BDDS Portal Provider Training 4:
Navigating the Portal

September 25, 2018
Navigating the Portal

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
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](https://cmportal.fssa.in.gov)

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](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
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

- 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.
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)
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.*
The Provider Dashboard contains multiple grids.
Provider 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.
To filter data within a grid, click on the blue filter icon above the column you wish to filter.
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

**Recently Viewed Individuals**

<table>
<thead>
<tr>
<th>Client Name</th>
<th>SSN</th>
<th>DOB</th>
<th>County</th>
<th>Waiver</th>
<th>Assigned to</th>
<th>Case Manager</th>
<th>Case Manager Phone</th>
<th>Case Manager Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>BROWN, CHARLIE G.</td>
<td>3779</td>
<td>10/14/93</td>
<td>Marion</td>
<td></td>
<td>Jane Doe, Bob Smith</td>
<td>Montica White</td>
<td>(317) 828-3746</td>
<td>montica@futurescaseman....</td>
</tr>
<tr>
<td>BEAGLE, SNOOPY J.</td>
<td>3532</td>
<td>06/14/63</td>
<td>Marion</td>
<td></td>
<td>Lisa Jones</td>
<td>Bobby Lamar Young</td>
<td>(513) 801-7706</td>
<td><a href="mailto:byoung@carestar.com">byoung@carestar.com</a></td>
</tr>
<tr>
<td>DUSTY, PIGPEN</td>
<td>9503</td>
<td>11/27/61</td>
<td>Marion</td>
<td></td>
<td>Lisa Jones</td>
<td>Bobby Lamar Young</td>
<td>(513) 801-7706</td>
<td><a href="mailto:byoung@carestar.com">byoung@carestar.com</a></td>
</tr>
<tr>
<td>GOODFRIEND, MARCIE L</td>
<td>2425</td>
<td>11/28/67</td>
<td>Marion</td>
<td></td>
<td>Unassigned</td>
<td>Elizabeth Betsy Stark...</td>
<td>(513) 667-5003</td>
<td><a href="mailto:estankovich@carestar.com">estankovich@carestar.com</a></td>
</tr>
</tbody>
</table>

**PCISPs – Date of Last Finalized**

<table>
<thead>
<tr>
<th>Client Name</th>
<th>SSN</th>
<th>County</th>
<th>PCISP Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>BROWN, CHARLIE G.</td>
<td>3779</td>
<td>Marion</td>
<td>09/04/18</td>
</tr>
<tr>
<td>VANPELT, LUCY T.</td>
<td>4955</td>
<td>Marion</td>
<td>09/03/18</td>
</tr>
</tbody>
</table>

**Open iRS**

- **Export to Excel**

**Recently Uploaded Documents (< 10 days)**

- **Export to Excel**

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

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.
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

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

Demographic Information
- Gender: Male
- Races: White
- Legal Status: Protected Person
- Marital Status: Single
- Ethnicity: Not Hispanic or Latino
- Legal Status Notes: 

Guardian or Legal Representative
- Full Name: Sally Brown
- Phone: (317) 555-1212
- Email: sally@mail.com
- Relationship: Paid Guardian
- Upload Doc: 
- Link Doc: 

Language
- Non-Verbal

Translator(s)
- Full Name: Patricia Reichardt
- Phone: (812) 555-1212
- Email: 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

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 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

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

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.

<table>
<thead>
<tr>
<th>PCISP</th>
<th>LOCSI</th>
<th>Service Plan</th>
<th>Monitoring Checklist</th>
<th>Unannounced Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next Annual Due: 12/01/19</td>
<td>Annual Due: 08/13/19</td>
<td>Annual Due: 12/01/19</td>
<td>Due: 11/30/18</td>
<td>Annual Due: 08/24/19</td>
</tr>
<tr>
<td>Last Finalized: 06/29/18</td>
<td>Last Finalized: 08/13/18</td>
<td>Last Approved: 09/10/18</td>
<td>Last Finalized: 08/24/18</td>
<td>Last Activity: 08/24/18</td>
</tr>
</tbody>
</table>
# Profile: Waiver

## Service Plan History

<table>
<thead>
<tr>
<th>Service Plan Type</th>
<th>Waiver</th>
<th>Effective Date</th>
<th>End Date</th>
<th>Service Plan Status</th>
<th>Transmit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual</td>
<td>CIH</td>
<td>06/01/18</td>
<td>05/31/19</td>
<td>Approved</td>
<td>04/20/18</td>
</tr>
<tr>
<td>Update</td>
<td>CIH</td>
<td>06/01/17</td>
<td>05/31/18</td>
<td>Approved</td>
<td>04/02/18</td>
</tr>
<tr>
<td>Update</td>
<td>CIH</td>
<td>06/01/17</td>
<td>05/31/18</td>
<td>Approved</td>
<td>09/23/17</td>
</tr>
<tr>
<td>Annual</td>
<td>CIH</td>
<td>06/01/17</td>
<td>05/31/18</td>
<td>Approved</td>
<td>04/15/17</td>
</tr>
<tr>
<td>Update</td>
<td>CIH</td>
<td>06/01/16</td>
<td>05/31/17</td>
<td>Approved</td>
<td></td>
</tr>
</tbody>
</table>

