

## Navigation & Terminology

This section will familiarize the user on the methods used to navigate through the CHOICES System.

### Sign In

To Sign into CHOICES, either use the following URL:

<https://choices.opwdd.ny.gov>

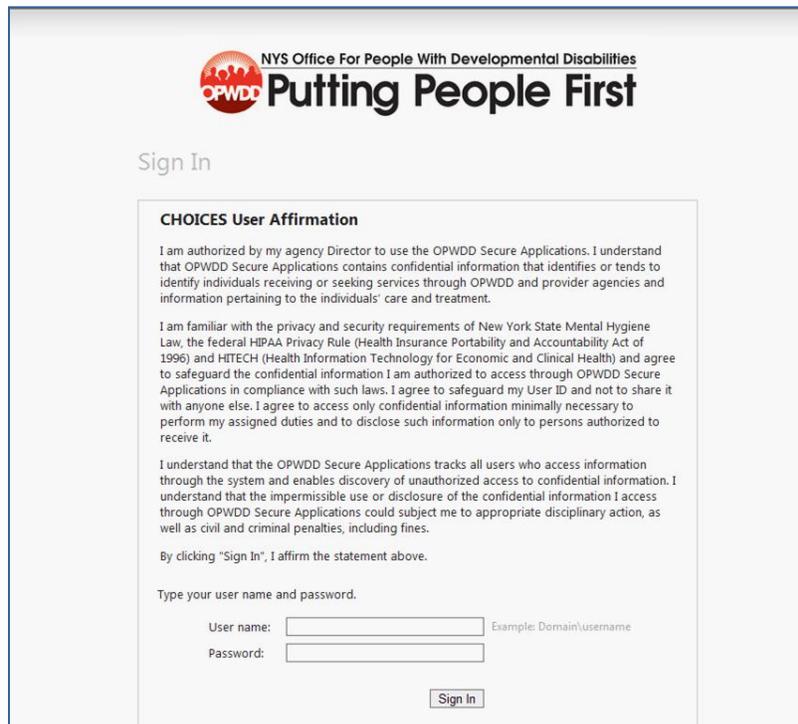
Or, Sign In, at the OPWDD website, <http://www.opwdd.ny.gov> , Login, CHOICES

A realm page will display, select the appropriate option, Voluntary agencies will select Non OPWDD...

Then click “Continue to Sign In”

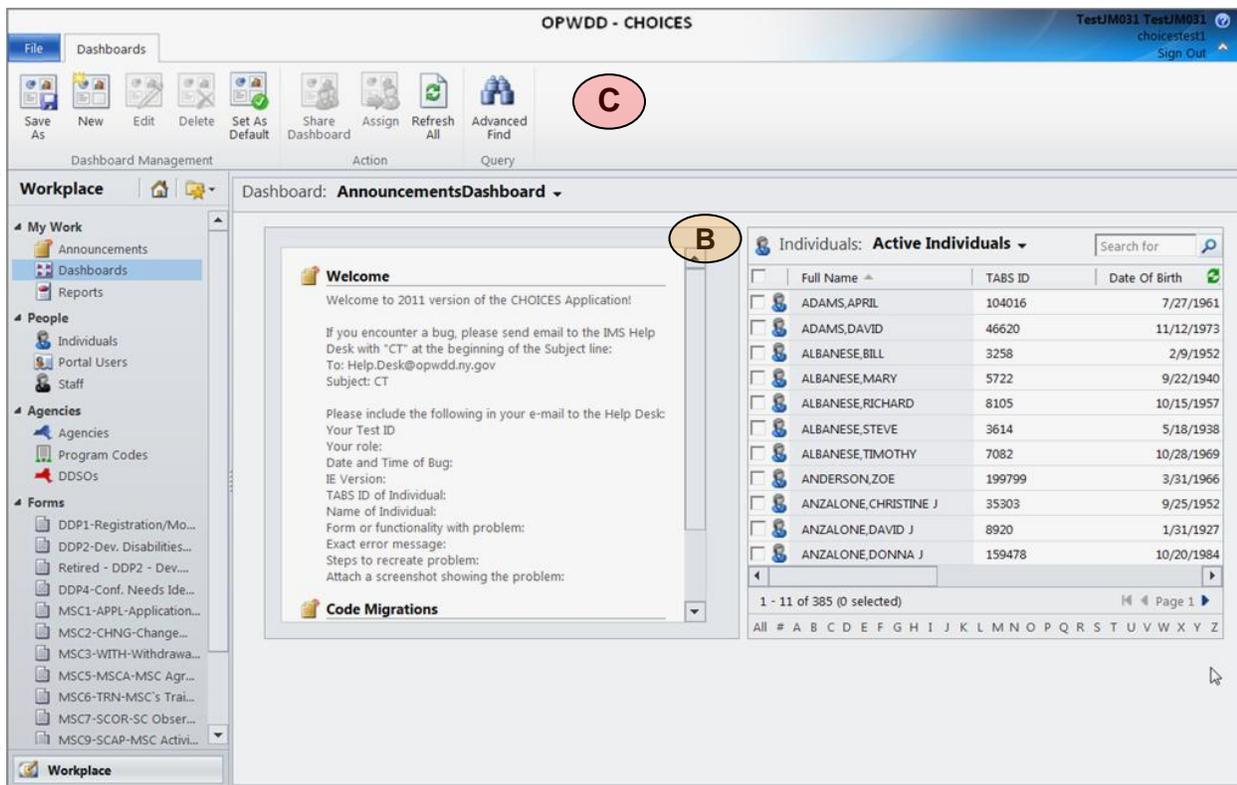


Please read the Affirmation and then enter your user name and password, then click the **Sign In**



If successful, you will be brought to the **Dashboards** screen for CHOICES.

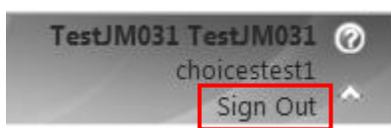
There is an option to change your default pane. Please see the Step by Step, **View User Profile**.



