

## Adding a New Individual to a Program; But are They Known to TABS?

### Individual Lookup

Before creating a record for a new Individual, it is necessary to do an “Individual Lookup” to avoid duplicate records. **The Individual Lookup will search only for Individuals already known to TABS.**

**NOTE:** The Lookup Function should be done through the following forms:

DDP1

MSC1

MSC2

To do an Individual Lookup:

In the Workplace column, under Forms:

Click on DDP1 – Registration/Movement

Click the “New” button in the upper left part of the screen

Name	Created By	Agency Name	Add TABS Progr...	Remove TABS Pr...	Approved Effic...	Form Status	Purpose
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS		FSS- IN-HOME RE!		Saved	Remove
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS		FSS- IN-HOME RE!		Submitted	Died
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS		FSS- IN-HOME RE!		Submitted	Died
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS		FSS- IN-HOME RE!		Saved	Died
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS	BILLS DELETION TE	FSS- IN-HOME RE!		Submitted	Transfer With
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS	BILLS DELETION TE	FSS- IN-HOME RE!		Saved	Transfer With
DDP1 for ADAMS,JESSICA	TestCAY033 TestC	CAYUGA CO. NYS	02610909 -- BILL'S			Saved	Add
DDP1 for ADAMS,JESSICA	TestCAY020 TestC	CAYUGA CO. NYS	BILLS DELETION TE			Submitted	Add
DDP1 for ADAMS,JESSICA	TestCAY020 TestC	CAYUGA CO. NYS	BILLS DELETION TE			Saved	Add
DDP1 for ADAMS,JESSICA	TestCAY020 TestC	CAYUGA CO. NYS	BILLS DELETION TE			Saved	Moved out of
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS	BILLS DELETION TE			Submitted	Add
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS	BILLS DELETION TE			Submitted	Add
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS		FSS- IN-HOME RE!		Saved	Moved out of
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS		FSS- IN-HOME RE!		Submitted	Remove
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS		FSS- IN-HOME RE!	6/21/2012	Submitted	Died
DDP1 for ADAMS,JESSICA	testCAY006 TestC	CAYUGA CO. NYS	CAYUGA ARC SUPI			Saved	Add

The Individual Lookup screen opens:

**General**

**Lookup by TABS ID**

TABS ID \*

**Lookup by other criteria**

Last Name \*  First Name

Social Security Number \*  Medicaid CIN \*

County  Sex

Date Of Birth

All fields with the **red** asterisk are required, except if you are a DDSO user.

Individual's last name is all that is required for a **DDSO user**.

If you are a **Voluntary Agency user** you must enter the individual's last name and at least one of the three required fields.

**NOTE:**

If searching by TABS ID, the search will return the correct individual regardless of last name.

If searching by SSN or Medicaid CIN the last name has to have the correct spelling or the individual will not be found. If you are not sure how the name should be spelled, try entering a partial last name along with one of the required fields.

**Example:**

Lookup by other criteria	
Last Name	Eva
Social Security Number	000-01-5555

 = 

TABS ID	Name
15555	EVANCO, Annie

Also note that the “**Lookup**” button is disabled until you input enough information to conduct the Lookup.

The screenshot shows a web form with two main sections: "Lookup by TABS ID" and "Lookup by other criteria".

- Lookup by TABS ID:** A single text input field labeled "TABS ID" with a red asterisk next to it.
- Lookup by other criteria:** A grid of input fields:
  - Last Name: Text input with a red asterisk.
  - First Name: Text input.
  - Social Security Number: Text input with a red asterisk.
  - Medicaid CIN: Text input with a red asterisk.
  - County: Dropdown menu.
  - Sex: Dropdown menu.
  - Date Of Birth: Text input.

At the bottom right, there are two buttons: "Lookup" and "New Individual". The "Lookup" button is greyed out and circled in red, indicating it is disabled.

The example shown is for Dawn Berry.

