

Direct Data Entry

User Manual

Rev 9 – 06/27/2019

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Direct Data Entry (DDE) User Manual

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01/04/2007	2.0	Program Changes	ODA IT Dept.	C. Brickner
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Direct Data Entry (DDE) User Manual

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.



This is the live/production URL for the DDE Application

You are logging into the live production website for the Ohio Department of Aging's DDE online invoice entry application.

Internet Explorer v10 OR NEWER users, PLEASE choose Compatibility View from the Tools menu to use DDE.

This system will be offline for approximately 30 minutes beginning at 11:15pm Monday thru Saturday and again at 1am Saturday.

Welcome to the Ohio Department of Aging. Please enter your username and password to log into the Invoicing system.

User Name ?

Password ?

- 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.

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- 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  

Password  

**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.

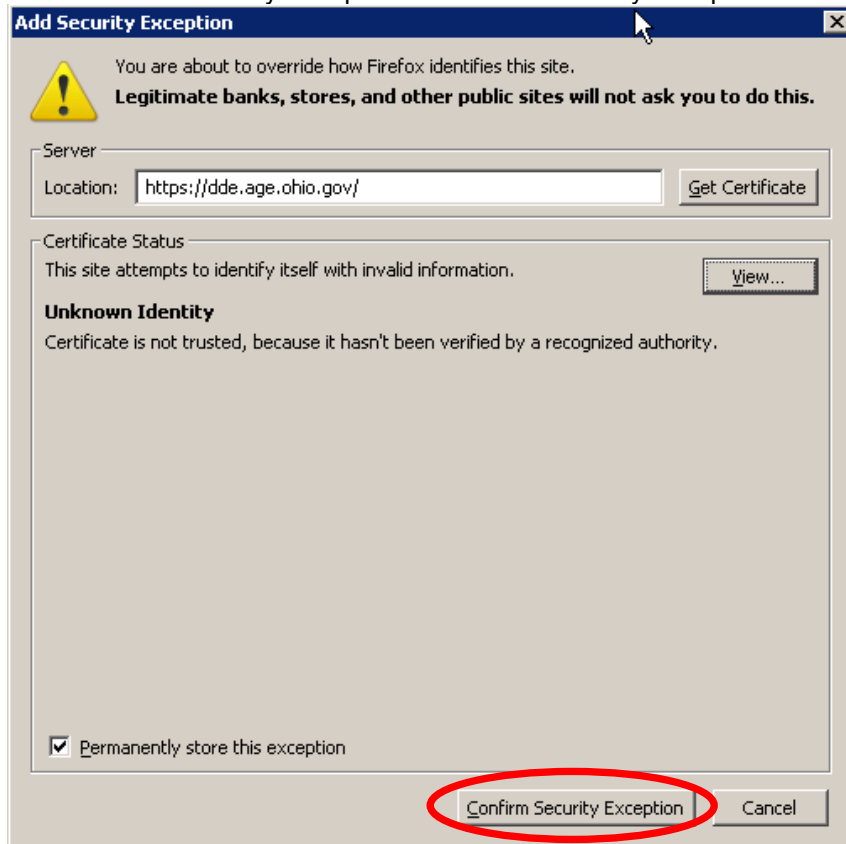
- (2) Click "I Understand the Risks."



- (3) Click "Add Exception."



- (4) Click "Confirm Security Exception" at the Add Security Exception screen.

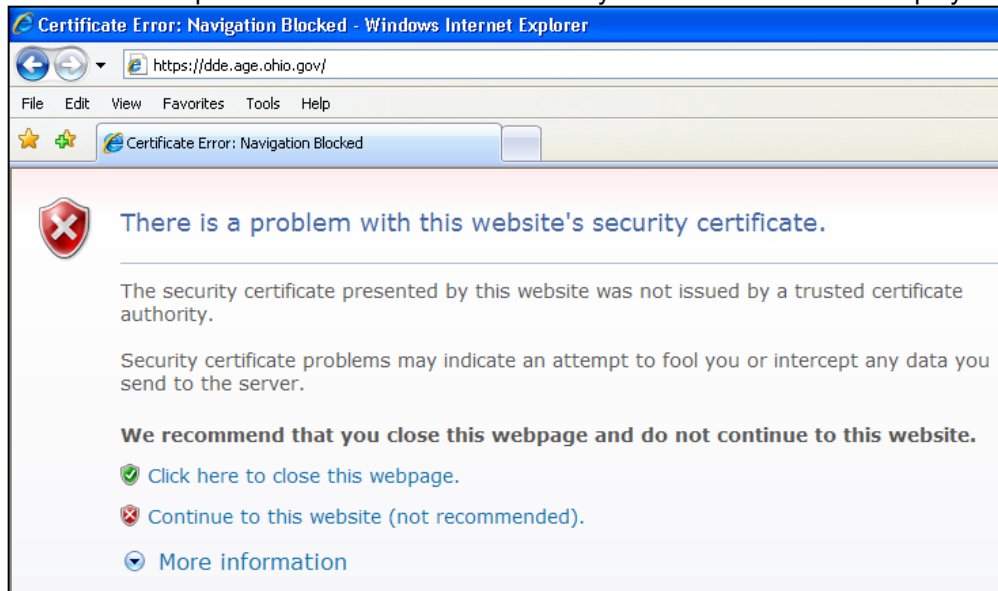


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4. Security Certificate (cont'd.)

