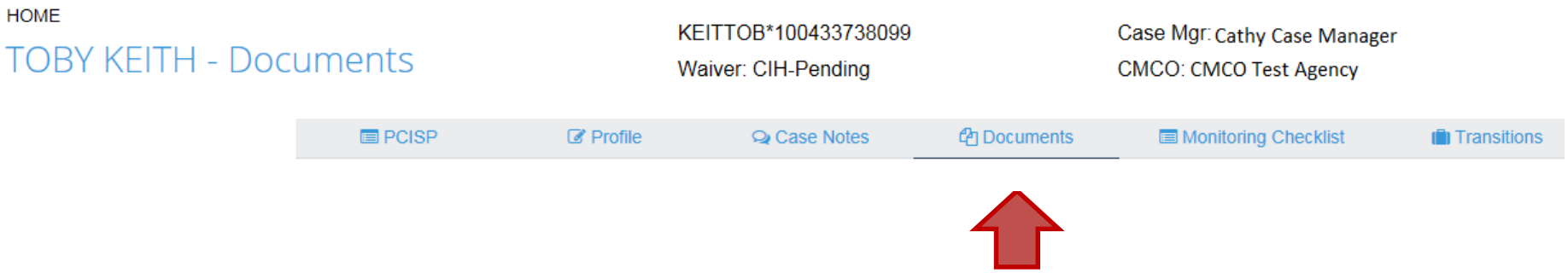
BDDS Portal Provider Training 6:

Document Library

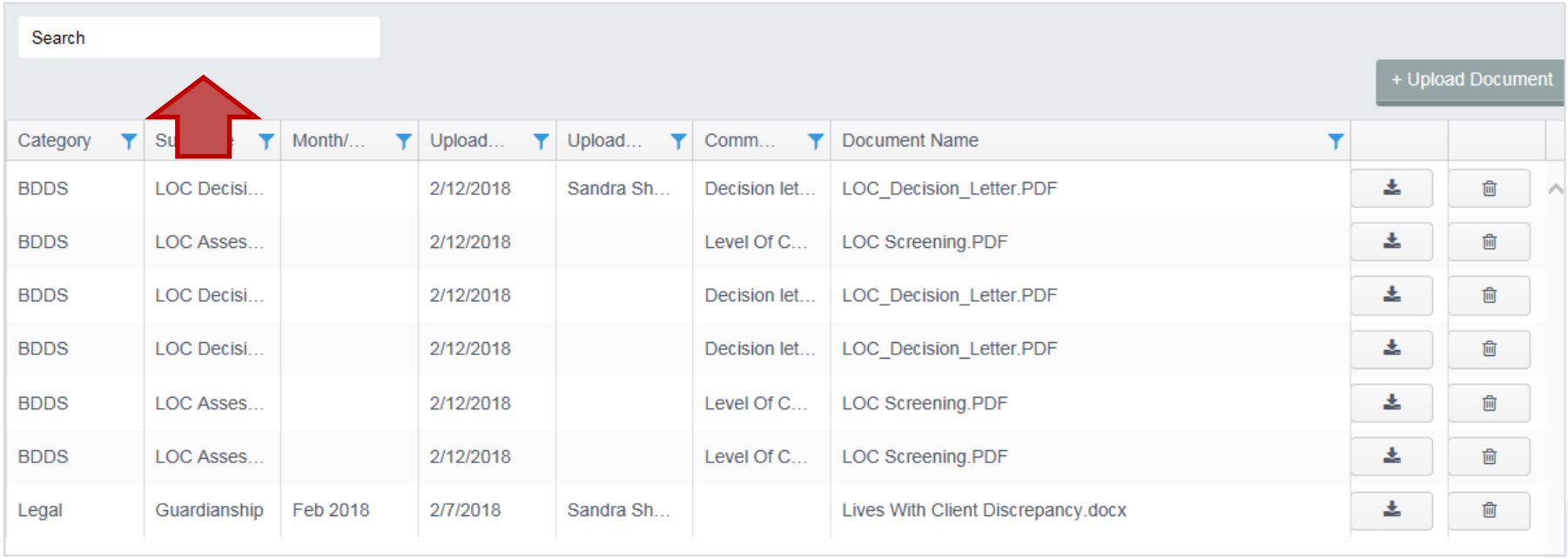
Sepetember 25, 2018

Document Library



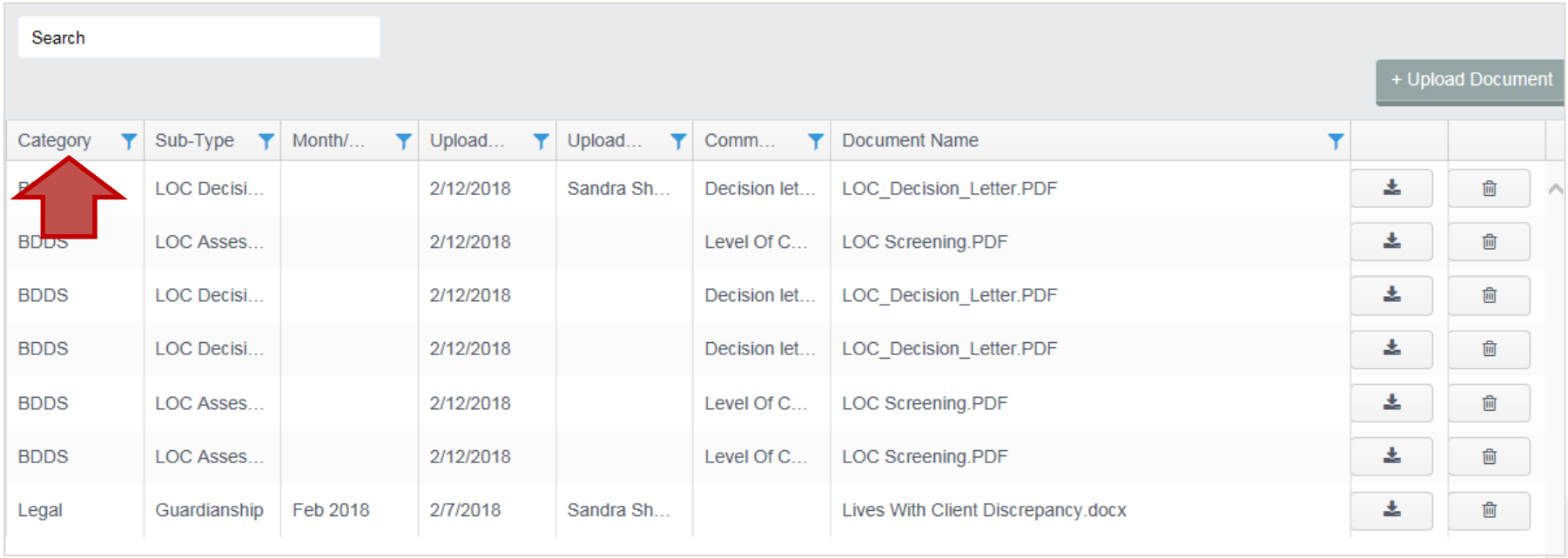
The Document Library is found on the individual specific navigation bar within the profile.

