

# ENTERING INDIVIDUAL PLANS AND QUARTERLY REPORTS

*IN THE PROVIDER PORTAL*



JUNE 23, 2026

# AGENDA

**01**

## Homepage

Orientation to the Homepage

**03**

## Quarterly Report

Entering details to complete a Quarterly Report

**02**

## Individual Plan (IP)

Entering details to complete an Individual Plan

**04**

## Access to the Provider Portal

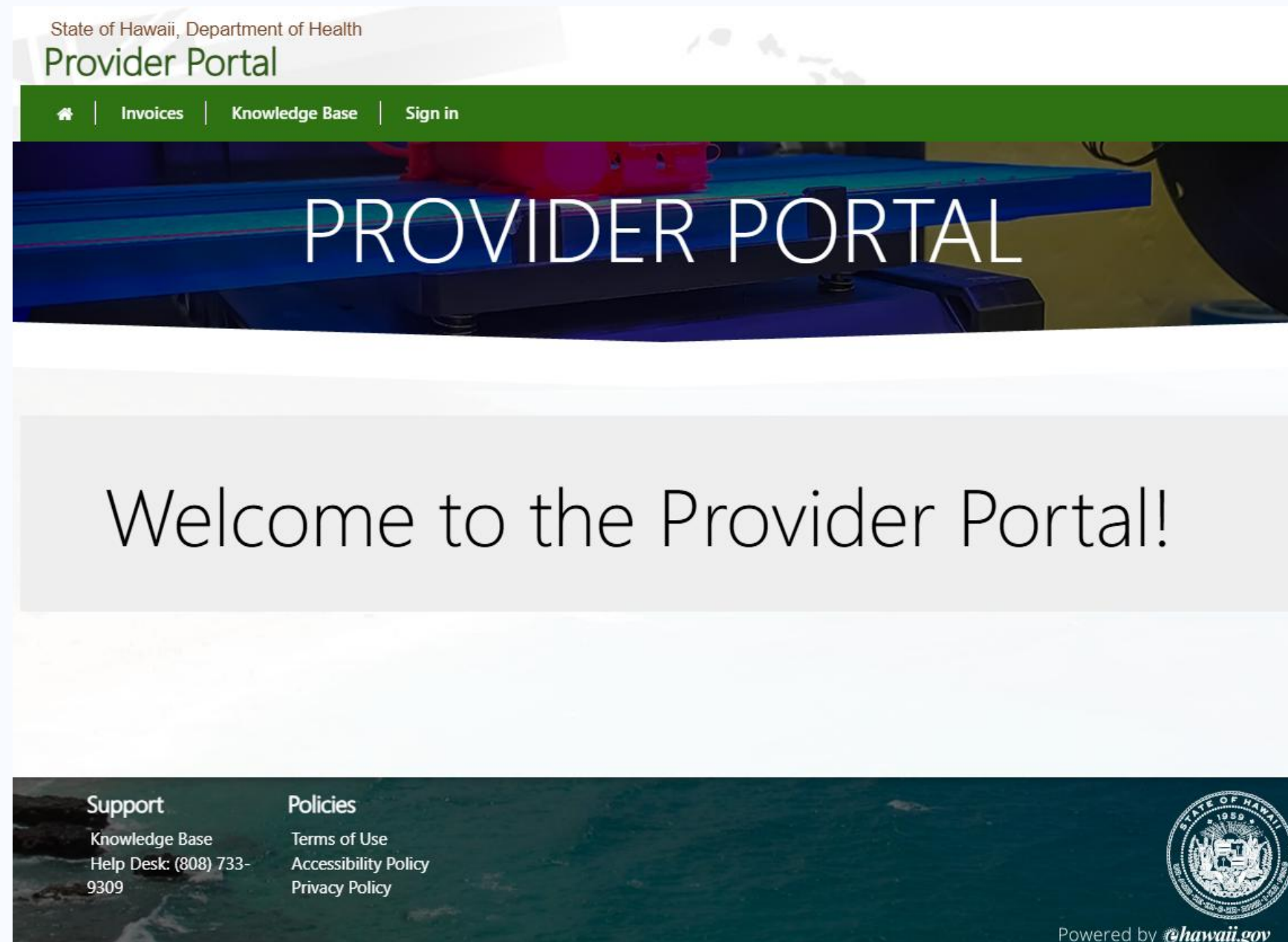
How to get access to the Provider Portal

