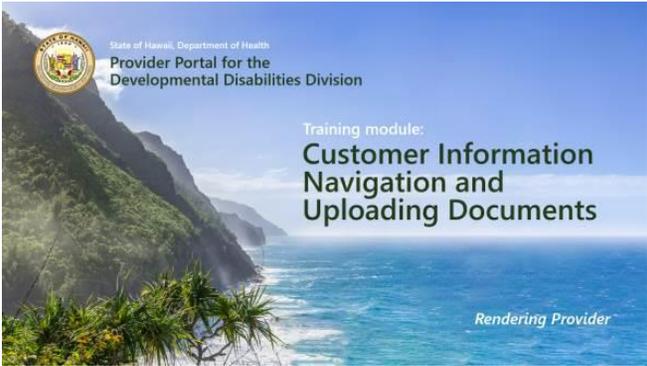




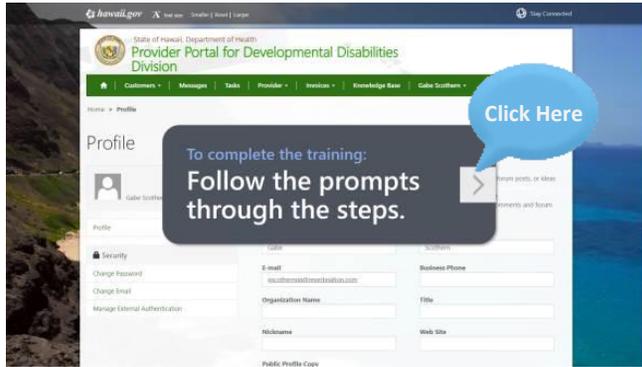
State of Hawaii, Department of Health  
**Provider Portal for the  
Developmental Disabilities Division**

Training module:  
**Customer Information  
Navigation and  
Uploading Documents**

*Rendering Provider*

Welcome	Click Instructions	Talking Points
 <p>State of Hawaii, Department of Health  <b>Provider Portal for the                  Developmental Disabilities Division</b></p> <p>Training module:  <b>Customer Information                  Navigation and                  Uploading Documents</b></p> <p><i>Rendering Provider</i></p>	<p>1.</p>	<p>Aloha!</p> <p>Welcome to this Provider Portal training for the Developmental Disabilities Division at the State of Hawaii Department of Health.</p> <p>This training module covers <i>customer information navigation and uploading documents</i> from the perspective of a <i>rendering provider</i>. For the purposes of this training, a “customer” is a participant, and “rendering providers” are either employees or independent contractors of the provider agency.</p>
 <p>State of Hawaii, Department of Health  <b>Provider Portal for the                  Developmental Disabilities Division</b></p> <p>Learning objectives:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Get to know the customer record</li> <li><input type="checkbox"/> View ISP and service authorization records</li> <li><input type="checkbox"/> Upload documents related to the customer</li> </ul> <p><i>Rendering Provider</i></p>	<p>2.</p>	<p>The learning objectives for this module are to teach you how to perform the following tasks:</p> <p>Get to know the customer record,</p> <p>View Individualized Service Plan (ISP) and service authorization records, and</p> <p>Upload documents related to the customer.</p>

Navigation



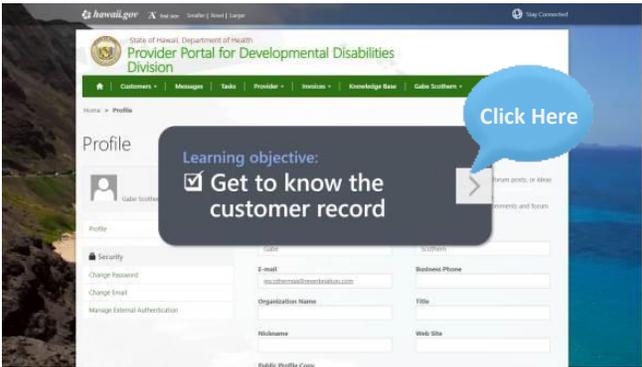
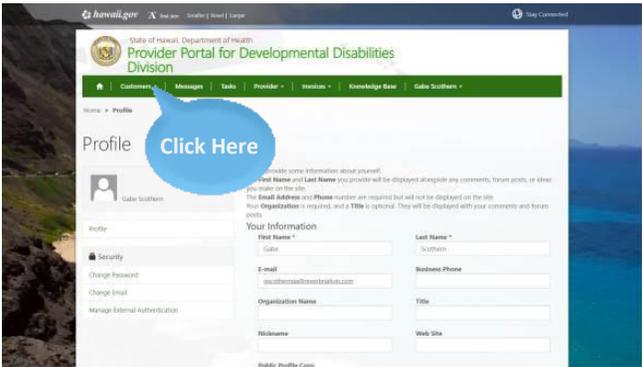
Click Instructions

