



Office for People With Developmental Disabilities

CCO2 Disenrollment & Transfer Form CCO User Guide

CCO2 Disenrollment/Transfer Form

(The personal information and accompanying data shown in this guide are fictional and are used for illustrative purposes only.)

The purpose of this form is for a CCO to dis-enroll or transfer a person currently being served by their organization.

The *Transfer* option is for any movement within the same CCO, even to another DDSO program within that CCO.

Disenrollment is to remove the person from the CCO. Currently there are nine disenrollment reasons, of which two will need to be submitted to the DDRO for processing. The other reasons will not have any DDRO involvement and directly file to TABS.

The CHOICES roles that will have access to this form are the following:

CCO Supervisor – Create, edit and submit

CCO Level 2 – Read only

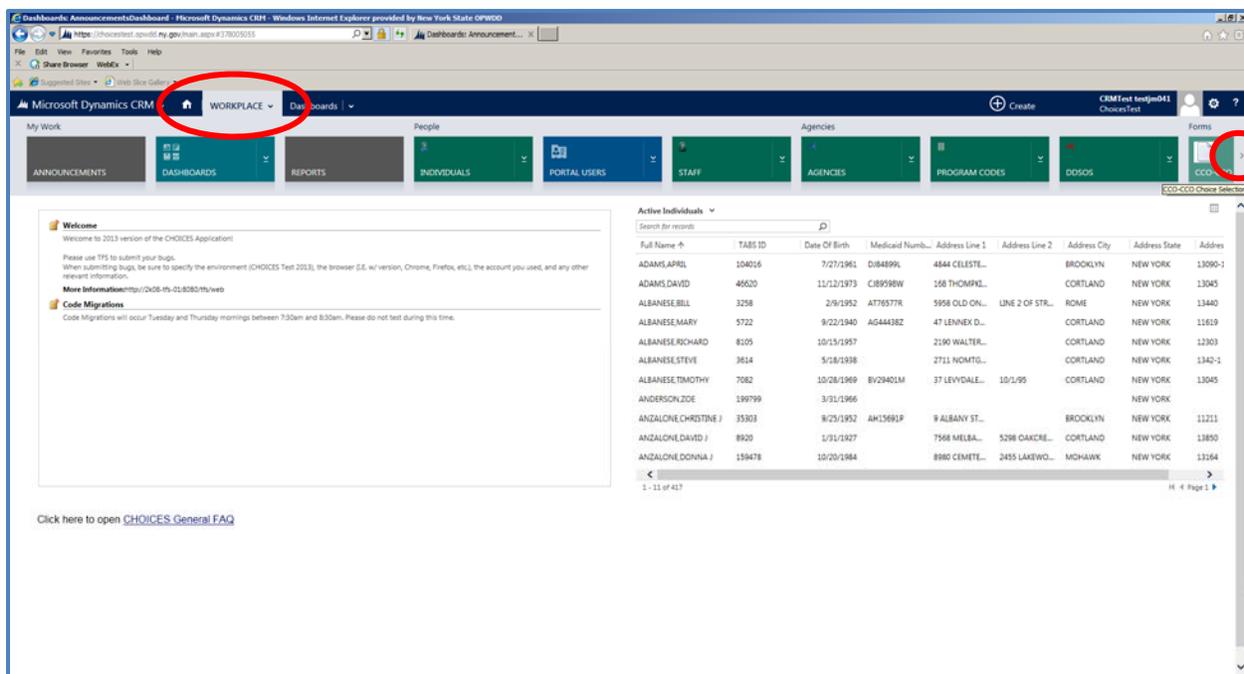
CCO Level 1 – Read only

Agency Compliance Officer – Read only

CCO2 Enrollment Form Section

From the main CHOICES Screen, click, **Workplace**, to display the sub-sections of CHOICES.

Scroll over the tiles, or click the “right” direction arrow, till the CCO2 tile displays, click on the tile to display the CCO2 subsection.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'WORKPLACE', and 'Dashboards'. The 'WORKPLACE' tab is highlighted with a red circle. Below the navigation bar, there are several tiles for 'ANNOUNCEMENTS', 'DASHBOARDS', 'REPORTS', 'INDIVIDUALS', 'PORTAL USERS', 'STAFF', 'AGENCIES', 'PROGRAM CODES', 'DDSOs', and 'CCO2'. The 'CCO2' tile is highlighted with a red circle. The main content area displays a 'Welcome' message and a table of 'Active Individuals'.

