

BDDS Portal Provider Training 6:

Document Library

September 25, 2018



Document Library

HOME

TOBY KEITH - Documents

KEITTOB*100433738099

Waiver: CIH-Pending

Case Mgr: Cathy Case Manager

CMCO: CMCO Test Agency

PCISP

Profile

Case Notes

Documents

Monitoring Checklist

Transitions



The Document Library is found on the individual specific navigation bar within the profile.



Document Library: Search

Search							+ Upload Document	
Category	Sub...	Month/...	Upload...	Upload...	Comm...	Document Name		
BDDS	LOC Decisi...		2/12/2018	Sandra Sh...	Decision let...	LOC_Decision_Letter.PDF		
BDDS	LOC Asses...		2/12/2018		Level Of C...	LOC Screening.PDF		
BDDS	LOC Decisi...		2/12/2018		Decision let...	LOC_Decision_Letter.PDF		
BDDS	LOC Decisi...		2/12/2018		Decision let...	LOC_Decision_Letter.PDF		
BDDS	LOC Asses...		2/12/2018		Level Of C...	LOC Screening.PDF		
BDDS	LOC Asses...		2/12/2018		Level Of C...	LOC Screening.PDF		
Legal	Guardianship	Feb 2018	2/7/2018	Sandra Sh...		Lives With Client Discrepancy.docx		

Users may search for a specific document name by entering text into the search field,



Document Library: Search

Search















+ Upload Document

Category	Sub-Type	Month/...	Upload...	Upload...	Comm...	Document Name		
BDDS	LOC Decisi...		2/12/2018	Sandra Sh...	Decision let...	LOC_Decision_Letter.PDF		
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Legal	Guardianship	Feb 2018	2/7/2018	Sandra Sh...		Lives With Client Discrepancy.docx		

Sort by clicking on any column header



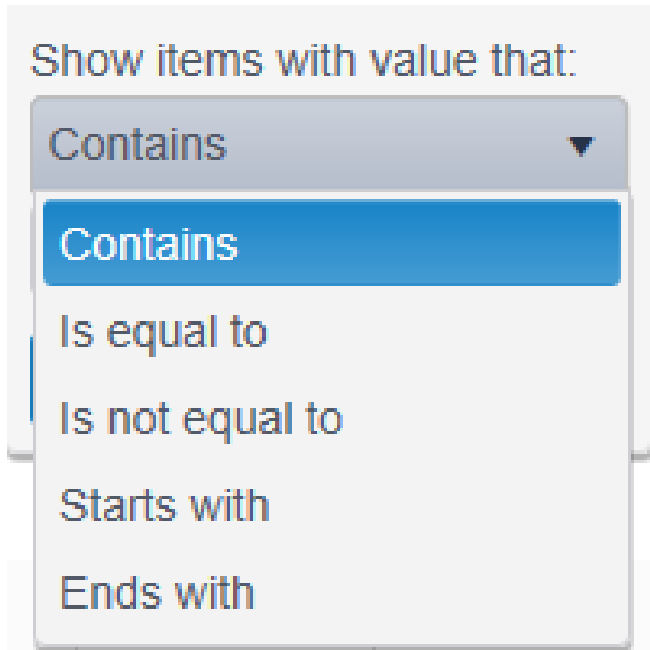
Document Library: Search

Search							+ Upload Document	
Category	Sub-Type	Month/...	Upload...	Upload...	Comm...	Document Name		
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Legal	Guardianship	Feb 2018	2/7/2018	Sandra Sh...		Lives With Client Discrepancy.docx		

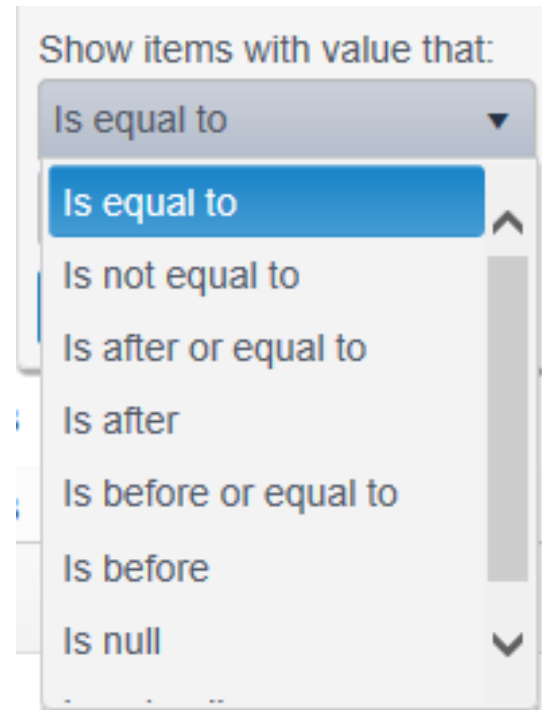
Filter data by clicking the blue filter icon at the top of the desired column.

