



AR Developmental Disabilities Services Incident Management Provider Portal User Guide

Division of Disability Services

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1 Introduction

1.1 Overview

The ***AR Developmental Disabilities Services Incident Reporting Provider Portal*** facilitates the creation and management of incident reports, which are submitted from Providers. From submitted reports, Providers may submit follow-up actions or view findings from each incident.

1.2 Features

1.2.1. Accessibility

The ***AR Developmental Disabilities Services Incident Reporting Provider Portal*** module shall ensure quality services and comply with the Americans with Disabilities Act of 1990.

2 About This Guide

2.1 Who Should Use This Document?

This guide is intended for the following groups:

- DHS Providers

2.2 Prerequisite Knowledge

Using the **AR Developmental Disabilities Services Incident Reporting Provider Portal** module and guide assumes that the user has the following prerequisite knowledge:

- Using a Tablet PC, Laptop, or standard desktop computer
- Internet connectivity with one of the following browsers:
 - o Google Chrome
 - o Edge

2.3 Common User Interface Elements

2.3.1 Drop-down Lists

A drop-down list allows the user to choose information from a predetermined list that “drops down” when activated. To select an item, move the mouse pointer to the appropriate item in the list and click it.

A screenshot of a web form element. At the top, the label "State" is followed by a red asterisk, indicating it is a required field. Below the label is a drop-down menu. The menu is currently open, showing a list of options. The first option is "Arkansas", which is highlighted. Below it is a separator line, followed by the text "---None---". Below that are the options "Alabama" and "Alaska". A vertical scrollbar is visible on the right side of the list.

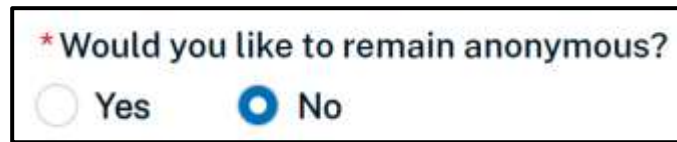
2.3.2 Text Boxes

Text boxes are used to record variable information, and may be either numeric or alpha-numeric, depending on the information being requested. To enter information, tab to or click into the text box and type in the data.

A screenshot of a web form element. It consists of a label "Organization" in a bold, dark font. Below the label is a large, empty rectangular text box with a thin border.

2.3.3 Radio Buttons

Radio buttons can be selected or deselected and may be used to indicate information is true or false. The radio button may also populate additional fields that are conditionally mandatory on the selection.

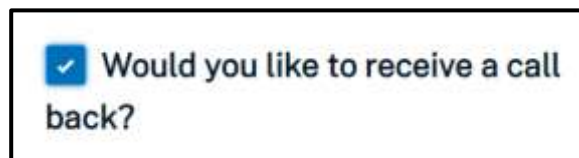


* Would you like to remain anonymous?

☐ Yes ☒ No

2.3.4 Checkboxes

Checkboxes can only be checked or unchecked and may be used to indicate information is true or to be included, depending on the information being requested. To check or uncheck a box, move the mouse pointer to the checkbox on the screen and select it.



☒ Would you like to receive a call back?

2.3.5 Required Fields

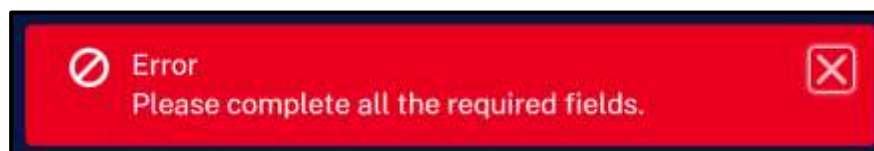
Required Field text is indicated by the "*" icon before the field name, which guides the user to enter data into the field.



* First Name

2.3.6 Error Messages

Error messages serve as a prompt for the user to validate a field.



Error
Please complete all the required fields.

2.3.7 Help Text

Help text is indicated by the "i" icon, which guides the user on what a particular field requires.



Which Agency did you notify of the incident?

dent  * Notificati

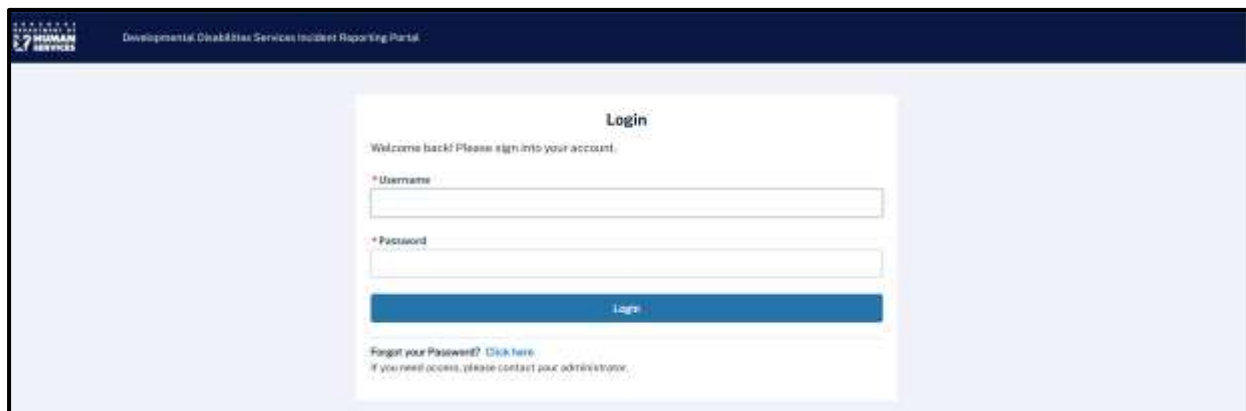
3 Login Page

3.1. Overview

The Login Page is the landing page when the Provider Portal is accessed. This page can be reached by anyone who has the URL of the **AR Developmental Disabilities Services Incident Reporting Provider Portal** module.

Provider Portal Link (This link used to go to the Provider Portal)

3.1.1. Screenshot



3.1.1.1. Controls & User Actions

The following table details the controls that are present in the Login Page. Each control and user action includes a description and control type. Each user action includes a description.

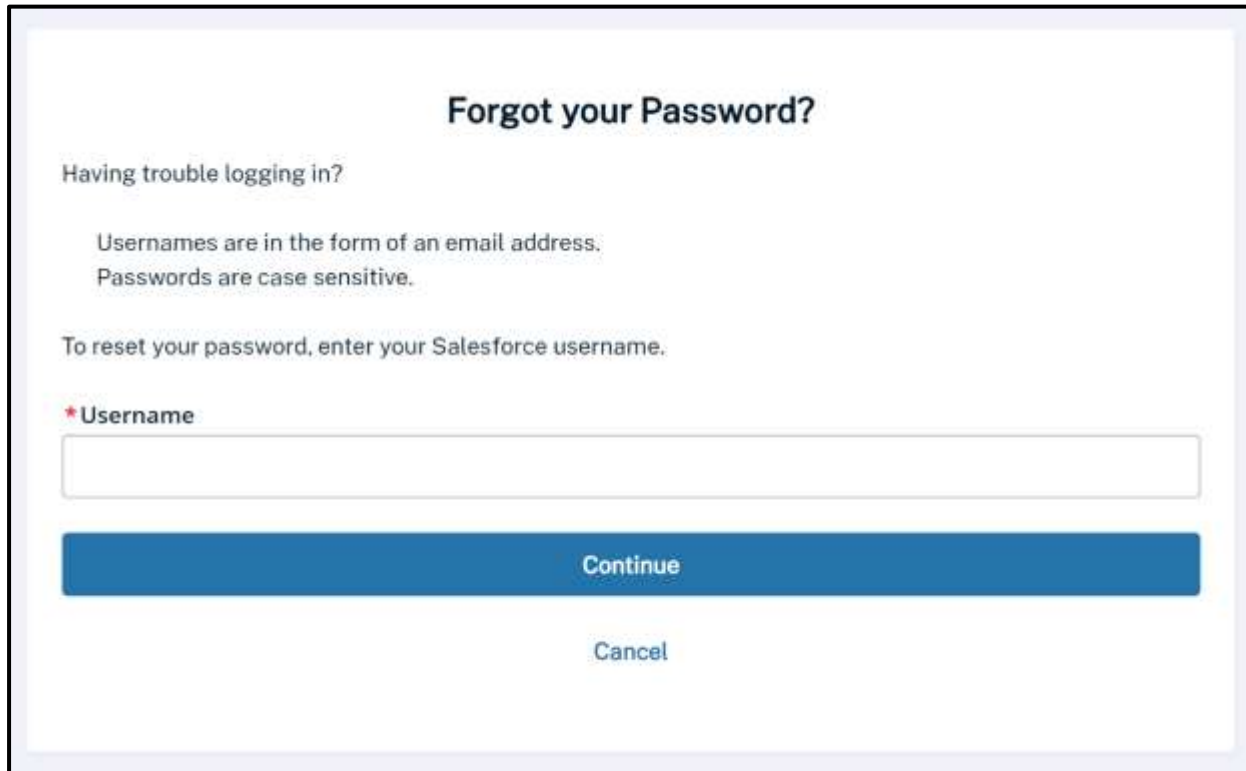
Control	Description	Control Type
Username	Click in the textbox field to enter the username.	Mandatory
Password	Click in the textbox field to enter the password.	Mandatory
Login	Click the 'Login' button to be directed to the Provider Portal homepage.	Always Enabled
Forgot Your Password?	Click the 'Click here' hyperlink to be redirected to the Password Reset Page.	Hyperlink
User Actions	Description	
Login	Click the 'Login' button after entering the username and password into the respective text boxes.	