Full Name	TABS ID	Date Of Birth	Medicaid Num...	Address Line 1	Address Line 2	Address City	Address State	Address
ADAMS,APRIL	104016	7/27/1961	D84899L	4844 CELESTE...		BROOKLYN	NEW YORK	13060-1
ADAMS,DAVID	46620	11/12/1973	C189598W	158 THOMPKN...		CORTLAND	NEW YORK	13045
ALBANESE,BILL	3258	2/9/1952	AT76377R	5958 OLD ONL...	LINE 2 OF STR...	ROME	NEW YORK	13440
ALBANESE,MARY	5722	9/22/1940	AG44438Z	47 LENEX D...		CORTLAND	NEW YORK	11659
ALBANESE,RICHARD	8105	10/15/1957		2190 WALTER...		CORTLAND	NEW YORK	12303
ALBANESE,STEVE	3614	5/18/1938		2711 NOMTG...		CORTLAND	NEW YORK	1342-1
ALBANESE,TIMOTHY	7082	10/28/1969	BV29401M	37 LEVYDALE...	10/1/95	CORTLAND	NEW YORK	13045
ANDERSON,ZOE	139799	3/31/1966					NEW YORK	
ANZALONE,CHRISTINE	35303	8/25/1952	AH15691F	9 ALBANY ST...		BROOKLYN	NEW YORK	11211
ANZALONE,DAVID	8920	1/31/1927		7568 MELBA...	5288 OAKCRE...	CORTLAND	NEW YORK	13850
ANZALONE,DONNA	159478	10/20/1984		8980 CEMETE...	2455 LAKEWO...	MOHAWK	NEW YORK	13154

Views and Sorting

The default view is to the “Active” list. Within this list, both, Saved and Submitted, forms will display.

The user can change the *View*. Click on the down arrow to next to the current view to display all *System Views* available.

TABS ID	Current TABS Program Code	Current Program DSO	Reason for Withdraw...	Modified On	Status Reason
201857	66060072 -- H HOME 0261 ADVANC...	CENTRAL NEW YORK DSO		6/30/2018	6/15/2018 9:35 AM Submitted
198325	66060072 -- BASIC 0261 ADVANCE C	CENTRAL NEW YORK DSO		6/30/2018	6/21/2018 4:55 PM Submitted
201796	50060072 -- BASIC 0235 ADVANCE C	BROOKLYN DSO		6/30/2018	6/21/2018 9:55 AM Submitted
201796	50060072 -- BASIC 0235 ADVANCE C	BROOKLYN DSO		7/31/2018	7/16/2018 3:52 PM Submitted
200879	66060072 -- H HOME 0261 ADVANC...	CENTRAL NEW YORK DSO		7/18/2018	7/18/2018 1:47 PM Submitted

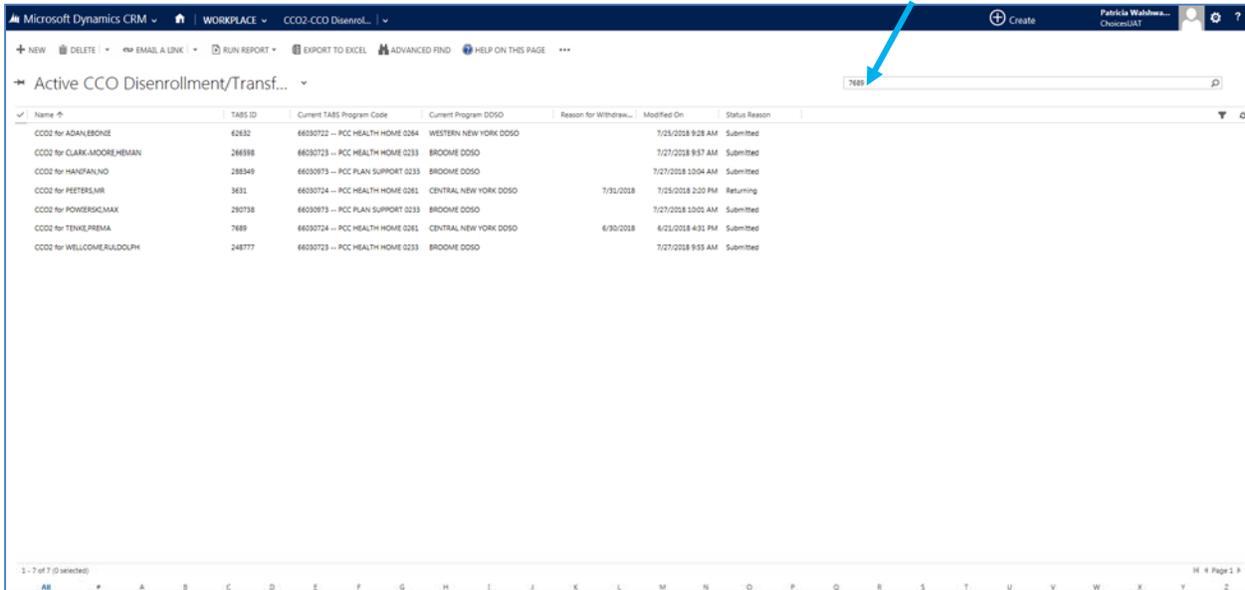
By clicking on the, *Inactive CCO*, the list displays all inactive forms. See “Form Statuses” Section on the meanings of Active and Inactive.