Document Library: Search



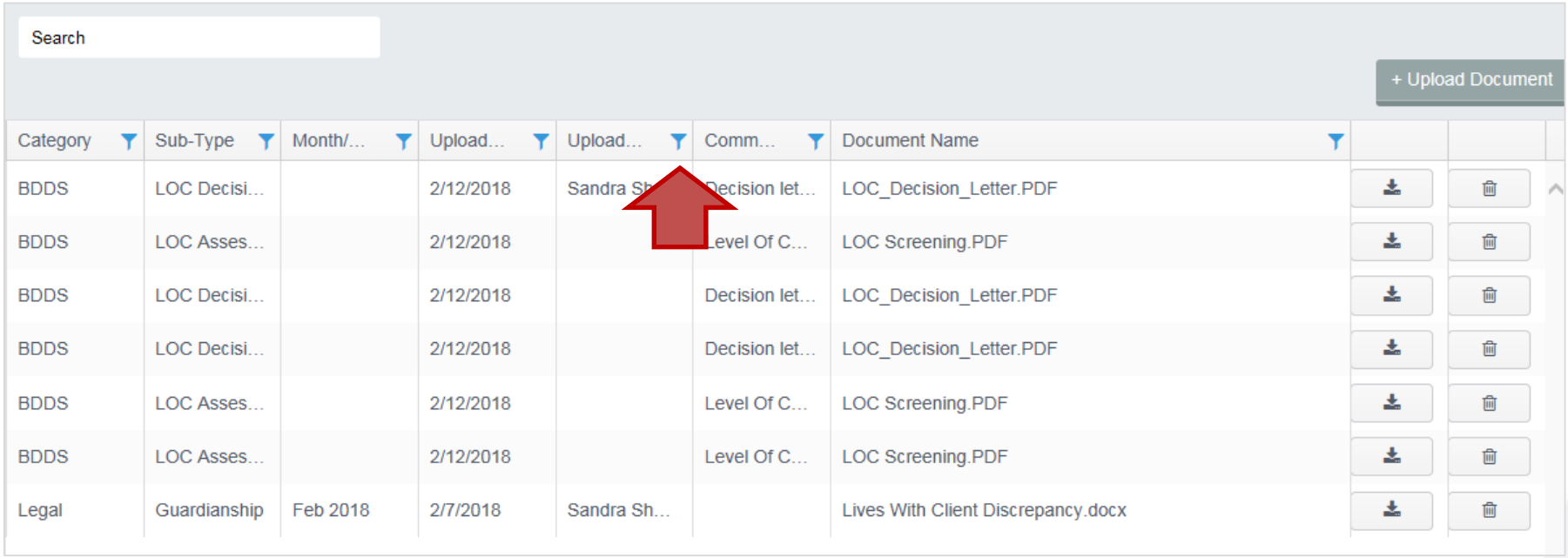
Users may search for a specific document name by entering text into the search field,

Document Library: Search



Sort by clicking on any column header

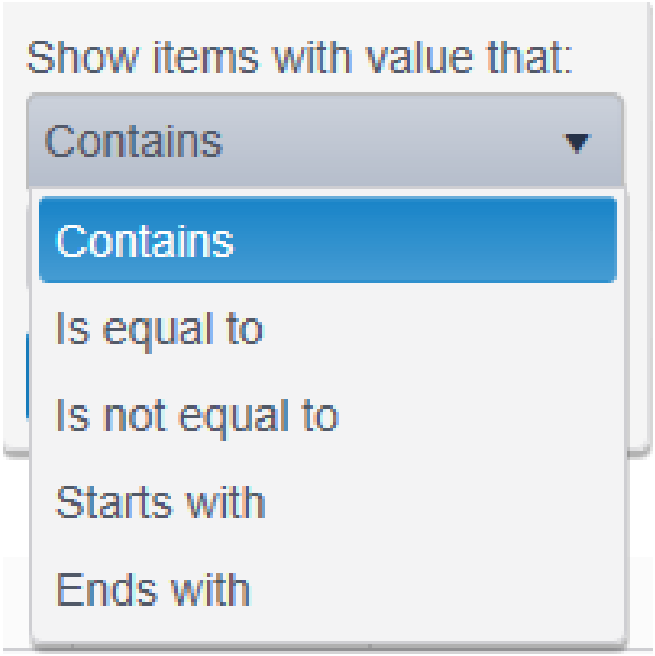
Document Library: Search



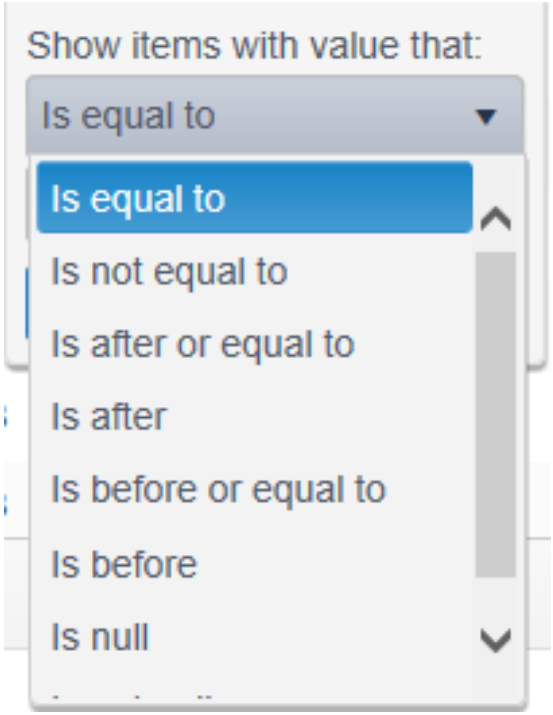
Filter data by clicking the blue filter icon at the top of the desired column.