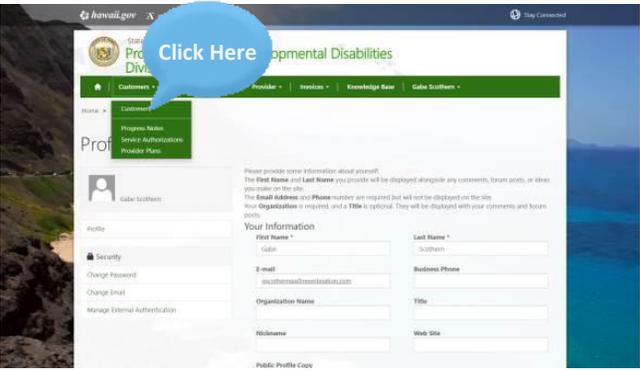
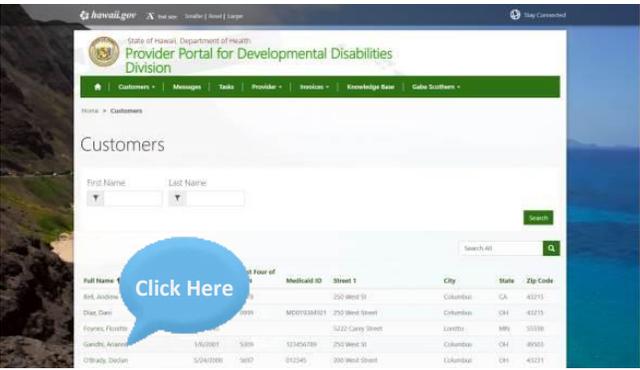
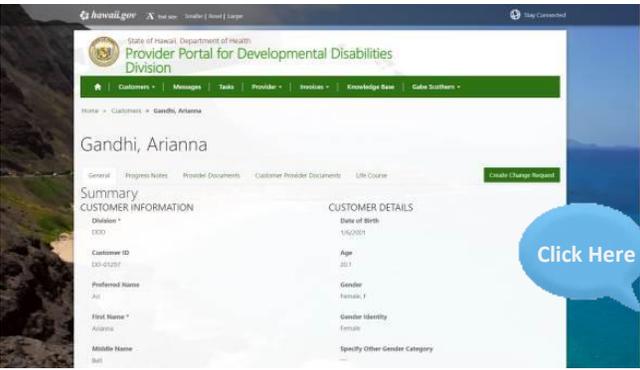
1. Click to continue.

Talking Points

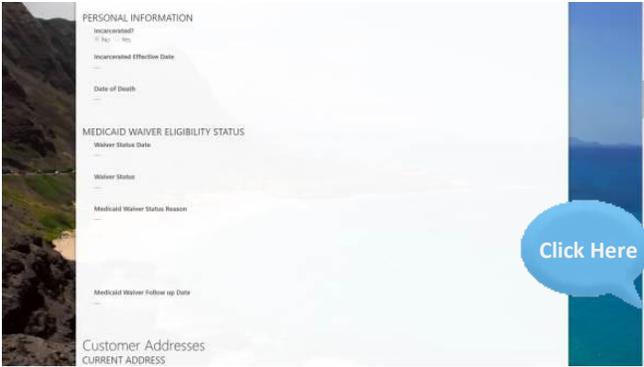
To complete the training, follow the prompts on the screen as they guide you through the steps of the process.

Let's get started.

Get to know the customer record	Click Instructions	Talking Points
 <p>The screenshot shows the 'Profile' page of the Provider Portal. A blue callout bubble with the text 'Click Here' points to a dark grey box containing a checkmark and the text 'Learning objective: Get to know the customer record'. Below this, there are various form fields for user information and security settings.</p>	<ol style="list-style-type: none"> <li>1. Click to continue.</li> </ol>	<p>First, let's get to know the customer record.</p>
 <p>The screenshot shows the 'Customers' drop-down menu in the navigation bar. A blue callout bubble with the text 'Click Here' points to the 'Customers' menu item. The rest of the page shows the 'Profile' page with various form fields.</p>	<ol style="list-style-type: none"> <li>2. Click the <b>Customers</b> drop-down arrow.</li> </ol>	<p>This is the Provider Portal, where you can access your customer records and related documents.</p> <p>To begin, click the <b>Customers</b> drop-down arrow and select <b>Customers</b>.</p>

 <p>Click Here</p>	<p>3. Click <b>Customers</b>.</p>																																												
 <p>Click Here</p> <table border="1"> <thead> <tr> <th>Full Name</th> <th>Date of Birth</th> <th>Medicaid ID</th> <th>Street 1</th> <th>City</th> <th>State</th> <th>Zip Code</th> </tr> </thead> <tbody> <tr> <td>Bill Anderson</td> <td>1/1/1950</td> <td>MO001334101</td> <td>200 West St</td> <td>Columbus</td> <td>GA</td> <td>43215</td> </tr> <tr> <td>Dina Dora</td> <td>1/1/1950</td> <td>MO001334101</td> <td>210 West Street</td> <td>Columbus</td> <td>GA</td> <td>43215</td> </tr> <tr> <td>Foyles, Florida</td> <td>1/1/1950</td> <td>MO001334101</td> <td>5222 Camp Street</td> <td>Lynchburg</td> <td>VA</td> <td>24502</td> </tr> <tr> <td>Gandhi, Arianna</td> <td>1/16/2001</td> <td>5085</td> <td>12450 West St</td> <td>Columbus</td> <td>GA</td> <td>49000</td> </tr> <tr> <td>OTWady, Declan</td> <td>5/24/2000</td> <td>5057</td> <td>012340</td> <td>200 West Street</td> <td>Columbus</td> <td>GA</td> <td>43211</td> </tr> </tbody> </table>	Full Name	Date of Birth	Medicaid ID	Street 1	City	State	Zip Code	Bill Anderson	1/1/1950	MO001334101	200 West St	Columbus	GA	43215	Dina Dora	1/1/1950	MO001334101	210 West Street	Columbus	GA	43215	Foyles, Florida	1/1/1950	MO001334101	5222 Camp Street	Lynchburg	VA	24502	Gandhi, Arianna	1/16/2001	5085	12450 West St	Columbus	GA	49000	OTWady, Declan	5/24/2000	5057	012340	200 West Street	Columbus	GA	43211	<p>4. Click <b>Gandhi, Arianna</b>.</p>	<p>This filterable view shows a list of the customer records in the system. You can select any customer record to review it. You will only see a customer listed here if your agency is providing or has accepted a referral to provide services for that participant.</p>
Full Name	Date of Birth	Medicaid ID	Street 1	City	State	Zip Code																																							
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 <p>Click Here</p>	<p>5. Click to scroll.</p>	<p>At the top of the record, you can see a summary of information about the customer, including their contact, enrollment, and personal details. This information is read-only. If you notice a discrepancy in the demographic information displayed, please contact the case manager.</p> <p>Scroll down to review the page.</p>																																											

