

# **CHOICES Upgrade – What has changed from previous version**

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**NOTE:** If you are viewing this document before the upgrade, Previous version stands for version 4.0 and Current version stands for the upgraded version or CHOICES 2011.

## Login

Sign In

The site that you are accessing requires you to sign in. Select your organization from the following list.

Non OPWDD Employees

Continue to Sign In

When logging into the CHOICES application through the Sign In window, you must choose the appropriate realm from the drop down list based on whether you're using the application in the role of an OPWDD Employee or a Non-OPWDD Employee. Then click "Continue to Sign In".

Sign In

The site that you are accessing requires you to sign in. Select your organization from the following list.

Non OPWDD Employees

Non OPWDD Employees

OPWDD Employees

## Dashboards

**New Functionality –** There are two panes that you can view: Announcements and Individuals

**Note: Dropdown for Individuals**

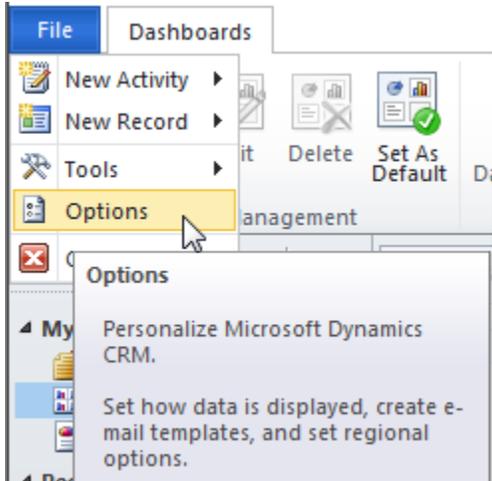
The screenshot shows the CHOICES 2011 dashboard. On the left is a navigation menu with categories like 'My Work', 'People', 'Agencies', and 'Forms'. The main content area is split into two panes. The left pane, titled 'AnnouncementsDashboard', contains a 'Welcome' message and a 'Code Migrations' section. The right pane, titled 'Active Individuals', displays a table of employee records.

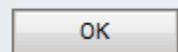
Full Name	TABS ID	Date Of Birth	Medicaid Num...	
ADAMS, JESSICA	120249	11/9/1970		103
ADAMS, NICK	3447	5/6/1931	AM34912J	188
ALBANESE, BILL	3258	2/9/1952	AT76577R	595
ALBANESE, KEVIN	198624	2/4/1966		
ANZALONE, APRIL J	135731	1/7/1963		480
ANZALONE, RICHARD J	5368	6/25/1975	AN53243H	680
APPLE, BILL	127389	4/25/1988	AL17893V	705
APPLE, DAVID	6149	10/31/1970	BU04646S	50
APPLE, DIANA	194686	5/23/1985		
APPLE, KEVIN	190	10/2/1988		188
APPLE, MARY	4784	8/21/1963	AS90065X	4 TI

## Setting your Default Page

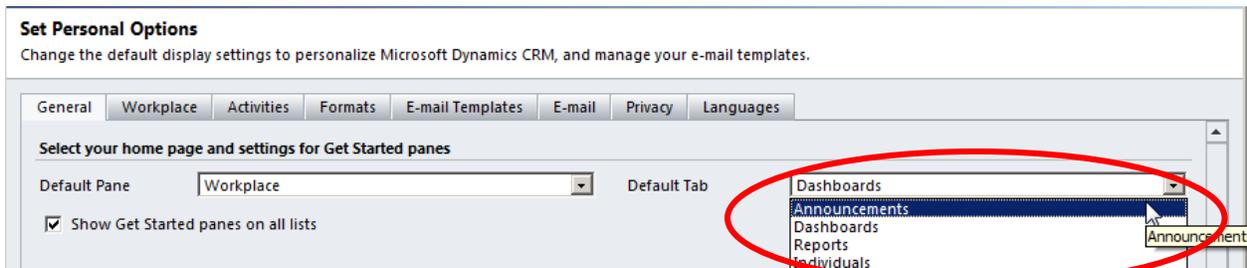
You can choose your default landing page – the page you see as soon as you log into CHOICES 2011.

Click **File**, and from the dropdown select **Options**.



From the **Set Personal Options** screen, **Click** the dropdown arrow for **Default Tab** and change the Dashboards dropdown to what you want to see and click the  button at the bottom of the screen.

We suggest that you change the Default Tab to **Announcements**.



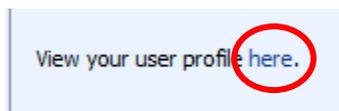
## Displaying User Profile

From the **Set Personal Options** screen, you can also view your User Profile.

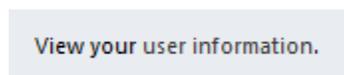
Follow the steps above from the main CHOICES screen by clicking **File** and Selecting **Options**.

In the Previous version of CHOICES you had to click [here](#) at the bottom where it says **View your user profile here**.

**Previous Version**



**Current Version**



**NOTE:** You have to hover over the words user information for the link to appear.

Program Selection pop-up

When selecting a program, there is now a dropdown to choose View.

Program Code	Program Name	Program Type
60680444	TABS Program	RESIDENC CR (SUPPORTIVE)
60680445		RESIDENC CR (SUPPORTIVE)
60680454		RESIDENC CR (SUPPORTIVE)
60680440		RESIDENC CR (SUPERVISED GROU
60680300		SERVICE BLENDED DAY HAB/PRI
60680450		RESIDENC CR (SUPPORTIVE)
60680449		RESIDENC CR (SUPPORTIVE)
60680455		RESIDENC CR (SUPPORTIVE)
60680452	158 MURRAY STREET, C-10	COMMUNITY RESIDENC CR (SUPPORTIVE)
60680453	158-160 MURRAY STREET,...	COMMUNITY RESIDENC CR (SUPPORTIVE)

Location of Search for Records and View dropdown

These sections are now reversed. The View dropdown is on the left and the Search is on the right.

