

MSC10 – Service Coordination Monthly Notes

The MSC10 is a monthly summary of activities. The Service Coordinator may indicate within the form if an ISP Review, Service Coordination Agreement Review or Level of Care Eligibility Determination (LCED) was completed.

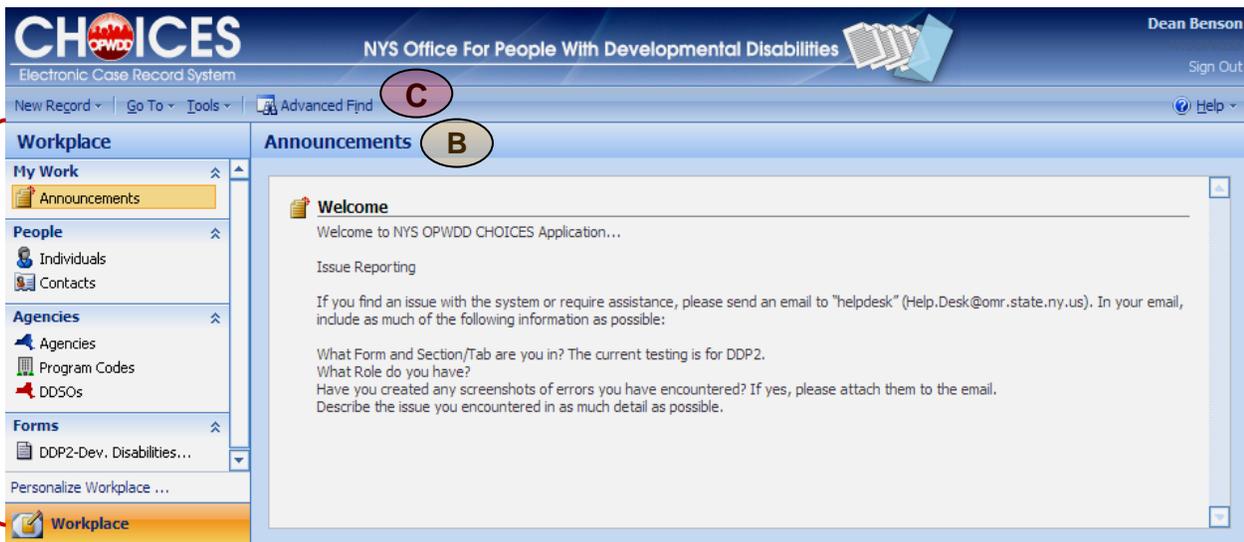
In a particular month the Service Coordinator may document multiple activities such as a face to face contact with the individual; one entry under Referral/Linkage; and an entry within the Monthly Summary.

If the form is not completed by the 15th of the following month, the form locks and becomes inactive.

This form can only be completed by a Service Coordinator (MSC Coordinator) and a Service Coordinator Supervisor (MSC Supervisor).

- CHOICES has been developed to automate the process of completing and transmitting forms and generating certain reports.
- The workflow is *Individual* driven; so, it is recommended that work begin on any form by selecting the Individual first and then selecting the necessary form or report to view. (Shown later in document).
- In CHOICES, there is NO delete function. If a mistake is made on a form before saving or submitting, just close and nothing is saved. Once a form is saved, a new form will need to be completed with the correct information.

Upon logging into CHOICES, the default is to “Announcements,” which notes System messages, explains new features or gives helpful information. Depending on your role, only certain items may be available.



A The Workplace Menu or navigation column is how to move around inside the application.

B The content pane displays the folder you have highlighted in the Workplace Menu.

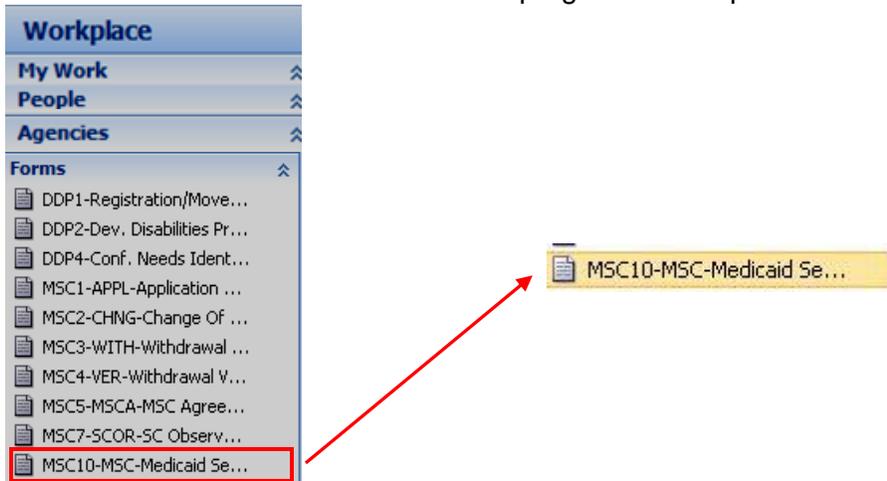
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The Toolbar which duplicates all the actions available under the Workplace Menu

- D Display of the user signed on to the system and the **Sign Out** Area.

Location of Forms

- 1) On the left side, under **Workplace**, is the **Forms** section which is the **central** filing location. Click on the link to see the full list of forms in progress or completed and their current status.



The content pane will display any active or inactive saved forms:

The screenshot shows a table titled 'MSC10-MSC-Medicaid Service Coordination Notes'. A search bar is at the top left, and a 'View' dropdown menu is set to 'Active MSC 10-MSC-Medicaid Service Coordination Notes'. The table has the following columns: Name, Month of Service, Year of Service, Created By, Created On, Modified By, Modified On, and Status Reason. The data rows are:

Name	Month of Service	Year of Service	Created By	Created On	Modified By	Modified On	Status Reason
MSC10 for Adams, Mary	April	2011	train128 train128	4/22/2011	SYSTEM	4/22/2011	Active
MSC10 for AGAMIE, SUNJEEV	March	2011	train162 train162	4/22/2011	SYSTEM	4/22/2011	Active
MSC10 for JONES, JANE	March	2011	train128 train128	4/22/2011	train128 train128	4/22/2011	Active
MSC10 for JONESES, CAROL	April	2011	train128 train128	4/22/2011	SYSTEM	4/22/2011	Active

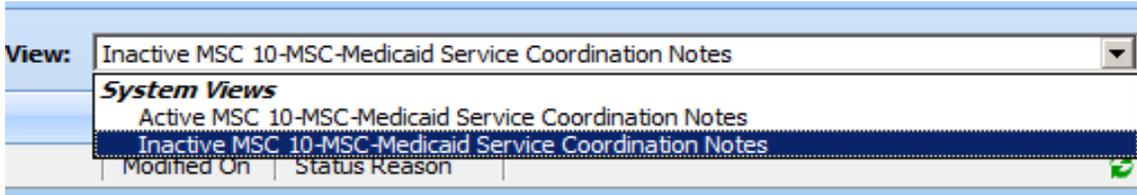
The **View** above is set to **Active MSC10**. You can see the status of each.

• **Month of Service/Year of Service** means the Month of Service and Year of Service that services was rendered to the individual.

• **Status Reason** means that a MSC10 was created and saved and is active and waiting to be submitted. **This form has a limited active life.** There can be no entry into any area of this form after the 15th of the following month. After this time, the form will become inactive, whether or not all sections have been signed. This form does not have copy form forward capability.

NOTE: A form becomes “Completed” once the Service Coordinator’s or Service Coordinator’s Supervisor electronically signs the monthly summary. After the form is submitted it is moved to the Inactive view.

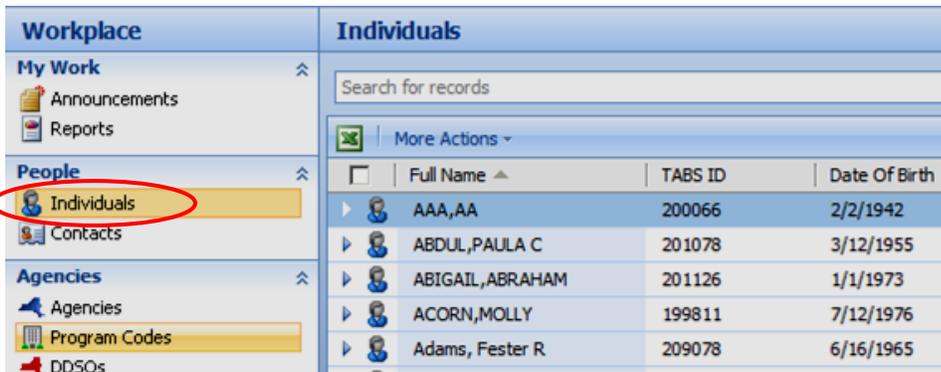
Use the dropdown arrow to highlight **Inactive** to view any forms that have been submitted to the DDSO Coordinator for review. **Inactive** forms cannot be changed.



2) All forms are also filed under the **Individual** for whom they were created.

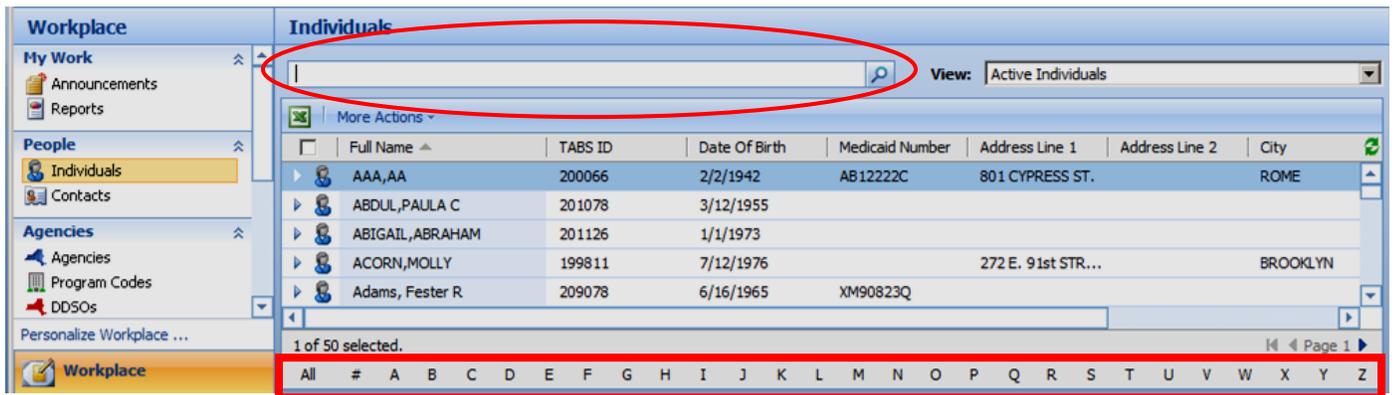
Create a New Form

To create a new MSC10 go to **Workplace**, under **People**, click the “**Individuals**” link:



The Individuals section displays everyone that is known to TABS.

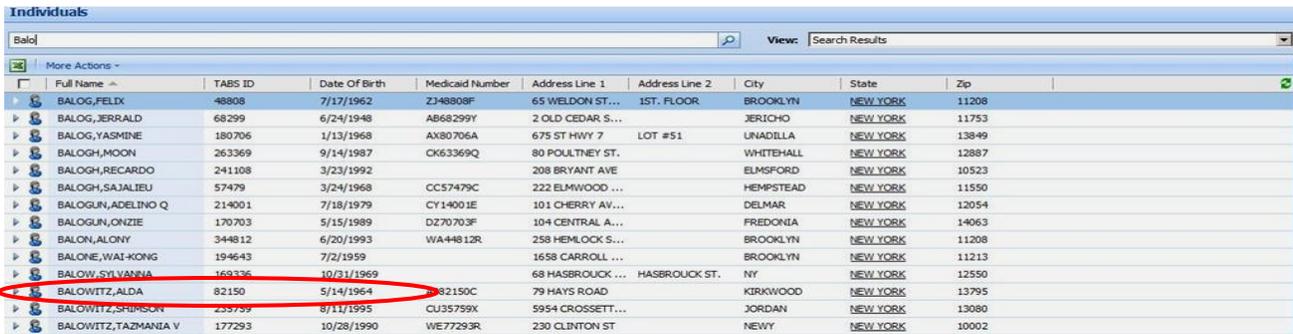
In the Individuals section, you can search by name in either the area where it states **Search for records** or by clicking the first letter of the last name at the bottom of the screen.



In this example, we want to look for Alda Balowitz. So, we'll enter her last name in the Search for records section. Then, click the **Start Search** button .

A list matching our search displays.

To start an MSC10 for Alda Balowitz, **double-click** that name from the list.

