

EAA – Eligibility, Assessment and Authorization Tool - Approval

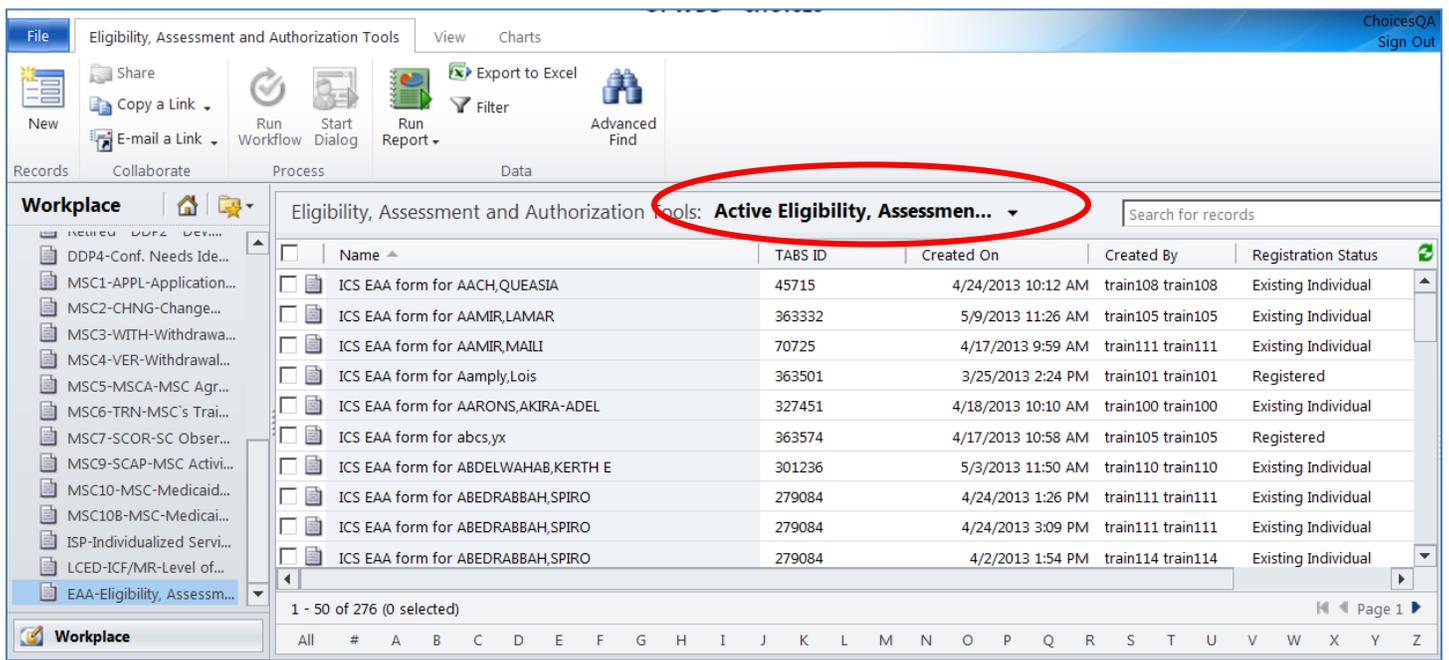
The Eligibility, Assessment and Authorization Tool (EAA), is a form used to guide Regional Office (RO) Staff through the processes associated with OPWDD's Front Door. The EAA Tool records vital information as it is obtained from "new" people seeking supports and/or services through OPWDD. This tool will also be utilized for people already receiving services that express a desire for a new service or a change in existing services.

The approval process can be done by someone that has the EAA Approval role in CHOICES.

NOTE: For help and Step-by-Step instructions for logging into CHOICES please check the **Navigation Step-by-Step** documentation on the CHOICES Training page.