As you fill in certain fields, whose information must be typed in a **specific format**, such as the **Social Security Number & Medicaid CIN**, you will get what appears to be an error message.

But the message is only displaying the **correct the format** for that field.

The screenshot shows a web form with a yellow error banner at the top that reads: "Social Security Number is invalid. It must be in the format '###-##-####' (e.g. 123-45-6789)." Below the banner, the form is divided into two sections: "Lookup by TABS ID" and "Lookup by other criteria". The "Lookup by other criteria" section contains several input fields: Last Name (filled with "berry"), Social Security Number (filled with "876"), County (a dropdown menu), Date Of Birth (empty), First Name (empty), Medicaid CIN (empty), and Sex (a dropdown menu). At the bottom right, there are two buttons: "Lookup" and "New Individual".

Once the necessary fields are completed, the Lookup button becomes available: Click the **"Lookup"** button.

This screenshot shows the same web form as above, but with the "Social Security Number" field now filled with "876-45-3465". The "Lookup" button at the bottom right is now highlighted with a red circle, indicating it is active and available for clicking.

**Possible results:**

1. **“Your query did not return any results.”** is the correct response to inform us: **This Individual does *not yet exist in CHOICES* and most probably TABS.**

(Typographical errors or incorrect information provided, could give a false result.)

The yellow banner displays the Lookup results.

**Your query did not return any results.**

**Lookup by TABS ID**

TABS ID

**Lookup by other criteria**

Last Name  First Name

Social Security Number  Medicaid CIN

County  Sex

Date Of Birth

Lookup New Individual

The “New Individual” button becomes available if you want to Add to a Program or register a New Individual. *This will be done only for a very few FSS programs.*

**NOTE:** Please follow DDSO procedures for registration of a new Individual. Most Individuals need OPWDD eligibility prior to be added to a program.

DDP1 - Registration/Movement Form: New - Microsoft Dynamics CRM - Windows Internet Explorer provided by New York State OPWDD

OPWDD - CHOICES TestCAY033 TestCAY033 choicestest1

File DDP1 - Registration/Movement Form Form Actions

Save Save & Close Save & New Copy a Link E-mail a Link Collaborate Run Workflow Start Dialog Run Report Help On This Page

Information General

Related Common Activities Closed Activities Supporting Documents Processes Workflows

DDP1 - Registration/Movement Form New

**Your query did not return any results.**

**Lookup by TABS ID**

TABS ID

**Lookup by other criteria**

Last Name  First Name

Social Security Number  Medicaid CIN

County  Sex

Date Of Birth

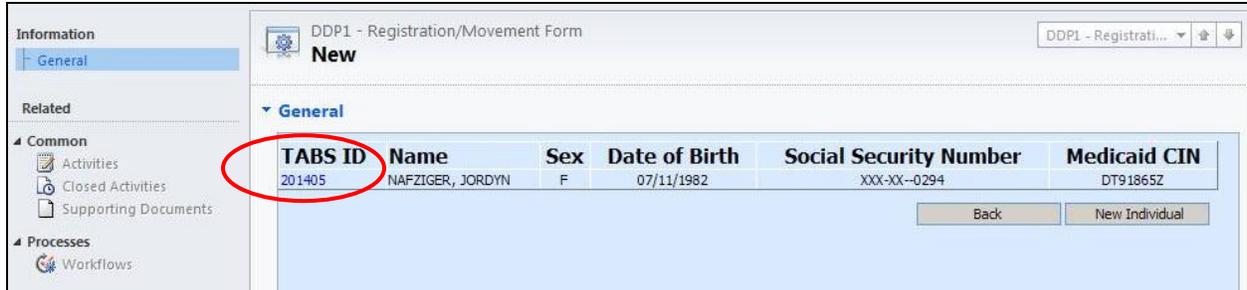
Lookup New Individual

The DDP1 will display with the name and number you already entered, so now you can finish the DDP1 for what is truly a New Individual to TABS, not just the Agency.