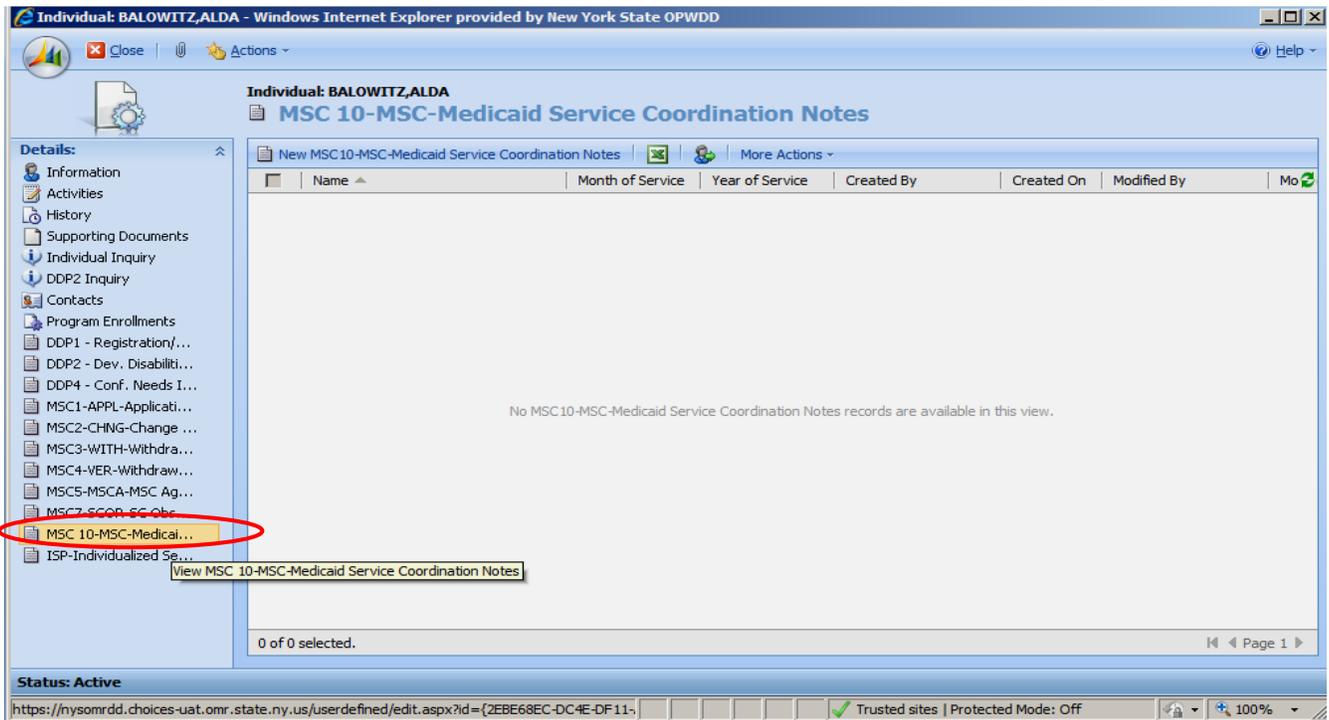


Full Name	TABS ID	Date Of Birth	Medicaid Number	Address Line 1	Address Line 2	City	State	Zip
BALOG, FELIX	48808	7/17/1962	Z348808F	65 WELDON ST...	1ST. FLOOR	BROOKLYN	NEW YORK	11208
BALOG, JERRALD	68299	6/24/1948	AB68299Y	2 OLD CEDAR S...		JERICO	NEW YORK	11753
BALOG, YASMINE	180706	1/13/1968	AX80706A	675 ST HWY 7	LOT #51	UNADILLA	NEW YORK	13849
BALOGH, MOON	263369	9/14/1987	CK63369Q	80 POULTNEY ST.		WHITEHALL	NEW YORK	12887
BALOGH, RECARDO	241108	3/23/1992		208 BRYANT AVE		ELMSFORD	NEW YORK	10523
BALOGH, SAJALIEU	57479	3/24/1968	CC57479C	222 ELMWOOD ...		HEMPSTEAD	NEW YORK	11550
BALOGUN, ADELINO Q	214001	7/18/1979	CY14001E	101 CHERRY AV...		DELMAR	NEW YORK	12054
BALOGUN, ONZIE	170703	5/15/1989	DZ70703F	104 CENTRAL A...		FREDONIA	NEW YORK	14063
BALON, ALONY	344812	6/20/1993	WA44812R	258 HEMLOCK S...		BROOKLYN	NEW YORK	11208
BALONE, WAI-KONG	194643	7/2/1959		1658 CARROLL ...		BROOKLYN	NEW YORK	11213
BALOW, SYLVANNA	169336	10/31/1969		68 HASBROUCK ...	HASBROUCK ST.	NY	NEW YORK	12550
BALOWITZ, ALDA	82150	5/14/1964	82150C	79 HAYS ROAD		KIRKWOOD	NEW YORK	13795
BALOWITZ, SHIMSON	233739	8/11/1995	CU35739X	5954 CROSSETT...		JORDAN	NEW YORK	13080
BALOWITZ, TAZMANIA V	177293	10/28/1990	WE77293R	230 CLINTON ST		NEWY	NEW YORK	10002

A screen appears with her information pulled directly from TABS.

Confirm that the Individual displayed is the correct person by reviewing the pre-populated fields.

On the left side of the screen under **Details**, click **MSC10-MSCA-MSC Ag...** link.



Individual: BALOWITZ, ALDA

MSC 10-MSC-Medicaid Service Coordination Notes

Details:

- Information
- Activities
- History
- Supporting Documents
- Individual Inquiry
- DDP2 Inquiry
- Contacts
- Program Enrollments
- DDP1 - Registration/...
- DDP2 - Dev. Disabiliti...
- DDP4 - Conf. Needs I...
- MSC1-APPL-Applicati...
- MSC2-CHNG-Change ...
- MSC3-WITH-Withdra...
- MSC4-VER-Withdraw...
- MSC5-MSCA-MSC Ag...
- MSC 10-MSC-Medicaid Service Coordination Notes**
- ISP-Individualized Se...

Name	Month of Service	Year of Service	Created By	Created On	Modified By	Mo
No MSC10-MSC-Medicaid Service Coordination Notes records are available in this view.						

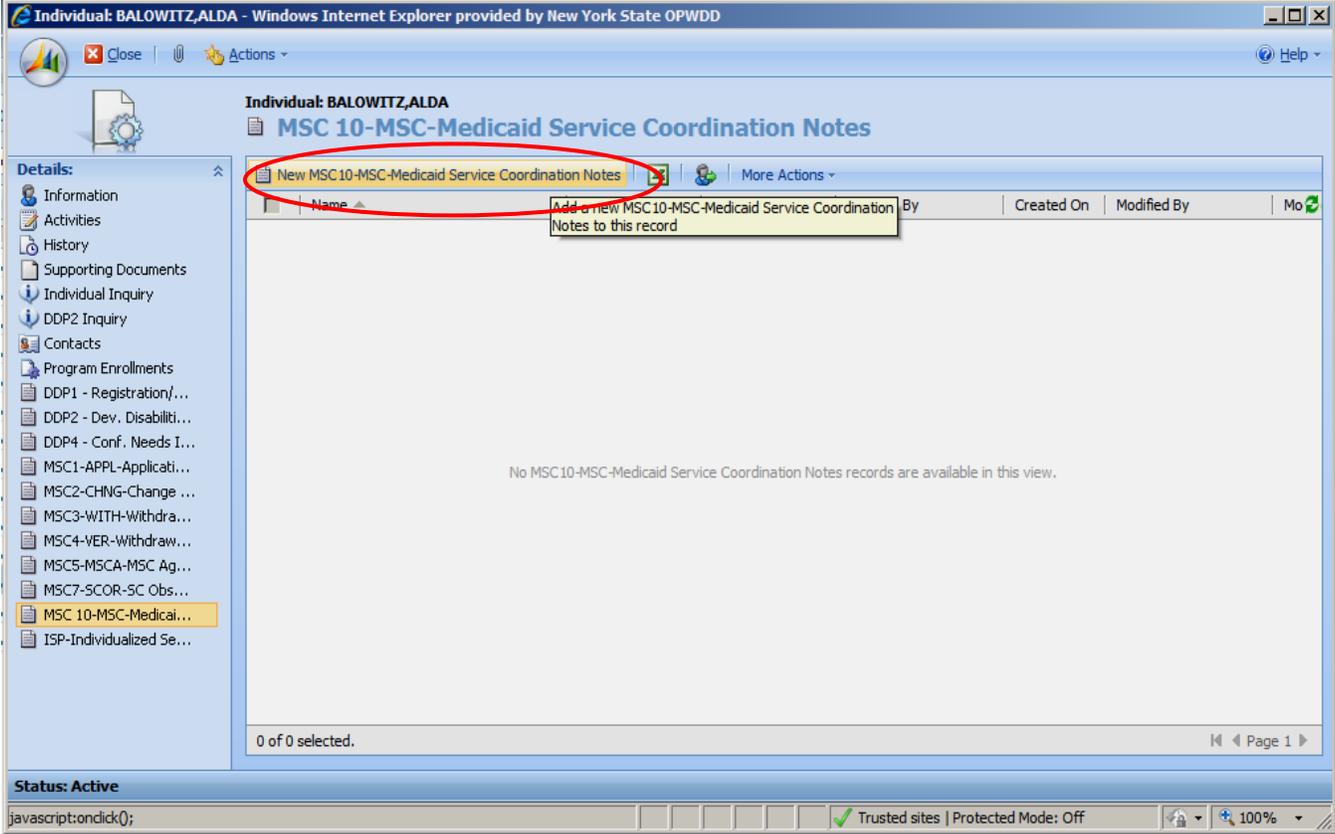
0 of 0 selected. Page 1

Status: Active

https://nysomrdd.choices-uat.omr.state.ny.us/userdefined/edit.aspx?id={2EBE68EC-DC4E-DF11-...} Trusted sites | Protected Mode: Off

Currently, there is no MSC10 for Alda.

To start a new agreement, click the **New –MSC10-MSCA-MSC Agreement** link.



Completing the Form

Upon opening, the **General** tab is displayed.

The screenshot shows a web browser window titled "MSC10-MSC-Medicaid Service Coordination Notes: New - Windows Internet Explorer provided by New York State OPWDD". The browser's address bar shows "MSC10-MSC-Medicaid Service Coordination Notes: New". The page content is titled "Information" and has two tabs: "General" and "Monthly Summary". The "General" tab is selected. The form contains the following sections and fields:

- Individual:** A text field containing "BALOWITZ,ALDA", a search icon, a "Month of Service *" dropdown menu, and a "Year of Service *" dropdown menu.
- Agency Name *:** A text field containing "0233 - BROOME", a search icon, and a "Year of Service *" dropdown menu.
- Show form in CHOICES Portal?:** Radio buttons for "No" and "Yes".
- ISP Review:**
 - "Was an ISP Review conducted this month?": A dropdown menu.
 - "Date of ISP Review": A date input field with a calendar icon.
 - "Was the Individual Present at Review?": A dropdown menu.
 - "Service Coordinator's Electronic Signature": A text field with a search icon.
 - "Sign ISP Review": A button.
- Service Coordination Agreement (SCA) Review:**
 - "Was the SCA reviewed this month?": A dropdown menu.
 - "Date of SCA Review": A date input field with a calendar icon.
 - "Service Coordinator's Electronic Signature": A text field with a search icon.

The status bar at the bottom of the browser window shows "Status: New" and "Trusted sites | Protected Mode: Off".

The MSC10 form consists of two tabs: General and Monthly Summary. The General tab has several sections: a header, an ISP Review Section, a Service Coordination Agreement (SCA) Review Section, and an ICF/MR Level Care Eligibility Determination Section (LCED). The Monthly Summary has one section.

Within the General Tab, the Service Coordinator can fill out sections in any order.

ISP Review Section (This section is optional)

By completing the Month of Service and Year of Service drop down boxes the system searches to find if an ISP exists in the system for the selected month and year. If an ISP exists in the system for the selected month and year, the system will default to the date that of the last ISP Review and populate the field “Date of ISP Review” in ISP Review Section. The system will also set “Was ISP Review conducted this month?” to Yes and the system will check for a “Face-to-Face” value and if yes, default in yes for “Was individual present at ISP Review?”

MSC10-MSC-Medicaid Service Coordination Notes: New - Windows Internet Explorer provided by New York State OPWDD

Save and Close Help

MSC10-MSC-Medicaid Service Coordination Notes: New

Information

Details:

- Information
- Activities
- History
- Supporting Documents
- Face-to-Face Contacts
- Referral/Linkage, Be...

General Monthly Summary

Individual: BALOWITZ, ALDA

Agency Name *: Q233 - BROOME

Month of Service *: April

Year of Service *: 2011

Show form in CHOICES Portal? No Yes

ISP Review

Was an ISP Review conducted this month? Yes

Date of ISP Review: 4/25/2011

Was the Individual Present at Review? Yes

Service Coordinator's Electronic Signature

Sign ISP Review

Service Coordination Agreement (SCA) Review

Was the SCA reviewed this month?

Date of SCA Review

Service Coordinator's Electronic Signature

Status: New

Done Trusted sites | Protected Mode: Off 100%

NOTE: Users may complete an ISP while the MSC-10 form the Service Coordinator is working on is still active.

If there was no ISP Review in CHOICES for the individual, the system enables, “Was an ISP Review conducted this month?” Selecting “Yes” for “Was an ISP Review conducted this month,” enables “Date of ISP Review,” and “Was the Individual Present at Review?” becomes enabled.

NOTE: “Date of ISP Review” must be the same as the Month and Year of Service selected in the header.

MSC10-MSC-Medicaid Service Coordination Notes: New - Windows Internet Explorer provided by New York State OPWDD

Save and Close Help

MSC10-MSC-Medicaid Service Coordination Notes: New

Information

Details:

- Information
- Activities
- History
- Supporting Documents
- Face-to-Face Contacts
- Referral/Linkage, Be...

General Monthly Summary

Individual: BALOWITZ,ALDA

Agency Name *: 0233 - BROOME

Month of Service *: March

Year of Service *: 2011

Show form in CHOICES Portal? No Yes

ISP Review

Was an ISP Review conducted this month? Yes

Date of ISP Review

Was the Individual Present at Review? No

Service Coordinator's Electronic Signature

Sign ISP Review

Service Coordination Agreement (SCA) Review

Was the SCA reviewed this month?

Date of SCA Review

Service Coordinator's Electronic Signature

Status: New

Done Trusted sites | Protected Mode: Off 100%

The Service Coordinator can click save  or save and close at this point to return later to sign or click on “Sign ISP Review.” Clicking save will not generate an error because Date of ISP Review is blank.

