

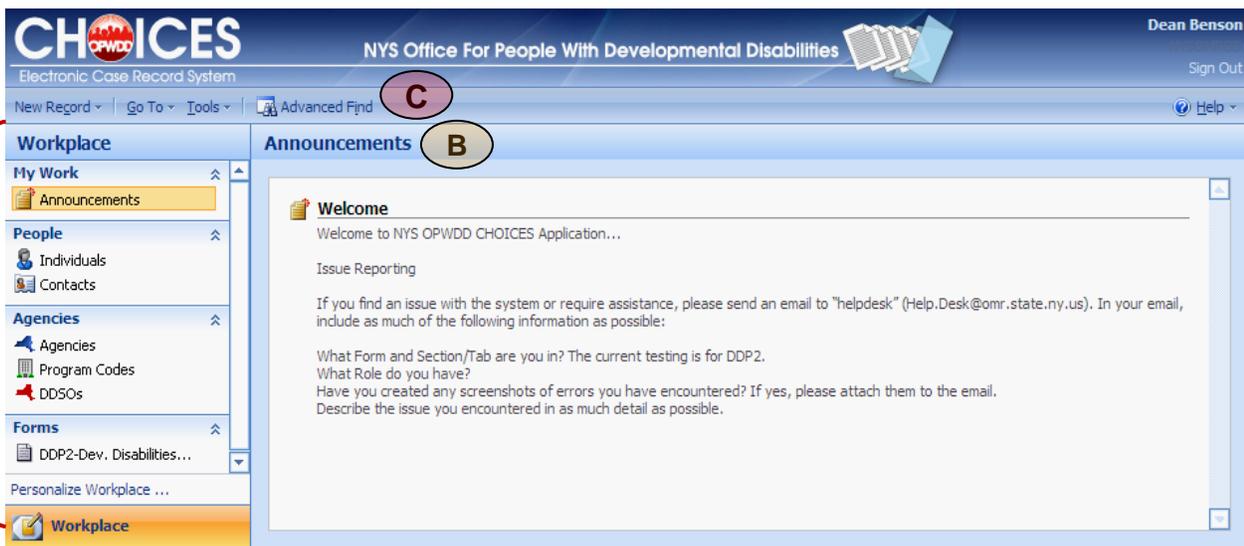
MSC9 – Medicaid Service Coordination Activity Plan

The Activity Plan describes the short-term service coordination activities that are most important to the individual and that will help the individual meet the individualized valued outcomes described within their ISP.

This form can only be completed by a Service Coordinator (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).
- 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.

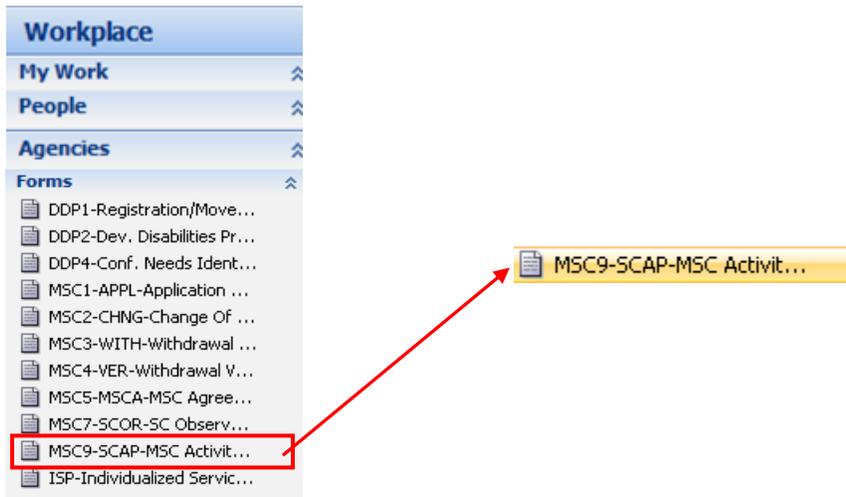
Upon logging into CHOICES, the default is to “Announcements,” which notes System messages, explains new features or gives helpful information. Depending on your role, only certain items may be available.



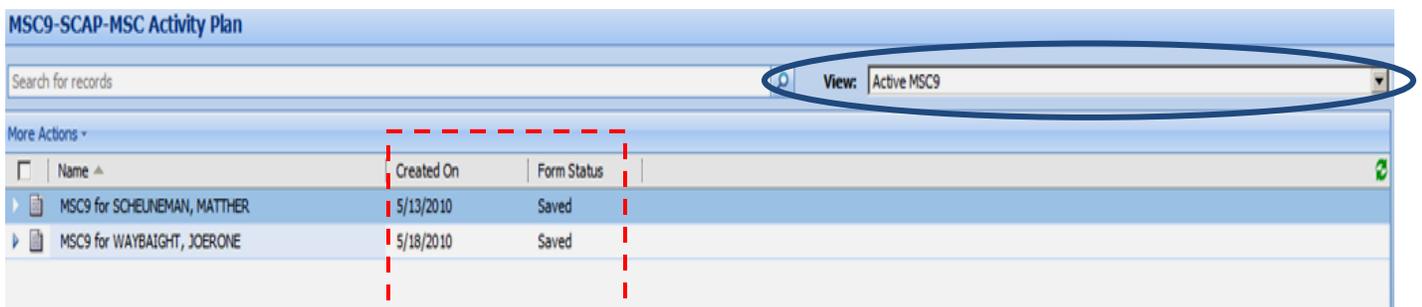
- A** The Workplace Menu or navigation column is how to move around inside the application.
- B** The content pane displays the folder you have highlighted in the Workplace Menu.
- C** The Toolbar which duplicates all the actions available under the Workplace Menu
- D** Display of the user signed on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

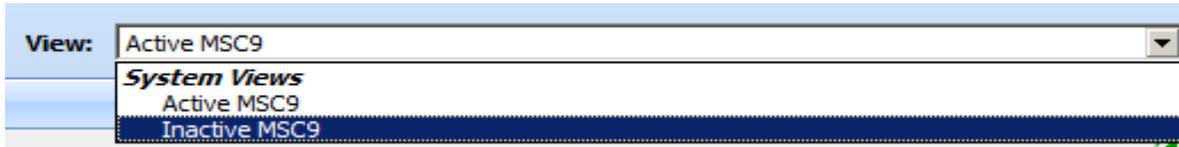


The **View** above is set to **Active MSC9**. You can see the status of each.

Created On and Form Status. Created on means the date the form was created. The form status is either saved, copied or completed. For this example of the MSC9, the form status is saved.

NOTE: A form becomes "Completed" once the Service Coordinator submits the MSC9. After the form is submitted it is moved to the Inactive view.

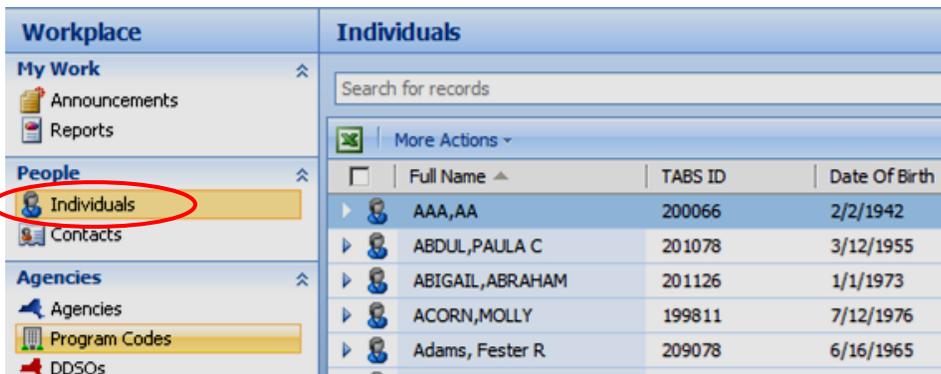
Use the dropdown arrow to highlight **Inactive** to view any forms that have been submitted. The MSC9 does not go to the DDSO for processing. **Inactive** forms cannot be changed.