**Previous Version**

Name	Created By	Agency Name	Add TABS Progr...	Remove TABS Pr...	Approved...	Form Status	Purpose	Created On
DDP1 for ABEL, MARIA	train180 train180	HERITAGE FARM, I	77190941 -- HERIT			Saved	Add	1/5/2012
DDP1 for ABEL, MARIA	train183 train183	HERITAGE FARM, I	77190941 -- HERIT			Submitted	Add	1/26/2012
DDP1 for ABEL, MARIA	train179 train179	HERITAGE FARM, I	77190941 -- HERIT			Submitted	Add	1/5/2012
DDP1 for ABEL, MARIA	Train257 Train257	HERITAGE FARM, I				Submitted	Demographic Da...	5/7/2012
DDP1 for ABEL, MARIA	train184 train184	HERITAGE FARM, I	77190901 -- HERIT			Submitted	Add	5/9/2012

**Current Version**

Name	Created By	Agency Name	Add TABS Progr...	Remove TABS Pr...	Approved Effic...	Form Status	Purpose
DDP1 for ADAMS, JESSICA	testCAV006 TestCA	CAYUGA CO. NYS		FSS- IN-HOME RE:		Saved	Remove
DDP1 for ADAMS, JESSICA	testCAV006 TestCA	CAYUGA CO. NYS		FSS- IN-HOME RE:		Submitted	Died

## Filter a column

In addition to being able to sort a column, you can now filter on a column in 2011.

**Example:** You want to find all **Returned DDP1s submitted by me**.

Click the dropdown where it says Active DDP1 and choose **Returned DDP1s submitted by me**.

DDP1 - Registration/Movement Form: Active DDP1	
<input type="checkbox"/>	Name ▲
<input type="checkbox"/>	DDP1 for ADAMS, JESSICA
<input type="checkbox"/>	DDP1 for ADAMS, JESSICA
<input type="checkbox"/>	DDP1 for ADAMS, JESSICA
<input type="checkbox"/>	DDP1 for ADAMS, JESSICA
<input type="checkbox"/>	DDP1 for ADAMS, JESSICA

DDP1 - Registration/Movement Form: Returned DDP1s submitted by me				
<input type="checkbox"/>	Name	TABS ID	Created On	Purpose
<input type="checkbox"/>	DDP1 for BENTON, HARRY	201354	7/6/2012 1:44 PM	Demographic D...

You can also return all of the **Active DDP1s** that contain the name “**BENTON**” Choose **Active DDP1**, then type **Benton** in the Search for Records field. Click the Search Button.

DDP1 - Registration/Movement Form: Search Results		benton							
<input type="checkbox"/>	Name ▲	Created By	Agency Name	Add TABS Progr...	Remove TABS Pr...	Approved Effec...	Form Status	Purpose	
<input type="checkbox"/>	DDP1 for BENTON, HARRY	TestCAV032 TestCA	CA YUGA CO. NYS	76 YORK STREET --	60680444 -- 123 N	7/3/2012	Submitted	Transfer Within ...	
<input type="checkbox"/>	DDP1 for BENTON, HARRY	TestCAV032 TestCA	CA YUGA CO. NYS	182 NORTH STREE			Submitted	Add	
<input type="checkbox"/>	DDP1 for BENTON, HARRY	TestCAV032 TestCA	CA YUGA CO. NYS	182 NORTH STREE			Saved	Add	

## Created On Column

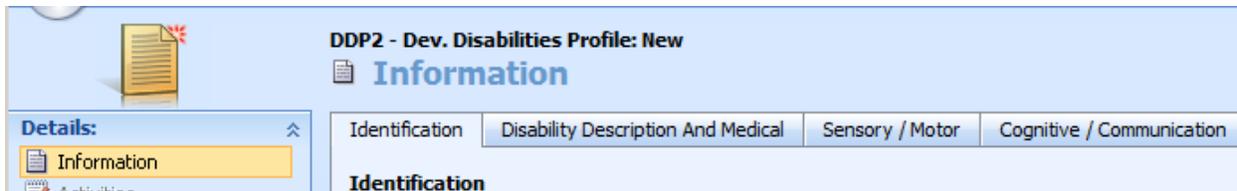
In the updated version of CHOICES the date and time display. In the previous version, only the date displayed

DDP1 - Registration/Movement Form: Active DDP1		Search for records							
<input type="checkbox"/>	JESSICA	Created By	Agency Name	Add TABS Progr...	Remove TABS Pr...	Approved Effec...	Form Status	Purpose	Created On
<input type="checkbox"/>	JESSICA	testCAV006 TestCA	CA YUGA CO. NYS	FSS- IN-HOME RE			Saved	Remove	6/22/2012 10:23 AM
<input type="checkbox"/>	JESSICA	testCAV006 TestCA	CA YUGA CO. NYS	FSS- IN-HOME RE					6/22/2012 10:36 AM
<input type="checkbox"/>	JESSICA	testCAV006 TestCA	CA YUGA CO. NYS	FSS- IN-HOME RE					6/22/2012 10:41 AM

## Form Tabs

Form tabs have been replaced with links on the left, so instead of clicking the tab to enter a specific section of the form, you must click the link on the left of the form.