State of Hawaii - DOH - DDD - Training Module - Customer Information Navigation & Uploading Documents

	<p>6. Click to scroll.</p>	
	<p>7. Click to scroll.</p>	
	<p>8. Click to scroll.</p>	

State of Hawaii - DOH - DDD - Training Module - Customer Information Navigation & Uploading Documents

Living with Family   Previous   4/26/2019   5/18/2020   400 University Dr   Suite 1100   Seattle   WA   98101

### Circle of Support

Connected To	Role (Job)	Authorized Representative	Emergency Contact	Colateral Contact	Start Date	End Date
Aurita Babin	Investor	No	No	No		
Ade Garofalo	Administrative	No	No	No		
Elaine Dwyer	Psychiatrist	No	No	No		
Gaureal Garofalo	Sister	No	No	No		

1 2

### This Is Who I Am

**PERSONAL DIMENSIONS**

**STRENGTHS**

Challenging personality, very close with family members and coworkers.  
Loves to cook!

**Click Here**

9. Click to scroll.

You can also see the customer’s circle of support and their information.

Scroll down to see more.

### Assessments

Assessment Type	Assessment Completed Date	Assessment Expiration Date	Score	Case
Intellectual Assessment				Garofalo, Ade - Case
ABAS-3	5/4/2019			Garofalo, Ade - Case

### Employment

Employer Name	Job Title	Current Employer?	Start Date	End Date
RP's Coffee House	Bar/Server Staff	Yes	12/01/2018	

### Individual Plans

Customer	Plan Mode	Provider	Plan Approved Date	Status Reason
Garofalo, Ade	Annual	Angela Housa, LIC	5/8/2019	Pending
Garofalo, Ade		Angela Housa, LIC		In Progress

**Click Here**

10. Click to scroll.

Here, you can see the assessments the customer has taken, employment information, and provider plans for the individual.

### Service Plans

Plan Name	Case	Customer	Start Date	End Date	Status Reason
Garofalo, Ade - RP - 1/12/2019 - 12/31/2019	Garofalo, Ade - Case	Garofalo, Ade	12/31/2019	12/31/2019	Draft
Garofalo, Ade - RP - 1/2/2021 - 1/1/2022	Garofalo, Ade - Case	Garofalo, Ade	1/2/2021	12/31/2021	Draft

### Cases

Customer	Case Number	Status Reason	Next Case Review Date	Owner
Garofalo, Ade	CAS-01900-V019197	Draft	6/19/2020	Ludie Benson

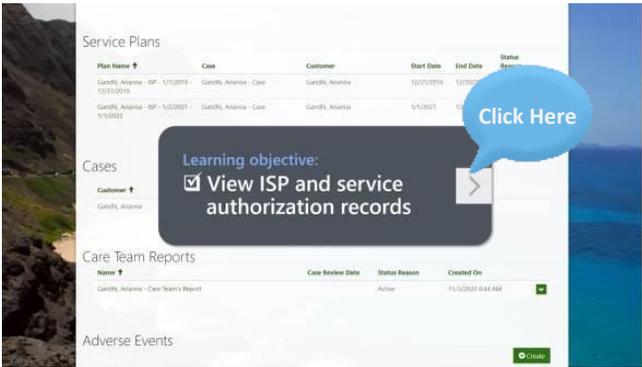
### Care Team Reports

Name	Case Review Date	Status Reason	Created On
Garofalo, Ade - Care Team's Report		Active	11/16/2020 9:44 AM

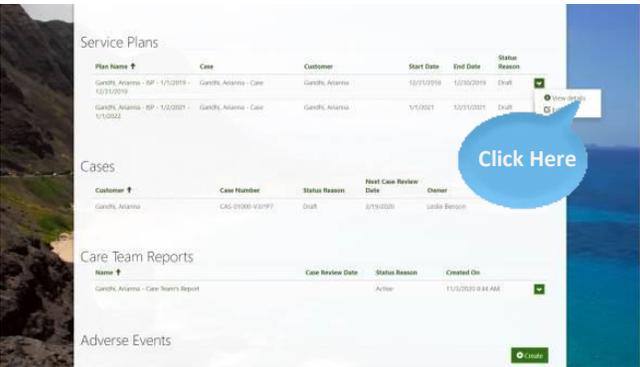
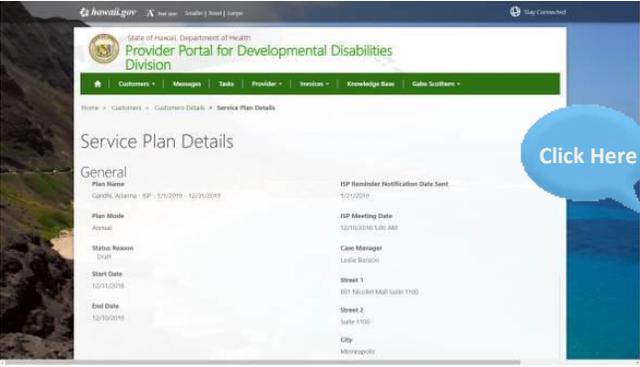
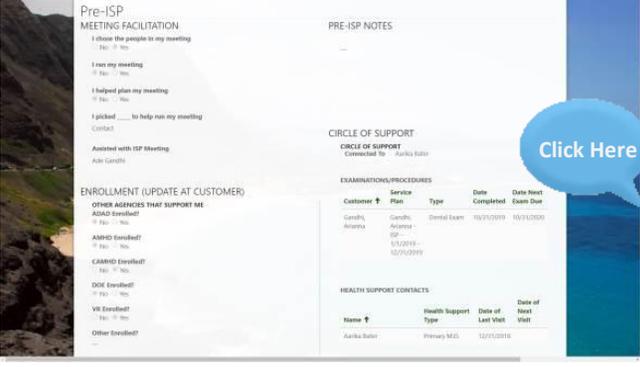
**Click Here**

11.

