

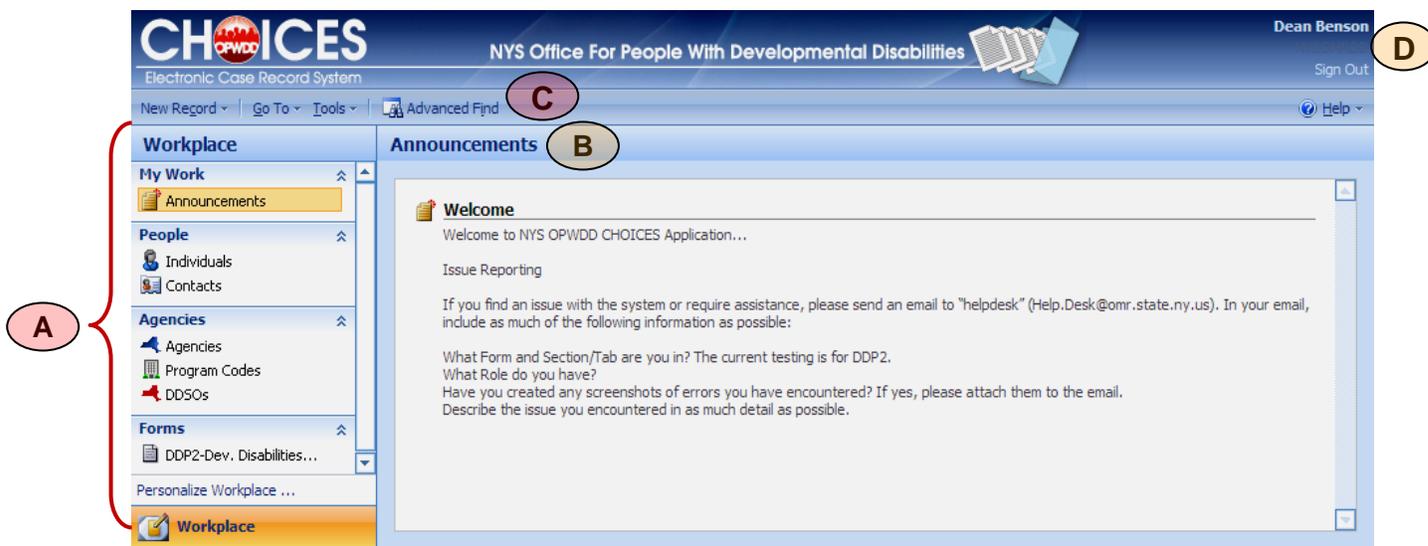
MSC5 – MSC Agreement

Effective October 1, 2010, the *MSC Agreement* is to be signed only once in a lifetime by an individual or a family. Previously, the form had to be signed annually. If there is a change in vendor, it is not necessary to do a new MSC5 form. However, if a vendor opts to do a new MSC5 form, it is fine to do so.

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.

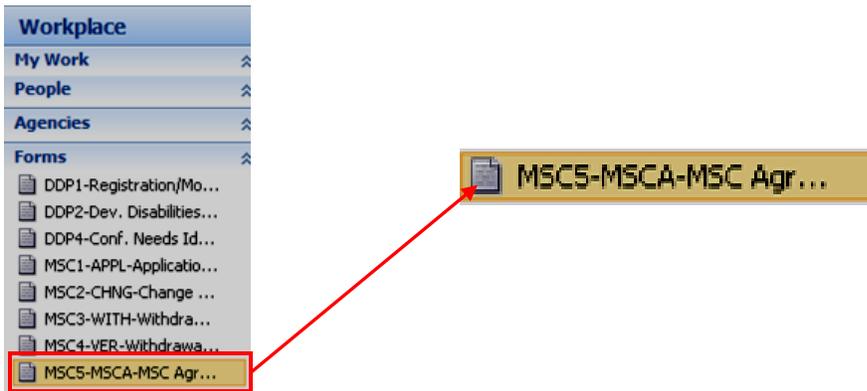
Upon logging into CHOICES, the default is to “Announcements,” which notes System messages, explains new features or gives helpful information. Depending on your role, only certain items may be available.