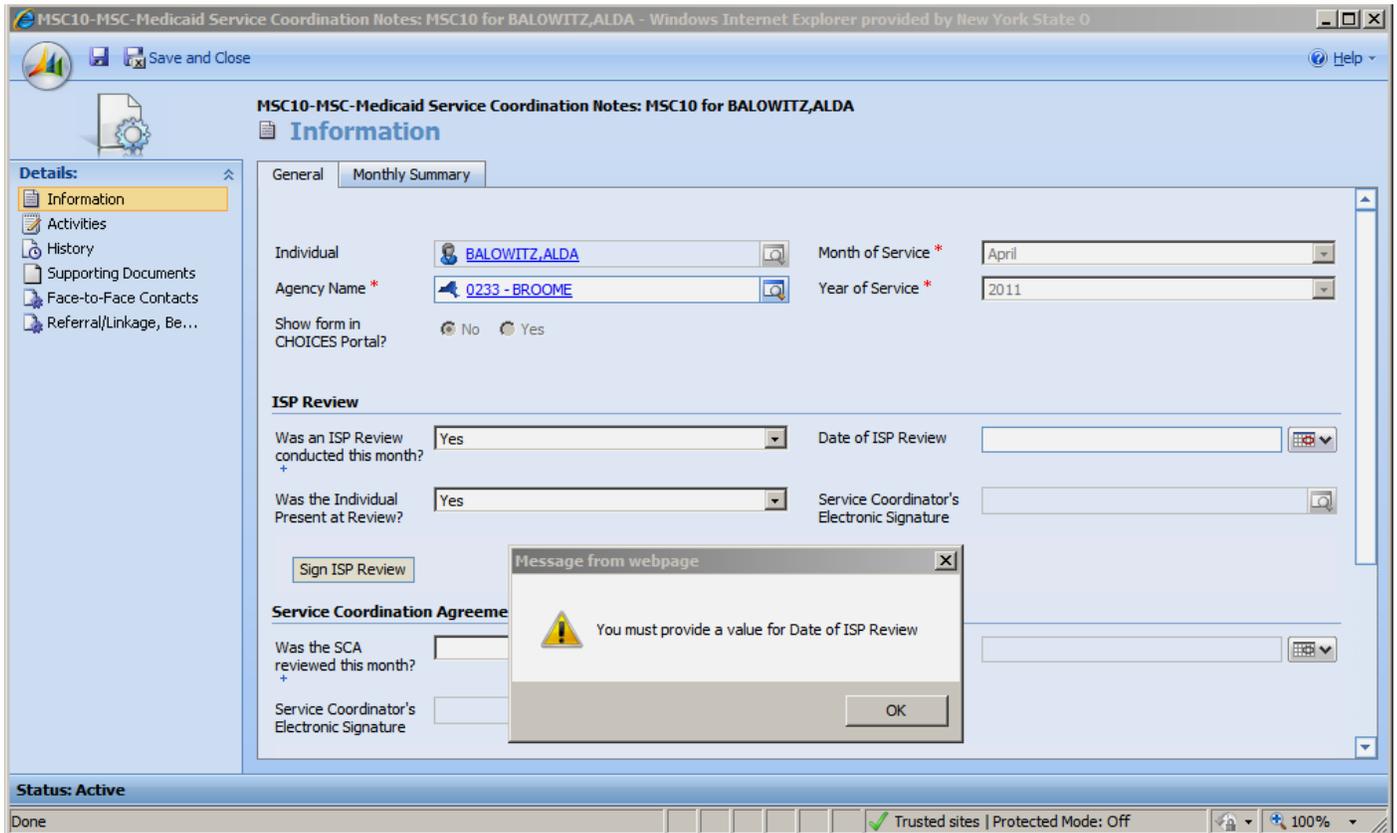
After saving and closing the monthly summary, the MSC10 main screen for Alda Balowitz appears.

The screenshot shows a web browser window titled "Individual: BALOWITZ,ALDA - Windows Internet Explorer provided by New York State OPWDD". The main content area is titled "MSC 10-MSC-Medicaid Service Coordination Notes" and contains a table with the following data:

	Name	Month of Service	Year of Service	Created By	Created On	Modified By	Mo
▶	MSC10 for BALOWITZ,ALDA	April	2011	train128 train128	4/27/2011	train128 train128	4/27/
▶	MSC10 for BALOWITZ,ALDA	April	2011	train128 train128	4/27/2011	train128 train128	4/27/

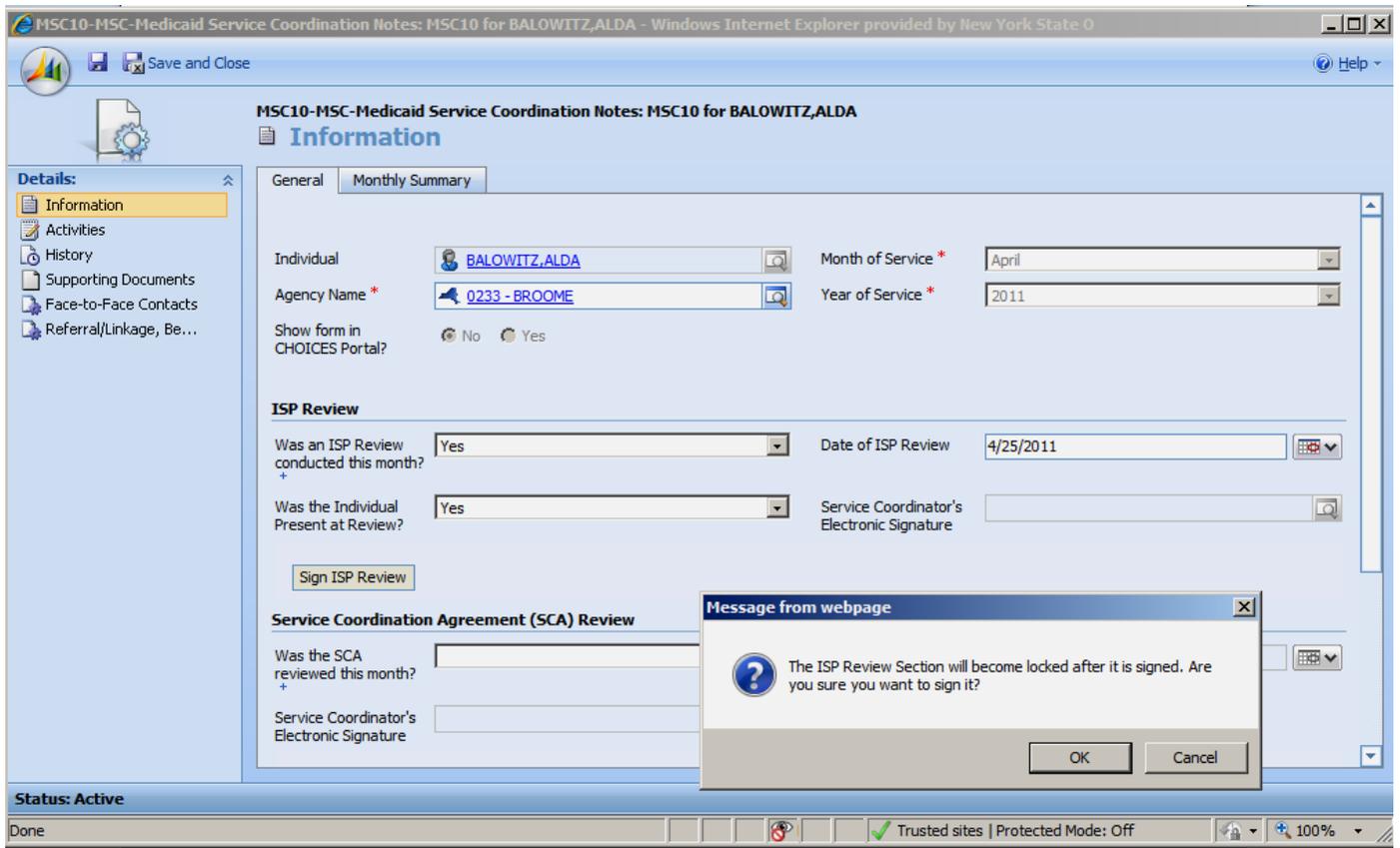
Below the table, it indicates "1 of 2 selected." and "Page 1". The left sidebar shows a "Details" menu with "MSC 10-MSC-Medicaid..." selected. The status bar at the bottom shows "Status: Active" and "Trusted sites | Protected Mode: Off".

When the Service Coordinator is ready to input the date of the ISP Review, the Service Coordinator opens the MSC10 for Alda from the main MSC10 screen.



If the Service Coordinator clicks “Signed ISP Review,” and has left the Date of ISP Review blank the system notifies user of error.

The ISP must be signed and the date field must be completed in order to sign the Monthly summary. Click on the text box, Sign ISP Review and the following dialog box will appear. The ISP will become locked after it is signed.



The Service Coordinator clicks Ok.

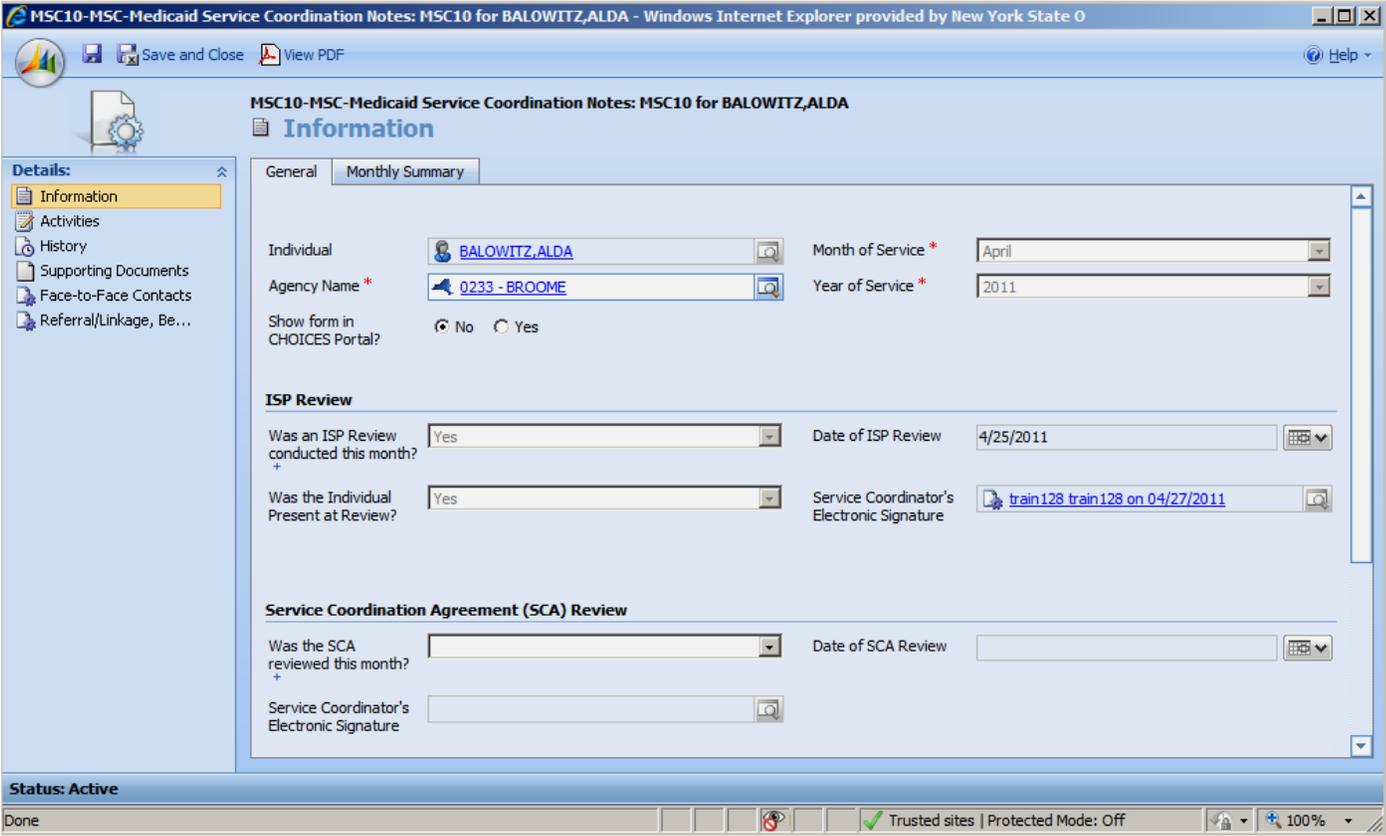
Signature Form screen displays.

Please read the informational paragraph then click the box noting – “**By checking this box...**” (this process is the same for all forms).

The screenshot shows a web browser window titled "Signature Form -- Webpage Dialog". The main heading is "Signature Form". Below the heading is a paragraph of text: "Article III of the New York State Technology Law (Chapter 57-A of the Consolidated Laws of New York), the Electronic Signatures and Records Act (ESRA) § 304 (2) states the following, an electronic signature may be used by a person in lieu of a signature affixed by hand. By re-entering your network password and checking the box to agree to the terms and conditions herein, and clicking the submit button, you are authenticating that you are, in fact, the user associated with the user-ID below. Any document electronically signed after this authentication will be subject to the same laws that are applicable to a paper document you have signed by hand (ESRA § 304 (2)). PROTECT THIS SESSION ACCORDINGLY. Do not allow anyone else access to this application once you have authenticated." Below this text is a checkbox with the text "By checking this box you agree to the above." The checkbox is circled in red. Below the checkbox is the instruction "Please enter your password to sign this form electronically." followed by the following fields: "Individual Name: BALOWITZ,ALDA", "Service Coordinator: train128 train128", and "Enter Password:" followed by an empty password input field, which is also circled in red. At the bottom of the form are three buttons: "Submit", "Reset", and "Close". The "Submit" button is circled in red. The browser's address bar at the bottom shows "https://nysomrdd.choices- Trusted sites | Protected Mode: Off" with a lock icon on the right.

