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<th>Ver</th>
<th>Description</th>
<th>Contributors</th>
<th>Update Author</th>
</tr>
</thead>
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<tr>
<td>09/15/2006</td>
<td>1.0</td>
<td>Initial Version</td>
<td>ODA IT Dept.</td>
<td>C. Brickner</td>
</tr>
<tr>
<td>01/04/2007</td>
<td>2.0</td>
<td>Program Changes</td>
<td>ODA IT Dept.</td>
<td>C. Brickner</td>
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<td>02/06/2007</td>
<td>3.0</td>
<td>How to select a consumer in invoice entry</td>
<td>ODA IT Dept.</td>
<td>C. Brickner</td>
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<td>05/23/2007</td>
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<td>CHOICES cap increase</td>
<td>ODA IT Dept.</td>
<td>C. Brickner</td>
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<td>08/17/2009</td>
<td>7.0</td>
<td>Update Security Certificate prompts and define Status column on Invoice Report screen</td>
<td>ODA IT Dept.</td>
<td>C. Brickner</td>
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<td>Choices billing changes</td>
<td>ODA IT Dept.</td>
<td>C. Brickner</td>
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<tr>
<td>06/27/2019</td>
<td>9.0</td>
<td>Revisions for APEX 19.1 upgrade. Removed Choices workflow</td>
<td>ODA IT Dept</td>
<td>D. Hill-Zhanai</td>
</tr>
</tbody>
</table>
This page intentionally left blank.
The Direct Data Entry (DDE) billing system is one of the replacements for the Data Entry Module (DEM) currently used by many Pre-Admission Screening System Providing Options and Resources Today (PASSPORT) providers to enter and submit PASSPORT Information Management System (PIMS) invoices to PASSPORT Administrative Agencies (PAAs).

Changes/updates made in PIMS to a consumer will be reflected in DDE system the following day. Updates from PIMS to the DDE system are made nightly.

1. **System requirements**
   The minimum PC requirements to utilize the DDE application are 512mb system memory and an operating system capable of running one of the following browser versions (or higher) with JavaScript enabled: Mozilla/4.0+, Mozilla/5.0+, MS Internet Explorer 6.0+, Gecko/20060728+, Firefox/1.5.0.6 +.

2. **How to Login**
   a) Open a browser.
   b) In the address bar enter: https://dde.age.ohio.gov/
   c) Press enter. This site can be bookmarked.
   d) If prompted for a Security Certificate, proceed to Section 4. Security Certificate
   e) Enter your user name and password provided to you by your PASSPORT Administrative Agency. Press enter. Username and password are not case-sensitive. If prompted by the browser to save password, decline.
   f) If the user attempts to login with an invalid password and exceeds the number of attempts allowed by the system, the account will be disabled. Contact your PAA administrator regarding your account status.
g) **Forgot my Password:** If you have forgotten your password, enter your user name in the User Name field and click the "Forgot my password" link. If your account is not locked and you have access to the email account associated to your user profile in DDE, an email will be sent to you regarding a password reset.

![User Name and Password Fields]

This is the login page for DDE v2 2019 upgrade to APEX 5.x

**Forgot my password**

Type in your User Name above then click the "Forgot my password" link above to have it emailed to you. Your password will be sent to the email address associated with the User ID you entered above if the user profile for that ID is currently on file at the Ohio Department of Aging.

### 3. Session timeout

A user’s session will timeout after 60 minutes of inactivity. If, for a period of time, you leave the DDE application alone or perform actions (ex: scrolling, entering data, reading a downloaded report) that does not generate a call to the server, the application logs you out and you will be prompted to log in again. A timer will appear on the screen and start counting down to inform the user when the session will expire. **Ex: Your session will expire in 00:59:48.**
4. Security Certificate

Always accept or install the website’s security certificate when prompted by the web browser. It is a valid certificate issued from the State of Ohio’s Office of Information Technology.

a) Firefox

(1) The “This Connection is Untrusted” screen will display.

![This Connection is Untrusted]

You have asked Firefox to connect securely to dde.age.ohio.gov, but we can't confirm that your connection is secure.

(2) Click “I Understand the Risks.”

![I Understand the Risks]

(3) Click “Add Exception.”

![Add Exception...]

(4) Click “Confirm Security Exception” at the Add Security Exception screen.

![Add Security Exception]

Legitimate banks, stores, and other public sites will not ask you to do this.

Server Location: https://dde.age.ohio.gov/

Certificate Status

This site attempts to identify itself with invalid information.

Unknown Identity

Certificate is not trusted, because it hasn’t been verified by a recognized authority.

Confirm Security Exception
4. **Security Certificate (cont’d.)**

   b) **Internet Explorer**

   (1) The “There is a problem with this website’s security certificate” screen will display.

   ![Certificate Error](image1.png)

   (2) Click “Continue to this website.”

   ![Continue to this website](image2.png)

   (3) Click “Certificate Error” in the upper right hand corner.

   ![Certificate Error](image3.png)

   (4) Click “View Certificates” at the Untrusted Certificate screen.

   ![View certificates](image4.png)
4. **Security Certificate (cont’d.)**

b) Internet Explorer (cont’d.)

(5) Click “Install Certificate” at the Certificate window.

(6) Click “Next” at the Certificate Import Wizard window.

(7) Click “Next” at the Automatically select the certificate store based on the type of certificate prompt.