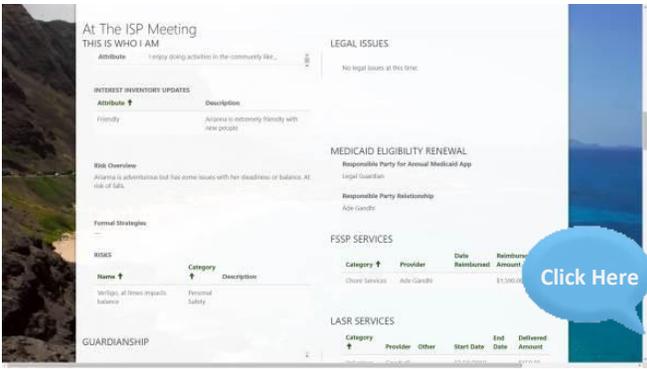
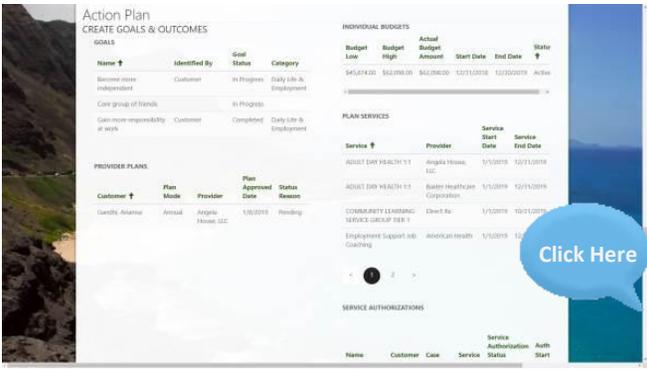
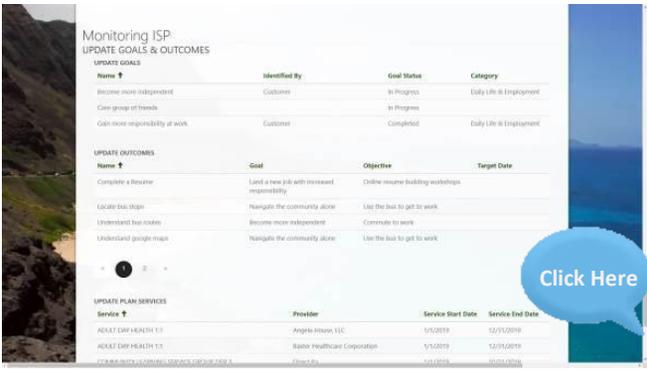
Any service plans, cases, care team reports, and adverse events for the customer also show up on this page.

View ISP and service authorization records	Click Instructions	Talking Points																																				
 <p>Service Plans</p> <table border="1"> <thead> <tr> <th>Plan Name</th> <th>Case</th> <th>Customer</th> <th>Start Date</th> <th>End Date</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Gardhi, Arizona - ISP - 1/1/2019 - 10/31/2019</td> <td>Gardhi, Arizona - Case</td> <td>Gardhi, Arizona</td> <td>10/31/2019</td> <td>10/31/2019</td> <td>Active</td> </tr> <tr> <td>Gardhi, Arizona - ISP - 1/1/2021 - 1/1/2022</td> <td>Gardhi, Arizona - Case</td> <td>Gardhi, Arizona</td> <td>1/1/2021</td> <td>1/1/2022</td> <td>Active</td> </tr> </tbody> </table> <p>Learning objective:  <input checked="" type="checkbox"/> View ISP and service authorization records</p> <p>Cases</p> <table border="1"> <thead> <tr> <th>Customer</th> <th>Case Number</th> <th>Status Reason</th> <th>Next Case Review Date</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>Gardhi, Arizona</td> <td>CAS 01800 43197</td> <td>Drift</td> <td>2/19/2021</td> <td>Judith Benson</td> </tr> </tbody> </table> <p>Care Team Reports</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Case Review Date</th> <th>Status Reason</th> <th>Created On</th> </tr> </thead> <tbody> <tr> <td>Gardhi, Arizona - Care Team's Report</td> <td></td> <td>Active</td> <td>11/30/2020 9:44 AM</td> </tr> </tbody> </table> <p>Adverse Events</p>	Plan Name	Case	Customer	Start Date	End Date	Status	Gardhi, Arizona - ISP - 1/1/2019 - 10/31/2019	Gardhi, Arizona - Case	Gardhi, Arizona	10/31/2019	10/31/2019	Active	Gardhi, Arizona - ISP - 1/1/2021 - 1/1/2022	Gardhi, Arizona - Case	Gardhi, Arizona	1/1/2021	1/1/2022	Active	Customer	Case Number	Status Reason	Next Case Review Date	Owner	Gardhi, Arizona	CAS 01800 43197	Drift	2/19/2021	Judith Benson	Name	Case Review Date	Status Reason	Created On	Gardhi, Arizona - Care Team's Report		Active	11/30/2020 9:44 AM	<p>1. Click to continue.</p>	<p>Next, let's see how to view ISP and service authorization records.</p>
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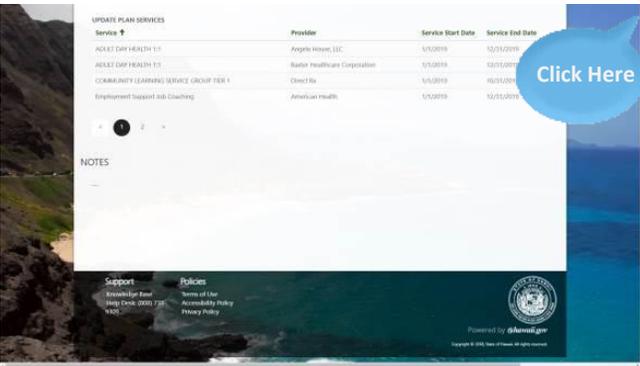
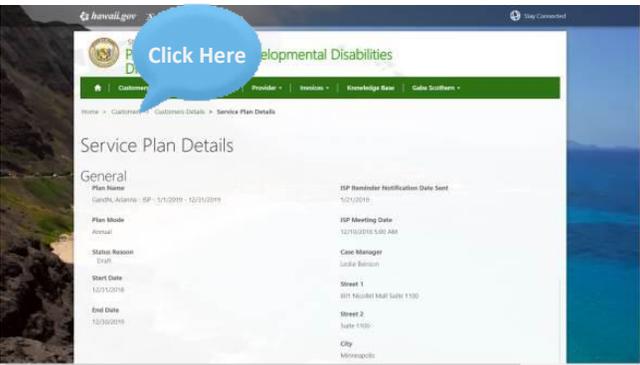
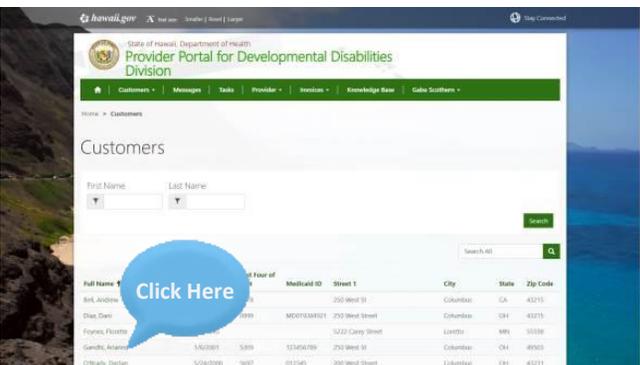
State of Hawaii - DOH - DDD - Training Module - Customer Information Navigation & Uploading Documents