Each column on this or any list has a column header, which can be used to sort the list. Hover over the header to highlight, then click to sort.

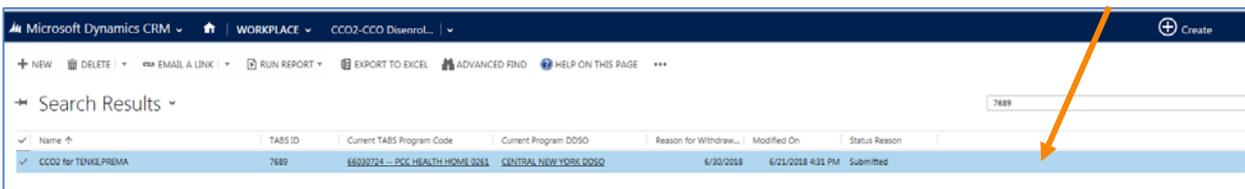
Name	TABS ID	Current TABS Program Code	Current Program DSO	Reason for Withdraw...	Modified On	Status Reason
CCO2 for WILLINGHAM,GUY	196730	66060072 -- H HOME 0261 ADVANC...	CENTRAL NEW YORK DSO		7/18/2018 3:07 PM	Processed
CCO2 for SHARPS,BABY	200173	50060072 -- H HOME 0235 ADVANC...	BROOKLYN DSO	7/31/2018	7/18/2018 1:25 PM	Processed
CCO2 for TESTCCO,CABBY	202129	50060072 -- H HOME 0235 ADVANC...	BROOKLYN DSO	7/31/2018	7/18/2018 1:23 PM	Processed
CCO2 for NEWTON202422,GUY	202422	50060072 -- H HOME 0235 ADVANC...	BROOKLYN DSO	7/31/2018	7/18/2018 1:20 PM	Processed
CCO2 for TESTCCO,DANNY	202130	50060072 -- H HOME 0235 ADVANC...	BROOKLYN DSO	7/31/2018	7/18/2018 1:16 PM	Processed
CCO2 for BAKER202723,CCO	202723	50060072 -- H HOME 0235 ADVANC...	BROOKLYN DSO	7/31/2018	7/18/2018 1:13 PM	Processed
CCO2 for DOE,LESLIE	201779	66060072 -- H HOME 0261 ADVANC...	CENTRAL NEW YORK DSO	7/31/2018	7/18/2018 1:07 PM	Returned
CCO2 for FLETCHER,KEVIN H	198029	66060097 -- BASIC 0261 ADVANCE C	CENTRAL NEW YORK DSO	7/31/2018	7/18/2018 1:06 PM	Returned

To Search for a Specific Individual

Within the CCO2 sub-section, only the Active list, has search capabilities. Enter either the person's name or TABS ID into the "search for records box" and click, Enter.



The results display. To open the record, hover to highlight, then double click on the line.



Form Statuses

All forms in CHOICES have 2 types of statuses, *Active* or *Inactive* and then the *form status*, noted as *Status Reason*.

Active statuses for the CCO2 form are:

1. Saved – A saved form can be opened, edited and then saved or submitted.
2. Submitted – A submitted form has been queued to the DDRO. The form cannot be edited by the CCO user.
3. Returning – The DDRO is returning the form and until the return process is completed, the form may display as, Active, Returning.