Document Library: Search

Text Entries Filter

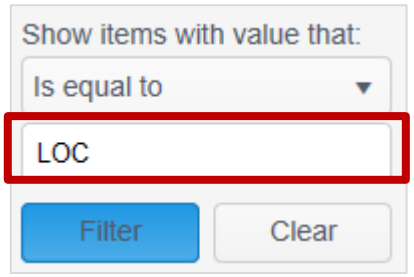


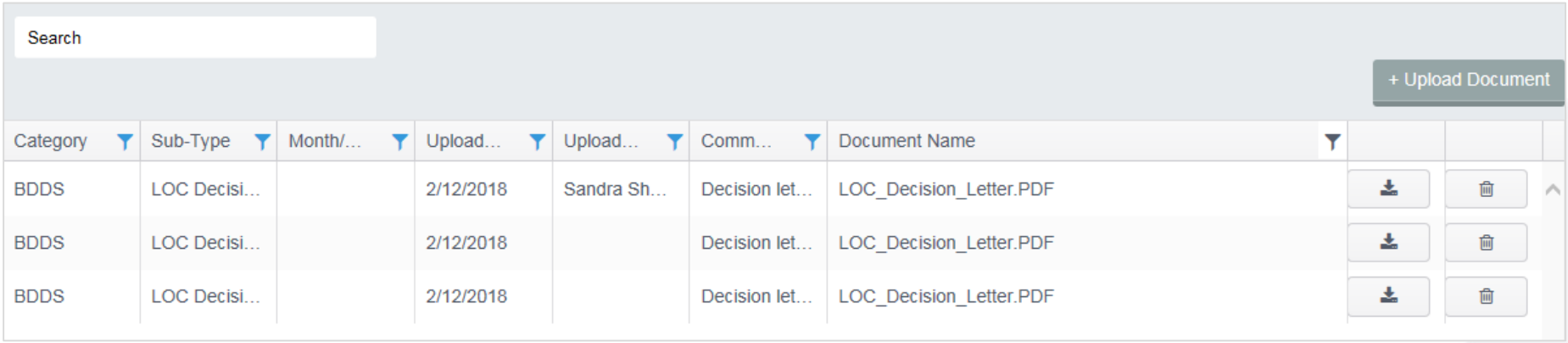
Date Entries Filter



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.

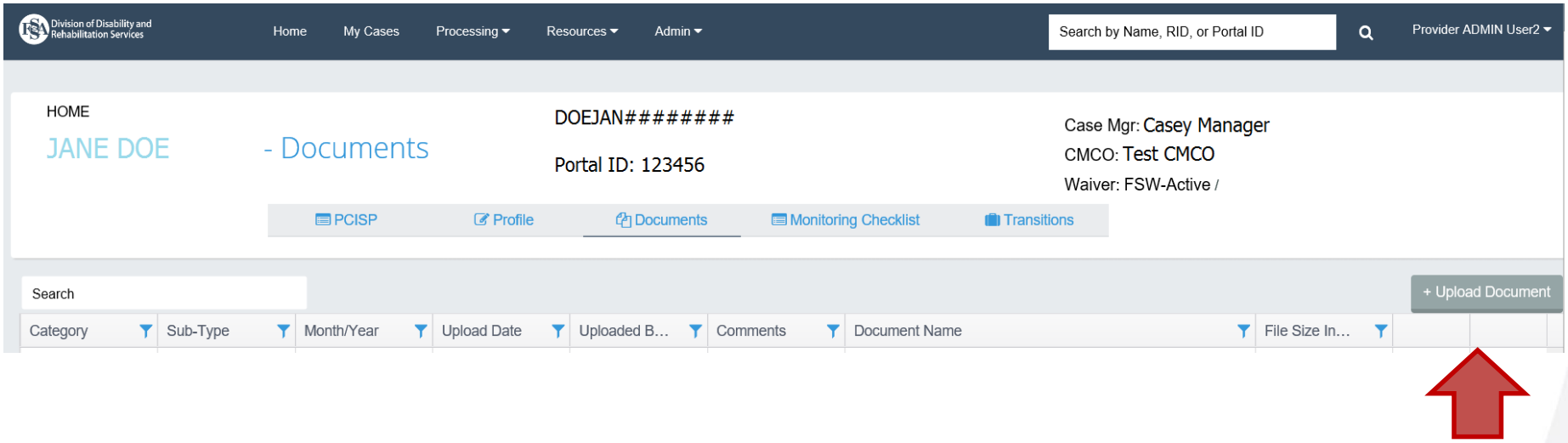
Document Library: Search





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.