	<p>3. Click <b>View details</b>.</p>	<p>In this case, we'll view the plan's details.</p>
	<p>4. Click to scroll.</p>	<p>At the top of the page, you can see general information about the service plan. Note the Status of the ISP. If the Status is Draft, the ISP is still in progress. If the Status is Complete, the ISP has been finalized.</p> <p>Scroll down to the next section.</p>
	<p>5. Click to scroll.</p>	<p>You can also see preliminary work that has been completed for the ISP, including meeting details, enrollment information, and the customer's circle of support.</p>

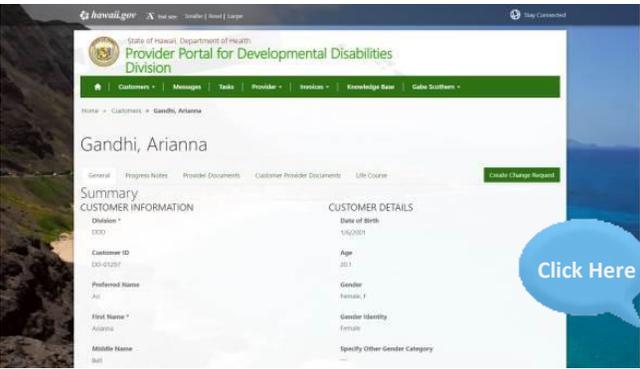
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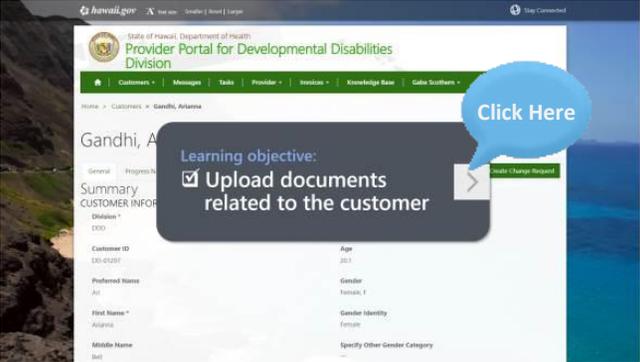
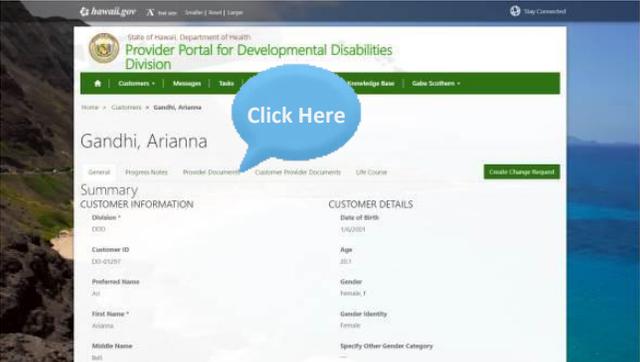
 <p>At The ISP Meeting THIS IS WHO I AM</p> <p>LEGAL ISSUES</p> <p>MEDICAID ELIGIBILITY RENEWAL</p> <p>FSSP SERVICES</p> <p>LASR SERVICES</p> <p>Click Here</p>	<p>6. Click to scroll.</p> <p>Here, you can see any information documented at the ISP meeting, such as who the customer is, legal issues, and services they are receiving.</p>
 <p>Action Plan CREATE GOALS &amp; OUTCOMES</p> <p>INDIVIDUAL BUDGETS</p> <p>PLAN SERVICES</p> <p>SERVICE AUTHORIZATIONS</p> <p>Click Here</p>	<p>7. Click to scroll.</p> <p>You can also review the action plan for the customer, which includes goals, provider plans, individual budgets, plan services, and service authorizations.</p>
 <p>Monitoring ISP UPDATE GOALS &amp; OUTCOMES</p> <p>UPDATE GOALS</p> <p>UPDATE OUTCOMES</p> <p>UPDATE PLAN SERVICES</p> <p>Click Here</p>	<p>8. Click to scroll.</p> <p>In the Monitoring ISP section, you can get a clear view of the customer's goals, outcomes, and plan services.</p>