# PHASE IN OF INDIVIDUAL PLANS AND QUARTERLY REPORTS

- ❖ If the participant's Individualized Service Plan (ISP) meeting is **7/1/26** and after, complete the IP and Quarterly Reports in the Provider Portal

# LOGIN

<https://bhapro.dynamics365portals.us/>



State of Hawaii, Department of Health  
Provider Portal


Home | Invoices | Knowledge Base | Sign in

## PROVIDER PORTAL

Welcome to the Provider Portal!

**Support**  
Knowledge Base  
Help Desk: (808) 733-9309

**Policies**  
Terms of Use  
Accessibility Policy  
Privacy Policy

Powered by  @hawaii.gov

# HOMEPAGE

- ❖ IPs that are due in the next 7 days
- ❖ IPs needing revision

Possibilities NOW! State of Hawaii, Department of Health  
Provider Portal for Developmental Disabilities Division

Customers | Messages | Tasks | Provider | Invoices | Knowledge Base | Shannon Tsubaki

### DDD Fake Agency for Testing

Incomplete AERs					
Name ↑	Primary AER Type	Event Location	Date of Verbal	Created On ↓	Status Reason
There are no records to display.					

IPs Due In Next 7 Days				
Name	IP Detailed Strategies Due	Date of Submission	Rendering Provider	Service
There are no records to display.				

IPs Needing Revision				
Name	IP Detailed Strategies Due	Date of Submission	Rendering Provider	Service
There are no records to display.				

# INDIVIDUAL PLAN (IP)

- ❖ Following the ISP meeting, the Case Manager will enter the goals, outcomes, action steps, and risks in INSPIRE
- ❖ The Case Manager also enters in the Rendering Provider to tie the plan to a specific Service Supervisor
- ❖ Shell IPs are generated from the Case Manager
- ❖ IPs ready for providers to complete, will be displayed in Provider Plans

Home > Customers > Provider Plans

## Provider Plans

### Unassigned IPs

Name	IP Detailed Strategies Due	Date of Submission	Rendering Provider	Service
There are no records to display.				

My IPs Ready For Strategies

Name	IP Detailed Strategies Due ↑	Date of Submission	Rendering Provider	Service
There are no records to display.				

# INDIVIDUAL PLAN (IP)

Home > Customers > Provider Plans > 41309Test', Ok'ina > 41309Test', Ok'ina: Provider Plan

## 41309Test', Ok'ina: Provider Plan

**General**

**Provider**

**Rendering Provider**

**Date of Plan**

M/D/YYYY

**Service Start Date**

11/4/2025

**Service End Date**

11/3/2026

Date of Plan = Date the plan is being drafted

Rendering Provider: Service Supervisor completing the report

# Selecting Rendering Provider

Lookup records ×

camden 🔍

Choose one record and click Select to continue

✓	Name	Provider	Position ↑	Primary Island	Secondary Island	Service Start Date	Employee Status	Status Reason	Hired Date	Modified By	Modified On
<input type="checkbox"/>	Camden Lam	Advantage Health Care Provider						Draft		Taylor Allen.consult	12/19/2025 9:22 AM

Select Cancel Remove value

# INDIVIDUAL PLAN (IP)

<b>Date of Submission</b> 11/4/2025 9:17 AM	<b>Status Reason</b> In Progress
<b>IP Submission Date</b> M/D/YYYY	<b>Telehealth Supervision Allowed</b> <input checked="" type="radio"/> No <input type="radio"/> Yes
<b>IP Revision Date</b> M/D/YYYY	<b>Supervision Frequency</b> Monthly
<b>IP Approval Date</b> M/D/YYYY	