### Previous Version



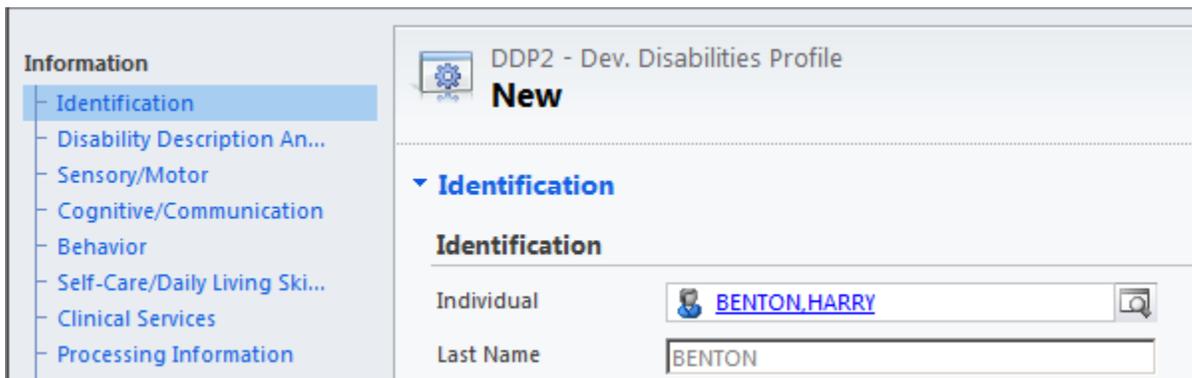
DDP2 - Dev. Disabilities Profile: New  
Information

Details: Information Activities

Identification Disability Description And Medical Sensory / Motor Cognitive / Communication

Identification

### Current Version



Information

- Identification
- Disability Description An...
- Sensory/Motor
- Cognitive/Communication
- Behavior
- Self-Care/Daily Living Ski...
- Clinical Services
- Processing Information

DDP2 - Dev. Disabilities Profile  
New

Identification

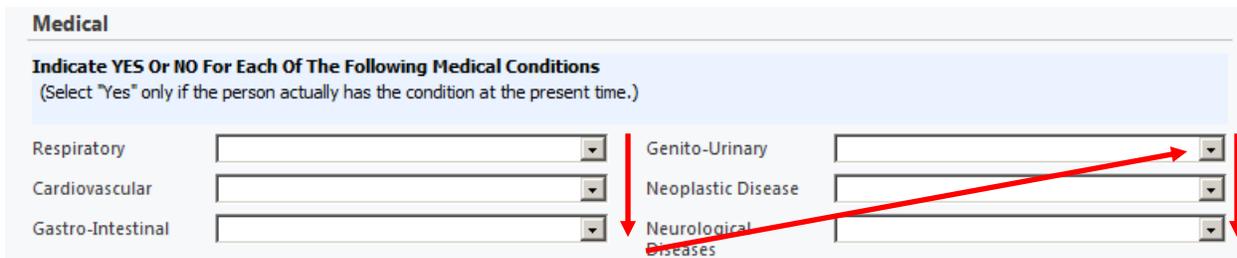
Individual

Last Name

## Tab Key Order

When tabbing through a section of a form, the tabbing order goes down the left-hand side of the form and then to the top of the right hand column and down.

**Example:** With the section below, the tabbing order would go down from Respiratory to Cardiovascular, Gastro-Intestinal and then back up to Genito-U



Medical

Indicate YES Or NO For Each Of The Following Medical Conditions  
(Select "Yes" only if the person actually has the condition at the present time.)

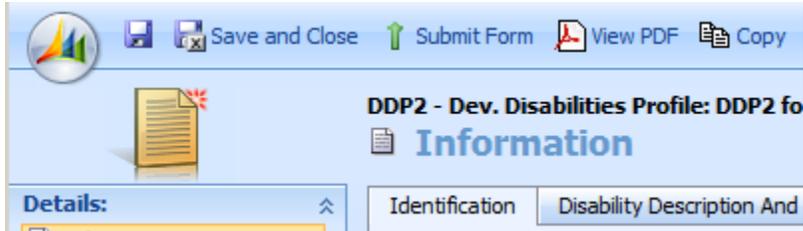
Respiratory	<input type="text"/>	Genito-Urinary	<input type="text"/>
Cardiovascular	<input type="text"/>	Neoplastic Disease	<input type="text"/>
Gastro-Intestinal	<input type="text"/>	Neurological Diseases	<input type="text"/>

Red arrows indicate the tabbing order: down the left column (Respiratory, Cardiovascular, Gastro-Intestinal), across to the top of the right column (Genito-Urinary), and then down the right column (Neoplastic Disease, Neurological Diseases).

## Location of Submit, View PDF and Copy button

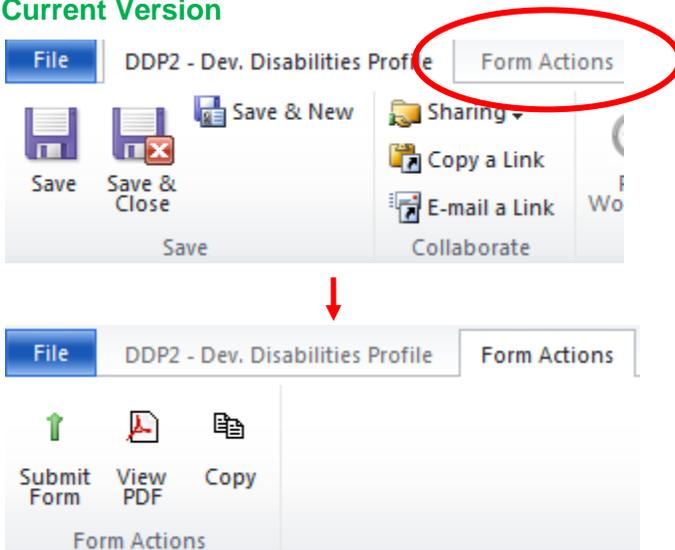
In the Previous version of CHOICES, the Submit, View PDF and Copy buttons were on the main section of the form.

