

## [Completing Registration for an Individual through the EAA form.](#)

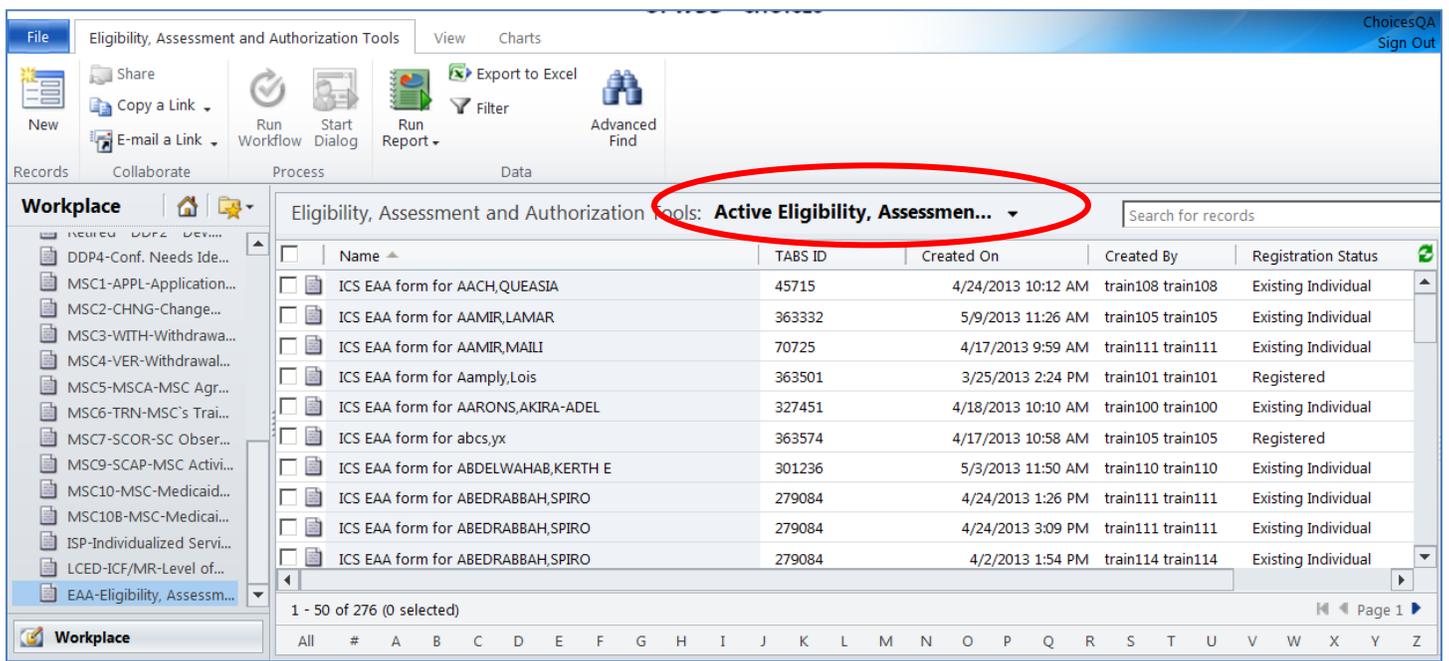
The Eligibility, Assessment and Authorization Tool (EAA), is a form used to guide Regional Office (RO) Staff through the processes associated with OPWDD's Front Door. The EAA Tool records vital information as it is obtained from "new" people seeking supports and/or services through OPWDD. This tool will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

A person with the EAA entry role would begin filling out the EAA form for a person that is not known to our TABS system. At some point early in the process of filling out information on the person they are working with, they will send the EAA form for Registration, so the person would be granted a TABS ID and be identified by our system.

**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 Registration**

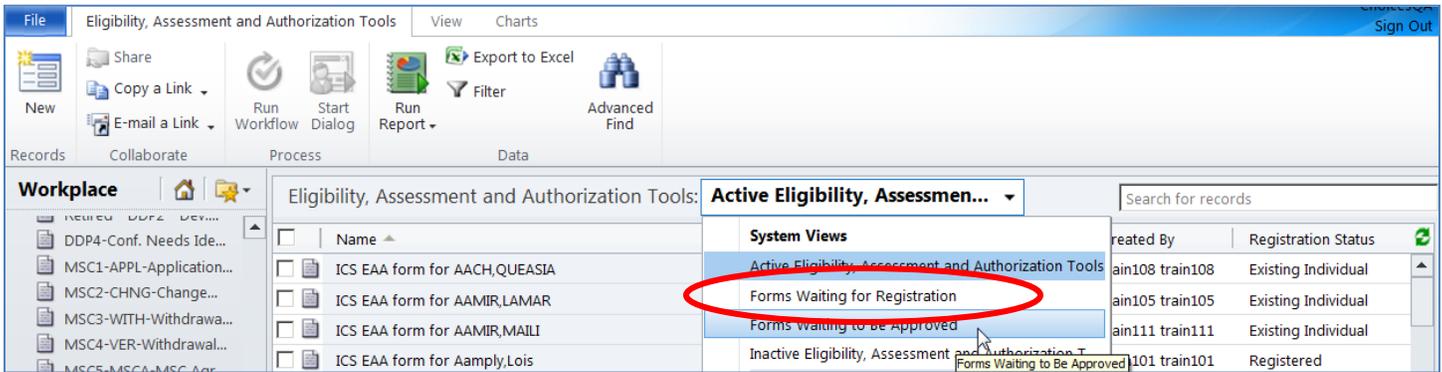
Click on the *EAA* section from the main CHOICES page and click the Active Eligibility, Assessment and Authorization dropdown .