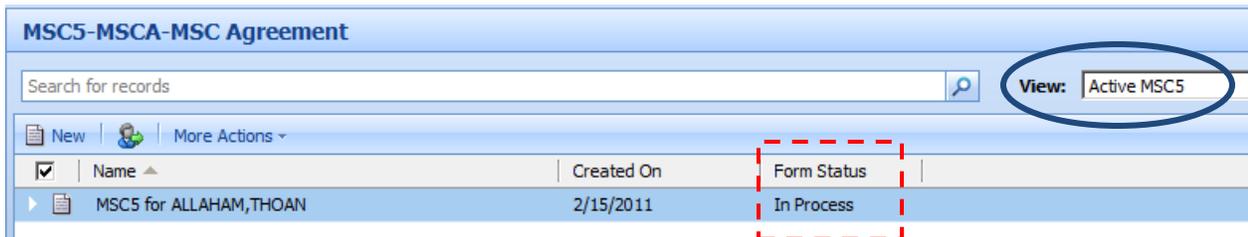
- A** The Workplace Menu or navigation column is how to move around inside the application.
- B** The content pane displays the folder you have highlighted in the Workplace Menu.
- C** The Toolbar which duplicates all the actions available under the Workplace Menu
- D** Display of the user signed on 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 completed or partially completed and saved forms:



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

- **In Process** means that the record has been completed and signed by the Service Coordinator but is awaiting signature of the Service Coordinator's Supervisor.
- **Saved** status means that the record is incomplete but saved.

Use the dropdown arrow to highlight **Inactive** to view any form that was **Completed**.

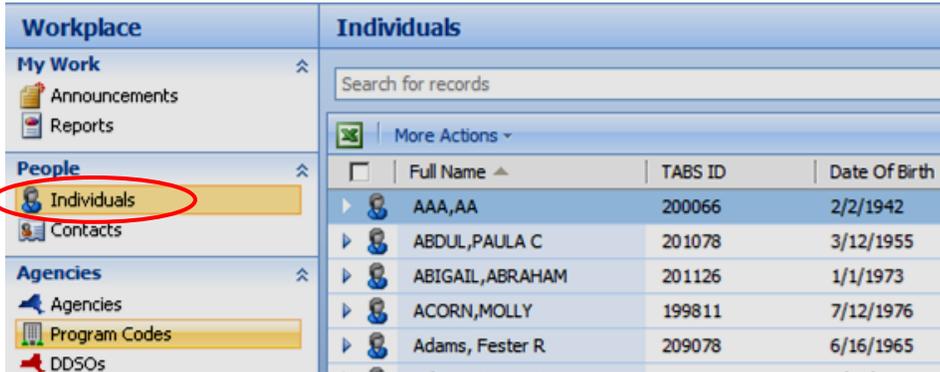


NOTE: A form becomes "Completed" once the Service Coordinator's Supervisor signs the form.