b) Internet Explorer

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



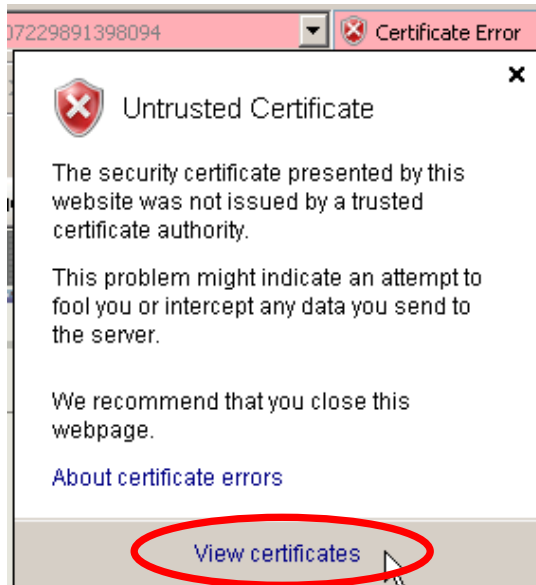
- (2) Click “Continue to this website.”



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



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

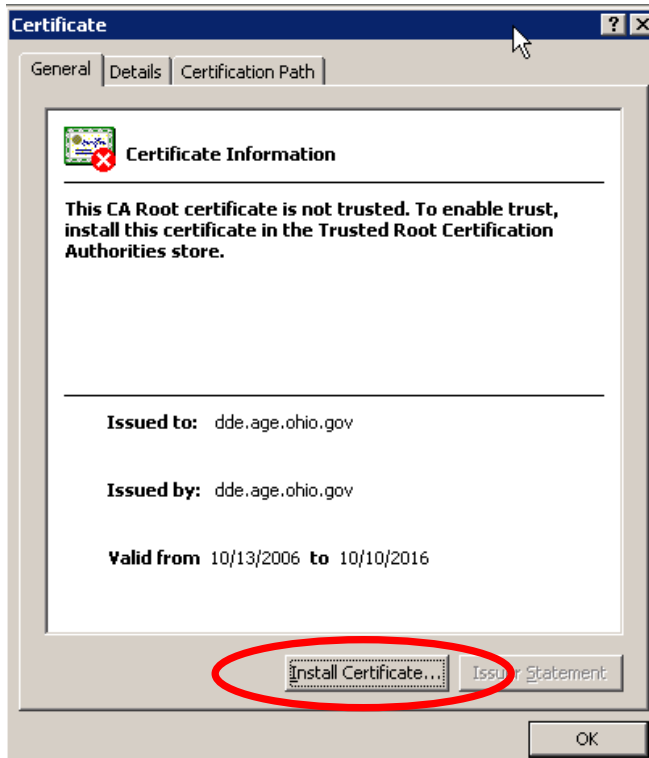


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4. Security Certificate (cont'd.)

b) Internet Explorer (cont'd.)

(5) Click "Install Certificate" at the Certificate window.

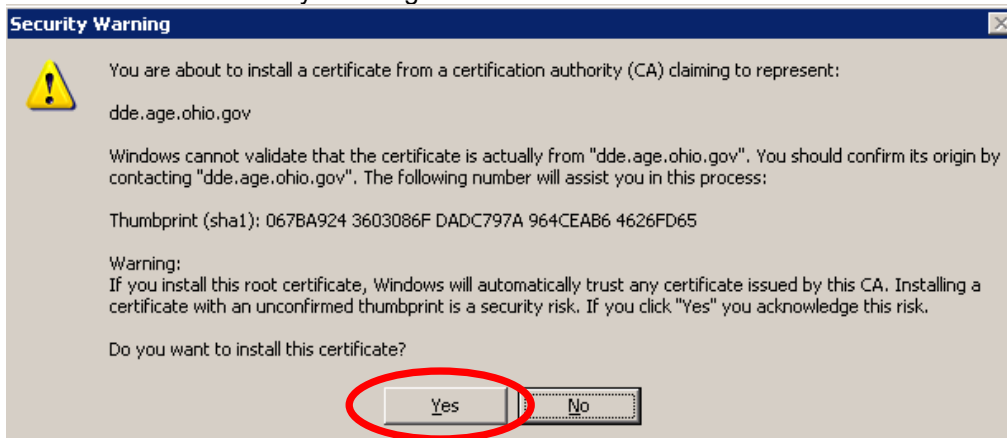


(6) Click "Next" at the Certificate Import Wizard window.