EAA form that is awaiting approval

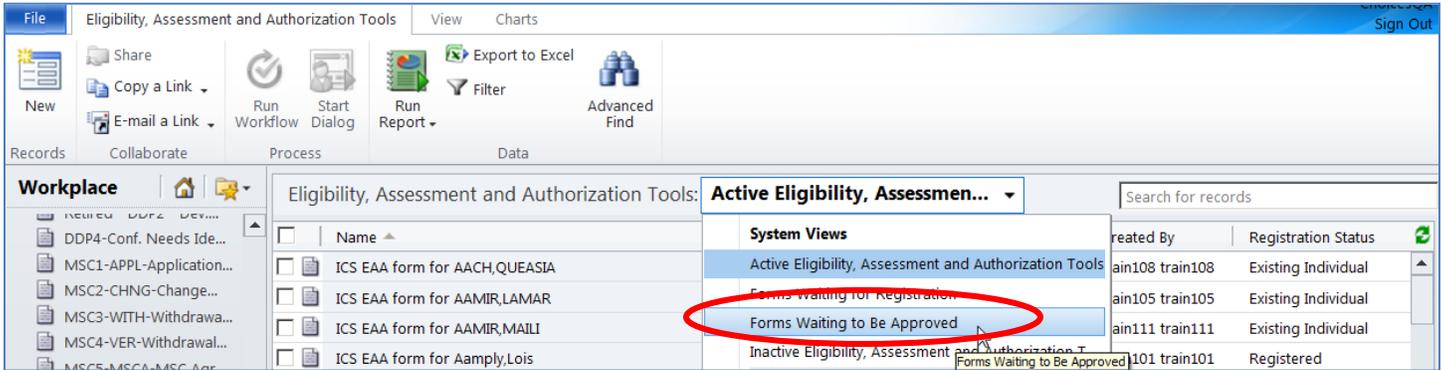
Click on the *EAA* section from the main CHOICES page and click the Active Eligibility, Assessment and Authorization dropdown .



The screenshot displays the CHOICES software interface. The top navigation bar includes 'File', 'Eligibility, Assessment and Authorization Tools', 'View', and 'Charts'. The 'Tools' dropdown menu is open, and 'Active Eligibility, Assessment and Authorization' is selected and circled in red. Below the dropdown is a table of EAA forms with columns for Name, TABS ID, Created On, Created By, and Registration Status.

Name	TABS ID	Created On	Created By	Registration Status
ICS EAA form for AACH,QUEASIA	45715	4/24/2013 10:12 AM	train108 train108	Existing Individual
ICS EAA form for AAMIR,LAMAR	363332	5/9/2013 11:26 AM	train105 train105	Existing Individual
ICS EAA form for AAMIR,MAILI	70725	4/17/2013 9:59 AM	train111 train111	Existing Individual
ICS EAA form for Aamply,Lois	363501	3/25/2013 2:24 PM	train101 train101	Registered
ICS EAA form for AARONS,AKIRA-ADEL	327451	4/18/2013 10:10 AM	train100 train100	Existing Individual
ICS EAA form for abcs,yx	363574	4/17/2013 10:58 AM	train105 train105	Registered
ICS EAA form for ABDELWAHAB,KERTH E	301236	5/3/2013 11:50 AM	train110 train110	Existing Individual
ICS EAA form for ABEDRABBAH,SPIRO	279084	4/24/2013 1:26 PM	train111 train111	Existing Individual
ICS EAA form for ABEDRABBAH,SPIRO	279084	4/24/2013 3:09 PM	train111 train111	Existing Individual
ICS EAA form for ABEDRABBAH,SPIRO	279084	4/2/2013 1:54 PM	train114 train114	Existing Individual

From the dropdown click **Forms Waiting to be Approved**.