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

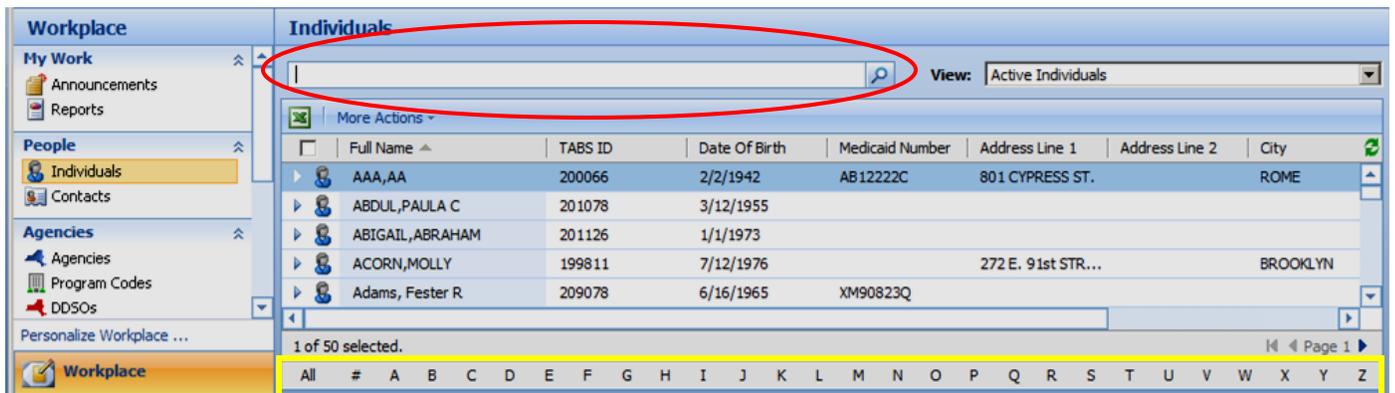
Create a New Form

To create a new MSC5 go to **Workplace**, under **People**, click the “**Individuals**” link:



The Individuals section displays everyone that is known to TABS.

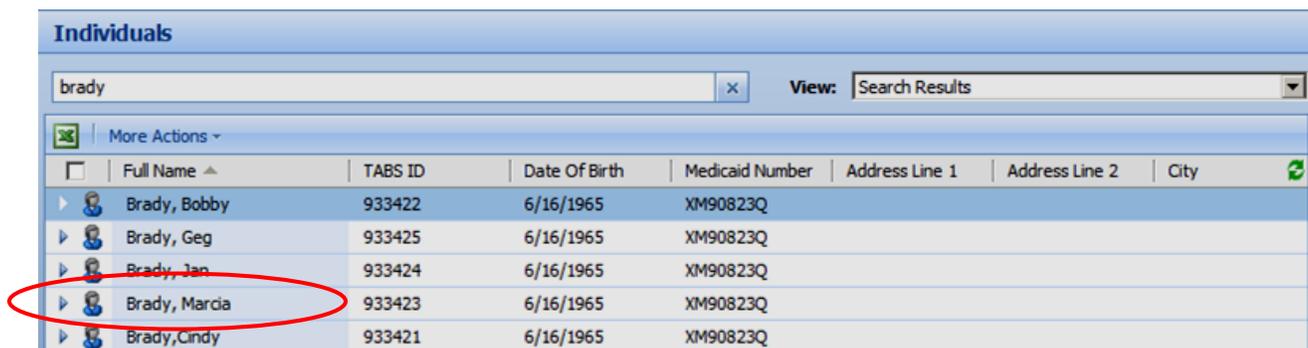
In the Individuals section, you can search by name in either the area where it states **Search for records** or by clicking the first letter of the last name at the bottom of the screen.



In this example, we want to look for Marcia Brady. 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.