4 Forgot Password

4.2. Overview

The Forgot Password function can be found on the Login Page of the **AR Developmental Disabilities Services Incident Reporting Provider Portal**.

4.2.1. Screenshot



The screenshot shows a web form titled "Forgot your Password?". Below the title, it says "Having trouble logging in?". There are two lines of instructional text: "Usernames are in the form of an email address." and "Passwords are case sensitive.". Below this, it says "To reset your password, enter your Salesforce username.". There is a red asterisk followed by the label "Username" above a text input field. Below the input field are two buttons: a blue "Continue" button and a grey "Cancel" button.

4.2.1.1. Controls & User Actions

The following table details the controls that are present in the Login Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Username	Click in the textbox field to enter the username.	Mandatory
Continue	Click the 'Continue' button to be directed to the Answer Your Security Question page.	Always Enabled
Cancel	Click the 'Cancel' button to cancel the password reset function.	Button
Answer	Click in the textbox field to enter the answer to the security question.	Mandatory
Back to login	Hyperlink that redirects the user to the home login page.	Hyperlink
User Actions	Description	

Reset Password	Click the 'Click Here' button if the account password is forgotten. The user will enter their username, click the 'Reset Password' hyperlink, and then be redirected to further instructions.
----------------	---

5 Homepage

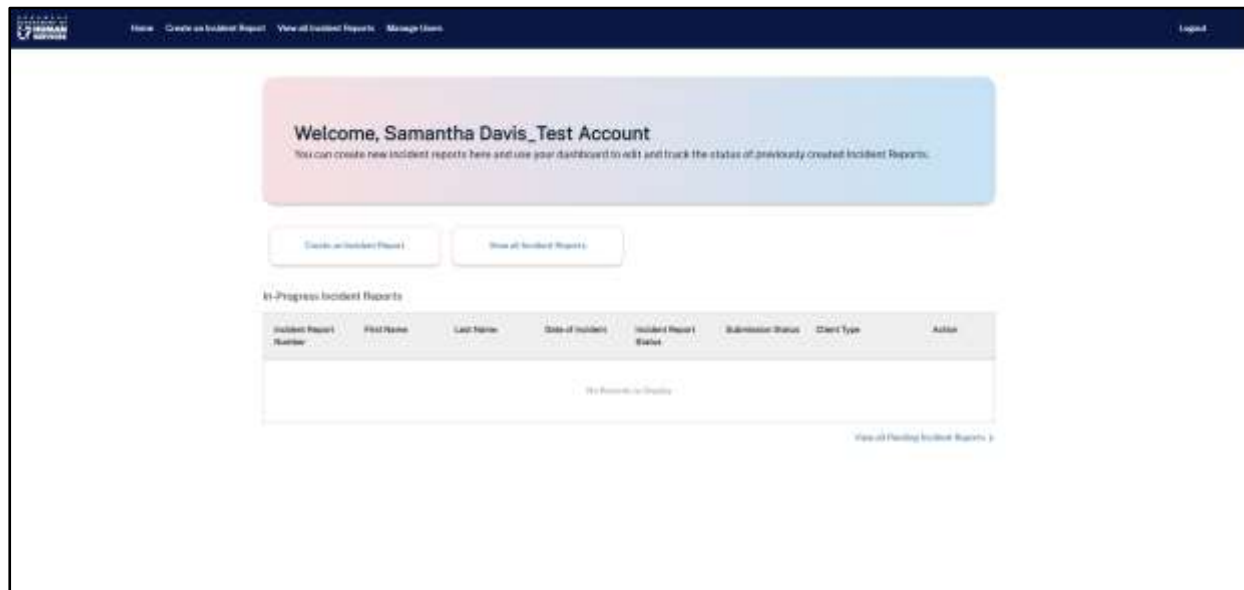
5.1 Overview

The homepage is the landing page when the user successfully accesses the **AR Developmental Disabilities Services Incident Reporting Provider Portal**. This page can be reached by anyone who has the portal URL.

The homepage consists of the following:

- Top Navigation Bar and Header
- Logout
- Provider Welcome Message
- Incident Report Action Buttons
- In-Progress Incident Reports Table
- Footer

Screenshot



5.1.1.1 Controls & User Actions

The following table details the modules that are present on the **AR Developmental Disabilities Services Incident Reporting Provider Portal** homepage. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Home	Refreshes the page and navigates to the homepage.	Hyperlink
Create an Incident Report	Navigates to the first section of the incident report creation module.	Hyperlink

View all Incident Reports	Navigates to a list view page of all incident reports the user has created or currently has in progress.	Hyperlink
Manage Users	Navigates to the list view page of all Provider Contact names and details.	Hyperlink
Logout	Logs the user out of their account and navigate them back to the login page.	Hyperlink
Dashboard	Displays a welcome message and header for the In-Progress Incident Reports table.	Always Enabled
In-Progress Incident Reports	Displays all incident report records and details the user currently has in-progress, including Incident Report Number, First Name, Last Name, Date of Incident, Incident Report Status, Submission Status, Client Type, and Action.	Always Enabled
View	Displays the corresponding in-progress incident report.	Hyperlink
View all Pending Incident Reports	Navigates the user to a list view page of all pending incident reports the user has created or currently has pending.	Hyperlink
Footer	Displays various hyperlinks for privacy policy, alerts, security policy, acceptable use, and transparency that redirect the user to State of Arkansas websites.	Always Enabled
User Actions	Description	
Create an Incident Report	Click the 'Create an Incident Report' button to open the first section of the incident report creation module.	
View all Incident Reports	Click the 'View all Incident Reports' button to view all incident reports the user has created or currently has in progress.	

6 Create an Incident Report

6.1 Submitter Information

The Submitter Information section of the incident report is mandatory. The submitter must complete fields for contact and personal identification information about themselves.

6.1.1 Screenshot

The screenshot shows a web form titled "Report an Incident". On the left is a sidebar with a list of steps: "Submitter Information" (selected), "Injured Person", "Alleged Perpetrator Information", "Incident Details", "Provider/PASSE Information", "Medical Attention Required", "Notifications After Incident", "Other Persons Involved", and "Review and Submit Incident Report". The main content area is titled "Submitter Information" and contains the following fields:

- * Relationship to Injured Person: A dropdown menu with "Select an Option".
- * First Name, Middle Name, * Last Name: Three text input fields.
- Organization: A text input field.
- * Address Line 1: A text input field.
- Address Line 2: A text input field.
- * City, * State (dropdown with "Select an Option"), * Zip Code: Three text input fields.
- County: A dropdown menu with "Select an Option".
- * Phone Number, Email: Two text input fields.
- Would you like to receive a call back?: A checkbox.
- Is it OK to leave a message?: A checkbox.

At the bottom left is a "Previous" button. At the bottom right are "Save" and "Next" buttons.

6.1.1.1 Controls & User Actions

The following table details the controls that are present through the Submitter Information section. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Relationship to Injured Person	Click the dropdown arrow to select the reporter's relationship to the injured person.	Mandatory

First Name	Click in the textbox field to enter the reporter's first name.	Conditionally Mandatory
Middle Name	Click in the textbox field to enter the reporter's middle name.	Not Mandatory
Last Name	Click in the textbox field to enter the reporter's last name.	Conditionally Mandatory
Organization	Click in the textbox field to enter the reporter's organization affiliation.	Not Mandatory
Address Line 1	Click in the textbox field to enter the reporter's Address Line 1.	Conditionally Mandatory
Address Line 2	Click in the textbox field to enter the reporter's Address Line 2.	Not Mandatory
City	Click in the textbox field to enter the reporter's city.	Conditionally Mandatory
State	Click the dropdown arrow to select the reporter's state.	Conditionally Mandatory
Zip Code	Click in the textbox field to enter the reporter's zip code.	Conditionally Mandatory
County	Click the dropdown arrow to select the reporter's county.	Conditionally Mandatory
Phone Number	Click in the textbox field to enter the reporter's phone number.	Conditionally Mandatory
Email	Click in the textbox field to enter the reporter's email address.	Not Mandatory
Would you like to receive a call back?	Click the checkbox if electing to give permission to receive a call back.	Not Mandatory
Is it OK to leave a message?	Click the checkbox if it is OK to leave a message if the reporter does not answer the phone.	Not Mandatory
User Actions	Description	
Save	Click the 'Save' button to save the completed information and remain on the page.	
Previous	Click the 'Previous' button to return to the previous section. This button is disabled on the Reporter Information section.	
Next	Click the 'Next' button to advance to the next section.	
Back to Home	Click the 'Back to Home' button to leave the incident report and return to the homepage.	

6.2 Injured Person

The Injured Person section of the incident report is mandatory. This section contains fields for contact and personal identification information about the injured person.

