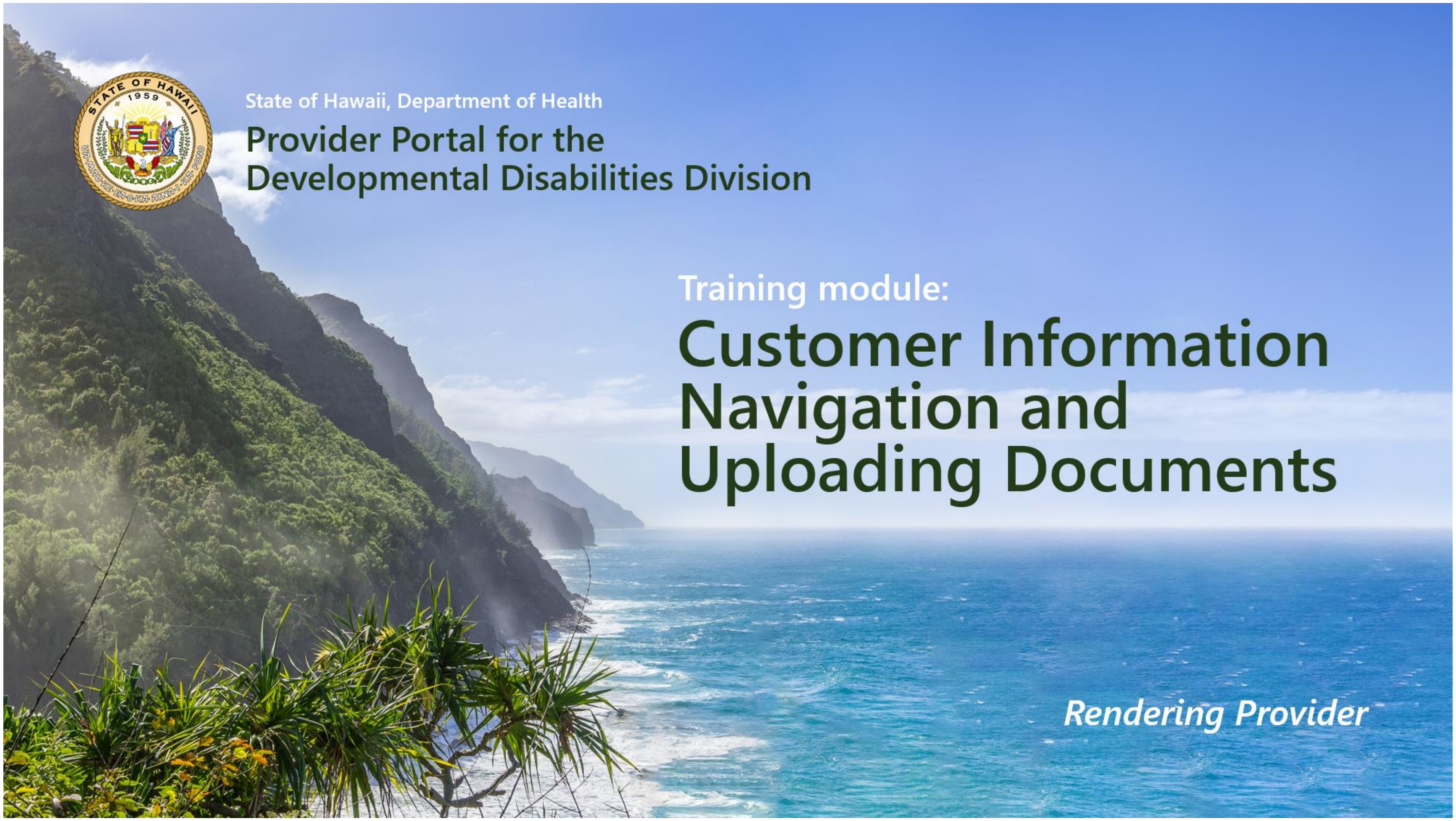
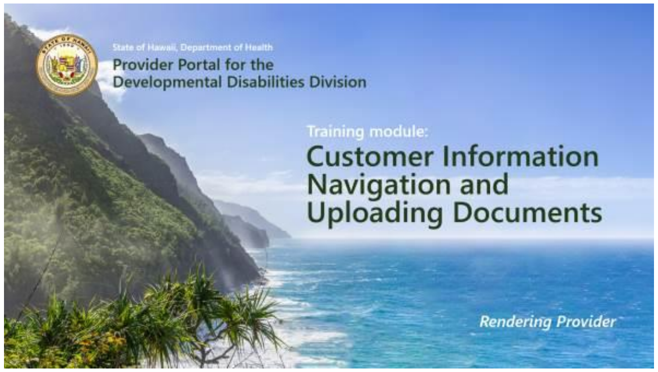
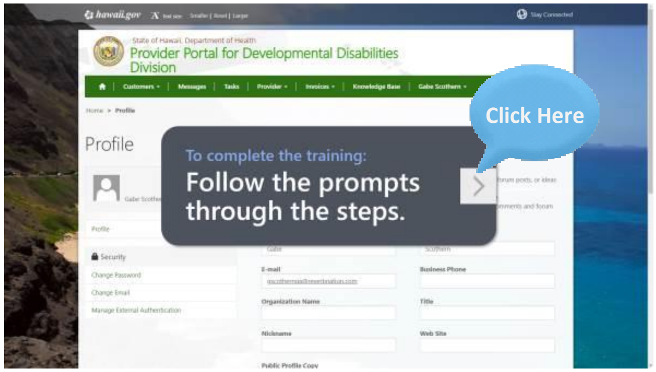
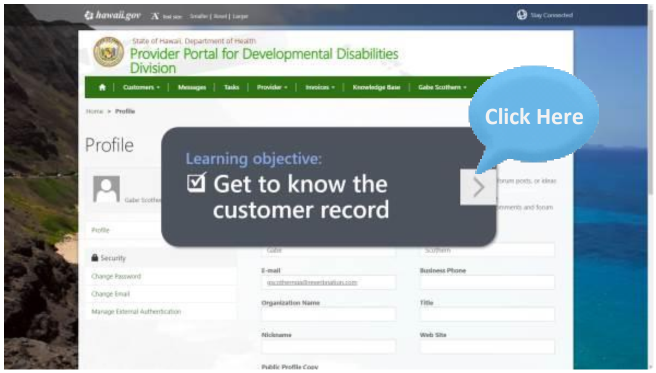