(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.

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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.

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10. Menus

a) Invoices Screen

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

Invoices Screen	Invoice Status	Choices Invoice Entry	Work As a Provider
PAA Administrator *	X	X **	X
PAA Operator *	X	X **	X
Fiscal Intermediary	X	X **	
Provider Operator	X	X ***	

* 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.

Reports Screen	Invoice Report	Consumer List	Services List	Choices Provider List	Download EDI Reports	Usage stats**
PAA Administrator *	X	X	X	X	X	X
PAA Operator *	X	X	X	X	X	
Fiscal Intermediary	X	X	X	X		
Provider Operator	X	X	X		X	
Provider Operator Reports Only					X	

* 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.

Maintenance Screen	Change My Password	Change my Email Address	Research Assistant	Email Lists **	User Maintenance **
PAA Administrator	X	X	X	X	X
PAA Operator	X	X	X		
Fiscal Intermediary	X	X			
Provider Operator	X	X			
Provider Operator Reports Only	X	X			

** These functions are covered in detail in the PAA Administrator Role User Maintenance Manual.

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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 PAA 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.

Username ↑	PAA	Name	Company	email	Work Phone
07bcasey	PAA 7	Bryan Casey	Daybreak ADC & Transportation	bcasey@muskingum-valley.net	-
07gswemba	PAA 7	Grant Swemba	Traditions of Hopeton Village	gswemba@ncr.org	-
07hshaw	PAA 7	Honey Shaw	Traditions of Hopeton Village	hshaw@ncr.org	-
07zickafoose	PAA 7	Teri Zickafoose	Traditions of Hopeton Village	tzickafoose@ncr.org	-

- (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.

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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 users name in the "Username" column. If necessary, **click Clear** to clear the text box and to start a new search.

The screenshot shows a search interface with a text box labeled "Search Text" containing the word "mary". To the right of the text box is a question mark icon. Further right are two buttons: "Search" and "Clear". Below the search area is a table with the following columns: Username, PAA, Name, Company, and an empty column. The table contains two rows of search results.

Username	PAA	Name	Company	
11mdixon	PAA 11	Mary Dixon	Humility House	mary.dixon@t
11mdixonmarion	PAA 11	Mary Dixon	Marian Living Center at the Assumption Village	mary.dixon@t

(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 logout 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.

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(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 \$d_cc for dollars and cents
7. Comment about this line item
 - a. Comments about this particular service

The screenshot displays two panes from the DDE portal. The 'Invoice Information' pane on the left contains several fields, each marked with a blue octagon and a number corresponding to the list above. The 'Service Date(s)' pane on the right shows a calendar for June 2019. A blue arrow points from the help icon in the Service Date(s) pane to the text below.

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]

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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 stronger the match, the less consumers appear

- i. Start typing the consumers 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 mose or up/down arrow keys on your keyboard to move the desired consumer, then hit enter or mouse click to select them

Consumer(s) ?

Service Code ?

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

Consumer(s) ?

Service Code ?

PassThru

ent about this ?

line item

- 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 consumers 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.

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- (6) **Service Code:** The service code selection box can be used as a drop-down (select list) or as an interactive search.

Service Code

PassThru

Units / Amount

- 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 character(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

Service Code

PassThru

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.

PassThru

Units / Amount

(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.

PassThru

Units / Amount


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- ii. When the service code is a passthru (**Passthru = Y**), **enter appropriate dollar amount** for the passthru services.

PassThru ? Units / Amount ?

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

1 error has occurred

 • Units/Amount must be entered as whole numbers (positive or negative). Partial units (decimals or fractions) are not permitted by rule.

(9) Service Date(s):

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

Service Date(s)

[How do I manage my service dates?](#) ?

◀ ▶ today June 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
Add	Serviced	Serviced	Serviced	Add	Add	Add

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.

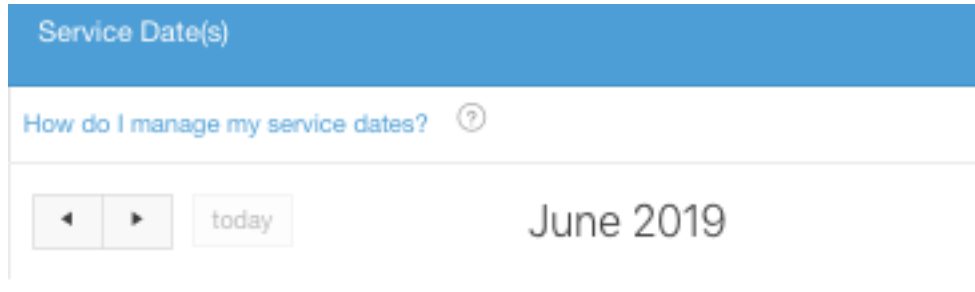
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11. Invoice Entry (cont'd.)