The screenshot shows the 'OPWDD - CHOICES' application window. The title bar indicates the user is logged in as 'TestCAY033 TestCAY033' with the session name 'choicestest1'. The interface includes a ribbon menu with 'File' and 'Form Actions' tabs. The 'File' tab contains options like 'Save', 'Save & Close', and 'Save & New'. The 'Form Actions' tab includes 'Run Workflow', 'Start Dialog', 'Run Report', and 'Help On This Page'. On the left, there is a navigation pane with 'Information' (General, Notes) and 'Related' (Common, Processes) sections. The main content area is titled 'DDP1 - Registration/Movement Form' and shows a 'New' record. The 'General' section is expanded, showing the 'Purpose Of DDP1' (set to 'Add') and 'Individual Information' fields. The 'Individual Information' section includes fields for Individual (lookup), Last Name (\*, filled with 'berry'), Middle Initial, Sex (\*), Social Security Number (+, filled with '876-45-3465'), Ethnicity/Race, Individual's Residence Type (\*), County Of Residence (\*, lookup), Address Line 1 (+), City (+), Zip (+), TABS ID (+), First Name (\*), Date Of Birth (\*, calendar), Medicaid Number (+), Specify Other Residence Type, Address Care Of, Address Line 2 (+), State (+), and Date of Registration (\*, calendar).

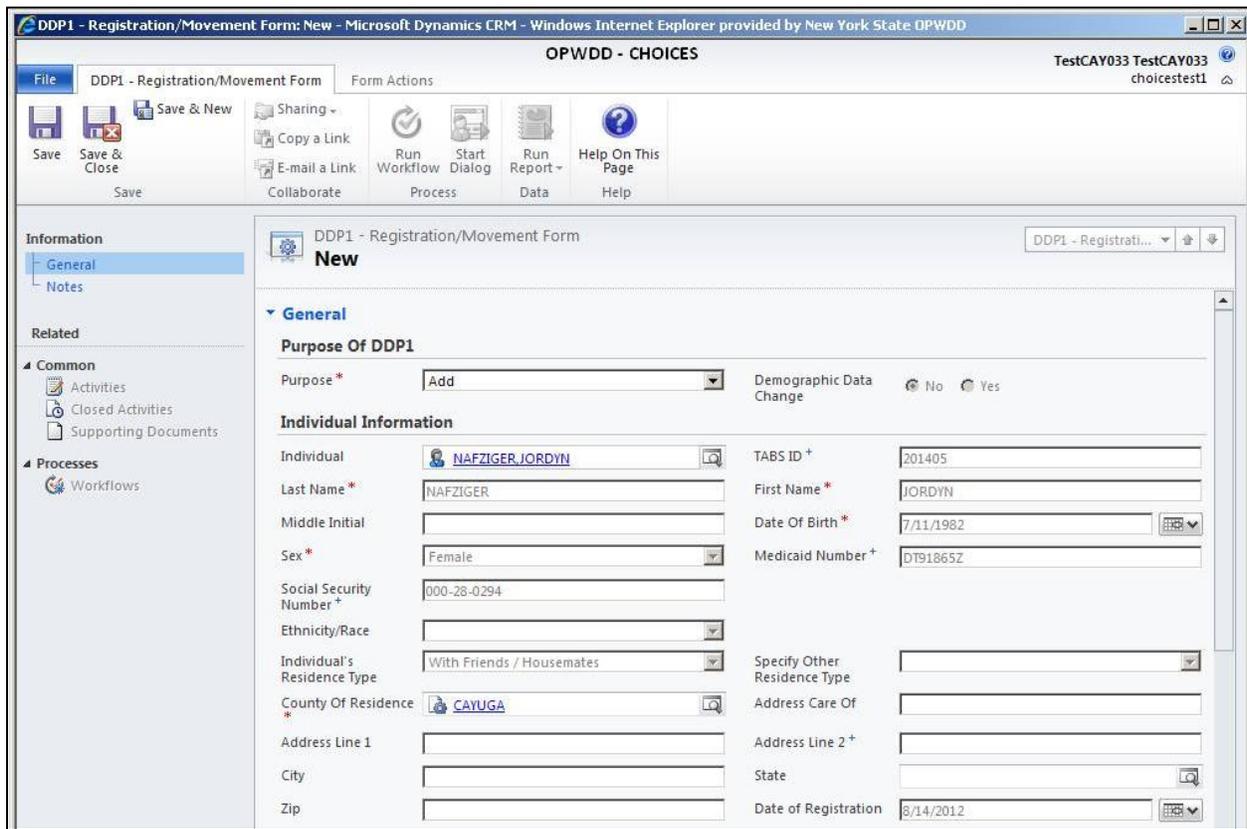
**TIP:** After completing the Individual Lookup through TABS, you may also want to check the DDP1 central list, to ensure no one at your agency began a DDP1, saved it and then did not submit the DDP1 to “Register the Individual”. That second saved DDP1 that has not been submitted will just stay as a saved record.