- A** The Workplace Menu or navigation column is how to move around inside the application
- B** The content pane displays whatever folder you have highlighted in the Workplace Menu
- C** Ribbon which contains all the actions necessary for *the section selected* in Workplace
- D** Display of the user signed on to the system and the **Sign Out** Area.

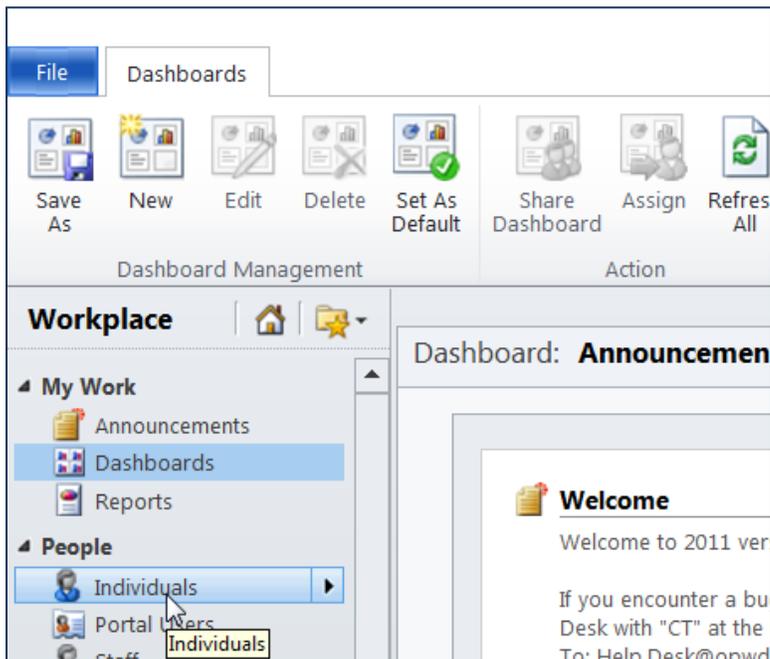
**Note:** Items displayed in the Workplace column are based on whether you are an Agency or DDSO staff and the role you have within CHOICES.

When finished working in CHOICES, please be sure to disconnect by using the **Sign Out**.

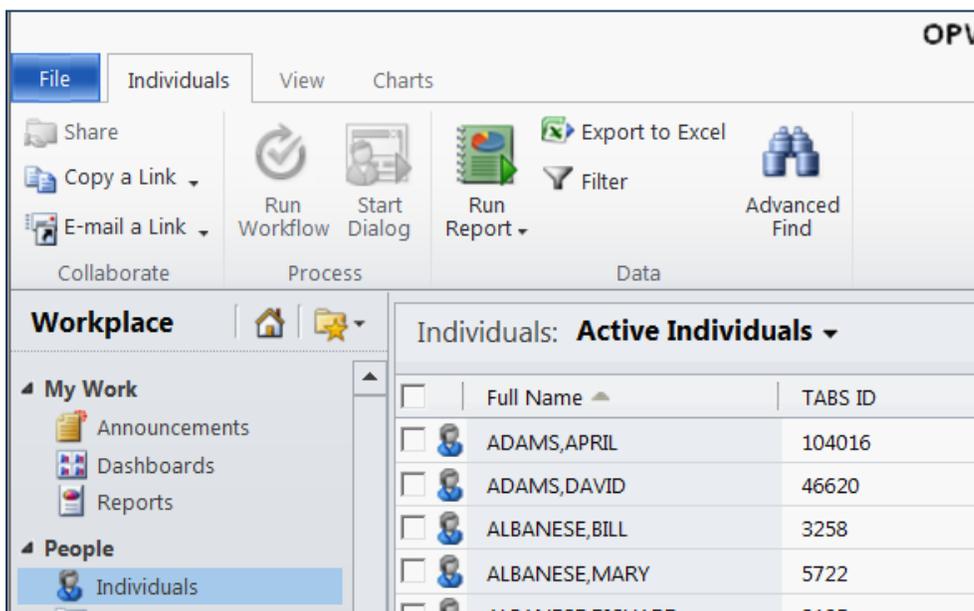


## Navigation

To move to (or display) another folder, place your cursor over the selected folder and click. In this example, we are moving from the Dashboards folder to the Individuals folder.



As you navigate to another folder (section), the ribbon will change to display the correct functions available for that particular folder. Please note the difference in the ribbons in the Dashboards section above and the Individuals below.



For the folder, *Individuals*, we rarely use any of the ribbon buttons.

The *Individuals* section displays everyone that is known to TABS and served by the agency.

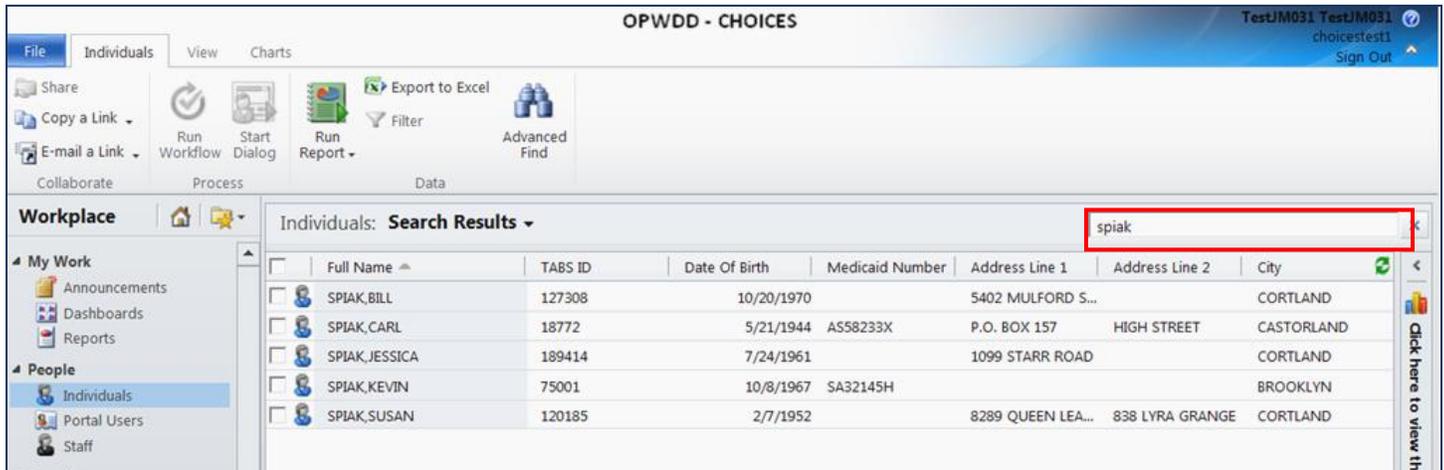
DDSO *Individuals* section, will have all *Individuals* known to TABS.