6.2.1 Screenshot

The screenshot shows a web form titled "Injured Person" with a sidebar on the left containing a navigation menu. The sidebar has a vertical list of items: "Submitter Information" (checked), "Injured Person" (selected), "Alleged Perpetrator Information", "Incident Details", "Provider/PASSE Information", "Medical Attention Required", "Notifications After Incident", "Other Persons Involved", and "Review and Submit Incident Report". The main form area contains the following fields:

- * Client Type: A dropdown menu with "Select an Option".
- * First Name: A text input field.
- Middle Name: A text input field.
- * Last Name: A text input field.
- * Date of Birth: A date picker.
- Age: A text input field.
- * Gender: A dropdown menu with "Select an Option".
- * Race: A dropdown menu with "Select an Option".
- * Ethnicity: A dropdown menu with "Select an Option".
- * Legal Status: A dropdown menu with "Select an Option".
- * Address Line 1: A text input field.
- Address Line 2: A text input field.
- * City: A text input field.
- * State: A dropdown menu with "Select an Option".
- * Zip Code: A text input field.
- * County: A dropdown menu with "Select an Option".
- Phone Number: A text input field.
- Mobile Phone Number: A text input field.
- Alternate Phone Number: A text input field.
- Email: A text input field.
- IRIS Number: A text input field.
- * Medicaid: A text input field.
- PASSE MEMBER ID#: A text input field.
- Contact Preference: A dropdown menu with "Select an Option".

At the bottom of the form, there are two buttons: "< Previous" and "Save Next >".

6.2.1.1 Controls

The following table details the controls that are present through the Injured Person section. Each control includes a description and control type.

Controls	Description	Control Type
Client Type	Click the dropdown arrow to select the injured person's client type.	Mandatory
First Name	Click in the textbox field to enter the injured person's first name.	Mandatory
Middle Name	Click in the textbox field to enter the injured person's middle name.	Not Mandatory

Last Name	Click in the textbox field to enter the injured person's last name.	Mandatory
Date of Birth	Click the calendar icon to select the injured person's date of birth.	Mandatory
Age	Auto Calculates	N/A
Gender	Click the dropdown arrow to select the injured person's gender.	Mandatory
Race	Click the dropdown arrow to select the injured person's race.	Mandatory
Ethnicity	Click the dropdown arrow to select the injured person's ethnicity.	Mandatory
Legal Status	Click the dropdown arrow to select the injured person's legal status.	Mandatory
Address Line 1	Click in the textbox field to enter injured person's Address Line 1.	Mandatory
Address Line 2	Click in the textbox field to enter injured person's Address Line 2.	Not Mandatory
City	Click in the textbox field to enter the injured person's city.	Mandatory
State	Click the drop-down arrow to select the injured person's state.	Mandatory
Zip Code	Click in the textbox field to enter the injured person's zip code.	Mandatory
County	Click the drop-down arrow to select the injured person's county.	Mandatory
Phone Number	Click in the textbox field to enter the injured person's phone number.	Not Mandatory
Mobile Phone Number	Click in the textbox field to enter a mobile phone number.	Not Mandatory
Alternate Phone Number	Click in the textbox field to enter an alternate phone number.	Not Mandatory
Email	Click in the textbox field to enter the injured person's email address.	Not Mandatory
IRIS Number	Click in the textbox field to enter the injured person's IRIS number.	Not Mandatory
Medicaid	Click in the textbox field to enter the injured person's Medicaid number.	Mandatory
PASSE MEMBER ID#	Click in the textbox field to enter the injured person's PASSE MEMBER ID number.	Not Mandatory
Contact Preference	Click the drop-down arrow to select the injured person's contact preference.	Not Mandatory

6.3 Alleged Perpetrator Information

The Alleged Perpetrator Information section of the incident report is mandatory. This section contains fields for contact and personal identification information about the alleged perpetrator.

6.3.1 Screenshot

Depending on the selection for the 'Relationship to Injured Person' field, additional fields, including 'First Name' and 'Last Name,' may become conditionally mandatory.

Report an Incident

Alleged Perpetrator Information

Relationship to Injured Person
Select an Option

First Name Middle Name Last Name

Date of Birth Age Gender
Select an Option

Race Ethnicity
Select an Option

Address Line 1

Address Line 2

City State Zip Code
Select an Option

County Phone Number Mobile Phone Number
Select an Option

Alternate Phone Number Email Contact Preference
Select an Option

Previous Save Next

6.3.1.1 Controls

The following table details the controls that are present through the Alleged Perpetrator Information section. Each control includes a description and control type.

Controls	Description	Control Type
Relationship to Injured Person	Click the dropdown arrow to select the alleged perpetrator's relationship to the injured person.	Mandatory

First Name	Click in the textbox field to enter the alleged perpetrator's first name.	Conditionally Mandatory
Middle Name	Click in the textbox field to enter the alleged perpetrator's middle name.	Not Mandatory
Last Name	Click in the textbox field to enter the alleged perpetrator's last name.	Conditionally Mandatory
Date of Birth	Click the calendar icon to select the alleged perpetrator's date of birth.	Not Mandatory
Age	Auto Calculates	N/A
Gender	Click the drop-down arrow to select the alleged perpetrator's gender.	Not Mandatory
Race	Click the drop-down arrow to select the alleged perpetrator's race.	Not Mandatory
Ethnicity	Click the drop-down arrow to select the alleged perpetrator's ethnicity.	Not Mandatory
Address Line 1	Click in the textbox field to enter the alleged perpetrator's Address Line 1.	Not Mandatory
Address Line 2	Click in the textbox field to enter the alleged perpetrator's Address Line 2.	Not Mandatory
City	Click in the textbox field to enter the alleged perpetrator's city.	Not Mandatory
State	Click the drop-down arrow to select the alleged perpetrator's state.	Not Mandatory
Zip Code	Click in the textbox field to enter the alleged perpetrator's zip code.	Not Mandatory
County	Click the drop-down arrow to select the alleged perpetrator's county.	Not Mandatory
Phone Number	Click in the textbox field to enter the alleged perpetrator's phone number.	Not Mandatory
Mobile Phone Number	Click in the textbox field to enter a mobile phone number.	Not Mandatory
Alternate Phone Number	Click in the textbox field to enter an alternate phone number.	Not Mandatory
Email	Click in the textbox field to enter the alleged perpetrator's email address.	Not Mandatory
Contact Preference	Click the drop-down arrow to select the alleged perpetrator's contact preference.	Not Mandatory

6.4 Incident Details

The Incident Details section of the incident report is mandatory. This section contains fields regarding the date, time, and other pertinent information about the incident.

6.4.1 Screenshot

Depending on the selection for the 'Type of Incident' field, additional fields may populate and become conditionally mandatory.

The screenshot shows a web form titled 'Report an Incident'. On the left is a vertical navigation menu with steps: Submitter Information, Injured Person, Alleged Perpetrator Information, Incident Details (highlighted with a blue circle), Provider/PASSE Information, Medical Attention Required, Notifications After Incident, Other Persons Involved, and Review and Submit Incident Report. The main area is titled 'Incident Details' and contains several fields: 'Date of Incident' with a calendar icon, 'Time of Incident' with a clock icon, 'Type of Incident' with a dropdown menu showing 'Select an Option', 'Location of Incident' with a text input field, 'Designation of Incident' with a dropdown menu showing 'Select an Option', 'Description of Incident' with a large text area, 'Were actions taken by the HCBS Provider?' with 'Yes' and 'No' radio buttons, 'Was incident preventable/anticipated?' with 'Yes' and 'No' radio buttons, and 'Is this a high priority incident?' with a dropdown menu showing 'No'. At the bottom left is a 'Previous' button, and at the bottom right are 'Save' and 'Next' buttons.

6.4.1.1 Controls

The following table details the controls that are present through the Incident Details section. Each control includes a description and control type.

Controls	Description	Control Type
Date of Incident	Click the calendar icon to select the date of the incident.	Mandatory
Time of Incident	Click the clock icon to select the time of the incident.	Mandatory
Type of Incident	Click the drop-down arrow to select the type of incident.	Mandatory
Location of Incident	Click in the textbox field to enter the location of the incident.	Mandatory
Designation of Incident	Click the drop-down arrow to select the designation of the incident.	Mandatory

Description of Incident	Click in the textbox field to enter a description of the incident.	Mandatory
Were actions taken by the HCBS Provider?	Click the radio button to answer 'Yes' or 'No' if actions were taken by the HCBS Provider.	Mandatory
Actions taken by HCBS Provider or Staff	Click the drop-down arrow to select actions taken by an HCBS Provider or Staff.	Conditionally Mandatory
Was incident preventable/anticipated?	Click the radio button to answer 'Yes' or 'No' if the incident was preventable or anticipated.	Mandatory
How?	Click in the textbox field to enter how the incident was preventable/anticipated.	Conditionally Mandatory
Is this a high priority incident?	Click the drop-down arrow to select if this incident is a high priority.	Mandatory

6.5 Provider/PASSE Information

The Provider/PASSE Information section of the incident report is mandatory. The submitter should select the Provider/PASSE associated with the incident.

6.5.1 Screenshot

← Back to all Incident Reports

Report an Incident

- ✓ Submitter Information
- ✓ Injured Person
- ✓ Alleged Perpetrator Information
- ✓ Incident Details
- **Provider/PASSE Information**
- Medical Attention Required
- Notifications After Incident
- Other Persons Involved
- Review and Submit Incident Report

Provider/PASSE Information

*Choose Provider/Agency
Select an Option

*Choose PASSE
Select an Option

← Previous Save Next →

6.5.1.1 Controls

The following table details the controls that are present through the Provider/PASSE Information page. Each control includes a description and control type.