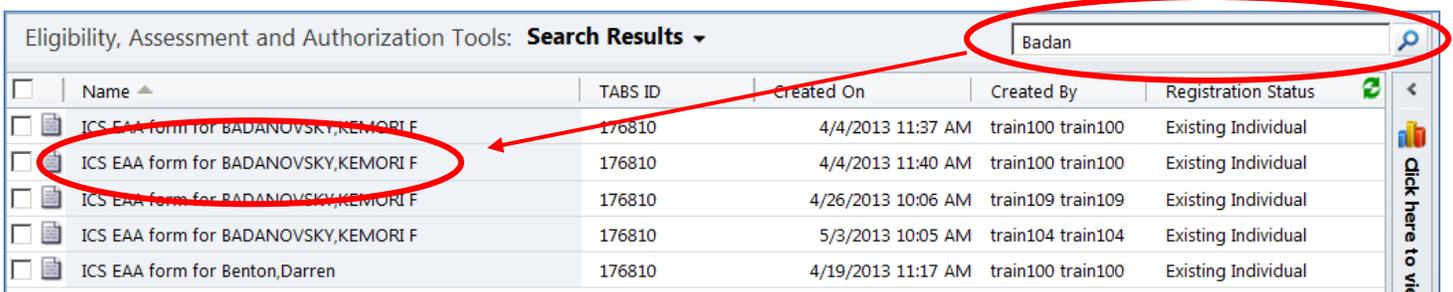
This will bring you into the View that shows all EAA forms waiting to be approved. This screen displays the Individual's name and TABS ID along with the date the form was created, who created the form and who submitted the form.

NOTE: You can sort any of the columns by the column heading by clicking the column heading. For example, if I wanted to sort by the person that submitted the form, I would just click the **Submitted by** column heading.

Created On	Created By	Submitted By
3/25/2013 2:24 PM	train101 train101	train102 train102
4/17/2013 10:58 ...	train105 train105	train105 train105
4/24/2013 1:26 PM	train111 train111	train111 train111

For this example we will search for the Individual that the form was submitted for. Search for the Individual by typing the last name in the search box and click the *Find* icon: 

Click on the EAA form for the Individual that you wish to Authorize the EAA form for, to open the Individual's EAA form.



NOTE: Allow all records or forms to fully open before trying to maximize or clicking within to begin work.

The **EAA** for the Individual displays.

Eligibility, Assessment and Authorization Tool

ICS EAA form for BADANOVSKY, KEMORI F

Individual's Information

Individual	BADANOVSKY, KEMORI F	Address Line 1	9557 WEBSTR PENRITH
Last Name *	BADANOVSKY	Address Line 2	
First Name *	KEMORI	City	DEPOSIT
Middle Initial	F	State	NEW YORK
TABS ID	176810	Zip Code	11772-2330
Date Of Birth *	2/14/1990	County of Residence *	DELAWARE
Sex *	Male	Phone Number	555-951-1776
Primary Language (if not English)		Residence Type	
Medicaid Number	DY76810S	Living Arrangement	
		E-mail Address	
		Marital Status	Never Married

Scroll down the form using the scrollbar on the right, or you can click the blue links in the left column to go to that section (E.g. [Discussed and Authorized Supports and Services](#) or [DDRO Director/Designee Signoff](#), etc..)

Check the form to make sure that everything meets with your approval.

NOTE: Some fields need to be filled out by you. Required fields have Red asterisks *

Discussed and Authorized Supports

The Discussed and Authorized Supports section is a sub-form on the EAA form. This captures the Category and Type of service that was discussed and if the service was discussed and authorized. As the Approver it may be your job to go into the sub-form and Authorize the service.

NOTE:

The sections **Priority Factors for Consideration**, **Non-OPWDD Supports and Services Currently in Place**, **Current OPWDD Supports and Services in Place** and **Discussed and Authorized Supports and Services** all use the Sub-form Process. You may need to access each sub-form to determine authorization of the form. The **Discussed and Authorized Supports** sub-form requires your action, so we will focus on that for this training document.

Discussed and Authorized Supports and Services

<input type="checkbox"/>	Category of Service ▲	Type of Service	Specify	Discussed?	Recommended? 
<input checked="" type="checkbox"/>	Community, Relationships, Meaningful ...	Live-in Caregiver - Self-Directed		Yes	Yes
<input type="checkbox"/>	Coordination and Brokerage	Support Brokerage		Yes	Yes
<input type="checkbox"/>	Health and Environmental Supports	Environmental Modifications (Home Ac...		Yes	Yes

1 - 3 of 3 (1 selected) Page 1

To view more information on a particular service, click the **Category of Service** link for that category. In this case we double-click the link **Community, Relationships, Meaningful...**

Discussed and Authorized Supports and Services

<input type="checkbox"/>	Category of Service ▲	Type of Service	Specify	Discussed?	Recommended? 
<input checked="" type="checkbox"/>	Community, Relationships, Meaningful ...	Live-in Caregiver - Self-Directed		Yes	Yes
<input type="checkbox"/>	Coordination and Brokerage	Support Brokerage		Yes	Yes
<input type="checkbox"/>	Health and Environmental Supports	Environmental Modifications (Home Ac...		Yes	Yes

1 - 3 of 3 (1 selected) Page 1

The **Discussed and Authorized Supports and Services** sub-form appears.