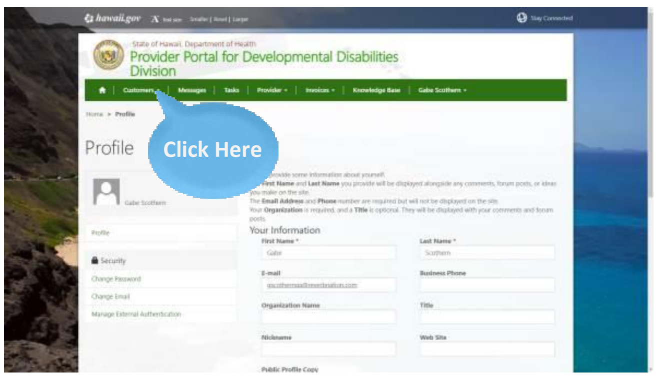
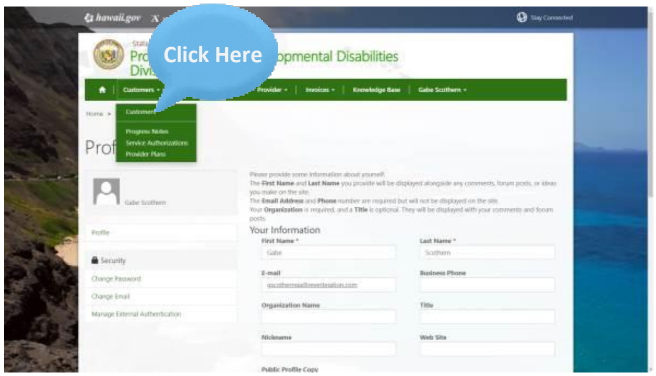
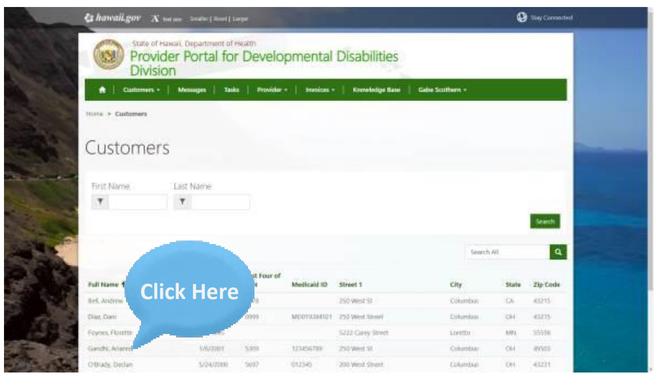
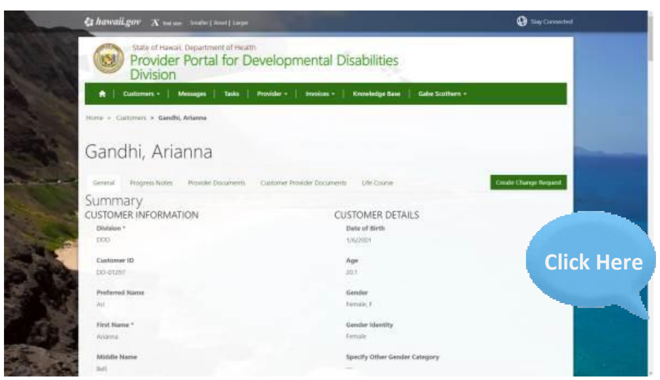