Controls	Description	Control Type
Provider/ Agency	Click the drop-down arrow or type to use completion matching to select the Provider/Agency.	Mandatory
PASSE	Click the drop-down arrow or type to use completion matching to select the PASSE.	Mandatory

6.6 Medical Attention Required

The Medical Attention Required section of the incident report is not mandatory. This section contains fields regarding if medical attention is required for the injured person, including contact information for the physician and hospital involved. If medical attention was required, the submitter must provide *either* the Physician Name or Hospital Name to submit the incident report.

6.6.1 Screenshot

The screenshot shows a web application interface for reporting an incident. At the top left, there is a link: < Back to all Incident Reports. Below this is a header bar labeled 'Report an Incident'. On the left side, there is a vertical navigation menu with the following items: Submitter Information (checked), Injured Person (checked), Alleged Perpetrator Information (checked), Incident Details (checked), Provider/PASSE Information (checked), Medical Attention Required (selected with a blue circle), Notifications After Incident (disabled), Other Persons Involved (disabled), and Review and Submit Incident Report (disabled). The main content area is titled 'Medical Attention Required' and contains a question: 'Medical Attention Required?'. Below the question are two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected. At the bottom left of the form is a '< Previous' button, and at the bottom right are 'Save' and 'Next >' buttons.

[Back to all Incident Reports](#)

Report an Incident

- Submitter Information
- Injured Person
- Alleged Perpetrator Information
- Incident Details
- Provider/PASSE Information
- Medical Attention Required**
- Notifications After Incident
- Other Persons Involved
- Review and Submit Incident Report

Medical Attention Required

*Medical Attention Required?
☒ Yes ☐ No

Physician Name Hospital Name

*Address Line 1

Address Line 2

*City *State *Zip Code

*County Phone Number

[< Previous](#) [Save](#) [Next >](#)

6.6.1.1 Controls

The following table details the controls that are present through the Medical Attention Required page. Each control includes a description and control type.

Controls	Description	Control Type
Medical Attention Required?	Click the radio button to answer 'Yes' or 'No' if medical attention is required.	Mandatory
Physician Name	Click in the textbox field to enter the physician's name.	Not Mandatory
Hospital Name	Click in the textbox field to enter the hospital name.	Not Mandatory
Address Line 1	Click in the textbox field to enter the physician's Address Line 1.	Conditionally Mandatory
Address Line 2	Click in the textbox field to enter the physician's Address Line 2.	Not Mandatory
City	Click in the textbox field to enter the physician's city.	Conditionally Mandatory
State	Click the drop-down arrow the physician's state.	Conditionally Mandatory
Zip Code	Click in the textbox field to enter the physician's zip code.	Conditionally Mandatory

County	Click the drop-down arrow the physician's county.	Conditionally Mandatory
Phone Number	Click in the textbox field to enter the physician's phone number.	Not Mandatory

6.7 Notifications After Incident

The Notifications After Incident section of the incident report is mandatory. This section contains a list of fields regarding who is notified of the incident and how they are notified.

6.7.1 Screenshot

A notification may be added by clicking the '+ Notification Record' action button.

The screenshot shows a web application interface for reporting an incident. At the top left, there is a link '< Back to all Incident Reports'. Below this is a header 'Report an Incident'. On the left side, there is a vertical list of steps in the report process, each with a status icon (green checkmark for completed, blue circle for current, grey circle for future):

- Submitter Information (green checkmark)
- Injured Person (green checkmark)
- Alleged Perpetrator Information (green checkmark)
- Incident Details (green checkmark)
- Provider/PASSE Information (green checkmark)
- Medical Attention Required (green checkmark)
- Notifications After Incident (blue circle)
- Other Persons Involved (grey circle)
- Review and Submit Incident Report (grey circle)

The main content area is titled 'Notifications After Incident'. It contains a large empty box with the text 'Click the "+ Add New" button to include Notifications after Incident'. In the top right corner of this section, there is a blue button labeled '+ Add Notification Record'. At the bottom left of the form, there is a 'Previous' button. At the bottom right, there are 'Save' and 'Next >' buttons.

After the section is expanded, document the Notifications After Incident information.

6.7.1.1 Controls

The following table details the controls that are present through the Notifications After Incident section. Each control includes a description and control type.

Controls	Description	Control Type
Individuals/Agencies Notified	Click the drop-down arrow to select which agency was notified of the incident.	Mandatory
Notification Type	Click the drop-down arrow to select the preferred notification type.	Conditionally Mandatory
Notification Date	Click the calendar icon to select the notification date.	Conditionally Mandatory
Notification Time	Click the clock icon to select the notification time.	Conditionally Mandatory
User Actions	Description	
+ Add Notification Record	Click the '+ Add Notification Record' action button to generate fields to complete with notification information.	
Cancel	Click the 'Cancel' button to leave the page and not save any information.	
Save	Click the 'Save' button to save the completed information and remain on the page.	

6.8 Other Persons Involved

The Other Persons Involved section of the incident report is not mandatory. If choosing to add another person involved to the incident report, information fields will become mandatory.

6.8.1 Screenshots

A person can be added by clicking the '+ Add Other Person Involved' button.

The screenshot shows a web interface for reporting an incident. At the top left, there is a link '< Back to all Incident Reports'. Below this is a header 'Report an Incident'. On the left side, there is a vertical list of steps in the report process, each with a status icon (checkmark or circle) and a label: 'Submitter Information' (checked), 'Injured Person' (checked), 'Alleged Perpetrator Information' (checked), 'Incident Details' (checked), 'Provider/PASSE Information' (checked), 'Medical Attention Required' (checked), 'Notifications After Incident' (checked), 'Other Persons Involved' (selected with a blue circle), and 'Review and Submit Incident Report' (disabled with a grey circle). The main content area is titled 'Other Persons Involved' and contains a large empty box with a blue button '+ Add Other Person Involved' in the top right corner. Below the box, there is a text prompt: 'Click the "+ Add New" button to include additional persons involved'. At the bottom left, there is a '< Previous' button. At the bottom right, there are 'Save' and 'Next >' buttons.

After the section is expanded, document the Other Persons Involved information.

6.8.1.1 Controls & User Actions

The following table details the controls that are present through the Other Persons Involved section. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Relationship to Injured Person	Click the drop-down arrow to select the other involved person's relationship to the injured person.	Mandatory
First Name	Click in the textbox field to enter the other involved person's first name.	Mandatory
Middle Name	Click in the textbox field to enter the other involved person's middle name.	Not Mandatory
Last Name	Click in the textbox field to enter the other involved person's last name.	Mandatory
Address Line 1	Click in the textbox field to enter the other involved person's Address Line 1.	Mandatory
Address Line 2	Click in the textbox field to enter the other involved person's Address Line 2.	Not Mandatory

City	Click in the textbox field to enter the other involved person's city.	Mandatory
State	Click the drop-down arrow to select the other involved person's state.	Mandatory
Zip Code	Click in the textbox field to enter the other involved person's zip code.	Mandatory
County	Click the drop-down arrow to select the other involved person's county.	Mandatory
Phone Number	Click in the textbox field to enter the other involved person's phone number.	Mandatory
Mobile Phone Number	Click in the textbox field to enter the other involved person's mobile phone number.	Not Mandatory
Alternate Phone Number	Click in the textbox field to enter the other involved person's alternate phone number.	Not Mandatory
Email	Click in the textbox field to enter the other involved person's email address.	Not Mandatory
Contact Preference	Click the drop-down arrow to select the other involved person's contact preference.	Not Mandatory
User Actions	Description	
+ Add Other Person Involved	Click the '+ Add Other Person Involved' button to generate fields to complete with additional involved persons' information.	
Cancel	Click the 'Cancel' button to leave the page and not save any information.	
Save	Click the 'Save' button to save the completed information and remain on the page.	

6.9 Review and Submit Incident Report

The Review section of the Incident Report allows the user to review report section entries and edit details, if needed, and ultimately, submit the incident report.

6.9.1 Screenshot

6.9.1.1 Controls & User Actions

The following table details the controls that are present through the Review and Submit Incident Report page. Each user action includes a description.

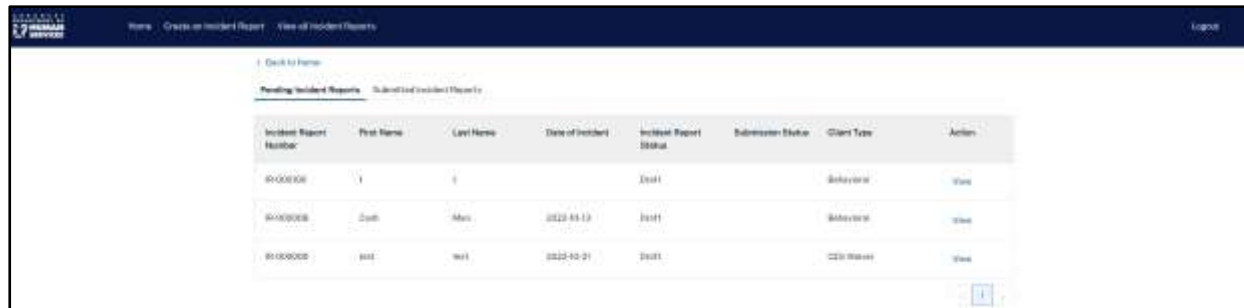
User Actions	Description
Edit	Click the 'Edit' pencil icon to edit a section of the incident report.
Previous	Click the 'Previous' button to return to the previous section.
Submit	Click the 'Submit' button to submit the report.