(8) Click “Finish” at the Completing the Certificate Import Wizard window.

(9) Click “Yes” at the Security Warning window.

(10) Click “Ok” at The import was successful prompt.

(11) Click Ok to close the Certificate window.
5. Maintenance and System Outages

- When the DDE application is unavailable for maintenance, the screen will display: 
  *The DDE is currently unavailable while maintenance is being performed. Please try again in 30 minutes.*

- If there is a system outage and the application is unavailable, the screen will display: 
  *Page not found or Service Temporarily Unavailable. The server is temporarily unable to service your request due to maintenance downtime or capacity problems. Please try again later.*

6. Forgotten password

   a) Type in your User Name then click, **Forgot my password**.
   b) The password will be sent to the email address associated with the User Name profile. A deactivated account cannot request their password to be reset.

7. Forgotten User Name

   Contact your PAA for a forgotten User Name.

8. Who to call for help

   Contact your PAA for assistance with the application.

9. User Roles

   - There are five roles available in DDE. Your role is determined by your PAA.
   - Once logged in, the options available and the data displayed will vary depending on your Role ID.
   - The screen will indicate in green text your login Role ID.
     Ex: *Welcome 6vkorteprov, you are logged on and working as a Provider Operator.*

   a) **PAA Administrator**
      - Controls accounts created under specific PAA and can perform data entry and view reports for provider operators within PAA.

   b) **PAA Operator**
      - Performs data entry and view reports for provider operators within PAA.

   c) **Provider Operator Invoice and Reports**
      - Performs data entry and can generate reports for their authorized locations in a PAA.

   d) **Provider Operator Reports only**
      - Generates reports for their authorized locations in a PAA.

   e) **Fiscal Intermediary**
      - Performs CHOICES data entry and can generate reports for their authorized PAA.
10. Menus

a) Invoices Screen

The options available and the data displayed are based on your role in DDE.

<table>
<thead>
<tr>
<th>Invoices Screen</th>
<th>Invoice Status</th>
<th>Choices Invoice Entry</th>
<th>Work As a Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAA Administrator *</td>
<td>X</td>
<td>X **</td>
<td>X</td>
</tr>
<tr>
<td>PAA Operator *</td>
<td>X</td>
<td>X **</td>
<td>X</td>
</tr>
<tr>
<td>Fiscal Intermediary</td>
<td>X</td>
<td>X **</td>
<td></td>
</tr>
<tr>
<td>Provider Operator</td>
<td>X</td>
<td>X **</td>
<td></td>
</tr>
</tbody>
</table>

* To start an invoice, these Roles must work on behalf of a provider.
** Able to invoice Choices services on behalf of all providers.
*** Choices Invoice Entry screen only displays the provider operator’s Choices consumers.

b) Reports Screen

The options available and the data displayed are based on your role in DDE.

<table>
<thead>
<tr>
<th>Reports Screen</th>
<th>Invoice Report</th>
<th>Consumer List</th>
<th>Services List</th>
<th>Choices Provider List</th>
<th>Download EDI Reports</th>
<th>Usage stats**</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAA Administrator *</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>PAA Operator *</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Fiscal Intermediary</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Provider Operator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Provider Operator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

 Provider Operator Reports Only

* To view the Consumer List, Services List and Download Electronic Data Interchange (EDI) Reports, these Roles must work on behalf of a provider.
** This function is covered in detail in the PAA Administrator Role User Maintenance Manual.

c) Maintenance Screen

The options available and the data displayed are based on your role in DDE.

<table>
<thead>
<tr>
<th>Maintenance Screen</th>
<th>Change My Password</th>
<th>Change my Email Address</th>
<th>Research Assistant</th>
<th>Email Lists **</th>
<th>User Maintenance **</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAA Administrator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>PAA Operator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Fiscal Intermediary</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provider Operator</td>
<td>X</td>
<td>X</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Provider Operator</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

 Provider Operator Reports Only

* These functions are covered in detail in the PAA Administrator Role User Maintenance Manual.
10. **Menus (cont’d.)**

d) **Print**

(1) Print option is available for All Roles.

(2) **Click Print** (button located in upper right hand corner of screen) to convert the information on the page to a printer friendly view.

(3) **Click File** (in IE7 it might be necessary to press the Alt key to display the browser’s main menu), select **Print**. Confirm the Printer, click Ok.

(4) **Click** the browser’s Back button to return to the application.

e) **Logout**

(1) Logout is available for All Roles.

(2) **Click Logout** (button located in upper right hand corner of screen) to end the session.

11. **Invoice Entry – PASSPORT**

To enter a PASSPORT invoice you must be logged in as a Provider Operator, a PAA Administrator or PAA Operator working on behalf of a provider location.

**NOTE:** Changes/updates made in PIMS to a consumer will be reflected in DDE system the following day. Updates from PIMS to the DDE system are made nightly.

a) **Start New Invoice – PAA Administrator or PAA Operator Role**

The PAA shall only enter an invoice on behalf of a provider once the provider has submitted the invoice to the PIMS in paper form. At no time shall a PAA enter an invoice into the DDE application for a provider until receipt of this paper invoice.

(1) Login as PAA Administrator or PAA Operator.

(2) From the Invoices screen, **click Work as a Provider**.

(3) The first 25 rows of provider names will display.