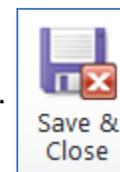
It is up to you as the Authorizer of the form to choose whether the Service was Authorized or not.

Click the button with the dropdown arrow to the right of the **Was this service authorized?** Field.

From the dropdown list you can choose **Yes** or **No**.

NOTE: If you choose **No**, **Reason not authorized** becomes a required field and you must choose one of the options from that list.

Once you have completed the sub-form, click the **Save and Close** button.



Do the same steps for all of the **Discussed and Authorized Supports and Services** listed on the EAA form.

▼ **Discussed and Authorized Supports and Services**

<input type="checkbox"/>	Category of Service ▲	Type of Service	Specify	Discussed?	Recommended? 
<input checked="" type="checkbox"/>	Community, Relationships, Meaningful ...	Live-in Caregiver - Self-Directed		Yes	Yes
<input type="checkbox"/>	Coordination and Brokerage	Support Brokerage		Yes	Yes
<input type="checkbox"/>	Health and Environmental Supports	Environmental Modifications (Home Ac...		Yes	Yes

1 - 3 of 3 (1 selected) Page 1



DDRO Director/Designee Signoff

▼ **DDRO Director/Designee Signoff**

DDRO Director/Designee: Title:

Phone Number: Date of Decision: 

Use the Date Picker button to choose a **Date of Decision**. Click the button calendar on it to the right of the **Date of Decision** field. You can use the arrows to the left and right of the Month and Year to change the Month and then click the day from the Calendar. In this case we clicked May 24.

Date of Decision 

◀ May, 2013 ▶

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: 5/24/2013

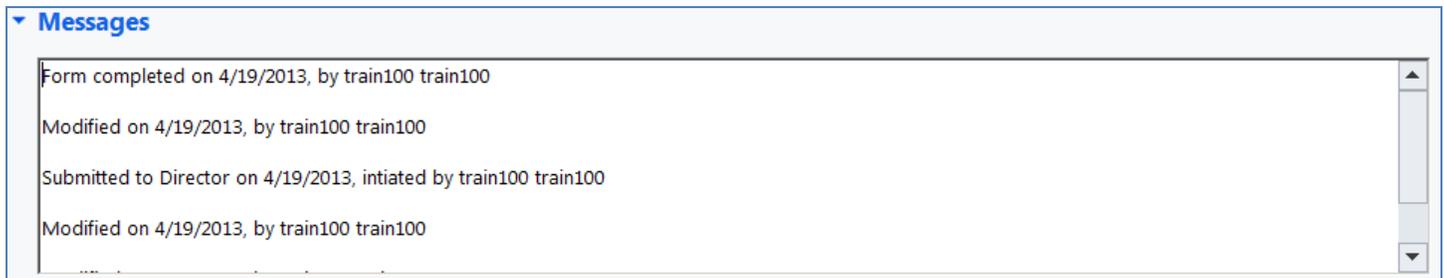
This updates the field to display:

Date of Decision 

Messages

The Messages section of the form will update every time the form is saved, submitted and processed. This tracks anytime a user makes a change to the form.

This is an example of the Messages in an EAA form that has been Submitted and Processed by the DDRO Director/Designee. Instead of train100 you would see the user's actual name. You can see it was Submitted to the Director and then the Form was completed (Final Authorization by DDRO Director/Designee).