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

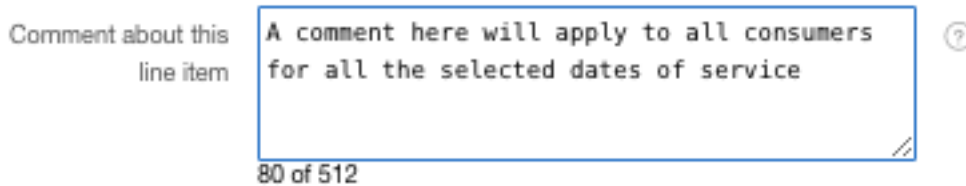
(9) Service Date(s) (cont'd.)

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



- 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.



(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.

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(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.

The screenshot shows the 'Invoice Detail' interface. At the top, there is a blue header bar with the text 'Invoice Detail'. Below this, there is a blue button labeled 'Update Units/Rate for Checked Lines'. Underneath, there are several input fields: 'New Unit(s)', 'New Rate', and 'Search'. To the right of these fields is a 'View All Rows' button. A blue arrow points from the text '200 rows is the maximum number of detail lines that will display during invoice entry.' to a dropdown menu for 'Row Count'. The dropdown menu is open, showing options: 15 (selected), 30, 50, 100, and 200. Below the dropdown, there is a table with columns: Edit, Delete, Client, Date, Service Code Info, PT, Update, Units, Amount Billed, and Comments. The table contains one row for 'Adkins, Robert - 1072075' and a 'Client Name Total' row. The page number '1 - 4' is visible in the bottom right corner.

11. Invoice Entry (cont'd.)

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

(12) Detail Lines (cont'd.)

- i. **Click “View All Rows”** 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 in error. If necessary, edit the invoice (see Section 12) and **click Remove Invoice**.

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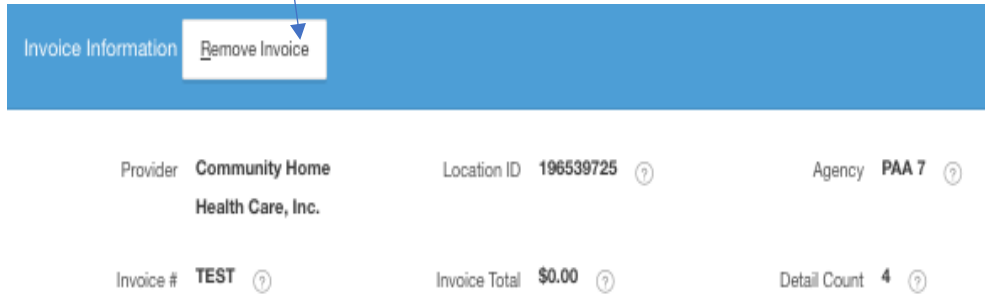
12. Edit or Delete an Invoice

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.

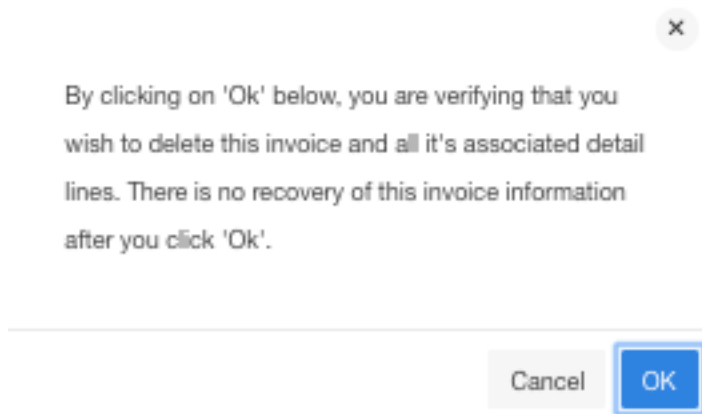
a) Remove/Delete Invoice

NOTE: A deleted invoice cannot be recovered.

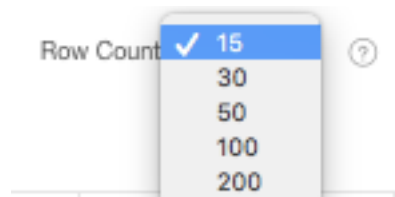
- (1) **Click Invoices** to display the Invoices Status screen.
- (2) **Select invoice** to be deleted from the "Invoices in Progress" table.
- (3) **Click Remove Invoice.**



- (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.

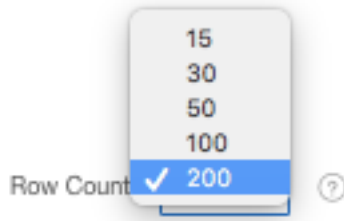
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(2) **Click Next** to display the next 15 rows. **Click Previous** to show the previous 20 rows.