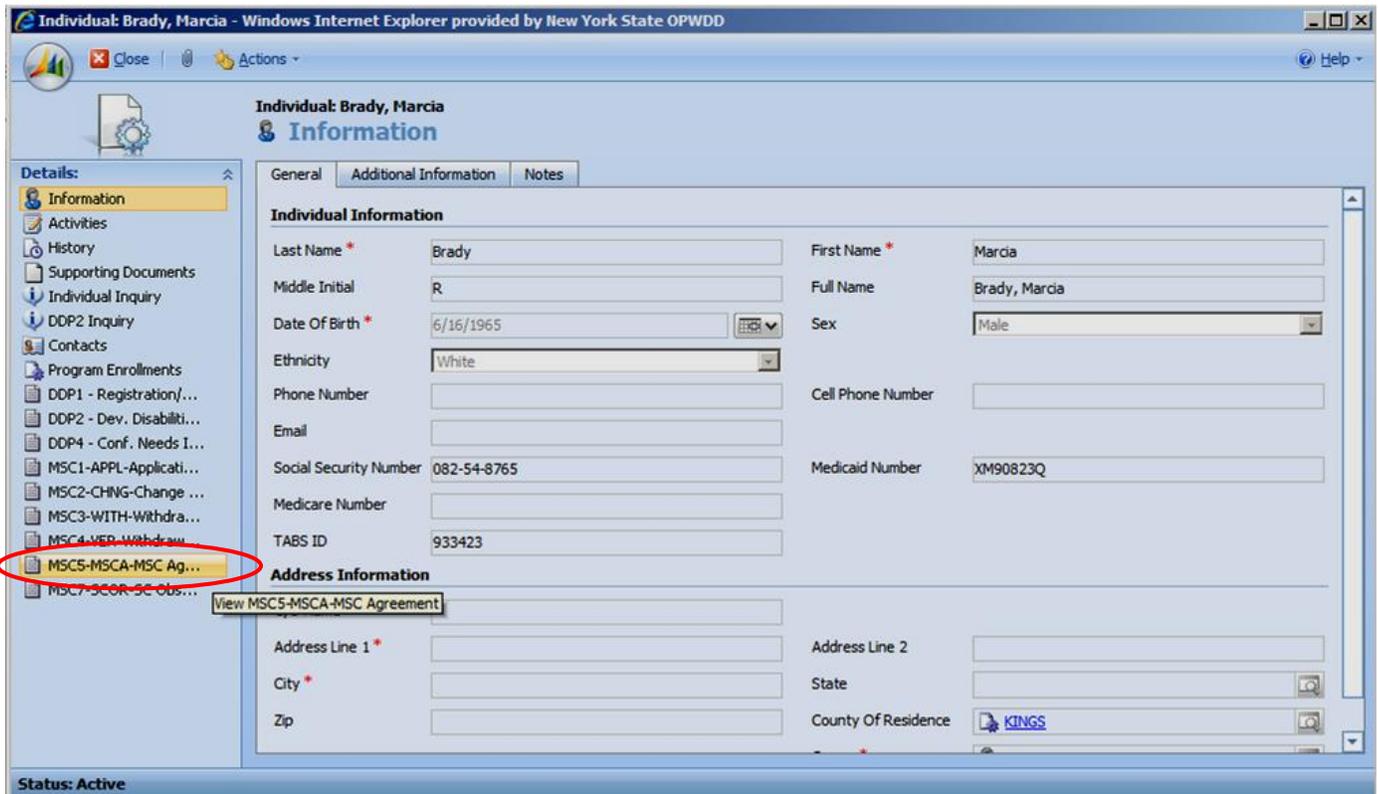
To start an MSC5 for Marcia Brady, **click in the row** to highlight **and then double-click**.



A screen appears with her information pulled directly from TABS.

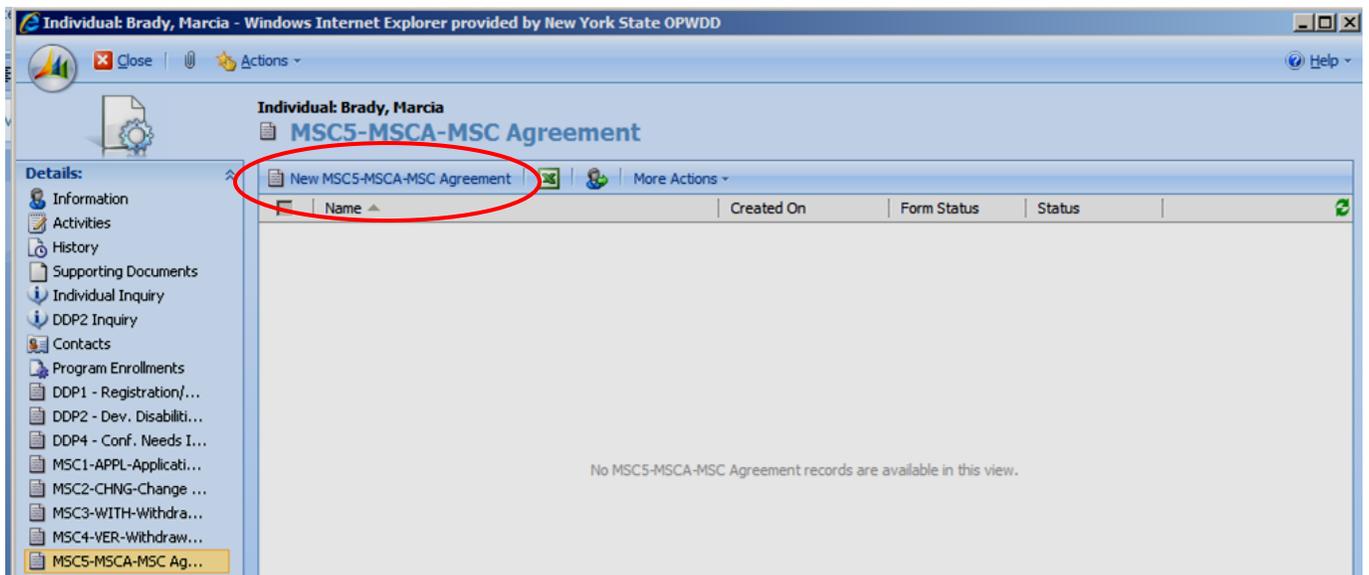
Confirm that the Individual displayed is the correct person by reviewing the pre-populated fields.