State of Hawaii, Department of Health
Provider Portal for the
Developmental Disabilities Division
Training module:
Customer Information
Navigation and
Uploading Documents
Rendering Provider

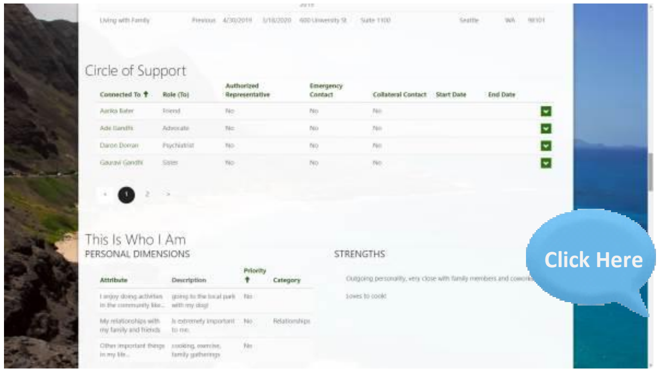
Welcome	Click Instructions	Talking Points
	1.	Aloha! Welcome to this Provider Portal training for the Developmental Disabilities Division at the State of Hawaii Department of Health. This training module covers *customer information navigation and uploading documents* from the perspective of a *rendering provider*. For the purposes of this training, a "customer" is a participant, and "rendering providers" are either employees or independent contractors of the provider agency.
	2.	The learning objectives for this module are to teach you how to perform the following tasks: Get to know the customer record, View Individualized Service Plan (ISP) and service authorization records, and Upload documents related to the customer.

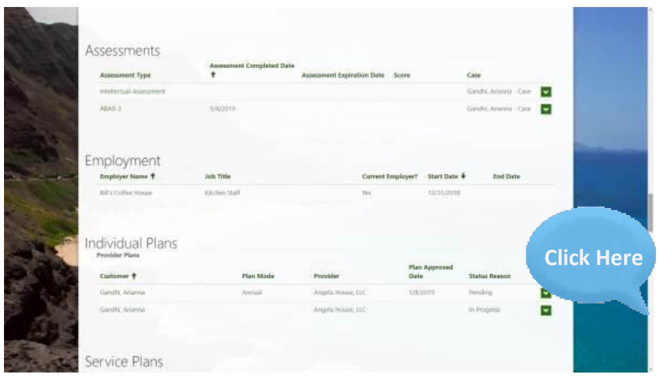
Navigation	Click Instructions	Talking Points
	1. Click to continue.	To complete the training, follow the prompts on the screen as they guide you through the steps of the process. Let's get started.

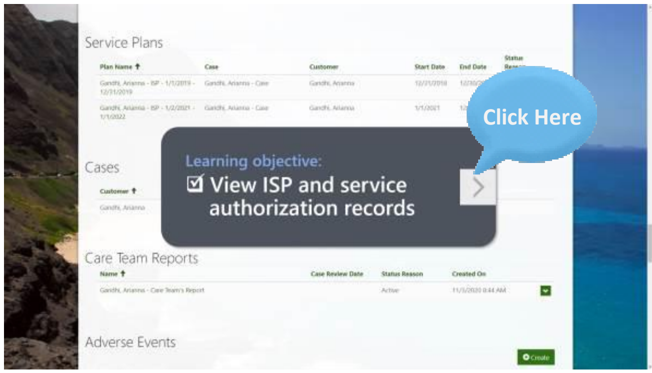
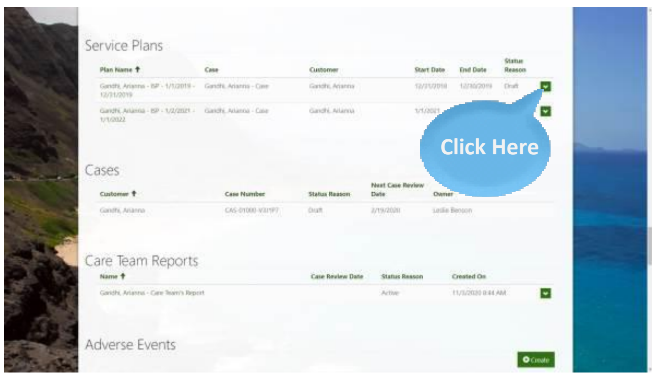
Get to know the customer record	Click Instructions	Talking Points
	1. Click to continue.	First, let's get to know the customer record.
	2. Click the **Customers** drop-down arrow.	This is the Provider Portal, where you can access your customer records and related documents. To begin, click the **Customers** drop-down arrow and select **Customers**.

