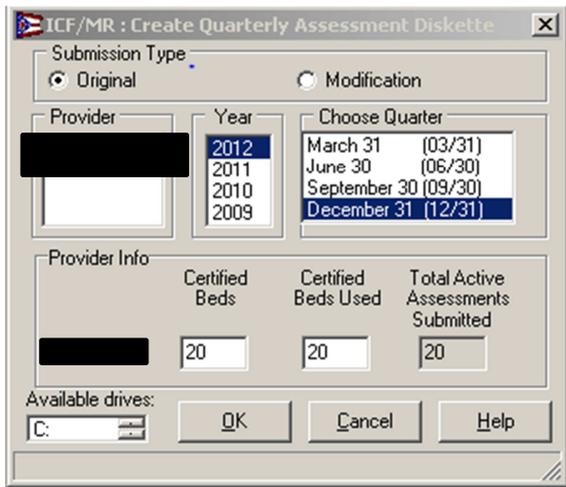


IAF Online Submission Training Guide

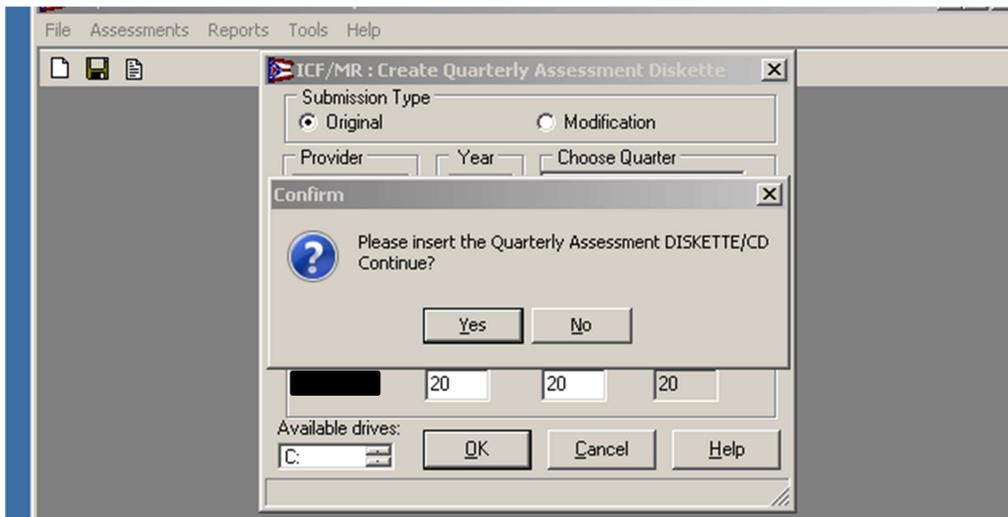
Introduction: The Individual Assessment Form (IAF) is done quarterly on each resident of an ICF-IID facility regardless of payment source as of the Reporting Period End Date (RPED). The IAF assessment information is completed using the IAF provider software found here:

[http://dodd.ohio.gov/residential/Pages/Individual-Assessment-Form-\(IAF\)-Provider-Software.aspx](http://dodd.ohio.gov/residential/Pages/Individual-Assessment-Form-(IAF)-Provider-Software.aspx)

This same software will still be used to complete the assessments. Once the assessments are completed you should save the file as you have in the past as shown below. Select the desired location to save the file where you can easily access it (For instance, your C drive). However, it will no longer be mailed on a diskette/CD/flash drive:

