BDDS Portal Provider Training 4:

Navigating the Portal

September 25, 2018

Navigating the Portal

https://cmportal.fssa.in.gov

Access to the BDDS Portal is controlled by your company's System Administrator. You will receive an invitation to access the BDDS Portal via email.

If you are a Provider System Administrator, and have not yet viewed the training on User Management, please view that training first.

Invitation to Access the BDDS Portal

Provider Agency: HELP AT HOME, INC.

Welcome! A new user account for the BDDS Portal has been created for you.

Action is required to complete your account set-up.

Click on this unique link to create a password and activate your account → BDDS Portal One-Time Account Activation   Click Here

After initial activation of your account, you may want to bookmark this URL for direct access to the system:

BDDS PORTAL Website → https://cmportal.fssa.in.gov

For reference, your login is: test@test.com

Your account activation link will expire in 30 days. If you have questions or your link has expired, please contact your system administrator. System administrators may submit JIRA tickets if further assistance is needed from the BDDS helpdesk.

DO NOT REPLY TO THIS EMAIL. This inbox is not monitored and your message may be automatically discarded.

BDDS Portal One-Time Activation

- The link in the email invitation is specific to ONE user account
- Clicking the link will direct you to a screen where you can:
  - Create a password
  - Accept the Terms & Conditions
  - Activate the Account
- Your login is not editable

BDDS Portal Activate User Account

Activate User Account

Welcome to the BDDS Portal!

Your login is available below. Please create a password and review/accept the Terms & Conditions.

Login | jane.doe@provider.com

Password | Password

Confirm Password | Confirm Password

To activate your account, you'll need to agree to these Terms & Conditions:

Terms and Conditions

User acknowledges it must fully comply with the HIPAA Privacy & Security Rules under 45 CFR Parts 160 and 164 when accessing this system. Users of this system agree to implement reasonable and appropriate administrative, technical and physical safeguards to protect the confidentiality, integrity and availability of all Protected Health Information and any and all other confidential information accessible on or through the

Create password

Accept Terms

☐ I accept the Terms and Conditions above.

Click "Activate Account" to complete your set-up. You'll be redirected to a login screen where you can enter your new credentials to access the BDDS Portal.
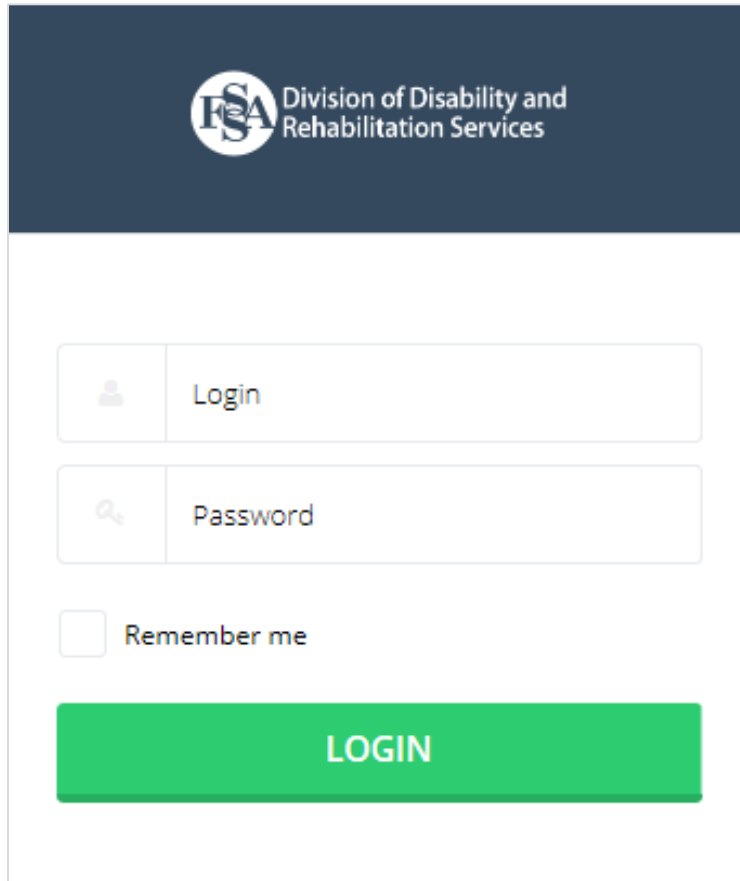
Activate Account

Activate Account

After clicking Activate Account, you'll be redirected to the BDDS Portal login screen.