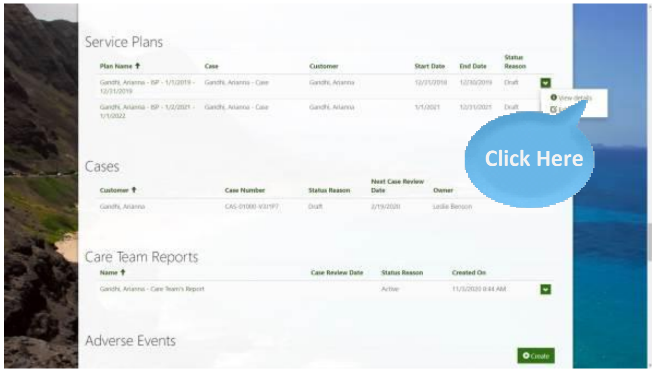
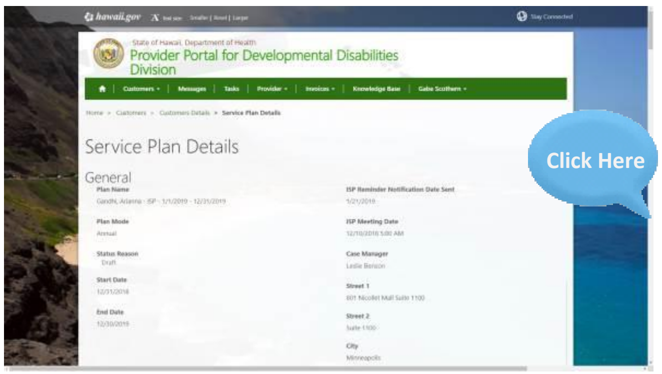
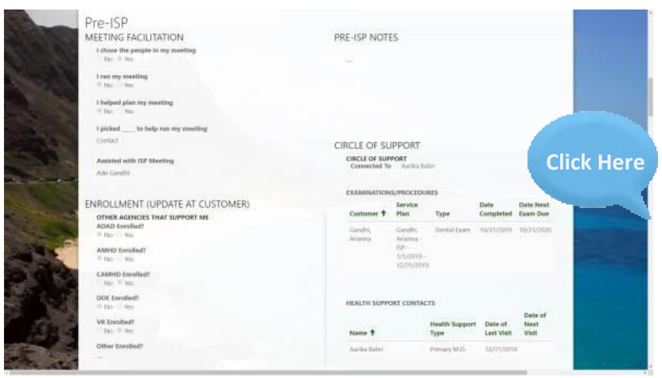
	3. Click **Customers**.	
	4. Click **Gandhi, Arianna**.	This filterable view shows a list of the customer records in the system. You can select any customer record to review it. You will only see a customer listed here if your agency is providing or has accepted a referral to provide services for that participant.
	5. Click to scroll.	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. Scroll down to review the page.

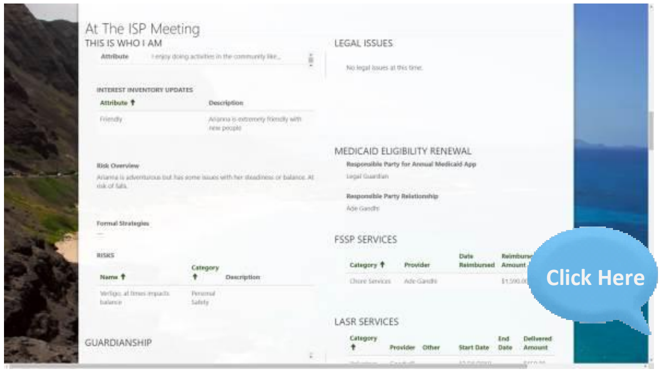
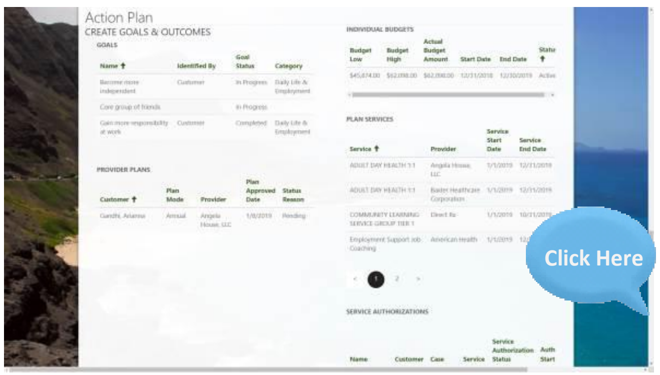
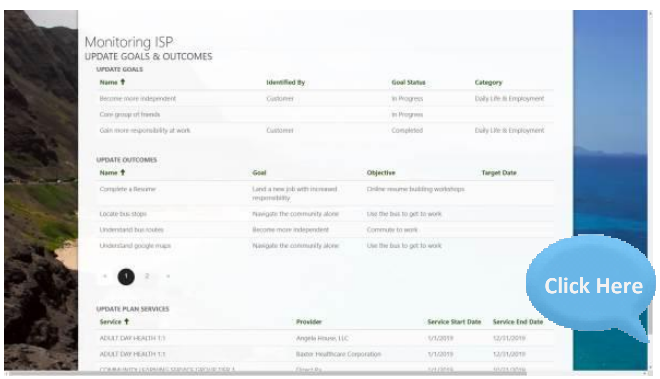
	6. Click to scroll.	
	7. Click to scroll.	
	8. Click to scroll.	

