

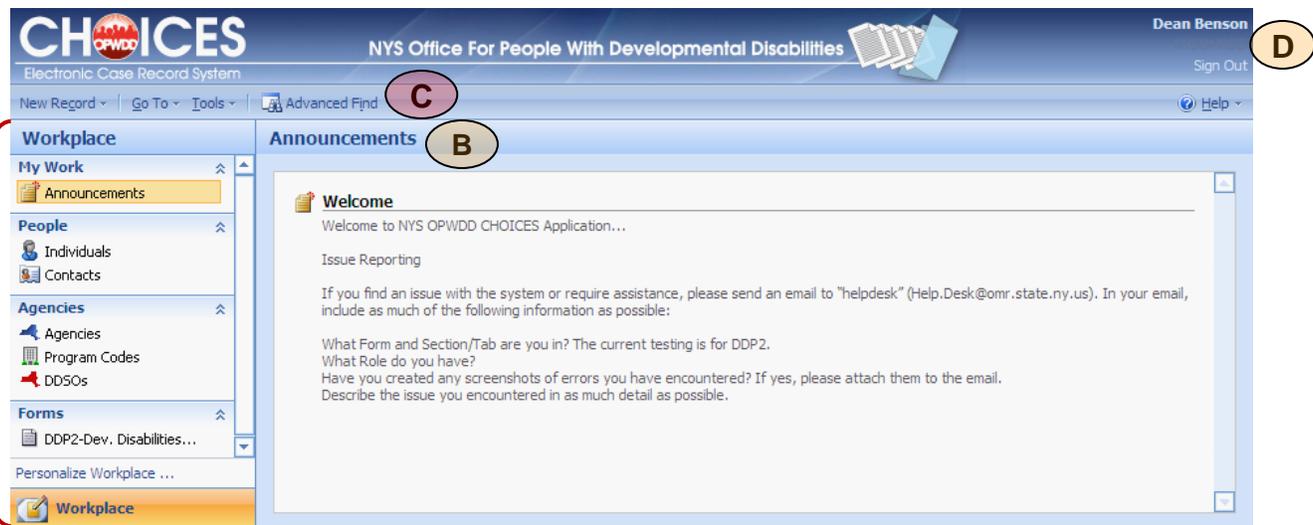
## MSC2 – CHNG – Consumer Request for Change

The **Change Form (MSC2)** is to be used by an Individual to request a change from one MSC vendor to another MSC vendor. The entry of this form in CHOICES is initially started by the new MSC vendor. This process requires input from the new MSC vendor and the DDSO MSC Coordinator.

- 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)
- Inside CHOICES there is NO delete function. If a mistake is made on a form before saving or submitting, just close and nothing is saved. But once a form is saved, it cannot be deleted.
- Depending on your role in the system some items may or may not be available to you.

Below is a graphic of the screen an end user will see upon logging into CHOICES.

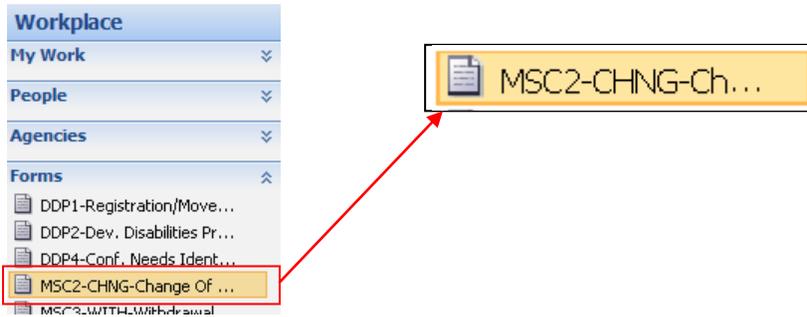
The default upon opening is to “Announcements,” which notes System messages, explains new features or give helpful information.



- A** The Workplace Menu or navigation column is how to move around inside the application.
- B** The content pane which displays whatever folder you have highlighted in the Workplace Menu.
- C** 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 MSC2 forms

1.) On the left side, under **Workplace**, is the **Forms** section which is the **central** filing location. Click on the MSC2 link to see the full list of MSC2 forms in progress or completed and their current status.