After checking the check box, the Service Coordinator enters their password and clicks the submit button.

After the Service Coordinator completes the signature form, the Service Coordinator's signature and date of signature appears. ISP Review section is now disabled /locked from further changes. "Sign ISP Review" is no longer shown. Form can be shown in Portal.



Service Coordination Agreement (SCA) Review (This section is optional)

By completing the Month of Service and Year of Service drop down boxes, this enables, “Was a SCA reviewed this month.”

Multiple Service Coordinators can complete this section, for instance, one Service Coordinator can select “Yes” for SCA Review and this enables the “Date of SCA Review.”

“Date of SCA Review” must be the same as the Month and Year of Service selected in the form in the header.

The Service Coordinator can save form without providing date.

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0

Save and Close View PDF Help

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Information

Details:

- Information
- Activities
- History
- Supporting Documents
- Face-to-Face Contacts
- Referral/Linkage, Be...

General Monthly Summary

Individual: BALOWITZ,ALDA

Agency Name *: 0233 - BROOME

Month of Service *: April

Year of Service *: 2011

Show form in CHOICES Portal? No Yes

ISP Review

Was an ISP Review conducted this month? Yes

Date of ISP Review: 4/25/2011

Was the Individual Present at Review? Yes

Service Coordinator's Electronic Signature: train128 train128 on 04/27/2011

Service Coordination Agreement (SCA) Review

Was the SCA reviewed this month? Yes

Date of SCA Review:

Service Coordinator's Electronic Signature:

Sign SCA Review

Status: Active

Done Trusted sites | Protected Mode: Off 100%

Another Service Coordinator may open the form and enter date of SCA review and sign the section. The SCA must be signed in order to sign the Monthly summary. Click on the text box. The SCA will become locked after it is signed.

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0

Save and Close View PDF Help

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Information

Details:

- Information
- Activities
- History
- Supporting Documents
- Face-to-Face Contacts
- Referral/Linkage, Be...

General Monthly Summary

Individual: BALOWITZ,ALDA Month of Service *: April

Agency Name *: 0233 - BROOME Year of Service *: 2011

Show form in CHOICES Portal? No Yes

ISP Review

Was an ISP Review conducted this month? Yes Date of ISP Review: 4/25/2011

Was the Individual Present at Review? Yes Service Coordinator's Electronic Signature: train128 train128 on 04/27/2011

Service Coordination Agreement (SCA) Review

Was the SCA reviewed this month? Yes Date of SCA Review: 4/25/2011

Service Coordinator's Electronic Signature: train134 train134 on 04/27/2011

Status: Active

Trusted sites | Protected Mode: Off 100%

ICF/MR Level of Care Eligibility Determination (LCED) (This section is optional)

By completing the Month of Service and Year of Service drop down boxes, this enables, “Was LCED completed this month.”

Selecting “Yes” for “Was a LCED completed this month, enables “Date of LCED Completed.”

“Date of LCED Review” must be the same as the Month and Year of Service selected in the form in the header.

The LCED section has been completed, signed and locked.

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0

Save and Close View PDF Help

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Information

Details: Information Activities History Supporting Documents Face-to-Face Contacts Referral/Linkage, Be...

General Monthly Summary

Was the Individual Present at Review? Yes Service Coordinator's Electronic Signature train128 train128 on 04/27/2011

Service Coordination Agreement (SCA) Review

Was the SCA reviewed this month? Yes Date of SCA Review 4/25/2011

Service Coordinator's Electronic Signature train134 train134 on 04/27/2011

ICF/MR Level of Care Eligibility Determination (LCED)

Was the LCED completed this month? Yes Date LCED Completed 4/25/2011

Service Coordinator's Electronic Signature train128 train128 on 04/27/2011

Status: Active

Trusted sites | Protected Mode: Off 100%

Supporting Documents

Within the MSC10 Main Screen for Alda Balowitz, the left hand section entitled, Details, contains a link to Supporting Documents

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0

Save and Close Submit Form View PDF Help

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Information

Details:

- Information
- Activities
- History
- Supporting Documents
- Face-to-Face Contacts
- Referral/Link

View Supporting Documents

General Monthly Summary

Individual: BALOWITZ,ALDA

Agency Name: 0233 - BROOME

Month of Service: April

Year of Service: 2011

Form in CHOICES Portal? No Yes

ISP Review

Was an ISP Review conducted this month? Yes

Date of ISP Review: 4/25/2011

Was the Individual Present at Review? Yes

Service Coordinator's Electronic Signature: train128 train128 on 04/27/2011

Service Coordination Agreement (SCA) Review

Was the SCA reviewed this month? Yes

Date of SCA Review: 4/25/2011

Service Coordinator's Electronic Signature: train134 train134 on 04/27/2011

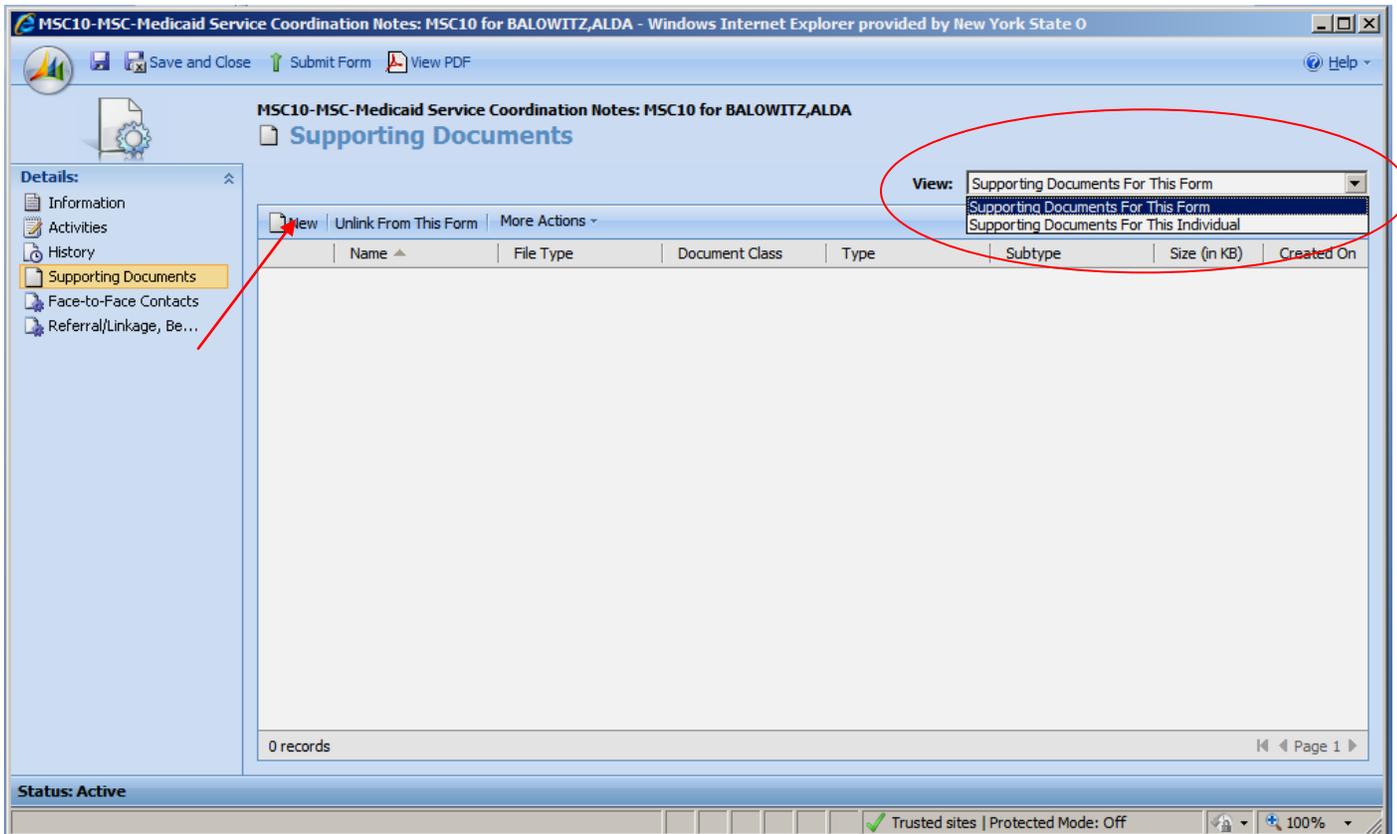
Status: Active

There are two views within this screen:

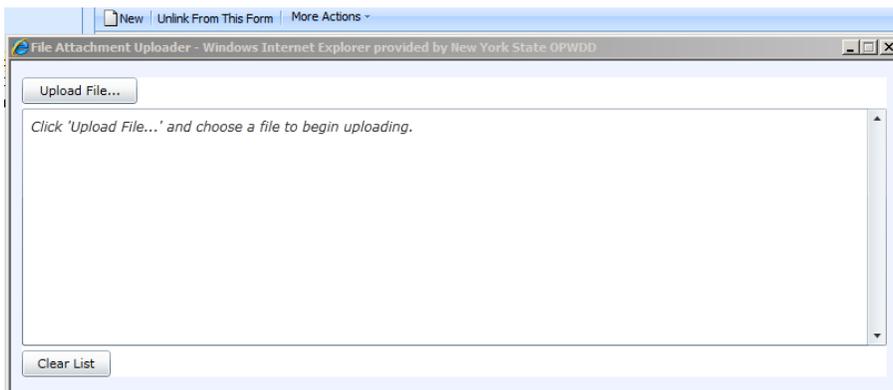
1. Support Documents For This Form; or
2. Supporting Documents For This Individual.

Supporting documents uploaded through the MSC-10 can be viewed in both views. Supporting documentation that is uploaded to the Individual will not appear in the MSC-10 view entitled Supporting Document For This Form.

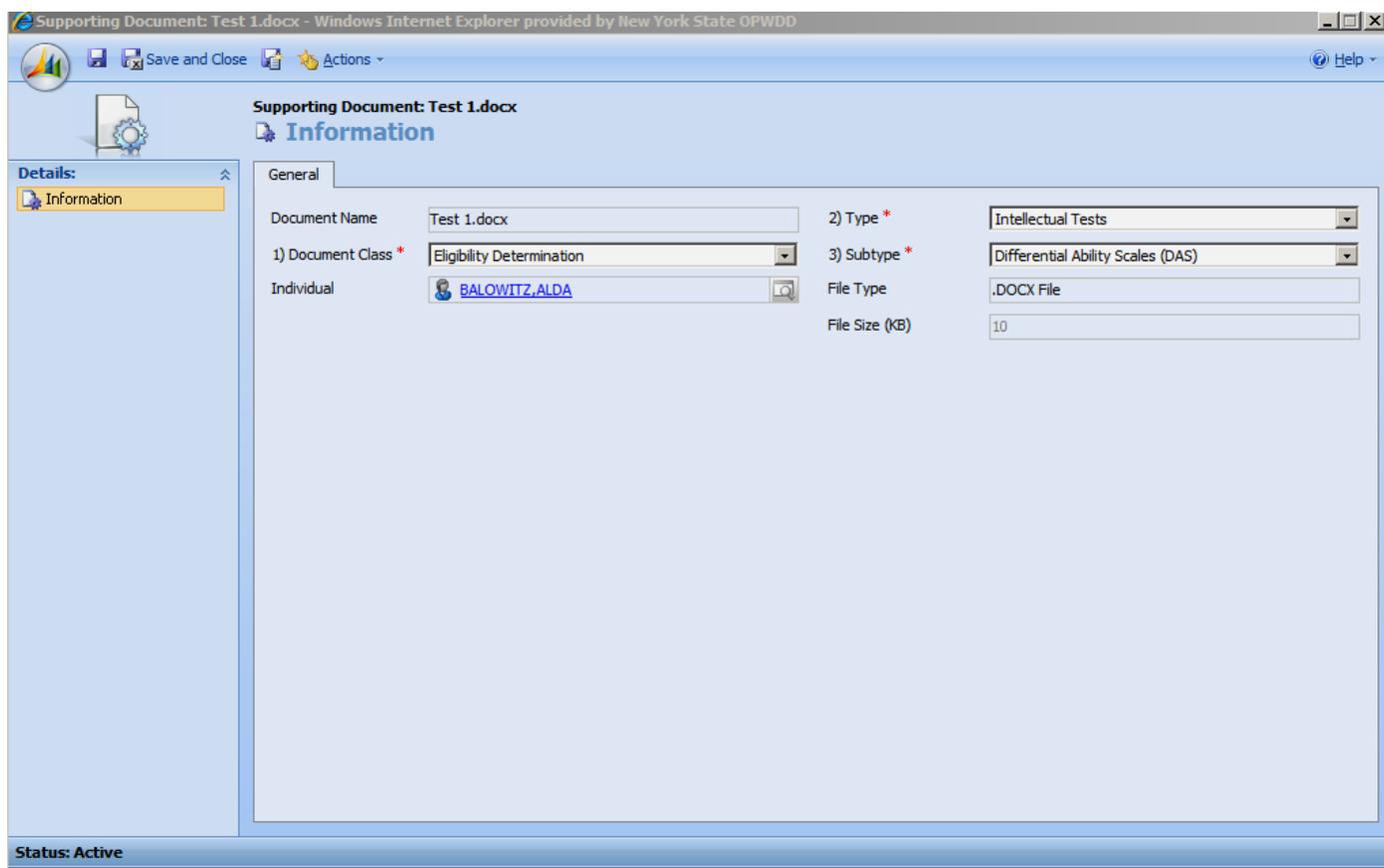
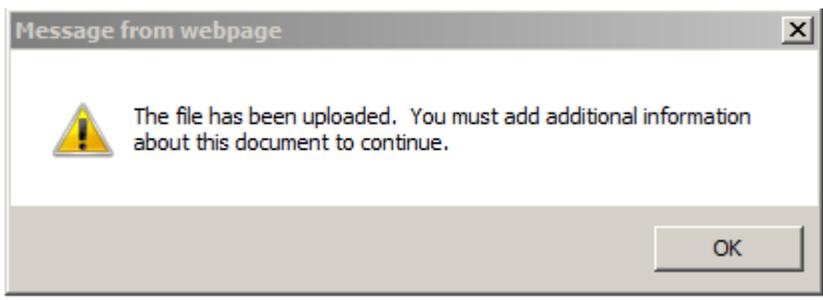
For more information on Supporting Documents please check the Step by Step material on the CHOICES training page.