On the left side of the screen under **Details**, click **MSC5-MSCA-MSC Ag...** link.



Currently, there is no MSC5 for Marcia Brady.

To start a new agreement, click the **New –MSC5-MSCA-MSC Agreement** link.



Completing the Form

Upon opening, the **General** tab is displayed. There are no fields to be completed in this section.

MSC5-MSCA-MSC Agreement: MSC5 for Brady, Marcia - Windows Internet Explorer provided by New York State OPWDD

Save and Close Submit Form View PDF Help

MSC5-MSCA-MSC Agreement: MSC5 for Brady, Marcia

Information

Details: Information Activities History

General Rights and Responsibilities Signatures Notes

Individual Information:

Individual * Brady, Marcia TABS ID 933423

Medicaid Number XM90823Q

The purpose of this document is to outline your rights and responsibilities under the Medicaid Service Coordinator (MSC) program and what your service coordinator will do for you. This document must be reviewed with you at the same time of enrollment in MSC and signed. It only needs to be signed once, but must be reviewed once a year with your service coordinator. * This document should be forwarded to the chosen provider whenever you change MSC vendors.

* If you are already receiving MSC services, you will be signing this form at the time of a meeting with your service coordinator. This document replaces all the MSC Basic Agreements (MSC5-SCBA or MSC5-Supr-SCBA) signed by you and your family member/advocate before October 1, 2010.

Status: Active

Done Trusted sites Protected Mode: Off 100%

Click **Rights and Responsibilities** tab, and review your rights and responsibilities (scroll down to view all info).

MSC5-MSCA-MSC Agreement: New

Information

General Rights and Responsibilities Signatures Notes

Informed Choice

You and your service coordinator will talk about Informed Choice. Your service coordinator will help you make informed choices.

The service coordinator assists individuals on his/her caseload to understand and make informed choices.

A person has made an informed choice when he or she has made a decision based on a good understanding of the options available and a good understanding of how that choice may affect his or her life.

A person can make an informed choice on his/her own or may ask family members, friends, or others for assistance if the individual needs help making a good decision. Informed choices can be about everyday things, like what to wear, or big life changing things like where to live, what kind of work to do, or who to be friends with. These decisions can also be about what kinds of services or supports someone wants or needs, and where and how to get them.

When making an informed choice, a person should understand the possible risks involved and what can be done to reduce the risks. A person should also realize that his/her ability or desire to make choices may change over time, or may be different for different kinds of decisions.

Personal choices should be respected and supported by others involved in the person's life.

Free choice of MSC vendor and service coordinator

You have the right to make an informed choice about your service coordination vendor and service coordinator.

If you think you can be better served by another service coordination vendor, you can request information from your service coordinator or the DDSO about other service coordination vendors that may be available.

Click **Signatures** tab and fill in all **required (*)** fields and any other information known. (**Required** is noted by asterisk.)

The **Signature** screen looks like:

The screenshot shows the 'Signatures' tab of the 'MSC5-MSCA-MSC Agreement: New' form. The 'Signatures' tab is circled in red. The form contains the following sections:

- Agency/DDSO**:
 - MSC Vendor / DDSO * (SYRACUSE DEVELOPMENTAL CENTER (DC))
 - Service Coordinator * (Krishna Vemula)
 - Service Coordinator Supervisor *
 - Service Coordinator's Electronic Signature
 - Supervisor's Electronic Signature
- Individual/Family Member**:
 - Has Individual signed paper acknowledging this document? *
 - Has Family Member or advocate signed paper acknowledging this document? *
 - Name of Family Member or Advocate
 - Date Signed
- CHOICES Portal User Information**:
 - Name
 - Relationship To Individual
 - Send Form to Choices Portal (No/Yes)
 - CHOICES Portal User Electronic Signature
 - Specify Other Relationship
 - Does CHOICES Portal User choose not to sign? (No/Yes)

Agency/DDSO section

MSC Vendor / DDSO field and **Service Coordinator** field are defaulted.