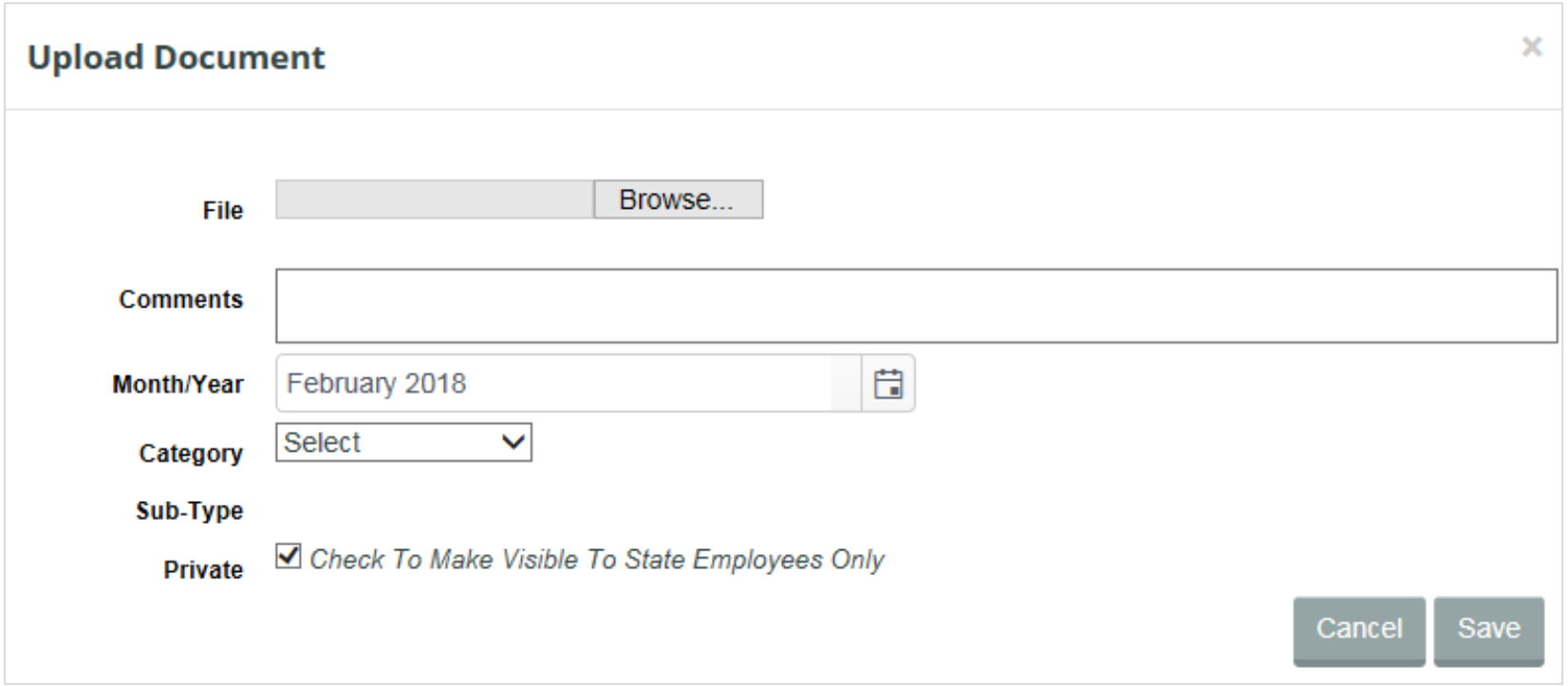
Document Library: Provider Upload



To upload a new document, select Upload Document.

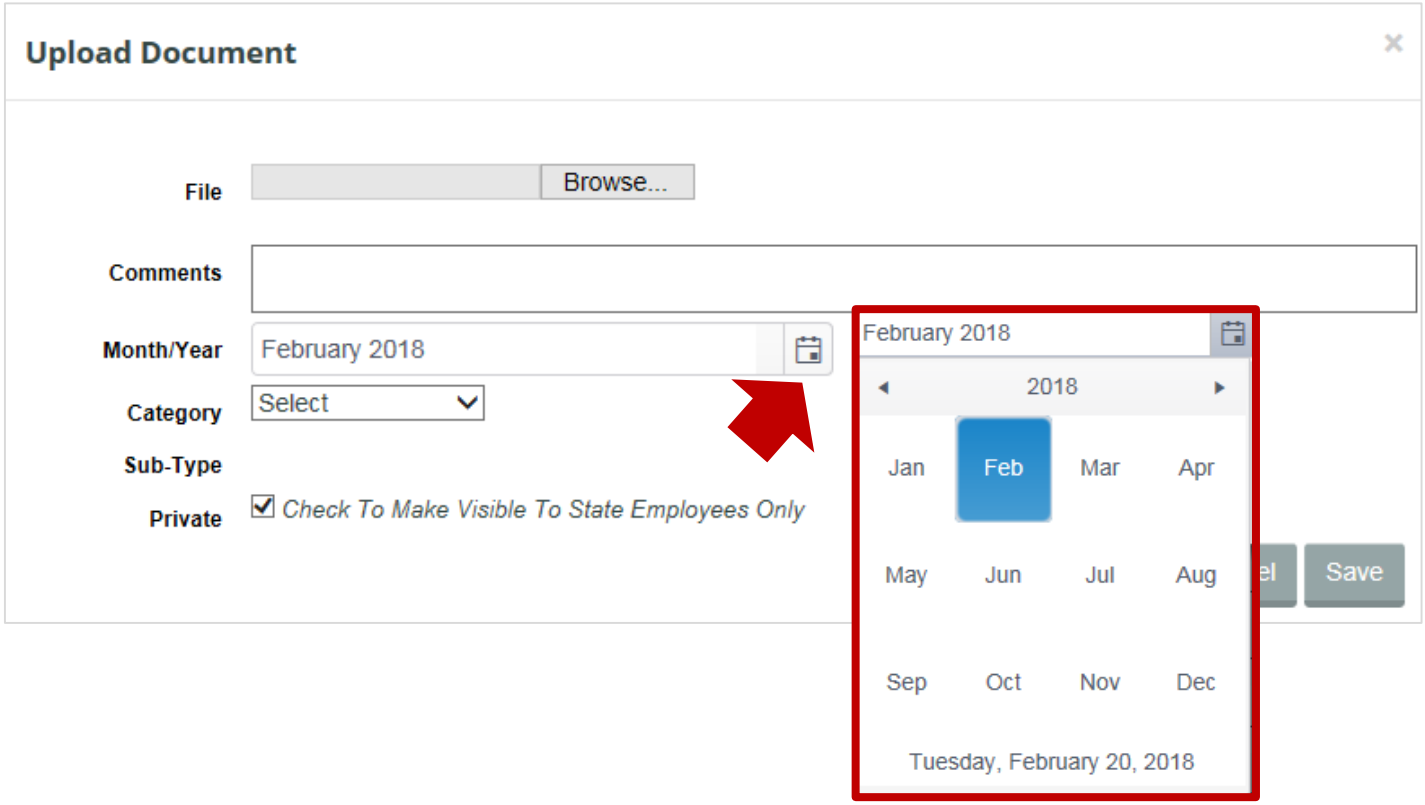
Note: only documents with the document type of .pdf will be accepted for upload.

