

# **A Guide to Using [www.OhioDD.com](http://www.OhioDD.com)**



**Copyright 2014**


**Primary Solutions, Inc.**


**Last Updated 9/16/2014**

## This guide describes how to log on to www.OhioDD.com to access consumer information and submit local billing to the county for reimbursement.

### Navigating to the website

Open Internet Explorer and enter the www.OhioDD.com website.

 *Note that full website functionality is **only** guaranteed when using Internet Explorer at this time.*

 Click on Sign up

- Follow the instructions, filling out the information completely. Select the county or counties in which services are provided.
- When done, select Finish. This will send an email to the county requesting that they link the vendor and the user together.
  - Note that users will be able to log in once an account is created, but until the county links the account with the vendor record, the user will not be able to access any consumer or billing information.

 Once approved by the county, Click on the "Log In" tab

**ohioDD.com**  
An Information Resource for Ohio's DD Community

[Home](#) [Login](#) [SignUp](#) [FAQ](#)

### Welcome to ohioDD.com!

Please note that this web site is supported by Primary Solutions, Inc. This is **NOT** the web site of the Ohio Department of Developmental Disabilities. The Department's web site can be found at: <http://odmrdd.state.oh.us/>.


This web site was designed by [Primary Solutions](#) to facilitate the exchange of information between County Boards of DD, providers of DD services, and the individuals being served. This information has traditionally been exchanged using faxes, e-mails and good old-fashioned "snail-mail". These exchanges simply take too much time and are prone to varying levels of human error. What was needed was a way for information to be exchanged quickly...effortlessly...with no human intervention required.

ohioDD.com was created to meet this need, and currently provides these services:

- **Utilization Review:** Verify authorized vs. paid services...
- **County Billing:** Bill your County Board for Supported Living services on-line...
- **Demographics:** View consumer demographic and relationship information...
- **Payment Review:** View and download Supported Living payments...
- **Billing File Verification:** Check your IO/RFW billing file against county authorizations...
- **PAS Information:** View PAS Information directly from the County Board...

## A Guide to www.OhioDD.com

---

-  The log on page also allows users to change their password or show a reminder for the password

If you are registered with ohioDD.com, please enter your User ID and Password below. If you are not registered, please select the "Sign Up" tab at the top of Home page.

User ID:





Password:

---

Have you forgotten your password?  
Enter your User ID and your password reminder will be displayed or you can have your password e-mailed to you.

User ID:

Once logged on, users should see the various options listed, including Demographics, Billing, Payment Review, etc.

-  Note that there are additional instructions under each section
-  Do not use the web browser's 'Back' button when using www.OhioDD.com. Each web page has controls to navigate through the service. Select the 'Services' tab at the top of the web page to return to the main menu
-  Each county that utilizes www.OhioDD.com chooses the parts that they make available to the users. Therefore, there may be items showing below that may not actively used by all counties.
-  Please select the 'Log Off' tab and close the web browser to free up resources for other users when done using www.OhioDD.com

# A Guide to www.OhioDD.com



Login Complete.

Please select from one of the following Services:

<b>Utilization Review</b> Utilization Review <a href="#">Instructions</a>	<b>County Billing</b> Enter/Change Billing <a href="#">Instructions</a>	<b>Case Notes</b> Enter Case Notes <a href="#">Instructions</a>	<b>Demographics</b> View Demographics <a href="#">Instructions</a>
<b>Payment Review</b> Payment Review <a href="#">Instructions</a>	<b>Billing File Verification</b> Billing File Verification <a href="#">Instructions</a>	<b>PAS Information</b> View PAS By Name <a href="#">Instructions</a>	<b>Plan Information</b> View Plans By Name <a href="#">Instructions</a>





If you have any problems using these services, please click [here](#).  
Please do not use your web browser's 'Back' button when using ohioDD.com. Each web page has controls to navigate through the service. If you are in a service and want to use a different service, select the 'Services' tab at the top of the web page to return to this menu.  
Once you are done using ohioDD.com, please select the 'Log Off' tab and close your web browser to free up resources for other users.