7 View All Incident Reports

7.1 Pending Incident Reports

Up to 12 pending incident reports will display per page. Users may navigate to view additional pending incident reports by using the page number buttons. Opening a pending incident report allows the user to continue completing the report.

7.1.1 Screenshot



The screenshot shows a web application interface for viewing incident reports. At the top, there is a navigation bar with a logo on the left and a 'Logout' button on the right. Below the navigation bar, there are two tabs: 'Pending Incident Reports' (which is active) and 'Submitted Incident Reports'. The main content area displays a table with the following columns: Incident Report Number, First Name, Last Name, Date of Incident, Incident Report Status, Submission Status, Client Type, and Action. The table contains three rows of data. The first row has an incident number of 81000008, first name 'J', last name 'J', date '2022-10-13', status 'Draft', submission status 'Submitted', client type 'Behavioral', and a 'View' action link. The second row has an incident number of 81000008, first name 'Zach', last name 'Max', date '2022-10-13', status 'Draft', submission status 'Submitted', client type 'Behavioral', and a 'View' action link. The third row has an incident number of 81000008, first name 'WILL', last name 'WILL', date '2022-10-21', status 'Draft', submission status 'Submitted', client type 'CDD Worker', and a 'View' action link. At the bottom right of the table, there is a pagination control showing '1'.

Incident Report Number	First Name	Last Name	Date of Incident	Incident Report Status	Submission Status	Client Type	Action
81000008	J	J	2022-10-13	Draft	Submitted	Behavioral	View
81000008	Zach	Max	2022-10-13	Draft	Submitted	Behavioral	View
81000008	WILL	WILL	2022-10-21	Draft	Submitted	CDD Worker	View

7.1.1.1 User Actions


The following table details the user actions that are present through the Pending Incident Reports page. Each user action includes a description.

User Actions	Description
Back to Home	Click the 'Back to Home' button to leave the 'Pending Incident Reports' page and return to the homepage.
View	Click the 'View' hyperlink to navigate to the corresponding in-progress incident report.

7.2 Submitted Incident Reports

Up to 12 submitted incident reports will display per page. Users may navigate to view additional submitted incident reports by using the page number buttons.

7.2.1 Screenshot

<div>  Home Create an Incident Report View All Incident Reports Logout </div>							
<div> Back to Home </div>							
<div> Pending Incident Reports Submitted Incident Reports </div>							
Incident Report Number	First Name	Last Name	Date of Incident	Incident Report Status	Submission Status	Client Type	Action
#-000027	Mary	Choi	2021-11-02	Submitted	Submitted	Behavioral	View
#-000028	JENNIFER	APPLEBEE	2022-11-08	Submitted	Submitted	CEU Values	View
#-000029	Joe	Green	2021-11-03	Complete - No Further Action Needed	Finalized Submission	Behavioral	View
#-000024	Robert	Williams	2021-11-08	Submitted	Updated Submission		View
#-000025	Audrey	Green	2021-11-08	Submitted	Submitted	Behavioral	View
#-000023	Marcus	Green	2022-11-04	Complete - No Further Action Needed	Finalized Submission	CEU Values	View
#-000030	Dennis	Green	2021-11-07	Complete - No Further Action Needed	Finalized Submission		View
#-000032	MICHAEL	BRIDGES	2021-11-07	Submitted	Submitted	CEU Values	View
#-000014	Jim	Walt	2021-11-04	Submitted	Updated Submission		View
#-000021	Julius	Evans	2021-11-08	Complete - No Further Action Needed	Finalized Submission	CEU Values	View

7.2.1.1 User Actions

The following table details the user actions that are present through the Submitted Incident Reports page. Each user action includes a description.

User Actions	Description
Back to Home	Click the 'Back to Home' button to leave the 'Submitted Incident Reports' page and return to the homepage.
View	Click the 'View' hyperlink to navigate to the corresponding submitted incident report.

8 Manage Incident Reports

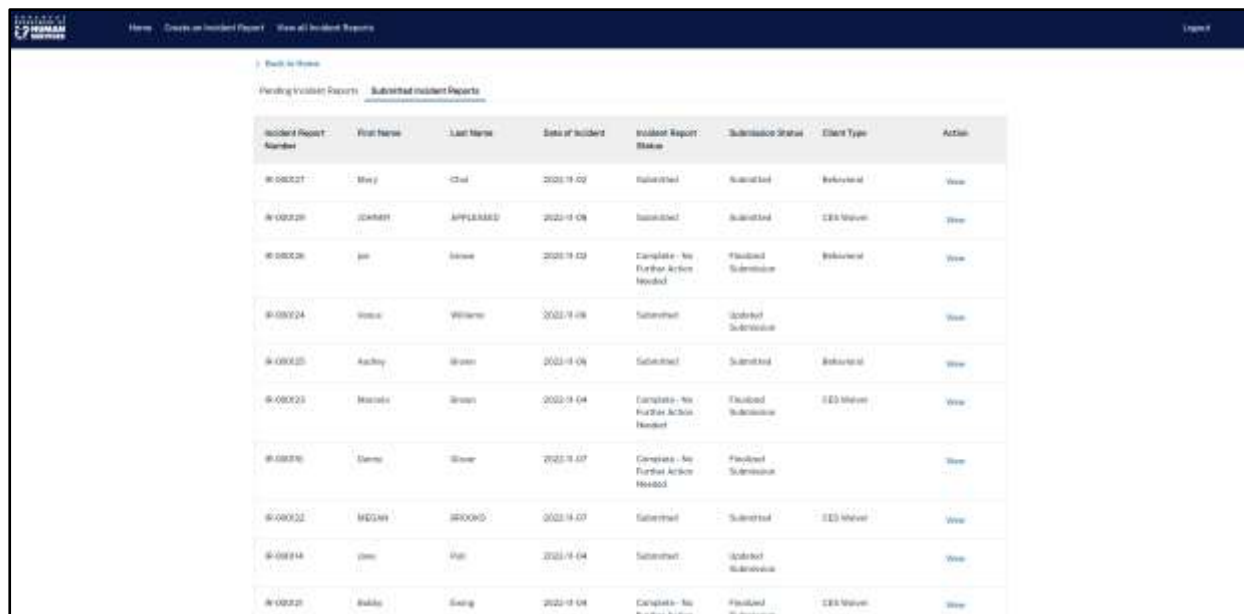
8.1 Overview

After the user has submitted an incident report, the user may view the submitted incident report in read-only format, as well as complete Related Actions.

Related Actions populate as a report section on the left navigation bar. A user may submit a follow-up action or view findings by clicking the appropriate Related Actions hyperlink. Multiple actions can occur within each of the two Related Actions.

8.1.1 Screenshot

To begin managing an incident report, open the Submitted Incident Reports tab on the 'View All Incident Reports' page.



The screenshot shows a web application interface for managing incident reports. At the top, there is a navigation bar with links for 'Home', 'Create an Incident Report', and 'View All Incident Reports'. Below the navigation bar, there are two tabs: 'Pending Incident Reports' and 'Submitted Incident Reports'. The 'Submitted Incident Reports' tab is active, displaying a table of incident reports. The table has columns for 'Incident Report Number', 'First Name', 'Last Name', 'Date of Incident', 'Incident Report Status', 'Submission Status', 'Client Type', and 'Action'. The table contains 10 rows of data, each representing a submitted incident report. The 'Action' column for each row contains a 'View' link.

Incident Report Number	First Name	Last Name	Date of Incident	Incident Report Status	Submission Status	Client Type	Action
IR-000021	Wiley	Chad	2023-10-02	Submitted	Submitted	Behavioral	View
IR-000020	JOHNSON	APPLEBERRY	2023-10-06	Submitted	Submitted	CEB Member	View
IR-000026	Lee	James	2023-10-03	Complete - No Further Action Needed	Finalized Submission	Behavioral	View
IR-000024	Woods	Williams	2023-10-06	Submitted	Submitted		View
IR-000025	Audley	Brown	2023-10-06	Submitted	Submitted	Behavioral	View
IR-000023	Moscola	Brown	2023-10-04	Complete - No Further Action Needed	Finalized Submission	CEB Member	View
IR-000016	Carroll	Stover	2023-10-07	Complete - No Further Action Needed	Finalized Submission		View
IR-000022	MEDLEY	BRIDGES	2023-10-07	Submitted	Submitted	CEB Member	View
IR-000014	Lee	Paul	2023-10-04	Submitted	Submitted		View
IR-000025	Bullock	Swing	2023-10-06	Complete - No Further Action Needed	Finalized Submission	CEB Member	View

Upon clicking the 'View' button, the submitted incident report will populate. To view and manage the Related Actions of the incident report, click the 'Related Actions' section on the left navigation bar.

Report an Incident

Incident Report Number	Injured Person	Incident Report Status	Submission Status	Last Updated Date
IR-000127	Mary Choi	Submitted	Submitted	11/9/2022

Some fields have been locked and can not be edited at this time. If you are looking to edit/update a field that has been locked, please reach out to DDS staff. Thank you.