### Previous Version



In the Current version of CHOICES these three buttons display in a different tab labeled **Form Actions**. Click the Form Actions tab to display these buttons.

### Current Version



## DDP2 Dropdowns replaced Radio Buttons

The retired DDP-2 form from the previous version of CHOICES had radio buttons which do not work in the correct manner. A user could choose not to make a selection. This is not how radio buttons are supposed to work. These abnormal radio buttons would not work in the current version of CHOICES, so we had to create a new DDP-2 with dropdowns.

### Previous Version

The screenshot shows the 'Disability Description And Medical' tab of the DDP-2 form. Under the heading 'Disability Description', there is a section for 'Developmental Disabilities (Check All That Apply)'. A link 'Click here to reset the section below' and a 'Reset' button are present. Below this, there are six rows of radio button options:

Developmental Disability?	<input type="radio"/> No	<input checked="" type="radio"/> Yes	Mental Retardation	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Autism	<input type="radio"/> No	<input checked="" type="radio"/> Yes	Cerebral Palsy	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Epilepsy/Seizure Disorder	<input type="radio"/> No	<input checked="" type="radio"/> Yes	Learning Disability (e.g., Dyslexia, Dysgraphia)	<input type="radio"/> No	<input checked="" type="radio"/> Yes

### Current Version

The screenshot shows the 'Disability Description And Medical' tab of the current DDP-2 form. Under the heading 'Disability Description', there is a section for 'Developmental Disabilities (Check All That Apply)'. Below this, there are six rows of dropdown menus:

Developmental Disability?	<input type="text"/>	Epilepsy/Seizure Disorder	<input type="text"/>
Mental Retardation	<input type="text"/>	Learning Disability (e.g., Dyslexia, Dysgraphia)	<input type="text"/>
Autism	<input type="text"/>	Other Neurological Impairment(s)	<input type="text"/>

To make a selection, simply select **Yes** or **No** from the dropdown list.

**NOTE:** After the upgrade, functionality will be added to copy a retired DDP-2 to a new DDP-2 with dropdowns.

## DDP2 in TABS

The DDP-2 in TABS has 2 additional fields:

40. INDIVIDUAL PROVIDING INFO: >

41. INDIVIDUAL PROVIDING INFO PHONE NUMBER: >

Above fields will be populated from CHOICES fields:

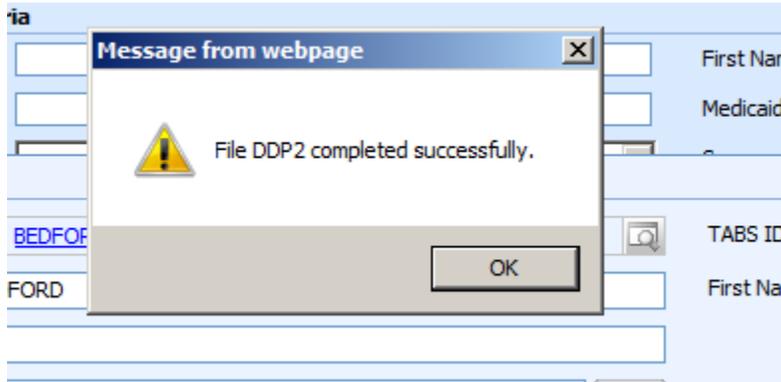
Agency/DDSO Contact Name and Phone Number under the Processing Information link

The screenshot shows the 'Agency/DDSO Contact' section of the form. It has two fields: 'Name \*' with a dropdown menu showing 'TestCAY011 TestCAY011' and a magnifying glass icon, and 'Phone Number' with a text input field containing '555-555-5555'.

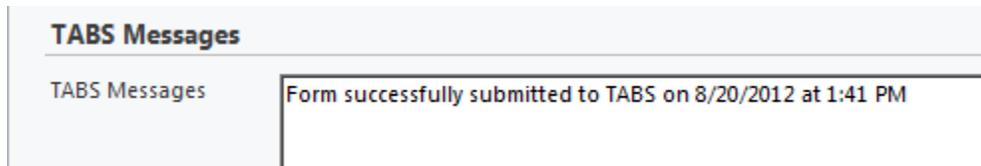
## Alert for DDP and MSC forms that interact with TABS

The way requests were sent to TABS has changed. There are no popup boxes indicating status. Instead, you will need to scroll down on the form to the box title "TABS Messages". There, you will be able to see Success, Error and Warning Messages.

### Previous Version



### Current Version



**Note:** Form will no longer automatically close if TABS processing was successful. The user will have to manually close the form.

## Disabled Text Boxes are harder to distinguish

### Previous Version

Phone Number	<input type="text"/>	Name of Individual or Family Member	<input type="text"/>
Individual or Family Member *	<input type="text"/>	Individual or Family Member's Electronic Signature	<input type="text"/>

### Current Version

Phone Number	<input type="text"/>	Name of Individual or Family Member	<input type="text"/>
Individual or Family Member *	<input type="text"/>	Individual or Family Member's Electronic Signature	<input type="text"/>

## [DDP4 Removed confusing text](#)

Removed “Choose all that apply” from read-only sections in DDP4

### Previous Version

The screenshot shows the 'DDP4 - Conf. Needs Identification: New' form. The 'Disabilities And Other Demographic' tab is selected. Under the 'Disabilities' section, the heading is 'Disabilities (Choose All That Apply)', which is circled in red. Below this heading are six rows of radio button options for 'Developmental Delay', 'Autism', 'Epilepsy/Seizure Disorder', 'Mental Retardation', 'Cerebral Palsy', and 'Learning Disability', each with 'No' and 'Yes' options.