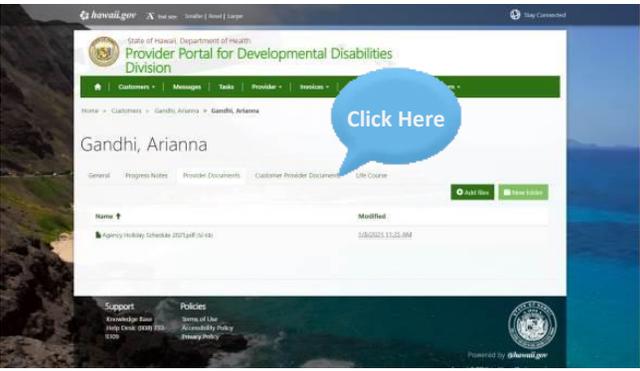
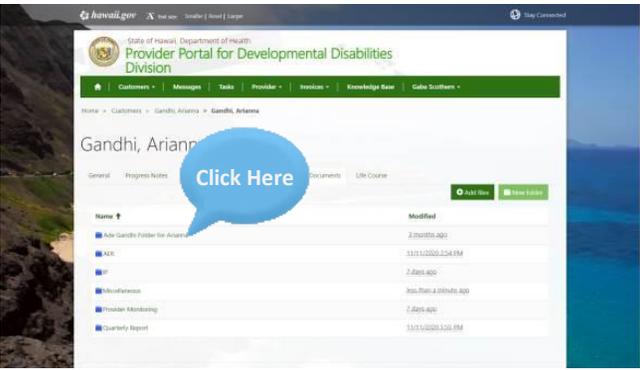
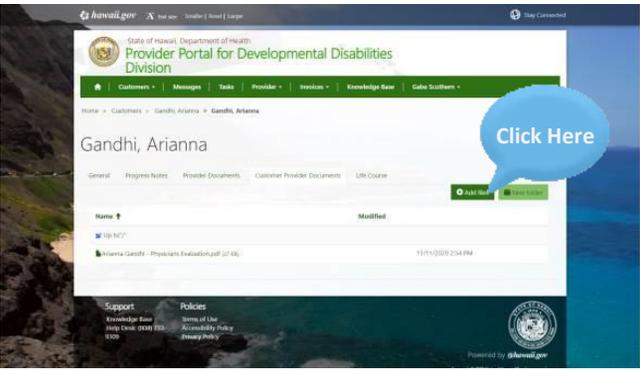
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 <p>UPDATE PLAN SERVICES</p> <table border="1"> <thead> <tr> <th>Service #</th> <th>Provider</th> <th>Service Start Date</th> <th>Service End Date</th> </tr> </thead> <tbody> <tr> <td>AKSES1 CAP HEALTH 101</td> <td>Angry House LLC</td> <td>1/1/2019</td> <td>12/31/2019</td> </tr> <tr> <td>AKSES1 CAP HEALTH 101</td> <td>Angry House LLC</td> <td>1/1/2019</td> <td>12/31/2019</td> </tr> <tr> <td>COMMUNITY LEARNING SERVICE GROUP FEE 1</td> <td>Rader Healthcare Corporation</td> <td>1/1/2019</td> <td>12/31/2019</td> </tr> <tr> <td>Employment Support Exp Coaching</td> <td>Cherch No</td> <td>1/1/2019</td> <td>12/31/2019</td> </tr> <tr> <td></td> <td>American Health</td> <td>1/1/2019</td> <td>12/31/2019</td> </tr> </tbody> </table> <p>NOTES</p> <p>Support Knowledge Base Help Desk (808) 725-7400 Policies Terms of Use Accessibility Policy Privacy Policy</p> <p>Powered by @hawaii.gov</p>	Service #	Provider	Service Start Date	Service End Date	AKSES1 CAP HEALTH 101	Angry House LLC	1/1/2019	12/31/2019	AKSES1 CAP HEALTH 101	Angry House LLC	1/1/2019	12/31/2019	COMMUNITY LEARNING SERVICE GROUP FEE 1	Rader Healthcare Corporation	1/1/2019	12/31/2019	Employment Support Exp Coaching	Cherch No	1/1/2019	12/31/2019		American Health	1/1/2019	12/31/2019	<p>9. Click to scroll.</p> <p>Any additional notes can be found here.</p> <p>Return to the top of the page.</p>															
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	American Health	1/1/2019	12/31/2019																																					