The content pane will display any completed or partially completed and saved MSC2 forms:

The image shows a screenshot of a web application interface for "MSC2-CHNG-Change Of MSC Vendor". At the top, there is a search bar and a "View:" dropdown menu set to "Active MSC2". Below the search bar are "New" and "More Actions" buttons. A table displays a list of records with the following columns: "Name", "Created On", and "Form Status". The table contains three rows of data:

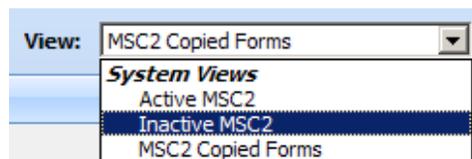
Name	Created On	Form Status
MSC2 for CREED,KADEN	11/9/2010	Saved
MSC2 for MASI,CARMILA N	11/10/2010	Saved
MSC2 for MASSOTH,KAGAN	11/18/2010	Submitted

Depending on the view, the different status of each MSC2 is displayed:

“**Saved**” means that the MSC2 has been saved but not submitted.

“**Submitted**” means that the MSC2 has been entered and submitted by the new MSC vendor requesting the change. However, the change has not yet been approved. The **View** above is set to **Active MSC2**.

If the view was changed to **Inactive MSC2** using the dropdown arrow, you would be able to view any MSC2 that was submitted and successfully entered into TABS.

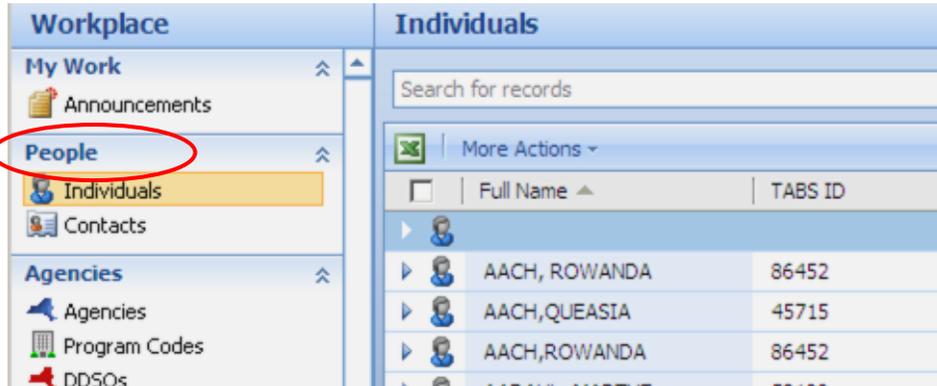


2.) All forms are also filed under the **Individual** for whom they were created.

3.) Any form that requires further processing after being created and submitted will also be copied to the appropriate **Queue** at the DDSO.

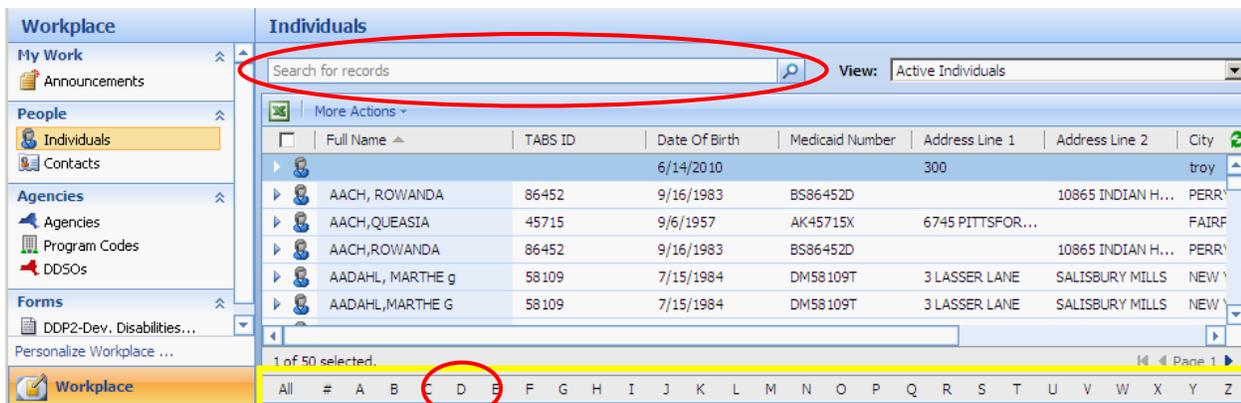
## Create a New MSC2 (Form)