A screenshot of the 'Messages' section in an EAA form. The section is titled 'Messages' with a dropdown arrow. Below the title, there is a list of four messages:

- Form completed on 4/19/2013, by train100 train100
- Modified on 4/19/2013, by train100 train100
- Submitted to Director on 4/19/2013, initiated by train100 train100
- Modified on 4/19/2013, by train100 train100

Notes

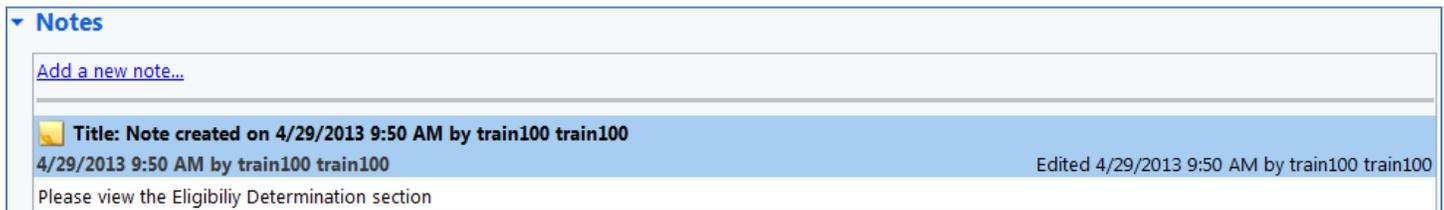
A user can make a Note at any time on the EAA form. If the Director/Designee **Returns** the EAA form to the Submitter, they are forced to make a Note to let the user know what is required.

Click the Notes header to open the Notes section.



A screenshot of the 'Notes' section in an EAA form. The section is titled 'Notes' with a dropdown arrow. Below the title, there is a link labeled 'Add a new note...' which is circled in red.

To add a new note, click the **Add a new note** link. A field will open where you can type your note.



A screenshot of the 'Notes' section in an EAA form. The section is titled 'Notes' with a dropdown arrow. Below the title, there is a link labeled 'Add a new note...'. Below the link, there is a note card with the following information:

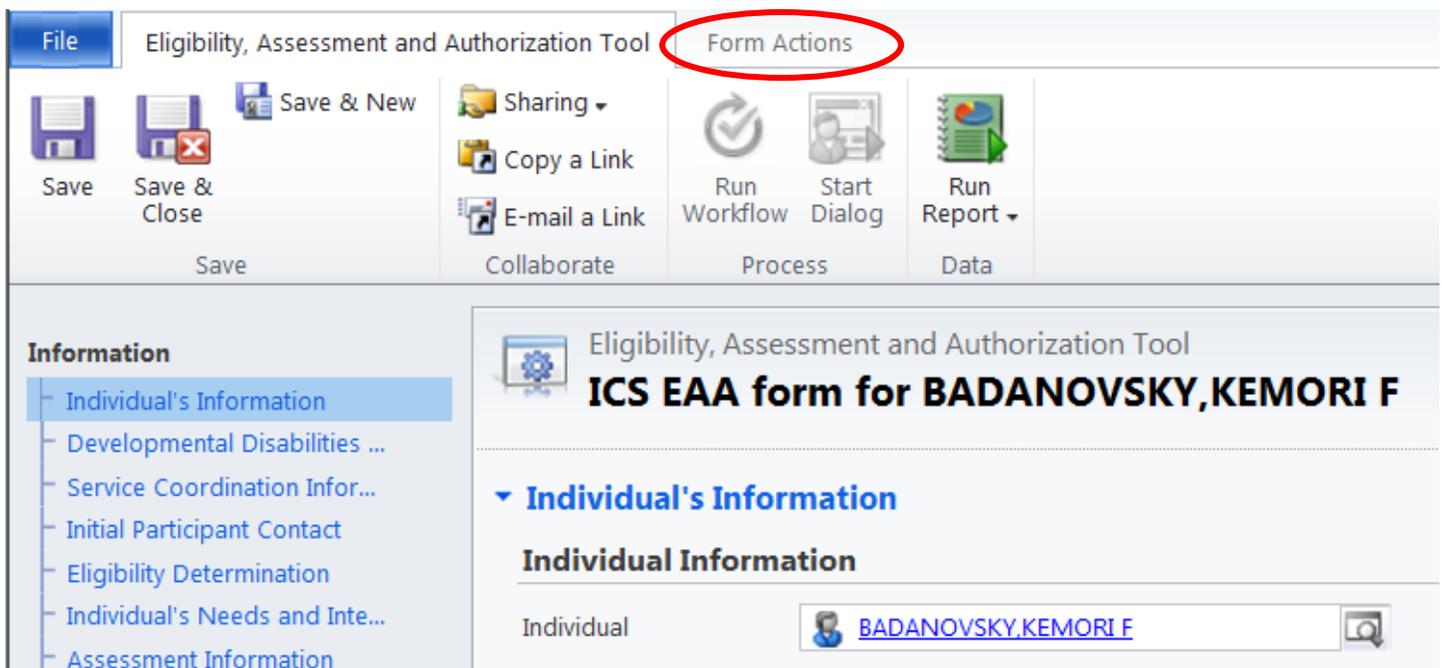
- Title: Note created on 4/29/2013 9:50 AM by train100 train100
- 4/29/2013 9:50 AM by train100 train100
- Edited 4/29/2013 9:50 AM by train100 train100
- Please view the Eligibility Determination section