## Selection of a Record

To find a specific Individual:

In the box to the right, above the list of Individuals, type the last name, or last and first name of the Individual using a comma and no spaces, click the Enter key or click the Find icon 

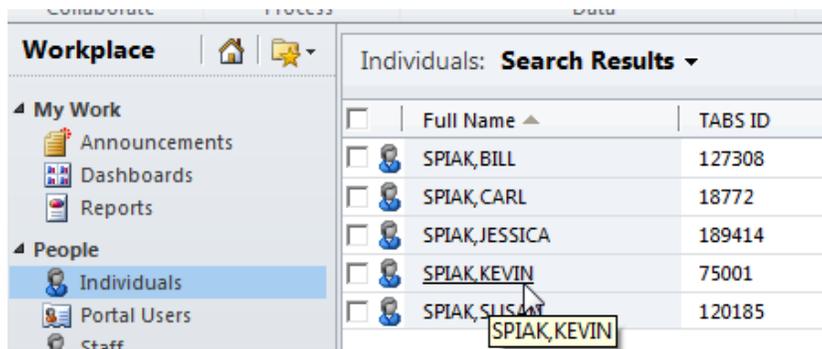
(In the graphic below, the search box is highlighted in red)



The screenshot shows the 'OPWDD - CHOICES' application interface. The search box at the top right contains the text 'spiak' and is highlighted with a red border. Below the search box, a table displays search results for individuals with the last name 'SPIAK'.

Full Name	TABS ID	Date Of Birth	Medicaid Number	Address Line 1	Address Line 2	City
SPIAK,BILL	127308	10/20/1970		5402 MULFORD S...		CORTLAND
SPIAK,CARL	18772	5/21/1944	AS58233X	P.O. BOX 157	HIGH STREET	CASTORLAND
SPIAK,JESSICA	189414	7/24/1961		1099 STARR ROAD		CORTLAND
SPIAK,KEVIN	75001	10/8/1967	SA32145H			BROOKLYN
SPIAK,SUSAN	120185	2/7/1952		8289 QUEEN LEA...	838 LYRA GRANGE	CORTLAND

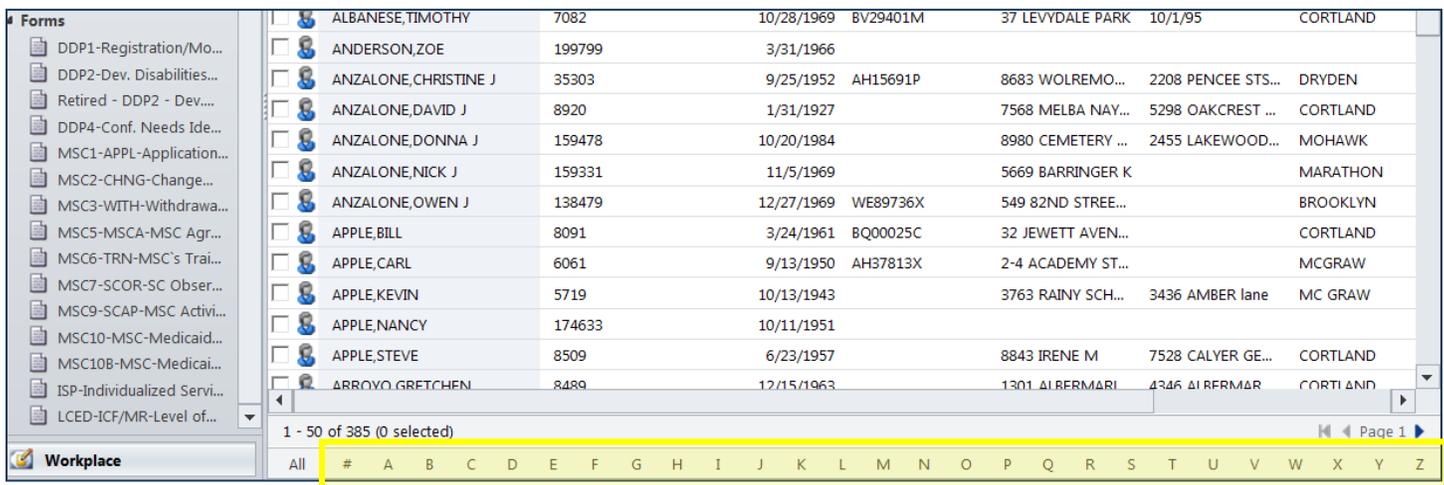
From the list of Individuals displayed by last name, click on the correct Individual's name to open their record...



The screenshot shows the 'OPWDD - CHOICES' application interface. The search results table is displayed, and the entry for 'SPIAK,KEVIN' is highlighted. A mouse cursor is pointing at the name, and a tooltip shows 'SPIAK,KEVIN'.