Navigating the Portal

Once you have activated your account, you may login.

Bookmarking or saving this link to your desktop will make future BDDS Portal access easier:

https://cmportal.fssa.in.gov

System Navigation

- # System Navigation
  - ## Home / Dashboard
  - ## My Cases
  - ## Resources
  - ## Administration

  The system navigation bar is located at the top of every page. From here users can move between their home page Dashboard, My Cases, Resources, and Administration.
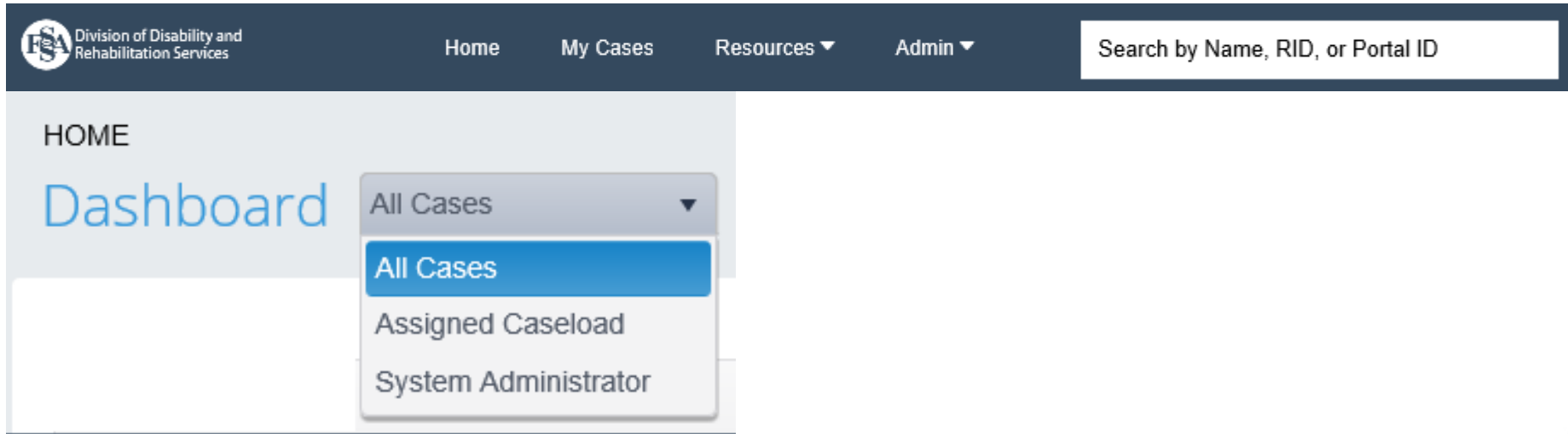
Search

The Search feature allows searching by:

- First Name;
- Last Name;
- First Name Last Name;
- Last Name, First Name;
- Portal ID, if known, or
- RID (Recipient ID – Medicaid Number)

Home / Dashboard

On Home / Dashboard, users will select their role based on the information desired. *Please note, the roles available are dependent upon the permissions assigned to the user by your company's System Administrator.*

Provider Dashboard

The Provider Dashboard contains multiple grids.

Provider Dashboard

HOME

Dashboard

Grids:

- **Recently Viewed Individuals** will contain up to 15 of the most recently viewed records.
- **PCISPs - Date of Last Finalized** will contain the dates of the last finalized PCISP.
- **Open IRs** will contain a list of individuals who have open IRs.
- **Recently Uploaded Documents** will contain profiles that have had documents uploaded in the last 10 days.

Provider Dashboard

Grids can be sorted and filtered. To sort, click on the header of the column you wish to sort by.

Provider Dashboard

To filter data within a grid, click on the blue filter icon above the column you wish to filter.

Provider Dashboard

You may select filters from the drop down menu or by typing text in the blank field. To clear a filter, click clear.

Provider Dashboard

Grids may be exported to Excel.

Provider Dashboard

Click on any individual listed in the grid(s) to access their Profile.