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

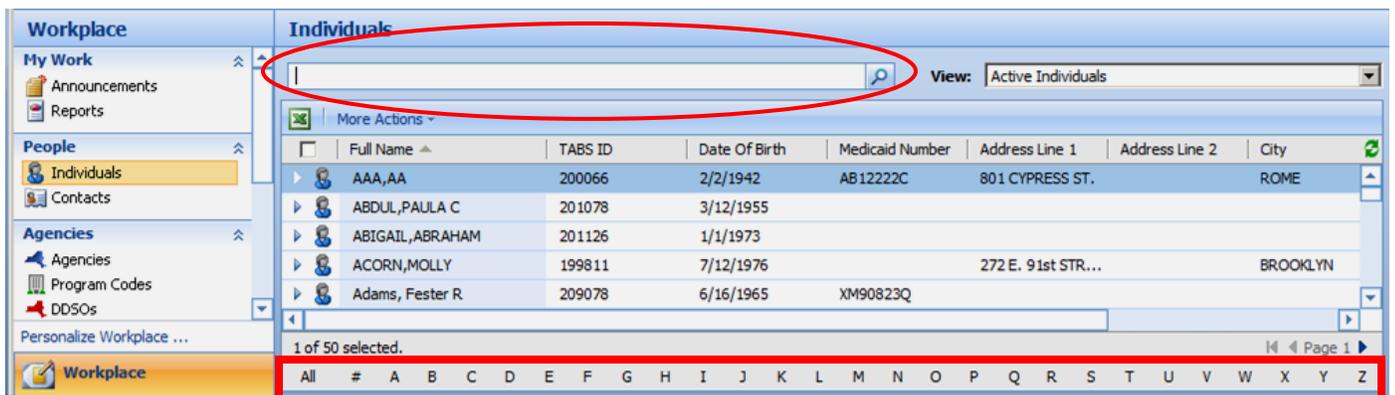
Create a New Form

To create a new MSC9 go to **Workplace**, under **People**, click the “**Individuals**” link:



The Individuals section displays everyone that is known to TABS that can be viewed by your DDSO or Agency.

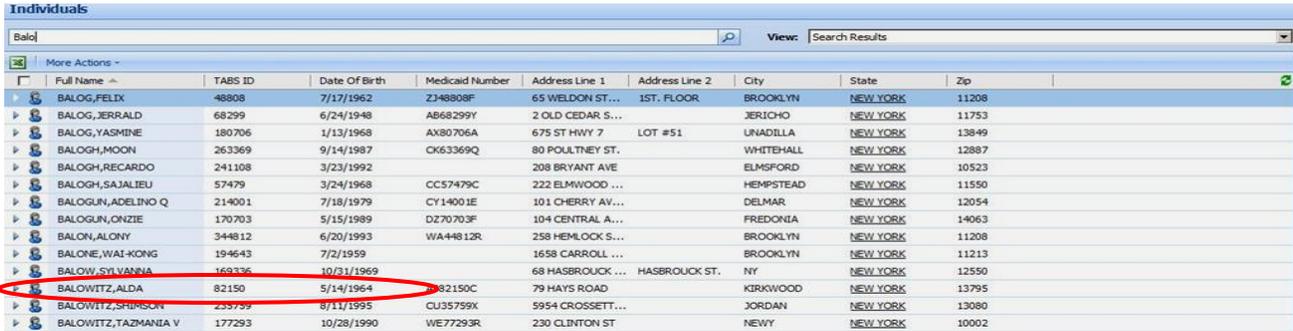
In the Individuals section, you can search by name in either the area where it states **Search for records** or by clicking the first letter of the last name at the bottom of the screen.



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 MSC9 for Alda Balowitz, **click in the row** to highlight **and then double-click**.

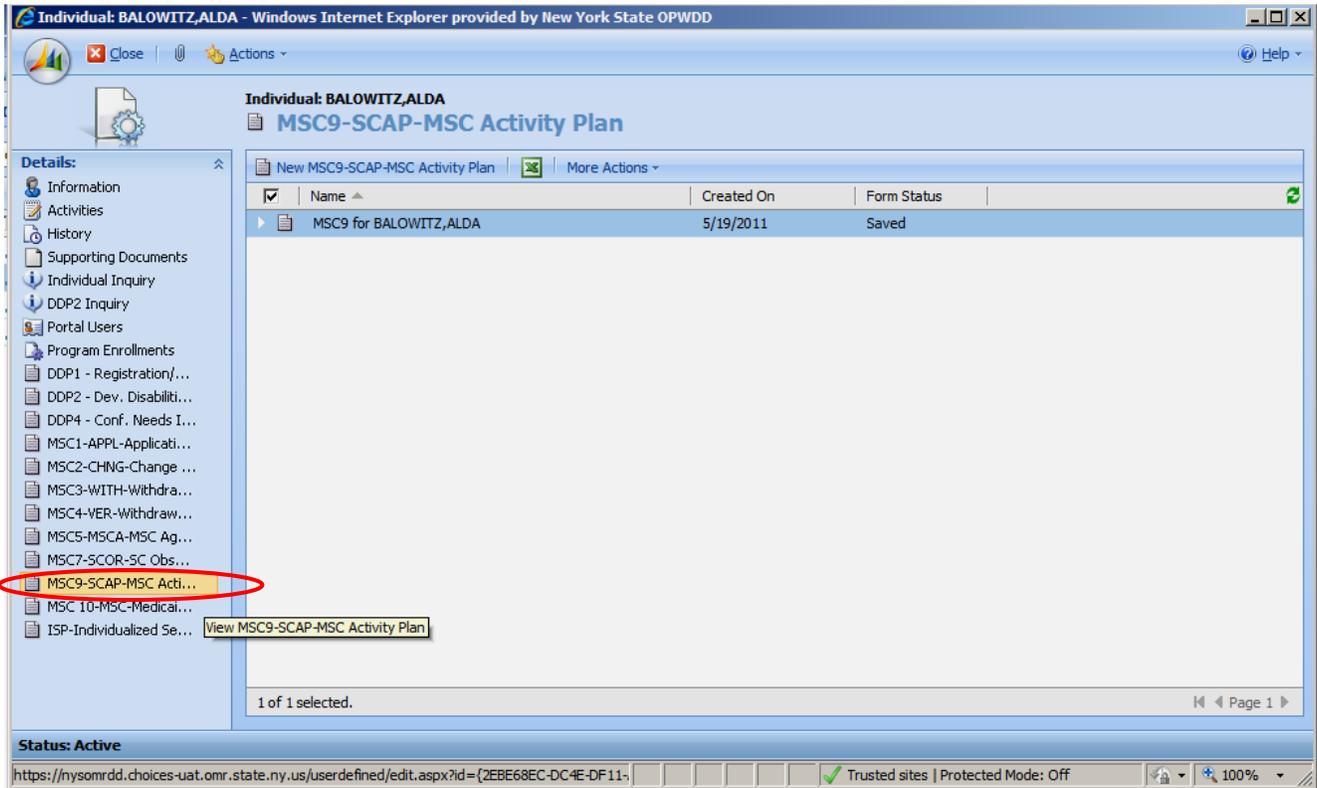


Full Name	TABS ID	Date Of Birth	Medicaid Number	Address Line 1	Address Line 2	City	State	Zip
BALOG, FELIX	48808	7/17/1962	Z148808F	65 WELDON ST...	1ST. FLOOR	BROOKLYN	NEW YORK	11208
BALOG, JERRALD	68299	6/24/1948	AB68299Y	2 OLD CEDAR S...		JERICO	NEW YORK	11753
BALOG, YASMINE	180706	1/13/1968	AX80706A	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, SHIRSON	235739	8/11/1995	CJ35739X	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 **MSC9-MSCA-MSC Ag...** link.



Individual: BALOWITZ, ALDA

MSC9-SCAP-MSC Activity Plan

Details:

- Information
- Activities
- History
- Supporting Documents
- Individual Inquiry
- DDP2 Inquiry
- Portal Users
- 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...
- MSC7-SCOR-SC Obs...
- MSC9-SCAP-MSC Acti...**
- MSC 10-MSC-Medical...
- ISP-Individualized Se...