## Demographics:

**Demographics**

[View Demographics](#)

[Instructions](#)

-  Select the *Demographics* button
-  Select the desire consumer to view their demographic data.
-  Select the *Show Demographics* button. If relationship information is available, it will be displayed directly below the consumer's demographic information.
-  To return to the Consumer Listing web page, select the *Back* button. Please do NOT use the back button on the Internet Explorer web browser.

View PAS Information:

**PAS Information**

View PAS By Name

[Instructions](#)


Select PAS Information By Name for:  
Green Acres Inc.

1. Select A Consumer:      2. Press Go:

Select a Consumer ▼

Go

 Select the *View PAS Information* button

 Select the desired consumer to view their PAS data and select Go

**PAS Listings By Name:**

**If you do not see the PAS information you are looking for, changing the Filter to View: 'All PAS Listings' and Revision(s): 'All' will show all of the consumer PAS Information.**

View:  Current PAS Only     All PAS Listings  
Revision(s):  Latest     All     

**This report contains information which is accurate up to and including the last upload to ohioDD.com from the County's Gatekeeper system. Any change in Authorized services since the last upload will not be reflected on this report.**

Select	Consumer Name	County	Med #	Resident #	Completed	Plan Year Start	Plan Year End	Type	Revision	Confirmed
<input type="radio"/>	Fake, Person	TEST		999999	09/06/13	08/01/13	07/31/14	Redeter		
<input type="radio"/>		TEST		999999	10/02/12	08/01/12	07/31/13	Initial		
<input type="radio"/>		TEST		999999	10/01/12	01/01/12	12/31/12	Revision	1	10/01/12

 Select the filters to show the PAS information, View and Revisions

 Current PAS only will list only the current plan year

 All PAS Listing will show all of the plans years on www.OhioDD.com

**A Guide to www.OhioDD.com**

---

- 🌐 Latest Revisions will show the latest revision for the plan
- 🌐 All Revisions will show all revisions on www.OhioDD.com
- 🌐 Select the desired PAS and select Show PAS Detail
- 🌐 To view another consumer's PAS information, choose Select Another Consumer

**County Billing:**

**County Billing**

[Instructions](#)

To Enter New Billing:

- 🌐 Select the Enter/Change Billing button
- 🌐 On the billing filter page, select the Dates of Service, the Consumer, and the Services to be billed. Press Go.
- 🌐 The billing page will correspond to the information entered on the filter. Enter the units of service provided by date of service and service code. Note that previously entered billing for dates in the Dates of Service specified will be displayed as well.

**Green Acres Inc.  
Enter County Billing For: Breeze, Autumn (CLIN:3817)**

<input type="button" value="Check All"/>											
Date	Service Code	Staff Size	Group Size	Service Location	Units	C	Rate	Total	Date Entered	Date Sent	Set To Resend
09/01/2014	DTB	01		14	<input type="text"/>	<input type="checkbox"/>	19.12				<input type="checkbox"/>
09/02/2014	DTB	01		14	<input type="text"/>	<input type="checkbox"/>	19.12				<input type="checkbox"/>
09/03/2014	DTB	01		14	<input type="text"/>	<input type="checkbox"/>	19.12				<input type="checkbox"/>
09/04/2014	DTB	01		14	<input type="text"/>	<input type="checkbox"/>	19.12				<input type="checkbox"/>
09/05/2014	DTB	01		14	<input type="text"/>	<input type="checkbox"/>	19.12				<input type="checkbox"/>
<b>Totals:</b>					0.00			\$0.00			

[\[TOP OF PAGE\]](#)

- 🌐 To copy units from one row of billing to another without re-keying, choose a row of billing that has the units value already entered.
- 🌐 Select the check box under the C column (in the same row) next to where the units value has been entered.