- The **other possible result** of the search is that the Individual is known to TABS, but not yet the agency! User will see some of the Individual's information and the TABS ID.



**Double click on the Blue TABS ID**

The DDP1 opens and automatically populates with all the information known to TABS. The agency will need to scroll down the form to "Add to Program" and then continue with all other required fields.

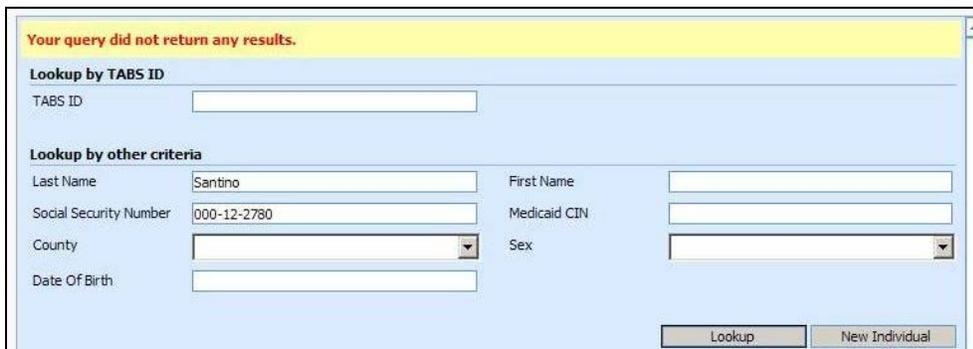


## AGENCIES:

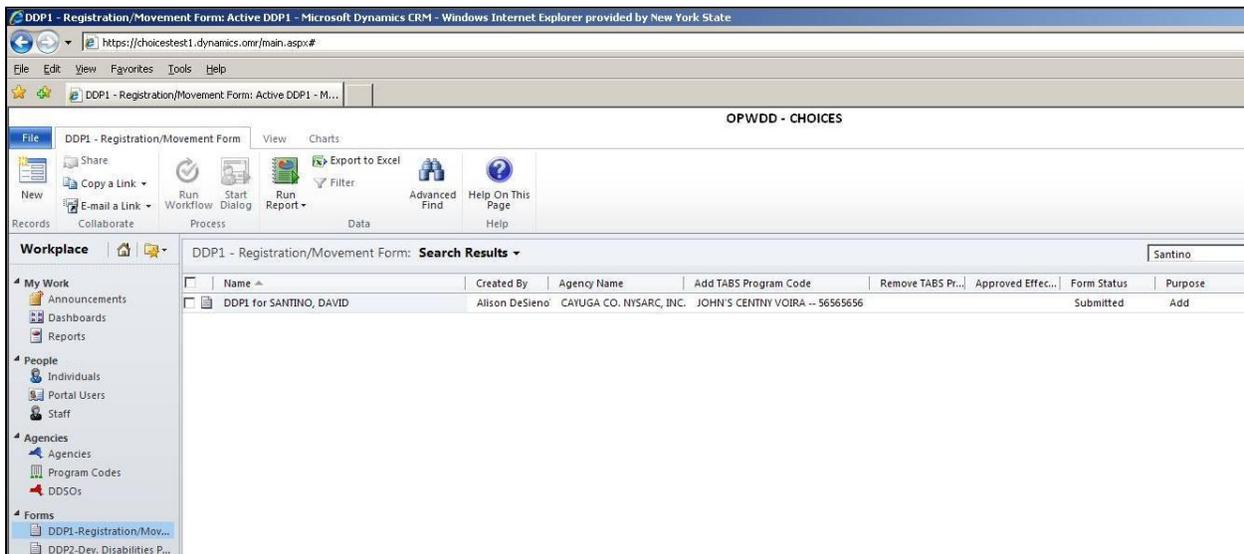
To ensure you have not yet begun to serve the Individual, check the *Individuals* section. Example: Search for David Santino through the “Individuals” link in the Workplace



