under the column labeled CID # to navigate to the Demographic tab of individual.
- Step 4: Click on Evaluation tab
- Step 5: Click on Additional Evaluation/Assessment tile. Click on the face to face evaluation hyperlink. Or, click on the Face to Face tile to upload the Face to Face Psychological Evaluation.
- Step 6: Upload the document and click on Submit.

![Figure 15: Face to Face tile](image)

Note: The Psychological Consultation report tile name changes to Face to Face evaluation and will be enabled only when Face to Face is indicated in the evaluation/screenings by psychologist.
Figure 16: Face to Face Psychological Evaluation

Additional Evaluations/Screenings for the Psychologist process:

- This section is to indicate if testing needs to be done or more information needs to be gathered via an interview.
- If you select one of the first four options, Clinical Information, Developmental History, Educational History, or Adaptive Behavior, a data gathering task will be assigned to someone in the field. If you want to gather the information yourself, select face-to-face evaluation.

- If you select “no” here, you will then indicate the application is complete and the calendar will appear to stamp the date and start the 14-day timeline.
2.3 Psychologist indicates no screenings are required

Once all identified screenings are completed by the staff, the system notifies the Psychologist that all screenings are completed. The Psychologist indicates that no further screenings are needed and submits the application. The system assigns a task to complete the PC report if the face to face evaluation is not indicated.

- Step 1: Log in IDD Connects system and click on the Open Tasks tile.
- Step 2: View Tasks in View My Notifications tab.
- Step 3: User Searches an Individual and clicks on the ‘CID’ to navigate the Demographic tab of Individual.
- Step 4: Click on the Evaluation tab.
- Step 5: Click on the Pre-eligibility Screening Recommendations tile.
- Step 6: After viewing the demographic and Behavioral information, if no additional documents/information is needed, the Psychologist will select ‘No’ under the Psychologist Decision for Pre-Eligibility Screening section.
- Step 7: Select Is Application complete checkbox in Psychologist Decision for Pre-Eligibility Screening section. Enter comments and click on Submit.
- Step 8: System generates a task to complete PC report and enables PC report tile (if face to face evaluation was not indicated).

Note:

Once you receive all the information you need (conduct testing, obtain background history, etc.) you will indicate that the application is complete. A calendar will appear and your 14 day timeline will begin.
3. Psychologist completes the Psychological Consultation Report (PC)/Second Opinion of Psychological Consultation report (SOPR)/Initial Level of Care (LOC) Report

The Clinician completes all the indicated screenings. The Psychologist checks the ‘Is Application complete?’ checkbox, then enters comments and submits the pre-eligibility recommendation form. The system generates a task for the psychologist to complete Psychological Consultation report (PC). The PC Report tile is enabled if the face to face evaluation was not indicated for completion. The Psychologist completes the PC report. If the decision in the PC Report is Ineligible, then a Second Opinion Psychological Report (SOPR) needs to be completed by the second Psychologist. Below are scenarios for the Eligibility process:

<table>
<thead>
<tr>
<th>SCENARIOS</th>
<th>PCR Decision on Report</th>
<th>SOPR Decision on Report</th>
<th>Pre-Eligibility Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scenario 1 - Eligible (1st-Eligible)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Step1</strong></td>
<td>PCR Done - Eligible</td>
<td>Eligible</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Scenario 2 - Ineligible (1st-Ineligible, 2nd-Ineligible w/o consult)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Step1</strong></td>
<td>PCR Done - Found</td>
<td>Ineligible</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Ineligible, Second</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Opinion Requested</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Step2</strong></td>
<td>SOPR Done - Found</td>
<td>Ineligible</td>
<td>Concur</td>
</tr>
<tr>
<td></td>
<td>Ineligible, 2nd</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Psychologist will enter</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SOPR decision</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Step3</strong></td>
<td>1st Psychologist to</td>
<td>Ineligible</td>
<td>Concur</td>
</tr>
<tr>
<td></td>
<td>update the final</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>decision to</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ineligible</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Scenario 3 - Eligible (1st-Ineligible, 2nd-Eligible after consult)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Step1</strong></td>
<td>PCR Done - Found</td>
<td>Ineligible</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Ineligible, Second</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Opinion Requested</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Step2</strong></td>
<td>SOPR Done - Found</td>
<td>Ineligible</td>
<td>Pending Consultation</td>
</tr>
<tr>
<td></td>
<td>Eligible, Need to</td>
<td></td>
<td>(Auto-update)</td>
</tr>
<tr>
<td></td>
<td>consult 2nd Psychologist</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>will enter SOPR</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>decision</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Step3</strong></td>
<td>2nd Psychologist will</td>
<td>Original Report -</td>
<td>Consultation Complete</td>
</tr>
<tr>
<td></td>
<td>change decision on SOPR</td>
<td>Ineligible</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Consultation Complete</td>
<td></td>
</tr>
<tr>
<td><strong>Step4</strong></td>
<td>1st Psychologist will</td>
<td>Original Report -</td>
<td>Consultation Complete</td>
</tr>
<tr>
<td></td>
<td>add a PCR addendum, and</td>
<td>Ineligible</td>
<td></td>
</tr>
<tr>
<td></td>
<td>will update Pre-Eligibility</td>
<td>Addendum - Eligible</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decision and add the</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Scenario 4 - Ineligible (1st-Ineligible, 2nd-Ineligible after consult)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Decision 1</th>
<th>Decision 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step1</td>
<td>PCR Done - Found Ineligible, Second Opinion Requested</td>
<td>Ineligible</td>
<td>N/A</td>
<td>Second Opinion Requested</td>
</tr>
<tr>
<td>Step2</td>
<td>SOPR Done - Found Eligible, Need to consult 2nd Psychologist will enter SOPR decision as pending consultation</td>
<td>Ineligible</td>
<td>Pending Consultation</td>
<td>Pending Consultation (Auto-update)</td>
</tr>
<tr>
<td>Step3</td>
<td>2nd Psychologist concurs, will change decision on SOPR and submit SOPR</td>
<td>Ineligible</td>
<td>Concur</td>
<td>Pending Consultation (Auto-update)</td>
</tr>
<tr>
<td>Step4</td>
<td>1st Psychologist will update Pre-Eligibility Decision</td>
<td>Ineligible</td>
<td>Concur</td>
<td>Ineligible</td>
</tr>
</tbody>
</table>

### Scenario 5 - Eligible (1st-Ineligible, 2nd-Ineligible, Appeal Judge-Eligible)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Decision 1</th>
<th>Decision 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step1</td>
<td>PCR Done - Found Ineligible, Second Opinion Requested</td>
<td>Ineligible</td>
<td>N/A</td>
<td>Second Opinion Requested</td>
</tr>
<tr>
<td>Step2</td>
<td>SOPR Done - Found Ineligible 2nd Psychologist will enter SOPR decision</td>
<td>Ineligible</td>
<td>Concur</td>
<td>Second Opinion Requested</td>
</tr>
<tr>
<td>Step3</td>
<td>1st Psychologist will update Pre-Eligibility Decision</td>
<td>Ineligible</td>
<td>Concur</td>
<td>Ineligible</td>
</tr>
<tr>
<td>Step4</td>
<td>Individual appeals - Judge overturns decision</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Step5</td>
<td>Appeal Staff will update Pre-Eligibility Decision (or Appeal Staff?) No changes/addendums required in PCR or SOPR</td>
<td>Ineligible</td>
<td>Ineligible</td>
<td>Pre-Eligible</td>
</tr>
</tbody>
</table>

Table 1: Scenarios for Determination of Pre-Eligibility Recommendation

3.1 Complete Psychological Consultation (PC) Report

- Step 1: Login to the IDD Connects system 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 PC Report tile.
Step 6: Enter the details and click on the Submit button.

Note: To add an addendum to a submitted PC Report, click on Add Addendum button.

Once a PC report is submitted, the PC report cannot be edited. If the second Psychologist selects consultation complete in SOPR, then the second Psychologist is required to indicate the change in decision in PC report by adding an addendum.