Full Name	TABS ID
SPIAK,BILL	127308
SPIAK,CARL	18772
SPIAK,JESSICA	189414
SPIAK,KEVIN	75001
SPIAK,SUSAN	120185

Or you can search by clicking the first letter of the last name at the bottom of the screen



The screenshot shows the 'OPWDD - CHOICES' application interface. The search results table is displayed, and the entry for 'APPLE,KEVIN' is highlighted. At the bottom of the screen, an alphabetical index is visible, with the letters 'A' through 'Z' highlighted in yellow.

Full Name	TABS ID	Date Of Birth	Medicaid Number	Address Line 1	Address Line 2	City
ALBANESE,TIMOTHY	7082	10/28/1969	BV29401M	37 LEVYDALE PARK		CORTLAND
ANDERSON,ZOE	199799	3/31/1966				
ANZALONE,CHRISTINE J	35303	9/25/1952	AH15691P	8683 WOLREMO...	2208 PENCEE STS...	DRYDEN
ANZALONE,DAVID J	8920	1/31/1927		7568 MELBA NAY...	5298 OAKCREST ...	CORTLAND
ANZALONE,DONNA J	159478	10/20/1984		8980 CEMETERY ...	2455 LAKEWOOD...	MOHAWK
ANZALONE,NICK J	159331	11/5/1969		5669 BARRINGER K		MARATHON
ANZALONE,OWEN J	138479	12/27/1969	WE89736X	549 82ND STREE...		BROOKLYN
APPLE,BILL	8091	3/24/1961	BQ00025C	32 JEWETT AVEN...		CORTLAND
APPLE,CARL	6061	9/13/1950	AH37813X	2-4 ACADEMY ST...		MCGRAW
APPLE,KEVIN	5719	10/13/1943		3763 RAINY SCH...	3436 AMBER lane	MC GRAY
APPLE,NANCY	174633	10/11/1951				
APPLE,STEVE	8509	6/23/1957		8843 IRENE M	7528 CALYER GE...	CORTLAND
ARROYO,GRETCHEN	8489	12/15/1963		1301 AIRFERMARI	4346 AIRFERMAR	CORTLAND

Once the Individual's record is opened, move to any of the sections (folders) by placing your cursor to highlight, and then click.

In this example, we moved to Kevin's DDP1 section (Graphic below)

The screenshot shows the 'Individual' record for SPIAK, KEVIN. The 'Related' sidebar on the left is expanded to show 'DDP1 - Registration/M...'. The main content area displays the 'General' section with the following information:

Individual Information	
Last Name *	SPIAK
First Name *	KEVIN
Middle Initial	
Full Name	SPIAK, KEVIN
Date Of Birth *	10/8/1967
Sex	Male
Ethnicity	Hispanic
Phone Number	
Cell Phone Number	
Email	
Social Security Number	000-07-5001
Medicaid Number	SA32145H
Medicare Number	
TABS ID	75001

### An example of a Section ribbon

All the Form Sections' ribbons are the same.

Other sections have specific functions available as needed.

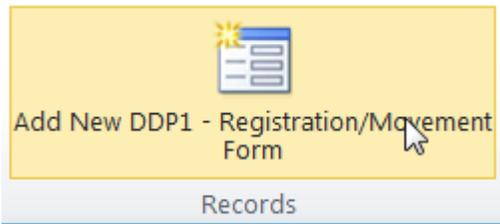
The screenshot shows the 'DDP1 - Registration/Movement Form' ribbon for the individual SPIAK, KEVIN. The ribbon contains various tools and options. Below the ribbon is a table of records:

Name	Created By	Agency Name	Add TABS Progra...	Remove TABS Pr...	Approved Effectiv...	Form Sta
DDP1 for SPIAK, KEVIN	TestJM031 TestJM0	J. M. MURRAY CEN	4057 WEST ROAD -			Submitted
DDP1 for SPIAK, KEVIN	TestJM031 TestJM0	J. M. MURRAY CEN	BROOKLYN S.W.A.T		7/2/2012	Returned
DDP1 for SPIAK, KEVIN	TestJM031 TestJM0	J. M. MURRAY CEN	CARL FENICHEL PRE		7/5/2012	Approved

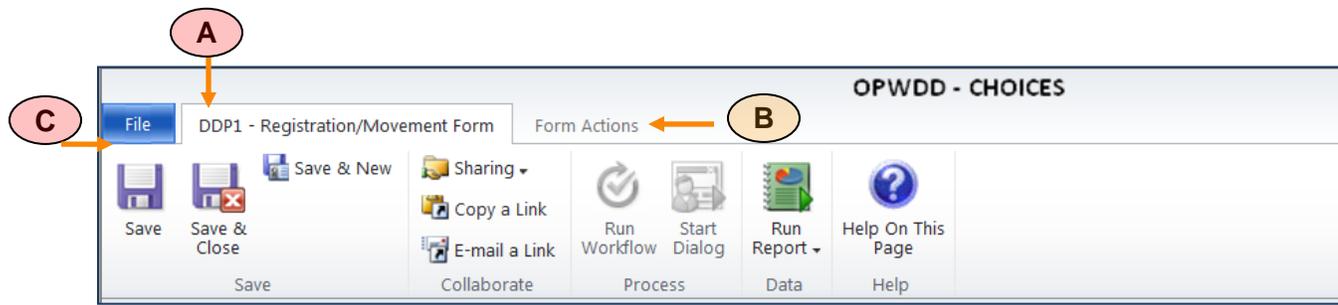
The “Add New...Form” is on the left side of the ribbon. (On the graphic, highlighted in red)



In the example of the DDP1 section, hover over the button to highlight, then click the button and a new form will display.



### An example of a *Form* ribbon



- A** The first *tab*, A, on the ribbon has the Save functions, Sharing function, if your role allows you to share a form you created, Help on this Page, the other buttons' functions are non existent
- B** The second *tab*, B, has the Actions possible for the form, Submit, Copy, View PDF... For DDSO staff, also, Process Form, Return...
- C** The third *tab*, C, has duplicate functions from the first 2 tabs and some general actions, this tab is rarely used in conjunction with the forms.