Reminder

- Grid Exports

  The grids on your Dashboard and Caseload can be exported to Excel.

My Cases

In addition to using links on the Dashboard or the search feature available on every page, individuals may be located on the My Cases page.

My Cases

Select the view.

Remember, roles available are determined by the permissions you have been given by your company's system administrator.

My Cases

If All Cases is selected, the user may further select employees to whom individuals are assigned by using the drop down menu.

The list of individuals assigned to that employee will then populate.

Resources: Reports
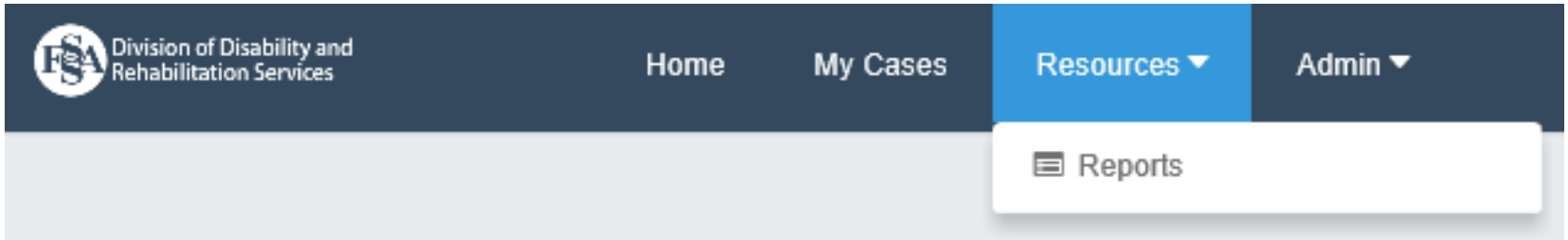
Under Resources, providers will have access to the Open IR Report.

Individual Specific Navigation: Profile

The blue, individual specific, navigation bar provides access to the individual's:

- PCISP

- Profile

- Documents

- Monitoring Checklists

- Transitions

Individual Specific Navigation: Profile

The left navigation menu will allow access to other pages within the Profile.

- Basic Information
- Living Arrangements
- Relationships
- Diagnosis
- Waiver
- Authorized Provider
- Manage

Profile: Basic Information

Personal Information

First Name	**Middle Name**	**Last Name**	**Portal ID**
CHARLIE	G	BROWN	41111
Preferred Name/Nickname	**RID**	**SSN**	**DOB**
	100000000199	***-**-3779	10/14/93

Addresses

+ Add Address

Address Type	Address	City, State Zip	County	District	Effective Date	End Date	Manual Validation
Individual Residence	402 W WASHINGTON ST	INDIANAPOLIS, IN, 46204-2243	Marion	5	09/03/18		No

View Address History

Contact Information

Home Phone	(317) 555-1212
Mobile Phone	
Email	test@test.com

On the basic information the user will see the individual's:
- Name, including preferred name or nickname
- Portal ID
- RID
- Social Security Number - last four digits only
- Date of Birth
- Address, and have the option to view address history; and the individual's
- Contact information including home and mobile phone numbers and email address;

Profile: Basic Information

Scrolling down the page:
- Contact information including home and mobile phone numbers and email address;
- Demographic information, including legal status, guardian or legal representative

Profile: Basic Information

Keep in mind -

Provider users **may:**
- View all available information
- Upload documents
- Delete documents they uploaded
- Access Resources / Reports

Provider users **may not**:
- Edit any information displayed
  If incorrect information is noted, please contact the Case Manager

Profile: Living Arrangements

Living Arrangements

Living Arrangements

Living Arrangement Type	Provider Owned or Controlled Setting?	Effective Date	Entry Date
Living with Two Housemates (sharing RHS staff)	Yes	09/17/15	09/17/15 12:22 AM

|◄ ◄ 1 ► ►| 10 ▼   items per page   1 - 1 of 1 items

Housemates

HIPAA Name
Linus***
Dusty****

On the Living Arrangements page the user will see the individual's:
- Current living arrangement including effective and entry dates
- Whether or not the individual lives in a provider owned or controlled setting
- Housemates