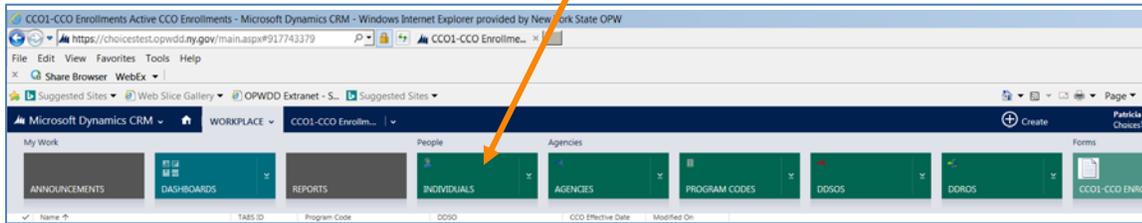
Inactive statuses for the CCO2 form are:

1. Processed – this form has been submitted and filed to TABS.
2. Returned – the DDRO has returned the form and a note as to why will be included

3. Denied – the DDRO is denying the request.

How to Create and Submit the Form

Go to the Individuals section to locate the person's record. Search for and then open the person's record.



At the person's record go to the CCO2 CCO Disenrollment/Transfer sub-section, click on the "+ Add New CCO2..."

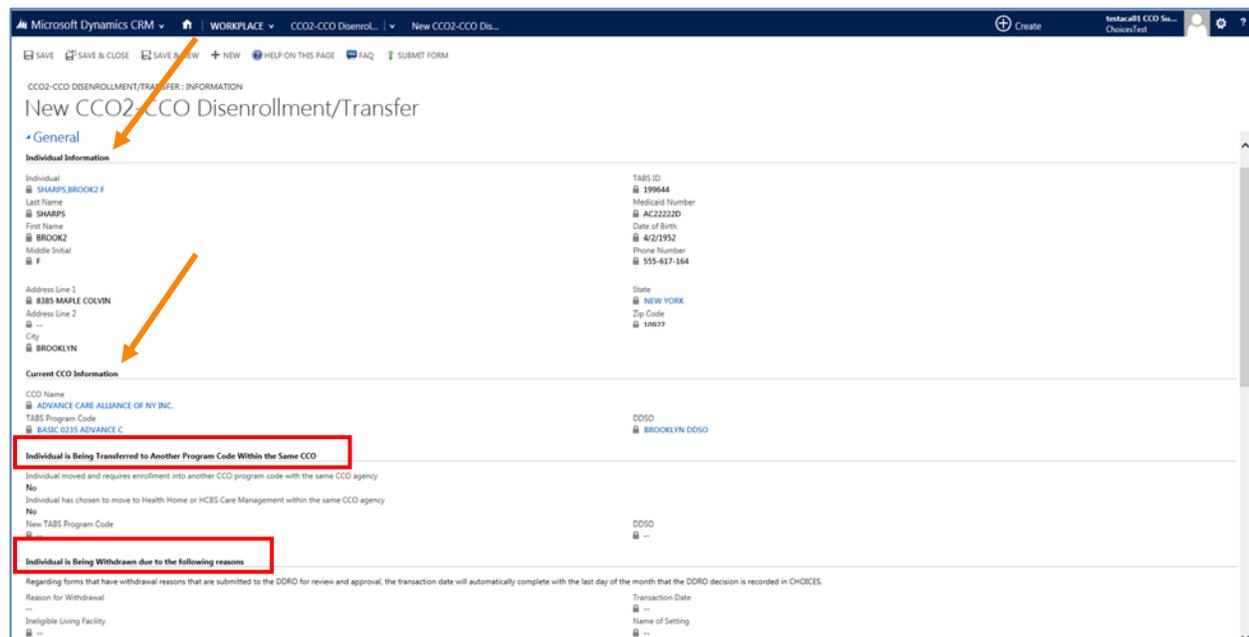


The form will load with the person's demographic and the Agency (CCO)'s information. No fields will initially display as required.

Only when the user selects an option in either the Transfer or Withdrawn section, will any fields that are required for that specific option display with the red asterisk.

All required fields must be completed prior to saving or submitting the form.

Any field with a lock is not available to the user to complete.



Transfer Options

The transfer section has two options.

1. *Individual moved and requires enrollment into another CCO program code with the same CCO agency.*

This option is only for a person who has moved outside of the catchment area for the current program code. Each CCO program code is affiliated with a specific DDSO and the DDSO is affiliated with specific counties. Therefore, the person must reside in a county served by the program code.

