DDP1 – Registration / Movement Form

The Registration/Movement Form (DDP-1) may be used to register a new individual through CHOICES into the Tracking and Billing System (TABS). A DDP1 may be used for an existing individual, to add a new program, remove from the system, show a transfer within the agency, change demographics, or document that an individual died or moved out of state.

CHOICES has been developed to automate the process of completing and transmitting forms and generating certain reports.

There is no “Delete” function in CHOICES.

The section below shows what an end user will see in the CHOICES system upon logon. Depending on your role in the system some items may or may not be available to you.

The first screen displayed:

“Announcements” - will explain new features or give helpful information.

A The Workplace Menu / navigation column is how to move around inside the application.
B The toolbar duplicates all the actions available under the Workplace Menu.
C The content pane displays whatever folder is highlighted in the Workplace Menu.
D Display of the user signed on to the system and the Sign Out area.
Add & Register

The **Add** process, shown below, registers a new individual and adds a program for the same individual. The **Register** process only registers a new individual.

**NOTE:** Eligibility processes and or paperwork must still be filed as directed by the DDSO.

To begin, find the **Forms** heading in the navigation column on the left side of the screen. Click on **DDP1-Registration/Movement Form** under this column heading.

The **content pane** will now list active DDP1’s. For the **Add** process, we would expect that a DDP1 would not be listed for the individual you are working on. Proceed to the next step to continue. (Alternatively, to continue working on an existing DDP1, simply click on the desired DDP1 from the list.)

**New Record** appears as the first button in the toolbar. Click **New Record**, and then click on **DDP1-Registration/Movement Form** from the drop-down list.
A new window appears, and the following fields are displayed. You must verify that the individual is not already in the system before entering. Two options are presented here: You can perform a **Lookup by TABS ID** or a **Lookup by other criteria**. Either option has required fields. Enter the required information.

**NOTE:** A red asterisk next to a field heading indicates that completing the field is required to continue. As information is entered, some asterisks may disappear, indicating that enough required information has been entered to proceed. This is demonstrated by entering a **Last Name** in the illustration below. Voluntary Agencies must have one of the three number fields, TABS ID, SS# or Medicaid # in order to perform a ‘Lookup’.

As soon as the required fields for either option are complete, the **Lookup** button will then become available. Click **Lookup**.
One of three situations will occur next:

1) The criteria you entered will produce a list of possible matches, and will list the individual you are looking for. In this case, click on the **TABS ID** number of the individual you are looking for. (The remaining instructions below assume that situation 1 did not occur.)

2) The criteria you entered will produce a list of possible matches, but will not list the individual you are looking for. In this case, click **New Individual**.

3) The criteria you entered will not produce a list of possible matches. In this case, you will receive a red error message. Click **New Individual**.

<table>
<thead>
<tr>
<th>TABS ID</th>
<th>Name</th>
<th>Sex</th>
<th>Date of Birth</th>
<th>Social Security Number</th>
<th>Medicaid CIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>115307</td>
<td>CREEDEN, AMRO</td>
<td>M</td>
<td>03/02/1985</td>
<td>XXX-XX-7784</td>
<td></td>
</tr>
<tr>
<td>327784</td>
<td>CREEDEN, BONTIVA</td>
<td>F</td>
<td>01/10/1991</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26213</td>
<td>CREEDEN, ILEEN W</td>
<td>F</td>
<td>12/04/1954</td>
<td>XXX-XX-6213</td>
<td></td>
</tr>
<tr>
<td>194762</td>
<td>CREEDEN, LISHONE</td>
<td>F</td>
<td>01/18/1969</td>
<td>XXX-XX-4762</td>
<td></td>
</tr>
<tr>
<td>313623</td>
<td>CREEDON, VASILE</td>
<td>M</td>
<td>06/13/2002</td>
<td></td>
<td></td>
</tr>
<tr>
<td>271569</td>
<td>CREEDON, GERSHON</td>
<td>M</td>
<td>10/24/1993</td>
<td>XXX-XX-1569</td>
<td></td>
</tr>
<tr>
<td>74951</td>
<td>CREEDON, JACK M</td>
<td>M</td>
<td>10/19/1976</td>
<td>XXX-XX-4831</td>
<td></td>
</tr>
<tr>
<td>135967</td>
<td>CREEDON, SUABI</td>
<td>F</td>
<td>07/03/1974</td>
<td>XXX-XX-5467</td>
<td></td>
</tr>
<tr>
<td>518695</td>
<td>CREEDON, TILESHA</td>
<td>F</td>
<td>02/12/1965</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Your query did not return any results.**