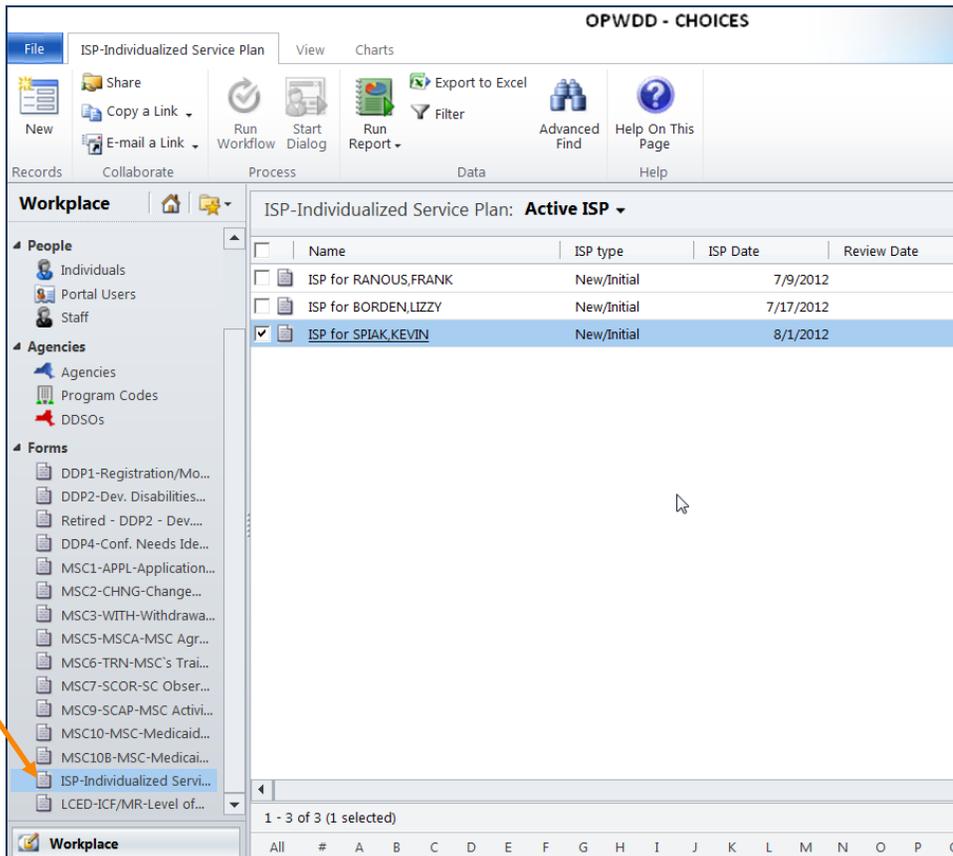
**NOTE:** Depending on your role, the different *Form Actions* buttons will be available.



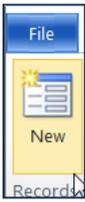
Once the form is saved, you will be able to view and use the **View PDF** and **Copy** buttons.

- A** Submit form to DDSO
- B** Create a PDF version of the form for viewing and printing
- C** Copy forward to create an editable copy of an existing form

## Icons



When in the *Forms* list, in the Workplace, the ribbon has buttons available to allow user to navigate through the list to a specific record or to create a New form. Example above, is the *ISP* list for the whole agency.



File, New, is to create a New Record for an Individual NOT known to your agency



Share, is to share the selected record, such as an ISP, with other CHOICES users.



Displays a list of the pages you recently looked up

Recently viewed pages and views (Ctrl+Shift+7)



Returns user to the Dashboards (Home) Page

Go to your Home page

Other icons have no function for CHOICES at this time.

## [Navigating to other sections](#)

### [Agencies](#)

In the Agencies section you can find information about **Agencies**, **Program Codes** and **DDSOs**. Place your cursor to highlight the section and click. Select a record by clicking on the name of the record to open.

The screenshot shows the software interface with the following components:

- Top Navigation:** File, Agencies, View, Charts
- Collaborate:** Copy a Link, E-mail a Link
- Process:** Run Workflow, Start Dialog, Run Report
- Data:** Export to Excel, Filter
- Help:** Advanced Find, Help On This Page

**Workplace Sidebar:**

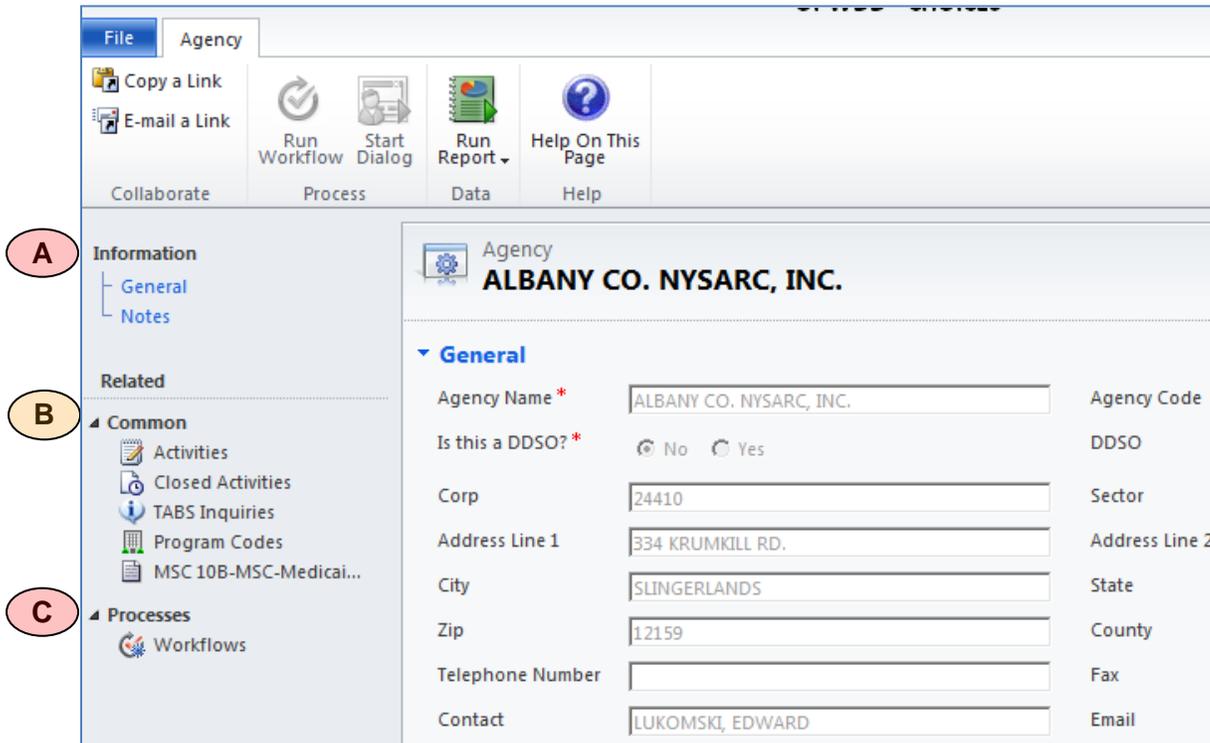
- My Work: Announcements, Dashboards, Reports
- People: Individuals, Portal Users, Staff
- Agencies:** Agencies (highlighted with an orange arrow), Program Codes, DDSOs