- ❖ Select "No" or "Yes" to indicate if Telehealth Supervision is allowed per the ISP
- ❖ Complete the Supervision Frequency field based on the ISP

# INDIVIDUAL PLAN (IP)

<b>DSP Training on IP</b> <input type="text"/>	<b>Case Manager Comments</b> —
<b>Duration and Frequency of Service</b> <input type="text"/>	

- ❖ Providers do not need to submit evidence of DSW training on IPs, unless a DSW started mid plan year.
- ❖ Enter Duration and Frequency of the service as listed in the ISP.
- ❖ If the IP is sent back for revisions, Case Manager's comments for these fields will be displayed here

# VISUAL OF IP CONTENT



# ENTERING OUTCOME DETAILS

Outcome \*

Outcome Continuity

Risk Mitigation

Provider Plan Strategy Details

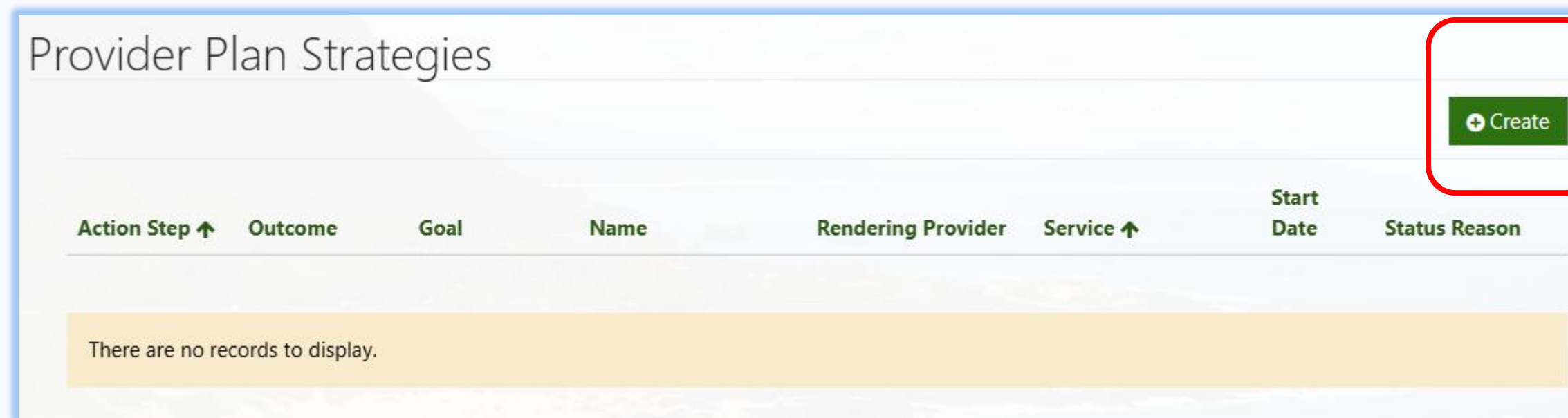
Create

Name ↑	Provider Plan	Outcome	Action Step	Method	Measurement	Created On
There are no records to display.						

Back Save

- ❖ Choose the outcome
- ❖ For each outcome complete fields for:
  - Outcome Continuity
  - Risk Mitigation

# ENTERING METHODS AND MEASUREMENTS



Provider Plan Strategies

+ Create

Action Step ↑	Outcome	Goal	Name	Rendering Provider	Service ↑	Start Date	Status Reason
---------------	---------	------	------	--------------------	-----------	------------	---------------

There are no records to display.

