

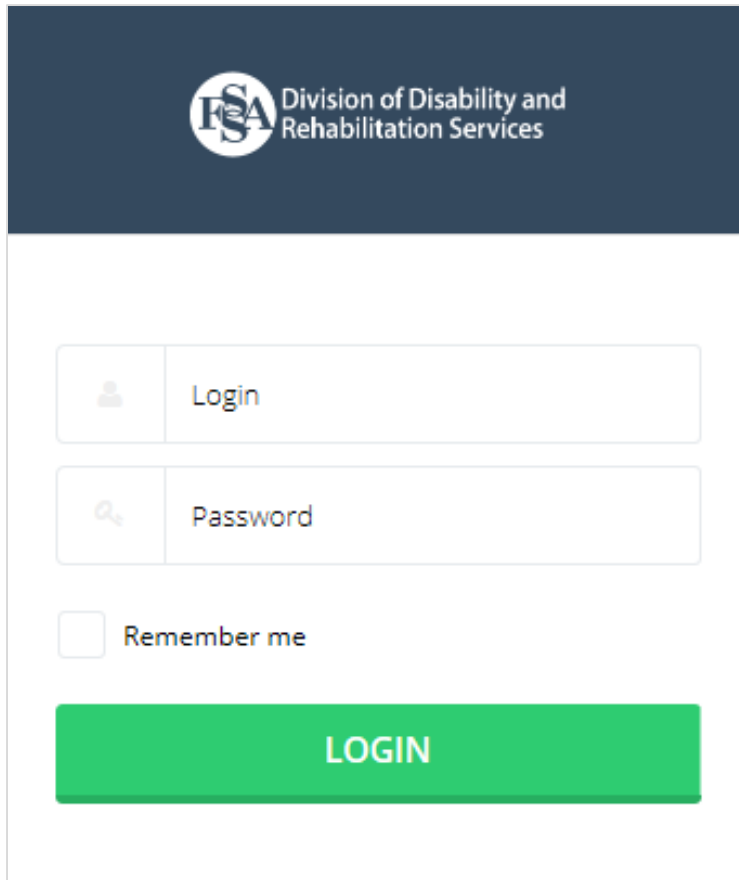
*BDDS Portal Provider Training 4:*

# *Navigating the Portal*

September 25, 2018



# Navigating the Portal



The screenshot shows the login interface for the BDDS Portal. At the top left, there is a dark blue header with the FSA logo and the text "Division of Disability and Rehabilitation Services". Below this, there are two input fields: "Login" and "Password". The "Login" field has a person icon on the left, and the "Password" field has a magnifying glass icon on the left. Below these fields is a checkbox labeled "Remember me". At the bottom of the form is a large green button with the text "LOGIN" in white capital letters.

<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

From: [BDDSPortalAccess@fssa.in.gov](mailto:BDDSPortalAccess@fssa.in.gov) [mailto:[BDDSPortalAccess@fssa.in.gov](mailto:BDDSPortalAccess@fssa.in.gov)]

Sent: Wednesday, August 29, 2018 3:36 PM

To: Jane Doe

Subject: Your Invitation to 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

Password

Confirm Password

← Create 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

→ 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.