<table>
<thead>
<tr>
<th>Username</th>
<th>PAA</th>
<th>Name</th>
<th>Company</th>
<th>email</th>
<th>Work Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>07bcasey</td>
<td>PAA 7</td>
<td>Bryan Casey</td>
<td>DaYbreak ADC &amp; Transportation</td>
<td><a href="mailto:bcasey@muskingum-valley.net">bcasey@muskingum-valley.net</a></td>
<td>-</td>
</tr>
<tr>
<td>07gswemba</td>
<td>PAA 7</td>
<td>Grant Swemba</td>
<td>Traditions of Hopeton Village</td>
<td><a href="mailto:gswemba@ncr.org">gswemba@ncr.org</a></td>
<td>-</td>
</tr>
<tr>
<td>07hshaw</td>
<td>PAA 7</td>
<td>Honey Shaw</td>
<td>Traditions of Hopeton Village</td>
<td><a href="mailto:hshaw@ncr.org">hshaw@ncr.org</a></td>
<td>-</td>
</tr>
<tr>
<td>07tzickafoose</td>
<td>PAA 7</td>
<td>Teri Zickafoose</td>
<td>Traditions of Hopeton Village</td>
<td><a href="mailto:tzickafoose@ncr.org">tzickafoose@ncr.org</a></td>
<td>-</td>
</tr>
</tbody>
</table>

(4) **Click Next** to display the next series of rows, **click Previous** to go back a series of rows.

(5) **Click a column heading to sort in ascending or descending order.** In DDE portal, all reports that appear as a hyperlink can be “clicked” to sort on that column.
11. Invoice Entry (cont’d.)

a) Start New Invoice – PAA Administrator or PAA Operator Role (cont’d.)

(6) To search for a Provider:

i. **Enter a search string** in the Search Text text-box.

ii. **Click Search.** The search results will highlight your search text for easy identification of the match.

iii. Select a name from the list that populates by clicking on the user’s name in the “Username” column. If necessary, **click Clear** to clear the text box and to start a new search.

![Search Text Box]

<table>
<thead>
<tr>
<th>Username</th>
<th>PAA</th>
<th>Name</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>11mdixon</td>
<td>PAA 11</td>
<td>Mary Dixon</td>
<td>Humility House</td>
</tr>
<tr>
<td>11mdixonmarion</td>
<td>PAA 11</td>
<td>Mary Dixon</td>
<td>Marian Living Center at the Assumption Village</td>
</tr>
</tbody>
</table>

(7) **Select a name.** The application will indicate the Username you are working on behalf of. *Welcome 6dbrownoper, you are registered as a PAA Operator working on behalf of 6adiini*

(8) **Click Start a New Invoice** and go to Section 11. c) Enter Invoice Details – All Roles.

(9) **Click Work As Myself** to log out of the provider location you are working on behalf of.

b) Start New Invoice – Provider Operator Role

(1) Login as Provider Operator.

(2) **Click Start a New Invoice** and go to Section 11. c) Enter Invoice Details – All Roles.

c) Enter Invoice Details – All Roles

(1) User is logged in as a Provider Operator, a PAA Admin or PAA Operator working on behalf of a provider location.
(2) From the Invoices screen, click **Start a New Invoice**. The blank Invoice Entry screen appears.

i. The invoice screen has the following fields
   1. Invoice 
   2. Invoice Comments
   3. Consumer(s)
   4. Service Code
   5. PassThru
      a. Do not alter, it will fill itself in when you select a service code
   6. Units/Amount
      a. Depending on the service code, you can enter whole numbers for Units and $\_\_cc for dollars and cents
   7. Comment about this line item
      a. Comments about this particular service

Contextual help is available here and in all places where a in a circle appear with the DDE portal.

Help is scoped to the nearest text-box or to the “pane” the feature supports. Clicking on help by consumers explains how to use the text-box to manage your consumer(s).

Clicking on the in the Service Dates "pane" shows help on how to manage the service dates for the selected consumer(s). [More on that to follow]
### 11. Invoice Entry (cont’d.)

c) Enter Invoice Details – All Roles (cont’d.)

(3) **Invoice #:** Enter an invoice number. Character limit is 10 characters.

(4) **Invoice Comments:** If necessary, enter a comment to describe the invoice.

(5) **Consumer:** The consumer selection box essentially works like adding people to the “TO:” section of modern email clients like Outlook, gmail and such. As you start to type a portion of a name or consumer number, all matching consumers are returned. The more characters you type, the stronger the match, the less consumers appear.

i. Start typing the consumer’s first name, last name or consumer ID. Use whatever name or number that your location uses to identify your consumer.

   ▪ An “A” after a name is a consumer with an active Service Plan. These are sorted first.
   ▪ A “D” after a name is a consumer with an Inactive Service Plan.

ii. To **select individual an consumer**, hit enter or click the consumer with the mouse button. If more than one consumer matches your search, you can use the mouse or up/down arrow keys on your keyboard to move the desired consumer, then hit enter or mouse click to select them.

If more than one consumer matches your search, mouse click to select them, or use the arrow keys and hit enter.

<table>
<thead>
<tr>
<th>Consumer(s)</th>
<th>Service Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adkins, Robert</td>
<td>1072075</td>
</tr>
<tr>
<td>Bevans, Joseph</td>
<td>1545054</td>
</tr>
<tr>
<td>Bishop, Anna</td>
<td>359009</td>
</tr>
<tr>
<td>Booth, Nadal</td>
<td>1254276</td>
</tr>
<tr>
<td>Cattell, Barbara</td>
<td>1619894</td>
</tr>
</tbody>
</table>

iii. You cannot **select a range** (group) of consumers. You must select users one at a time. After each time you mouse click or hit enter for a selected user, the search resets back to a blank value, so you can just start typing the next consumer’s name or consumer ID to locate and add them to the list.