Document Library: Provider Upload



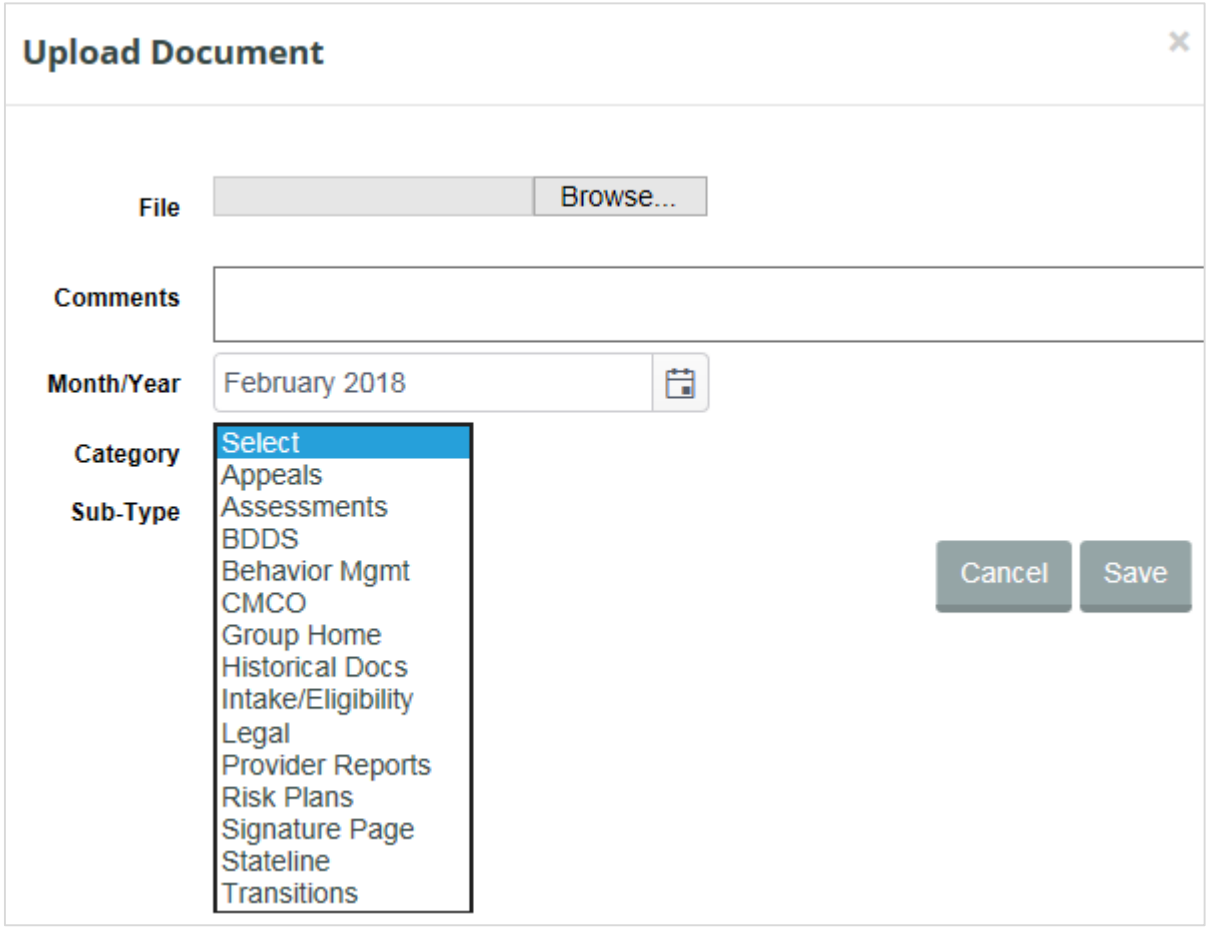
The Upload Document modal will open, allowing the user to browse and add documents on their computer. Comments may be added if desired. The month and year will default to the current month and year.

Document Library: Provider Upload



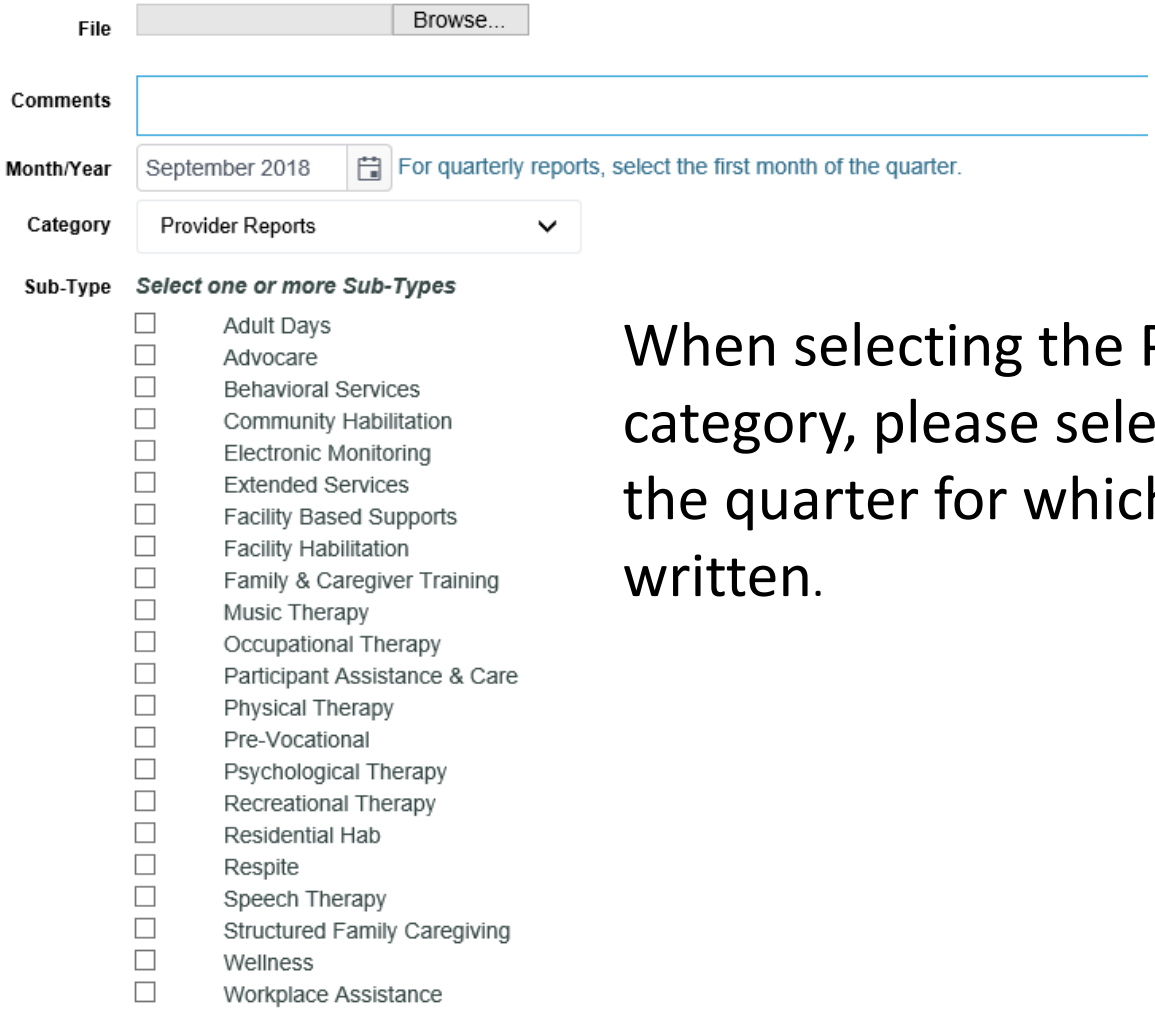
To change the month and/or year relating to the document select the calendar icon and chose the appropriate timeframe.