- ❖ When starting a new IP, you will not see anything listed here.
- ❖ To add in new method and measurements for an Action Step, click + create

# ENTERING METHODS AND MEASUREMENTS

Provider Plan Strategies

Create

Action Step ↑	Outcome	Goal	Name	Rendering Provider	Service ↑	Start Date	Status Reason
Test outcome	Test objective	Test Goal	Strat A		ADULT DAY HEALTH TIER 2	9/22/2024	In Progress

Save as Draft

View details  
Edit

- ❖ When returning to a draft, your work will be displayed here
- ❖ To make edits to a method, measurement, risk mitigation or outcome continuity sections, click on "Edit"

# ENTERING METHODS AND MEASUREMENTS

- ❖ Choose the Action Step you would like to add method and measurement details for

Start Date  
10/11/2026

End Date  
10/10/2027

Outcome \*  
test outcome

Goal  
test goal

Status Reason  
In Progress

Case Manage

Outcome Cor

Strategy \*

Risk Mitigati

Provider Plan Strategy Details

Create

Create

Customer  
DDDTest, DEV

Outcome  
test outcome

Action Step

Measurement

Method

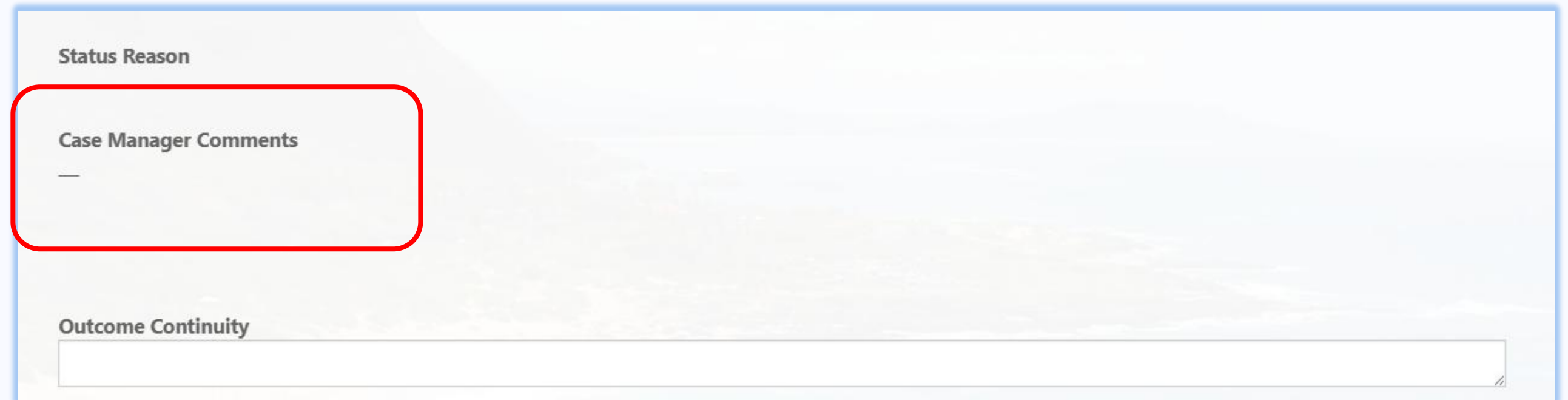
Provider Plan  
DDDTest, DEV - IP - Bayada Home Care

Provider Plan Strategy  
—

Service Plan  
DDDTest, DEV&#160;- ISP - 10/12/2026 - 10/11/2027

# ENTERING METHODS AND MEASUREMENTS

- ❖ If the IP is sent back for revisions, Case Manager's comments for these fields will be displayed here



The screenshot shows a form with a light blue background and a white border. It contains three main sections: 'Status Reason' at the top, 'Case Manager Comments' in the middle, and 'Outcome Continuity' at the bottom. The 'Case Manager Comments' field is highlighted with a red rounded rectangle. The 'Outcome Continuity' field is a large empty text box.