											Check All
Date	Service Code	Staff Size	Group Size	Service Location	Units	C	Rate	Total	Date Entered	Date Sent	Set To Resend
02/01/2014	LPS	01			1	<input checked="" type="checkbox"/>	15.00				<input type="checkbox"/>
02/02/2014	LPS	01				<input type="checkbox"/>	15.00				<input type="checkbox"/>
02/03/2014	LPS	01				<input type="checkbox"/>	15.00				<input type="checkbox"/>

- 🌐 Note that checking the checkbox on a line will copy the unit field to all lines below. To copy one line check the box with the desired units AND the lines that need to be copied. The copy will then only copy the units to the checked fields.
- 🌐 To do additional billing for another consumer, press Save and then press Do More Billing. **Save the billing before moving on to enter billing for another consumer.**

To Change Existing Billing:

**County Billing**

[Instructions](#)

- 🌐 Press the Enter/Change Billing button on the www.OhioDD.com Services web page. Select the Dates of Service, the Consumer, and the Services that need changed. Press Go.
- 🌐 Change the units of service to be the correct total of units provided. If the service was previously e-mailed to the county, changing the units will automatically release the record to again be e-mailed to the county. To delete units for a date of service, click to the right of the existing units number and press the Backspace button on the keyboard to remove the value.

- 🌐 If this billing had been previously e-mailed to the county and needs to re-submitted, without changing the units, check the checkbox in the Set to Resend column. This releases these records to be e-mailed to the county (see To Re-Submit Billing to the County below).

Check All											
Date	Service Code	Staff Size	Group Size	Service Location	Units	C	Rate	Total	Date Entered	Date Sent	Set To Resend
01/01/2014	LGS	01			1	<input checked="" type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input checked="" type="checkbox"/>
01/02/2014	LGS	01			2	<input type="checkbox"/>	50.00	100.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/03/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/04/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/05/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/06/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/07/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/08/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/09/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>
01/10/2014	LGS	01			1	<input type="checkbox"/>	50.00	50.00	09/03/2014	09/03/2014	<input type="checkbox"/>

**To E-Mail Billing to the County:**

- 🌐 Once all billing has been entered and it is ready to submit it to the county, press the E-Mail Billing button either from the data entry web page or from the Services web page.

- 🌐 To add records, press Enter New Billing; to change any of these records before sending, press Enter/Update Billing.
- 🌐 If there are any unauthorized services that have been entered, they will have to be deleted before the file can be sent. To do this, press the Delete Billing Records button when it appears at the bottom of the web page.

**To Re-Submit Billing to the County:**

- 🌐 Press the Enter/Change Billing button on the www.OhioDD.com Services web page. Select the Dates of Service, the Consumer, and the Services to be re-submitted.



## A Guide to www.OhioDD.com

- Select the records that need to be resent by checking the checkbox in the Set to Resend column. To resend all of the records, click the Check All button in the upper right-hand corner of the table.

Check All

- If corrections are needed to any of the records, change the units of service by date of service and service code to be the correct total of units provided.

### To View Previous Billing:

- This feature is used to view previous billing and save a report that will include information about when the billing was entered and submitted to the county.

View Previous Billing

- Choose filters for the desired consumer, time period, and services. Select the report type: Detail Search or Monthly Summary. The next screen will display the requested information and allow users to save the report as a PDF.

**View Previous County Billing for:**  
Wolfe Residential

<b>1. Select a Date Range:</b> Begin Date 01 01 2014 End Date 08 31 2014 August Previous Month Next Month	<b>2. Select A Consumer (Optional):</b> Fake, Person (TEST:1020) Clear	<b>3. Select Services:</b> UnCheck All <table border="1"><thead><tr><th>Select</th><th>Service</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>LGS</td></tr><tr><td><input checked="" type="checkbox"/></td><td>LPD</td></tr><tr><td><input checked="" type="checkbox"/></td><td>LPS</td></tr><tr><td><input checked="" type="checkbox"/></td><td>SCT</td></tr><tr><td><input checked="" type="checkbox"/></td><td>SDF</td></tr></tbody></table>	Select	Service	<input checked="" type="checkbox"/>	LGS	<input checked="" type="checkbox"/>	LPD	<input checked="" type="checkbox"/>	LPS	<input checked="" type="checkbox"/>	SCT	<input checked="" type="checkbox"/>	SDF	<b>4. Select a Report:</b> Detail Search Monthly Summary
Select	Service														
<input checked="" type="checkbox"/>	LGS														
<input checked="" type="checkbox"/>	LPD														
<input checked="" type="checkbox"/>	LPS														
<input checked="" type="checkbox"/>	SCT														
<input checked="" type="checkbox"/>	SDF														

### Review Utilization:

- Select the Utilization Review button on the www.OhioDD.com Services web page:

**Utilization Review**  
Utilization Review  
[Instructions](#)

- On the filter page, enter the Date Range, the Date Type, County, Service(s)

and press the Search button.