Profile: Relationships

Relationships

Relationships

Name	Relationship	Other	Contact Info	Contact Type
Sally Brown	Paid Guardian		(317) 555-1212 - sally@mail.com	Primary/Emergency/Guardian or Legal Rep/Team Member

Healthy Living Providers

Name	Relationship	Other	Contact Info	Contact Type	Appointment Frequency
Denny Dentist	Dentist		(132) 456-0789 -		
Dr Doolittle	Primary Care Physician		(987) 098-7098 -		
Provider Noble	Therapist		(317) 650-9000 - A.DeHaan@mynoblelife.org	Team Member	

Relationships displays:
- Existing relationships, including the guardian, family and other Individualized Support Team (IST) members
- Healthy Living Providers, including doctors, dentists and other medical specialists

Profile: Diagnosis

Diagnoses display as two types:
- Waiver Diagnosis contains only those diagnoses related to the individual's participation in HCBS waivers.
- Mental Health/Medical Diagnosis contains all other diagnosis information.

Historical diagnosis can be viewed by clicking 'View Diagnosis History'.

Profile: Waiver

Waiver Information

Waiver Type	CIH	**ALGO Level**	4
Waiver Status	Active	**Allocation**	$99,880.00
Waiver Start Date	02/19/02	**Raw Health Score**	7

Health Care Supports

Frequency	4
Intensity	3
Effective Date	02/01/18

[View Waiver History]   [View Medicaid Info]

The Waiver page includes:
- Waiver type, status, start date, and waiver history
- Algo, allocation, heath score and heath care supports for CIH waiver participants; and
- A link to view Medicaid information from CoreMMIS.

Profile: Waiver

Audit

Medicaid Redetermination Date: 09/30/18			**Next Team Meeting Date:** 11/28/18	
PCISP	**LOCSI**	**Service Plan**	**Monitoring Checklist**	**Unannounced Visit**
Next Annual Due	Annual Due	Annual Due	Due	Annual Due
12/01/19	08/13/19	12/01/19	11/30/18	08/24/19
Last Finalized	Last Finalized	Last Approved	Last Finalized	Last Activity
06/29/18	08/13/18	09/10/18	08/24/18	08/24/18
		Annual		

The audit section of the page displays:

- The Medicaid redetermination date;
- The due and last dates for the PCISP, LOCSI, Service Plan, Monitoring Checklist and Unannounced Visits for individuals living in a provider owned or controlled setting.

Profile: Waiver

Service Plan History

Service Plan Type	Waiver	Effective Date	End Date	Service Plan Status	Transmit Date
Annual	CIH	06/01/18	05/31/19	Approved	04/20/18
Update	CIH	06/01/17	05/31/18	Approved	04/02/18
Update	CIH	06/01/17	05/31/18	Approved	09/23/17
Annual	CIH	06/01/17	05/31/18	Approved	04/15/17
Update	CIH	06/01/16	05/31/17	Approved	

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Waiver Services from Current & Approved Service Plan

Provider Agency	Agency Location	Service	Effective Date	End Date	Rate	Units
EASTER SEALS CROSSROADS	Indianapolis	Adult Day Service - Level 3	06/01/18	05/31/19	$36.00	72
FUTURES CASE MANAGEMENT, LLC	La Porte	Case Management	06/01/18	05/31/19	$131.25	12
INDIANA BEHAVIORAL SUPPORT SERVICES	Indianapolis	Behavior Management - Basic	06/01/18	05/31/19	$18.20	564
MIDWEST PSYCHOLOGICAL CENTER, INC.	Indianapolis	Behavior Management - Level 1	06/01/18	05/31/19	$18.20	12
NOBLE OF INDIANA	Indianapolis	Music Therapy	06/01/18	05/31/19	$10.78	156

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Scrolling down:
- Service Plan History
- Waiver Services from Current & Approved Service Plan

Profile: Authorized Providers

Authorized Provider

Case Manager - Current as of 02/21/18

Name	Charles Schultz
Case Manager Phone	(317) 555-1212
Case Manager Phone 2	(317) 828-3746
Case Manager Email	charles.schultz@cmco.com

[View Case Manager History]

Current CMCO

CMCO	CMCO

CM Supervisor

Supervisor	Franklin Armstrong
Supervisor Phone	219-555-1212
Supervisor Email	franklin.armstrong@cmco.com