Status Reason

Case Manager Comments

Outcome Continuity

# ATTACHING DOCUMENTS TO THE IP

The screenshot shows the 'Provider Portal for Developmental Disabilities Division' interface. The breadcrumb trail is 'Home > Customers > DDDTest, DEV > DDDTest, DEV'. The 'Customer Provider Documents' tab is selected and highlighted with a red box. Below the tabs, there are 'Add files' and 'New folder' buttons. A table lists folders with columns for 'Name' and 'Modified'. The 'IP' folder is highlighted with a red box and a mouse cursor. The table data is as follows:

Name	Modified
AERs	8 months ago
IP	8 months ago
Miscellaneous	8 months ago
Provider Monitoring	8 months ago

- ❖ To attach a document to the IP, navigate to the Customer tab
- ❖ Select the participant
- ❖ Click on Customer Provider Documents
- ❖ Click on IP folder
- ❖ Upload the document to the folder titled with the year and service type

# SUBMITTING THE IP

- ❖ To submit the IP, use the mouse to sign

The screenshot shows a web form titled "Provider Approval". It contains several input fields: "Approved By \*" (a text box with a search icon), "Provider Signature" (a large empty text box highlighted with a red rounded rectangle), "Provider Status \*" (a dropdown menu currently showing "Submitted"), and "Provider Approved Date \*" (a date picker showing "6/22/2026"). There is also a "Clear" button below the signature field.

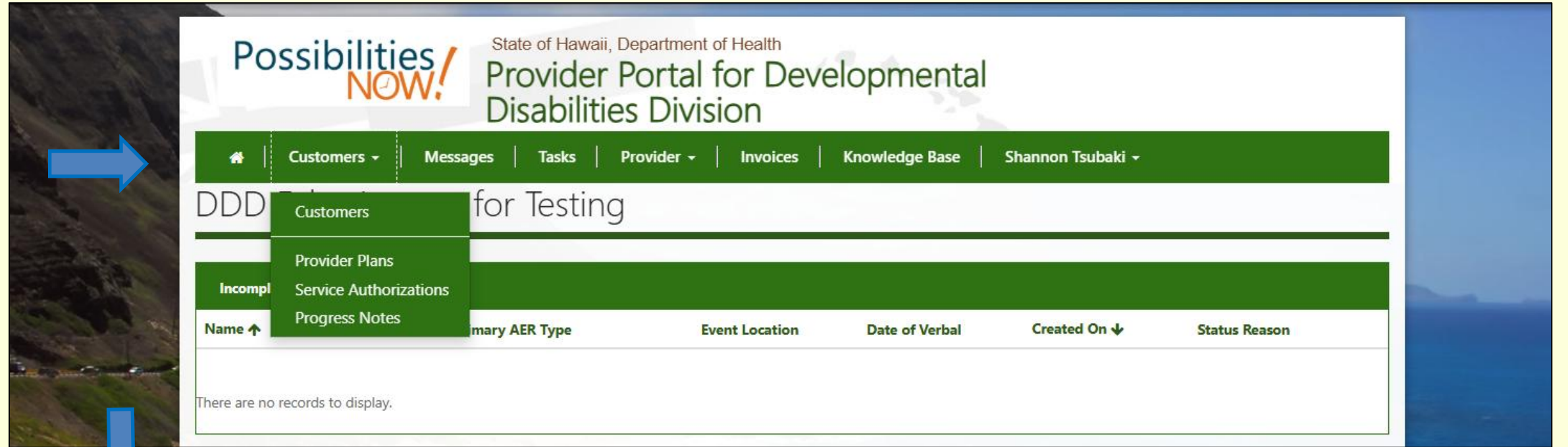
# LOCATING IPS

- ❖ To locate a list of IPs and their status for a participant, navigate to the Customers tab, select the participant:
  - ❖ In progress
  - ❖ Approved

Individual Plans				
Provider Plans				
Date of Submission ↓	Provider	Service	Plan Approved Date	Status Reason
6/2/2026 9:28 AM	Bayada Home Care	ADULT DAY HEALTH 1:1		Approved
6/2/2026 9:28 AM	Bayada Home Care	ADULT DAY HEALTH 1:1		In Progress
3/9/2026 1:40 PM	Bayada Home Care	ADULT DAY HEALTH 1:1		In Progress
3/9/2026 1:40 PM	Bayada Home Care	ADULT DAY HEALTH 1:1		In Progress

# QUARTERLY REPORTS

- To find a Quarterly Report click on the Customers tab.
- Find their name listed or run a search.
- Scroll to the bottom to find Quarterly Reports that are ready to be worked on.