Fetty, Donna - 1761242		Top of Page								
Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments	
edit	<input type="checkbox"/>	Fetty, Donna - 1761242	27-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input type="checkbox"/>	1	\$0.00	-	
edit	<input type="checkbox"/>	Fetty, Donna - 1761242	28-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input type="checkbox"/>	1	\$0.00	-	
edit	<input type="checkbox"/>	Fetty, Donna - 1761242	29-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input type="checkbox"/>	1	\$0.00	-	

1 - 15 Next ▶

(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.

Invoice Detail

Update Units/Rate for Checked Lines

Search

Clear

View All Rows

New Unit(s)

?

New Rate

?

Direct Data Entry (DDE) User Manual

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

Search ? Row Count ?

1 - 9

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
Adkins, Robert - 1072075 Top of Page									
edit	<input type="checkbox"/>	Adkins, Robert - 1072075	26-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input type="checkbox"/>	1	\$0.00	-
edit	<input type="checkbox"/>	Adkins, Robert - 1072075	27-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input type="checkbox"/>	1	\$0.00	-

- (5) **Click Clear** to clear out the search results and display all detail lines of the invoice.

New Unit(s) ?

Search ?

Direct Data Entry (DDE) User Manual

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.

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	
		Adkins, Robert - 1072075	Top of Page						
edit	<input type="checkbox"/>	Adkins, Robert - 1072075	26-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input checked="" type="checkbox"/>	1	\$0.00	
edit	<input type="checkbox"/>	Adkins, Robert - 1072075	27-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input checked="" type="checkbox"/>	1	\$0.00	

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

New Unit(s) New Rate

- (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.

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	
		Adkins, Robert - 1072075	Top of Page						
edit	<input type="checkbox"/>	Adkins, Robert - 1072075	26-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input type="checkbox"/>	32	\$0.00	
edit	<input type="checkbox"/>	Adkins, Robert - 1072075	27-MAY-19	PASSPORT - Personal Care - T1019UA	N	<input type="checkbox"/>	32	\$0.00	

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.

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	
		Worthington, Carol - 478388	Top of Page						
edit	<input type="checkbox"/>	Worthington, Carol - 478388	26-SEP-08	PASSPORT - Minor Home Modification - S5165UA	Y	<input checked="" type="checkbox"/>	1	\$737.50	

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

New Unit(s) New Rate

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

Direct Data Entry (DDE) User Manual

Update Units/Rate for Checked Lines

Search
Clear

View All Rows

(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.

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	
		Worthington, Carol - 478388							
		Top of Page							
edit		Worthington, Carol - 478388	26-SEP-08	PASSPORT - Minor Home Modification - S5165UA	Y		1	\$801.87	

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.

Edit	Delete	Client	Date	Service Code Info	PT
		Worthington, Carol - 478388			
		Top of Page			
edit		Worthington, Carol - 478388	26-SEP-08	PASSPORT - Minor Home Modification - S5165UA	Y

Direct Data Entry (DDE) User Manual

(4) Details for the individual consumer/line will appear.

The screenshot shows the 'Invoice Information' form with the following fields and values:

- Provider: Community Home Health Care, Inc.
- Location ID: 196539725
- Invoice #: TEST
- Invoice Total: \$0.00
- Invoice Comments: (Empty text area)
- Consumer(s): Adkins, Robert | 1072075 | -A
- Service Code: PASSPORT - Personal Care UOM=15 Minutes | T1019UA | @N
- PassThru: N
- Units / Amount: 32
- Service Date: 27-MAY-19
- Comment about this line item: (Empty text area)

At the bottom of the form are two buttons: 'Apply Changes' (highlighted in blue) and 'Cancel'.

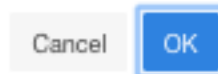
- (5) As necessary, make changes to Invoice Comments, Service Code, Units/Amount, Service Date and Comment about this line item.
 - i. **Click Apply Changes** to apply updates.
 - ii. **Click cancel** any changes/updates.
- (6) The system will return a confirmation: Changes were applied to the selected 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.