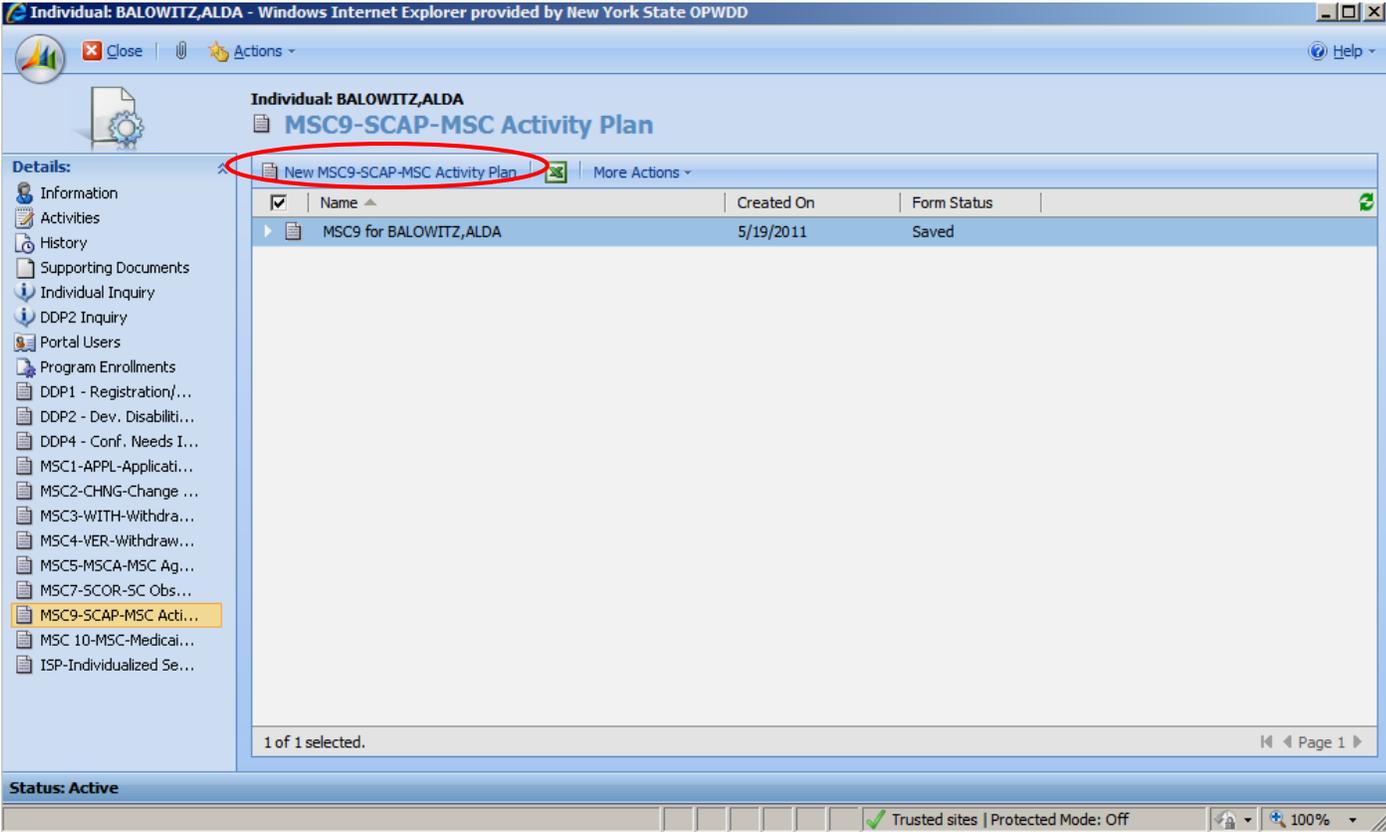
Name	Created On	Form Status
MSC9 for BALOWITZ, ALDA	5/19/2011	Saved

1 of 1 selected.

Status: Active

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

To start a new Medicaid Service Coordination Activity Plan, click the **New –MSC9-SCAP – MSC Activity Plan** link.



Completing the Form

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

The screenshot shows a web browser window titled "MSC9-SCAP-MS Activity Plan: New - Windows Internet Explorer provided by New York State OPWDD". The browser's address bar and menu bar are visible. The main content area displays the "Information" tab of the "MSC9-SCAP-MS Activity Plan: New" form. The form is divided into two tabs: "General" (selected) and "Notes". The "General" tab contains the following fields:

Activity Plan	
Individual	BALOWITZ,ALDA
Individual First Name	ALDA
Individual Last Name	BALOWITZ
Agency *	0233 - BROOME
Service Coordinator *	train128 train128
TABS ID	82150
Date Of Initial Activity Plan *	
Send Form to CHOICES Portal	<input checked="" type="radio"/> No <input type="radio"/> Yes

The "Details" sidebar on the left lists: Information (selected), Activities, History, MSC9 Reviews, and Service Requests / P... The status bar at the bottom indicates "Status: New" and "Trusted sites | Protected Mode: Off".

If the MSC9 is created using the individual search, the demographic information related to the individual is defaulted in as well as the following fields: Service Coordinator (disabled field); Service Coordinator's agency (disabled field); and Send Form to CHOICES Portal is defaulted to No. Date of Initial Activity Plan is the only required field. After the Date of Initial Activity is populated and the form is saved and submitted, the form becomes inactive and locked from any further user input.

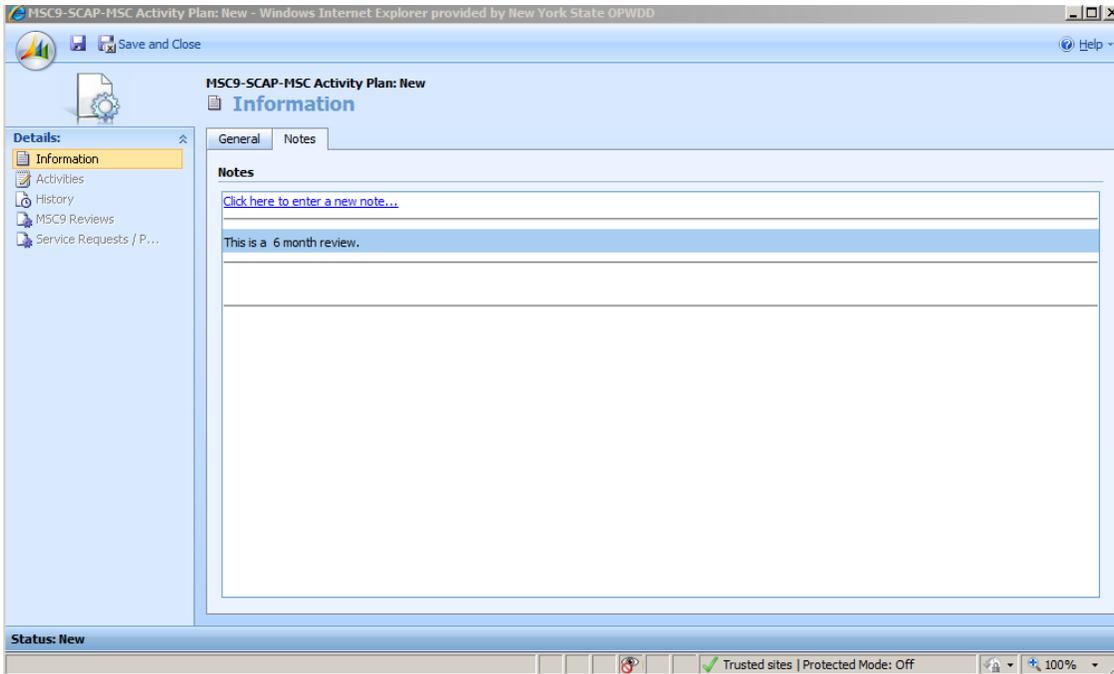
The MSC completes the required field, Date of Initial Activity Plan. This cannot be a future date.

The screenshot shows a web browser window titled "MSC9-SCAP-MSC Activity Plan: New - Windows Internet Explorer provided by New York State OPWDD". The page content is titled "MSC9-SCAP-MSC Activity Plan: New" and "Information". There are two tabs: "General" and "Notes". The "General" tab is active, showing an "Activity Plan" form. The form fields are as follows:

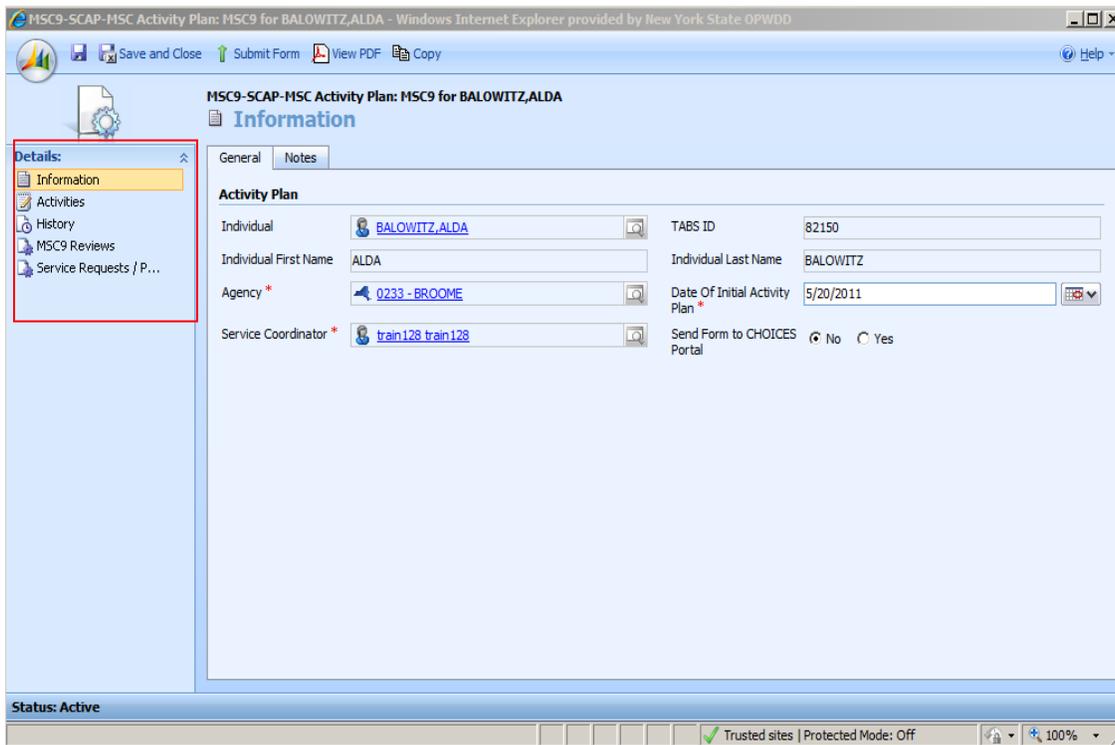
Individual	BALOWITZ,ALDA	TABS ID	82150
Individual First Name	ALDA	Individual Last Name	BALOWITZ
Agency *	0233 - BROOME	Date Of Initial Activity Plan *	5/20/2011
Service Coordinator *	train128 train128	Send Form to CHOICES Portal	<input checked="" type="radio"/> No <input type="radio"/> Yes

The "Date Of Initial Activity Plan" field is highlighted with a red box. The browser's status bar at the bottom shows "Done", "Trusted sites | Protected Mode: Off", and "100%".