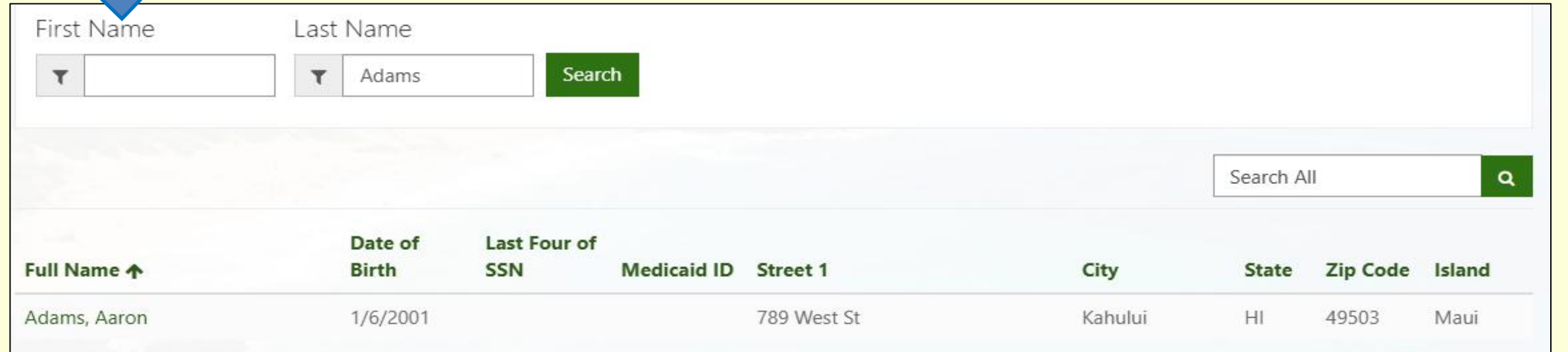


Possibilities NOW! State of Hawaii, Department of Health  
 Provider Portal for Developmental Disabilities Division

Customers Messages Tasks Provider Invoices Knowledge Base Shannon Tsubaki

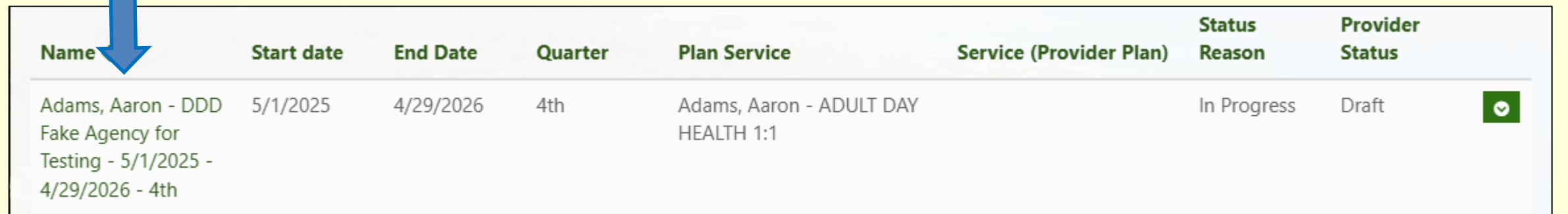
Customers  
 Provider Plans  
 Service Authorizations  
 Progress Notes

Name	Primary AER Type	Event Location	Date of Verbal	Created On	Status Reason
There are no records to display.					