NOTE: When you have finished typing the Note click outside the field you are typing inside to save the Note.

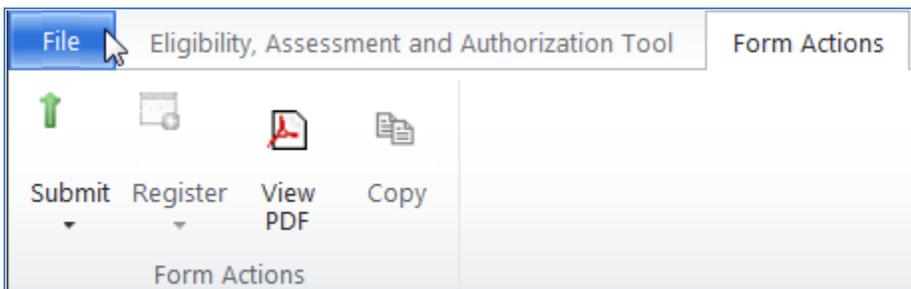
Complete Authorization of the EAA Form

Once you have finished viewing the EAA form you are ready to **Complete the Form Authorization**.

Click, **Form Actions**



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



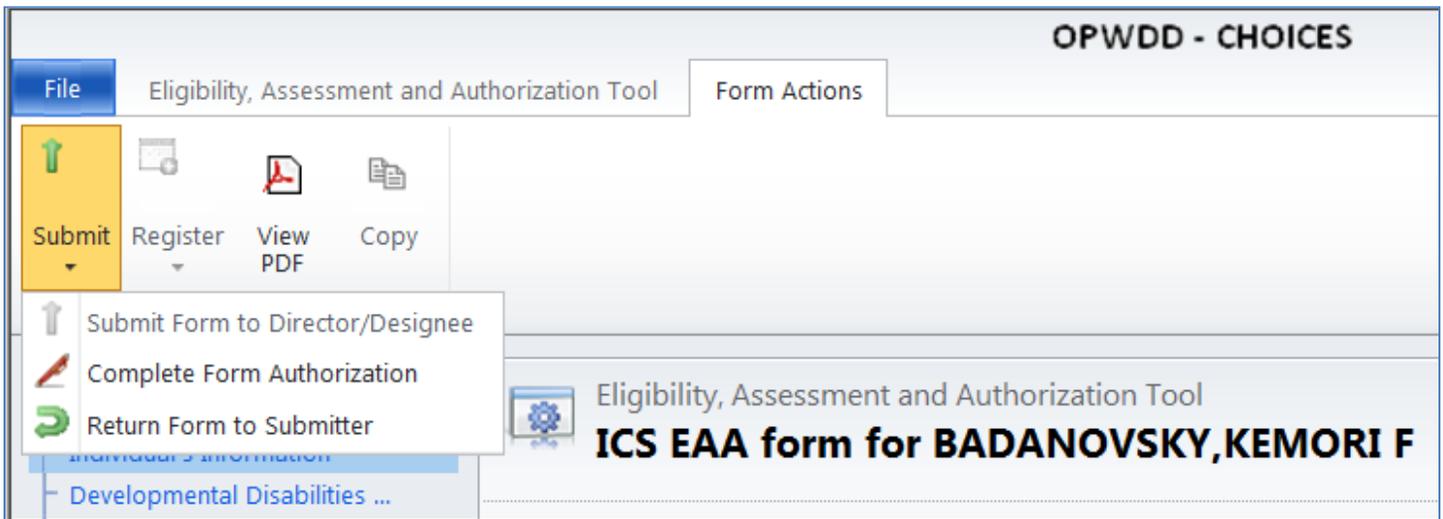
Submit, will allow the Director/Designee to Complete the Form Authorization or Return the Form to the person that submitted the form.