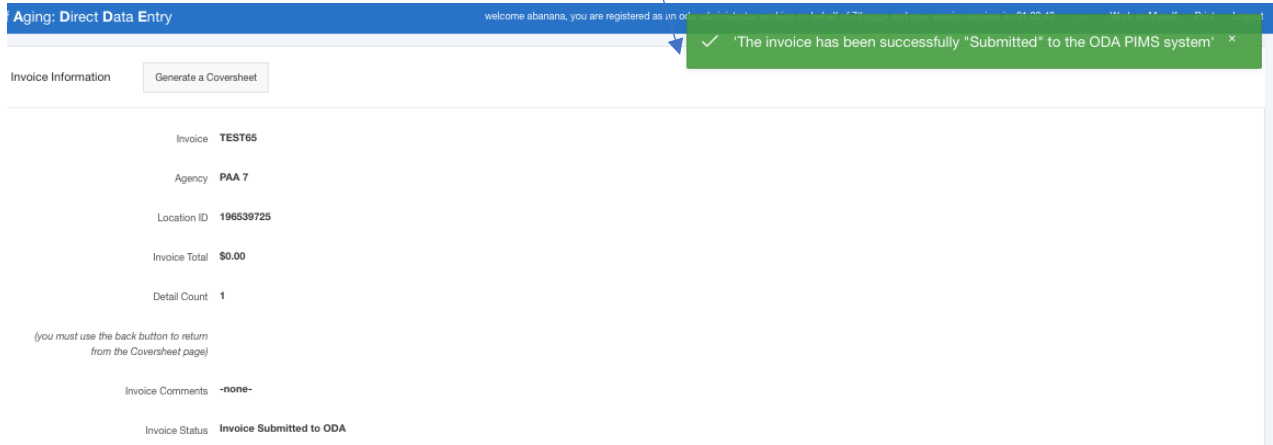
By clicking on 'Ok' below, you certify that the information contained in this invoice is accurate to the best of your knowledge, and that all units of service reported herein were provided in accordance with the conditions of this contract.



- (3) **Click Cancel** to cancel the submit invoice process. User is brought back to the Invoice Information screen.

Direct Data Entry (DDE) User Manual

- (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.



Invoice TEST65

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.

Direct Data Entry (DDE) User Manual

PASSPORT Invoice For Direct Services

Provider: Community Home Health Care, Inc. **Invoice ID:** TEST65
DBA Name: Community Home Health Care, Inc. **DDE Invoice ID:** 207768
Provider No: 196539237
Provider Location: 196539725
Agency ID: PAA 7

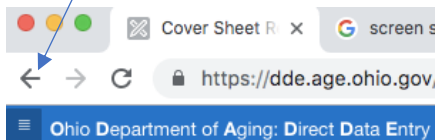
Agency Internal Use Only					
	Units	Units	Amount	Units	Amount
Service Description	Billed	Rate	Due	Paid	Due
PASSPORT - Personal Care	1 *	=			
Totals	1				

Agency Internal Use Only

Approved: _____ Date: _____ Invoice #: _____
 Document: _____ Amount: _____ Total Due: _____
 Thu 20-Jun-2019 17:15:00 DDE Version 1.1.0.3

NOTE: Any difference between Amount Due and Amount Paid the period could be the result of units that were billed in excess of authorized care plans or units being paid from previous service months that were initially denied.

- 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 you 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**



Direct Data Entry (DDE) User Manual

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.

Type	Invoice Status	Count
PIMS	Invoices in Progress	1362
PIMS	Invoices Submitted to ODA	3
PIMS	Invoices Received by ODA	479
PIMS	Invoices with Remittance Advice	3867
PIMS	Invoices Under Review with Remittance Advice	3321
Choices	Invoices in Progress	32
Choices	Invoices with Remittance Advice	17
Choices	Invoices Under Review with Remittance Advice	9

Direct Data Entry (DDE) User Manual

b) Invoice Views Available

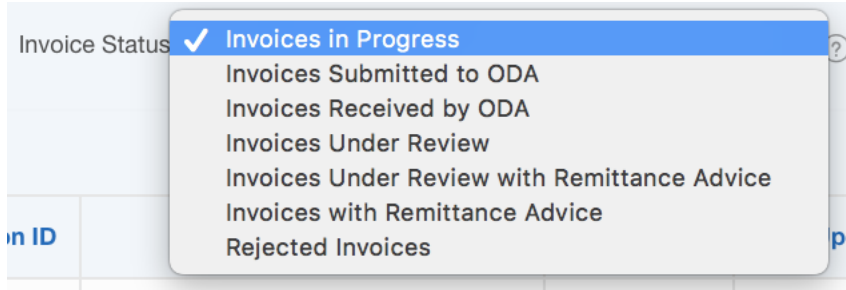
- **Invoices Received by ODA** – Displays invoices received by ODA PIMS/PASSPORT system.
- **Invoices Submitted to ODA** – Displays invoices sent to ODA PIMS/PASSPORT, but not acknowledged as received.
- **Invoices Under Review** – Displays invoice under review by an ODA agent or a process. No remittance 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.

