

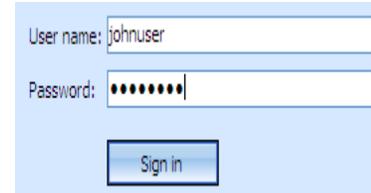
# CHOICES Quick Reference for Voluntary Providers

## Signing In

1. From your desktop, **double-click Internet Explorer icon:**  (Please use version 7.0, 8.0 or 9.0)
2. At top-left of screen, in the “Address box,” type <https://choices.opwdd.ny.gov> and click the **Enter** key.
3. The first time you sign in to CHOICES, you will be prompted to choose the realm in which you’ll be working. For a voluntary role, select “Non OPWDD Employees”, and then click “Continue to Sign In”.



4. Voluntary Agency staff: Type your **username**
5. Type your password in the password field and click **Sign In**.
6. The CHOICES main screen displays:



## Notes:

**INFORMATION AVAILABLE TO YOU:** You can only view information in CHOICES depending on what role you have been assigned in the system.

**CHOICES DOWNTIMES:** 9:00pm – 10:00pm every night, and Every 3<sup>rd</sup> Friday of every month from 6:00pm – 11:00pm.

**MONITOR RESOLUTIONS:** The DDP2 electronic form might not “fit” on the monitor screen making certain fields difficult to open. Check with your IS Department for assistance in modifying your monitor resolutions.

## Workplace (Left Pane)

- **My Work** Includes the **Announcements** section where any downtime for CHOICES will be reported.
- **People** Includes the **Individuals** section that is the easiest way to complete a form for someone that is known to TABS.
- **Agencies** Includes sections where you can view **Agencies** and **Programs**.
- **Forms** Area to view different **Forms** available in CHOICES.

## Form Toolbar

-  **Save** to save the form you are working on, keeping it open.

-  **Save and Close** will Save and then Close the form you are working on.
-  **Submit Form** Submits the form you are working on.
-  **View PDF** opens a PDF version of the form you are working on. This should look like the current paper form.
-  **Copy** is a Copy Forward feature that will make an editable version of a Saved or Submitted Form.

**Note:** When using “Copy”, ensure that any information that needs to be updated is changed before submitting the form.

## Individual Inquiry – Master Client History

1. From the Individuals screen, click Individual Inquiry under the Details section on the left-hand side. 
2. This will open the Master Individual History. This information is pulled directly from TABS.

## Form Status (Using DDP1 as an example)

View:

- **Saved** DDP1 is Saved but not yet Submitted in CHOICES.
- **Submitted** DDP1 is Submitted in CHOICES, where it enters a queue for DDSO approval.

View:

- **Approved** DDP1 is Processed and Approved by the DDSO in CHOICES.
- **Returned** DDP1 has been Returned by the DDSO in CHOICES. Check the **Notes** section to view why.
- **Rejected** DDP1 was Rejected by the DDSO.

## Closing and Signing Out of CHOICES

1. You can close out of any screen by clicking the X in the top right-hand corner. 
2. To Sign Out of CHOICES click the Sign Out link on the Main CHOICES screen. 

## Other Useful Information

CHOICES Step by Step Documentation can be found at:  
[http://www.pwdd.ny.gov/training/hp\\_choices\\_training.jsp](http://www.pwdd.ny.gov/training/hp_choices_training.jsp)

**Naming convention:** Last Name\_First Name\_TABSID\_Document Year\_Month\_Day\_Type of doc (this means plan, evaluation, etc)

Example:      Boohay\_Stephen\_01234\_2012\_07\_01\_RHP      the RHP means Res Hab Plan