[Finalize Submission](#)

① Submitter Information

② Injured Person

③ Alleged Perpetrator Information

④ Incident Details

⑤ Provider/PASSE Information

⑥ Medical Attention Required

⑦ Notifications After Incident

⑧ Other Persons Involved

⑨ Related Actions

Submitter Information

* Relationship to Injured Person

Unknown

* First Name

Brad

Middle Name

* Last Name

Jones

Organization

* Address Line 1

123 main st.

Address Line 2

Report an Incident

Incident Report Number	Injured Person	Incident Report Status	Submission Status	Last Updated Date
IR-000127	Mary Choi	Submitted	Submitted	11/9/2022

Some fields have been locked and can not be edited at this time. If you are looking to edit/update a field that has been locked, please reach out to DDS staff. Thank you.

[Finalize Submission](#)

① Submitter Information

② Injured Person

③ Alleged Perpetrator Information

④ Incident Details

⑤ Provider/PASSE Information

⑥ Medical Attention Required

⑦ Notifications After Incident

⑧ Other Persons Involved

⑨ Related Actions

Related Actions

[Submit a Follow-Up action](#)
[View Findings](#)

8.1.1.1 User Actions

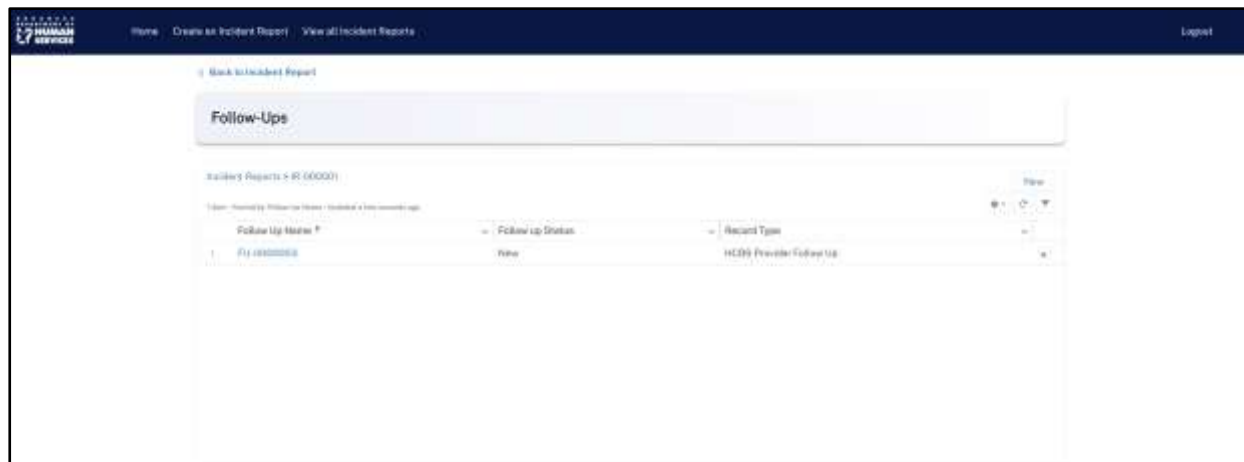
The following table details the user actions that are present through the Submit a Follow-up Action page. Each user action includes a description.

User Actions	Description
Finalize Submission	Click the 'Finalize Submission' action button to submit the incident report and lock all fields from further editing. This is the final incident report submission.
Submit a Follow-Up Action	Click the 'Submit a Follow-Up action' hyperlink to open the Follow-Ups List page and submit a new follow-up for the incident report.
View Findings	Click the 'View Findings' hyperlink to view follow-up action findings for the incident report.
Back to all Incident Reports	Click the 'Back to all Incident Reports' button to leave the incident report and return to Submitted Incident Reports page.

8.2 Follow-Ups List Page

Upon clicking the 'Submit a Follow-up Action' hyperlink, the user is navigated to the Follow-Ups List page. The Follow-Ups List page allows users to view, search, and filter all associated follow-up records. To view a Follow-Up record, click the Follow Up Name hyperlink.

8.2.1 Screenshot



8.2.1.1 Controls & User Actions

The following table details the controls that are present through the Submit a Follow-up Action page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
----------	-------------	--------------

Follow Up Name	Displays a list view format which allows the user to sort in ascending or descending order.	Hyperlink
Follow up Status	Displays a list view format which allows the user to sort in ascending or descending order.	Read Only
Record Type	Displays a list view format which allows the user to sort in ascending or descending order.	Read Only
User Actions	Description	
New	Click the 'New' button to create a new follow-up action.	
Settings	Click the 'Settings' button to display a drop-down list of list view controls.	
Refresh	Click the 'Refresh' button to refresh the list view page.	
Filter	Click the 'Filter' button to select a filter to view certain selected follow-ups.	

8.3 Follow Up Details Page

Upon opening the Follow Up Name hyperlink, a Follow Up Details page will populate, which shows all Follow Up details and information that should be completed. Users may edit the follow up, as well as add new Documents in the Related Links section.

8.3.1 Screenshot

8.3.1.1 Controls & User Actions

The following table details the controls that are present through the Follow-Up Details record page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Follow Up Name	Displays the Follow Up Name.	Pre-Populated
Record Type	Displays the Record Type.	Pre-Populated
Incident Report	Click the 'Incident Report' hyperlink to view the Incident Report.	Hyperlink
Date of Follow-Up Visit	Click the pencil icon to edit the date of follow-up visit.	Editable

Who conducted the follow up?	Click the pencil icon to edit who conducted the follow up.	Editable
Notes/Actions taken during Follow-Up	Click the pencil icon to edit the notes/actions taken during the follow-up.	Editable
Was there a change of HCBS Provider?	Click the pencil icon to edit if there was a change of HCBS Provider.	Editable
HCBS Provider if different from Report	Click the pencil icon to edit if the HCBS Provider is different from the Report.	Editable
Did follow-up visit resolve the issue?	Click the pencil icon to edit if the follow-up visit did resolve the issue.	Editable
Follow up Status	Click the pencil icon to edit the follow-up status.	Editable
HCBS Provider	Click the pencil icon to edit the HCBS Provider.	Editable
Related Links		
Documents	Click the 'Documents' Related Link hyperlink to open the page containing documents associated with the Follow-up.	Hyperlink
Notes	Click the 'Notes' Related Link hyperlink to open the page containing notes records associated with the Follow-Up.	Hyperlink
User Actions	Description	
Edit	Click the 'Edit' button or field pencil icon to edit the record of a specific section of the incident report.	
New	Click the 'New' button to create a new document record.	
Cancel	Click the 'Cancel' button to leave the page and not save any information.	

8.4 New Follow Up: HCBS Provider Follow Up

Upon clicking the 'New' button on the Follow-Up List page *or* the 'Edit' button on a Follow-Up details page, a 'New Follow Up: HCBS Provider Follow Up' pop-up window generates for the user to complete. Upon save, the Follow-Up details page will show all entered information.

8.4.1 Screenshot

✕

Edit FU-0000003

Follow Up Name
FU-0000003

Incident Report
IR-000001

* Who conducted the follow up?

* Was there a change of HCBS Provider?

No

Did follow-up visit resolve the issue?
☐

* HCBS Provider

Test_HCBS Provider

Record Type
HCBS Provider Follow Up

* Date of Follow-Up Visit

|

* Notes/Actions taken during Follow-Up

HCBS Provider if different from Report

* Follow up Status

New

Cancel

Save & New

Save

8.4.1.1 Controls & User Actions

The following table details the controls that are present through the Submit a Follow-up Action page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Follow Up Name	The 'Follow Up Name' field will system generate upon save.	Pre-Populated
Record Type	Displays the record type.	Pre-Populated
Incident Report	Displays the incident report number.	Pre-Populated
Date of Follow-Up Visit	Click in the calendar icon to select the date of follow-up visit.	Mandatory
Who conducted the follow up?	Click in the textbox field to enter who conducted the follow-up.	Mandatory
Notes/Actions taken during Follow-Up	Click in the textbox field to enter the notes/actions taken during the follow-up.	Mandatory

Was there a change of HCBS Provider?	Click the drop-down arrow to select if there was a change of HCBS Provider.	Mandatory
HCBS Provider if different from Report	Click in the textbox field to enter the HCBS Provider if it is different from the report.	Conditionally Mandatory
Did follow-up visit resolve the issue?	Click the checkbox if the follow-up visit resolved the issue.	Not Mandatory
Follow up Status	Click the drop-down arrow to select the follow up status.	Mandatory
HCBS Provider	Click in the search lookup textbox field to select the HCBS Provider.	Mandatory
User Actions	Description	
Cancel	Click the 'Cancel' button to leave the page and not save any information.	
Save & New	Click the 'Save & New' button to save the information to create a new record.	
Save	Click the 'Save' button to save the information.	

8.5 Follow Up: Documents

Upon clicking the 'New' button on the Documents Related Link on the Follow Up Details page, a 'New Documents' pop-up window generates for the user to complete.

