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

The Individual Lookup screen opens:
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:**

```
<table>
<thead>
<tr>
<th>Lookup by other criteria</th>
<th>TABS ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Eva</td>
<td>EVANCO, Annie</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>000-01-5555</td>
<td>15555</td>
</tr>
</tbody>
</table>
```

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

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

![Lookup Results Banner](image)

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.
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.

**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.
2. 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.

![DDPI Image]

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.

![DDPI Image]
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”.

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”.