To create a new MSC2, start in the **Workplace** section under **People**, click the “**Individuals**” link:



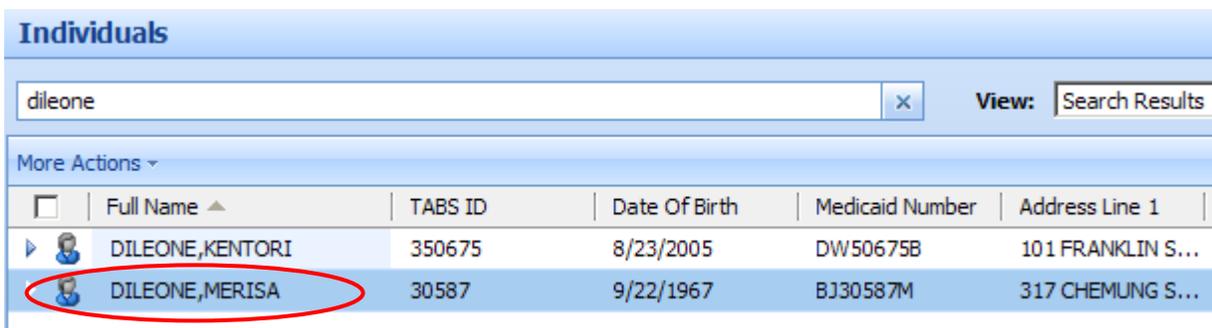
The Individuals section displays everyone that is known to TABS.

In the **Individuals** section, you can search by name, last name only, either in the area where it states **Search for records** or you can narrow the search down by clicking a letter at the bottom.



In this example, we want to pull up an Individual, Merisa Dileone. Enter her last name in the “Search for records” section; then click the **Start Search** icon . A list matching our search displays.

To start the MSC2, highlight and double-click her name, Merisa Dileone.



A screen appears with her information pulled directly from TABS.

To start a new MSC2, click the MSC2 link under **Details**.

Individual: DILEONE, MERISA  
**Information**

General Additional Information Notes

**Individual Information**

Last Name *	DILEONE	First Name *	MERISA
Middle Initial		Full Name	DILEONE, MERISA
Date Of Birth *	9/22/1967	Sex	Female
Ethnicity	White		
Phone Number	607-734-6135	Cell Phone Number	
Email			
Social Security Number	000-03-0587	Medicaid Number	BJ30587M

The MSC2 screen for Merisa Dileone appears.

Currently, there are no MSC2s for Merisa Dileone. To start a new MSC2 click the **New MSC2 – CHNG-Change Of MSC Vendor** link.

Individual: DILEONE, MERISA - Windows Internet Explorer provided by New York State OPWDD

Individual: DILEONE, MERISA  
**MSC2-CHNG-Change Of MSC Vendor**

New MSC2-CHNG-Change Of MSC Vendor Add Existing MSC2-CHNG-Change Of MSC Vendor

Name	Created On	Form Status
No MSC2-CHNG-Change Of MSC Vendor records are available in this view.		

This will open a new MSC2 for Merisa Dileone.

MSC2-CHNG-Change Of MSC Vendor: New  
Information

Details: Information, Activities, History, Supporting Documents

General Notes

**Section I. Individual Information:**

Individual: DILEONE, MERISA (DDS0)  
 Last Name: DILEONE First Name: MERISA  
 Middle Initial: TABS ID: 30587  
 Social Security Number: 000-03-0587 Medicaid Number: BJ30587M  
 Date Of Birth: 9/22/1967 Phone Number: 607-734-6135  
 Address Line 1: 317 CHEMUNG STREET Address Line 2:  
 City: WAVERLY State: NEW YORK  
 Zip: 14892

**Section II. Current MSC Vendor/DDS0 Information:**

Current Vendor/DDS0: Current TABS Program Code:

**Section III. New MSC Vendor:**

New Vendor/DDS0 \*: 0233 - BROOME New TABS Program Code \*:  
 Requested Effective Date Of Change \*: 12/1/2010  
 MSC Vendor/DDS0: Anthony Kesseling MSC Vendor / DDS0:

## Completing the MSC2

Beginning with Section III, either the new MSC Vendor or the DDSO, if the individual chooses to receive state delivered MSC, completes this section.