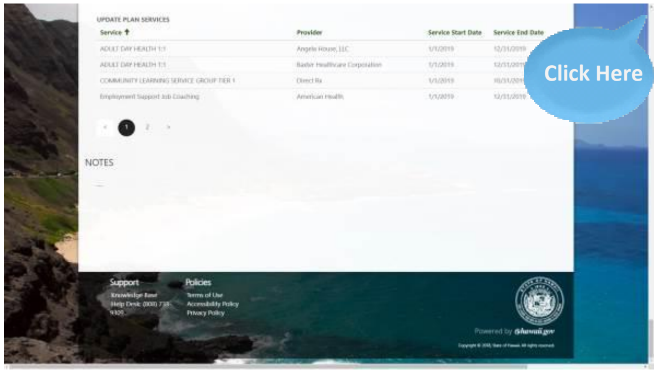
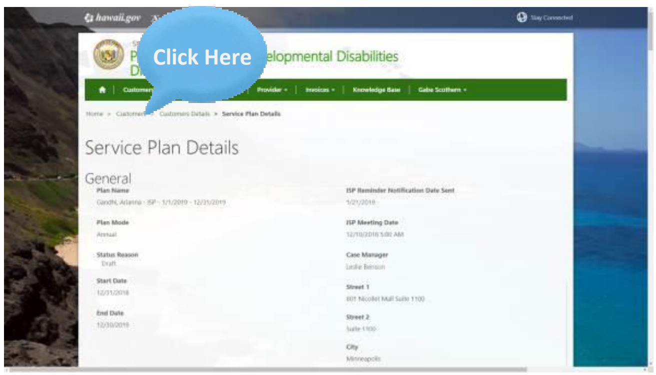
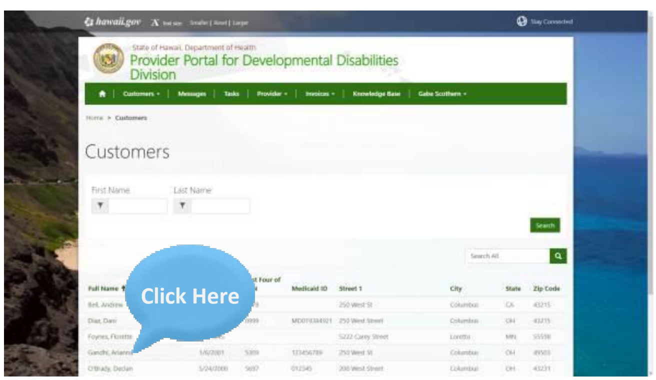
<table>
<tr>
<td>
</td>
<td>9. Click to scroll.</td>
<td>You can also see the customer’s circle of support and their information.

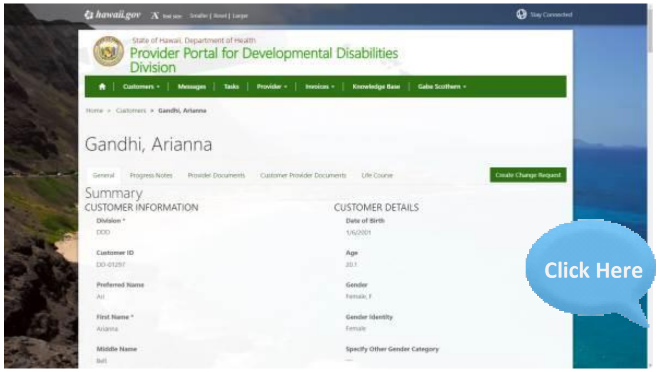
Scroll down to see more.</td>
</tr>
<tr>
<td>
</td>
<td>10. Click to scroll.</td>
<td>Here, you can see the assessments the customer has taken, employment information, and provider plans for the individual.</td>
</tr>
<tr>
<td>
</td>
<td>11.</td>
<td>Any service plans, cases, care team reports, and adverse events for the customer also show up on this page.</td>
</tr>
</table>