### Current Version

The screenshot shows the current 'DDP4 - Conf. Needs Identification' form. The 'Disabilities And Other Demographic' section is expanded. The 'Disabilities' heading is clear, and the radio button options for 'Developmental Delay', 'Autism', 'Epilepsy/Seizure Disorder', 'Mental Retardation', 'Cerebral Palsy', and 'Learning Disability' are presented in a clean, organized manner without the previous confusing text.

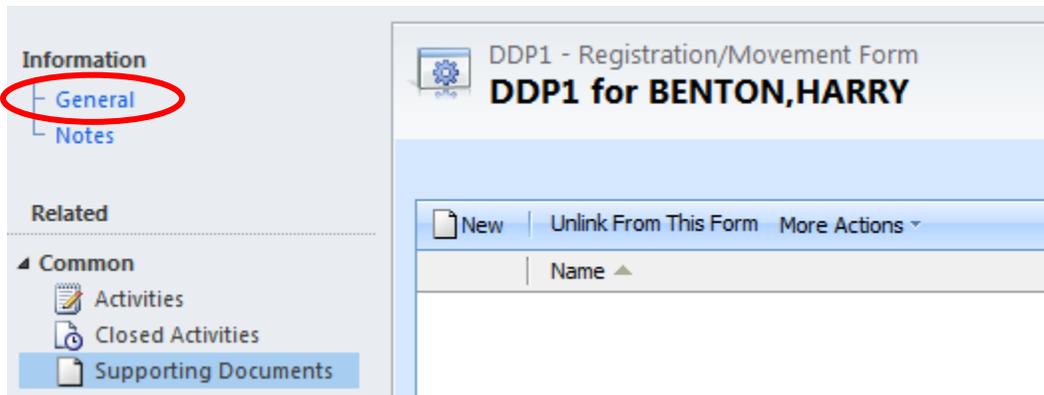
## [Return to Form from Supporting Documents screen](#)

You need to click one of the links under Information, on the left to return to the form from the Supporting Documents list screen.

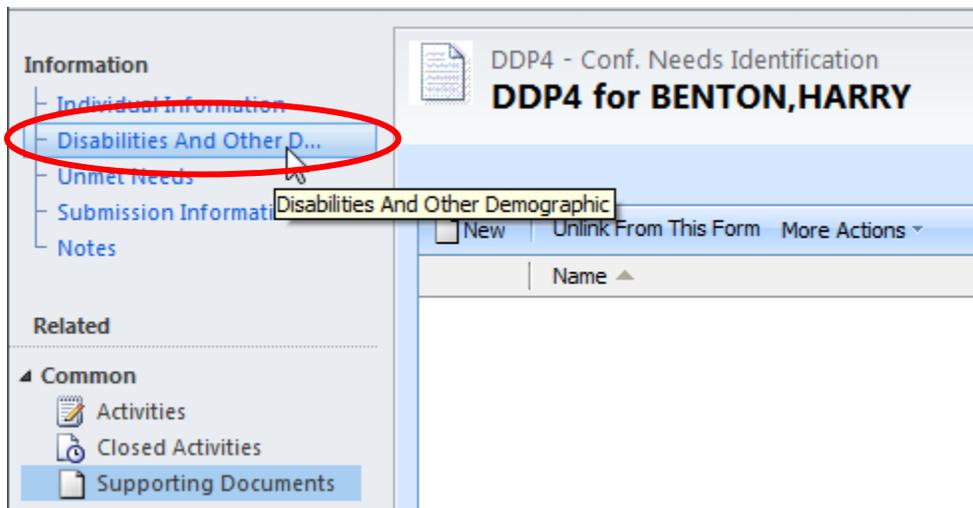
### Previous Version

The screenshot shows a 'Details' sidebar on the left with a menu containing 'Information', 'Activities', 'History', and 'Supporting Documents'. The 'Information' item is circled in red. To the right, there is a list of supporting documents with a 'New' button, 'Unlink From This Form' link, and 'More Actions' dropdown. A document named 'k.docx' is listed.

## Current Version



Or



## Inactive MSC1 list changed

Added more columns to Inactive MSC-1 list (matches fields in Active MSC-1 list)

## Previous Version (Active View)

MSC1-APPL-Application For MSC							
Search for records							View: Active MSC1
	Name	Individual	TABS Program C...	Vendor/DDSO N...	Application Decis...	Form Status	Created On
▶	MSC1 for ABEL,MARIA	ABEL,MARIA	77190590 --HERIT	HERITAGE FARM,I		Submitted	6/8/2011
▶	MSC1 for ABEL,MARIA	ABEL,MARIA	77190590 --HERIT	HERITAGE FARM,I		Saved	6/20/2012
▶	MSC1 for ABEL,MARIA	ABEL,MARIA	77190590 --HERIT	HERITAGE FARM,I		Submitted	9/15/2011

## Previous Version (Inactive View)

MSC1-APPL-Application For MSC			
Search for records			View: Inactive MSC1
New [Export] [Refresh] More Actions			
<input type="checkbox"/>	Name	Created On	Form Status
<input type="checkbox"/>	MSC1 for ABEL, MARIA	5/24/2011	Approved
<input type="checkbox"/>	MSC1 for ABITTAN, HALI	5/11/2011	Approved
<input type="checkbox"/>	MSC1 for ADAMS, JACOB	5/20/2011	Approved

## Current Version (Active View)

MSC1-APPL-Application For MSC: Active MSC1							
Search for records							
<input type="checkbox"/>	Name	Individual	TABS Program C...	Vendor/DDS...	Application Dec...	Form Status	Created On
<input type="checkbox"/>	MSC1 for DAY, LILY	DAY, LILY	CAYUGA CO NYSA	CAYUGA CO. NYSA	Request for MS...	Submitted	6/25/2012 11:49...
<input type="checkbox"/>	MSC1 for FLOWER, SUNNY		CAYUGA CO NYSA	CAYUGA CO. NYSA		Submitted	6/25/2012 11:53...