Fill in all **required** (\*) fields and any other information known. (**Required** is noted by asterisk.)

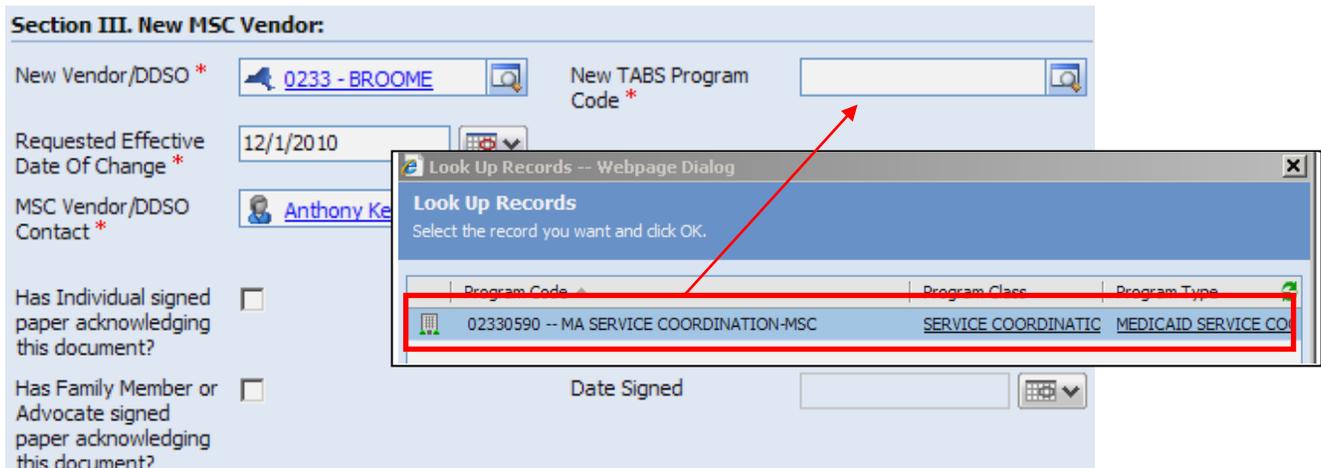
There is a **"Find" icon**  with each field that you may want assistance in selecting a choice.

The first required field is **"New TABS Program Code"** in which the individual will be enrolled. Choose the appropriate TABS Program Code by clicking on the **Find** icon.

**Section III. New MSC Vendor:**

New Vendor/DDS0 \*: 0233 - BROOME New TABS Program Code \*:  
 Requested Effective Date Of Change \*: 12/1/2010

When the **Find** icon  is clicked, a window pops up with eligible programs that can be selected. In this example there is only one program, double click or click **[OK]** to select the highlighted program.



**Section III. New MSC Vendor:**

New Vendor/DDSO \*   New TABS Program Code \*

Requested Effective Date Of Change \*  

MSC Vendor/DDSO Contact \*  

Has Individual signed paper acknowledging this document?

Has Family Member or Advocate signed paper acknowledging this document?

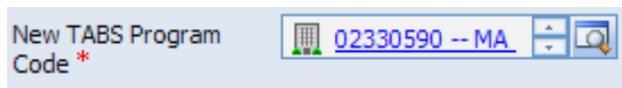
Date Signed  

**Look Up Records -- Webpage Dialog**

Look Up Records  
Select the record you want and click OK.

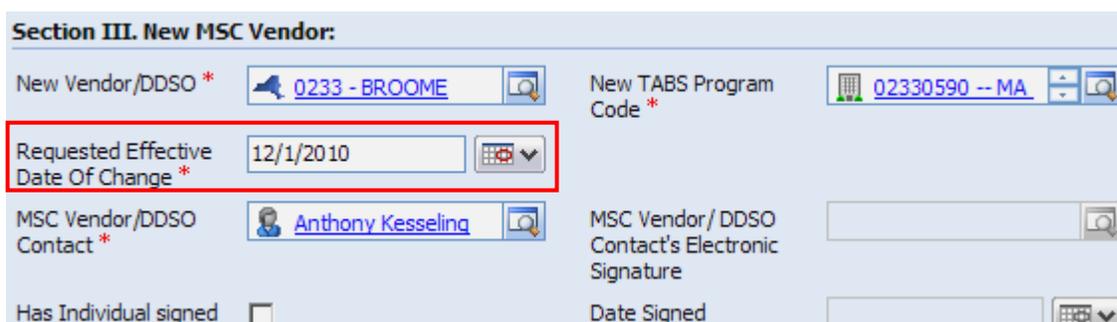
Program Code	Program Class	Program Type
02330590 -- MA SERVICE COORDINATION-MSC	SERVICE COORDINATIC	MEDICAID SERVICE CO

The program selected will be brought into the **New TABS Program Code** field.