First Name Last Name  
 Search Search All

Full Name	Date of Birth	Last Four of SSN	Medicaid ID	Street 1	City	State	Zip Code	Island
Adams, Aaron	1/6/2001			789 West St	Kahului	HI	49503	Maui



Name	Start date	End Date	Quarter	Plan Service	Service (Provider Plan)	Status Reason	Provider Status
Adams, Aaron - DDD Fake Agency for Testing - 5/1/2025 - 4/29/2026 - 4th	5/1/2025	4/29/2026	4th	Adams, Aaron - ADULT DAY HEALTH 1:1		In Progress	Draft

# QUARTERLY REPORTS

The screenshot displays the 'Provider Portal for Developmental Disabilities Division' for the user 'Shannon Tsuzaki'. The page title is 'DDD Fake Agency for Testing'. It features several sections for report management:

- Incomplete AERs:** A table with columns: Name, Primary AER Type, Event Location, Date of Verbal, Created On, Status Reason. It shows 'There are no records to display.'
- IPs Due in Next 7 Days:** A table with columns: Name, IP Detailed Strategies Due, Date of Submission, Rendering Provider, Service. It shows 'There are no records to display.'
- IPs Needing Revision:** A table with columns: Name, IP Detailed Strategies Due, Date of Submission, Rendering Provider, Service. It shows 'There are no records to display.'
- Quarterly Reports Due in Next 7 days:** A table with columns: Name (Provider Plan), Provider, Due Date, Quarter, Service Supervisor, Plan Service, Service (Provider Plan). It shows 'There are no records to display.'
- Quarterly Reports Needing Revision:** A table with columns: Name (Provider Plan), Provider, Revision Due Date, Quarter, Service Supervisor, Plan Service, Service (Provider Plan). It contains one record:

Name (Provider Plan)	Provider	Revision Due Date	Quarter	Service Supervisor	Plan Service	Service (Provider Plan)
Adams, Aaron - IP - DDD Fake Agency for Testing	DDD Fake Agency for Testing	4/22/2025	1st	Adams, Aaron	ADULT DAY HEALTH 1:1	

A red box highlights the 'Quarterly Reports Needing Revision' table, and a red arrow points to the 'Name (Provider Plan)' column header.

The Homepage will list reports that are due in the Next 7 Days and reports that need revision. Click to open the report you wish to work on.

Quarterly Report Edit | Customer Details | Progress Notes | Documents | Life Course

**General**

**Quarter**  
 1st

**Plan Service**  
 Adams, Aaron - ADULT DAY HEALTH 1:1

**Service Plan**  
 Adams, Aaron - ISP - 5/1/2025 - 4/29/2026

**Provider Plan**  
 Adams, Aaron - IP - DDD Fake Agency for Testing

**Case Manager Comments**  
 —

**Rendering Provider ( Rendering Provider = Service Supervisor)**  
 [Search Field]


**Date of Submission**  
 4/10/2025

**Date of Completion**  
 —

**Revision Due Date**  
 4/22/2025

**Provider Status**  
 Submitted

**Status Reason**  
 Needs Revision

  
 Go to Top

Here you will fill in all blank fields.  
 For instructions you can hover over each item or refer to the Instructions manual.

Quarterly Report – Visual (Print out from Provider Portal)