Example: Type “b”, Get “Bevans”, “Booth”, “Bishop” and “Barbara” back in the results. Select “Booth” using mouse or arrow keys + Enter. The full entry for “Booth, Nadal 1254276 -A” is added to your consumer list. Immediately type “c” and “Cattell, Barbara” and other consumers with “c” in their name will appear.
(6) **Service Code**: The service code selection box can be used as a drop-down (select list) or as an interactive search.

i. **Click the Service Code drop-down icon** to see the list of available Service Codes.

ii. Select only one Service Code.

iii. **Click Submit**.

OR

iv. **Use auto complete feature.** Type the first characters(s) of service code description or service code number. Select service code from list that populates. Displayed will be a description of service code, unit of measure, service code number and if it is a Passthru or not – @N or @Y. In this example, start typing "T" to look up T1019UA

11. **Invoice Entry (cont'd.)**

c). Enter Invoice Details – All Roles (cont’d.)

(7) **Passthru**:

i. User should not change Passthru code. Value is based on Passthru value of the Service Code selected.

(8) **Units/Amount**:

i. When the service code is a non-passthru (Passthru = N), **enter a whole number** (positive or negative). Amounts do not appear for non-passthru services. Amounts will be applied when the PASSPORT agency receives the invoice.
ii. When the service code is a passthru (Passthru = Y), enter appropriate dollar amount for the passthru services.

![Passthru Form](image)

iii. If an incorrect value is entered, an error message will appear:

![Error Message](image)

(9) **Service Date(s):**

i. At least one Service Date must be selected from the calendar.

![Service Calendar](image)

The calendar has help available from the “How do I manage my service dates?” link and as throughout the DDE portal, from the nearest

To select a date of service, hover over the word “Add” in the desired date and mouse click to activate. You must be directly over at least one of the letters in the word to activate it. A gloved hand will appear when you are directly hovering above the activation words in the calendar.

When you click “Add”, that day of the month will switch to “Serviced” and be green in color.

To remove a data of service, perform the mouse click action on the word “Serviced” and the day will return back to having an “Add” option.
11. **Invoice Entry (cont’d.)**

c). Enter Invoice Details – All Roles (cont’d.)

(9) Service Date(s) (cont’d.)

ii. Click Previous to display the previous month, click Current to display the current month and click Next to display the next month.

![Service Date(s)](image)

iii. Date(s) can be selected by:
   - Clicking the “Add” option under the date to select an individual day or days

iv. Date(s) can be de-selected by:
   - Clicking the “Serviced” option on the individual date(s)

(10) **Comment about this line item:** If necessary, type a comment about this service code. Limit of 512 characters. A character counter is provided for your convenience.

![Comment about this line item](image)

(11) **Add Service(s):**

i. **Click Add Service(s),** After consumer(s), service code, date(s) and comments are selected/entered.

ii. This will populate the Detail Lines section and a confirmation will be generated by the system: Detail record(s) added successfully.

iii. Once Add Service(s) is clicked, an invoice draft is automatically saved in the system and added to the “Invoices in Progress” list, and remains in “Invoices in Progress” status until submitted.
(12) **Detail Lines:**

i. Invoice Detail Lines section is group and sorted by consumer.

ii. For performance purposes, 200 rows is the maximum number of detail lines that will display during invoice entry.

11. **Invoice Entry (cont’d.)**

c). Enter Invoice Details – All Roles (cont’d.)

(12) **Detail Lines (cont’d.)**

i. **Click “View All Rows” button** to see all Detail Lines for the invoice. This will take you to another screen displaying all details for the invoice. This allows you to view all of the invoice detail at one time. This view is also available for you to print paper version of the invoice for your convenience.

(13) Repeat steps (5) thru (11) to bill for additional service(s) for a consumer(s) on same invoice.

d) **Next steps – All Roles**

(1) **Submit the invoice.** Proceed to Section 13. Submit Invoice.

    OR

(2) **Edit the invoice** before submitting. Proceed to Section 12. Edit or Delete an Invoice.

    OR

(3) **Stop and finish the invoice later.** Once Add Service(s) is clicked or when an action/modification is made to the invoice, an invoice draft is saved and added to the “Invoices in Progress” list. Proceed to Section 15. Invoice Status Views.

    OR

(4) **Delete the invoice,** if it was started it error. If necessary, edit the invoice (see Section 12) and **click Remove Invoice.**
12. Edit or Delete an Invoice

Only invoices in progress can be edited or deleted. User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location.

a) Remove/Delete Invoice

**NOTE**: A deleted invoice cannot be recovered.

1. Click Invoices to display the Invoices Status screen.
2. Select invoice to be deleted from the “Invoices in Progress” table.
3. Click Remove Invoice.

(4) Click Ok. You will return to the Invoice screen. You will have to acknowledge or cancel the request to remove the invoice from the system. It will be deleted and there is no recovery of a deleted invoice.

b) Detail line Row Count

(1) The first 15 rows of billing detail is displayed.
(2) **Click Next** to display the next 15 rows. **Click Previous** to show the previous 20 rows.