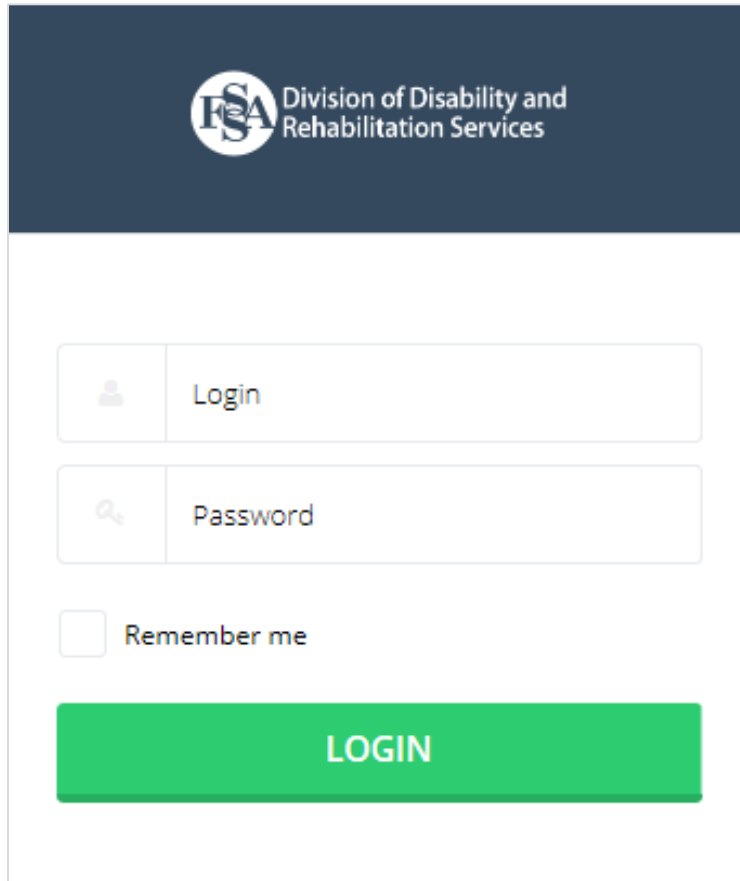
Activate Account

← Activate Account

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



# Navigating the Portal



The screenshot shows the login interface for the BDDS Portal. At the top, there is a dark blue header with the FSA logo and the text "Division of Disability and Rehabilitation Services". Below the header, there are two input fields: "Login" and "Password". The "Login" field has a person icon on the left, and the "Password" field has a magnifying glass icon on the left. Below these fields is a checkbox labeled "Remember me". At the bottom of the form is a large green button with the text "LOGIN" in white capital letters.

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



[Home](#)

[My Cases](#)

[Resources](#) ▾

[Admin](#) ▾

Search by Name, RID, or Portal ID

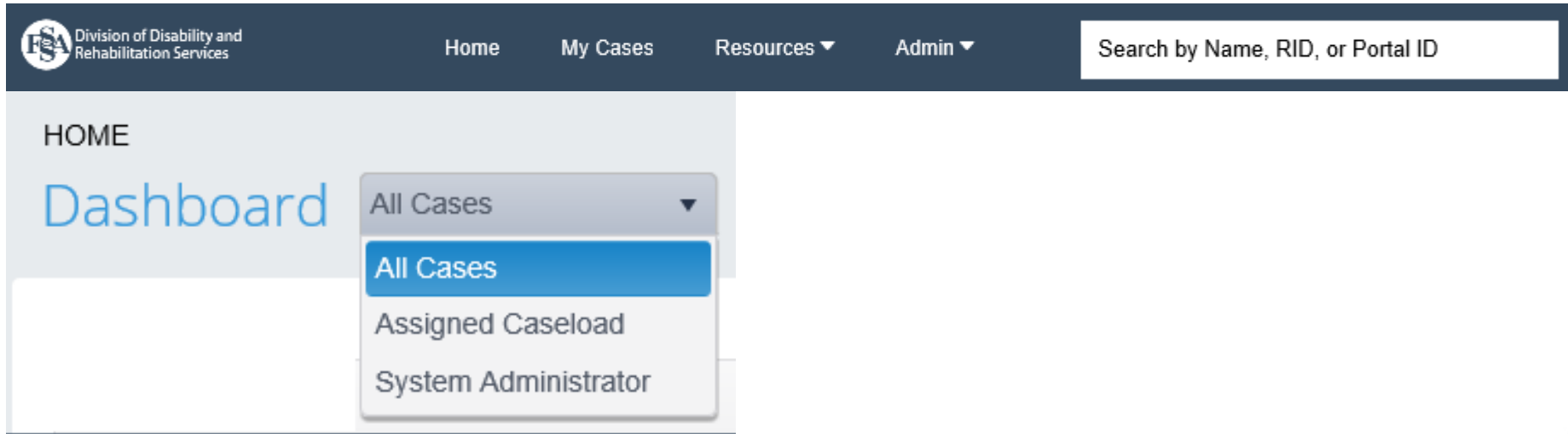
The Search feature allows searching by:

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





# Home / Dashboard



The screenshot displays the top navigation bar of the system. On the left, there is a logo for the 'Division of Disability and Rehabilitation Services' (FSA). The navigation menu includes 'Home', 'My Cases', 'Resources', and 'Admin'. A search bar on the right is labeled 'Search by Name, RID, or Portal ID'. Below the navigation bar, the main content area is titled 'HOME Dashboard'. A dropdown menu is open, showing three options: 'All Cases' (highlighted in blue), 'Assigned Caseload', and 'System Administrator'. A red arrow points upwards from the text below to the 'All Cases' option in the dropdown menu.