Service Coordinator Supervisor field needs to be filled.

This close-up screenshot focuses on the 'Agency/DDSO' section of the 'Signatures' tab. The 'Agency/DDSO' section is circled in red. The 'Service Coordinator Supervisor' field is also circled in red.

- Agency/DDSO**:
 - MSC Vendor / DDSO * (SYRACUSE DEVELOPMENTAL CENTER (DC))
 - Service Coordinator * (Krishna Vemula)
 - Service Coordinator Supervisor *
 - Service Coordinator's Electronic Signature
 - Supervisor's Electronic Signature

To select a Service Coordinator Supervisor, **click** .

A list of names displays:

Full Name ▲	Agency	Business Unit
 Dean Benson	SYRACUSE DEVELC	CENTRAL NEW YORK DDSC
 James Nelson	SYRACUSE DEVELC	CENTRAL NEW YORK DDSC
 Krishna Vemula	SYRACUSE DEVELC	CENTRAL NEW YORK DDSC
 Lenin Lopez	SYRACUSE DEVELC	BROOKLYN DDSC
 Lenin nysomrdd	SYRACUSE DEVELC	BROOKLYN DDSC
 lenin test1	SYRACUSE DEVELC	BROOKLYN DDSC
 LeninDDSO LopezDDSO	SYRACUSE DEVELC	BROOKLYN DDSC
 Maureen Halloran	SYRACUSE DEVELC	CENTRAL NEW YORK DDSC
 Neville Clothier	SYRACUSE DEVELC	CENTRAL NEW YORK DDSC
 Patricia Walsh-Wasserman	SYRACUSE DEVELC	CENTRAL NEW YORK DDSC

Click in the row to highlight desired person **and then double-click:**

Selected person is populated in the field:

Service Coordinator
Supervisor *  [Patricia Walsh-Wasserman](#) 

Individual / Family Member Section

Fill in required fields:

- * “Has Individual signed paper acknowledging this document?”
- * “Has Family Member or advocate signed paper acknowledging this document?”

Click the down-arrow and **make appropriate selection:**

Individual/Family Member

Has Individual signed paper acknowledging this document? * Date Signed 

Has Family Member or advocate signed paper acknowledging this document? * Date Signed 

Name of Family Member or Advocate



If “Yes” is selected, then the * “Date Signed” becomes a required field.

If “No-unable/unwilling to sign” is selected, the date field is not required.

Individual/Family Member

Has Individual signed paper acknowledging this document? * Yes Date Signed * 3/24/2011 

Has Family Member or advocate signed paper acknowledging this document? * No – unable/unwilling to sign Date Signed 

Name of Family Member or Advocate



CHOICES Portal User Information Section

Although these are not required fields (no red asterisk), you may fill out desired fields.

CHOICES Portal User Information

Name CHOICES Portal User Electronic Signature

Relationship To Individual Specify Other Relationship

Send Form to Choices Portal No Yes Does CHOICES Portal User choose not to sign? No Yes

After all fields are filled out, the screen looks like:

MSC5-MSCA-MSC Agreement: New
Information

General Rights and Responsibilities Signatures Notes

By signing this form you, your family member or advocate (as necessary), service coordinator and service coordination supervisor affirm that MSC rights and responsibilities were discussed, that you made informed choices and that all parties understand and agree to the conditions specified.

Agency/DDSO

MSC Vendor / DDSO * [SYRACUSE DEVELOPMENTAL CENTER \(DC\)](#)

Service Coordinator * [Krishna Vemula](#) Service Coordinator's Electronic Signature

Service Coordinator Supervisor * [Patricia Walsh-Wasserman](#) Supervisor's Electronic Signature

Individual/Family Member

Has Individual signed paper acknowledging this document? * Yes Date Signed * 3/24/2011

Has Family Member or advocate signed paper acknowledging this document? * Yes Date Signed * 3/24/2011

Name of Family Member or Advocate * Cindy Brady

CHOICES Portal User Information

Name CHOICES Portal User Electronic Signature

Saving, Printing and Submitting the MSC5

Once the form is completed and all required fields have been entered, the MSC5 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.