Direct Data Entry (DDE) User Manual

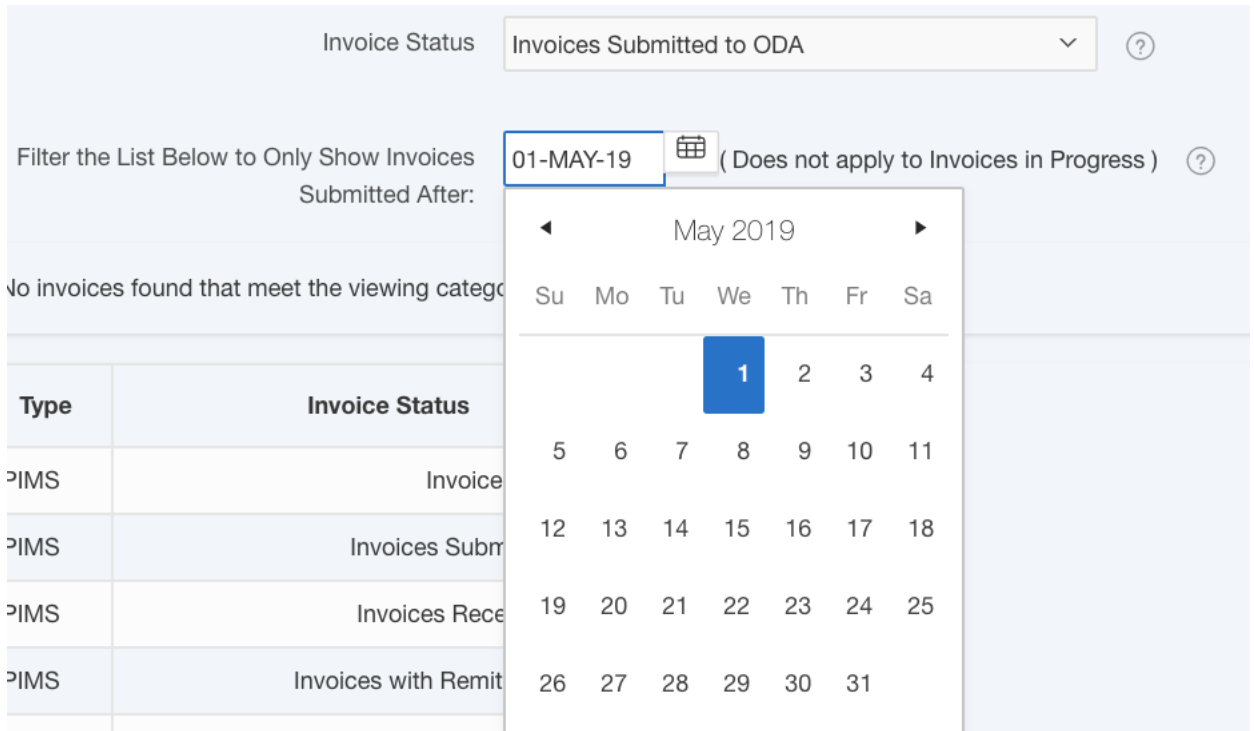
15. Invoice Status Views (cont'd.)

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.



- (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.)



Direct Data Entry (DDE) User Manual

(4) Click **Go**. A filtered list will display based on the date selected. Filter Result Example:

Invoice Status

Invoices Submitted to ODA ▼

?

Filter the List Below to Only Show Invoices Submitted After: (Does not apply to Invoices in Progress)

No invoices found that meet the viewing category selected.

Type	Invoice Status	Count
PIMS	Invoices in Progress	1362
PIMS	Invoices Submitted to ODA	3
PIMS	Invoices Received by ODA	479
PIMS	Invoices with Remittance Advice	3867
PIMS	Invoices Under Review with Remittance Advice	3321
Choices	Invoices in Progress	32
Choices	Invoices with Remittance Advice	17
Choices	Invoices Under Review with Remittance Advice	9

- (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.

Direct Data Entry (DDE) User Manual

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).

Reports Screen	Invoice Report	Consumer List	Services List	Choices Provider List	Download EDI Reports	Usage stats
PAA Administrator	X	X	X	X	X	X
PAA Operator	X	X	X	X	X	
Fiscal Intermediary	X	X	X	X		
Provider Operator	X	X	X		X	
Provider Operator Reports Only					X	

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.

The screenshot shows a web interface for viewing invoices. At the top, there is a search bar with a question mark icon. To the right are 'Search' and 'Clear' buttons. Below the search bar, it says '1 - 30' and 'Next' with a right-pointing arrow. The main content is a table with the following columns: Invoice Number, Provider, Location ID, Status, Inv. Rcvd Date, Detail Lines, and Invoice Total. The table contains four rows of data. An arrow points from the text '(2) Click a column heading...' to the 'Provider' column header.

Invoice Number	Provider	Location ID	Status	Inv. Rcvd Date	Detail Lines	Invoice Total
OCTOBER06	Miracle Health Care LLC-DO NOT USE	84867226	WIP	n/a	19	\$0.00
0207P7	Home Delivered Meals, Inc.	411963	WIP	n/a	70	\$0.00
032007P7	TLC Assisted Living Services, Inc.	99789872	WIP	n/a	1	\$0.00
032007P7	TLC Assisted Living Services, Inc.	99789872	WIP	n/a	21	\$0.00

- (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.

Direct Data Entry (DDE) User Manual

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.

