DDP1 – Registration / Movement Form

DDP1, Registration/Movement Form, is used, to add an Individual, already known to TABS, to a new program, remove from a program, complete a demographic change, document that an individual has moved out of state or show a transfer within the agency.

The DDP1 may also be used to register a new individual through CHOICES into the Tracking and Billing System (TABS) and a new Program, under very limited circumstances. See page 11 for instructions on New Individual to TABS. NOTE: Only a few FSS programs will fit these criteria. If you have any questions regarding this, please call the local DDSO.

Add to Program

Go to the Individuals section and find the individual you need to add to a program.

Search for the Individual by typing the last name in the search box and click the Find icon.

Click on the name, to open the individual’s record.
NOTE: Allow all records or forms to fully open before trying to maximize or clicking within to begin work.

The individual's record has all the forms necessary.

Click on the form section (DDP1 in this example) to get a new form or view any saved, submitted or Inactive form.

In this example, we are completing a New DDP1 for an Add to Program:
Click the, *Add New DDP1 – Registration/Movement Form*, button

A new DDP1 for Kevin displays and the, *Purpose*, of the form defaults to “Add”
Scroll down the form to the *Agency / Program Information Section* and complete the 2 required fields: 

*Add TABS Program Code*, click on the *Find* icon to look up the program codes for your agency.

Users cannot type any program codes in CHOICES; all must be selected via the Find icon.

Fill in the correct Add Date in the “*Remove/Add Date*” field. Type a date or click the calendar to use.

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An example of using the, *Find*, icon for a TABS Program code: click the icon:

The following Look Up Record displays with the entire list of the Agency’s Program Codes. There may be pages of program codes; check the Page section, at the bottom right of this box, if the forward arrow is **blue**, not grayed out, there are multiple pages of codes.

**NOTE:** Users can sort by clicking on the *Program Name*, heading button, to group and alphabetize programs if you cannot find your code. (Any of the column heading buttons can be used to sort)
The agency section is now filled in with all required fields. (Required fields have Red asterisks *)

The DDP1 for an Add to Program is completed, but any supporting documents will need to be uploaded to this form.
The Supporting Document section is grayed-out, please click the Save button to activate the Supporting Documents section of the DDP1. (See the Step by Step, Supporting Documents, if necessary for full instructions on Uploading.)

The lower half of the DDP1, starting with the Disabilities section is grayed out, for an Add to Program. Except for the Purpose of, Demographic Change, the lower half of DDP1 will always be grayed-out.
DDP1 - Purpose of, *Demographic Change*, allows Disabilities and following sections to be edited.

In the **Disabilities** area of the DDP1, most of the fields are in “radio button” format. To change a radio button from **No** to **Yes**, simply click in the white circle next to **Yes**. A solid black circle will then appear, indicating that **Yes** is selected.

To finish the DDP1, upload supporting documents at the **Supporting Documents** section of the DDP1. Click **New** and upload the necessary document(s).

**NOTE:** DDSOs will return any form that does not have the supporting documents uploaded directly to the form.
Once all supporting documents are uploaded, **Submit** the form.

Click, **Form Actions**

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If necessary to **Save & Close** the form, you may do so. But even to **Save** a form, all required fields must be completed. But all saved forms are still fully editable. You can return to the form and change even a required field.

Under the **Form Actions** tab, are function buttons.

**Submit Form**, will submit the form to the DDSO.

**View PDF**, will display a PDF version of the form at the time of last “**Save**”. Thus if you changed information and wish to view the latest information, click “Save” before you view the PDF.

**Copy**, will copy the form. **NOTE:** It *will not* copy any supporting documents forward to the copy. (See, **Supporting Documents**, Step by Step on how to “Link to the form”.) And because a new DDP1 was created by copying another form, the new DDP1 must be **saved** before “**Submit**” will be available.

**Saving** a form, any form, will add more functionality, and activate buttons.
Once a function of Submit or Save & Close is done, the form automatically closes and files on the list of forms within the section. We have been doing a DDP1, so that is the section displayed.

**NOTE:** You may have to refresh the list to see the latest DDP1 that you have completed.

Each form, whether Saved, Submitted, Approved or whatever the Form Status is, is listed in the form’s section. Each column, in the section, has a heading button which will allow you to sort by clicking on that button.

**Beyond Add to Program**

The “Beyond Add to Program” process, shown below, applies to the following **DDP1 Purposes**: Demographic Data Change, Moved out of State, Remove, Died, and Transfer Within Agency.