8.5.1 Screenshot

8.5.1.1 Controls

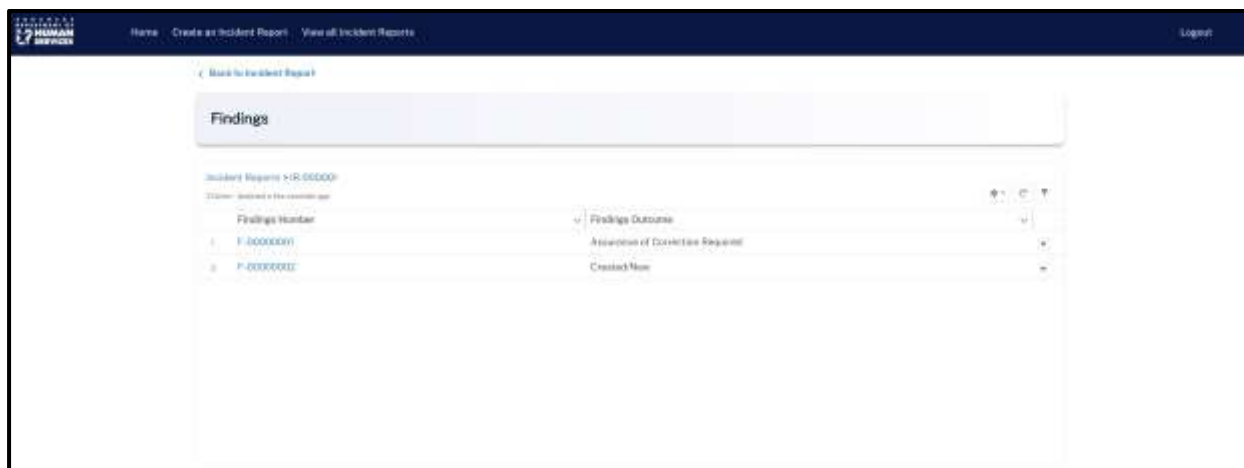
The following table details the controls that are present through the Follow-Up New Documents pop-up window. Each control includes a description and control type.

Controls	Description	Control Type
Document Name	The system will generate the 'Document Name' when the record is saved.	System Generated
Provider Action	Click in the search lookup textbox field to enter the Provider Action Number.	System Generated
Follow Up	Displays the Follow Up ID.	Auto Populated
Findings	The system will generate the 'Findings ID' when the record is saved.	System Generated
Document Type	Click the dropdown arrow to select the document type.	Mandatory
If other, please describe?	Click in the textbox field to enter the other document type description, if applicable.	Conditionally Mandatory

8.6 Findings List Page

Upon clicking the 'View Findings' hyperlink, the user is navigated to the Findings List page. The Findings List page allows users to view, search, and filter all associated findings records. To view a Findings record, click the Findings Number hyperlink.

8.6.1 Screenshot



8.6.1.1 Controls & User Actions

The following table details the controls that are present through the Findings page. Each control includes a description and control type. Each user action includes a description.

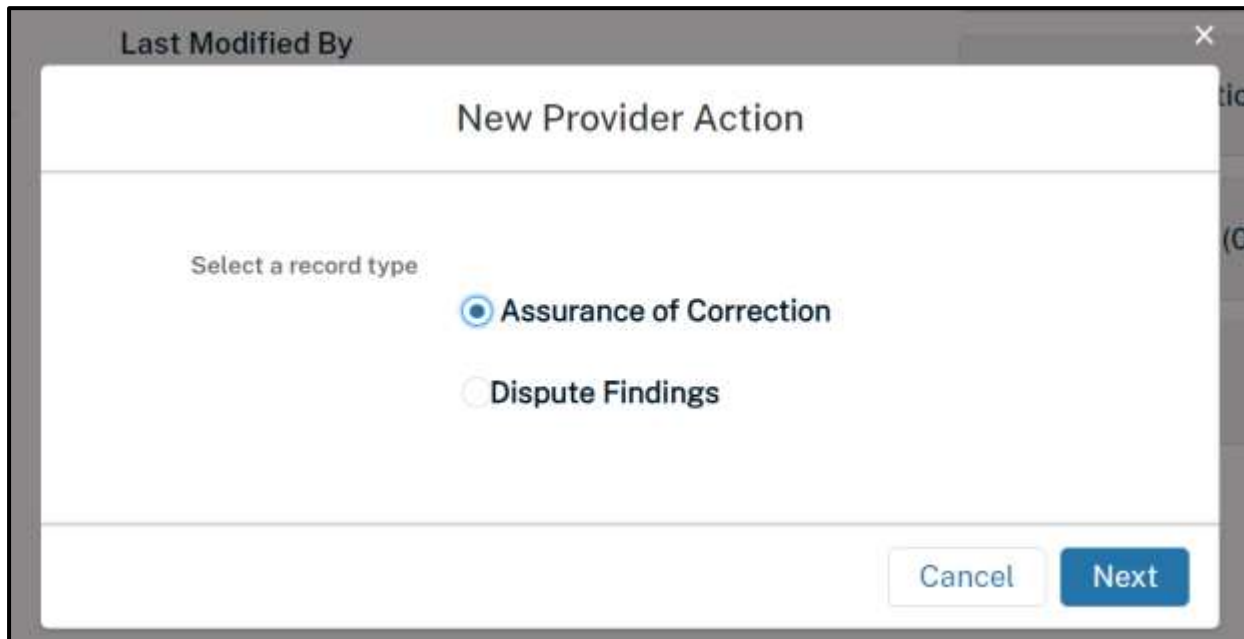
Controls	Description	Control Type
Findings Number	Displays a list view format which allows the user to sort in ascending or descending order.	Hyperlink
Findings Outcome	Displays a list view format which allows the user to sort in ascending or descending order.	Read Only

User Actions	Description
Settings	Click the 'Settings' button to display a drop-down list of list view controls.
Refresh	Click the 'Refresh' button to refresh the list view page.
Filter	Click the 'Filter' button to select a filter to view certain selected Case Files.

8.7 New Provider Actions: Assurance of Correction

8.7.1 Screenshot

Upon clicking the 'New' button on the Provider Actions Related Link, a 'New Provider Action' pop-up window generates for the user to complete.



The screenshot shows a modal window titled "New Provider Action". Inside the window, under the heading "Select a record type", there are two radio button options. The first option, "Assurance of Correction", is selected with a blue dot. The second option, "Dispute Findings", is unselected. At the bottom right of the window, there are two buttons: a light blue "Cancel" button and a dark blue "Next" button.

After selecting the record type and clicking the 'Next' button, a record-specific pop-up window will appear with fields for the user to document.

8.7.1.1 Controls & User Actions

The following table details the controls that are present through the Findings page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Select a record type	Click the radio button to select which Provider Action record type to create.	Radio Button
Provider Action Number	The system will generate the 'Provider Action Number' when the record is saved.	System Generated
Record Type	Displays the record type.	Pre-Populated
Incident Report ID	The 'Incident Report ID' field will system generate upon save.	System Generated
Follow Up required?	Click the checkbox if assurance correction follow-up is required.	Not Mandatory
Findings	Displays the Findings Name.	Pre-Populated
Provider Name	Click in the search lookup textbox field to enter the Provider Name.	Mandatory
PASSE	The system will generate the 'PASSE' when the record is saved.	System Generated
Status	Click the dropdown arrow to select the Provider Action status.	Mandatory
Assurance of Correction Description	Click in the textbox field to enter the Assurance of Correction description.	Mandatory

User Actions	Description
Next	Click the 'Next' button to advance to the 'New Provider Action: Assurance of Correction' pop-up window.

8.8 New Provider Actions: Dispute Findings

8.8.1 Screenshot

Upon clicking the 'New' button on the Provider Actions Related Link, a 'New Provider Action' pop-up window generates for the user to complete.

The screenshot shows a pop-up window titled "New Provider Action". Inside the window, there is a section labeled "Select a record type" with two radio button options: "Assurance of Correction" and "Dispute Findings". The "Dispute Findings" option is selected. At the bottom right of the window, there are two buttons: "Cancel" and "Next".

After selecting the record type and clicking the 'Next' button, a record-specific pop-up window will appear with fields for the user to document.

IR-000112

Conclusion

New Provider Action: Dispute Findings

Provider Action Number

Record Type
Dispute Findings

Incident Report ID

Findings
F-00000004

* Date of Dispute

* Subject of Dispute

* Dispute Notes

Cancel Save & New Save

8.8.1.1 Controls & User Actions

The following table details the controls that are present through the Findings page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Select a record type	Click the radio button to select which Provider Action record type to create.	Radio Buttons
Provider Action Number	The system will generate the 'Provider Action Number' when the record is saved.	System Generated
Record Type	Displays the record type.	Pre-Populated
Date of Dispute	Click in the calendar lookup field to enter the date of dispute.	Mandatory
Incident Report ID	The system will generate the 'Incident Report ID' when the record is saved.	System Generated
Subject of Dispute	Click in the textbox field to enter the subject of dispute.	Mandatory
Findings	Displays the Findings Name.	Pre-Populated
Dispute Notes	Click in the textbox field to enter the dispute notes.	Mandatory
User Actions	Description	
Next	Click the 'Next' button to advance to the 'New Provider Action: Dispute Findings' pop-up window.	

8.9 Findings: Documents

Upon clicking the 'New' button on the Documents Related Link on the Provider Actions Details page, a 'New Documents' pop-up window generates for the user to complete.

8.9.1 Screenshot

Record Type Documents (1)

New Documents

Details

Document Name Provider Action
P-000000

Follow Up Findings

* Document Type --None-- If other, Please describe?