Example: Brook lives in Warren County and the current program is affiliated with Capital District DDSO. But then Brook moves to Rockland County. Brook's current CCO serves both counties so the CCO can transfer Brook to the appropriate program code (Health Homes or Basic HCBS Plan Support) in the new DDSO, Hudson Valley.

2. *Individual has chosen to move to Health Home or Basic HCBS Plan Support.*

This option is to change the program type for the person. The person would be moving from their current Health Homes program code to Basis HCBS Plan Support (or vice a versa) in the same CCO in the same DDSO.

The user must choose which is the appropriate option by changing the “No” to a “Yes”.

CCO2 for SHARPS,BROOK2 F

Current CCO Information

CCO Name
ADVANCE CARE ALLIANCE OF NY INC.
TABS Program Code
50060097 -- BASIC 0235 ADVANCE C

DDSO
BROOKLYN DDSO

Individual is Being Transferred to Another Program Code Within the Same CCO

Individual moved and requires enrollment into another CCO program code with the same CCO agency
No

Individual has chosen to move to Health Home or HCBS Care Management within the same CCO agency
No

New TABS Program Code
--

DDSO
--

Note: There could be a scenario where a person is physically moving and at the same time is changing their program type, so both options can be marked as “Yes”.

Reminder: if a person is moving please complete a DDP1, Demographic Change for the new address.

Then, the *TABS Program Code* field displays with the Look Up icon at the end. Click the icon to display the CCO's list of program to make a selection.

Individual is Being Transferred to Another Program Code Within the Same CCO

Individual moved and requires enrollment into another CCO program code with the same CCO agency
No

Individual has chosen to move to Health Home or HCBS Care Management within the same CCO agency
Yes

New TABS Program Code *

DDSO
--

Once the TABS Program Code is selected the corresponding DDSO will automatically complete.

New TABS Program Code*
 50060072 -- H HOME 0235 ADVANCE C
 DDSO
 BROOKLYN DDSO

If necessary, the user can “Save” or “Save & Close” the form and return later to submit.

Microsoft Dynamics CRM | WORKPLACE | CCO2-CCO Disenrol... | CCO2 for SHARPS,B... | Create | testaca01 CCO Su... | ChoicesTest

SAVE SAVE & CLOSE SAVE & NEW NEW DELETE EMAIL A LINK RUN REPORT

CCO2-CCO DISENROLLMENT/TRANSFER : INFORMATION
 CCO2 for SHARPS,BROOK2 F

Individual is Being Withdrawn from CCO services

Microsoft Dynamics CRM | WORKPLACE | CCO2-CCO Disenrol... | CCO2 for SHARPS,B... | SAVE SAVE & CLOSE SAVE & NEW NEW DELETE EMAIL A LINK RUN REPORT

CCO2-CCO DISENROLLMENT/TRANSFER : INFORMATION
 CCO2 for SHARPS,BROOK2 F

Individual is Being Transferred to Another Program Code Within the Same CCO
 Individual moved and requires enrollment into another CCO program code with the same CCO agency
 No
 Individual has chosen to move to Health Home or HCBS Care Management within the same CCO agency
 No
 New TABS Program Code
 DDSO

Individual is Being Withdrawn due to the following reasons
 Regarding forms that have withdrawal reasons that are submitted to the DDRO for review and approval, the transaction date will automatically complete with the last day of the month that the DDRO decision is recorded in CHOICES.
 Reason for Withdrawal
 Transaction Date
 Ineligible Living Facility
 Name of Setting

Submission Information
 CCO Contact
 testaca01 CCO Supervisor
 CCO Contact's Electronic Signature
 CCO Contact Phone Number
 518-555-5555

DDRO Processing
 DDRO Reviewer
 For **voluntary withdrawals only**: I verified that the individual requesting to be withdrawn from CCO Health Homes or HCBS Care Management made this decision and understands all impacts to their services and care coordination
 DDRO Determination
 Transaction Date

Currently there are nine reasons for a person to be withdrawn from a CCO.

Reason for Withdrawal

- Individual is deceased
- Individual is no longer enrolled in Medicaid
- Individual is now permanently residing in an ICF/MR or ICF/DD, a nursing facility or another non-qualifying setting
- Individual is enrolled in another Medicaid funded care management program
- Individual does not meet Level of Care
- Individual moved out of state
- Individual has chosen another CCO
- Individual moved out of catchment area and needs to be served by a different CCO agency
- The individual has chosen to no longer receive any care management from any provider

Withdrawal Reasons and Functionality

Depending on the reason for the withdrawal, different fields will be required and different functionality will occur in filing the withdrawal date.