(3) Click the row count drop down to display additional rows. For performance purposes, a maximum of 200 rows will be displayed.

(4) To view all rows, **click View All Rows**. **Click Edit this Invoice** to return to the Invoice.
12. **Edit or Delete** an Invoice (cont'd.)

c) **Search Detail Lines**

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be searched from the Invoices in Progress table.

(3) In the Detail Line section, **enter text or date in the Search text box** and hit Enter. The Client, Date and Service Code Info columns will be searched.

(4) **Click Search.** The system will return the result of the search. Matches will be highlighted in red text where applicable.

(5) **Click Clear** to clear out the search results and display all detail lines of the invoice.
d) **Edit Units** – PASSPORT Invoice

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

(3) In the Detail line section of the invoice, **click Update checkbox** for the specific line/consumer.

<table>
<thead>
<tr>
<th>Edit</th>
<th>Delete</th>
<th>Client</th>
<th>Date</th>
<th>Service Code Info</th>
<th>PT</th>
<th>Update</th>
<th>Units</th>
<th>Amount Billed</th>
</tr>
</thead>
<tbody>
<tr>
<td>edit</td>
<td></td>
<td>Adkins, Robert - 1072075</td>
<td>26-MAY-19</td>
<td>PASSPORT - Personal Care - T1019UA</td>
<td>N</td>
<td></td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td>edit</td>
<td></td>
<td>Adkins, Robert - 1072075</td>
<td>27-MAY-19</td>
<td>PASSPORT - Personal Care - T1019UA</td>
<td>N</td>
<td></td>
<td>1</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

(4) In the New Unit(s) text box, **enter revised value**.

(5) **Click Update Units/Rate for Checked Lines**.

(6) Confirmation will be generated by the system: Changes to Units/Rate for selected Consumers were made as requested. The change(s) will be reflected in the Detail lines section.

12. **Edit or Delete** an Invoice *(cont’d.)*

e) **Edit Rates** – PASSPORT Invoice

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

(3) Only rates for service code with Y = Passthru can be changed.

(4) In the Detail line section of the invoice, **click Update checkbox** for the specific line/consumer.

<table>
<thead>
<tr>
<th>Edit</th>
<th>Delete</th>
<th>Client</th>
<th>Date</th>
<th>Service Code Info</th>
<th>PT</th>
<th>Update</th>
<th>Units</th>
<th>Amount Billed</th>
</tr>
</thead>
<tbody>
<tr>
<td>edit</td>
<td></td>
<td>Worthington, Carol - 47658B</td>
<td>26-SEP-08</td>
<td>PASSPORT - Minor Home Modification - S5165UA</td>
<td>Y</td>
<td></td>
<td>1</td>
<td>$737.50</td>
</tr>
</tbody>
</table>

(5) In the New Rate text box, **enter revised value**.

(6) **Click Update Units/Rate for Checked Lines**.
(7) Confirmation will be generated by the system: Changes to Units/Rate for selected Consumers were made as requested. The change(s) will be reflected in the Detail lines section.

<table>
<thead>
<tr>
<th>Edit</th>
<th>Delete</th>
<th>Client</th>
<th>Date</th>
<th>Service Code Info</th>
<th>PT</th>
<th>Update</th>
<th>Units</th>
<th>Amount Billed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Worthington, Carol - 478388</td>
<td>26-SEP-08</td>
<td>PASSPORT - Minor Home Modification - 5S165UA</td>
<td>Y</td>
<td></td>
<td>1</td>
<td>$801.87</td>
</tr>
</tbody>
</table>

f) **Edit an Individual Detail Line** – PASSPORT Invoice

Only these fields can be changed: Invoice comments, service code, units/amount, service date and comment about this line item. Passthru and client/consumer cannot be changed.

(1) **Click Invoices** to display the Invoices Status screen.
(2) **Select invoice** to be edited from the Invoices in Progress table.

12. **Edit or Delete an Invoice (cont’d.)**

f) Edit an Individual Detail Line – PASSPORT Invoice (cont’d.)

(3) In the Detail line section of the invoice, **click Edit** next to the individual client/line.
(4) Details for the individual consumer/line will appear.

(5) As necessary, make changes to Invoice Comments, Service Code, Units/Amount, Service Date and Comment about this line item.
   i. Click **Apply Changes** to apply updates.
   ii. Click **cancel** any changes/updates.

(6) The system will return a confirmation: Changes were applied to the selected detail line.

13. Submit Invoice

A submitted invoice cannot be deleted or edited. User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location.

(1) Once all charges are entered and edits/changes confirmed, **click Submit Invoice**.

(2) **Click Ok** at the this dialog box.

By clicking on 'Ok' below, you certify that the information contained in this invoice is accurate to the best of your knowledge, and that all units of service reported herein were provided in accordance with the conditions of this contract.

(3) **Click Cancel** to cancel the submit invoice process. User is brought back to the Invoice Information screen.
(4) System generates a confirmation: 'The invoice has been successfully "Submitted" to the ODA PIMS system.' The details of the invoice will display.