**Agencies: Active Agencies**

<input type="checkbox"/>	Agency Name ▲	Agency Code
<input type="checkbox"/>	ADVOCATES FOR SERVICES	79420
<input type="checkbox"/>	AGENCY ONE NAME	12111
<input type="checkbox"/>	AGENCY TWO NAME	12112
<input type="checkbox"/>	AGY	51910
<input type="checkbox"/>	AGY2	23456
<input type="checkbox"/>	AGY2	22222
<input type="checkbox"/>	ALBANY CO. NYSARC, INC.	71330
<input type="checkbox"/>	ALLEGANY CO. NYSARC, INC.	67920
<input type="checkbox"/>	ALLEGANY REGIONAL DEVELOPMENT CORP.	87440
<input type="checkbox"/>	AR23 TESTING BUG	66778

Once any record is open, there is a left hand column, similar to the Workplace on the main page. This left hand column displays the sections of the opened record.

Highlight and click on any section, to move to that section.



- A** The *Information* section, *General* is the main page of the open record, Notes if necessary or allowed on the type of record will be displayed
- B** *Common* refers to any Tasks available with the opened record. But, *Activities*, and *Closed Activates*, have no functionality for the basic user at this time.
- C** *Processes* is a system function and not available to the basic user

## [How to Search for a Record \(Returned Forms see P.14\)](#)

Records are located in the *Individuals* folder, and, on the Forms list in the *Forms* section.

## [Individuals](#)

To look up a record for a particular Individual, go to the *Individuals* section and search by name, click on the correct name to open the record.

	Full Name	TABS ID	Date Of Birth	Medicaid Number	Address Line 1	Address Line 2	City	Start search
<input type="checkbox"/>	ADAMS, APRIL	104016	7/27/1961	DJ84899L	4844 CELESTE AL...		BROOKLYN	
<input type="checkbox"/>	ADAMS, DAVID	46620	11/12/1973	CJ89598W	168 THOMPkins ...		CORTLAND	
<input type="checkbox"/>	ALBANESE, BILL	3258	2/9/1952	AT76577R	5958 OLD ONEID...	LINE 2 OF STREET...	ROME	
<input type="checkbox"/>	ALBANESE, MARY	5722	9/22/1940	AG44438Z	47 LENNEX DOW...		CORTLAND	
<input type="checkbox"/>	ALBANESE, RICHARD	8105	10/15/1957		2190 WALTERS L...		CORTLAND	
<input type="checkbox"/>	ALBANESE, STEVE	3614	5/18/1938		2711 NOMTGOM...		CORTLAND	
<input type="checkbox"/>	ALBANESE, TIMOTHY	7082	10/28/1969	BV29401M	37 LEVYDALE PARK	10/1/95	CORTLAND	

Once the record is open, all the Form sections, which your role allows you to see, will be displayed in the left hand column. Click to open any section, and all forms your agency created, will be displayed.

Individual: SPIAK, KEVIN

Information

- General
- Additional Information
- Notes

Related

- Common
  - Activities
  - Closed Activities
  - Supporting Documents
  - TABS Inquiries
  - Portal Users
  - Caseload Assignments
  - Program Enrollments
  - DDP1 - Registration/M...
  - Retired - DDP2 - Dev. ...
  - DDP2 - Dev. Disabilitie...
  - DDP4 - Conf. Needs Id...
  - MSC1-APPL-Applicatio...
  - MSC2-CHNG-Change ...
  - MSC3-WITH-Withdraw...

Individual Information

Last Name *	SPIAK	First Name *	KEVIN
Middle Initial		Full Name	SPIAK, KEVIN
Date Of Birth *	10/8/1967	Sex	Male
Ethnicity	Hispanic	Cell Phone Number	
Phone Number		Medicaid Number	SA32145H
Email			
Social Security Number	000-07-5001		
Medicare Number			
TABS ID	75001		

Status: Active

## Forms

Use the *Forms* section to search for a particular form.

There are *multiple Views* of each Form's list.

**Active** will display only those forms with an Active Status. For an agency, on the DDP1 example, that will be Saved and Submitted, meaning they are not finalized. And other forms may have additional Active Status, e.g. the ISP will have "In Process".