**Wolfe Residential Search Options:**

**1. Select a Date Range:**

Begin Date   2014

End Date   2014

**Select Records Based On:**

Service Date

Completion Date


**2. Select Counties:**

Select	County
<input checked="" type="checkbox"/>	Test County

**3. Select Services:**


Select	Service
<input type="checkbox"/>	ADF
<input type="checkbox"/>	ADL
<input type="checkbox"/>	ADS
<input type="checkbox"/>	AFO
<input type="checkbox"/>	AIL
<input type="checkbox"/>	ALR
<input type="checkbox"/>	AOC
<input type="checkbox"/>	APC

**4. Press Search:**

 Select the consumer(s).

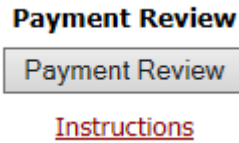
**Wolfe Residential Consumer Listing:**

Select	Consumer Name	Date of Birth	SSN	Medicaid #	Local ID	Resident #
Test County County						
<input checked="" type="checkbox"/>	Fake, Person				987654	999999

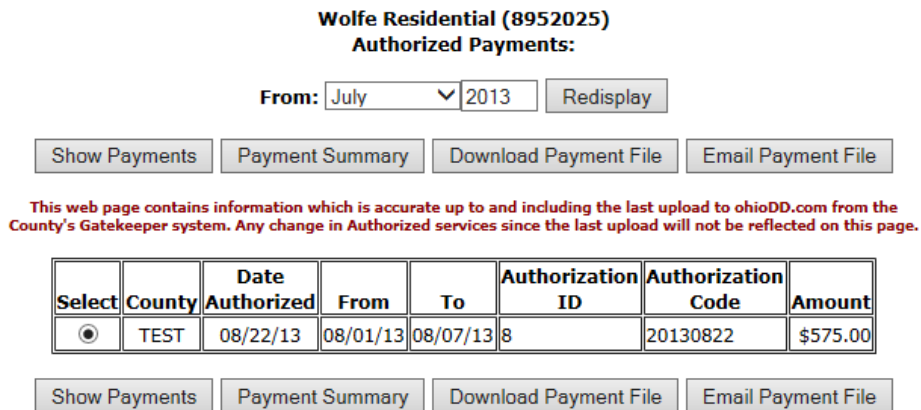
 Select either the Show Web Report or Show PDF Report button. The Show Web report will generate the report in the web browser. The Show PDF Report button will create a downloadable PDF file that can be saved for future reference.

## Payment Review:

- Press the Payment Review button on the www.OhioDD.com Services web page.

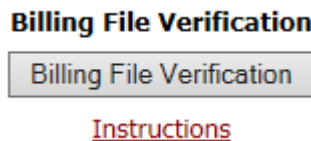


- Select the particular Payment Authorization billing records to be viewed and press the Show Billing button or download a formatted payment file by pressing the Download Payment button.
- Several options are available on this screen to allow users to Show payments, line by line, view Payment Summaries, and download or email files.



## Billing File Verification:

- Press the Billing File Verification button on the www.OhioDD.com Services web page.



- Use the Browse button to select the billing file and press the Upload File button.
- The next window displays the verification status of each billing record.

To verify another billing file, press the Upload Next Billing File button.  
Plan Information:



Select Plan Information By Name for:  
Ward Test

1. Select A Consumer:

Greene, Rachel (TEST:10000113) ▼

2. Press Go:

Go


Ward Test (8952025)  
Plan Listings By Name:

If you do not see the Plan information you are looking for, changing the Filter to View: 'All Plan Listings' and Revision(s): 'All' will show all of the consumer Plan Information.