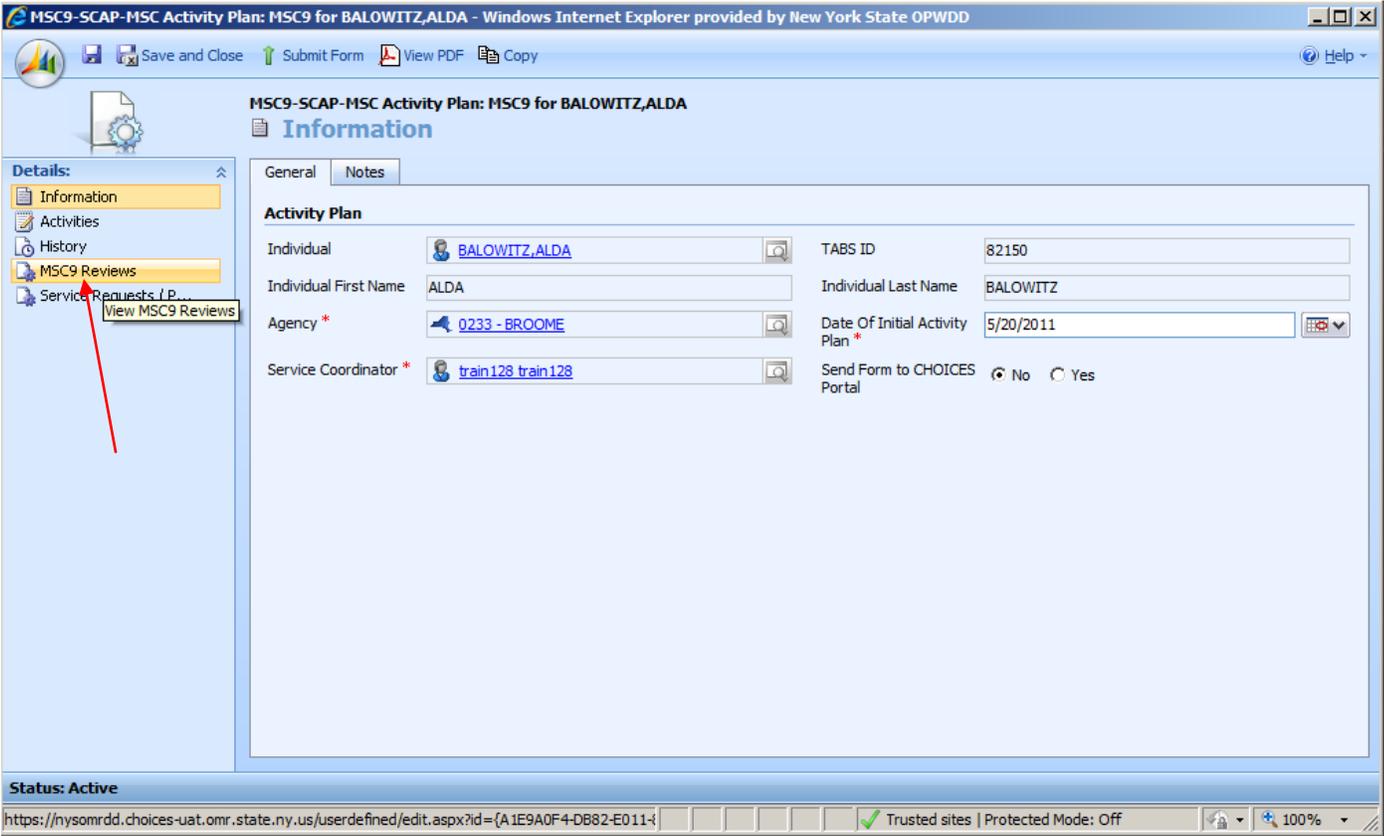
The Service Coordinator clicks on the Notes Tab and types in additional information. The Service Coordinator clicks on the General Tab and then clicks on the save icon in the left top corner .



The links in the details section become activated

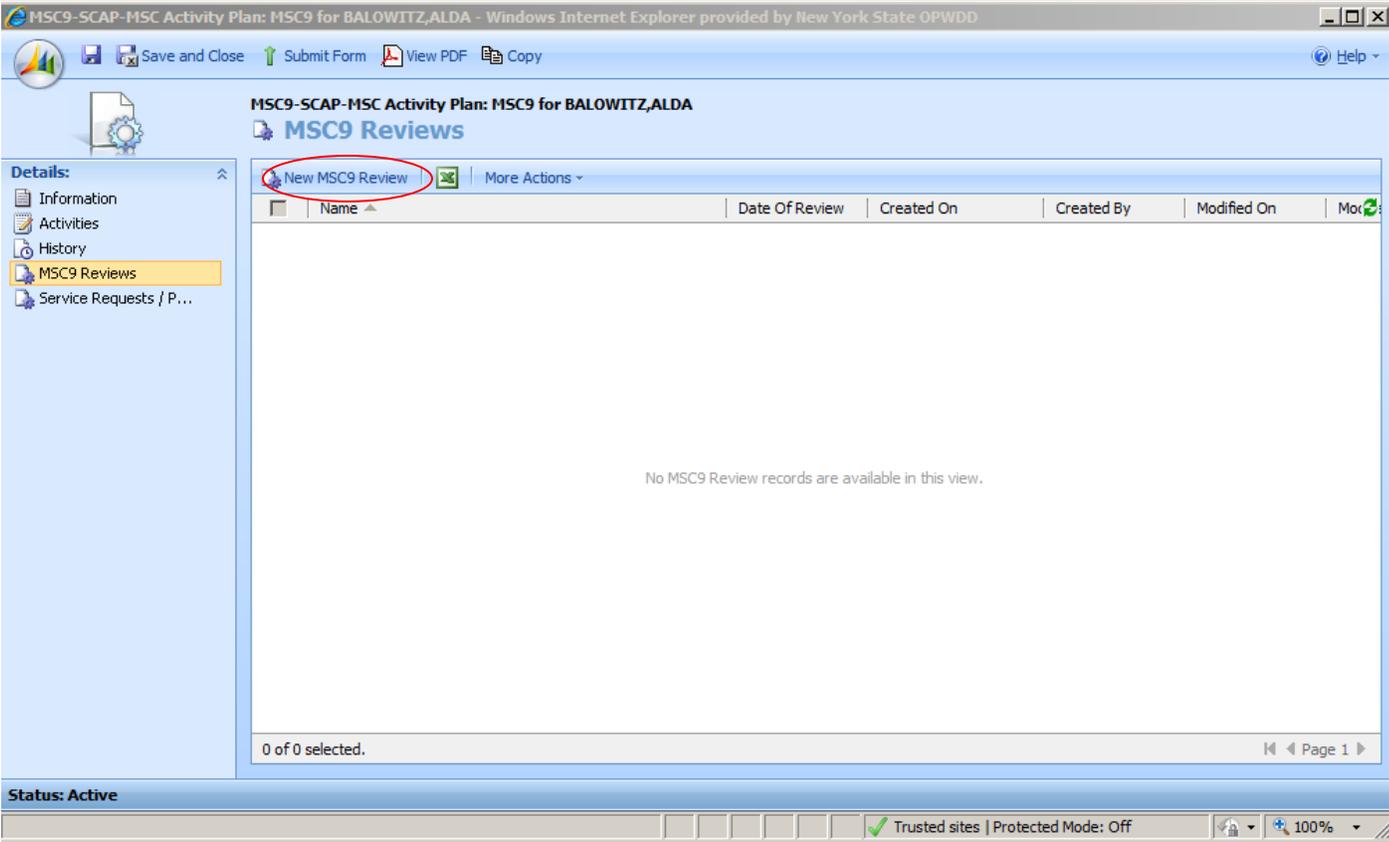


From this screen the Service Coordinator may create a new or additional MSC9 Reviews, Service Request and Personal Goals. In addition, the Service Coordinator is able to submit the MSC9; view the PDF version of the MSC9; or create a copy of the MSC9.



The Service Coordinator clicks on the link, MSC9 Reviews.

Click new MSC9 Review button to create a new or additional review.



There are no required fields within the MSC9 review form. The MSC9 review can only be saved and edited it cannot be submitted. The date of the MSC9 review cannot be a future date.