And if we do a lookup with the result “did not return any results”, then David Santino is not known to TABS.



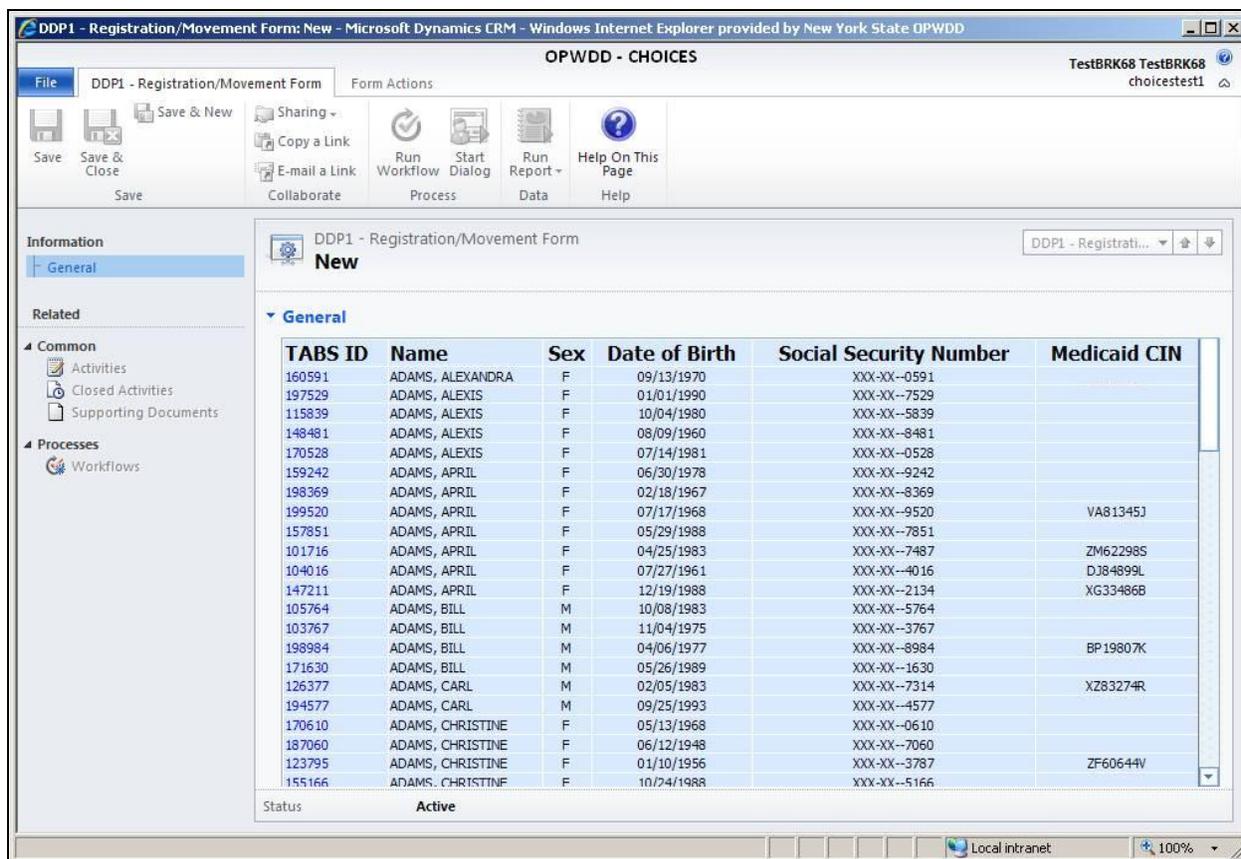
But by doing a simple search in the DDP1 list, we find a coworker started to put John in, Saved it, and stopped.