View PDF, will display a PDF version of the form.

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”.)

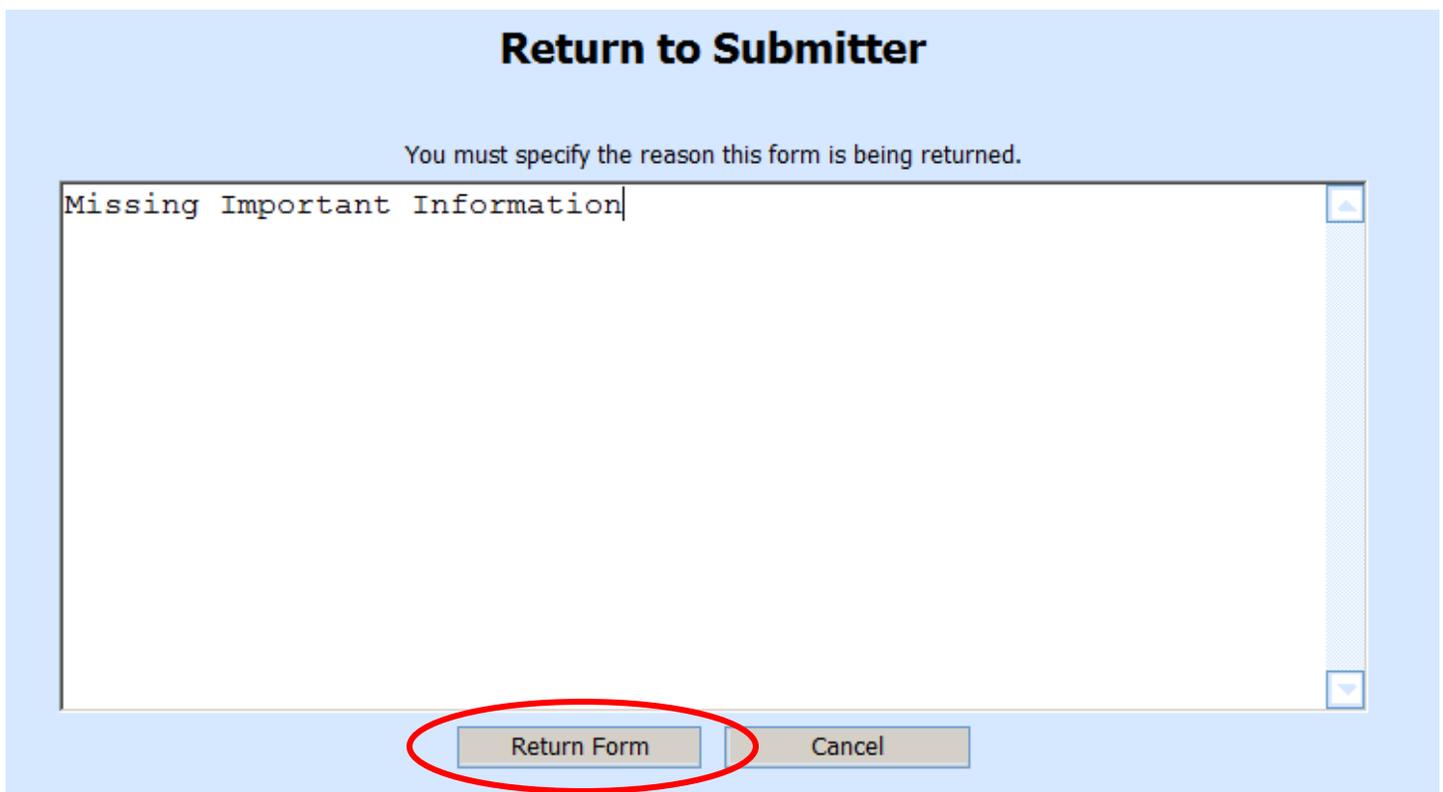
With the EAA form you can only Copy an EAA form that is in an Inactive state, meaning that it has gone through the full process and has been signed off on by the Director/Designee. Notice that in our example, the Copy button is grayed out (cannot use it yet).