(5) As necessary, Generate Cover Sheet. See Section 14. Generate a Coversheet.
14. Generate a Coversheet

ODA does not have a requirement for a signed cover sheet and collecting a cover sheet from a provider is the discretion of the PAA. The Generate a Coversheet button becomes active once an invoice has been submitted.

a) User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location and invoice has been submitted.

b) If necessary, **click Invoices** to display the Invoices Status screen.

c) **Select invoice** from the Invoices Status list.

d) **Click Generate a Coversheet** to create the PASSPORT Invoice for Direct Services or Choices Invoice For Direct Services coversheet.
e) Use your browser’s Print utility to send the document to a printer or print to PDF. The options here vary with your browser. Locating a printer or output device for your browser is not an Ohio Department of Aging supported feature. Please use internet search or your local IT support if you experience difficulty with selecting a printer or output device.

f) Click back button on your browser to return to the submitted invoice details. This is the only way to exit the coversheet screen and return back into the DDE portal.
15. Invoice Status Views

- User is logged in as a PAA Administrator, PAA Operator or Provider Operator, or a PAA Administrator or a PAA Operator working on behalf of a provider location.
- The PAA Administrator and PAA Operator Roles can view all invoices and view Provider invoices by working on behalf of a provider location. The Provider Operator's view is limited to their Authorized Location(s).
- **Click Invoices** to display the Invoice Status screen.

a) Invoices by Status score card

- The Invoices by Status scorecard is displayed at the bottom of every Invoice View. If no invoices are found, then “no data found” will be displayed.
- The table will list the status of all invoices for the PAA Administrator and PAA Operator Roles.
- The table for the Provider Operator Role will list the status of all invoices for their Authorized Location(s).
- The Fiscal Intermediary's view is limited to CHOICES invoices.

<table>
<thead>
<tr>
<th>Type</th>
<th>Invoice Status</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIMS</td>
<td>Invoices in Progress</td>
<td>1362</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices Submitted to ODA</td>
<td>3</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices Received by ODA</td>
<td>479</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices with Remittance Advice</td>
<td>3867</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices Under Review with Remittance Advice</td>
<td>3321</td>
</tr>
<tr>
<td>Choices</td>
<td>Invoices in Progress</td>
<td>32</td>
</tr>
<tr>
<td>Choices</td>
<td>Invoices with Remittance Advice</td>
<td>17</td>
</tr>
<tr>
<td>Choices</td>
<td>Invoices Under Review with Remittance Advice</td>
<td>9</td>
</tr>
</tbody>
</table>
b) **Invoice Views Available**

- **Invoices Received by ODA** – Displays invoices received by ODA PIMS/PASSPORT system.
- **Invoices Submitted to ODA** – Displays invoices sent to ODA PIMS/PASSPORT, but not acknowledged as received.
- **Invoices Under Review** – Displays invoice under review by an ODA agent or a process. No remittance available.
- **Invoices Under Review with Remittance Advice** – Displays invoices under review by an ODA agent or a process. Remittance advice available for a portion of the invoice.
- **Invoices In Progress** – Displays invoices in progress—not submitted to ODA. The user is able to select an invoice and make edits and changes. Invoices stay in progress until submitted.
- **Invoices with Remittance Advice** – Displays invoices paid with remittance advice available in DDE. The data is generated from the remittance advice report in PIMS.
- **Rejected Invoices** – Displays invoices rejected in full by case manager.
15. **Invoice Status Views (cont’d.)**

c) **Filter the List – Submitted Invoices only**

   (1) **Click Invoice Status drop down arrow** and **select** an Invoice Status to be viewed. **NOTE:** This filter does not apply to Invoices in Progress.

   ![Invoice Status Drop Down Arrow]

   (2) **Click** the **Calendar** icon to display the calendar.

   (3) **Select a date.**

      i. **Click** the forward/back icons to go forward/back a month

      ii. **Or** **click** the drop down arrow next to the month or year to change the month or year.

      iii. **Select** a date. (Click **Close** to close the dialog box without changing the date.)

   ![Calendar View]

---

[Image 126x542 to 444x650]

[Image 126x151 to 592x425]
(4) Click **Go**. A filtered list will display based on the date selected. Filter Result Example:

<table>
<thead>
<tr>
<th>Type</th>
<th>Invoice Status</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIMS</td>
<td>Invoices in Progress</td>
<td>1362</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices Submitted to ODA</td>
<td>3</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices Received by ODA</td>
<td>479</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices with Remittance Advice</td>
<td>3867</td>
</tr>
<tr>
<td>PIMS</td>
<td>Invoices Under Review with Remittance Advice</td>
<td>3321</td>
</tr>
<tr>
<td>Choices</td>
<td>Invoices in Progress</td>
<td>32</td>
</tr>
<tr>
<td>Choices</td>
<td>Invoices with Remittance Advice</td>
<td>17</td>
</tr>
<tr>
<td>Choices</td>
<td>Invoices Under Review with Remittance Advice</td>
<td>9</td>
</tr>
</tbody>
</table>

(5) Click a column heading to sort data in ascending or descending order.

(6) Click an invoice number to view the details or to finish an invoice in progress.
16. Reports

- The PAA Administrator and PAA Operator Roles can display all Passport and Choices invoices and Choices Provider List for their site. The PAA Administrator and PAA Operator Roles must work on behalf of a provider to display the Consumer List, Services List and to Download EDI reports. The PAA Administrator can view usage stats.
- The Fiscal Intermediary Role display is limited to Choices reports and Choices consumer, service and provider lists.
- The Provider Operator Role display is limited to their authorized location(s).
- The Provider Operator Reports Only Role display is limited to Download EDI Reports for their authorized location(s).