 Saves the MSC5 – Gives it a Saved status and remains open for you to work on.

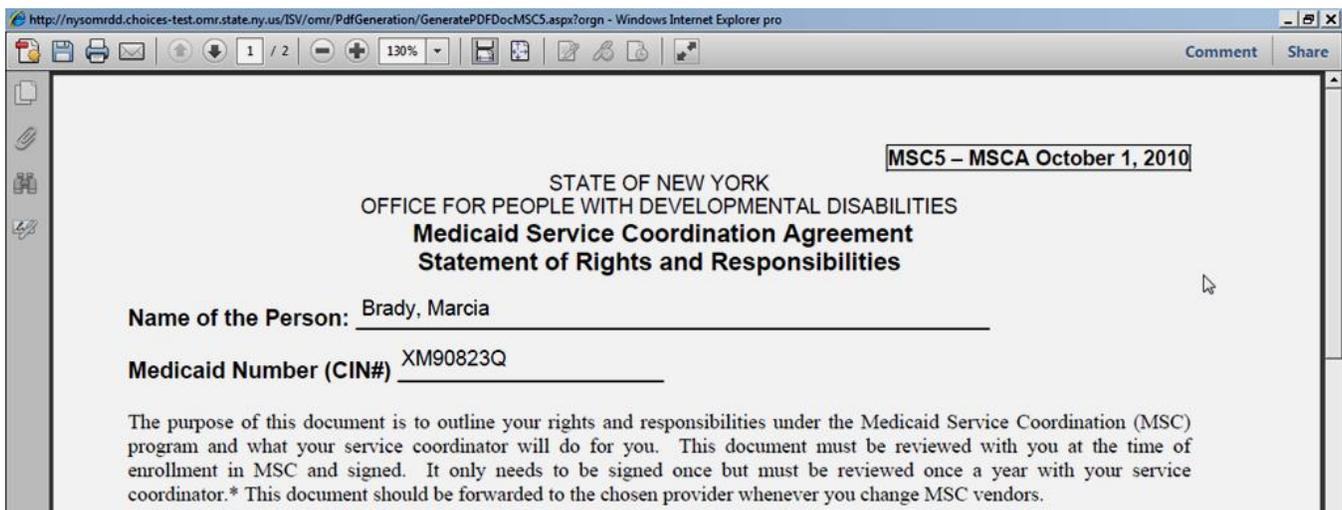
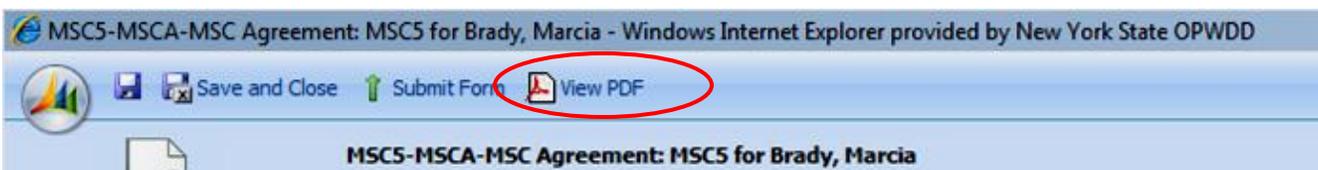
 **Save and Close** Saves the MSC5 and closes the form - Gives it a Saved status.

 **Submit Form** Submits the MSC5 to be processed - Gives this form an In Process status.

Once the MSC5 is saved, another button appears:

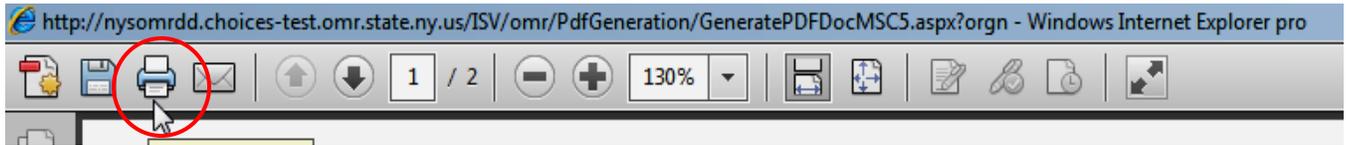
View PDF

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

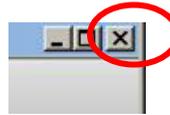


To Print the form do so from the PDF.