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

HOME

Dashboard All Cases

*Recently Viewed Individuals*

Export to Excel

Client Name	SSN	DOB	County	Waiver	Assigned to	Case Manager	Case Manager Phone	Case Manager Email
BROWN, CHARLIE G	3779	10/14/93	Marion	CIH	Jane Doe, Bob Smith	Montica White	(317) 626-3746	montica@futurecaseman...
BEAGLE, SNOOPY J	3532	05/14/63	Marion	CIH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
DUSTY, PIGPEN	9503	11/27/61	Marion	CIH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
GOODFRIEND, MARCIE L	2425	11/28/67	Marion	CIH	Unassigned	Elizabeth Betsy Stank...	(513) 667-5003	estankovich@carestar.com

*PCISPs - Date of Last Finalized*

Export to Excel

Client Name	SSN	County	PCISP Date
BROWN, CHARLIE G.	3779	Marion	09/04/18
VANPELT, LUCY T.	4955	Marion	09/03/18

*Open IRs*

Export to Excel

Client Name	IR Type	IR #	Incident Date	BDDS Received Date	Date of Last Follow-Up
-------------	---------	------	---------------	--------------------	------------------------

10 Items per page No items to display

*Recently Uploaded Documents (< 10 days)*

Export to Excel

Client Name	SSN	County	# of Documents
BROWN, CHARLIE G.	3779	Marion	1

10 Items per page 1 - 1 of 1 items

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

HOME  
Dashboard All Cases

*Recently Viewed Individuals*

Export to Excel

Client Name	SSN	DOB	County	Waiver	Assigned to	Case Manager	Case Manager Phone	Case Manager Email
BROWN, CHARLIE G	3779	10/14/93	Marion	CIH	Jane Doe, Bob Smith	Monica White	(317) 626-3746	monica@futurecaseman...
BEAGLE, SNOOPY J	3532	05/14/63	Marion	CIH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
DUSTY, PIGPEN	9503	11/27/61	Marion	CIH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
GOODFRIEND, MARCIE L	2425	11/28/67	Marion	CIH	Unassigned	Elizabeth Betsy Stank...	(513) 667-5003	estankovich@carestar.com

*PCISPs - Date of Last Finalized*

Export to Excel

Client Name	SSN	County	PCISP Date
BROWN, CHARLIE G.	3779	Marion	09/04/18
VANPELT, LUCY T.	4955	Marion	09/03/18

*Open IRs*

Export to Excel

Client Name	IR Type	IR #	Incident Date	BDDS Received Date	Date of Last Follow-Up
-------------	---------	------	---------------	--------------------	------------------------

10 Items per page No items to display

*Recently Uploaded Documents (< 10 days)*

Export to Excel

Client Name	SSN	County	# of Documents
BROWN, CHARLIE G.	3779	Marion	1

10 Items per page 1 - 1 of 1 items

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



# Provider Dashboard

HOME  
Dashboard All Cases

Recently Viewed Individuals

Export to Excel

Client Name	SSN	DOB	County	Waiver	Assigned to	Case Manager	Case Manager Phone	Case Manager Email
BROWN, CHARLIE G	3779	10/14/93	Marion	CIH	Jane Doe, Bob Smith	Monica White	(317) 626-3746	monica@futurecaseman...
BEAGLE, SNOOPY J	3532	05/14/63	Marion	CIH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
DUSTY, PIGPEN	9503	11/27/61	Marion	CIH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
GOODFRIEND, MARCIE L	2425	11/28/67	Marion	CIH	Unassigned	Elizabeth Betsy Stank...	(513) 667-5003	estankovich@carestar.com