Document Library: Search

Text Entries Filter



Date Entries Filter



When the filter icon is selected, the user will have the ability to choose how they are filtering information. Options available on the dropdown menu are specific to the column selected, for example, text versus dates.

Document Library: Search

Show items with value that:

Is equal to ▼

LOC

Filter Clear

Search

+ Upload Document

Category ▼	Sub-Type ▼	Month/... ▼	Upload... ▼	Upload... ▼	Comm... ▼	Document Name ▼		
BDDS	LOC Decisi...		2/12/2018	Sandra Sh...	Decision let...	LOC_Decision_Letter.PDF		
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Once the type of filter is chosen, the user can enter what they are searching for. In this example, we are filtering document with LOC as the subtype. Once filter is clicked, the grid will update to show only those documents that meet the filter's requirements. Filters may be used alone or in combination with other filters.



Document Library: Provider Upload

The screenshot shows the top navigation bar with the logo for the Division of Disability and Rehabilitation Services, and menu items for Home, My Cases, Processing, Resources, and Admin. A search bar is present with the text 'Search by Name, RID, or Portal ID'. The user is identified as 'Provider ADMIN User2'. Below the navigation bar, the user's name 'JANE DOE' is displayed, along with a '- Documents' breadcrumb. The case information includes 'DOEJAN#####', 'Portal ID: 123456', 'Case Mgr: Casey Manager', 'CMCO: Test CMCO', and 'Waiver: FSW-Active /'. A secondary navigation bar contains links for PCISP, Profile, Documents (which is the active tab), Monitoring Checklist, and Transitions. Below this is a search input field and a '+ Upload Document' button. A table header is visible with columns: Category, Sub-Type, Month/Year, Upload Date, Uploaded B..., Comments, Document Name, and File Size In... A red arrow points to the '+ Upload Document' button.

To upload a new document, select Upload Document.

Note: only documents with the document type of .pdf will be accepted for upload.



Document Library: Provider Upload

Upload Document ✕

File

Comments

Month/Year

Category

Sub-Type

Private *Check To Make Visible To State Employees Only*

The Upload Document modal will open, allowing the user to browse and add documents on their computer. Comments may be added if desired. The month and year will default to the current month and year.





Document Library: Provider Upload

Upload Document

File Browse...


Comments

Month/Year 

Category 

Sub-Type


Private *Check To Make Visible To State Employees Only*

February 2018 

2018

Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec

Tuesday, February 20, 2018



To change the month and/or year relating to the document select the calendar icon and chose the appropriate timeframe.

Document Library: Provider Upload

Upload Document ✕

File

Comments

Month/Year

Category

Sub-Type

- Appeals
- Assessments
- BDDS
- Behavior Mgmt
- CMCO
- Group Home
- Historical Docs
- Intake/Eligibility
- Legal
- Provider Reports
- Risk Plans
- Signature Page
- Stateline
- Transitions

Documents uploaded into the library must have a category assigned.



Document Library: Provider Upload

File Browse...

Comments

Month/Year For quarterly reports, select the first month of the quarter.

Category ▼

Sub-Type **Select one or more Sub-Types**

- Adult Days
- Advocare
- Behavioral Services
- Community Habilitation
- Electronic Monitoring
- Extended Services
- Facility Based Supports
- Facility Habilitation
- Family & Caregiver Training
- Music Therapy
- Occupational Therapy
- Participant Assistance & Care
- Physical Therapy
- Pre-Vocational
- Psychological Therapy
- Recreational Therapy
- Residential Hab
- Respite
- Speech Therapy
- Structured Family Caregiving
- Wellness
- Workplace Assistance

When selecting the Provider Reports category, please select the first month of the quarter for which the report was written.



Document Library: Provider Upload

Upload Document



File

Comments

Month/Year

Category

Sub-Type



- Adult Days
- Advocare
- Behavioral Services
- Community Habilitation
- Electronic Monitoring
- Extended Services
- Facility Based Supports
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- Residential Hab
- Respite
- Speech Therapy
- Structured Family Caregiving
- Wellness
- Workplace Assistance

You must select at least one Subtype

A sub-type is also required. Check all the Sub-Type(s) that are applicable and then click save.