**Lookup by TABS ID**

**Lookup by other criteria**

Last Name | XXXXX 
Social Security Number
County
Date Of Birth

**Lookup**

New Individual
After clicking **New Individual**, the DDP1 fields open in a new window. Enter all required information as indicated by the red asterisks. Use the scroll bar at the right side of the screen to bring other fields into view. You should enter as much information as you know.

The first field of the DDP1 is **Purpose**. **Add** will automatically appear in this field if you are completing a DDP1 for a new individual. To register and add a program, continue to the other fields without changing **Add** from the drop-down list.
Complete as many fields as possible. Date fields, such as **Date of Birth** and **Date of Registration**, provide Calendar buttons to assist with date entry. You may enter a date manually, or use the Calendar button to complete date fields.

A small calendar will appear with today’s date displayed in a yellow box. To view other months on the calendar, click either the < or > symbol in the upper corners of the calendar as many times as necessary. Once you see the correct date and year displayed in the calendar, simply click on the date to insert it into the date field.

Use the scroll bar at the right side of the screen to bring other fields into view.
Some fields, such as County of Residence, State and Add TABS Program Code, have a Look Up Records button on the far right of the field to assist with data entry. Click the Look Up Records button to continue. A new Look Up Records window will open. Use the scroll bar to view all items in the list that appears. In this case, we are viewing the Program Code list. Click on the appropriate program in the list and click OK.

### Look Up Records

**Select the record you want and click OK.**

<table>
<thead>
<tr>
<th>Program Code</th>
<th>Program Class</th>
<th>Program Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>02330102 -- TOMPKINS REGIONAL CENTER</td>
<td>DEVELOPMENTAL CENTE</td>
<td>OTHER NON-RESIDENT</td>
</tr>
<tr>
<td>02330103 -- DELAWARE REGIONAL CENTER</td>
<td>DEVELOPMENTAL CENTE</td>
<td>OTHER NON-RESIDENT</td>
</tr>
<tr>
<td>02330104 -- BROOME-TIOGA REGIONAL CENTER</td>
<td>DEVELOPMENTAL CENTE</td>
<td>OTHER NON-RESIDENT</td>
</tr>
<tr>
<td>02330105 -- OTSEGO REGIONAL CENTER</td>
<td>DEVELOPMENTAL CENTE</td>
<td>OTHER NON-RESIDENT</td>
</tr>
<tr>
<td>02330110 -- CHENANGO R.C. SATELI. CLINIC</td>
<td>CLINIC</td>
<td>CLINIC</td>
</tr>
<tr>
<td>02330113 -- CHENANGO CONTRACTED CLINIC</td>
<td>CLINIC</td>
<td>CLINIC - OFF SITE</td>
</tr>
<tr>
<td>02330120 -- TOMPKINS R.C. SATELI. CLINIC</td>
<td>CLINIC</td>
<td>CLINIC</td>
</tr>
<tr>
<td>02330130 -- DELAWARE R.C. SATELI. CLINIC</td>
<td>CLINIC</td>
<td>CLINIC</td>
</tr>
<tr>
<td>02330140 -- BROOME-TIOGA R.C.SAT. CLINIC</td>
<td>CLINIC</td>
<td>CLINIC</td>
</tr>
<tr>
<td>02330141 -- HIGH-RISK BIRTH CLINIC</td>
<td>CLINIC</td>
<td>CLINIC - OFF SITE</td>
</tr>
<tr>
<td>02330142 -- HIGH RISK BIRTH CLINIC</td>
<td>CLINIC</td>
<td>CLINIC</td>
</tr>
<tr>
<td>02330144 -- PSYCHOLOGY SERVICES</td>
<td>DEVELOPMENTAL CENTE</td>
<td>OTHER NON-RESIDENT</td>
</tr>
<tr>
<td>02330145 -- PHYSICAL THERAPY SERVICES</td>
<td>DEVELOPMENTAL CENTE</td>
<td>OTHER NON-RESIDENT</td>
</tr>
</tbody>
</table>