MSC9 Review: New - Windows Internet Explorer provided by New York State OPWDD

Save and Close Help

MSC9 Review: New
Information

Details:
Information
Activities
History

MSC9 Review

Review Details

MSC9 *

Is This Planned 6 Month Review Date Of Review

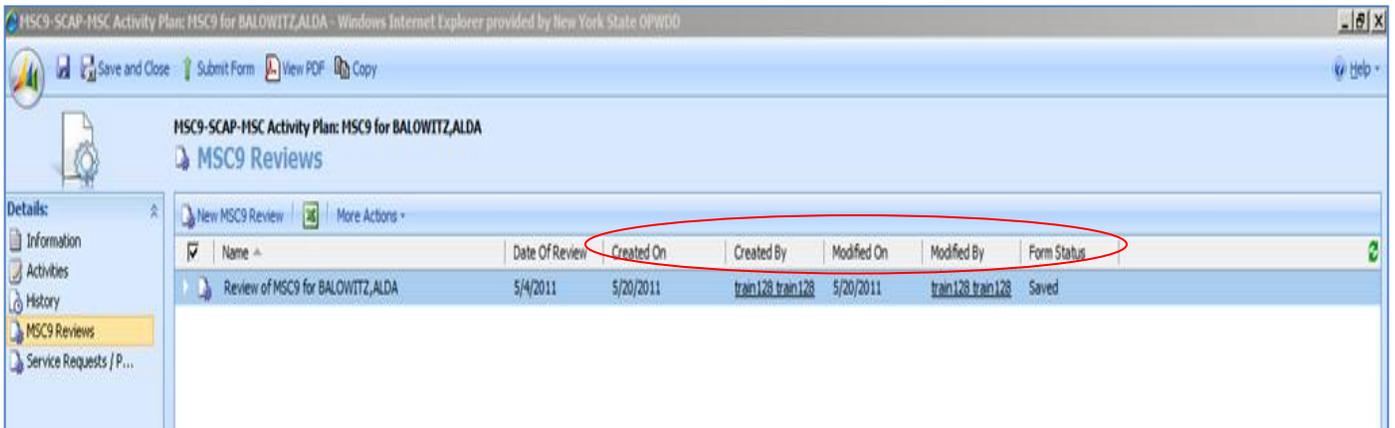
Review Notes
The Activity plan describes the short-term service coordination activities that are most important to you that will help you meet the individualized valued outcomes described in your ISP. Please write down the services you are requesting and/or personal goals that you would like to achieve. Then write down the activities you would like completed.

Service Coordinator

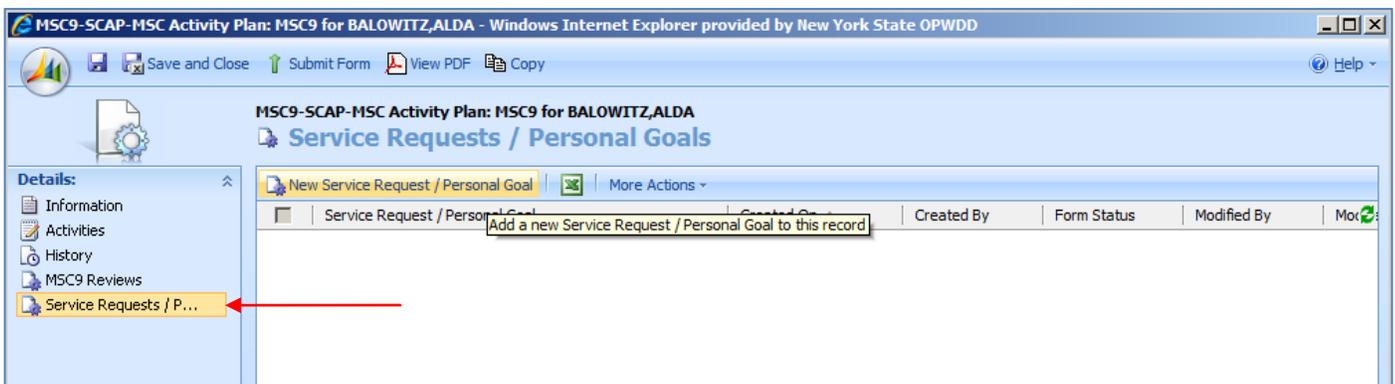
Status: New

Trusted sites | Protected Mode: Off 100%

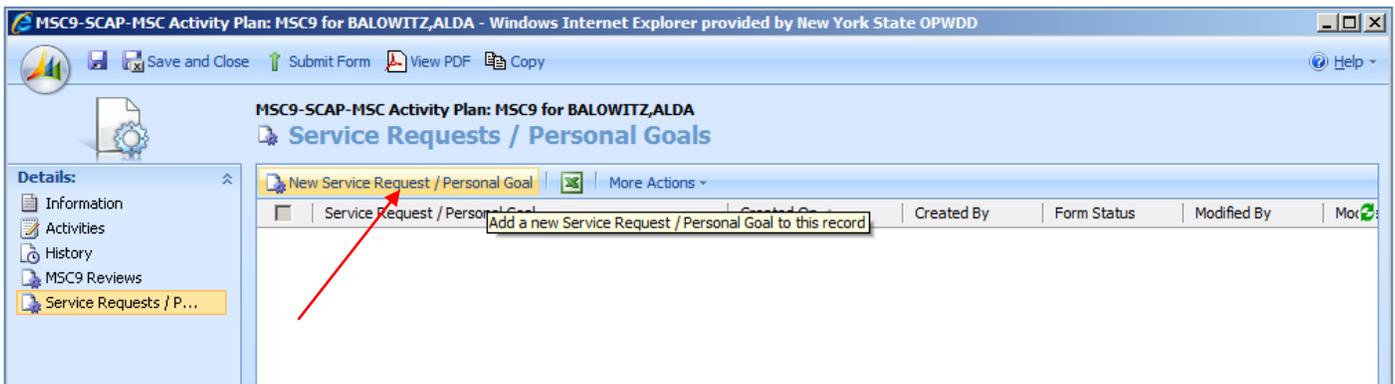
The Service Coordinator selects save and close. The columns give information about the review such as created on, created by, modified on, modified by and form status.



The Service Coordinator clicks on the link entitled Service Request/Personal Goal to document service requests and personal goals.



Service Coordinator clicks on New Service Request/Personal Goal to create a new or additional request/goal.

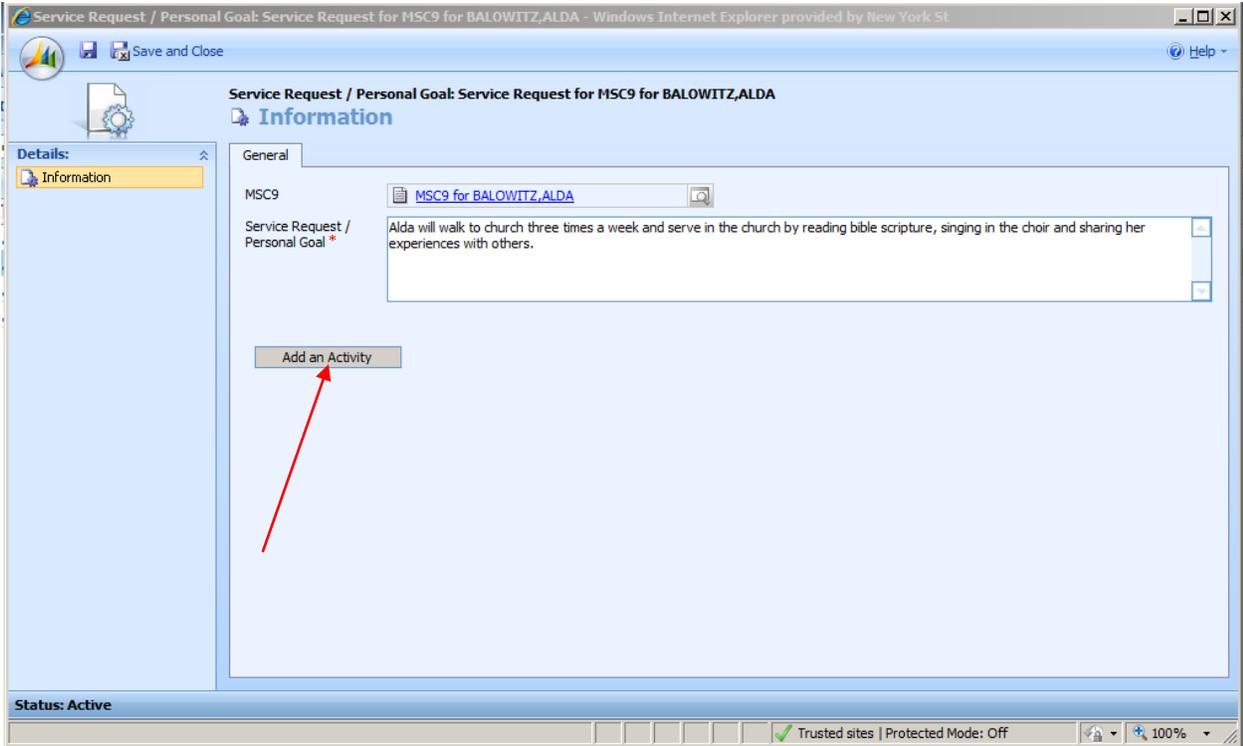


There is no limit on the number of services requests or personal goals.