 <p>Service Plan Details</p> <p>General</p> <p>Plan Name: CAP Health 101 - SF - 1/1/2019 - 12/31/2019 Plan Mode: Annual Status Reason: Shift Start Date: 12/31/2018 End Date: 12/31/2019</p> <p>ISP Beneficial Notification Date Sent: 1/1/2019 ISP Mailing Date: 12/16/2018 5:02 AM Case Manager: Linda Bellman Street 1: 801 McLEOD ROAD Suite 1100 Street 2: Suite 1100 City: Minneapolis</p>	<p>10. Click <b>Customers</b>.</p> <p>You can view service authorizations for a customer from the customer's record.</p>																																							
 <p>Customers</p> <p>First Name: Last Name: Search</p> <table border="1"> <thead> <tr> <th>Full Name</th> <th>Medicaid ID</th> <th>Street 1</th> <th>City</th> <th>State</th> <th>Zip Code</th> </tr> </thead> <tbody> <tr> <td>Bell, Andrew</td> <td></td> <td>200 West St</td> <td>Columbus</td> <td>GA</td> <td>43215</td> </tr> <tr> <td>Chao, David</td> <td>MD01034101</td> <td>250 West Street</td> <td>Columbus</td> <td>OH</td> <td>43215</td> </tr> <tr> <td>Foyates, Placido</td> <td></td> <td>5222 Carey Street</td> <td>Louisville</td> <td>IN</td> <td>46206</td> </tr> <tr> <td>Gandhi, Arianna</td> <td>1/1/2019 5886</td> <td>17140/789</td> <td>250 West St</td> <td>Columbus</td> <td>OH</td> <td>43215</td> </tr> <tr> <td>O'Neal, Declan</td> <td>5/24/2006 5657</td> <td>012345</td> <td>300 West Street</td> <td>Columbus</td> <td>OH</td> <td>43211</td> </tr> </tbody> </table>	Full Name	Medicaid ID	Street 1	City	State	Zip Code	Bell, Andrew		200 West St	Columbus	GA	43215	Chao, David	MD01034101	250 West Street	Columbus	OH	43215	Foyates, Placido		5222 Carey Street	Louisville	IN	46206	Gandhi, Arianna	1/1/2019 5886	17140/789	250 West St	Columbus	OH	43215	O'Neal, Declan	5/24/2006 5657	012345	300 West Street	Columbus	OH	43211	<p>11. Click <b>Gandhi, Arianna</b>.</p>	
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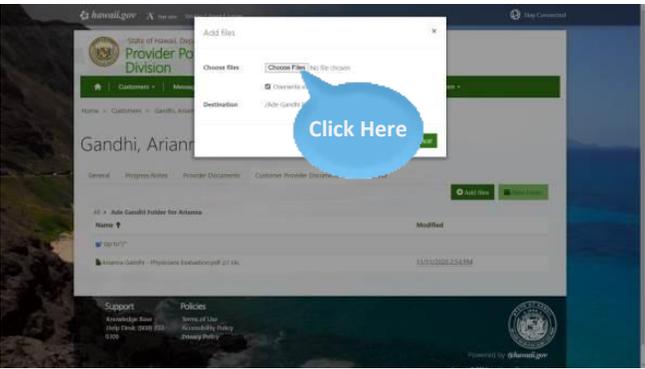
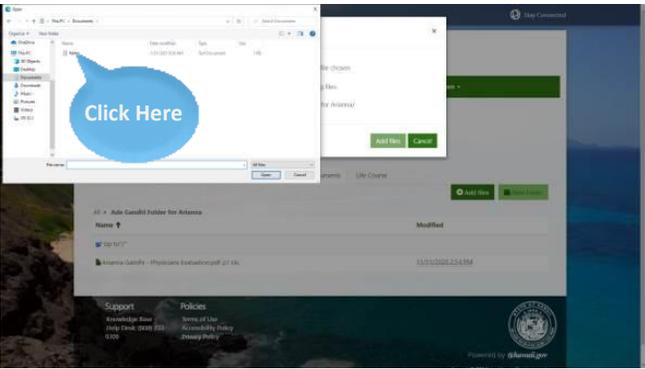
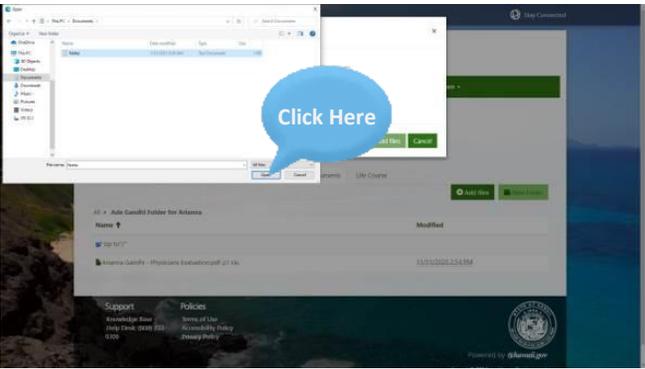
State of Hawaii - DOH - DDD - Training Module - Customer Information Navigation & Uploading Documents