Document Library: Provider Upload

							+ Upload Document	
Category	Sub-Type	Month/Year	Upload Date	Uploaded By Name	Comments	Document Name		
CMCO	Other	Feb 2018	2/13/2018	Cathy Case Manager	Document Upload	Test Document.docx		

The new document will appear at the top of the document list.



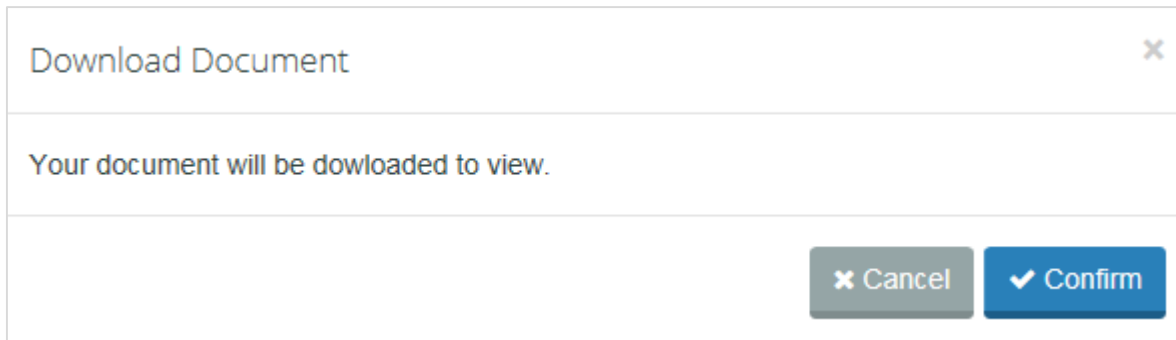
Document Library: View / Download

Search										+ Upload Document	
Category	Sub-Type	Month/...	Upload...	Upload...	Comm...	Document Name					
BDDS	LOC Decisi...		2/12/2018	Sandra Sh...	Decision let...	LOC_Decision_Letter.PDF					
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BDDS	LOC Asses...		2/12/2018		Level Of C...	LOC Screening.PDF					
BDDS	LOC Asses...		2/12/2018		Level Of C...	LOC Screening.PDF					

To view or download documents, click the download link immediately to the right of the desired document.

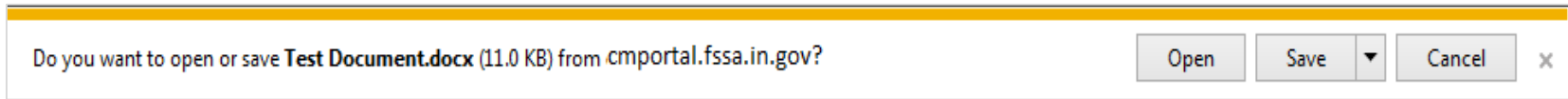


Document Library: View / Download



The download modal will open to allowing the user to confirm or cancel the selection.

Document Library: View / Download



The user will then be prompted to open and view or save the download.



Document Library: Delete Document

Search										+ Upload Document	
Category	Sub-Type	Month/...	Upload...	Upload...	Comm...	Document Name					
BDDS	LOC Decisi...		2/12/2018	Sandra Sh...	Decision let...	LOC_Decision_Letter.PDF					
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BDDS	LOC Asses...		2/12/2018		Level Of C...	LOC Screening.PDF					

Documents can only be deleted from the Document Library by the individual who uploaded it.



Document Library: Delete Document

Delete Document? ×

Do you want to delete this document? This cannot be undone.

× Cancel ✓ Confirm

A delete confirmation modal will open to confirm or cancel the document deletion. Once deleted, documents cannot be recovered.

Document Library: View or Edit Document Details

Edit Document Details



Document Name	CMP Quick Start System Navigation.pdf	
Upload Date	09/21/18	
Comments	<input type="text" value="September Provider Report"/>	
Month/Year	<input type="text" value="September 2018"/>	
Category	<input type="text" value="Provider Reports"/> ▼	
Sub-Type	<input checked="" type="checkbox"/> Adult Days <input type="checkbox"/> Advocare <input checked="" type="checkbox"/> Behavioral Services <input type="checkbox"/> Community Habilitation <input type="checkbox"/> Electronic Monitoring <input type="checkbox"/> Extended Services	

Document details may be edited by clicking on the document. The View Document Details modal will open and allow editing of the month/year, category and/or sub-type. Only the individual uploading the document may edit the document details.



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