## For DDSO Users Only:

**Another possible result** is the search returns more than one record, since the DDSO users need to enter only a last name as the search criteria.

Below is the result of the example of using only the last name of “Adams”.



The screenshot shows a Microsoft Dynamics CRM window titled "DDP1 - Registration/Movement Form: New". The interface includes a menu bar with "File" and "Form Actions", a ribbon with various icons, and a left-hand navigation pane. The main content area displays a "New" record for "DDP1 - Registration/Movement Form" with a "General" tab selected. Below the tab, a table lists search results for individuals with the last name "Adams". The table has columns for TABS ID, Name, Sex, Date of Birth, Social Security Number, and Medicaid CIN. The "TABS ID" column is highlighted in blue for each row. The status at the bottom of the table is "Active".

TABS ID	Name	Sex	Date of Birth	Social Security Number	Medicaid CIN
160591	ADAMS, ALEXANDRA	F	09/13/1970	XXX-XX--0591	
197529	ADAMS, ALEXIS	F	01/01/1990	XXX-XX--7529	
115839	ADAMS, ALEXIS	F	10/04/1980	XXX-XX--5839	
148481	ADAMS, ALEXIS	F	08/09/1960	XXX-XX--8481	
170528	ADAMS, ALEXIS	F	07/14/1981	XXX-XX--0528	
159242	ADAMS, APRIL	F	06/30/1978	XXX-XX--9242	
198369	ADAMS, APRIL	F	02/18/1967	XXX-XX--8369	
199520	ADAMS, APRIL	F	07/17/1968	XXX-XX--9520	VA81345J
157851	ADAMS, APRIL	F	05/29/1988	XXX-XX--7851	
101716	ADAMS, APRIL	F	04/25/1983	XXX-XX--7487	ZM62298S
104016	ADAMS, APRIL	F	07/27/1961	XXX-XX--4016	DJ84899L
147211	ADAMS, APRIL	F	12/19/1988	XXX-XX--2134	XG33486B
105764	ADAMS, BILL	M	10/08/1983	XXX-XX--5764	
103767	ADAMS, BILL	M	11/04/1975	XXX-XX--3767	
198984	ADAMS, BILL	M	04/06/1977	XXX-XX--8984	BP19807K
171630	ADAMS, BILL	M	05/26/1989	XXX-XX--1630	
126377	ADAMS, CARL	M	02/05/1983	XXX-XX--7314	XZ83274R
194577	ADAMS, CARL	M	09/25/1993	XXX-XX--4577	
170610	ADAMS, CHRISTINE	F	05/13/1968	XXX-XX--0610	
187060	ADAMS, CHRISTINE	F	06/12/1948	XXX-XX--7060	
123795	ADAMS, CHRISTINE	F	01/10/1956	XXX-XX--3787	ZF60644V
155166	ADAMS, CHRISTINE	F	10/24/1988	XXX-XX--5166	

To ensure you choose the correct individual, you will need other identifying information such as the date of birth.

You can click on the **TABS ID number** highlighted in blue, to open the Individual's record to check address or other information to positively identify that you have selected the right "Adams".