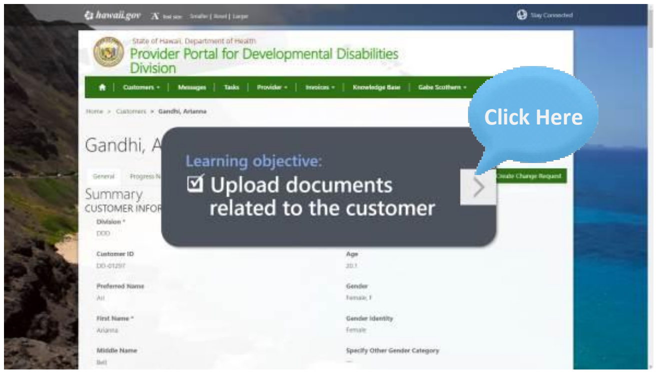
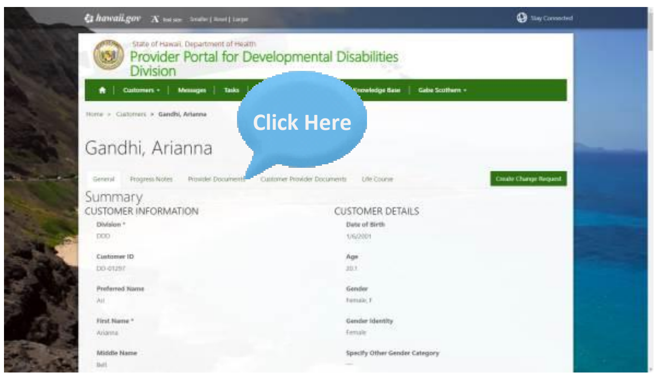
View ISP and service authorization records	Click Instructions	Talking Points
	1. Click to continue.	Next, let's see how to view ISP and service authorization records.
	2. Click the drop-down arrow.	To view a service plan, click the drop-down arrow next to it.

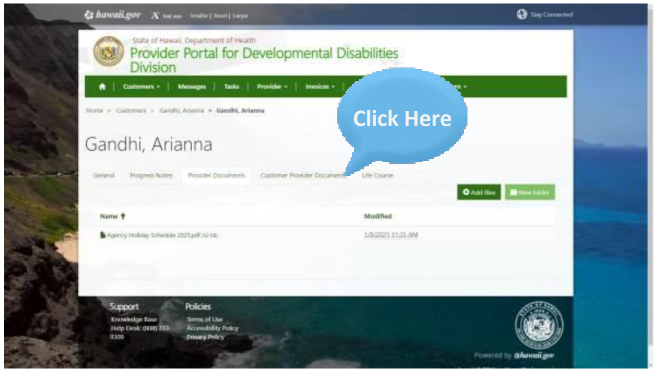
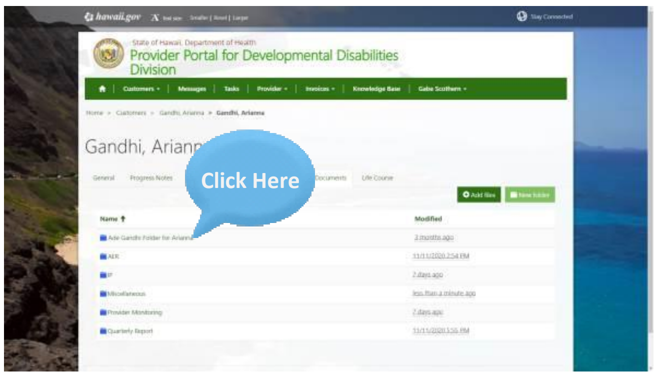
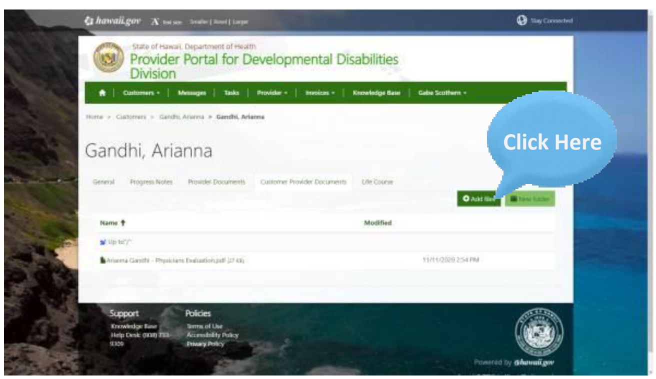
	3. Click **View details**.	In this case, we'll view the plan's details.
	4. Click to scroll.	At the top of the page, you can see general information about the service plan. Note the Status of the ISP. If the Status is Draft, the ISP is still in progress. If the Status is Complete, the ISP has been finalized. Scroll down to the next section.
	5. Click to scroll.	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.