Document Library: Provider Upload



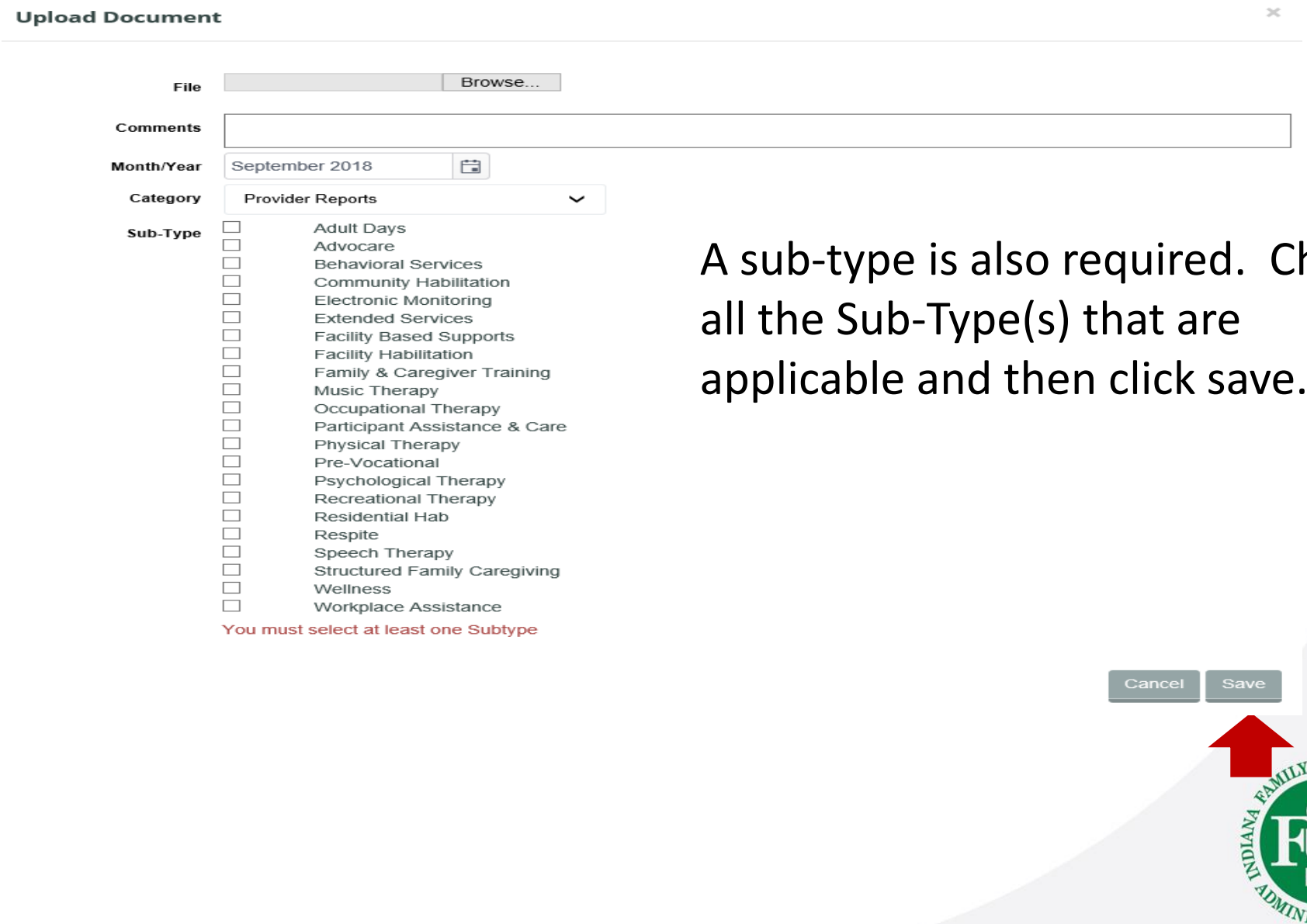
Documents uploaded into the library must have a category assigned.

Document Library: Provider Upload



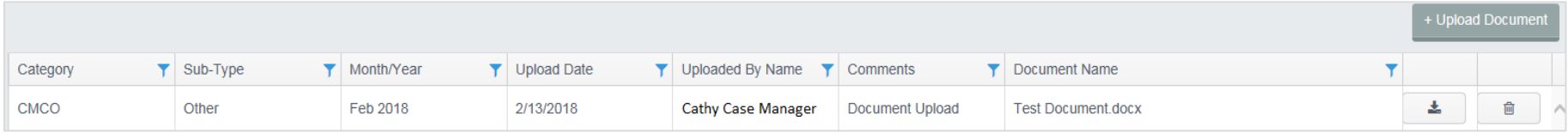
When selecting the Provider Reports category, please select the first month of the quarter for which the report was written.