New TABS Program Code \*  

**Note:** The **Requested Effective Date Of Change** is defaulted by the system to the first day of the month following the month in which a requested change is being made. In this case the entry that is being made for this individual on 11/20/2010; therefore the system defaults to 12/1/2010.



**Section III. New MSC Vendor:**

New Vendor/DDSO \*   New TABS Program Code \*  

Requested Effective Date Of Change \*  

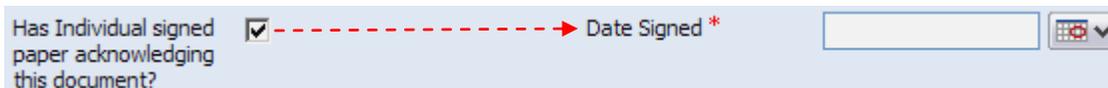
MSC Vendor/DDSO Contact \*  

MSC Vendor/ DDSO Contact's Electronic Signature

Has Individual signed  Date Signed  

Next we'll indicate via check boxes in Section III, whether or not an Individual or Family Member signed a paper acknowledging this document.

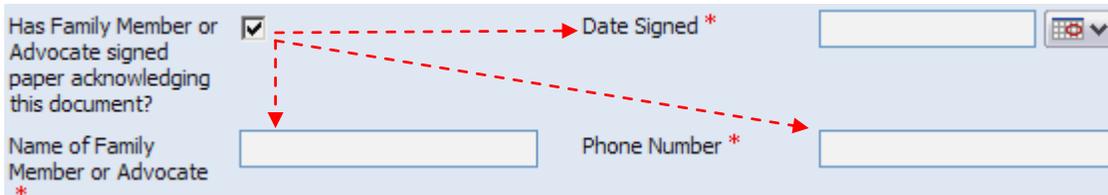
The first checkbox asks: **Has Individual signed paper acknowledging this document?**



Has Individual signed paper acknowledging this document?  → Date Signed \*  [Calendar icon]

If you check this box, another required field displays: **Date Signed**.

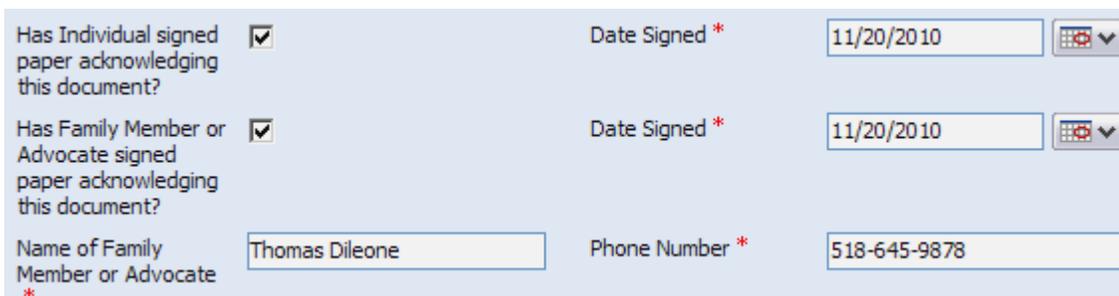
The second checkbox asks: **Has Family Member or Advocate signed paper acknowledging this document?**



Has Family Member or Advocate signed paper acknowledging this document?  → Date Signed \*  [Calendar icon]

Name of Family Member or Advocate \*  Phone Number \*

If you check this box, numerous required fields display: **Date Signed, Name of Family Member or Advocate, and Phone Number**. All fields must be entered.