The screenshot shows the CHOICES software interface. The top menu bar includes 'File', 'Eligibility, Assessment and Authorization Tools', 'View', and 'Charts'. The 'Eligibility, Assessment and Authorization Tools' menu is open, showing options like 'Run Workflow', 'Start Dialog', 'Run Report', 'Filter', and 'Advanced Find'. The 'Active Eligibility, Assessment and Authorization' dropdown menu is circled in red. Below the menu is a table of EAA forms with the following columns: Name, TABS ID, Created On, Created By, and Registration Status. The table contains 10 rows of data, including names like 'AACH, QUEASIA', 'AAMIR, LAMAR', and 'ABEDRABBAH, SPIRO'. The bottom of the interface shows a 'Workplace' sidebar and a status bar indicating '1 - 50 of 276 (0 selected)' records.

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 for Registration**.



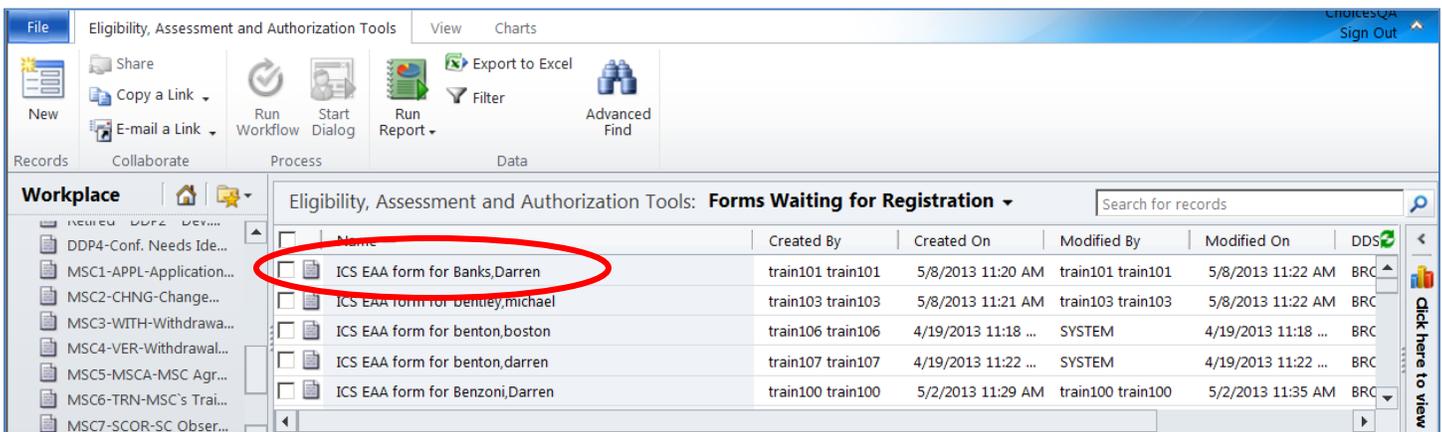
This will bring you into the View that shows all EAA forms where the person on the form is waiting to be registered to TABS. This screen displays the Individual's name and TABS ID along with the date the form was created, who created the form and who submitted the form.

**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 created the form, I would just click the **Created by** column heading.

Name	Created By	Created On
ICS EAA form for smith,barney	train100 train100	4/17/2013 12:58 ...
ICS EAA form for Hur,Ben	train106 train106	5/3/2013 11:34 AM
ICS EAA form for smith,jim	train104 train104	5/9/2013 2:56 PM

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 Register to TABS, 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.

The screenshot displays the 'Eligibility, Assessment and Authorization Tool' (EAA) interface. The window title is 'Eligibility, Assessment and Authorization Tool' and 'Form Actions'. The ribbon includes 'File', 'Save & New', 'Sharing', 'Form Actions', and 'Data'. The main content area shows the 'ICS EAA form for Banks, Darren' with a left-hand navigation menu and a main form area. The form is titled 'Individual's Information' and contains fields for Individual, Last Name, First Name, Middle Initial, TABS ID, Date Of Birth, Address Line 1, Address Line 2, City, State, Zip Code, County of Residence (set to BROOME), Phone Number, and Residence Type.

You can 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. [Eligibility Determination](#) or [Assessment Information](#), etc..)

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

## Complete Registration

Once you have finished viewing the EAA form you are ready to **Register the Individual to TABS**.

Click, **Form Actions**

The screenshot shows the 'Eligibility, Assessment and Authorization Tool' interface. The 'Form Actions' tab is circled in red. The interface includes a sidebar with 'Information' and a main content area with 'Individual's Information' and 'Individual Information' fields.