Invoice Number	Provider	Location ID	Status	Inv. Rcvd Date	Detail Lines	Invoice Total
0207P7	Home Delivered Meals, Inc.	411963	WIP	n/a	70	\$0.00
FEB. 2007	From the Heart Home Health Care	28794210	WIP	n/a	0	n/a
1/07 NEWAR	Heartland Home Health Care	412568	WIP	n/a	7	\$0.00
03 2007P7	NCR At Home Health and Wellness	104619357	WIP	n/a	252	\$0.00

- 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.

Direct Data Entry (DDE) User Manual

16. Reports (cont'd.)

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.

Consumer Name ↑≡	Consumer No.	Address	City	State	Zip
Baughman, Wilma Kathleen	1158063	444 Cherry Sreet, 203-A	Waverly	OH	45690
Burkitt, Nancy Lou	1466867	444 Cherry Street, 209-A	Waverly	OH	45690
Humphrey, Joanne	1809455	444 Cherry St Rm 110-A	Waverly	OH	45690
Jordan, Lloyd L	592305	444 Cherry St Unit 114	Waverly	OH	45690
Mealey, Gail Shirley	1090840	444 Cherry St., Unit 211	Waverly	OH	45690
Patrick, Sylvia	1171932	444 Cherry Street	Waverly	OH	45690
Robinson, Opal C.	728919	444 Cherry St Unit 126	Waverly	OH	45690
Shumate, Lowell Donnely	1731629	444 Cherry Street, 211-A	Waverly	OH	45690

[Click here to download your Consumer List to a spreadsheet as a CSV file](#)

- (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.

Direct Data Entry (DDE) User Manual

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.

Service Code ↑≡	Description
S5101UA	PASSPORT - Enhanced ADS - 1/2 day
S5102UA	PASSPORT - Enhanced ADS - day
T2003UA	PASSPORT - ADS Trans - 1 way
T2025UAU5	PASSPORT - ADS Trans - round trip

[Click here to download your Services List to a spreadsheet as a CSV file](#)

- (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.

Direct Data Entry (DDE) User Manual

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

Time Stamp	Invoice ID -or- Filename
2019/05/20 16:55	MARAPR2019
2019/03/18 18:55	JAN&FEB19

1 - 2

Remittance Advice

Date ↓	Invoice ID -- RA Filename
2019/05/28 10:29	MARAPR2019 - RA150396791.pdf
2019/03/27 09:05	JAN&FEB19 - RA150388733.pdf

1 - 2

Remittance Advice may contain information for more than one invoice.

Reports by Type (last 90 days)

Report Type ↑	Count
Activity Summary	1
Remittance Advice	2
Report Total:	3

Direct Data Entry (DDE) User Manual

(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

- In the “Optional Search Criteria” text box, **enter a search string** that is contained in the Invoice ID or Date timestamp.
- Click **Search**. The results of the search will display.

Optional Search Criteria ? Search Clear

Reports

[Show All](#) [Activity Summary](#) [Remittance Advice](#) [Reports by Type \(last 90 days\)](#)

Activity Summary

Time Stamp	Invoice ID -or- Filename
2019/03/18 18:55	JAN&FEB19

1 - 1

Remittance Advice

Date ↓	Invoice ID -- RA Filename
2019/03/27 09:05	JAN&FEB19 - RA150388733.pdf

1 - 1

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

(8) Open a Report

- The reports are in PDF format. In order to open/view the report, Adobe Reader must be installed.
- Click **Filename** of the report.
- 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.

Direct Data Entry (DDE) User 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:

- Enter current password.**
- Enter new password.**
- Confirm password.**
- Click Apply Changes.** Click Cancel to cancel change password request.

b) Change My Email Address

(1) **Click Maintenance.**

Direct Data Entry (DDE) User Manual

(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

New Email



Confirm Email



(3) To change your email address:

- Enter new email address.**
- Confirm email address.**
- Click Apply Changes.** Click Cancel to cancel the change email address request.

Direct Data Entry (DDE) User Manual

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.**

Client Number

The fields here are used as the input values for the reports below. See each report region for a description of the required fields for that report.

ANTHONY, ERIN>655249 ⓘ PIMS Invoice Status, Last Update Times

Consumer's Recent Activity

A "Client Number" must be specified

This is a list of all the Service Codes the Consumer has on file in the DDE as of today. The "End Dates" are included. If this report is blank, the most likely cause is that there

Consumer Name And ID: **Robert Adkins, Client No. 1072075**

Service Code	Service Description	Service Begin Date	Service End Date	Provider Location ID	DBA Name
T1999UAU4	PASSPORT - HME-Non-Amb	27-MAR-19	31-MAR-19	412165	Hallmark Health Care, Inc
T1019UA	PASSPORT - Personal Care	01-NOV-18	31-MAY-19	196539725	Community Home Health Care, Inc.
T1019UA	PASSPORT - Personal Care	01-JUN-19	31-OCT-19	196539725	Community Home Health Care, Inc.

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.