View:  Current Plan Only  All Plan Listings  
Revision(s):  Latest  All Filter

This report contains information which is accurate up to and including the last upload to ohioDD.com from the County's Gatekeeper system. Any change in Authorized services since the last upload will not be reflected on this report.

Select Another Consumer

Select	Consumer Name	County	Med #	Resident #	Plan Type	Plan Year Start	Plan Year End	Effective Start Date	Effective End Date	Revision Type	Revision Number
	Greene, Rachel	TEST	400000000000		MPV5	03/15/14	03/14/15	03/15/14	03/14/15	Initial	



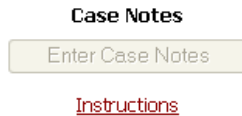
Select Another Consumer

[\[TOP OF PAGE\]](#)

- Select the View Plans by Name button
- Select the consumers for which you want to view their Plan data and Select Go
- Select the filters to show the Plan information, View and Revisions
- Current Plan only will list only the current plan year
- All Plan Listing will show all of the plans years on www.OhioDD.com
- Select the desired Plan and select the PDF icon
- To view another consumer's Plan information, choose Select Another Consumer

Case Notes:

- Once logged in, the case note button will be active. If the button is greyed out, the user is not approved to enter case notes on the web. Please contact the County Board Contact for access to enter notes.



- After selecting the Enter Case Notes button, the case note page will appear. To enter notes, click on the Enter a New Note button at the bottom right side of the page.
  - For information on the other options available from this page, see the Viewing Notes directions following this section.

**Case Notes for: Tammy Wolfe (8952025)**

Case Note Summary						
Total	Not Sent	Sent	Received	Rejected	Non-Billable	
25	11	0	3	11	0	

Show Timeout Warning:

**Filter Options:**

From (Service Date) To				From (Date Entered) To			
▼	▼	▼	▼	▼	▼	▼	▼
<b>Service</b>		<b>Type</b>		<b>Status</b>		<b>Billable</b>	
▼		Normal ▼		▼		Yes ▼	
<b>Consumer</b>				<b>Case Manager</b>			
▼				▼			

- Select Enter a New Note:

## A Guide to www.OhioDD.com

---

**Please Enter Consumer Information:**

Service Date (MM/DD/YYYY): 02 ▾ / 12 ▾ / 2014 ▾

Consumer: Select a Consumer ▾

Service Code: Select a Service Code ▾

---

Case Manager: ▾

Start Time (HH:MM AM/PM): ▾ : ▾ AM ▾

End Time (HH:MM AM/PM): ▾ : ▾ AM ▾

No. of Consumers: ▾

Enter Notes: Billable: Yes ▾

- 🖱️ Complete the Date, Consumer and Service Code information in the top ½ of the screen:

**Please Enter Consumer Information:**

Service Date (MM/DD/YYYY): 02 ▾ / 12 ▾ / 2014 ▾

Consumer: Select a Consumer ▾

Service Code: Select a Service Code ▾

- 🖱️ The services codes are populated from the current authorization at the County Board based on the date of service selected, and the chosen consumer. If the expected service code is not an available option, or if the following message appears, contact the County Board for assistance.

**WARNING: No Service Codes were found. Change the Service Date and/or the Consumer to select a valid Code.**

## A Guide to www.OhioDD.com

- After the top portion of the screen is successfully completed, it will become greyed out and the user will be granted access to the bottom portion of the screen.
  - Complete all of the information using the drop-down lists for selection. Don't forget to type in the narrative note as well. The Location and Contact drop down lists are set-up by each County Board.

**Enter the Case Note:**

**Type:** Normal    **Status:** Not Sent

**Service Date (MM/DD/YYYY):** 02 / 12 / 2014

**Consumer:** Smith, Jason [TEST:1007]

**Service Code:** LPS   

---

**Case Manager:** Wolfe, Tammy [TEST:1005]

**Start Time (HH:MM AM/PM):**    :    AM

**End Time (HH:MM AM/PM):**    :    AM

**No. of Consumers:** 1    **Minutes:**    **Units:**

**Service:** S: Service Coordinating

**Contact:** I: With Individual

**Enter Notes:** **Billable:** Yes

- When finished, users MUST click on the Save button in the lower left corner in order to save the note for future transmission to the County Board.
  - If user does not select Save, but rather choose "Enter New Note", the original note **will not be saved and will not be able to be retrieved**. Users will receive a warning in this regard.