The screenshot shows the 'OPWDD - CHOICES' interface. The top navigation bar includes 'File', 'View', and 'Charts'. The 'File' menu is open, showing options like 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Filter', 'Export to Excel', 'Advanced Find', and 'Help On This Page'. The main workspace displays a list of forms under the heading 'DDP1 - Registration/Movement Form: Active DDP1'. A dropdown menu is open over the 'Active DDP1' view, showing options: 'System Views', 'Active DDP1', 'Inactive DDP1', 'Returned DDP1s submitted by me', and 'Create Personal View'. The form list includes columns for Name, Created By, Agency Name, and Add TABS Progra... The list contains several entries, including 'DDP1 for ALBANESE,BILL', 'DDP1 for DOYLE,MICHAEL P', 'DDP1 for SPIAK,KEVIN', and 'DDP1 for Sam, Sammy'.

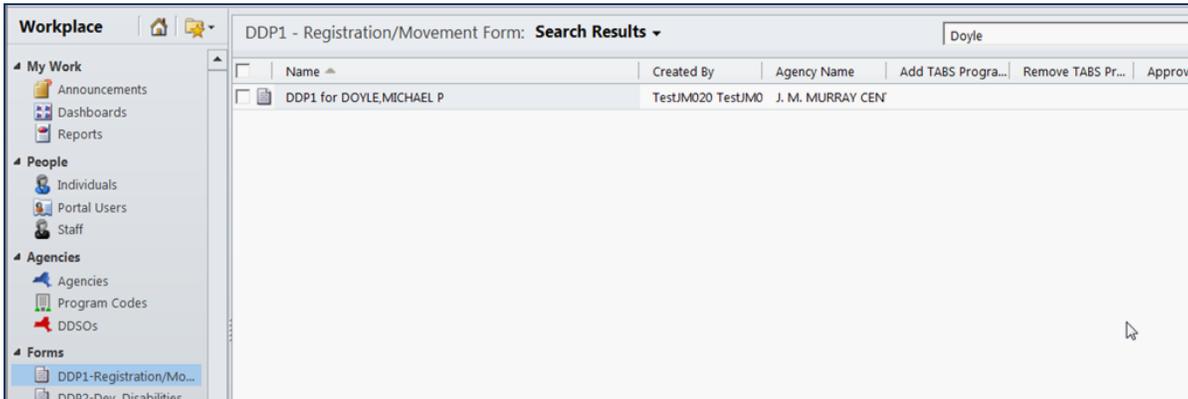
In the Active View, of any form list, you can search for all forms, of that type, for a particular Individual.

In this example I am searching for only Doyle's DDP1s.

The screenshot shows the 'OPWDD - CHOICES' interface with a search filter applied. The search bar at the top right contains the text 'Doyle'. The form list is filtered to show only forms created by 'Doyle'. The list includes columns for Name, Created By, Agency Name, Add TABS Progra..., Remove TABS Pr..., and Apprpd. The list contains several entries, including 'DDP1 for ALBANESE,BILL', 'DDP1 for DOYLE,MICHAEL P', 'DDP1 for SPIAK,KEVIN', and 'DDP1 for Sam, Sammy'.

**NOTE:** If the Individual is known to your agency, use the *Individual's* record to search for any forms. All forms created for an Individual reside on their record and copy over to the Forms list.

Displayed are the Search Results:



### Search for Forms created by a Particular User

This is a more common search, to find all the forms, such as DDP1s, you may have been working on.

The columns have heading buttons and each allows the user to sort the information by that field. Hover over the button to highlight and then click.

In this example, all the DDP1s are now sorted accordingly and grouped by the user who created the forms.



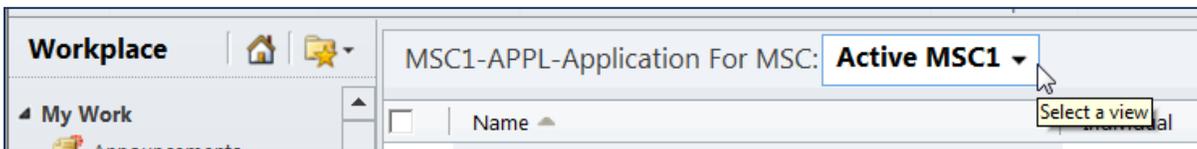
**NOTE:** Each search described above can be done for all Forms, sorted by any of the columns and done for any of the Views.

## Inactive

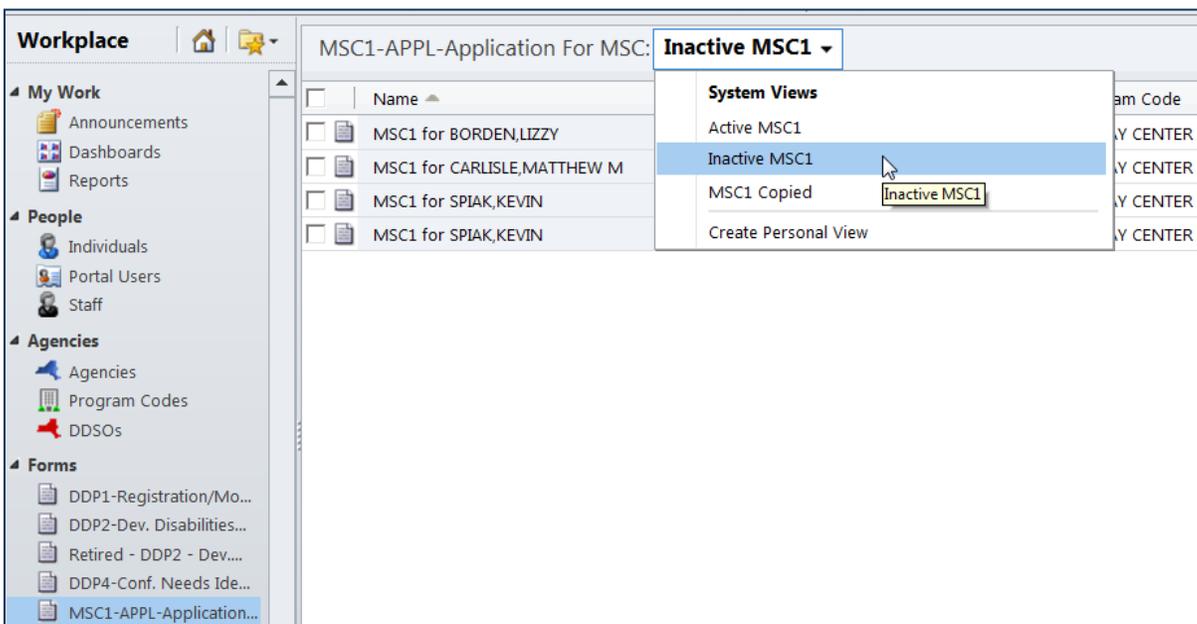
Inactive will display only those forms with an Inactive Status.