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 MSC5 form.

Submitting the Form

NOTE: The MSC5 can only be submitted by an MSC Coordinator

When the form is ready for submission, click 'Submit Form: button



TIP: If you are missing any required fields, an error message will display informing you what to 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).

Signature Form -- Webpage Dialog

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: Brady, Marcia

Service Coordinator: Krishna Vemula

Enter Password: [masked]

Submit Reset Close

Enter your Password and click the Submit button.

Process the MSC5

NOTE: The MSC5 can only be processed by a Service Coordinator Supervisor.

The form is now signed and submitted.

From the main screen, under **Active**, are the forms the MSC Supervisor need to open to sign and process.

Name	Created On	Form Status
MSC5 for Brady, Marcia	3/24/2011	In Process
MSC5 for HENNESSY, APRIL I	12/27/2010	In Process

MSC Supervisors can double click on any Individual in the list that they are responsible to process.

Once the form is opened, the **MSC Supervisor's name** will default into the signature field and if they are satisfied with the form they can process it to completion.

Click "Process Form"

By signing this form you, your family member or advocate (as necessary), service coordinator and service coordination supervisor affirm that MSC rights and responsibilities were discussed, that you made informed choices and that all parties understand and agree to the conditions specified.

Agency/DDS0

MSC Vendor / DDSO * 0233 - BROOME

Service Coordinator * train134 train134

Service Coordinator Supervisor * train161 train161

Service Coordinator's Electronic Signature train134 train134 on 04/01/2011

Supervisor's Electronic Signature

Once the form is **processed**, it will come off the **Active** list, and will be available for view under the **Inactive**.

MSC5-MSCA-MSC Agreement

Search for records **View:**

New More Actions ▾

<input type="checkbox"/>	Name ▲	Created On	Form Status
▶	MSC5 for Brady, Marcia	3/24/2011	Completed
▶	MSC5 for Brady, Marcia	3/24/2011	Completed
▶	MSC5 for Brady, Cindy	3/23/2011	Completed
▶	MSC5 for HENNESY, APRIL I	12/27/2010	Completed
▶	MSC5 for HENNESY, APRIL I	12/27/2010	Completed
▶	MSC5 for JOHNSON, LISA D	1/20/2011	Completed
▶	MSC5 for JOHNSON, LISA D	1/25/2011	Completed
▶	MSC5 for KILBY, MICHAEL	12/27/2010	Completed

Error Messages

If any person other than an MSC Supervisor tries to Process the form, the following message is received.

The wording notes “submitted” but it is at the point of processing by a Service Coordinator Supervisor.

MSC5-MSCA-MSC Agreement: MSC5 for ANGRAND, EARVIN-RECIO W - Windows Internet Explorer provided by New York State OPWDD

Save and Close Process Form View PDF

MSC5-MSCA-MSC Agreement: MSC5 for ANGRAND, EARVIN-RECIO W

Information

Details: Information Activities History

General Rights and Responsibilities Signatures Notes

By signing this form you, your family member or advocate (as necessary), service coordinator and service coordination supervisor affirm that MSC responsibilities were discussed, that you made informed choices and that all parties understand and agree to the conditions specified.

Agency/DDS0

MSC Vendor / Service Coord [train134 train134 on 04/01/2011](#)

Service Coord Supervisor * This form can only be submitted by a Service Coordinator Supervisor

Individual/F

Has Individual paper acknow this document: 2011

Has Family Member or No – unable/unwilling to sign Date Signed

Sort the Information in any List

Individual: Brady, Marcia

MSC5-MSCA-MSC Agreement

New MSC5-MSCA-MSC Agreement | More Actions ▾

<input type="checkbox"/>	Name ▲	Created On	Form Status	Status	
▶	MSC5 for Brady, Marcia	3/24/2011	Completed	Inactive	

- 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.