<table>
<thead>
<tr>
<th>Reports Screen</th>
<th>Invoice Report</th>
<th>Consumer List</th>
<th>Services List</th>
<th>Choices Provider List</th>
<th>Download EDI Reports</th>
<th>Usage stats</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAA Administrator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>PAA Operator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Fiscal Intermediary</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provider Operator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provider Operator Reports Only</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a) Invoice Report

(1) **Click Reports.** A list of invoices displays showing Invoice Number, Provider name, Provider Location ID, Status, Inv Received Date, Details Lines and Invoice Total. The options available on this screen are based on your role in DDE.

(2) Click a column heading to sort data in ascending or descending order.

(3) The first 30 rows displays. Click Next to display the next 30 rows. Click Previous to go back 30 rows.
16. Reports (cont’d.)
   a) Invoice Report (cont’d.)

   (4) Search for an Invoice:
   
   i. **Enter search string** in the Search text box. Invoice Number, Agency, Location ID, Status and Received Date are searched.

   ii. **Click Search.** The results of the search display. Click Reset to display the entire list and clear the text box.

   iii. **Select an invoice** to display the Invoice information, Details Lines and to Generate a Coversheet. Click the browser’s back button to go back to the Invoice Report List.

   (5) Status Column displays current status of the invoice.

   - **Rcvd by ODA** – Invoice received by ODA PIMS/PASSPORT system.
   - **REMIT** – Invoice was submitted and adjudicated in PIMS. A Remittance Advice (RA) was created and available for download on the Download EDI Reports page. The Download EDI Reports page displays reports available for download for the last 90 days.
   - **REMIT W/ERR** – Invoice was submitted to PIMS and a RA was created, but at least one billable was adjusted or denied during adjudication. To find adjusted or denied claim, download the RA report (for the invoice in question) from the Download EDI Reports page. The Download EDI Reports page displays reports available for download for the last 90 days.
   - **SUBMITTED** – Invoice sent to ODA PIMS/PASSPORT, but not acknowledged as received.
   - **WIP** (Work in Progress) – Invoice in progress, but not submitted to ODA. User is able to select and edit invoice. Invoices stay in WIP until submitted.

   b) Consumer List – PASSPORT

   (1) User is logged in as Provider Operator, Fiscal Intermediary or a PAA Administrator/PAA Operator working on behalf of a Provider Operator to view the Consumer List.

   (2) **Click Consumer List.** A report of Consumers specific to the location ID will display.
b) Consumer List – PASSPORT (cont’d.)

(3) Show Passport Consumers: The “Show Passport Consumers” is selected by default and Passport Consumers display. Consumer Name, Consumer No., Address, City, State and Zip displays.

(4) If no consumers are found, the system will display: No Consumers found for this Agency.

(5) Click a column heading to sort data in ascending or descending order.

(6) The first 15 rows displays. Click Next to display the next 15 rows. Click Previous to go back 15 rows. Click Row to display up to 10,000 rows.

(7) To download the report, click “Click here to download your Consumer List to a spreadsheet as a CSV file.” CSV = Comma Separated Values. Follow the browser’s download instructions to open with Microsoft Excel or save to Disk.

<table>
<thead>
<tr>
<th>Consumer Name</th>
<th>Consumer No.</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baughman, Willma Kathleen</td>
<td>1158063</td>
<td>444 Cherry Sreet, 203-A</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
<tr>
<td>Burkitt, Nancy Lou</td>
<td>1466867</td>
<td>444 Cherry Street, 209-A</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
<tr>
<td>Humphrey, Joanne</td>
<td>1809455</td>
<td>444 Cherry St Rm 110-A</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
<tr>
<td>Jordan, Lloyd L</td>
<td>592305</td>
<td>444 Cherry St Unit 114</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
<tr>
<td>Mealey, Gail Shirley</td>
<td>1090840</td>
<td>444 Cherry St., Unit 211</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
<tr>
<td>Patrick, Sylvia</td>
<td>1171932</td>
<td>444 Cherry Street</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
<tr>
<td>Robinson, Opal C.</td>
<td>728919</td>
<td>444 Cherry St Unit 126</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
<tr>
<td>Shumate, Lowell Donnelly</td>
<td>1731629</td>
<td>444 Cherry Street, 211-A</td>
<td>Waverly</td>
<td>OH</td>
<td>45690</td>
</tr>
</tbody>
</table>

Click here to download your Consumer List to a spreadsheet as a CSV file
16. Reports (cont’d.)

   c) Services List – PASSPORT

   (1) User is logged in as Provider Operator or a PAA Administrator/PAA Operator working on behalf of a Provider Operator.

   (2) **Click Services List.** A report, specific to the location ID, of Passport Services listing the Service Code and Description will display.

   

<table>
<thead>
<tr>
<th>Service Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S5101UA</td>
<td>PASSPORT - Enhanced ADS - 1/2 day</td>
</tr>
<tr>
<td>S5102UA</td>
<td>PASSPORT - Enhanced ADS - day</td>
</tr>
<tr>
<td>T2003UA</td>
<td>PASSPORT - ADS Trans - 1 way</td>
</tr>
<tr>
<td>T2025UAU5</td>
<td>PASSPORT - ADS Trans - round trip</td>
</tr>
</tbody>
</table>

   (3) Click a column heading to sort data in ascending or descending order.