- 🖱 Upon selecting the Save button, the system will perform a number of edits to make sure that the information entered meets the necessary criteria to be a valid note. If there are errors with the note entered (i.e. – not enough authorized time remaining for the length of the note), user will receive an error message indicating the specific error. This error must be corrected before the note can be saved.
  
- 🖱 After clicking the Save button, to immediately enter another note, select Enter New Note. Continue to enter the new note, save it, and continue this pattern until all of the notes are entered.
  - To review notes that have been entered, select Show Notes. This function will allow users to the review page all of the notes that have been entered and choose any other variety of operations.

## Reviewing Notes:

To review/work with individual notes, the bottom half of the case note option page screen will allow users to filter to capture the desire notes.

- 🖱 Selecting specific criteria from the drop down lists, allows the filtered information that appears. If no filters are chosen, all of the case notes that have ever been created on the account will be displayed.

Filter Options:

From (Service Date) To	From (Date Entered) To
<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
Service <input type="text"/>	Type <input type="text"/>
Consumer <input type="text"/>	Status <input type="text"/>
	Case Manager <input type="text"/>



## A Guide to www.OhioDD.com

- After the criteria is set, choose the Show Notes button. The following window will appear:

**Case Notes for: Tammy Wolfe (8952025)**

Please check your filter settings if you do not see expected Case Notes

View Note	Consumer Name	Service Date	Service Code	Case Manager	Start Time	End Time	Date Entered	Type	Latest Date Sent	Status	View History
<input type="radio"/>	Hartshorn, Zoey	08/01/13	STT	Wolfe, Tammy	10:00 AM	10:30 AM	10/03/13	Normal	10/18/13	Received	<input type="radio"/>
<input type="radio"/>	Jenson, James L	08/01/13	STE	Wolfe, Tammy	01:00 PM	01:30 PM	09/17/13	Normal	10/18/13	Received	<input type="radio"/>
<input type="radio"/>	Jenson, James L	08/01/13	STE	Wolfe, Tammy	08:15 AM	08:30 AM	09/17/13	Normal	10/18/13	Received	<input type="radio"/>
<input type="radio"/>	Smith, Jason	04/30/13	LPS	Wolfe, Tammy	01:00 PM	02:15 PM	06/09/14	Normal		Not Sent	<input type="radio"/>
<input type="radio"/>	Smith, Jason	02/01/14	LPS	Wolfe, Tammy	08:20 PM	09:00 PM	04/02/14	Normal		Not Sent	<input type="radio"/>
<input type="radio"/>	Smith, Jason	02/12/14	LPS	Wolfe, Tammy	01:05 AM	01:20 AM	09/15/14	Normal		Not Sent	<input type="radio"/>
<input type="radio"/>	Smith, Jason	02/12/14	LPS	Wolfe, Tammy	08:00 AM	09:00 AM	09/15/14	Normal		Not Sent	<input type="radio"/>
<input type="radio"/>	Smith, Jason	02/12/14	LPS	Wolfe, Tammy	08:15 AM	09:15 AM	09/15/14	Normal		Not Sent	<input type="radio"/>
<input type="radio"/>	Smith, Jason	02/12/14	LPS	Wolfe, Tammy	08:30 PM	09:30 PM	09/15/14	Normal		Not Sent	<input type="radio"/>

- To View the content of a note, click in the circle in the View Note column next to the desired note. Only notes that have not been sent to the County Board may be edited.
- The Status column will indicate the current status of the individual note.
- Not Sent means the note has not yet been sent to the County Board and may be edited;
- Sent means the note has been sent to the County Board, but has not been processed yet;
- Received means the note has been sent to the County Board and has been processed.
- Rejected means the note has been sent to the County Board and has been processed but was rejected by the County Board.
- To see the activity associated with any note, click on the circle in the View History column.
- The Type column will indicate the current type of the note.
- Normal means the note has been submitted and reimbursement is pending;
- Credit means the note is being sent to correct a note that had been sent in error previously and something about the reimbursement needed to change.