At the appropriate Forms list, change the View by hovering over the Active View to display other Views available for that list.

In this example we are using, MSC1.



Highlight the Inactive MSC1, or whichever list you are searching, and then click to display the all the Inactive forms.



Remember you can sort any list, by any column, by clicking on the column's heading button.

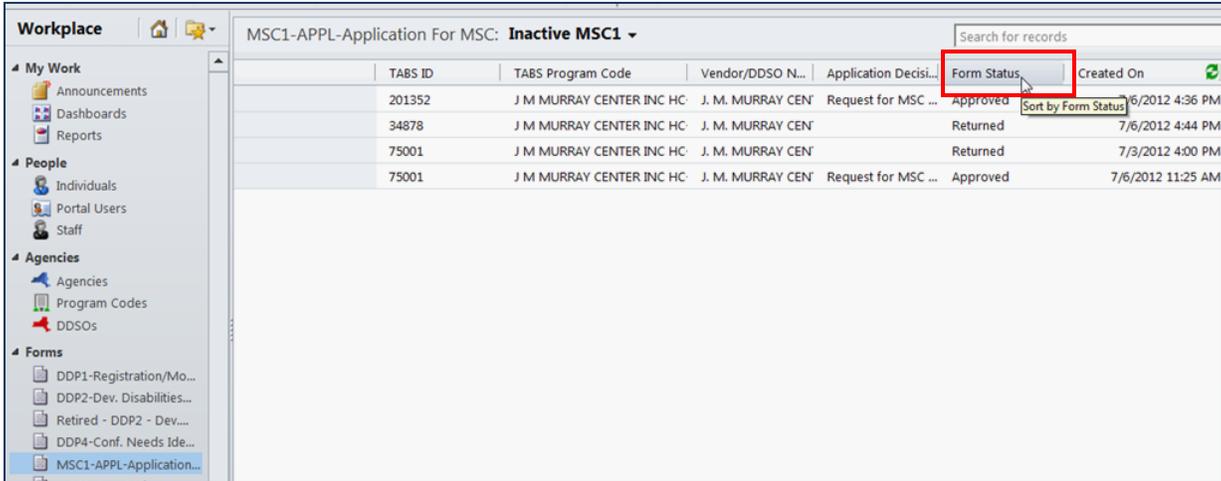


Clicking 2Xs on the column will re-sort the information by the latest date or last letter of the criteria of that column.

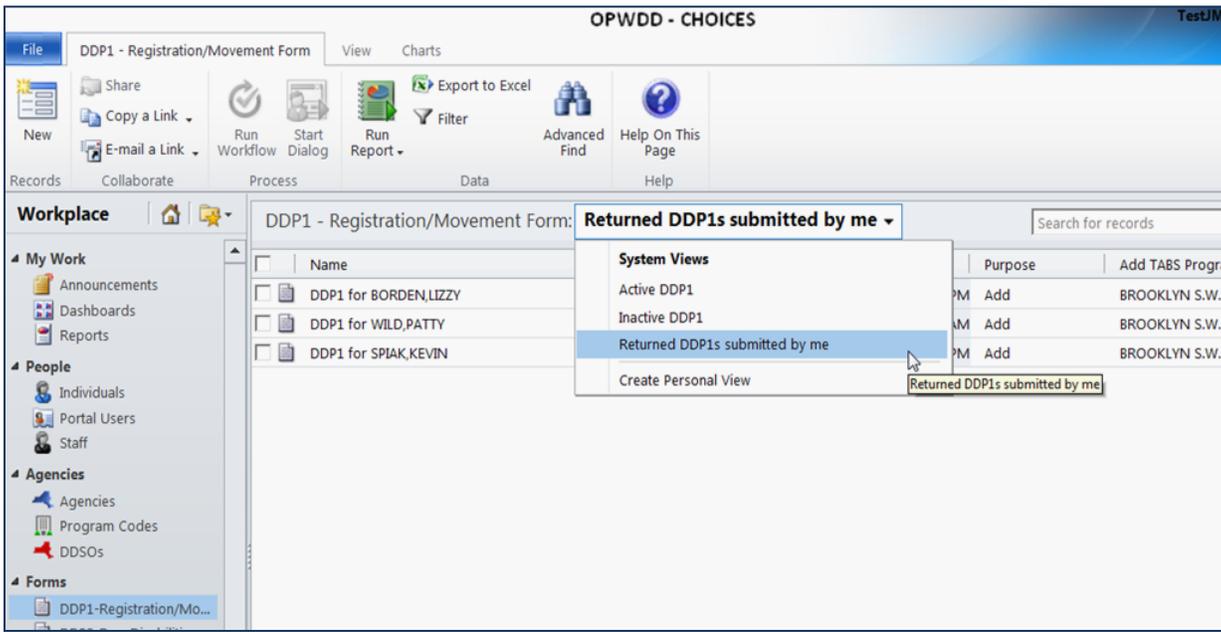
## To Search for a Returned Form

Go to the Inactive section of a Forms list, in the example MSC1.

*Returned forms* are always assigned a status of Inactive. Users will first be viewing all Inactive forms, not just Returned. Sort the list by clicking on Form Status.



The DDP1 Section, has a unique Returned DDP1s submitted by me (the user signed in)



**NOTE:** Returned forms can only be copied to resubmit. You cannot resubmit the original returned form, copy it and then fix the mistakes or upload the additional supporting documents.