Has Individual signed paper acknowledging this document?  Date Signed \* 11/20/2010 [Calendar icon]

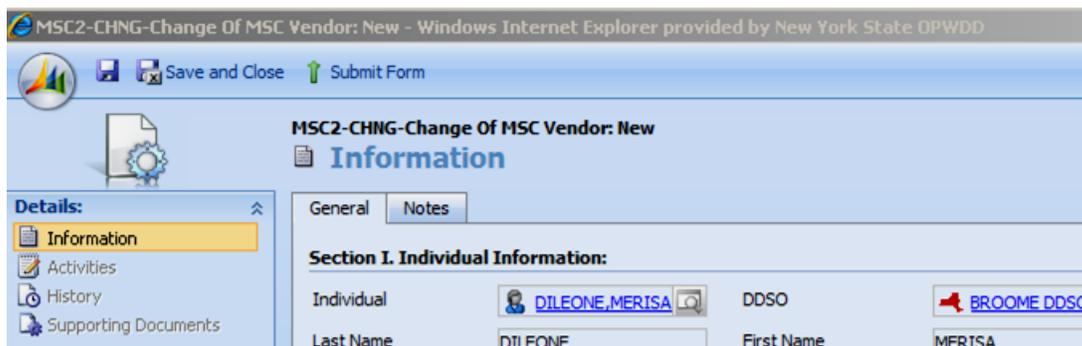
Has Family Member or Advocate signed paper acknowledging this document?  Date Signed \* 11/20/2010 [Calendar icon]

Name of Family Member or Advocate \* Thomas Dileone Phone Number \* 518-645-9878

## **Saving, Printing and Submitting the MSC2**

Once the form is completed and all required fields have been entered, the MSC2 form can either be **Saved** or **Submitted**.

In the top left-hand corner of the screen you will find a **Save, Save and Close** and **Submit** button.



MSC2-CHNG-Change Of MSC Vendor: New - Windows Internet Explorer provided by New York State OPWDD

Save and Close Submit Form

MSC2-CHNG-Change Of MSC Vendor: New  
Information

Details: Information, Activities, History, Supporting Documents

General Notes

Section I. Individual Information:

Individual: DILEONE, MERISA DDSO BROOME DDSO

Last Name: DILEONE First Name: MERISA

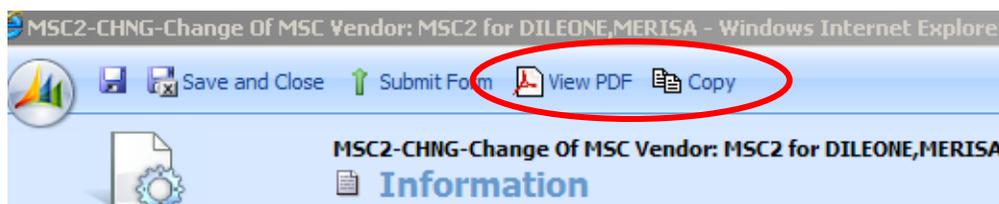
 Saves the MSC2 and remains open for you to continue work if necessary.

 Save and Close Saves the MSC2 and closes the form - gives it a Saved status.

 Submit Form Submits the MSC2 to be processed; gives the form a Submitted status.

## View and Copy

Once the MSC2 is saved two more buttons appear.



To **View the PDF** or to print:

Click on  View PDF and it will open on a PDF Version of the MSC2.

NEW YORK STATE OFFICE FOR PEOPLE WITH DEVELOPMENTAL DISABILITIES		MSC2 – CHNG (3/00)	
<b>INDIVIDUAL REQUEST FOR CHANGE OF MEDICAID SERVICE COORDINATION VENDOR</b>			
<b>Section I. Individual Information: To be completed by DDSO</b>			
Name: Last DILEONE	First MERISA	MI	TABS ID#: (if known) 30587
Address: Street 317 CHEMUNG STREET		Date of Birth: 0 9 / 2 2 / 1 9 6 7 MM / DD / YYYY	Social Security Number: X X X - X X - 0 5 8 7
City WAVERLY	State NY	Zip 14892	Phone Number: (607 ) 734-8135
DDSO: BROOME DDSO			
<b>Section II. Current MSC Vendor/DSO Information: To be completed by DDSO</b>			
Vendor/DSO Name:		Vendor Address: Street	
TABS Program Code: 		City	State Zip
<b>Section III. New MSC Vendor: To be completed by new MSC vendor or DDSO (for state delivered MSC)</b>			
Vendor/DSO Name: 0233 - BROOME		Vendor Address: Street 249 GLENWOOD ROAD	
TABS Program Code:   0   2   3   3   0   5   9   0		City BINGHAMTON	State Zip NEW YORK 13905
Requested Effective Date of Change: (Must be the first day of a month following the month in which the request is made.) 1 2 / 0 1 / 2 0 1 0 MM / DD / YYYY			
MSC Vendor or DDSO Staff Person: On File		Phone Number: (518 ) 381-2133	Date: _ / _ / _ MM / DD / YYYY
Individual's Signature: On File		Phone Number: (518 ) 645-9878	Date: 1 1 / 2 0 / 2 0 1 0 MM / DD / YYYY
Family Member or Advocate's Signature (if appropriate): On File		Phone Number: (518 ) 645-9878	Date: _ / _ / 2 0 2 0 1 0 MM / DD / YYYY
<b>Section IV. To be completed by DDSO MSC Coordinator</b>			