There are no required fields in the Service Request/Personal Goal form (except initial goal when first creating this form). Service Requests/Personal Goals will not be locked to user input until MSC9 is saved and becomes Inactive/Completed.



The Service Coordinators choose Save and the Add an Activity dialog box appears.



The Service Coordinator clicks Add an Activity and a new form opens.

MSC9 Activity: New - Windows Internet Explorer provided by New York State OPWDD

Save and Close Help

MSC9 Activity: New
Information

Details: Information Activities History

General Notes

Activity To Complete

Activity Description *

Service Request Personal Goal Alda will walk to church three times a week and serve in the church by reading bible scripture, singing in the choir and sharing her experiences with others.

Will MSC Complete Task Will Individual Complete Task

Will Family Member Complete Task

Will Others Complete the Task Specify Others

Start Date

Is Task Complete Completion Date

Status: New

Done Trusted sites | Protected Mode: Off 100%

Within this form, the Service Coordinator completes the General Tab screen and uses the Notes Tab screen to add additional information.

MSC9 Activity: New - Windows Internet Explorer provided by New York State OPWDD

Save and Close Help

MSC9 Activity: New
Information

Details:
Information
Activities
History

General Notes

Activity To Complete

Activity Description * Attends church

Service Request Personal Goal Alda will walk to church three times a week and serve in the church by reading bible scripture, singing in the choir and sharing her experiences with others.

Will MSC Complete Task No Will Individual Complete Task Yes

Will Family Member Complete Task No

Will Others Complete the Task No Specify Others

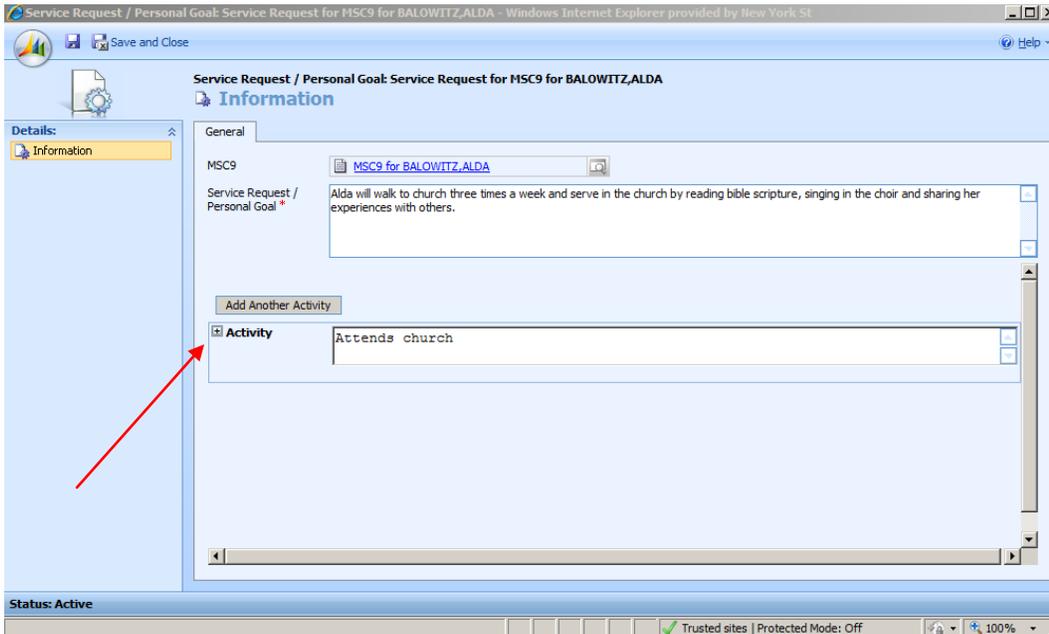
Start Date 5/23/2011

Is Task Complete No Completion Date

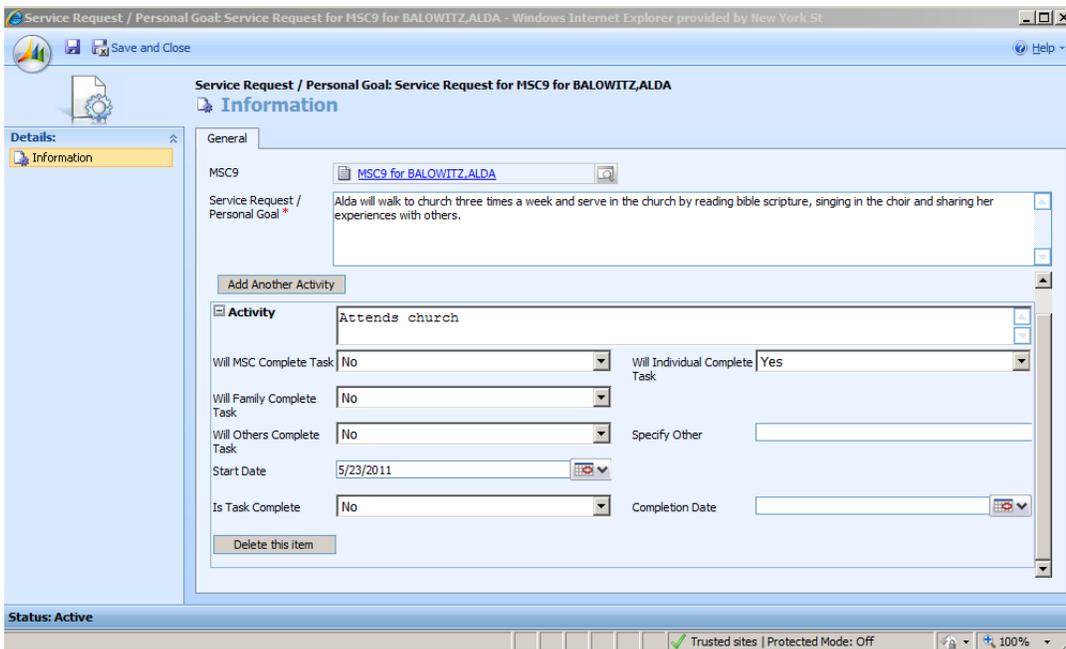
Status: New
javascript:onclick(); Trusted sites | Protected Mode: Off 100%

1. The only required field is the Activity Description.
2. There is no date validation on an activity's start date.
3. If "Is Task Complete" is yes, then Completion Date is enabled.
4. There is no date validation on an activity's completion date.

The Service Coordinator clicks save to save work or Save and close to return to the Service Request/Personal Goal screen. When the Service Coordinator saves and closes the Activity screen, the Service Coordinator can either add another activity or click on the (+) sign by the activity field and edit the existing activity.