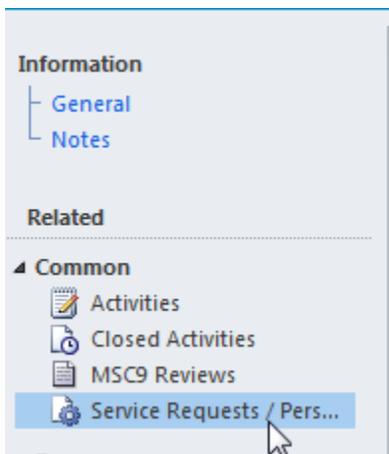
## Current Version (Inactive View)

MSC1-APPL-Application For MSC: Inactive MSC1							
Search for records							
<input type="checkbox"/>	Name	TABS ID	TABS Program Code	Vendor/DDS...	Application Dec...	Form Status	Created On
<input type="checkbox"/>	MSC1 for BEGONIA, RED	201322	CAYUGA CO NYSARC MSC PI	CAYUGA CO. NYSA	Request for MS...	Approved	6/25/2012 11:51 AM
<input type="checkbox"/>	MSC1 for CAREY, KRISTAL	200770	CAYUGA CO NYSARC MSC PI	CAYUGA CO. NYSA	Request for MS...	Approved	6/26/2012 1:55 PM
<input type="checkbox"/>	MSC1 for CARNATION, PINKIE	201320	CAYUGA CO NYSARC MSC PI	CAYUGA CO. NYSA		Returned	6/26/2012 1:20 PM

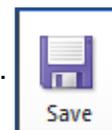
## [MSC-9 Adding Activities to Service Request / Personal Goal](#)

You need to do 3 things to add an activity to the service request / personal goal.

### Current Version



1. With the Service Request/Personal goal form open, Click **Save**.



Service Request / Personal Goal Service Requests ...

**New**

▼ **General**

MSC9 \*

Service Request / Personal Goal \*

**Activities**

**You must save this form before you can add any MSC9 Activities.**

<input type="checkbox"/>	Activity Description	Form Status	Created On
--------------------------	----------------------	-------------	------------

- Click the rectangle under Activities.

**Activities**

**Click on the box below to see the Add New MSC9 Activity Button in the top left corner.**

<input type="checkbox"/>	Activity Description ▲	Form Status	Created On
No MSC9 Activity records are available in this view.			

0 - 0 of 0 (0 selected) Page 1

- Click the "Add New MSC Activity button" in the top-left corner of the ribbon.

File	Service Request / Personal Goal	MSC9 Activities
<p>Add New MSC9 Activity</p>	<p>Delete MSC9 Activity</p>	<p>Share</p> <p>Copy a Link</p> <p>E-mail a Link</p>
Records		Collaborate

4. Fill out the form for MSC Activity and then **Save**.

MSC9 Activity  
New

MSC9 Activities

**General**

**Activity To Complete**

Activity Description \* This is an activity that will help with goals

Service Request Personal Goal This is the Service Request Personal Goal

Will MSC Complete Task Yes Will Individual Complete Task No

Will Family Member Complete Task Yes

Will Others Complete the Task No Specify Others

Start Date 8/20/2012

Is Task Complete Completion Date

The activity now shows up in the list for the MSC9

**Activities**

Click on the box below to see the Add New MSC9 Activity Button in the top left corner.

Activity Description	Form Status	Created On
This is an activity that will help with goals	Saved	8/20/2012 3:53 PM

1 - 1 of 1 (0 selected) Page 1

## [MSC-10 and MCS-10B](#)

MSC-10 has been retired. MSC-10B with only one signature is to be used instead.

### Previous Version

In the previous version the user would sign each section of the MSC-10 along with signing the Monthly Notes, before Submission of the form.

### Current Version

In the current version of CHOICES the user only has to sign the form at the final submission of the form.

**NOTE:** You can now print the MSC-10B after it is saved and before it is signed.

## ISP Add Service buttons

After you click in the box for each service, the Add service button will appear in the ribbon at the top-left corner.

### Previous Version

**Medicaid State Plan Services**

Complete a section below for each Medicaid State Plan service including service state the **name** of the provider or agency (e.g., Dr. Smith, # day treatment, MSC, transportation, durable medical equipment, etc. whether the clinic is an Article 16, 28, or 31 (e.g. UCP Article 28 Clinic Occupational Therapy, Speech Therapy, etc.).

### Current Version

**Click on the box below to see the Add Service Button in the top left corner.**

Name of Provider ▲	Type of Service
No ISP Medicaid State Plan Service records are a	

0 - 0 of 0 (0 selected)



**File** | ISP-Individualized Service Plan

**Medicaid State Plan Services**

ISP

Name of Provider

Additional Information (optional)

## ISP – Services Additional Information keeps formatting in PDF

The **Additional Information** box, which usually contains provider address, now keeps it formatting in the PDF.