You can print the MSC2 from here using the pdf toolbar at the top of the page.

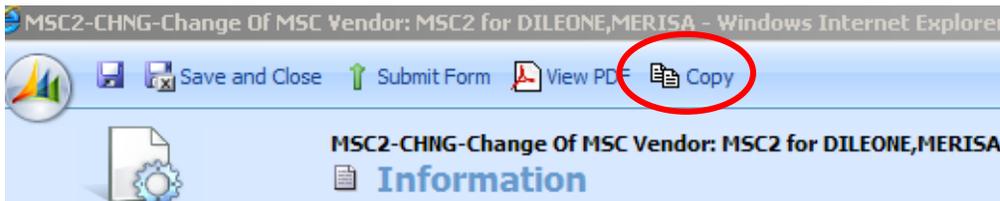


Click the 'X' in the top right-hand corner to close the PDF.



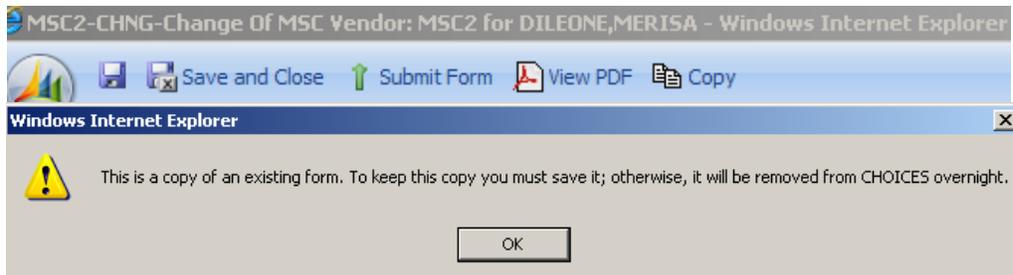
To **Copy** the MSC2

Click the **Copy**  button.



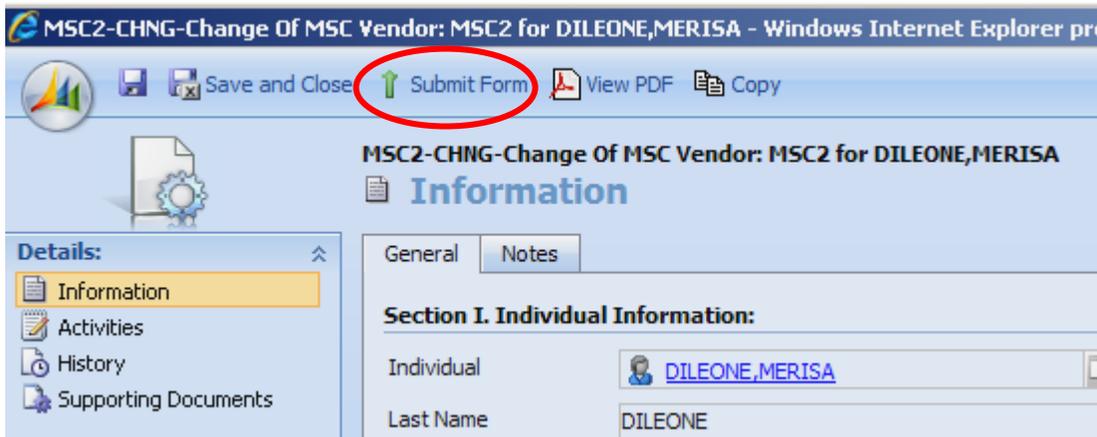
**NOTE:** The **Copy** button is used to create a new form based on one that has been saved so that you can edit necessary information without redoing the whole form.