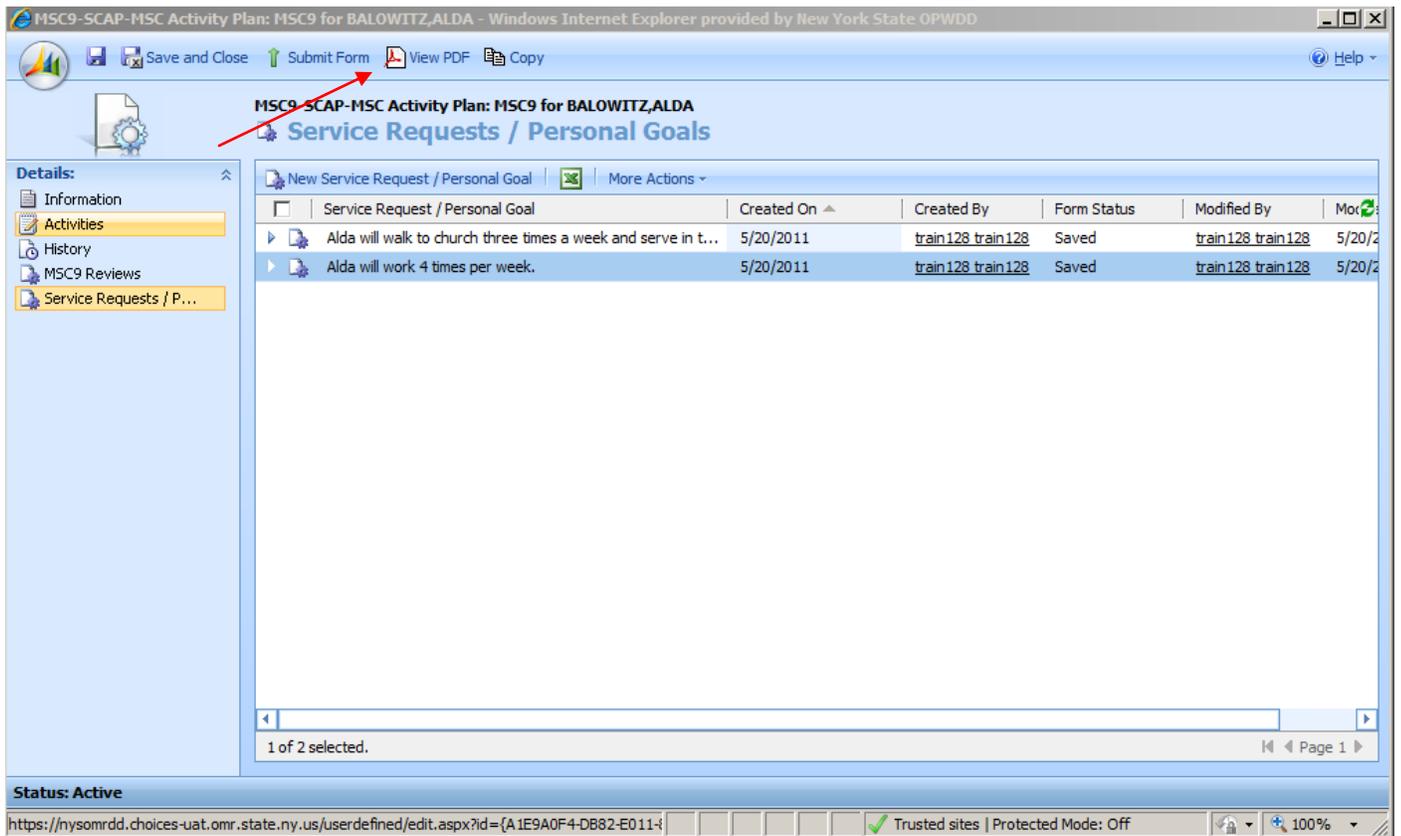


The Service Coordinator clicks on the (+) sign by the activity field to edit the existing activity.



1. Activities will not be locked to user input until MSC-9 is submitted and becomes Inactive/Completed.
2. Individual activities can be edited or deleted.

The Service Coordinator clicks save and close to return to the main MSC9 screen.



To view the PDF, the Service Coordinator clicks on View PDF.

MSC9 for ALDA BALOWITZ[1].pdf - Adobe Reader

File Edit View Window Help

1 / 1 150%

Comment Share

NYS Office For People With Developmental Disabilities
Putting People First

MSC9-SCAP
 MEDICAID SERVICE COORDINATION ACTIVITY PLAN

Individual's Name: ALDA BALOWITZ	MSC's Name: train128 train128	Date of Initial Activity Plan: 12/08/2010	Date of 6 Month Review: 05/19/2011
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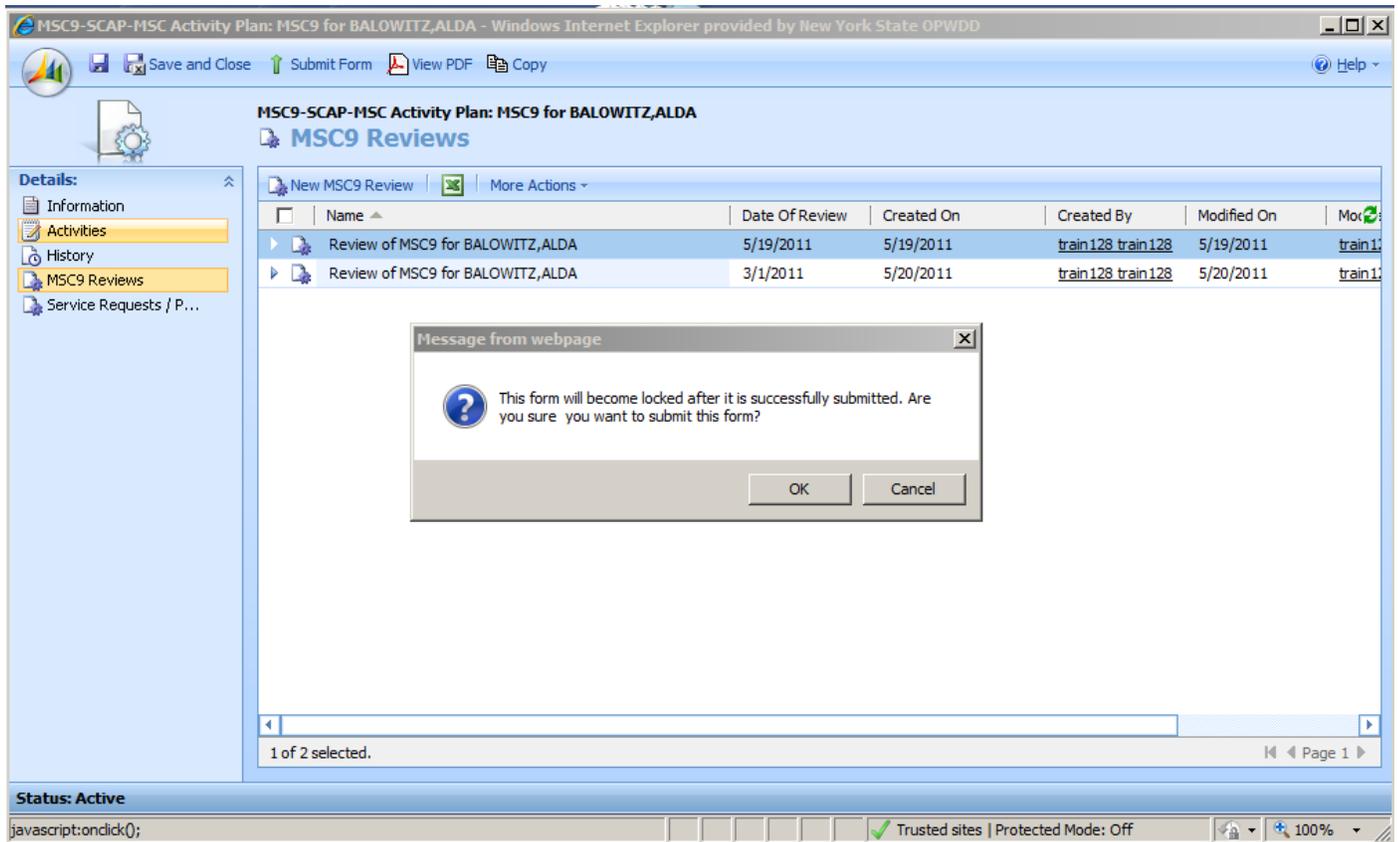
The Activity Plan describes the short-term service coordination activities that are most important to you and that will help you meet the individualized valued outcomes described in your ISP. Below write down the services you are requesting and/or the personal goals that you would like to achieve. Then write down the activities you would like completed. Also, show the person responsible for completing each activity and the date that work begins on an activity. In the final box, place a check when an activity is completed. This list must be reviewed at least every six months but you may add activities at any time.

Service Request or Personal Goal: Walk to the corner store everyday and purchase afternoon snack with no supervision.						
Activities to Complete	X Who Will Complete Task				Start Date	X if Task is Done
	MSC	Ind.	Fam.	Oth.		
Walked to the store and returned home with no supervision		X			05/26/11	
Service Request or Personal Goal: Alda will walk to church three times a week and serve in the church by reading Bible scriptures, singing in the choir, and sharing her experiences with others.						
Activities to Complete	X Who Will Complete Task				Start Date	X if Task is Done
	MSC	Ind.	Fam.	Oth.		
Reading Bible Scripture		X	X		05/24/11	X

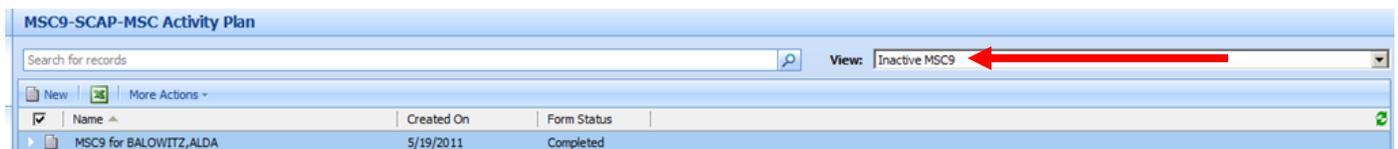
If there are more than one MSC9 Reviews on record, only the latest 6 Month Review will print and all other reviews will not print