   (4) The first 15 rows displays. **Click Next** to display the next 15 rows. **Click Previous** to go back 15 rows. Click Row to display up to 10,000 rows.

   (5) To download the report, click “**Click here to download your Services List to a spreadsheet as a CSV file.**” CSV = Comma Separated Values. Follow the browser’s download instructions to open with Microsoft Excel or save to Disk.
16. Reports (cont’d.)

d) Download Electronic Data Interchange (EDI) Reports

(1) User is logged in as Provider Operator, Provider Operator Reports Only or PAA Administrator/ PAA Operator working on behalf of a Provider Operator. Fiscal Intermediary role cannot download EDI reports.

(2) A table of reports available for download for the last 90 days will display.

(3) Reports are in PDF format and Adobe Reader is needed in order to open the file. If Adobe Reader is not installed, click Get Adobe Reader to download and install the latest version of Adobe Reader on your operating system.

(4) 16. Reports (cont’d.)

e) Download EDI Reports (cont’d.)

(5) Click Download EDI Reports. A table of reports available for download for the last 90 days will display.

Show All  Activity Summary  Remittance Advice  Reports by Type (last 90 days)

Activity Summary

<table>
<thead>
<tr>
<th>Time Stamp</th>
<th>Invoice ID - or- Filename</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019/05/20 16:55</td>
<td>MARAPR2019</td>
</tr>
<tr>
<td>2019/03/18 18:55</td>
<td>JAN&amp;FEB19</td>
</tr>
</tbody>
</table>

1 - 2

Remittance Advice

<table>
<thead>
<tr>
<th>Date</th>
<th>Invoice ID -- RA Filename</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019/05/28 10:29</td>
<td>MARAPR2019 - RA150396791.pdf</td>
</tr>
<tr>
<td>2019/03/27 09:05</td>
<td>JAN&amp;FEB19 - RA150388733.pdf</td>
</tr>
</tbody>
</table>

1 - 2

Remittance Advice may contain information for more than one invoice.

Reports by Type (last 90 days)

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Summary</td>
<td>1</td>
</tr>
<tr>
<td>Remittance Advice</td>
<td>2</td>
</tr>
<tr>
<td>Report Total:</td>
<td>3</td>
</tr>
</tbody>
</table>
(6) Reports Available for Download

- **Reports by Type (last 90 days)** – Displays a scorecard of total reports available for download for the last 90 days.
- **Activity Summary** – Status of report of invoices submitted.
- **Claims Acknowledgment** – Report of rejected claims.
- **Remittance Advice** – Remittance Advice reported generated from PIMS

**16. Reports (cont’d.)**

d) Download Electronic Data Interchange (EDI) Reports (cont’d.)

(7) Search for a Report

i. In the “Optional Search Criteria” text box, **enter a search string** that is contained in the Invoice ID or Date timestamp.

ii. Click **Search**. The results of the search will display.

![Search Form](image)

Reports

<table>
<thead>
<tr>
<th>Activity Summary</th>
<th>Remittance Advice</th>
<th>Reports by Type (last 90 days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Stamp</td>
<td>Invoice ID -or- Filename</td>
<td></td>
</tr>
<tr>
<td>2019/03/18 18:55</td>
<td>JANAFEB19</td>
<td></td>
</tr>
</tbody>
</table>

i. **Click Clear** to clear the search text box and display all available reports.

(8) Open a Report

i. The reports are in PDF format. In order to open/view the report, Adobe Reader must be installed.

ii. Click **Filename** of the report.

iii. Follow the browser’s instructions to either Open or Save the report.

e) **Usage Stats**

The Usage Stats function is specific to the PAA Administrator Role. This function is covered in detail in the PAA Administrator Role User Maintenance Manual.
17. Maintenance

a) Change My Password

(1) Click Maintenance. The Change My Password screen appears.

Change my Password

To change your password

- Enter your current password
- Enter your new password
- Confirm your password
- Hit enter or click "Apply Changes"

You are about to change the password for : abanana

Old Password

New Password

Confirm Password

(2) To change your password:
   i. Enter current password.
   ii. Enter new password.
   iii. Confirm password.
   iv. Click Apply Changes. Click Cancel to cancel change password request.

b) Change My Email Address

(1) Click Maintenance.
(2) **Click Change My Email Address.**

**Change my Email Address**

To change your email address of record

- Enter your new email address
- Confirm your email address
- Hit enter or click "Apply Changes"

You are about to change the email address for: abanana

![Email Address Input Fields]

(3) To change your email address:

i. **Enter new email address.**

ii. **Confirm email address.**

iii. **Click Apply Changes.** Click Cancel to cancel the change email address request.
17. Maintenance (cont’d).

c) Research Assistant

- Research Assistant function is specific to the PAA Administrator and PAA Operator Roles.
- Use the Research Assistant tool to display a list of all Service Codes, including Service Begin and End Date, the Consumer has on file in the DDE application as of the current day.
- Data is based on the information the consumer has on record in PIMS.
- Changes/updates made in PIMS for a consumer will be reflected in the DDE system the following day. Updates from PIMS to the DDE system are made nightly.

1. Click Maintenance
2. Click Research Assistant.
3. In the Search dialog box, enter a consumer number and click Search.

(1) Client Number: 1072075

d) User Maintenance and Email Lists

User Maintenance and Email Lists functions are specific to the PAA Administrator Role. These functions are covered in detail in the PAA Administrator Role User Maintenance Manual.