### Previous Version

<b>Name of Provider:</b>	XYZ Provider		
<b>Type of Service:</b>	Day Hab		
<b>Additional Information:</b>	555 Schenectady, NY 12345	Apple	Blvd.

### Current Version

<b>Name of Provider:</b>	ABC Provider
<b>Type of Service:</b>	Res Hab
<b>Additional Information:</b>	1010 Cherry St. Schenectady, NY 12345

## ISP – Other or 100% funded has a link instead of listing the Services

This is built in CRM functionality that happens for sub-grids after the forth one on the page. It saves on the time it takes a page to load. Users must click on this link to display previously entered services. This is out-of-the-box functionality that cannot be changed.

### Previous Version

**Other or 100% OPWDD funded**

Complete a section below for each service. Add more sections as needed. UCP, Southern DDSO); and the **type** of service.

### Current Version

**Other or 100% OPWDD funded**

Complete a section below for each service. Add more sections as needed. For each service briefly state the **name** of the provider or agency (e.g., Sunshine Co. UCP, Southern DDSO) and the **type** of service.

**Click on the box below to see the Add Service Button in the top left corner.**

<input type="checkbox"/>	Name of Provider ▲	Type of Service	Additional Information	
<a href="#">To load ISP Other Service Funded By OPWDD records, click here.</a>				

0 - 0 of 0 (0 selected) Page 1

## [LCED Date of Waiver Enrollment before date Physician signed](#)

If **Is this initial LCED in CHOICES?** is **Yes**, then the form allows the **Date of Waiver Enrollment** to be before the **Date Physician Signed**, an alert is displayed for the DDSO Director/Designee to make them aware

### Current Version

Physician Signature	
Has Physician Signed Paper Form *	<input checked="" type="checkbox"/>
Name of Physician *	<input type="text" value="Phil Smith"/>
Date Physician Signed *	<input type="text" value="8/29/2012"/>
DDSO Approvals	
Has the OPWDD process for DD Eligibility been completed by the DDSO? *	<input type="text" value="Yes"/>
ICF/MR Level of Care Decision *	<input type="text" value="ICF/MR Level of Care Approved"/>
ICF/MR Level of Care Approved Effective *	<input type="text" value="8/27/2012"/>
Date of Waiver Enrollment *	<input type="text" value="8/27/2012"/>

Qualified Reviewer	
Qualified Reviewer Signing this Form *	<input type="text" value=""/>
Title of Qualified Reviewer *	<input type="text" value=""/>
Physician Signature	
Has Physician Signed Paper Form *	<input type="checkbox"/>
Name of Physician *	<input type="text" value="Dr. John Smith"/>

Message from webpage

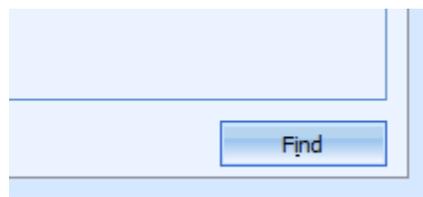
 Warning: Date of waiver enrollment is before the physician's signature date.

OK

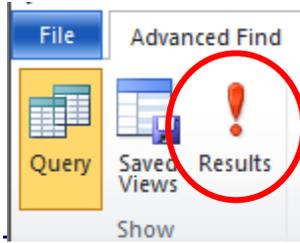
## [Advanced Find](#)

There is no longer a **Find** button to run an Advanced Find query. You have to click **Results!** to run a query in 2011. After getting the results, you have to click on the **Advanced Find** tab to return to the query.

### Previous Version



## Current Version



**NOTE:** After getting the results, you have to click on the **Advanced Find** tab to return to the query.

## Queues

### [Assign](#)

Due to problems with using the assign feature, this functionality will be turned off in CRM 2011.

## Previous Version

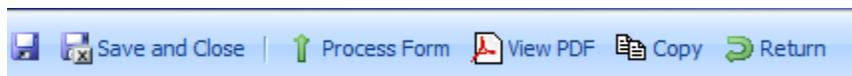


### [DDP1 Register Button](#)

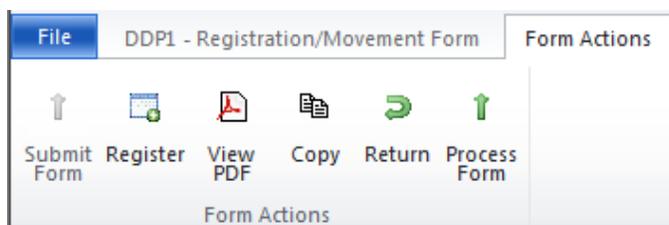
The Register button will always be enabled if the user's role has register capability.

## Previous Version

Register button would not display if person was already registered.



## Current Version



**NOTE:** No harm is caused by a user trying to register someone who is already registered in TABS.

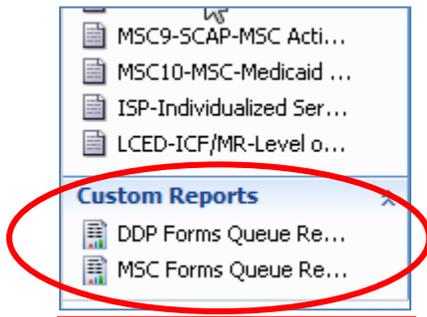
TABS Messages

Notification on 8/31/2012 at 2:13 PM  
Initiated by: TestCNY62 TestCNY62  
Message:  
Individual is already registered in the specified DDSO.

## MSC and DDP Queue Report Links

These are now located under **My Work > Reports**.