The instructions here assume that the individual is registered to TABS, and is being served by the agency. To begin, find the **Individual’s** record as previously shown for Add, open and go to the DDP1 section.
When the new DDP1 opens, change the Purpose to whatever you need: click on the down arrow to open the drop down menu, point the cursor to highlight and then click to select. Each selection will have its own required fields, marked with a red asterisk *.
For a Demographic Change, please select which DDSO to send the information. Even if one automatically fills in, you can click on the Find icon to do a Look up of all the DDSOs your agency serves.

**NOTE:** With all Demographic changes, please use the Notes section of the DDP1 to state what it is you are changing. The DDP1 will not have any fields marked as different or changed, so the DDSO will not know what specifically you are changing.

Click on the word, Notes.
The Notes section of the form opens, click on the instructions, **Add a new note...**

![Image of form with notes section open](image)

The cursor will automatically display within a writing section.

![Add a new note...](image)

Type your message. There is no Spell Check in CHOICES! Even without clicking Save, all messages are automatically saved once the cursor leaves the typing field - it is no longer editable.

If you need to add more information, just click “Add a new note...” again and continue

![Notes section](image)

Also, the message will automatically be dated and the user’s name filled in as soon as you Save or Submit the form.

![Message dated and named](image)

To return to the main page of the form, on the left column, click on **General**.

![General tab](image)

Again, once the form is completed, with supporting documents if necessary, **Submit the form.**
DDP1 Purpose:

ADD AN INDIVIDUAL, NOT KNOWN TO TABS, TO A PROGRAM:

The Add process, shown below, registers a new individual and adds a program for the same individual. Again this process should only be used for FSS programs clearly denoted as not needing eligibility prior to the Add.

NOTE: The Register process, only registers, a new individual. This should not be used except if directed by the local DDSO to do so. Eligibility processes and/or paperwork must still be filed as directed by the DDSO.

Go to Forms, in the navigation column on the left side of the screen.

Click on DDP1-Registration/Movement Form under this column heading.

The content pane will now list active DDP1’s.

“New” appears as the first button on the ribbon displaying above the Workplace Column. Click New.
The following is the screen that will display. It is a Lookup. Please be sure you have all correct information, verify the spelling of the Individual’s name, Social Security number and Medicaid number from good documents. (For more detailed instructions on conducting a Lookup please see the Individual Lookup Step by Step guide.)

- Type in the Individual’s name
- And at least one of the identifying numbers, either the Social Security or Medicaid number

Once the Lookup box has enough information, the Lookup button in the lower right will activate.

Click Lookup.

**NOTE:** 2 results are possible, both are shown below.
1. If the Individual, is truly an unknown name and matching number to TABS, the following message displays,

*Your query did not return any results.*

Click on the “**New Individual**” button in the lower right.

A new DDP1 will display with the name and number you input to the Lookup box.

**Complete the DDP1 for the new Individual.**
Once completed:

- Add any **Supporting Documents**, if necessary
- Go to **Form Actions** and **Submit** the form.

2. *If you get a return of information showing the Individual's name, TABS and such, then the Individual is known to TABS, but not your agency. Follow the instructions below as to how to open a DDP1 for the Individual.*

From the information displayed, click on the TABS ID **number**.

Notice the **number** is **blue**, it is a hyperlink.

The DDP1 will open with the Individual's information populated.

**Complete the DDP1 for the program you are adding the Individual to.**

Upload any supporting documents if necessary. Then go to **Form Actions** and **Submit** the form.
NOTE: If the Individual is not yet being served by your agency, the Individual’s record will not be available to the agency until the Add to Program has been approved. But this form will be on the list of Active DDP1s for your agency.

Submission Information and Processing Information

These sections may appear or function differently depending on your role in CHOICES.

The Submission Information section is automatically populated with the name and phone number of the user signed into CHOICES. Date Completed is also automatically populated, but can be edited.

All forms submitted in CHOICES, are password protected. This means in order for any form to be submitted to the DDSO, or have an electronic signature applied and submitted, the user will need to fill in their password.
Go to **Form Actions**, click **Submit**.

The **Form Submission** box appears.

Enter your password.

Click **Submit**

The form will “blink” which is normal and then close. A copy is filed on the Individual’s record, or the DDP1 list if the Individual is not yet known to your agency. And the form has also been submitted to the DDSO for processing.

Congratulations! Your DDP1-Registration/Movement Form has been successfully submitted.