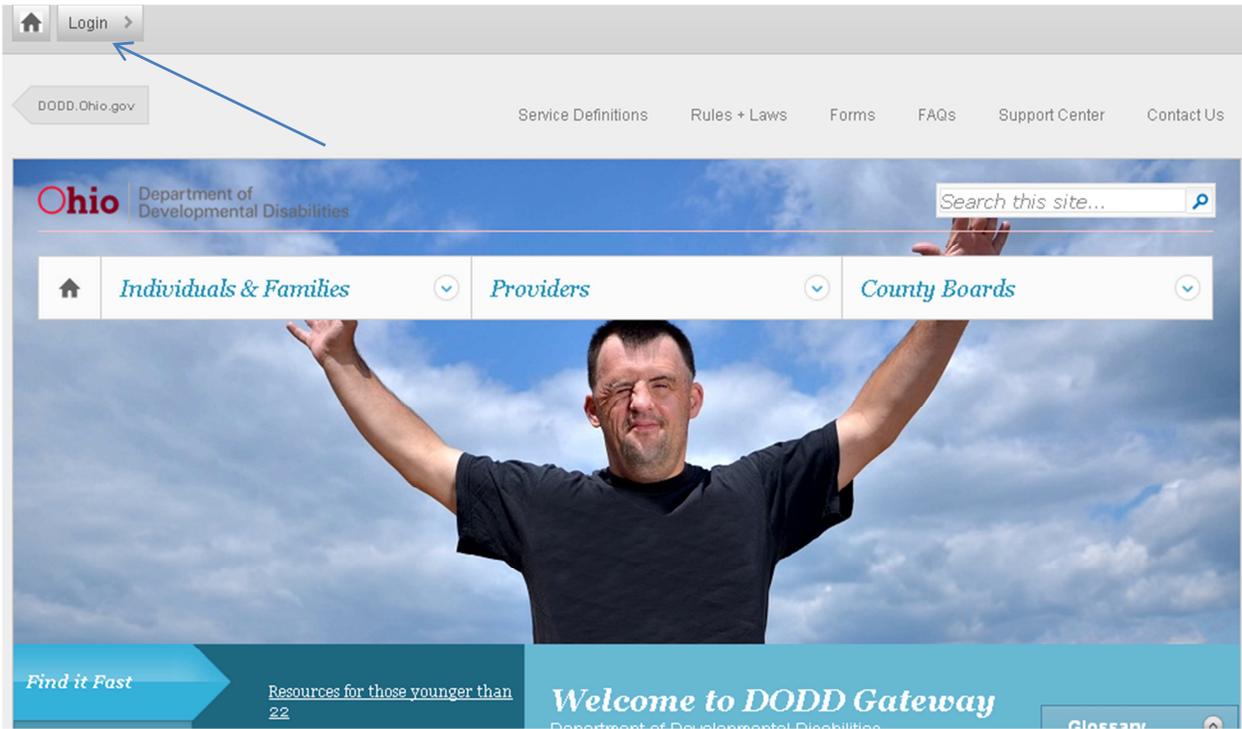


Click "Yes" if you receive the following message:



Then log into the DODD Web portal found here: <https://doddportal.dodd.ohio.gov/Pages/default.aspx>

Click on the Login found in the top left hand corner of the screen as shown below:



Login using the username and password given to you when you completed the Submission Agent affidavit:



Login for County Boards, Providers, and DODD Central Office

Please do not bookmark this page or add this page to your favorites. This page will not work as a bookmark or a favorite.

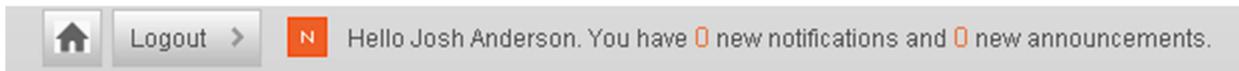
Type your user name and password.

User name:

Password:

[Back to Portal](#) [Forgot Password](#)

Once logged in you should see your name at the top of your screen:



Click on "Applications" in the top center of the page and a box should appear at the top right of your screen:



Select IAF from the dropdown and click on the Load Application button. The following security message may pop up:



Click on "No" to continue. You will be taken to the home screen:

A screenshot of a web application interface. At the top, there is a navigation bar with a home icon, "Logout", a notification area saying "Hello Josh Anderson. You have 0 new notifications and 0 new announcements.", and a "View All" link. Below this is the "AF" logo and a "Select Application" dropdown menu set to "IAF", with a "Load Application" button. The main heading is "Individual Assessment Form Online Submission". Below that is a welcome message "Welcome Josh Anderson - [redacted]" and a "Menu" link. The main content area is titled "Home: Upload Report". It features a "Select Provider:" dropdown menu set to "All". Below that is a "Select a Report to Upload:" text input field with a "Browse..." button. Underneath is a "Click to upload the report:" label and an "Upload" button. A section titled "Reports Uploaded" contains a "Filter By RPED:" dropdown menu set to "3/31/2013" and an "Export" button. Below this is a table with the following columns: File Name, File Status, Submitted Date, Certification Date, JFS Upload Date, Comments, Batch, Update, and Report Options. The table is currently empty.

Select the provider you wish to upload a file for. You should see all of the providers you are associated with under the dropdown box. Click the browse button to find the IAF file you saved previously (in this example the file was saved directly to the C: drive in the IAF provider software so by browsing to the C drive the file was easily selected). It should be a file starting with the letter "P" then the 7 digit Medicaid provider number with .iaf as the extension. Click on the Upload button.

Home: Upload Report

Select Provider:

Select a Report to Upload:

Click to upload the report:

The Assign Assessors screen will appear next if the upload is successful. For each resident select the assessor from the drop down list. If the assessor is the same for each individual, click on the "Select same as previous assessor" button to the right for each line. An approved assessor must be selected for each resident that appears as active.