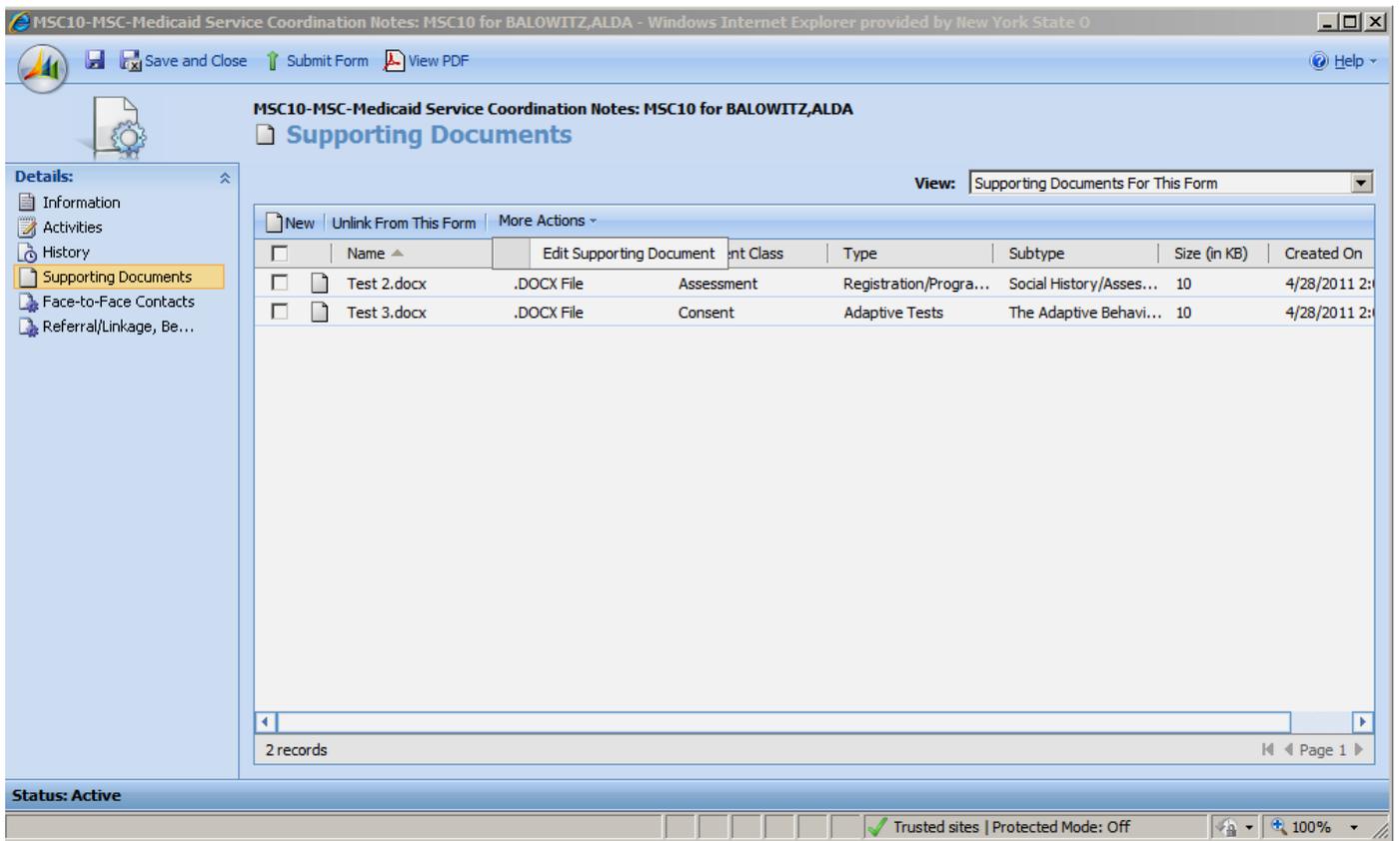
Click on "New" to upload the file.



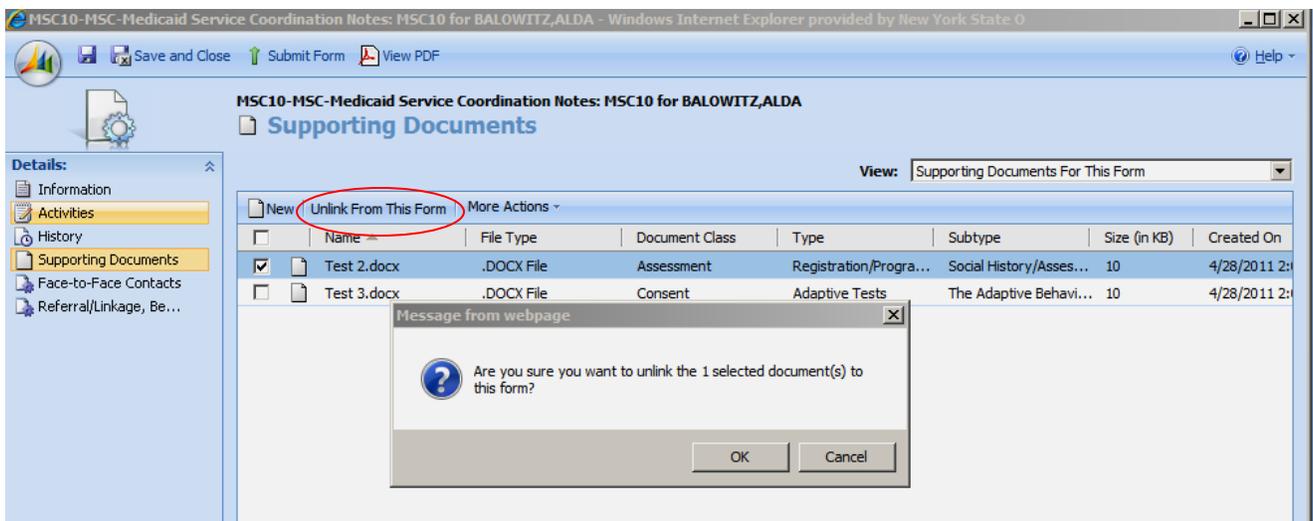
After the file is uploaded, the Service Coordinator will be prompted to input additional information about the file attachment such as Document Class, Type, and Sub type.



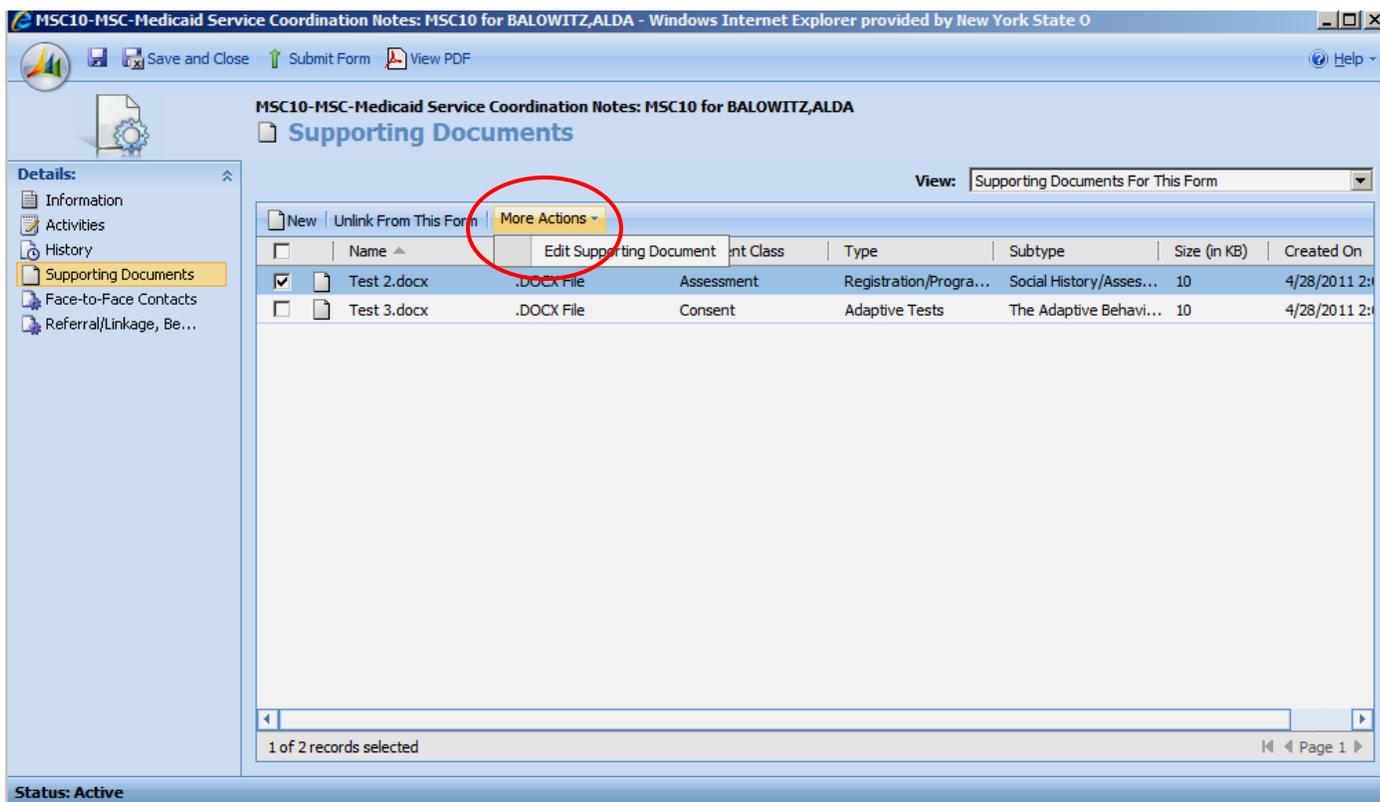
Service Coordinator clicks Save and Close. The MSC10-Supporting Document Screen appears.



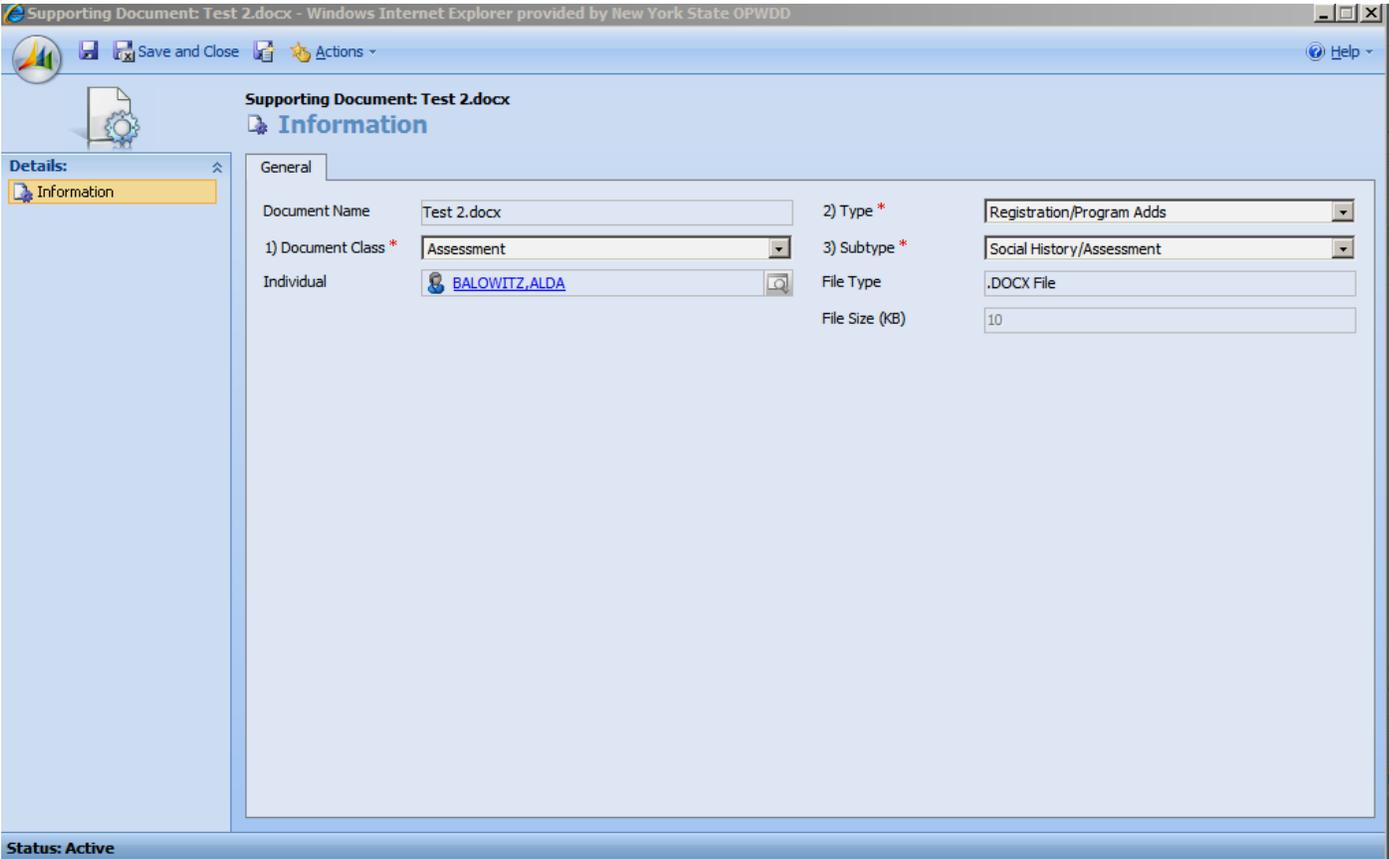
The Service Coordinator can remove files by selecting the appropriate file and then click, "Unlink From This Form."