	<p>12. Click to scroll.</p>	<p>Scroll down to the Service Authorizations section.</p>
	<p>13. Click to scroll.</p>	<p>Here, you can see a list of service authorizations that have been submitted for the customer, with the DDD start and end dates, units, and cost for each. This does not necessarily reflect Medicaid Online Status. Please note that the Delivered Units column is pending further development.</p>
	<p>14. Click to scroll.</p>	<p>Return to the top of the page.</p>

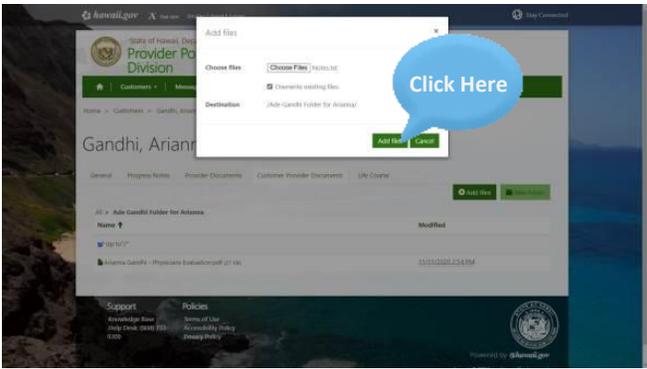
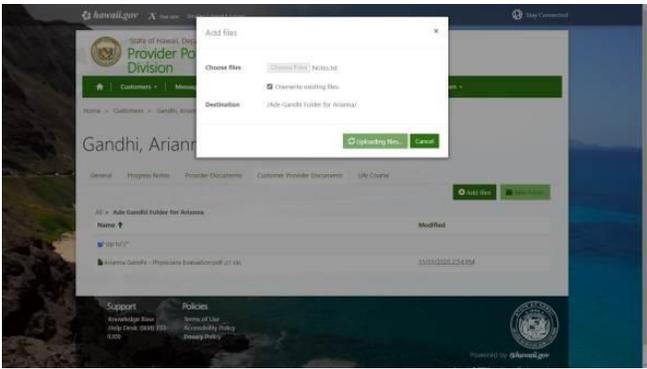
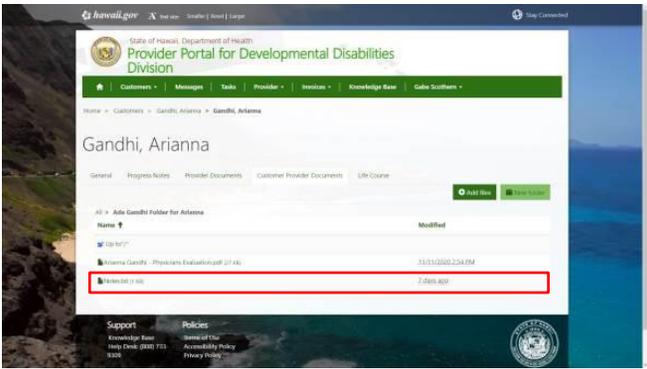
Upload documents related to the customer	Click Instructions	Talking Points
	<ol style="list-style-type: none"> <li>1. Click to continue.</li> </ol>	<p>Next, let's see how to upload documents related to the customer.</p>
	<ol style="list-style-type: none"> <li>2. Click <b>Provider Documents</b>.</li> </ol>	<p>Using the tabs at the top of the customer profile, you can view documents uploaded by other providers and add supporting documents of your own.</p> <p>First, click the <b>Provider Documents</b> tab.</p>

	<p>3. Click <b>Customer Provider Documents</b>.</p>	<p>Here, you and the other providers within the Developmental Disabilities Division can share and access documents. Please be mindful to not upload participant-specific information.</p> <p>Next, click the <b>Customer Provider Documents</b> tab.</p>
	<p>4. Click <b>Ade Gandhi Folder for Arianna</b>.</p>	<p>This tab is where you can access documents shared only between you and DDD. Other providers cannot see the information on this tab.</p> <p>To upload a new document to an existing folder, click the name of the folder and then click <b>Add files</b>.</p>
	<p>5. Click <b>Add files</b>.</p>	

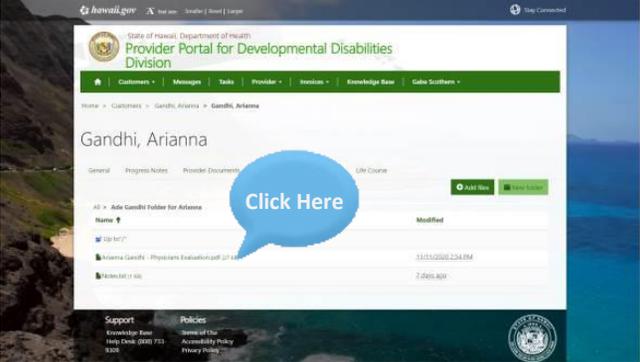
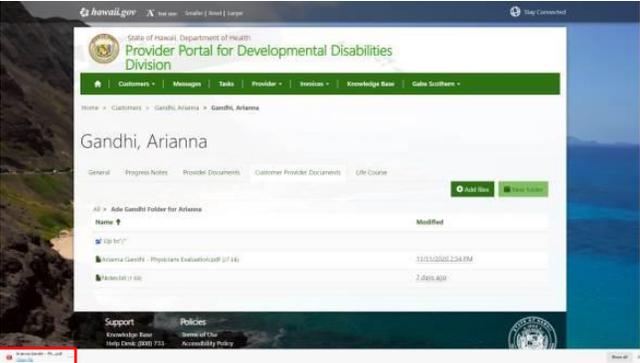
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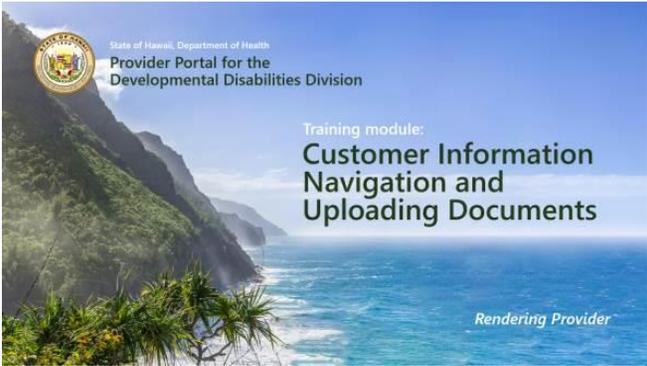
	<p>6. Click <b>Choose Files</b>.</p>	<p>Next, click <b>Choose Files</b> and open the file you want to upload.</p>
	<p>7. Click <b>Notes</b>.</p>	
	<p>8. Click <b>Open</b>.</p>	

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	<p>9. Click <b>Add files</b>.</p>	<p>Now add the files.</p>
	<p>10.</p>	
	<p>11.</p>	<p>The file now appears in the list.</p>

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	<p>12. Click <b>Arianna Gandhi – Physicians Evaluation.pdf</b>.</p>	<p>To download a file, click its name.</p>
	<p>13.</p>	<p>The downloaded file appears at the bottom left corner of the screen. You can save it or open it from here.</p>

Conclusion	Click Instructions	Talking Points
 <p>The image shows a title slide for a training module. It features a scenic background of a tropical coastline with green mountains and a blue ocean. In the top left corner is the State of Hawaii seal. Text on the slide includes: 'State of Hawaii, Department of Health', 'Provider Portal for the Developmental Disabilities Division', 'Training module:', 'Customer Information Navigation and Uploading Documents', and 'Rendering Provider'.</p>		<p>This training module is now complete.</p> <p>Thanks for watching.</p>