Individual Assessment Form Online Submission

Welcome Josh Anderson - [Menu](#)

2. Assign Assessors

Provider#: Report ID: 20130331_Rev01.iaf

RPED: 3/31/2013 Date Uploaded: 6/17/2013

First Name	Last Name	Init	SSN	Assessors	Click to assign same Assessor
<input type="text"/>	<input type="text"/>		xxxx9180	12120241: Rosemary Orlando	
<input type="text"/>	<input type="text"/>	S	xxxx2106	--Select Assessor--	Select same as previous assessor
<input type="text"/>	<input type="text"/>		xxxx0586	--Select Assessor--	Select same as previous assessor
<input type="text"/>	<input type="text"/>		xxxx3297	--Select Assessor--	Select same as previous assessor
<input type="text"/>	<input type="text"/>		xxxx7480	--Select Assessor--	Select same as previous assessor

Once all assessors are selected you have 2 options. If you click "Save" the assessor assignments will be saved but the submission process will not yet be completed. If you click "Save and Continue", the application will move forward to the certification page to complete the submission process. It is recommended you always click "Save and Continue" unless you are unable to complete the certification at the time of entry.

<input type="text"/>		xxxx4053	12120241: Rosemary Orlando	Select same as previous assessor
<input type="text"/>	B	xxxx5436	12120241: Rosemary Orlando	Select same as previous assessor
<input type="text"/>		xxxx8642	12120241: Rosemary Orlando	Select same as previous assessor
<input type="text"/>		xxxx6770	12120241: Rosemary Orlando	Select same as previous assessor

Once you "Save and Continue" you will be taken to the certification page. This page should look familiar as it essentially mirrors the certification page that was required to be printed and mailed with IAF assessments in the past. Please review the information at the top to make sure it is correct. Fill in the Administrator and Contact Person information and you are ready to complete the process. Click on the "Submit" button to officially submit your IAF assessments. Click on the "Save" button only if you are not ready to submit officially. **You must click "Submit" to formally send your assessments to the Department.**

3. Certify

Provider#: [REDACTED] Report ID: [REDACTED]_20130331_Rev01.iaf
RPED: 3/31/2013 Date Uploaded: 6/17/2013

Provider Address

Address 1: [REDACTED] Address 2: [REDACTED] City: [REDACTED]
State: Ohio Zip: [REDACTED] County: FRANKLIN COUNTY

Facility Census Data

Certified Beds: 9 Certified Beds In User: 9 Total Active Assessments: 9

Facility Certification

On behalf of this facility, I certify that to the best of my knowledge and belief, the information included in this document and in the IAF answer sheet(s) submitted with this document, are true and accurate. For any submissions of machine readable assessments or computer generated reproductions of original IAF answer sheets, I understand that I am certifying that the required signatures/certifications of staff participating in the IAF assessments are contained in the original document on file at this facility.

Certified By Administrator or Designee

Last Name: Jenkins First Name: Debbie Title: Manager Date: 06/17/2013

Contact Person

Last Name: Anderson First Name: Josh Phone: 6143870576 Email: derson@dodd.ohio.gov
eg: abc@xyz.com

This report must be submitted no later than the 15th of the month following the end of the calendar quarter (RPED). An IAF must be submitted for each active assessment every quarter. Penalties have been established for the non-submission of case mix data. Failure to submit this form and/or the resident assessment data will result in a reduction in the providers direct care component.

[Previous](#) [Save](#) [Submit](#)

Once you officially submit you will be taken back to the home page. If your submission is successful you will get a message saying “Certification Completed Successfully”. The history of your uploaded files for the quarter will be given below. The File Status column will also tell you if a submission was “Certified” (submitted successfully) or “Invalid” (has errors that need corrected). If there are errors they will appear in the Comments column.

The screenshot shows the IAF web application interface. At the top, there is a navigation bar with the IAF logo, a 'Select Application' dropdown menu set to 'IAF', and a 'Load Application' button. Below this is a header section with the title 'Individual Assessment Form Online Submission' and a welcome message 'Welcome Josh Anderson - IAF_Admin'. The main content area is titled 'Home: Upload Report' and features a yellow notification bar with the message 'Certification Completed Successfully.' Below the notification bar, there are several form elements: a 'Select Provider:' dropdown menu, a 'Select a Report to Upload:' text input field with a 'Browse...' button, and an 'Upload' button. A section titled 'Reports Uploaded' contains a table with a 'Filter By RPED:' dropdown menu set to '3/31/2013' and an 'Export' button. The table has four columns: 'File Name', 'File Status', 'Submitted Date', and 'Certification Date'. A red arrow points from the 'Export' button to the text below.

File Name	File Status	Submitted Date	Certification Date
20130331_Rev01.iaf	Certified	6/17/2013	06/17/2013

You may also export the list to Excel to allow you ease of sorting and organizing if you have multiple providers.

That’s it! You’ve successfully submitted IAF assessments online! Remember if you chose to click just the “Save” option at any point you will need to go back and complete the required information and hit the “Submit” button on the certification page for your submission to be complete.

For further questions on IAF online submission please feel free to contact Josh Anderson by email at josh.anderson@dodd.ohio.gov or by phone at (614) 387-0576.