The Service Coordinator can edit descriptive information about the attachment by selecting the appropriate file and then highlighting, "More Actions" and Click, "Edit Supporting Documents."



The Service Coordinator may update the field names that have a red asterisk.



The Service Coordinator clicks "Save and Close," to return to the Main MSC-10 screen.

Face-to-Face Contacts

Within the MSC10 Main Screen for Alda Balowitz, the left hand section entitled, Details, contains a link to Face-to-Face Contacts.

The screenshot displays the MSC10 web application interface. The browser title bar reads "MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0". The main content area is titled "MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA" and "Face-to-Face Contacts". A toolbar includes a "New Face-to-Face Contacts" button, which is circled in red. Below the toolbar is a table with the following data:

Date of Contact	Purpose and Outcome of Contact	Location of Service Meeting	Created By	Created On	Modified By	
4/26/2011	To establish quarterly lunch meetings disc...	Panera's Bread	train128 train128	4/27/2011	SYSTEM	4/2
4/26/2011	To schedule weekly brunch to discuss stat...	Dunkin Donuts	train128 train128	4/27/2011	train134 train134	4/2
4/26/2011	To establish monthly meetings to have bre...	The Desmond	train128 train128	4/27/2011	SYSTEM	4/2

The left-hand "Details" menu is visible, with "Face-to-Face Contacts" highlighted. A red arrow points from this menu item to the "New Face-to-Face Contacts" button. The status bar at the bottom indicates "Status: Active" and "Trusted sites | Protected Mode: Off".

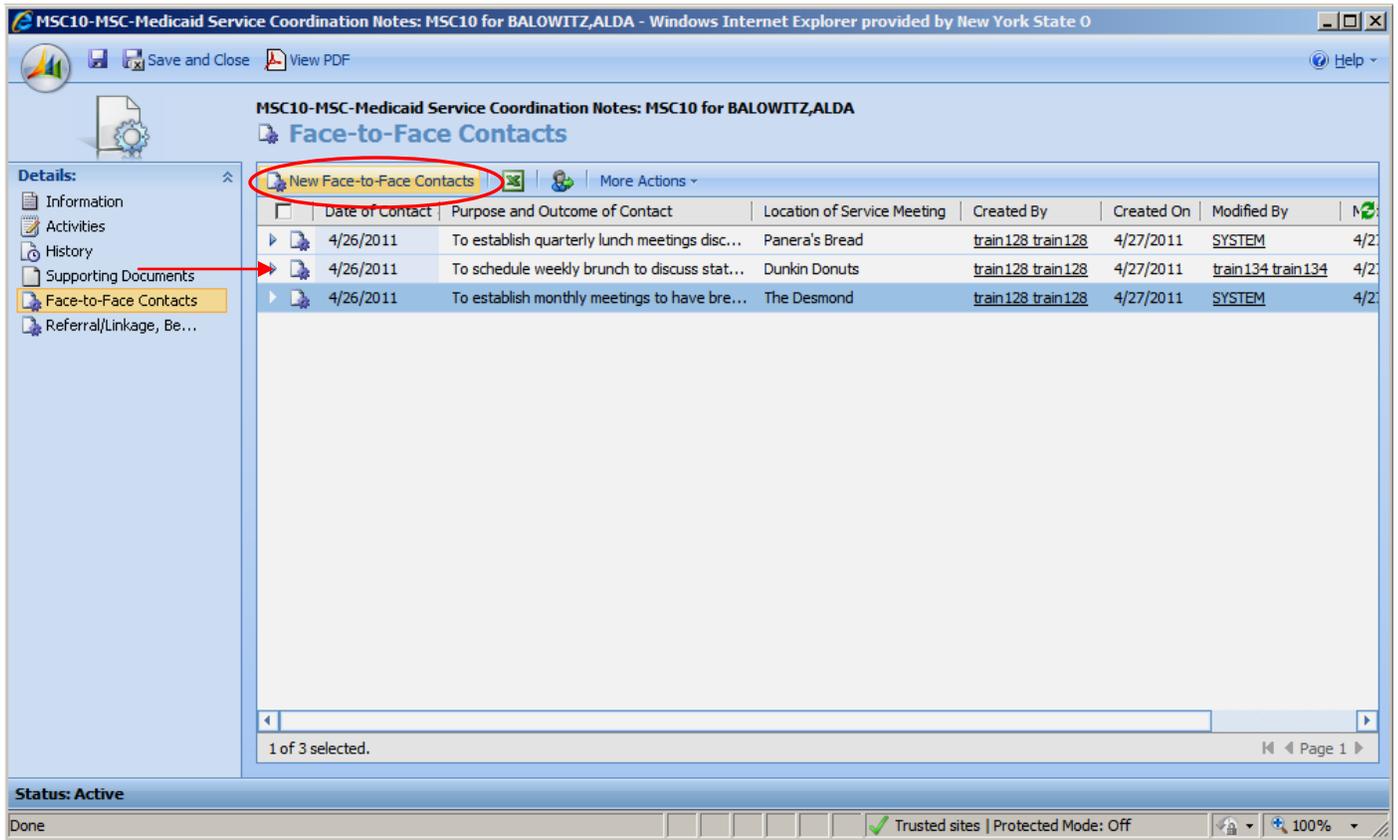
Created By and On contains info about the user who first created the record.
 Modified By and On only contains info about the last user who modified the record.

The screenshot shows a web browser window with the title "MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA". The page content includes a sidebar with a "Details" menu where "Face-to-Face Contacts" is selected. The main area displays a table with the following data:

Purpose and Outcome of Contact	Location of Service Meeting	Created By	Created On	Modified By	Modified On	Status	Reason
To establish quarterly lunch meetings disc...	Panera's Bread	train128 train128	4/27/2011	SYSTEM	4/27/2011	Inactive	
To schedule weekly brunch to discuss stat...	Dunkin Donuts	train128 train128	4/27/2011	train134 train134	4/27/2011	Active	
To establish monthly meetings to have bre...	The Desmond	train128 train128	4/27/2011	SYSTEM	4/27/2011	Inactive	

At the bottom of the interface, there is a status bar showing "Status: Active" and a browser status bar with "Trusted sites | Protected Mode: Off" and a zoom level of "100%".

User can click “New Face-to-Face Contact” to enter another contact in this list or double click on the item to see its details.



To see the details of a Face-to-Face Contact listed above, double-click on the row.

This Contact has the form status of “Saved”. Note that “Sign Face-to-Face Contact” is visible. A Face-to-Face Contact can be saved with data missing.

The screenshot shows a web browser window titled "Face-to-Face Contacts: Face-to-Face Contact for BALOWITZ, ALDA". The interface includes a "Details" sidebar with "Information", "Activities", and "History" options. The main content area is titled "Information" and contains a "General" tab with the following fields:

- MSC ID:** MSC10 for BALOWITZ,ALDA
- Date of Contact +:** 4/26/2011
- Purpose and Outcome of Contact +:** To schedule weekly brunch to discuss status of health and schedule other meetings.
- Location of Service Meeting +:** Dunkin Donuts
- Service Coordinator's Electronic Signature:** (Empty field)

A "Sign Face-to-Face Contact" button is located below the signature field. The status bar at the bottom indicates "Status: Active" and "Trusted sites | Protected Mode: Off".

All fields will be checked for “Recommended” (+) must be completed before the Service Coordinator can sign the Face-to-Face Contact. Click save and close.

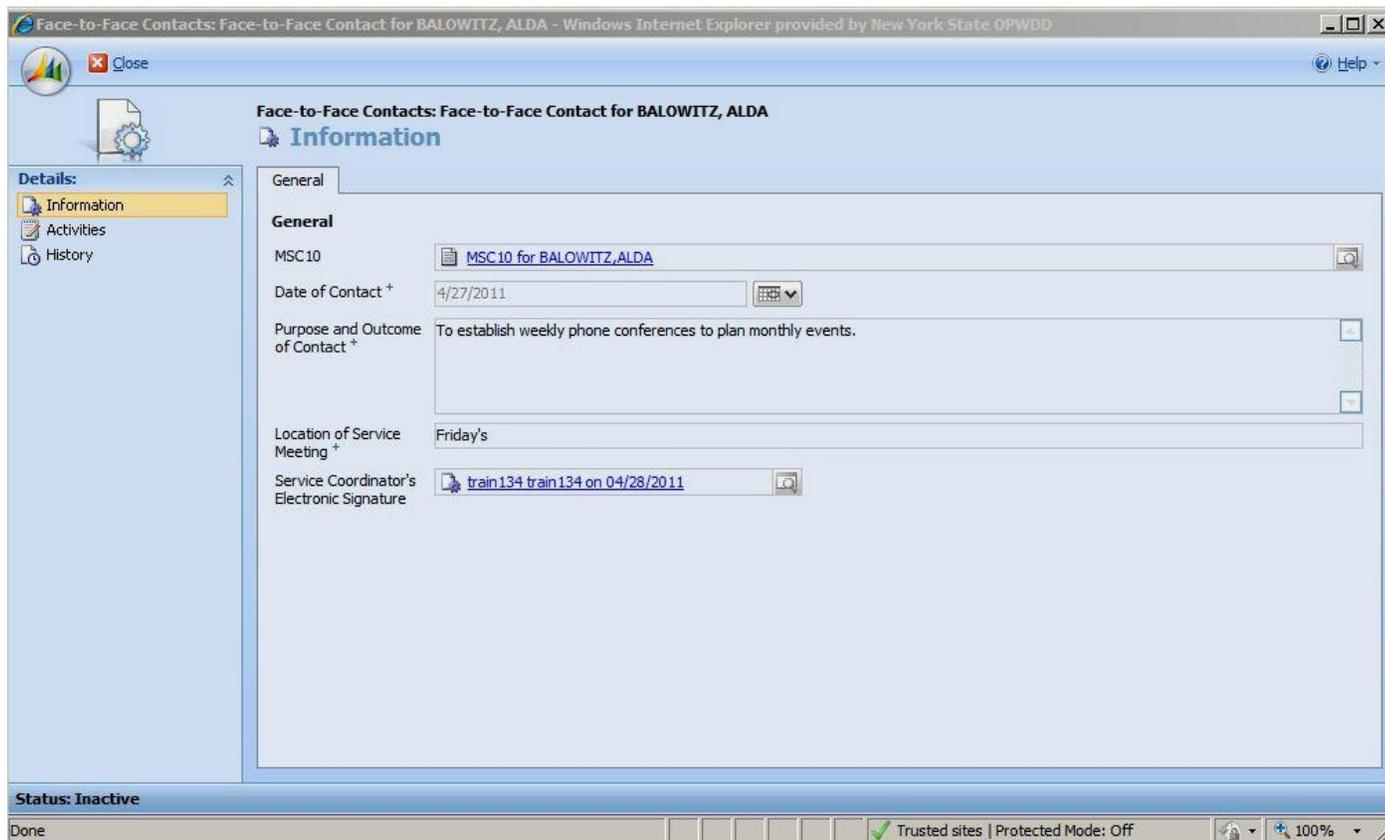
Service Coordinator selects last Face-to-Face contact from the list below which was created by one Service Coordinator and modified and saved by another Service Coordinator.

The screenshot shows a web browser window with the title "MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA". The page displays a table of "Face-to-Face Contacts". A red arrow points to the last row of the table, which is highlighted in blue. The table has the following data:

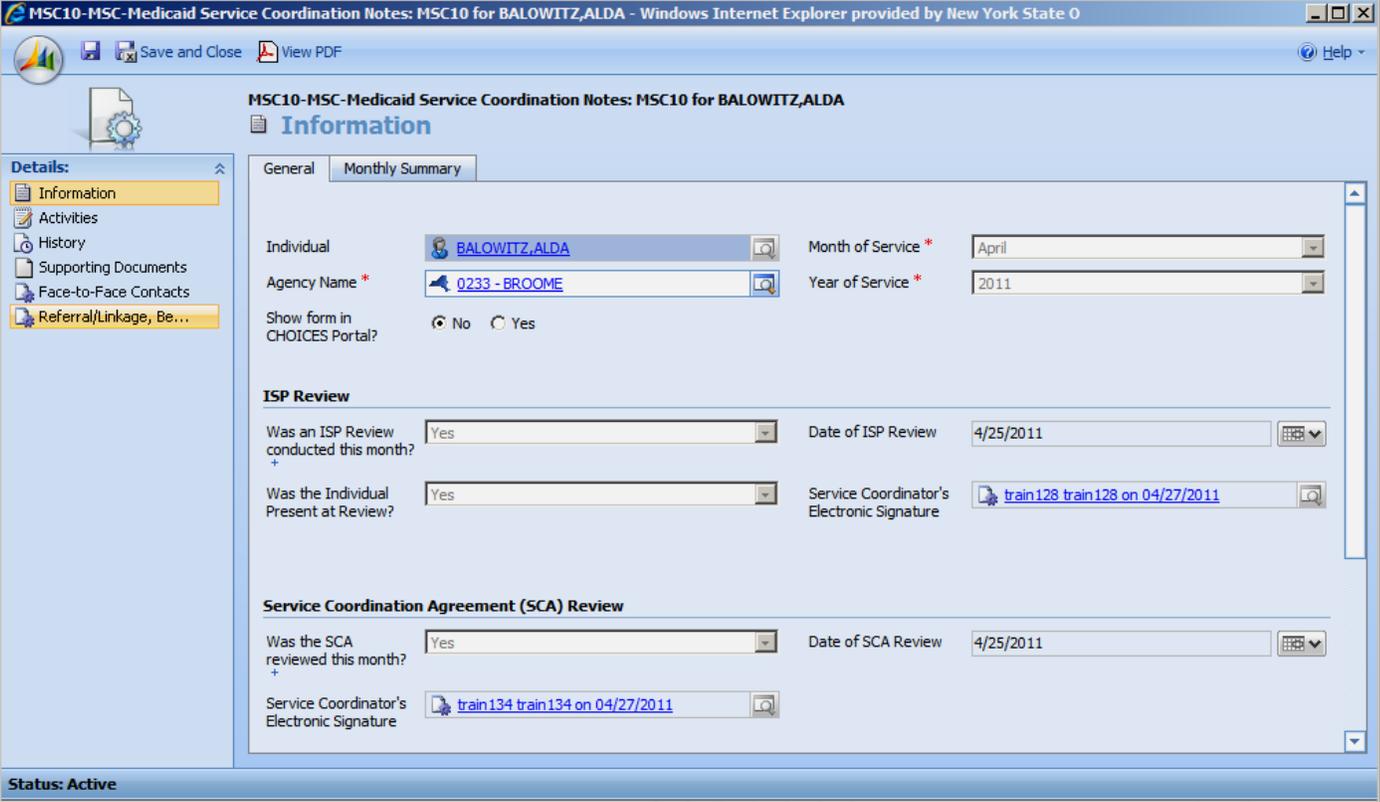
Date of Contact	Purpose and Outcome of Contact	Location of Service Meeting	Created By	Created On	Modified By	
4/26/2011	To establish quarterly lunch meetings disc...	Panera's Bread	train128 train128	4/27/2011	SYSTEM	4/2...
4/26/2011	To schedule weekly brunch to discuss stat...	Dunkin Donuts	train128 train128	4/27/2011	train128 train128	4/28...
4/26/2011	To establish monthly meetings to have bre...	The Desmond	train128 train128	4/27/2011	SYSTEM	4/2...
4/27/2011	To establish weekly phone conferences to ...	Friday's	train128 train128	4/28/2011	SYSTEM	4/28...

The status bar at the bottom of the browser window shows "Status: Active" and "Trusted sites | Protected Mode: Off".

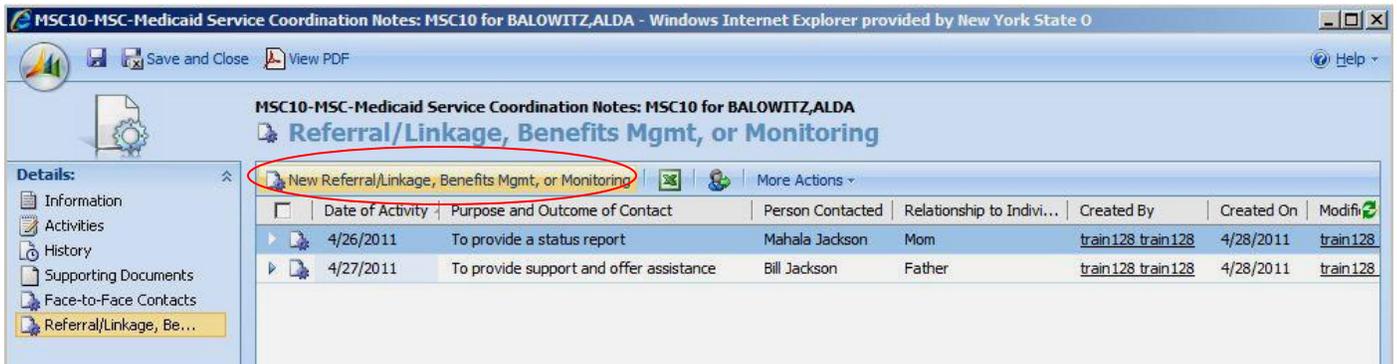
The Service Coordinator that opened the Face-to-Face contact and signed it is different than the Service Coordinator that created the Face-to-Face contact. Note that "Sign Face-to-Face Contact" is not visible because this contact form has been signed.



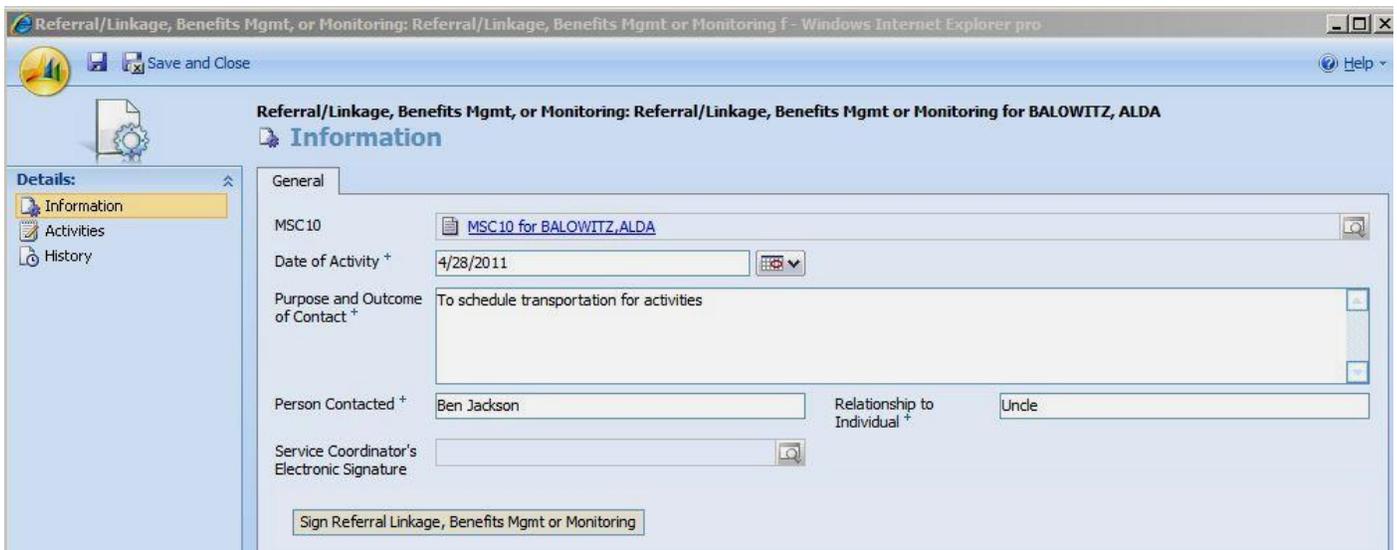
Within the MSC10 Main Screen for Alda Balowitz, the left hand section entitled, Details, contains a link to Referral/Linkage, Benefits or Management or Monitoring Link.



Click “Referral/Linkage, Benefits Management, or Monitoring” Link

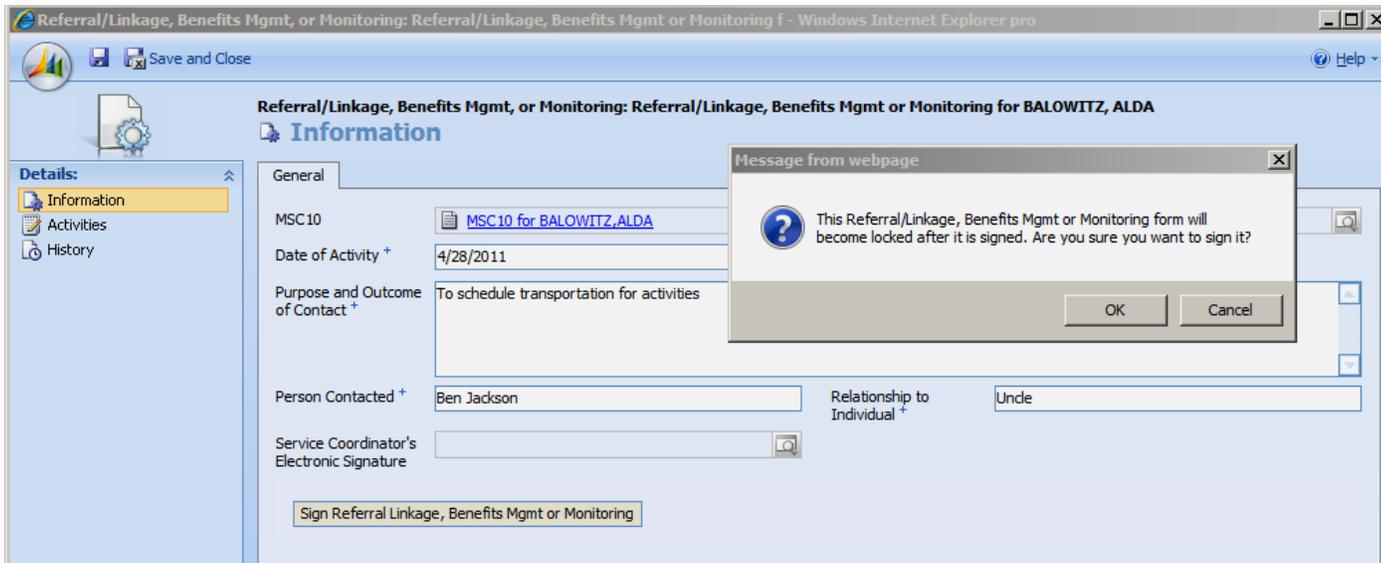


Click “New Referral/Linkage, Benefits Management, or Monitoring” Link. Enter data into all Recommended (required before Service Coordinator can e-sign) fields.

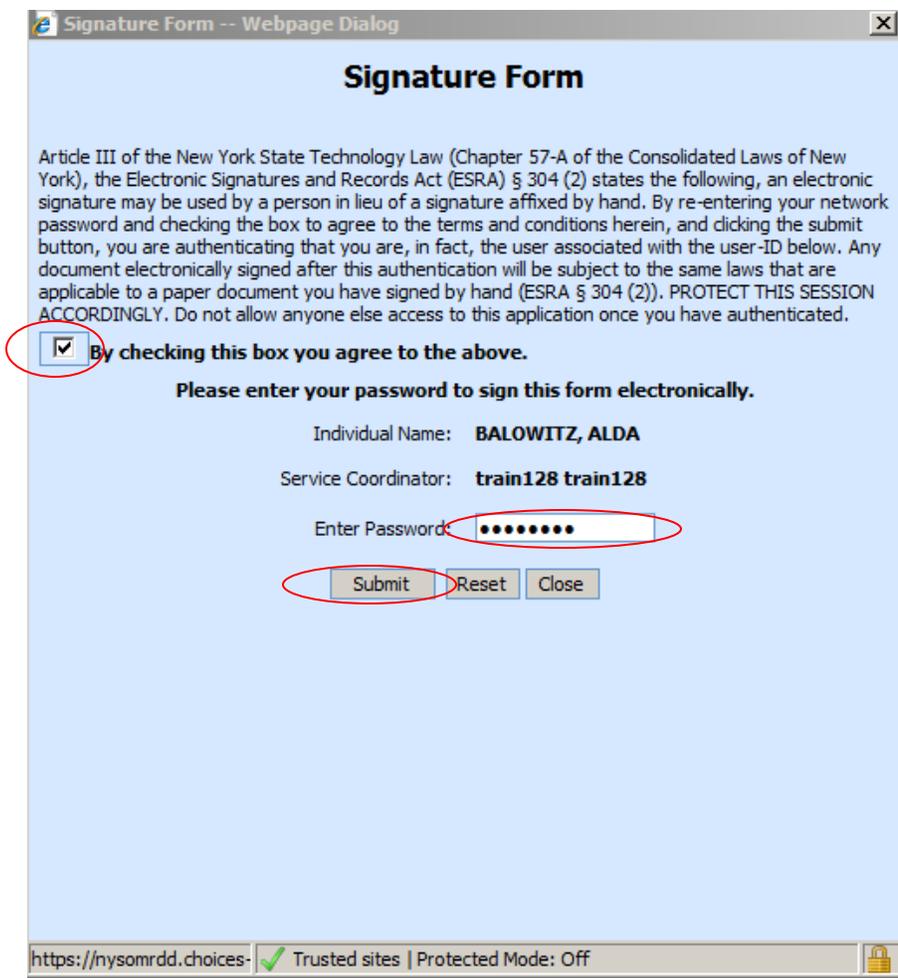


The Service Coordinator clicks on “Sign Referral Linkage, Benefits Management, or Monitoring” to e-sign the form.

Warning message that this activity will become locked after e-signing.



E-signature form appears after user clicked OK in the warning box above.



The Referral/Linkage, Benefits Management, or Monitoring page appears. Click Information to return to the Main MSC10 screen.

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Referral/Linkage, Benefits Mgmt, or Monitoring

Details:

- Information
- Activities
- History
- Supporting Documents
- Face-to-Face Contacts
- Referral/Linkage, Be...

Date of Activity	Purpose and Outcome of Contact	Person Contacted	Relationship to Individual	Created By	Created On	Modified
4/28/2011	To provide a status report	Mahala Jackson	Mom	train128 train128	4/28/2011	train128
4/27/2011	To provide support and offer assistance	Bill Jackson	Father	train128 train128	4/28/2011	train128
4/28/2011	To schedule transportation for activities	Ben Jackson	Unde	train128 train128	4/28/2011	SYSTEM

1 of 3 selected.

Status: Active

https://nysomrdd.choices-uat.omr.state.ny.us/userdefined/edit.aspx?id={536A3066-DC70-E011-4...} Trusted sites | Protected Mode: Off 100%

The MSC10 form appears. Click the Monthly Summary.