PCISPs - Date of Last Finalized

Export to Excel

Client Name	SSN	County	PCISP Date
BROWN, CHARLIE G.	3779	Marion	09/04/18
VANPELT, LUCY T.	4955	Marion	09/03/18

Open IRs

Export to Excel

Client Name	IR Type	IR #	Incident Date	BDDS Received Date	Date of Last Follow-Up
-------------	---------	------	---------------	--------------------	------------------------

10 Items per page No items to display

Recently Uploaded Documents (< 10 days)

Export to Excel

Client Name	SSN	County	# of Documents
BROWN, CHARLIE G.	3779	Marion	1

10 Items per page 1 - 1 of 1 items

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



# Provider Dashboard

HOME  
Dashboard All Cases

*Recently Viewed Individuals*

Export to Excel

Client Name	SSN	DOB	County	Case Manager	Case Manager Phone	Case Manager Email
BROWN, CHARLIE G	3779	10/14/93	Marion	Monica White	(317) 626-3746	monica@futurecaseman...
BEAGLE, SNOOPY J	3532	05/14/83	Marion	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
DUSTY, PIGPEN	9503	11/27/61	Marion	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
GOODFRIEND, MARCIE L	2425	11/28/67	Marion	Elizabeth Betsy Stank...	(513) 667-5003	estankovich@carestar.com

*PCISPs - Date of Last Finalized*

Export to Excel

Client Name	SSN	County	PCISP Date
BROWN, CHARLIE G.	3779	Marion	09/04/18
VANPELT, LUCY T.	4955	Marion	09/03/18

*Open IRs*

Export to Excel

Client Name	IR Type	IR #	Incident Date	BDDS Received Date	Date of Last Follow-Up
-------------	---------	------	---------------	--------------------	------------------------

10 Items per page No items to display

*Recently Uploaded Documents (< 10 days)*

Export to Excel

Client Name	SSN	County	# of Documents
BROWN, CHARLIE G.	3779	Marion	1

10 Items per page 1 - 1 of 1 items

Show items with value that:

Contains

Filter Clear

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

HOME  
Dashboard All Cases

*Recently Viewed Individuals*

[Export to Excel](#)

Client Name	SSN	DOB	County	Waiver	Assigned to	Case Manager	Case Manager Phone	Case Manager Email
BROWN, CHARLIE G	3779	10/14/93	Marion	CBH	Jane Doe, Bob Smith	Montica White	(317) 626-3746	montica@futurescaseman...
BEAGLE, SNOOPY J	3532	05/14/63	Marion	CBH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
DUSTY, PIGPEN	9503	11/27/61	Marion	CBH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
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Client Name	SSN	County	PCISP Date
BROWN, CHARLIE G.	3779	Marion	09/04/18
VANPELT, LUCY T.	4955	Marion	09/03/18

*Open IRs*

[Export to Excel](#)

Client Name	IR Type	IR #	Incident Date	BODS Received Date	Date of Last Follow-Up
No items to display					

*Recently Uploaded Documents (< 10 days)*

[Export to Excel](#)

Client Name	SSN	County	# of Documents
BROWN, CHARLIE G.	3779	Marion	1

Grids may be exported to Excel.



# Provider Dashboard

HOME  
Dashboard All Cases

*Recently Viewed Individuals*

[Export to Excel](#)

Client Name	SSN	DOB	County	Waiver	Assigned to	Case Manager	Case Manager Phone	Case Manager Email
BROWN, CHARLIE G	3779	10/14/93	Marion	CBH	Jane Doe, Bob Smith	Montica White	(317) 626-3746	montica@futurescaseman...
BEAGLE, SNOOPY J	3532	05/14/63	Marion	CBH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
DUSTY, PIGPEN	9503	11/27/61	Marion	CBH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@carestar.com
GOODFRIEND, MARCIE L	2425	11/28/67	Marion	CBH	Unassigned	Elizabeth Betsy Stank...	(513) 667-5003	estankovich@carestar.com

*PCISPs - Date of Last Finalized*

[Export to Excel](#)

Client Name	SSN	County	PCISP Date
BROWN, CHARLIE G.	3779	Marion	09/04/18
VANPELT, LUCY T.	4955	Marion	09/03/18

*Open IRs*

[Export to Excel](#)

Client Name	IR Type	IR #	Incident Date	BDDS Received Date	Date of Last Follow-Up
No items to display					

*Recently Uploaded Documents (< 10 days)*

[Export to Excel](#)

Client Name	SSN	County	# of Documents
BROWN, CHARLIE G.	3779	Marion	1

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

HOME

## Caseload

To assign or unassign clients to a user's caseload, select client(s) using the check boxes in the grid below.