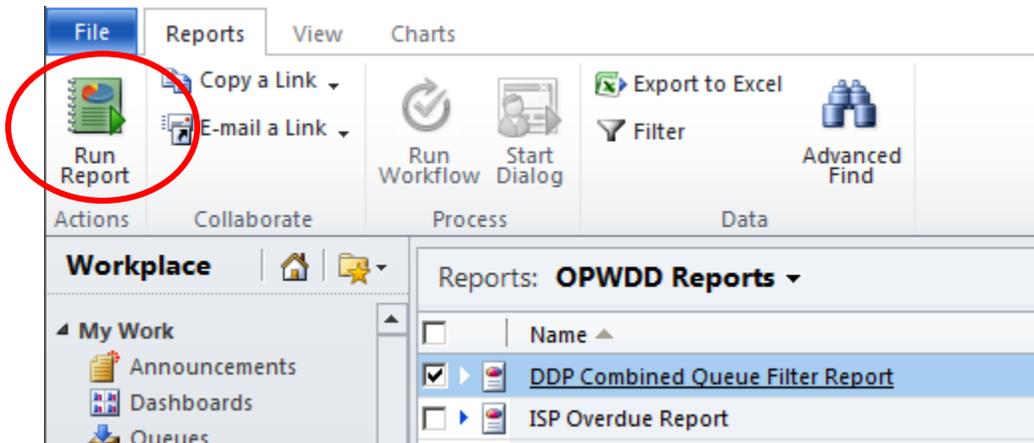
### Previous Version



### Current Version



Check the box of a report and click **Run Report** button.



## Reports

### [ISP Report](#)

Lists Individuals whose most recent completed ISP is dated more than 6 months ago. All CHOICES users can run this report, but if you do not have access to ISP you will not see any results.

Select Checkbox for **ISP Overdue Report**.

Click **Run Report**

Reports: **OPWDD Reports** Search

<input type="checkbox"/>	Name ▲	Description
<input type="checkbox"/>	DDP Combined Queue Filter Report	Details on DDP Forms waiting to be processed
<input checked="" type="checkbox"/>	<b>ISP Overdue Report</b>	Report of ISPs that are over 6 months old (ISP age is de...
<input type="checkbox"/>	MSC Combined Queue Filter Report	Details on MSC forms waiting to be processed
<input type="checkbox"/>	User Summary	View user contact and security role information.



Agency	SYRACUSE DEVELOPMENTAL CENTER	County of Residence	BROOME, LEWIS, ONEIDA, ONONDAGA	<input type="button" value="View Report"/>
Last ISP (or Review) Not Before	<input type="text"/>	<input checked="" type="checkbox"/>	NULL	

1 of 1 | 100% | Find | Next

### ISP Overdue Report

*(Individual's whose most recent completed ISP is over 6 months old)*

Most Recent ISP	TABS ID	Agency	ISP Type	ISP Date	Review Date	Service Coordinator
ISP for JOHNSON,LISA D	50553	SYRACUSE DEVELOPMENTAL CENTER (DC)	New/Initial	9/20/2011		Rick Gross
ISP for SIPPERLY,KEVIN	57731	SYRACUSE DEVELOPMENTAL CENTER (DC)	Review/Addendum	1/5/2010	7/5/2010	Alison DeSieno
ISP for SMITH,ANNA N	201289	SYRACUSE DEVELOPMENTAL CENTER (DC)	New/Initial	1/1/2012		TestCNY42 TestCNY42
ISP for TURNER,WILLIAM	46533	SYRACUSE DEVELOPMENTAL CENTER (DC)	Review/Addendum	1/1/2011	4/14/2011	Alison DeSieno

Total Rows: 4

## User Summary Report

The upgrade comes with an out-of-box User Summary Report which will be used instead of the custom report in the Previous Version of CHOICES. All users can run this report to display CHOICES users and their roles within their DDSO or Agency.

Select Checkbox for **User Summary**.

Click **Run Report**

Reports: <b>OPWDD Reports</b> ▾		Search for records	
<input type="checkbox"/>	Name ▲	Description	
<input type="checkbox"/>	DDP Combined Queue Filter Report	Details on DDP Forms waiting to be processed	
<input type="checkbox"/>	ISP Overdue Report	Report of ISPs that are over 6 months old (ISP age is de...	
<input type="checkbox"/>	MSC Combined Queue Filter Report	Details on MSC forms waiting to be processed	
<input type="checkbox"/>	Portal User Report	Individuals associated with my agency and their Portal ...	
<input checked="" type="checkbox"/>	<b>User Summary</b>	View user contact and security role information.	



File

Edit Filter

1 of 5 100% Find | Next

### User Summary

Business Unit: 60680 -- CAYUGA CO.  
NYSARC, INC.

User	Title	E-mail	Main Phone	No Role
Alison DeSienoTest2			518-987-6543	-

## Portal User Report

The Portal User Report displays Individuals that are enrolled in programs in your agency and their associated Portal Users. Access to this report is granted by Jim Hacknauer.

Select Checkbox for **Portal User Report**.

Click **Run Report**

Reports: <b>OPWDD Reports</b> ▾		Search f
<input type="checkbox"/>	Name ▲	Description
<input type="checkbox"/>	DDP Combined Queue Filter Report	Details on DDP Forms waiting to be processed
<input type="checkbox"/>	ISP Overdue Report	Report of ISPs that are over 6 months old (ISP age is de...
<input type="checkbox"/>	MSC Combined Queue Filter Report	Details on MSC forms waiting to be processed
<input checked="" type="checkbox"/>	<u>Portal User Report</u>	Individuals associated with my agency and their Portal ...
<input type="checkbox"/>	User Summary	View user contact and security role information.



<b>Individual-Portal User Report</b>						
Full Name	Full Name	E-mail	Business Phone	Home Phone	Created By	Created On