Cancel Save & New Save

8.9.1.1 Controls

The following table details the controls that are present through the Findings page. Each control includes a description and control type.

Controls	Description	Control Type
Document Name	The system will generate the 'Document Name' when the record is saved.	System Generated
Provider Action	Click in the search lookup textbox field to enter the Provider Action Number.	Not Mandatory
Follow Up	Click in the search lookup textbox field to enter the Follow Up Name.	Not Mandatory
Findings	Displays the Findings ID.	Auto Populated
Document Type	Click the dropdown arrow to select the document type.	Mandatory
If other, please describe?	Click in the textbox field to enter the other document type description, if applicable.	Conditionally Mandatory

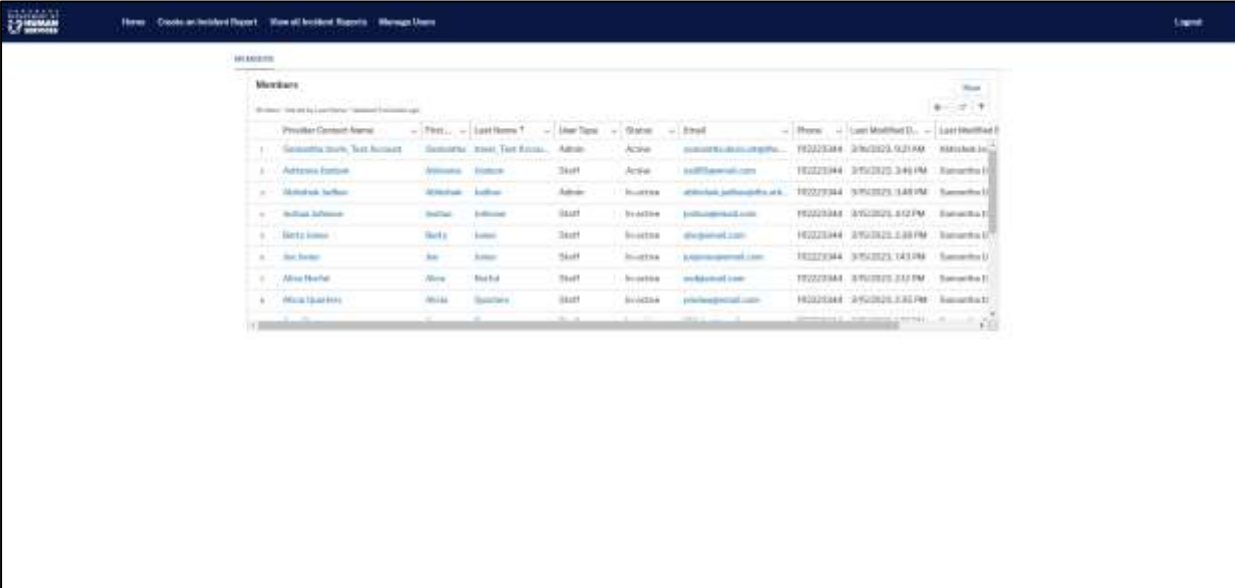
9 Manage Users

9.1 Overview

The Provider User may view the list of all Provider Contact name and details associated with their account. It is through the *Manage Users* tab that Provider Admins may edit, and enable or disable the contact user accounts for their staff.

9.1.1 Screenshot

To begin adding a new Provider Contact, click the **NEW** button:



The screenshot displays the 'Manage Users' interface. At the top, there is a navigation bar with links: 'Home', 'Create an Incident Report', 'View all Incident Reports', and 'Manage Users'. The 'Manage Users' link is active. Below the navigation bar, there is a 'Members' section. It includes a search bar and a table of provider contacts. The table has columns for 'Provider Contact Name', 'First Name', 'Last Name', 'User Type', 'Status', 'Email', 'Phone', 'Last Modified By', and 'Last Modified On'. There are 8 rows of data, each representing a provider contact. The first row is 'Suzanne Clark, Test Account' with status 'Active'. The second row is 'Antonio Fontana' with status 'Active'. The third row is 'Anthony Fontana' with status 'Inactive'. The fourth row is 'John Smith' with status 'Inactive'. The fifth row is 'John Smith' with status 'Inactive'. The sixth row is 'John Smith' with status 'Inactive'. The seventh row is 'John Smith' with status 'Inactive'. The eighth row is 'John Smith' with status 'Inactive'. The table is paginated, showing 8 of 8 items.

Provider Contact Name	First Name	Last Name	User Type	Status	Email	Phone	Last Modified By	Last Modified On
Suzanne Clark, Test Account	Suzanne	Clark, Test Account	Admin	Active	suzanne.clark@org.com	90222384	3/6/2025, 9:21 AM	System
Antonio Fontana	Antonio	Fontana	Staff	Active	antonio@org.com	90222384	3/6/2025, 3:46 PM	System
Anthony Fontana	Anthony	Fontana	Admin	Inactive	anthony.fontana@org.com	90222384	3/6/2025, 1:48 PM	System
John Smith	John	Smith	Staff	Inactive	john@org.com	90222384	3/6/2025, 8:12 PM	System
John Smith	John	Smith	Staff	Inactive	john@org.com	90222384	3/6/2025, 3:38 PM	System
John Smith	John	Smith	Staff	Inactive	john@org.com	90222384	3/6/2025, 1:43 PM	System
John Smith	John	Smith	Staff	Inactive	john@org.com	90222384	3/6/2025, 2:12 PM	System
John Smith	John	Smith	Staff	Inactive	john@org.com	90222384	3/6/2025, 3:33 PM	System

Upon clicking the 'NEW' button, the New Provider Contact window will display.

New Provider Contact: HCBS Provider/PASSE Provider Contact

*Name
 Salutation: --None--
 First Name:
 Middle Name:
 *Last Name:

*Email:

Provider Name: GAT Testing PASSE
 Phone: 1112223344
 Fax:

*User Type: --None--

Address
 Address Line 1:
 Address Line 2:
 City:
 State: --None--
 Zip Code:
 County: --None--

Start Date:
 End Date:

Buttons: Cancel, Save & New, Save

9.1.1.1 Controls & User Actions

The following table details the user actions that are present through the New Provider Contact page. Each user action includes a description and control type.

Controls	Description	Control Type
Name		
Salutation	Click the drop-down arrow to select appropriate salutation.	Not Mandatory
First Name	Click in the textbox field to enter first name.	Not Mandatory
Middle Name	Click in the textbox field to enter middle name.	Not Mandatory
Last Name	Click in the textbox field to enter last name.	Mandatory
Email	Click in the textbox field to enter the email address.	Mandatory
Provider Name	System will populate the field.	System-Generated
Phone	Click in the textbox field to enter phone information.	Not Mandatory
Fax	Click in the textbox field to enter fax information.	Not Mandatory
User Type	Click the drop-down arrow to select user type.	Mandatory
Address Line 1	Click in the textbox field to enter the person's Address Line 1.	Not Mandatory

Address Line 2	Click in the textbox field to enter the person's Address Line 2.	Not Mandatory
City	Click in the textbox field to enter the city.	Not Mandatory
State	Click the drop-down arrow to select the state.	Not Mandatory
Zip Code	Click in the textbox field to enter the zip code.	Not Mandatory
County	Click the drop-down arrow to select the county.	Not Mandatory
Start Date	System will generate the start date.	System-Generated
End Date	System will generate the start date.	System-Generated

User Actions	Description
Cancel	Click the 'Cancel' button to leave the page and not save any information.
Save & New	Click the 'Save & New' button to save the information to create a new record.
Save	Click the 'Save' button to save the information.

9.1.2 Screenshot

To enable user, click the **Enable User** button:

The screenshot displays a web form for managing provider contact information. At the top right, there are two buttons: 'Enable User' and 'Disable User'. The form is divided into several sections: 'Provider Contact' (Name, Phone, Email), 'Address' (Address Line 1, Address Line 2, City, State, Zip Code, County), and 'Provider User Details' (Provider User, Start Date, End Date). A 'Provider Contact History' table is also visible on the right side of the form.

To disable user, click the **Disable User** button:

The screenshot displays the 'Provider Contact' page. At the top, there are buttons for 'Enable User' and 'Disable User'. The main form is divided into two columns. The left column contains fields for 'Name' (with a sub-label 'Provider Name'), 'Phone', 'Email', 'User Type', 'Address' (with sub-labels 'Address Line 1' and 'Address Line 2'), 'City', 'State', 'Zip Code', and 'Provider User Details' (with sub-labels 'Provider User', 'Start Date', and 'End Date'). The right column contains fields for 'Phone', 'Email', 'Provider Type', 'HHS Provider Type', 'Status', and 'End Date'. A table titled 'Provider Contract History (8)' is also visible, showing columns for 'Date', 'From', 'To', 'Original S...', and 'New Value'. The table contains three rows of data.

Date	From	To	Original S...	New Value
1/1/20	Provider	Contract...	Contract S...	2023-03
1/1/20	Start Date	Contract...		
1/1/20	Contract	Contract...		

9.1.2.1 User Actions

The following table details the user actions that are present on the Provider Contact page. Each user action includes a description and control type.

Controls	Description	Control Type
ENABLE USER	Click the hyperlink button to enable the user.	Hyperlink
DISABLE USER	Click the hyperlink button to disable the user.	Hyperlink