View : All Cases My Cases Exp

Assigned to: [ ]

Assign Case(s) Unassign Case(s)

Select the view.

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



# My Cases

HOME  
Caseload

To assign or unassign clients to a user's caseload, select client(s) using the check boxes in the grid below.

View : All Cases  
My Cases  
All Cases

Assigned to: [Empty dropdown]

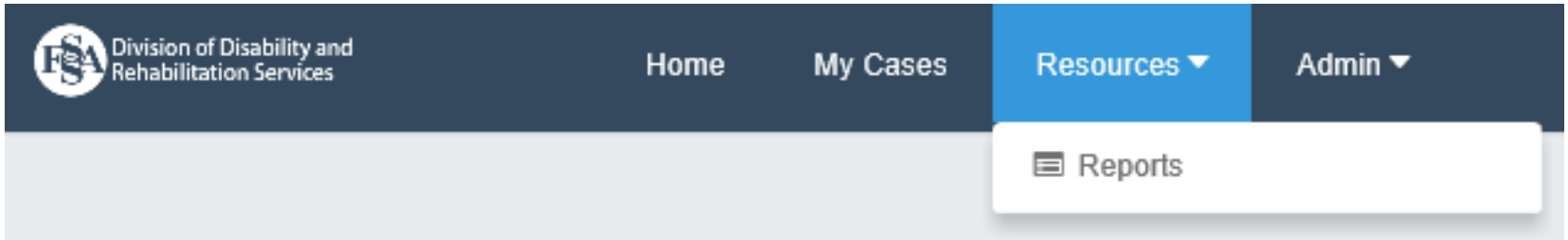
Assign Case(s) Unassign Case(s)

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



## [Open IR Report](#)

This report outputs a list of open IR's. The list is exportable to Excel

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



# Individual Specific Navigation: Profile

HOME  
CHARLIE G BROWN - Profile

BROWCHAG10000000199  
Portal ID: 41111

Case Mgr: Charles Schultz  
CMCO: ITest CMCO  
Waiver: CIH-Active /

[PCISP](#) [Profile](#) [Documents](#) [Monitoring Checklist](#) [Transitions](#)

## Basic Information

**Personal Information**

<b>First Name</b> CHARLIE	<b>Middle Name</b> G	<b>Last Name</b> BROWN	<b>Portal ID</b> 41111
<b>Preferred Name/Nickname</b> [Redacted]	<b>RID</b> 100000000199	<b>SSN</b> ***-**-3779	<b>DOB</b> 10/14/93

**Addresses**

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](#)

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

- PCISP
- Profile
- Documents
- Monitoring Checklists
- Transitions



# Individual Specific Navigation: Profile

HOME

CHARLIE G BROWN - Profile

BROWCHAG100000000199

Portal ID: 41111

Case Mgr: Charles Schultz

CMCO: ITest CMCO

Waiver: CIH-Active /

PCISP

Profile

Documents

Monitoring Checklist

Transitions

## Basic Information

Basic Information

Living Arrangements

Relationships

Diagnosis

Waiver

Authorized Provider

Manage

### Personal Information

First Name

CHARLIE

Middle Name

G

Last Name

BROWN

Portal ID

41111

Preferred Name/Nickname

RID

100000000199

SSN

\*\*\*-\*\*-3779

DOB

10/14/93

### Addresses

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

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  
CHARLIE

Middle Name

G

Last Name  
BROWN

Portal ID  
41111

Preferred Name/Nickname

RID

100000000199

SSN

\*\*\*-\*\*-3779



DOB

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

## Contact Information

Home Phone

Mobile Phone

Email

## Demographic Information

Gender

Races

Legal Status

Marital Status

Ethnicity

Legal Status Notes

## Guardian or Legal Representative

Full Name	Phone	Email	Relationship	Upload Doc	Link Doc
Sally Brown	(317) 555-1212	sally@mail.com	Paid Guardian	<input type="button" value="Upload"/>	<input type="button" value="Link"/>