Authorized Providers includes:
- Case Manager contact information
- Case Manager's Supervisor name and contact information
- Case Manager History

> *Note: Case Manager History is only displayed from BDDS Portal implementation forward.*

Profile: Authorized Providers

Current Providers on Service Plan

Provider Agency	Agency Location	Phone	Service	Effective Date	End Date
EASTER SEALS CROSSROADS	Indianapolis		Adult Day Service - Level 3	06/01/18	05/31/19
FUTURES CASE MANAGEMENT, LLC	La Porte		Case Management	06/01/18	05/31/19
INDIANA BEHAVIORAL SUPPORT SERVICES	Indianapolis		Behavior Management - Basic	06/01/18	05/31/19
MIDWEST PSYCHOLOGICAL CENTER, INC.	Indianapolis		Behavior Management - Level 1	06/01/18	05/31/19
NOBLE OF INDIANA	Indianapolis		Music Therapy	06/01/18	05/31/19
OUTSIDE THE BOX , INC.	Indianapolis		Facility Hab-group (4:1)	06/01/18	05/31/19
TOGETHER WE CAN, INC	Indianapolis		Community Habilitation-indiv	06/01/18	05/31/19
TOGETHER WE CAN, INC	Indianapolis		Res Habilitation - Daily Rate	06/01/18	05/31/19
TOGETHER WE CAN, INC	Indianapolis		Transportation-(1 Way)	06/01/18	05/31/19

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[Assign to Caseload] [Unassign from Caseload]

My Provider Agency Caseload Assignments

Name
Jane Doe

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Scrolling down:

- Current Providers on Service Plan
- My Provider Agency Caseload Assignments displays the representatives to whom the individual is assigned.

  Note: A System Administrator can assign or un-assign the individual to agency user caseloads from this menu.

Individual Specific Navigation: Documents

From the documents page, the user may view or upload documents for a specific individual. As with other pages within the BDDS portal, all columns on the page may be sorted, filtered, or searched.

For additional information, please review the BDDS Portal Provider Training on the Document Library at https://www.in.gov/fssa/ddrs/5437.htm

Monitoring Checklist

CHARLIE G BROWN - Checklist Listing

BROWCHAG100000000199
Portal ID: 41111

Next Checklist Type: Year End

Case Mgr: Charles Schultz
CMCO: CMCO
Waiver: CIH-Active /
Next Checklist Due Date: 05/31/18

PCISP | Profile | Documents | **Monitoring Checklist** | Transitions

Checklist	Status	Date Submitted	CAP Status
Quarterly	Finalized	3/12/18	Not Required
Mid-Year	Finalized	12/13/17	Not Required
Quarterly	Finalized	9/19/17	Not Required
Year End	Finalized	6/14/17	Not Required
Quarterly	Finalized	3/28/17	Not Required
Mid-Year	Finalized	12/15/16	Not Required
Quarterly	Finalized	9/20/16	Not Required
Imported	Finalized	6/22/16	Not Required

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Checklist Schedules

The link to the Monitoring Checklist on the individual specific navigation bar directs the to the individual's checklist listing page. From here the user can see the list of completed checklists and well as the next checklist due date and type.

For additional information, please review the BDDS Provider Portal Training on the Monitoring Checklist at https://www.in.gov/fssa/ddrs/5437.htm

Individual Specific Navigation: Transitions

On the Transitions page, the user may view the transition details by clicking on the individual transition.

Please review the BDDS Provider Portal Training on Transitions at
https://www.in.gov/fssa/ddrs/5437.htm

BDDS Portal Trainings
https://www.in.gov/fssa/ddrs/5437.htm

- BDDS Portal Provider Training 1: Accessing the BDDS Portal
- BDDS Portal Provider Training 2: User Management (for System Administrators)
- BDDS Portal Provider Training 3: My Cases / Caseload Assignment
- BDDS Portal Provider Training 4: Navigating the Portal
- BDDS Portal Provider Training 5: Individual Profile
- BDDS Portal Provider Training 6: Document Library
- BDDS Portal Provider Training 7: PCISP
- BDDS Portal Provider Training 8: Viewing the Monitoring Checklist
- BDDS Portal Provider Training 9: Viewing Transitions