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0

Save and Close View PDF Help

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Information

General Monthly Summary

Individual: BALOWITZ,ALDA
Agency Name *: 0233 - BROOME
Month of Service *: April
Year of Service *: 2011
Show form in CHOICES Portal? No Yes

ISP Review

Was an ISP Review conducted this month? Yes
Date of ISP Review: 4/25/2011
Was the Individual Present at Review? Yes
Service Coordinator's Electronic Signature: train128 train128 on 04/27/2011

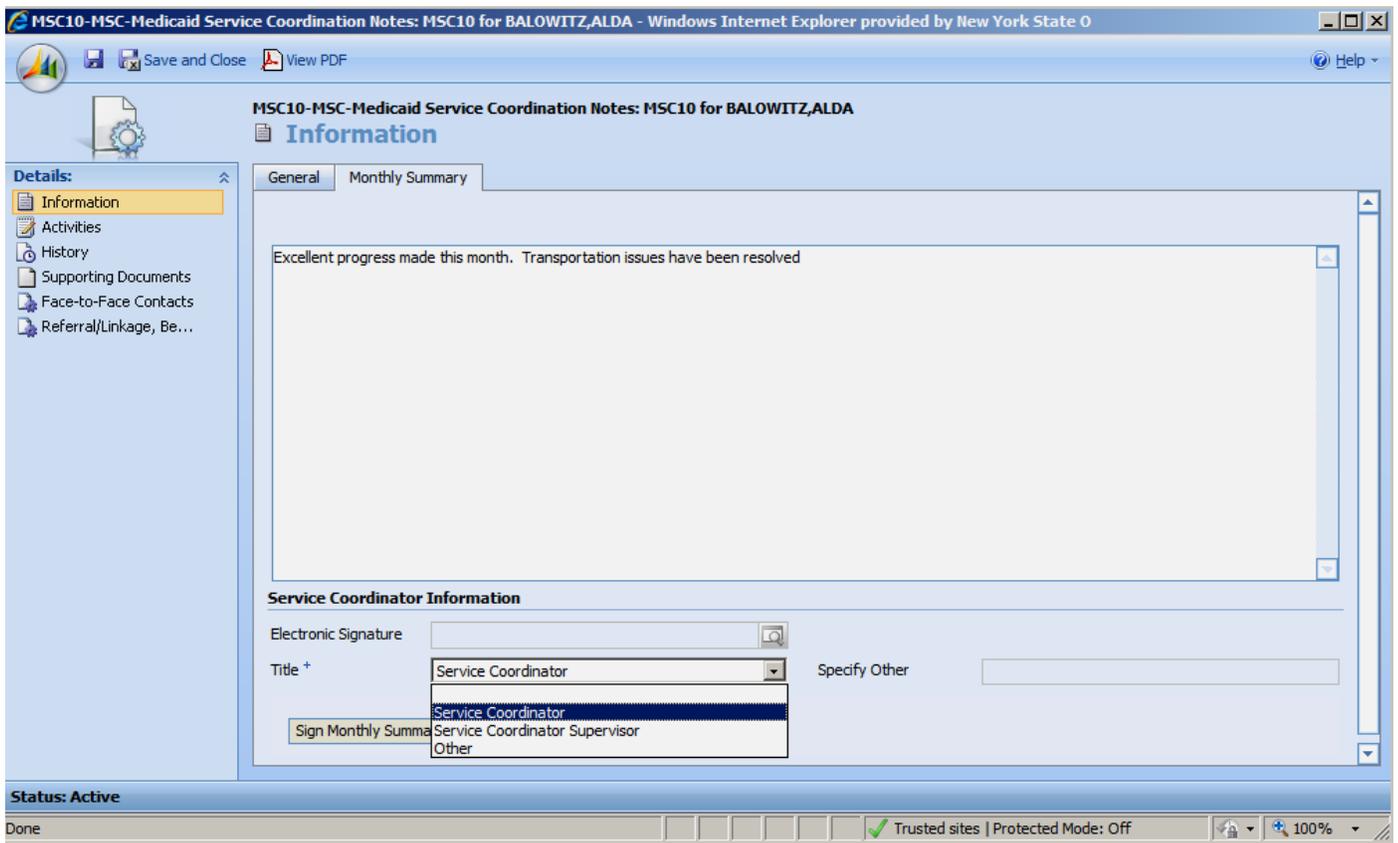
Service Coordination Agreement (SCA) Review

Was the SCA reviewed this month? Yes
Date of SCA Review: 4/25/2011
Service Coordinator's Electronic Signature: train134 train134 on 04/27/2011

Status: Active

javascript:onclick(); Trusted sites | Protected Mode: Off 100%

The Service Coordinator completes the Monthly Summary Section. It is expected that this section will have minimum entry, but if not completed by the 15th of the following month, the form locks and becomes inactive.



Saving, Printing and Submitting the MSC10

The MSC10 form can be saved



Saves the MSC10 – Gives it a Saved Status and remains open for the Service Coordinator to work on.

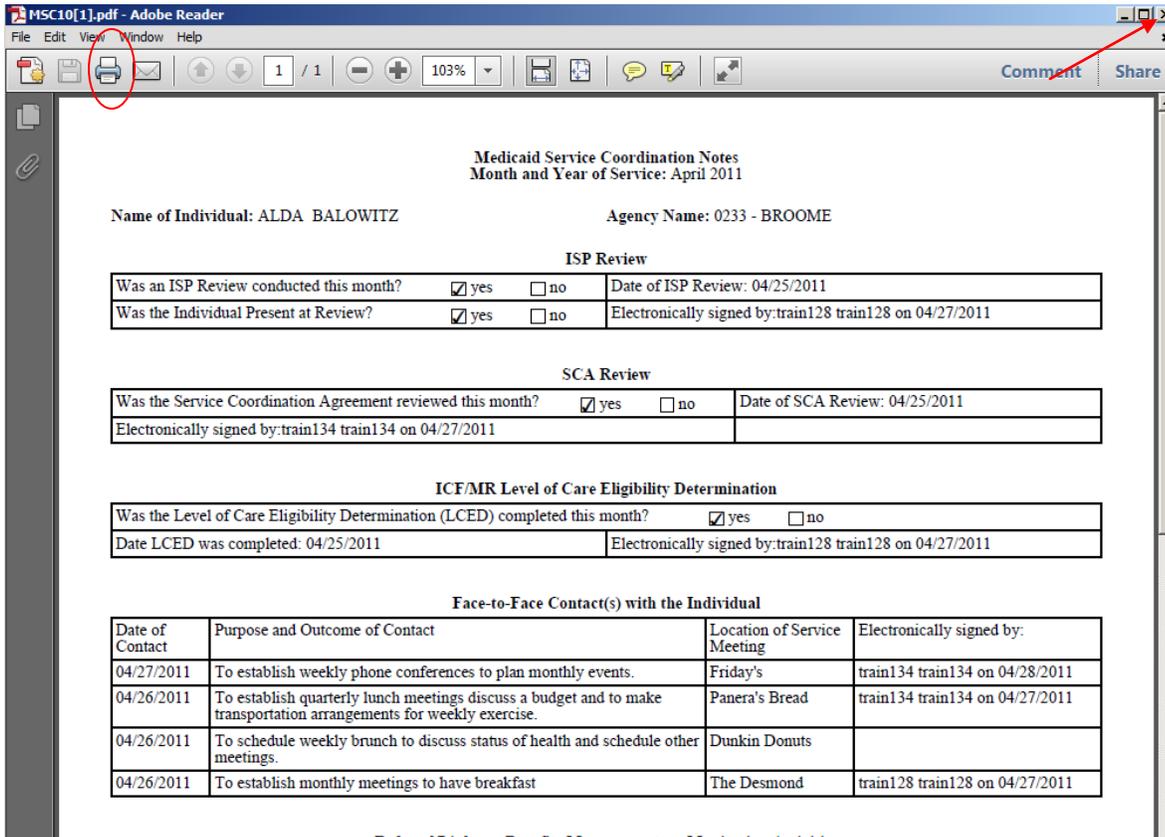


Save and Close Saves the MSC10 and closes the form

View PDF

1. **View PDF:** click on “View PDF” to open and review the form





To Print the form do so from the PDF.

Using the PDF toolbar at the top of the page click on the print icon.

To close the PDF, click 'X' in the top right-hand corner:

There is NO **Copy** function available on the MSC10.

SUBMITTING the Form

Once the MSC10 is completed and all required fields have been entered and any other section that has input has been signed, the MSC10 form can be signed

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0

Save and Close View PDF Help

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Information

Details:

- Information
- Activities
- History
- Supporting Documents
- Face-to-Face Contacts
- Referral/Linkage, Be...

General Monthly Summary

Excellent progress made this month. Transportation issues have been resolved

Service Coordinator Information

Electronic Signature

Title + Service Coordinator Specify Other

Sign Monthly Summary Service Coordinator Service Coordinator Supervisor Other

Status: Active

Done Trusted sites | Protected Mode: Off 100%

Service Coordinator clicks “Sign Monthly Summary.”

TIP: If you are missing any required fields, an error message will display informing you of what you should do.

Signature Form screen displays.

Please read the informational paragraph then click the box noting – “By checking this box...” (this process is the same for all forms).

The screenshot shows a web browser window titled "Signature Form -- Webpage Dialog". The main heading is "Signature Form". Below the heading is a paragraph of legal text regarding the Electronic Signatures and Records Act (ESRA) § 304 (2). A checkbox is present, followed by the text "By checking this box you agree to the above." Below this is the instruction "Please enter your password to sign this form electronically." The form fields include "Individual Name: BALOWITZ,ALDA", "Service Coordinator: train128 train128", and "Enter Password:" with an empty input field. At the bottom are three buttons: "Submit", "Reset", and "Close". The browser's address bar shows "https://nysomrdd.choices" and the status bar indicates "Trusted sites | Protected Mode: Off".

Signature Form

Article III of the New York State Technology Law (Chapter 57-A of the Consolidated Laws of New York), the Electronic Signatures and Records Act (ESRA) § 304 (2) states the following, an electronic signature may be used by a person in lieu of a signature affixed by hand. By re-entering your network password and checking the box to agree to the terms and conditions herein, and clicking the submit button, you are authenticating that you are, in fact, the user associated with the user-ID below. Any document electronically signed after this authentication will be subject to the same laws that are applicable to a paper document you have signed by hand (ESRA § 304 (2)). PROTECT THIS SESSION ACCORDINGLY. Do not allow anyone else access to this application once you have authenticated.

By checking this box you agree to the above.

Please enter your password to sign this form electronically.

Individual Name: **BALOWITZ,ALDA**

Service Coordinator: **train128 train128**

Enter Password:

https://nysomrdd.choices | Trusted sites | Protected Mode: Off

After checking the check box, the Service Coordinator enters their password and clicks the submit button.

This form is now signed and ready to be submitted and processed by the Service Coordinator.

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA - Windows Internet Explorer provided by New York State 0

Save and Close Submit Form View PDF Help

MSC10-MSC-Medicaid Service Coordination Notes: MSC10 for BALOWITZ,ALDA

Information

Details: Information, Activities, History, Supporting Documents, Face-to-Face Contacts, Referral/Linkage, Be...

General Monthly Summary

Individual: BALOWITZ,ALDA; Agency Name: 0233 - BROOME; Month of Service: April; Year of Service: 2011; Show form in CHOICES Portal: No

ISP Review: Was an ISP Review conducted this month? Yes; Date of ISP Review: 4/25/2011; Was the Individual Present at Review? Yes; Service Coordinator's Electronic Signature: train128 train128 on 04/27/2011

Service Coordination Agreement (SCA) Review: Was the SCA reviewed this month? Yes; Date of SCA Review: 4/25/2011; Service Coordinator's Electronic Signature: train134 train134 on 04/27/2011

Status: Active

Done Trusted sites | Protected Mode: Off 100%

The Service Coordinator clicks on “Submit,” and the form changes from Active to Inactive and is available for viewing within the Inactive list.

MSC10-MSC-Medicaid Service Coordination Notes

Search for records View: Inactive MSC 10-MSC-Medicaid Service Coordination Notes

Name	Month of Service	Year of Service	Created By	Created On	Modified By	Modified On	Status Reason
MSC10 for ALLAHAM,THOAN	March	2011	train134 train134	4/20/2011	train134 train134	4/20/2011	Submitted
MSC10 for ALLAHAM,THOAN	April	2011	train134 train134	4/20/2011	train134 train134	4/21/2011	Submitted
MSC10 for ANBERS,NANDAI	April	2011	train161 train161	4/22/2011	train161 train161	4/22/2011	Submitted
MSC10 for BALOWITZ,ALDA	April	2011	train128 train128	4/27/2011	train128 train128	4/28/2011	Submitted

Sort the Information in any List

MSC10-MSC-Medicaid Service Coordination Notes

Search for records View: Active MSC 10-MSC-Medicaid Service Coordination Notes

New More Actions -

<input type="checkbox"/>	Name ▲	Month of Service	Year of Service	Created By	Created On	Modified By	Modified On	Status Reason
▶	MSC 10 for Adams, Mary	April	2011	train128 train128	4/22/2011	SYSTEM	4/22/2011	Active
▶	MSC 10 for AGAMIE, SUNJEEV	March	2011	train162 train162	4/22/2011	SYSTEM	4/22/2011	Active
▶	MSC 10 for BALOWITZ, ALDA	April	2011	train128 train128	4/27/2011	SYSTEM	4/28/2011	Active
▶	MSC 10 for JONES, JANE	March	2011	train128 train128	4/22/2011	train128 train128	4/22/2011	Active
▶	MSC 10 for JONESES, CAROL	April	2011	train128 train128	4/22/2011	SYSTEM	4/22/2011	Active

- Each list can be sorted by any column.
- To see the list alphabetically arranged, click on the “Name” button
- To sort the list according to the date forms were completed or created, click the “Created On” button.