## Waiver Services from Current & Approved Service Plan

<table>
<thead>
<tr>
<th>Provider Agency</th>
<th>Agency Location</th>
<th>Service</th>
<th>Effective Date</th>
<th>End Date</th>
<th>Rate</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>EASTERN SEALS CROSSROADS</td>
<td>Indianapolis</td>
<td>Adult Day Service - Level 3</td>
<td>06/01/18</td>
<td>05/31/19</td>
<td>$35.00</td>
<td>72</td>
</tr>
<tr>
<td>FUTURES CASE MANAGEMENT, LLC</td>
<td>La Porte</td>
<td>Case Management</td>
<td>06/01/18</td>
<td>05/31/19</td>
<td>$131.25</td>
<td>12</td>
</tr>
<tr>
<td>INDIANA BEHAVIORAL SUPPORT SERVICES</td>
<td>Indianapolis</td>
<td>Behavior Management - Basic</td>
<td>06/01/18</td>
<td>05/31/19</td>
<td>$18.20</td>
<td>564</td>
</tr>
<tr>
<td>MIDWEST PSYCHOLOGICAL CENTER, INC.</td>
<td>Indianapolis</td>
<td>Behavior Management - Level 1</td>
<td>06/01/18</td>
<td>05/31/19</td>
<td>$18.20</td>
<td>12</td>
</tr>
<tr>
<td>NOBLE OF INDIANA</td>
<td>Indianapolis</td>
<td>Music Therapy</td>
<td>06/01/18</td>
<td>05/31/19</td>
<td>$10.78</td>
<td>156</td>
</tr>
</tbody>
</table>

### Scrolling down:
- Service Plan History
- Waiver Services from Current & Approved Service Plan
Profile: Authorized Providers

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.*

<table>
<thead>
<tr>
<th>Case Manager - Current as of 02/21/18</th>
<th>Current CMCO</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td><strong>CMCO</strong></td>
</tr>
<tr>
<td>Charles Schultz</td>
<td></td>
</tr>
<tr>
<td><strong>Case Manager Phone</strong></td>
<td><strong>CM Supervisor</strong></td>
</tr>
<tr>
<td>(317) 555-1212</td>
<td>Supervisor</td>
</tr>
<tr>
<td><strong>Case Manager Phone 2</strong></td>
<td>Supervisor Phone</td>
</tr>
<tr>
<td>(317) 828-3746</td>
<td>210-555-1212</td>
</tr>
<tr>
<td><strong>Case Manager Email</strong></td>
<td><strong>CMCO</strong></td>
</tr>
<tr>
<td><a href="mailto:charles.schultz@cmco.com">charles.schultz@cmco.com</a></td>
<td>Franklin Armstrong</td>
</tr>
</tbody>
</table>

View Case Manager History
Profile: Authorized Providers

Current Providers on Service Plan

<table>
<thead>
<tr>
<th>Provider Agency</th>
<th>Agency Location</th>
<th>Phone</th>
<th>Service</th>
<th>Effective Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>EASTER SEALS CROSSROADS</td>
<td>Indianapolis</td>
<td></td>
<td>Adult Day Service - Level 3</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>FUTURES CASE MANAGEMENT, LLC</td>
<td>La Porte</td>
<td></td>
<td>Case Management</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>INDIANA BEHAVIORAL SUPPORT SERVICES</td>
<td>Indianapolis</td>
<td></td>
<td>Behavior Management - Basic</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>MIDWEST PSYCHOLOGICAL CENTER, INC.</td>
<td>Indianapolis</td>
<td></td>
<td>Behavior Management - Level 1</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>NOBLE OF INDIANA</td>
<td>Indianapolis</td>
<td></td>
<td>Music Therapy</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>OUTSIDE THE BOX, INC.</td>
<td>Indianapolis</td>
<td></td>
<td>Facility Hab-group (4.1)</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>TOGETHER WE CAN, INC</td>
<td>Indianapolis</td>
<td></td>
<td>Community Habilitation-indiv</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>TOGETHER WE CAN, INC</td>
<td>Indianapolis</td>
<td></td>
<td>Res Habilitation - Daily Rate</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
<tr>
<td>TOGETHER WE CAN, INC</td>
<td>Indianapolis</td>
<td></td>
<td>Transportation - (1 Way)</td>
<td>06/01/18</td>
<td>05/31/19</td>
</tr>
</tbody>
</table>

My Provider Agency Caseload Assignments

<table>
<thead>
<tr>
<th>Name</th>
<th>Assign to Caseload</th>
<th>Unassign from Caseload</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Doe</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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