## Language

Language

If a translator has been identified, please provide contact information:

## Translator(s)

Full Name	Phone	Email
Patricia Reichardt	(812) 555-1212	peppermint.patty@mail.com

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

## Diagnosis

### Waiver Diagnosis

Diagnosis	ICD-10	Diagnosis Date	Diagnosis Type
Autistic disorder	F840	10/12/15	Primary Diagnosis

### Mental Health or Medical Diagnosis

Diagnosis	ICD-10	Diagnosis Date
Tuberous sclerosis	Q851	10/12/15

[View Diagnosis History](#)

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

<b>Waiver Type</b>	CIH
<b>Waiver Status</b>	Active
<b>Waiver Start Date</b>	02/19/02

[View Waiver History](#)

[View Medicaid Info](#)

<b>ALGO Level</b>	4
<b>Allocation</b>	\$99,880.00
<b>Raw Health Score</b>	7
<b>Health Care Supports</b>	
<b>Frequency</b>	4
<b>Intensity</b>	3
<b>Effective Date</b>	02/01/18

The Waiver page includes:

- Waiver type, status, start date, and waiver history
- Algo, allocation, health score and health 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
<b>Next Annual Due</b> 12/01/19	<b>Annual Due</b> 08/13/19	<b>Annual Due</b> 12/01/19	<b>Due</b> 11/30/18	<b>Annual Due</b> 08/24/19
<b>Last Finalized</b> 06/29/18	<b>Last Finalized</b> 08/13/18	<b>Last Approved</b> 09/10/18 Annual	<b>Last Finalized</b> 08/24/18	<b>Last Activity</b> 08/24/18

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	

◀ ◀ 1 2 3 4 5 6 7 8 9 10 ... ▶ ▶
 items per page
 1 - 5 of 64 items

## 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

◀ ◀ 1 2 ▶ ▶
 items per page
 1 - 5 of 9 items

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](mailto: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](mailto: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

10 items per page 1 - 9 of 9 items

## My Provider Agency Caseload Assignments

Assign to Caseload

Unassign from Caseload

Name
Jane Doe

50 items per page 1 - 1 of 1 items

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

HOME  
CHARLIE G BROWN - Documents

BROWCHAG10000000199  
Portal ID: 41111

Case Mgr: Charles Schultz  
CMCO: CMCO  
Waiver: CIH-Active /

PCISP Profile **Documents** Monitoring Checklist Transitions

Search + Upload Document

Category	Sub-Type	Month/Year	Upload Date	Uploaded By...	Comments	Document Name	File Size In...		
PCISP	Finalized	Sep 2018	09/04/18	BDDS: James Kr...		BROWN_CHARLIE_PCISP_09-04-2018.pdf	1.96		
Legal	Guardianship	Sep 2018	09/03/18	BDDS: James Kr...		Guardian Papers.docx	0.01		

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

HOME > WAIVER PARTICIPANT LISTING

CHARLIE G BROWN - Checklist Listing

BROWCHAG10000000199

Portal ID: 41111

Case Mgr: Charles Schultz

CMCO: CMCO

Waiver: CIH-Active /

Next Checklist Due Date: 05/31/18

Next Checklist Type: Year End

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



10 items per page

1 - 8 of 8 items

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

HOME

CHARLIE G BROWN - Transitions

BROWCHAG100000000199

Portal ID: 41111

Case Mgr: Charles Schultz

CMCO:CMCO

Waiver: CIH-Active /

PCISP

Profile

Documents

Monitoring Checklist

Transitions

+ Create New Transition

## Transitions - Active

Transition Type	Intended Transition...	Actual Transition Date	Status	Status Date	# of Open CAPs	Moving From District	Moving To District
Change RHS; No Chang...	09/03/18		Initiated	09/03/18	0	5	5

5 items per page 1 - 1 of 1 items

## Transitions - Historical

Transition Type	Actual Transition Date	Status	Status Date	Moving From District	Moving To District
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5 items per page No items to display

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