Quarterly Report Template			
<b>Title</b>	Quarterly Review (QR) Report – Quarter 1	<b>Provider</b>	OHS, LLC
<b>Participant Name</b>	Participant	<b>Service Supervisor</b>	Boyd Brown
<b>Plan Year</b>	12/1/2025 – 11/30/2026	<b>Service</b>	CLS-I
<b>Review Date</b>	March 5, 2026	<b>Review Period</b>	Q1 (December 1, 2025 – February 29, 2026)
<b>Goal</b>	I want to have more friends and be part of different clubs in my community.		
<b>Outcome</b>	I will enjoy my free time by participating in a local group or club and make a new friend who shares my interest and who I can share my love of this hobby with.		
<b>Risk Mitigation</b>	Staff will reduce social and emotional risks by gradually introducing activities, limiting choices to prevent overwhelm, and providing direct support during initial meetings. Staff will monitor the participant for signs of anxiety, withdrawal, or distress and will pause or modify activities as needed. Role-play and visual previews will be used in advance to prepare for social interactions and expectations. Staff will remain nearby during early participation to ensure safety and appropriate behavior, fading support as confidence increases. Staff will reinforce safe social boundaries, including appropriate sharing of personal information, and will follow any applicable Behavior Support Plan strategies if anxiety or behavioral concerns arise.		
<b>Action Step</b>	<b>Method</b>	<b>Measurement</b>	
<b>Choose 1 – 2 hobbies that I am genuinely interested in, to help identify my interests.</b>	Within 3 calendar months, Pt will complete an interest inventory delivered by provider to identify interests. This will involve meeting with Pt weekly for a brief activity to explore hobbies: staff will prepare pictures, videos or examples of different hobbies and discuss them with participant. After exploring options, staff will ask participant which 1-2 activities they liked most.	Pt will independently choose at least 1-2 hobby interests from the inventory that they will then use to complete action step 2. This action step is achieved when participant can name two specific hobbies or activities they are interested in pursuing.	
<b>Progress Summary</b>	Pt participated in all scheduled sessions and responded positively to the format. Pt showed enthusiasm when discussing certain topics and was able to express preferences with minimal prompting		
<b>Data Summary</b>	12 sessions completed. Pt identified 2 preferred hobbies (military history reenactments and volunteering with animals) by week 10.		
<b>What's working/not working</b>	Pt occasionally had difficulty focusing when sessions were held later in the day. He was more engaged during morning sessions.		
<b>Recommendations</b>	Continue weekly interest exploration in the morning. Begin planning next action step based on identified interests. Consider incorporating hobby-related outings or trial activities in Q2.		

- Documents Uploaded
- Here you can find uploaded documents and add new files

Documentation Uploaded [link](#)

## Adams, Aaron

General Progress Notes Provider Documents **Customer Provider Documents** Life Course

+ Add files

New folder

Name ↑

Modified

📁 AERs

1/22/2024 7:27 AM

📁 IP

1/22/2024 7:27 AM

📁 Miscellaneous

1/22/2024 7:27 AM

📁 Provider Monitoring

1/22/2024 7:27 AM

- Save Draft / Save and Finalize can be found at the bottom left of the page.

Save as Draft

Save and Finalize

# SERVICE SUPERVISOR ACCESS TO THE PROVIDER PORTAL

[doh.dddproviderhelpdesk@doh.hawaii.gov](mailto:doh.dddproviderhelpdesk@doh.hawaii.gov)

Developmental Disabilities Division  
**Provider Portal**  
Request User Account or Change Form

This form is used to request a user account or to change information for an existing user account for the Provider Portal. The DDD will create the following types of accounts for Providers:

- 1) **Administrators:** Each provider agency will be limited to two (2) **Administrator** level accounts. Administrators should be provider staff who are authorized and responsible for overseeing operations of the agency. Responsibilities in the Provider Portal will include, but is not limited to, ensuring agency contact information is updated, ensuring rendering provider (employee or independent contractor) information is current, submitting requests to the DDD to add or change Provider Portal user accounts, and deactivating user accounts once a rendering provider leaves the agency.
- 2) **Users:** Users should be limited to provider staff who are responsible for tasks such as creating or managing Individual Plans (IP), creating and submitting Quarterly Reports, and reviewing, completing and submitting Adverse Event Reports (AER).

Please type responses and submit completed form by email to:  
[doh.dddproviderhelpdesk@doh.hawaii.gov](mailto:doh.dddproviderhelpdesk@doh.hawaii.gov)

Providers will be notified by email once DDD has completed the request or change.

# TIPS FOR USING THE PROVIDER PORTAL

- ❖ Recommended Browser: Chrome
- ❖ Help Desk: (808) 733-9309

**THANK YOU**

[doh.ddd.crb@doh.hawaii.gov](mailto:doh.ddd.crb@doh.hawaii.gov)