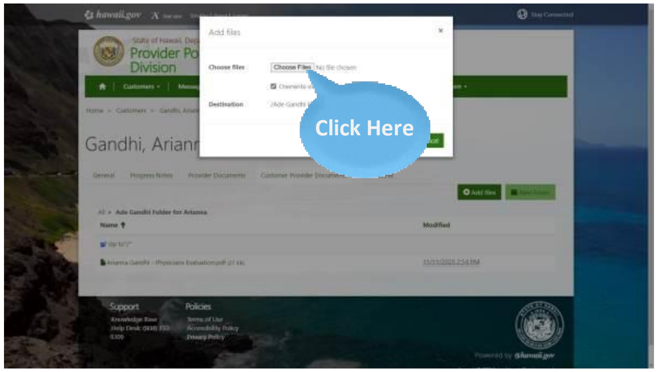
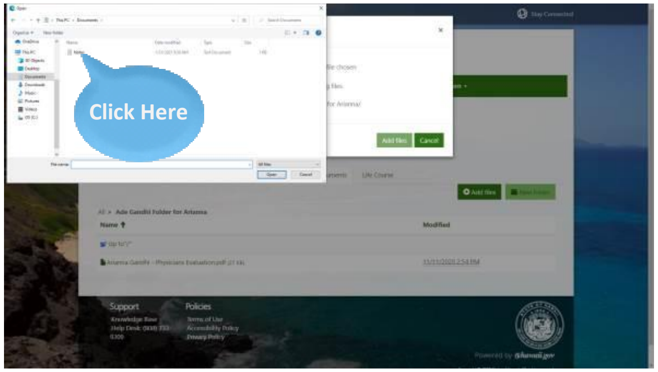
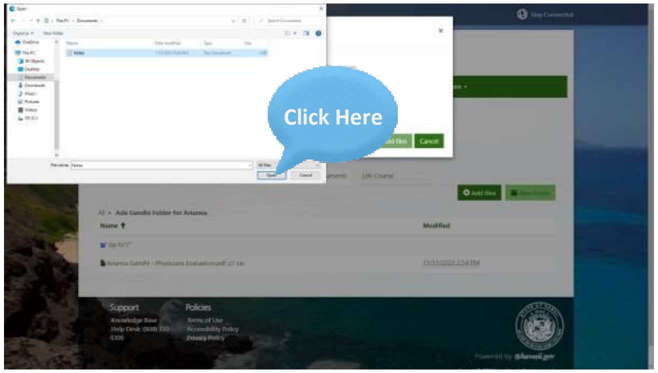
	6. Click to scroll.	Here, you can see any information documented at the ISP meeting, such as who the customer is, legal issues, and services they are receiving.
	7. Click to scroll.	You can also review the action plan for the customer, which includes goals, provider plans, individual budgets, plan services, and service authorizations.
	8. Click to scroll.	In the Monitoring ISP section, you can get a clear view of the customer's goals, outcomes, and plan services.

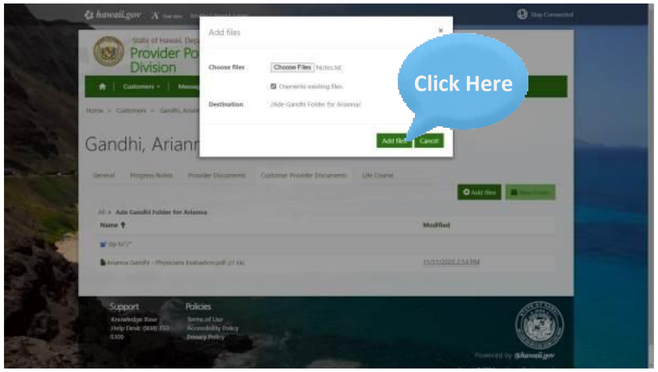
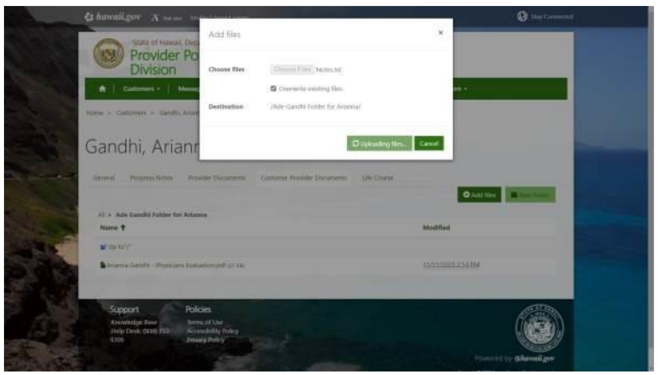
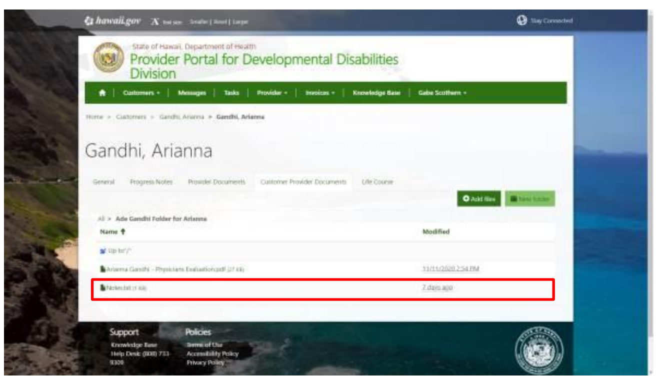
	9. Click to scroll.	Any additional notes can be found here. Return to the top of the page.
	10. Click **Customers**.	You can view service authorizations for a customer from the customer's record.
	11. Click **Gandhi, Arianna**.	