Document Library: Provider Upload



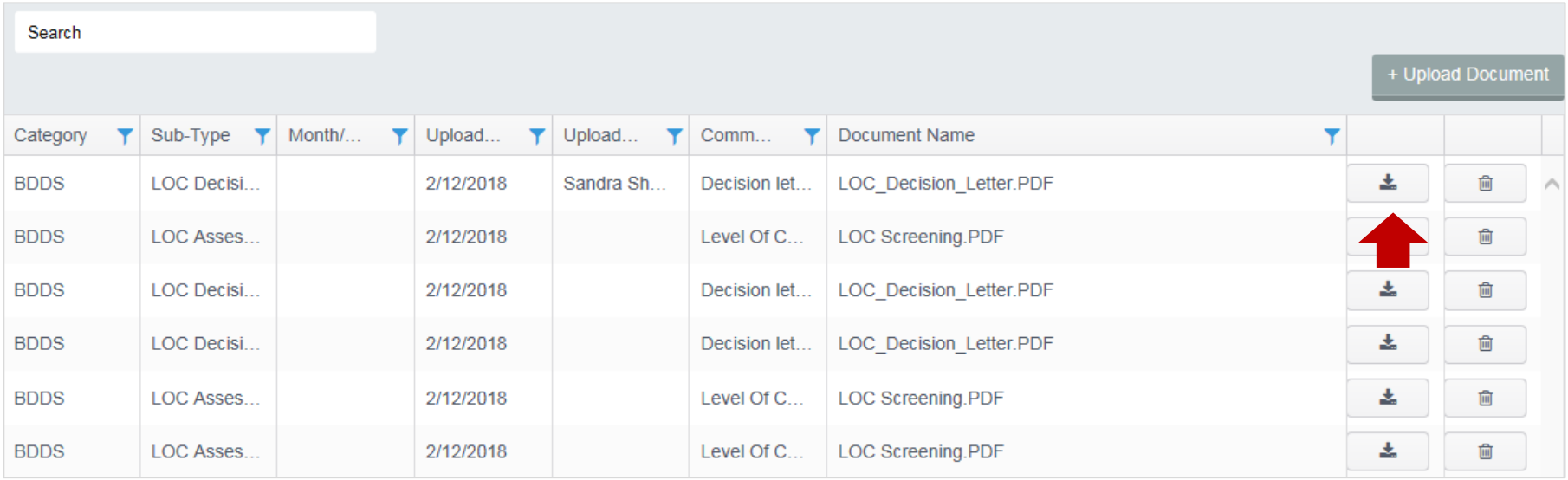
A sub-type is also required. Check all the Sub-Type(s) that are applicable and then click save.

Document Library: Provider Upload



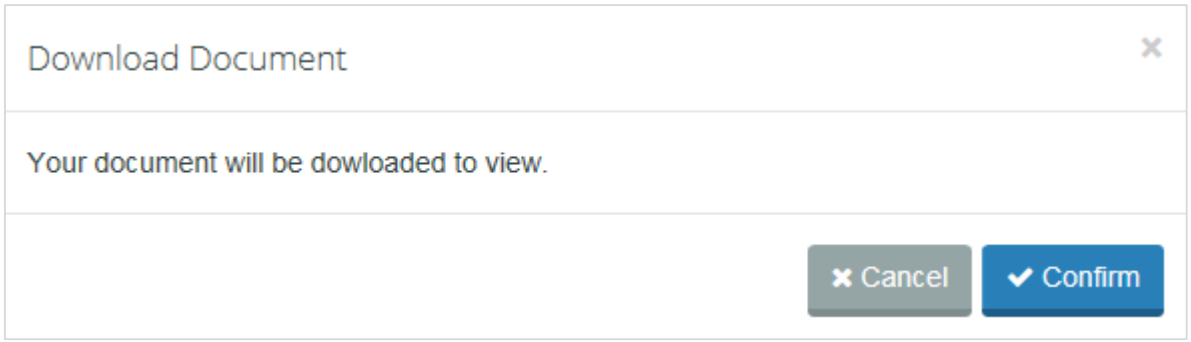
The new document will appear at the top of the document list.

Document Library: View / Download



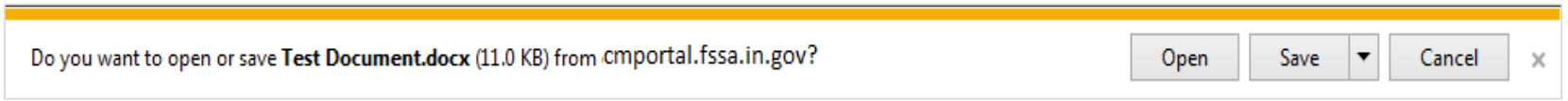
To view or download documents, click the download link immediately to the right of the desired document.

Document Library: View / Download



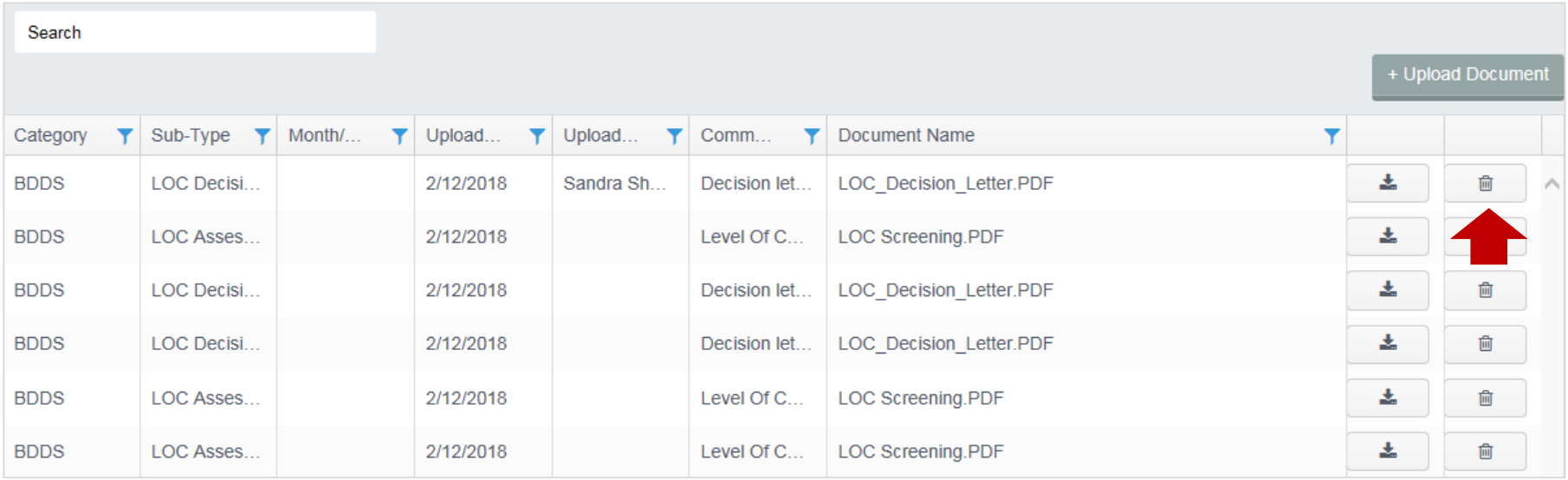
The download modal will open to allowing the user to confirm or cancel the selection.