Click **Submit**, to Complete Form Authorization.



From the dropdown you can click **Complete Form Authorization** to finalize the EAA form or you can click **Return Form to Submitter** to send the form back to the person that submitted the form to you.

NOTE: If you send the form back to the Submitter, you will be required to send a message back to the Submitter stating why the form is being returned. Enter the Note and then click **Return Form**.



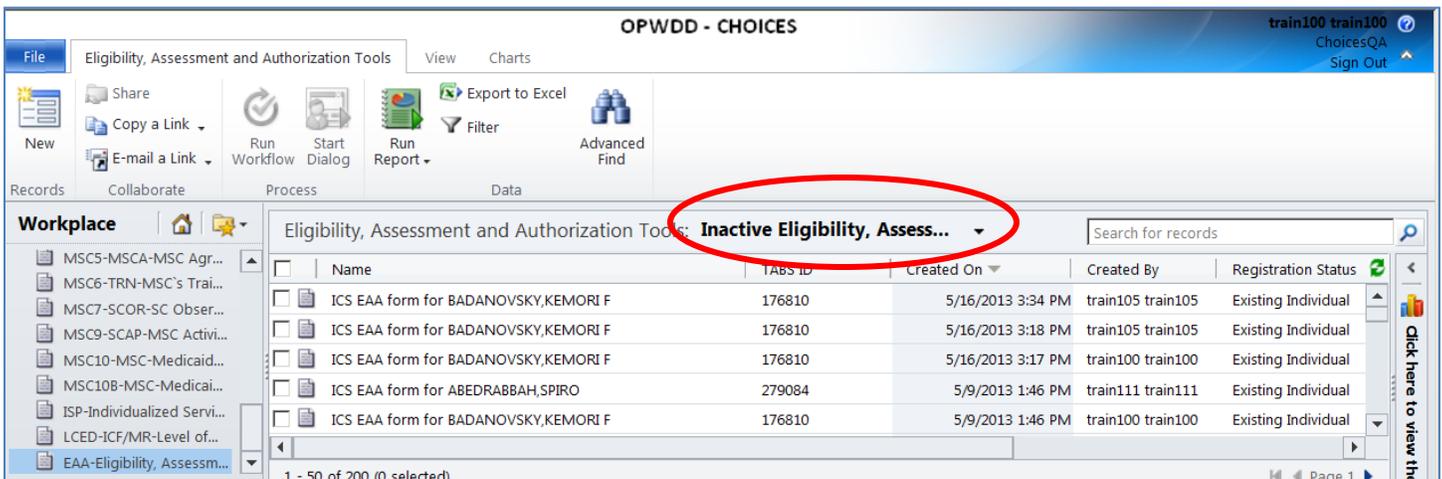
In this case we will complete the Form Authorization, so we click **Complete Form Authorization**.

Once the EAA form is Authorized you will see a new message in the Messages section of the form.



To close the form just click the 'X' in the top right-hand corner of the screen.

This completed form can now be found in the **Inactive** view of the EAA forms from the Main CHOICES Screen, because it is now finalized and locked.



This completes the Step-by-Step for EAA – Authorization, if you need to see how to enter information for an EAA form or complete Registration of the EAA form please check the **EAA – Entry and Registration Step-by-Step**.