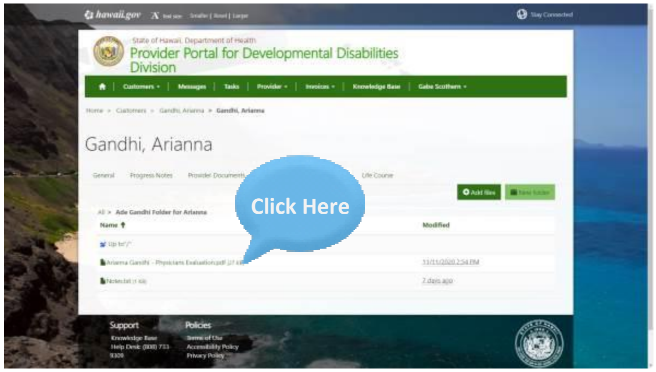
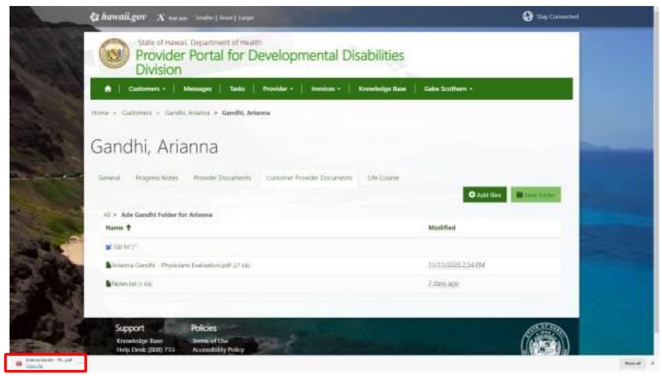
	12. Click to scroll.	Scroll down to the Service Authorizations section.
	13. Click to scroll.	Here, you can see a list of service authorizations that have been submitted for the customer, with the DDD start and end dates, units, and cost for each. This does not necessarily reflect Medicaid Online Status.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

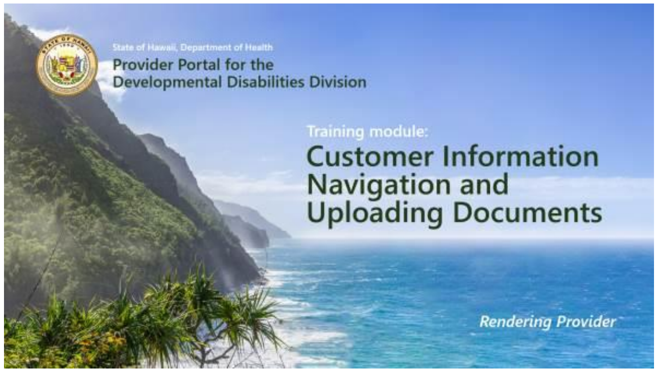
Upload documents related to the customer	Click Instructions	Talking Points
	1. Click to continue.	Next, let's see how to upload documents related to the customer.
	2. Click **Provider Documents**.	Using the tabs at the top of the customer profile, you can view documents uploaded by other providers and add supporting documents of your own. First, click the **Provider Documents** tab.

	3. Click **Customer Provider Documents**.	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. Next, click the **Customer Provider Documents** tab.
	4. Click **Ade Gandhi Folder for Arianna**.	This tab is where you can access documents shared only between you and DDD. Other providers cannot see the information on this tab. To upload a new document to an existing folder, click the name of the folder and then click **Add files**.
	5. Click **Add files**.	

	6. Click **Choose Files**.	Next, click **Choose Files** and open the file you want to upload.
	7. Click **Notes**.	
	8. Click **Open**.	

	9. Click **Add files**.	Now add the files.
	10.	
	11.	The file now appears in the list.

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

Conclusion	Click Instructions	Talking Points
		This training module is now complete. Thanks for watching.