If the PC report decision is eligible, then the system generates a task for the I&E manager to send the Pre-Eligibility letter.

Figure 17
Figure 18: PC Report

Figure 19: Upload Document section of the PC Report
Figure 20: Summary of findings for the PC Report

Figure 21: PC Report
### Conclusions and Recommendations

**Recommendation**
- [ ] Eligible
- [ ] Ineligible

#### Psychologist Signature

- **Psychologist Name**
  - Enter Psychologist Name
- **Psychologist Degree**
  - Msc
- **Psychologist License #**
  - CTEP012
- **DBHDD Region #**
  - 1

[Save] [Submit]

---

**Regional Office Address**
- Region 1
- 1230 Bald Ridge Marina Road, Suite 800
- 30041

**Regional Office Phone**
- 6784728918

---

**Figure 22: PC Report**

**Pre-Eligibility Recommendations**

- **Pre-eligibility Screening**
  - Completed
  - psych first 05/04/2018
- **Additional Evaluations/Assessments**
  - Not Required
- **PCR Online**
  - Completed
  - psych first 06/04/2018
- **Pre-Eligibility Recommendation**
  - In Progress
  - psych first 09/14/2018
- **SOPR Online**
  - Completed
  - psych first 09/14/2018

**Initial LOC PCR**
- Not Required

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**Figure 23**
3.2 Psychologist completes the Second Opinion Psychological Consultation Report

- Step 1: Login to the IDD Connects system 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 for the Individual.
- Step 4: Click on the Evaluation tab.
- Step 5: Click on the SOPR tile.
- Step 6: Enter the details and click on the Submit button.
Figure 26: Pre-Eligibility Recommendation status bar for SOPR tile

Figure 27: Pre-Eligibility Screening Section IV. Pre-Eligibility Recommendation

Note:

- For the SOPR, click on the SOPR Face to Face Evaluation and the system will direct the user to navigate to the Face to Face Evaluation document. Or, click on the SOPR report and the system will direct the user to the SOPR report.
- If the SOPR decision is Concur, the system triggers a task for I&E manager to send an adverse action letter.
- If PC Report decision is ineligible and the second Psychologist agrees with first psychologist, then Concur is selected. When the SOPR is submitted with concur decision, the Psychologist cannot edit the report.
- If PC Report decision is ineligible and the second Psychologist does not agree with first Psychologist, then Pending consultation is selected. The second Psychologist will consult with the first psychologist before completing the SOPR.
• After discussion with first Psychologist if, the individual is determined as eligible, then Consultation Complete is selected. Once SOPR is submitted with consultation complete, the Psychologist cannot edit the report.

Figure 28: SOPR

Figure 29: SOPR
3.3 Complete the Initial LOC Report

The initial LOC is completed when the Individual is determined pre-eligible and waiver funding is available.
• Step 1: Login to the IDD Connects system 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 the Initial LOC tile.
• Step 6: Enter the details and click on the Submit button.

Note: Clicking on the Carry-forward PC Report will copy the data from the PC report into the LOC PCR. Click on the Initial LOC Face-to-Face Evaluation for the system to navigate to the Face to Face Evaluation document. Click on the Initial LOC PCR form to open LOC PCR form in the system.

3.4 Psychologist enters the Pre-Eligibility Recommendation Decision

After the PC Report is completed and submitted, the Psychologist enters the pre-eligibility recommendation decision in the pre-eligibility screening form. If the decision in the PC report is ineligible, then the Psychologist selects Second Opinion Requested option. If the decision in PC
report is eligible, then the Psychologist selects the Pre-Eligible option, enters the diagnosis, and selects most likely eligible criteria.

If the decision in the SOPR is Pending Consultation, then the system populates the Pending Consultation in the pre-eligibility recommendation section. After the discussion with second Psychologist, if individual is determined eligible and SOPR is submitted with Consultation Complete as the decision then, the Psychologist adds an addendum in the PC Report and selects Pre-Eligible in the Pre-eligibility Recommendation section, enters a diagnosis, and selects most likely eligible determination.

Figure 34
Figure 35