SUBMITTING the Form

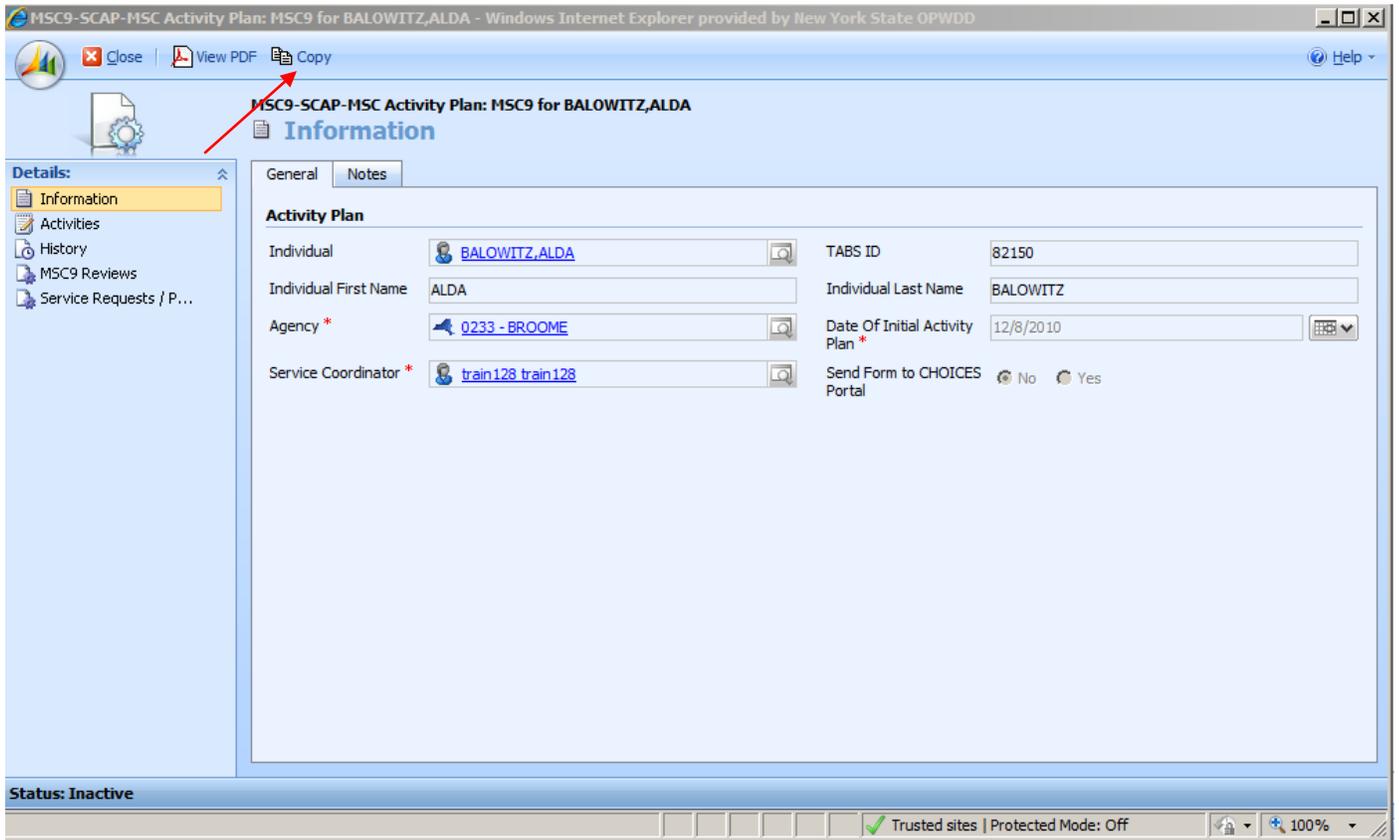
Once the MSC9 is completed and all required fields have been entered, the MSC9 is submitted. This form does not go into TABS and is not processed by the DDSO.



The form changes from Active to Inactive and is available for viewing within the Inactive list.

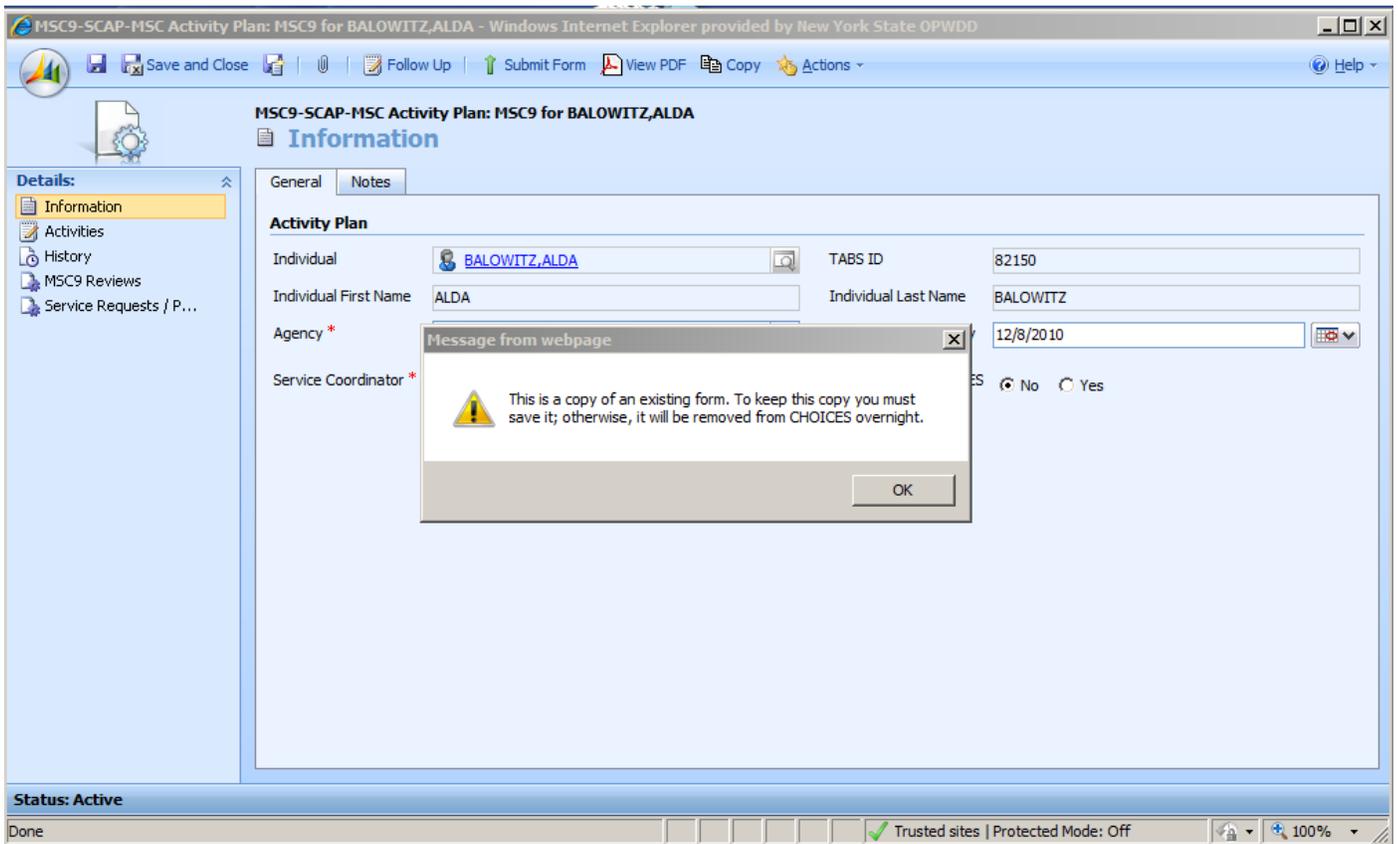


If the Service Coordinator needs to copy an existing MSC9, a completed MSC9 can be opened by double clicking on the individual's name (see above). The screen below appears, the Service Coordinator clicks on copy icon (see below).

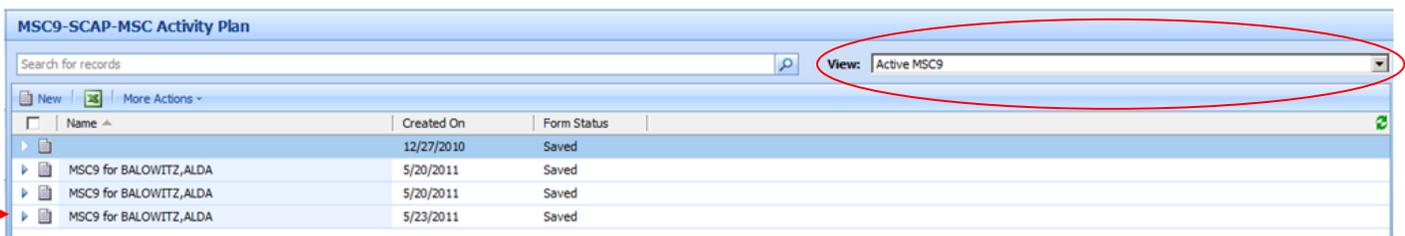


NOTE: MSC9 Reviews do not copy to the new form.

The system prompts the Service Coordinator that the copy has to be saved after created.



Service Coordinator clicks Ok, then clicks Save. From this point the Service Coordinator could make the changes to the copied MSC9 to update the information on this individual. Before submission a copy of the MSC9 would appear in the active view.



NOTE:

The final step for every form in CHOICES is to Submit the form. A form will not be completed or processed until it is Submitted.