**Form Actions**

- Save
- Save & Close
- Save & New
- Sharing
- Copy a Link
- E-mail a Link
- Run Workflow
- Start Dialog
- Run Report

**Information**

- Individual's Information
- Developmental Disabilities ...
- Service Coordination Infor...
- Initial Participant Contact
- Eligibility Determination
- Individual's Needs and Inte...
- Assessment Information
- Natural and Community Su...

**Eligibility, Assessment and Authorization Tool**  
**ICS EAA form for Banks, Darren**

**Individual's Information**

**Individual Information**

Individual

Last Name \*

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

The screenshot shows the 'Form Actions' tab in the EAA tool. The buttons are: Submit, Register, View PDF, and Copy.

**Form Actions**

- Submit
- Register
- View PDF
- Copy

**Submit**, will allow the person entering information on the form and the Director/Designee to Complete the EAA Form.

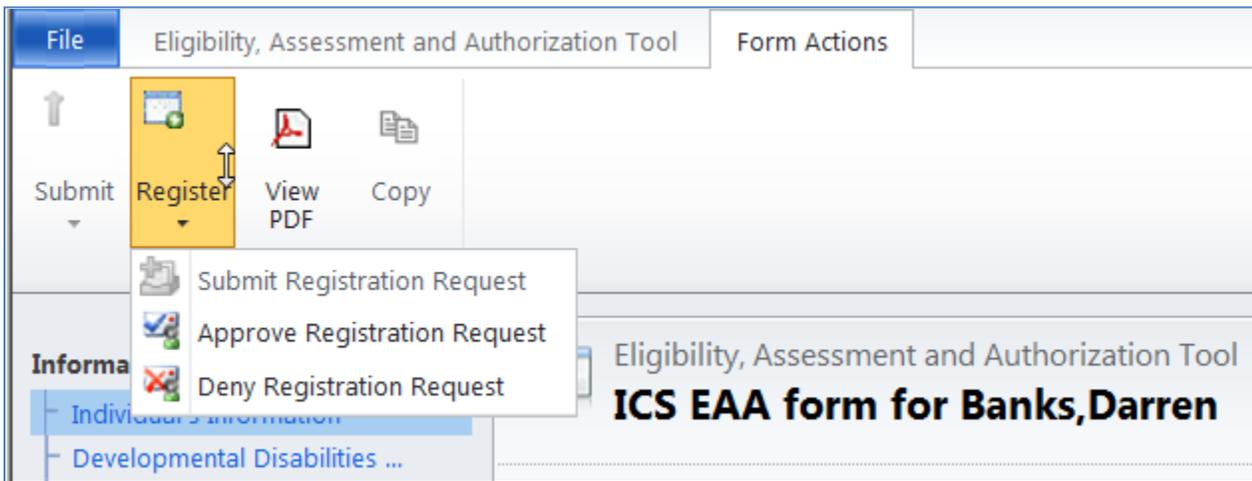
**View PDF**, will display a PDF version of the form.

**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).

**Register**, the Register button will allow the person entering information on the form to send the form for registration. The Register button also allows the people responsible for registering individuals to TABS , to Complete the Registration.

Click **Register**, to Complete Registration to TABS.



From the dropdown you can click **Approve Registration Request** to register the individual to TABS or you can click **Deny Registration Request** to send the form back to the person that submitted the form to you. You would deny the registration if you found that the person is already registered in TABS.

**NOTE:** If you click **Deny Registration Request** it means this person is registered in TABS. You will have to put their TABS ID in the box that pops up and click OK. This will replace the information that the entry person filled in with the correct information for the registered individual. Then Click **OK**.



In this case we will approve the Registration request, so we click **Approve Registration Request**. The request will process and you will see the Individual field will be filled in with the person's name and they now have a TABS ID.

Eligibility, Assessment and Authorization Tool  
**ICS EAA form for Banks, Darren**

**Individual's Information**

Individual: **Banks, Darren** (circled in red)

Last Name \*: Banks

First Name \*: Darren

Middle Initial:

TABS ID: **363651** (circled in red)

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

County of Residence \*: **BROOME**

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

This person will no longer be listed in the **Forms waiting for Registration** view of the EAA forms from the Main CHOICES Screen, because you have just registered the person to TABS.

Eligibility, Assessment and Authorization Tools: **Forms Waiting for Registration**

Name	Created By	Created On	Modified By	Modified On	DDS
ICS EAA form for bentley,michael	train103 train103	5/8/2013 11:21 AM	train103 train103	5/8/2013 11:22 AM	BRC
ICS EAA form for benton,boston	train106 train106	4/19/2013 11:18 ...	SYSTEM	4/19/2013 11:18 ...	BRC
ICS EAA form for benton,darren	train107 train107	4/19/2013 11:22 ...	SYSTEM	4/19/2013 11:22 ...	BRC
ICS EAA form for Benzoni,Darren	train100 train100	5/2/2013 11:29 AM	train100 train100	5/2/2013 11:35 AM	BRC
ICS EAA form for Benzouni,John	train111 train111	5/2/2013 11:30 AM	train106 train106	5/3/2013 11:40 AM	BRC

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