## Sending Notes:

After notes have been created, they must be sent to the County Board by the user. Notes can be sent one at a time or in groups. In order to send a note or a group of notes to the County Board, you must go through the Review Notes steps explained above.

- 🌐 On the main case note option page, set the filter criteria for the notes will be sent. This can be accomplished by using the various filters to pull by date, consumer, etc.
  - Note the Status dropdown list is particularly useful in determining notes that have not been sent. If this is the only filter chosen, the next page will show only those notes that have not been sent to the county.

Case Notes for: Family Home (052424)

Case Note Summary					
Total	Not Sent	Sent	Received	Rejected	Non-Billable
27	15	0	3	9	0

Show Timeout Warning:

Filter Options:

From (Service Date) To From (Date Entered) To

- 🌐 Once the notes are ready to send, click on the Show Notes button.

Case Notes for: Test Vendor (V00065)

View Note	Consumer Name	Service Date	Service Code	Case Manager	Start Time	End Time	Date Entered	Type	Latest Date Sent	Status	View History
<input type="radio"/>		01/05/05	POTT		10:01 AM	10:02 AM	01/27/05	Normal		Not Sent	<input type="radio"/>

- 🌐 Verify that these are the notes should be sent, click on the Send Notes button.

## A Guide to www.OhioDD.com

Case Notes for: Test Vendor (V00065)

View Note	Consumer Name	Service Date	Service Code	Case Manager	Start Time	End Time	Date Entered	Type	Do Not Send
		01/05/05	POTT		10:01 AM	10:02 AM	01/27/05	Normal	<input type="checkbox"/>

Send

Show Notes

- Check the Do Not Send box on notes that are not ready to send. Those notes will be held at a status of Not Sent.
- To return to the filtered list of notes without sending any note, click on the Show Notes button.
- To send the notes that appear in the window, click on the Send button. The following will appear and the notes have been successfully sent. To return to the review window, click on Show Notes.

Case Notes for: Test Vendor (V00065)  
The following Notes were Sent:

Consumer Name	Service Date	Start Time	End Time	Service Code	Date Entered	Date Sent	Warning Message
	01/05/05	10:01 AM	10:02 AM	POTT	01/27/05	01/27/05	

Show Notes

## Reports:

At the top of the page is a summary of the Case Note activity on the user account. To see a summary and/or detail reports of the activity on the user account, click on the button. The following page will open up:

Case Notes for: Tammy Wolfe (8952025)

**Please check your filter settings if you do not see expected Case Notes**

Show Filters

Refresh

Show Reports

Enter a New Note

## A Guide to www.OhioDD.com

---

### Case Note Reports for: Tammy Wolfe (8952025)

#### Filter Options:

From (Service Date)			To			From (Date Entered)			To		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Service</b>	<b>Type</b>		<b>Status</b>			<b>Billable</b>					
<input type="text"/>	<input type="text" value="Normal"/>		<input type="text"/>			<input type="text" value="Yes"/>					
<b>Consumer</b>						<b>Case Manager</b>					
<input type="text"/>						<input type="text"/>					
<input type="button" value="Set to Defaults"/>	<input type="button" value="Clear Filters"/>	<input type="button" value="Web Summary Report"/>			<input type="button" value="PDF Summary Report"/>						
		<input type="button" value="Web Minutes Report"/>			<input type="button" value="PDF Minutes Report"/>						
		<input type="button" value="Web Detail Report"/>			<input type="button" value="PDF Detail Report"/>						

---

By selecting any specific criteria from the drop down lists, users can filter the note information that shows up on either the summary or detail report. If no filters are chosen, the reports will populate information related to all of the case note activity that has ever been created.

There are a variety of reports available, including web or PDF report that can be printed, emailed or saved for future reference.