1 of 50 selected.
In the Disabilities area of the DDP1, most of the fields are in “radio button” format. To change a radio button from No to Yes, simply click in the white circle next to Yes. A solid black circle will then appear, indicating that Yes is selected. This is shown for the Learning Disability field in the illustration below.
Submission Information and Processing Information sections may appear or function differently depending on your role in CHOICES. Regardless, to submit the DDP1, the Agency/DDSO Contact field must be completed at some point. To submit this document yourself, click the Look Up Records button. A new Look Up Records window appears. Use the scroll bar if necessary, click on your name in the list, and then click OK.
When you are ready to submit this DDP1, click **Submit Form** in the toolbar at the top of the screen.

The *Signature Form* window appears. You must complete the three steps illustrated below to submit your completed DDP1. First, you must click in the white box to agree to the Electronic Signatures and Records Act (ESRA) statement. A check mark will appear in the box. Second, for the **Enter Password** field, you must enter the same password you used to sign-in to this CHOICES session (your enterprise password). The third and final step is to click **Submit**.

![Signature Form -- Webpage Dialog](image)
The **DDP1-Registration/Movement Form** window closes, and the CHOICES content pane still lists active DDP1’s. Clicking the **DDP1-Registration/Movement Form** button under the **Forms** heading will refresh this screen, and the DDP1 you just created should now appear in this list.

Congratulations! Your DDP1-Registration/Movement Form has been successfully submitted.
NOTE:
At any time, if you want to stop working on a DDP1 form but wish to return to it later, click either the Save or Save and Close button.

To continue working on a saved DDP1, click the DDP1-Registration/Movement Form button under the Forms heading. Next, double-click on the desired DDP1 from the list to continue working on it.

A saved DDP1 will have additional buttons in the toolbar, View PDF and Copy as shown below. View PDF allows you to open a printable version of the saved DDP1. Copy allows you to copy all information from the saved form for creating a new form. This is especially useful if the original form was not approved, and you want to recreate a new form with the same information without manually re-performing the data-entry.
Beyond Add & Register

**NOTE:** The “Beyond Add & Register” process, shown below, applies to the following DDP1 Purpose choices: Demographic Data Change, Moved out of State, Remove, Died, and Transfer Within Agency. The instructions here assume that the individual has already been registered and added to a program.

To begin, find the **Forms** heading in the navigation column on the left side of the screen. Click on **DDP1-Registration/Movement Form** under this column heading.

The **content pane** will now list active DDP1's. For the “Beyond Add & Register” process, we would expect that a DDP1 will be listed for the individual you are working on. Double-click on the desired DDP1 from the list.

The selected DDP1 form will open. In the **toolbar**, click **Copy**.
A pop-up will remind you to save the form with the copied data. Click **OK**.

Select the appropriate purpose for this new DDP1 form. In the example below, **Remove** is illustrated.
Use the scroll bar to view the **Agency / Program Information** area of the DDP1. Then, click on the **Look Up Records** button in the **Remove TABS Program Code** field.
A **Look Up Records** window opens. Click on the appropriate **Program Code** in the list (the list may contain only one **Program Code**), and click **OK**.

Next, complete the **Remove / Add Date** field in the DDP1 using the **Calendar** button. Please note that this cannot be a date in the future. Then, use the scroll bar to view the **Submission Information** area.
Submission Information and Processing Information sections may appear or function differently depending on your role in CHOICES. Regardless, to submit the DDP1, the Agency/DDSO Contact field must be completed at some point. To submit this document yourself, click the Look Up Records button. A new Look Up Records window appears. Use the scroll bar if necessary, click on your name in the list, and then click OK.

Click Save in the toolbar. (Because a new DDP1 was created by copying another form, the new DDP1 must be saved before submitting.)
When you are ready to submit this DDP1, click **Submit Form** in the toolbar at the top of the screen.

The **Signature Form** window appears. You must complete the three steps illustrated below to submit your completed DDP1. First, you must click in the white box to agree to the Electronic Signatures and Records Act (ESRA) statement. A check mark will appear in the box. Second, for the **Enter Password** field, you must enter the same password you used to sign-in to this CHOICES session (your enterprise password). The third and final step is to click **Submit**.

Congratulations! Your DDP1-Registration/Movement Form has been successfully submitted.