Document Library: View / Download



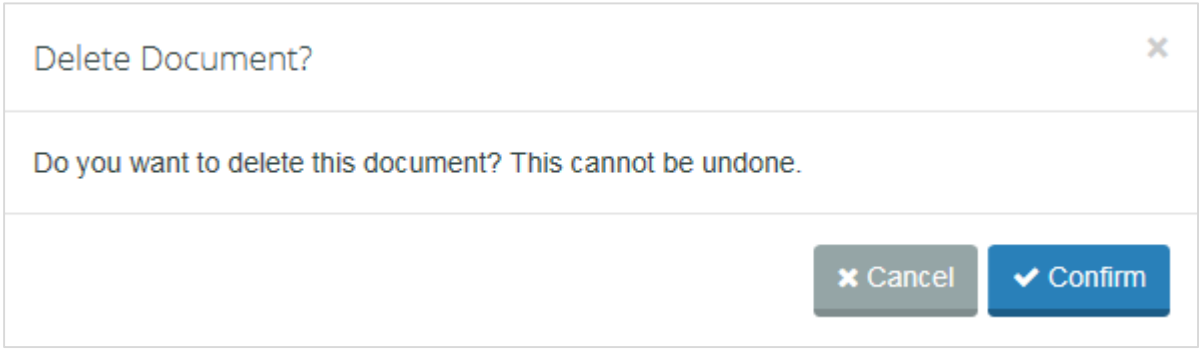
The user will then prompted to open and view or save the download.

Document Library: Delete Document



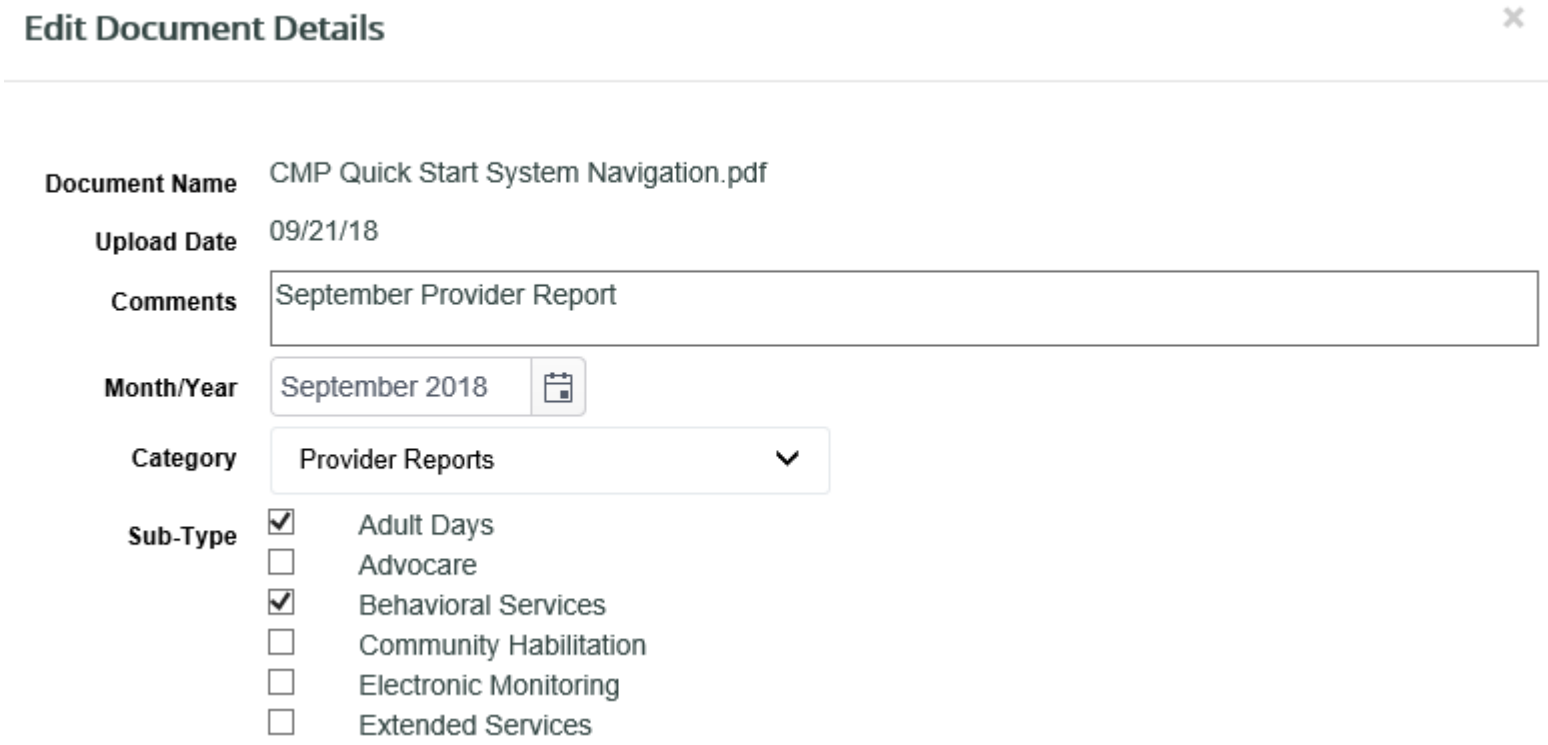
Documents can only be deleted from the Document Library by the individual who uploaded it.

Document Library: Delete Document



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



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