A message is displayed reminding you to edit the form and be sure to "Save" it.



## Submit the MSC2

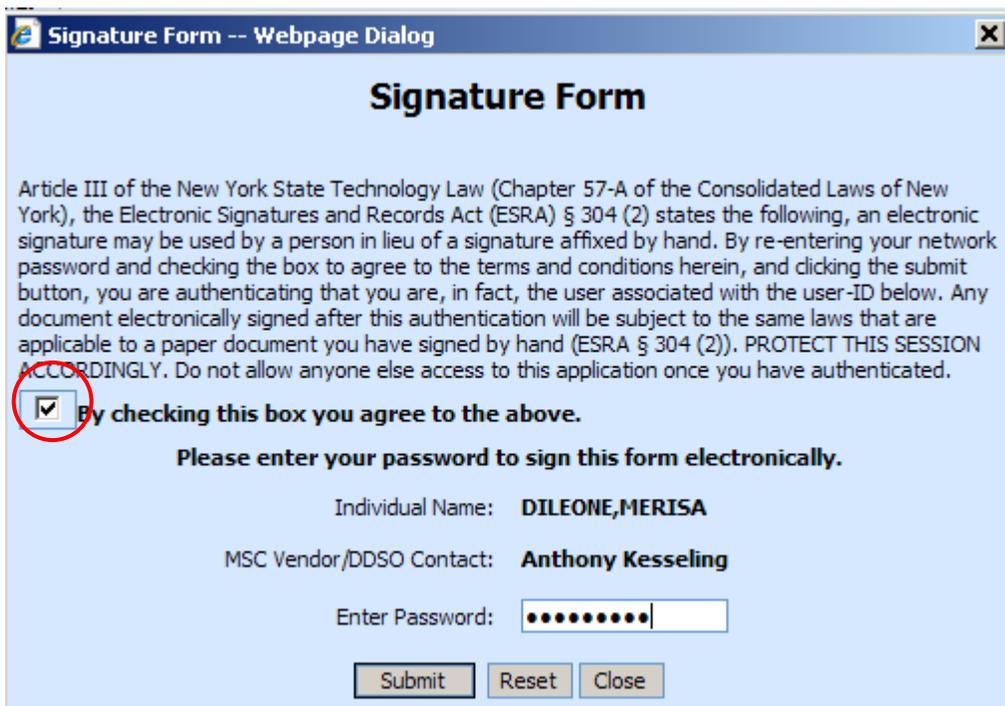
When the MSC2 is ready for submission, click the **Submit Form**  button.



An electronic signature box will display:

Please read the information, click the box noting – “**By checking this box...**”

Then enter your password and click Submit:



**NOTE:** Whenever you submit or process forms that require a signature you will automatically have this electronic signature box display. By clicking in the box before the statement and then putting in your password, you are attesting to signing the form.

**TIP:** If you are missing any required fields, you will receive an error message.

The form is now signed and submitted. It can be found in all of the 3 places forms are filed. This view is the main screen central filing MSC2 list under **Active MSC2**.

Workplace		MSC2-CHNG-Change Of MSC Vendor		
<b>My Work</b> Announcements Queues Reports  <b>People</b> Individuals Contacts  <b>Agencies</b> Agencies Program Codes DDSOs  <b>Forms</b> DDP1-Registration/Move... DDP2-Dev. Disabilities Pr... DDP4-Conf. Needs Ident... <b>MSC2-CHNG-Change Of ...</b> MSC2-WTU-Workload	Search for records		View: Active MSC2	
	New   More Actions			
	Name	Created On	Form Status	
	MSC2 for BUCKLAND,GASTON	11/20/2010	Saved	
	MSC2 for BUCKLAND,GASTON	11/20/2010	Saved	
	MSC2 for BUCKLAND,GASTON	11/20/2010	Copied	
	MSC2 for BUCKLAND,GASTON	11/20/2010	Saved	
	MSC2 for BUCKLAND,GASTON	11/20/2010	Copied	
	MSC2 for CREED,KADEN	11/9/2010	Saved	
	MSC2 for DILEONE,MERISA	11/20/2010	Submitted	
MSC2 for MASI,CARMILA N	11/10/2010	Saved		
MSC2 for MASSOTH,KAGAN	11/18/2010	Submitted		