For the following two reasons, the form will be submitted to the DDRO for approval and processing. The Transaction Date field will not be available to the user but will auto-complete for the last day of the month that the DDRO approves the withdrawal.

- Individual does not meet Level of Care
- The individual has chosen to no longer receive any care management from any provider

For the following three reasons, a transaction date will be necessary and the *Transaction Date* field will be enabled and required. The removal date from the CCO will be the transaction date completed on the form. The form will file that date directly to TABS for processing.

- Individual is deceased.
- Individual is no longer enrolled in Medicaid
- Individual is now permanently residing in an ICF/MR or ICF/DD, a nursing facility or another non-qualifying setting

And for “Individual is now permanently residing in an ICF/MR or ICF/DD, a nursing facility or another non-qualifying setting,” the user must complete the, *Ineligible Living Facility*, field. If “Other” is chosen for the new living facility, the user must type in the setting.

Individual is Being Withdrawn due to the following reasons	
Regarding forms that have withdrawal reasons that are submitted to the DDRO for review and approval, the transaction date will automatically complete with the last day of the month that the DDRO decision is recorded in CHOICES.	
Reason for Withdrawal	Transaction Date *
Individual is now permanently residing in an ICF/MR or ICF/DD, a nursing facility or another non-qualifying setting	7/10/2018
Ineligible Living Facility *	Name of Setting *
Other	Something Setting

For the following four reasons, the *Transaction Date* field will auto complete with the last day of the month that the form is being completed or submitted.

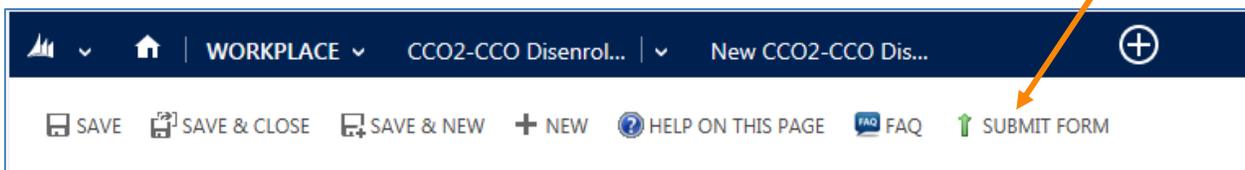
(If the form is completed but then saved and not submitted till the following month, which could be only one day, the Transaction Date field will change to that current month’s last day.)

Therefore, the removal date from the CCO will be the transaction date. The forms will file directly to TABS for processing and pend till the last day of the month.

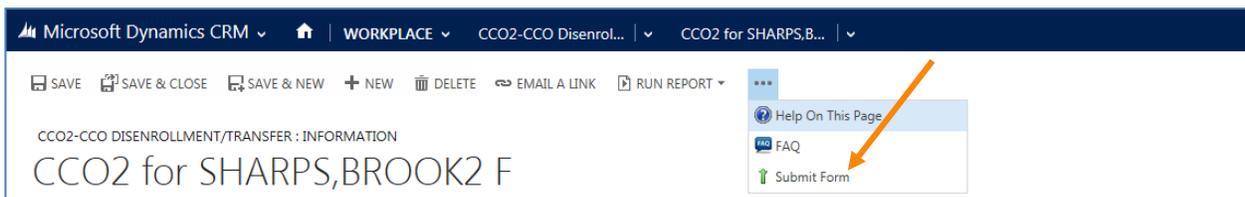
- Individual is enrolled in another Medicaid funded care management program
- Individual moved out of state
- Individual has chosen another CCO
- Individual moved out of catchment area and needs to be served by a different CCO agency

How to Submit the Form

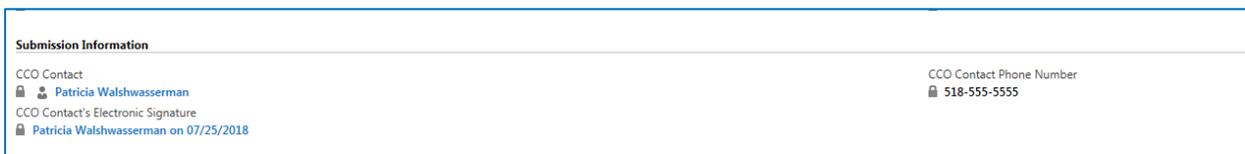
If the form has not been saved, the “Submit Form” icon is visible at the top of the form on the command line.



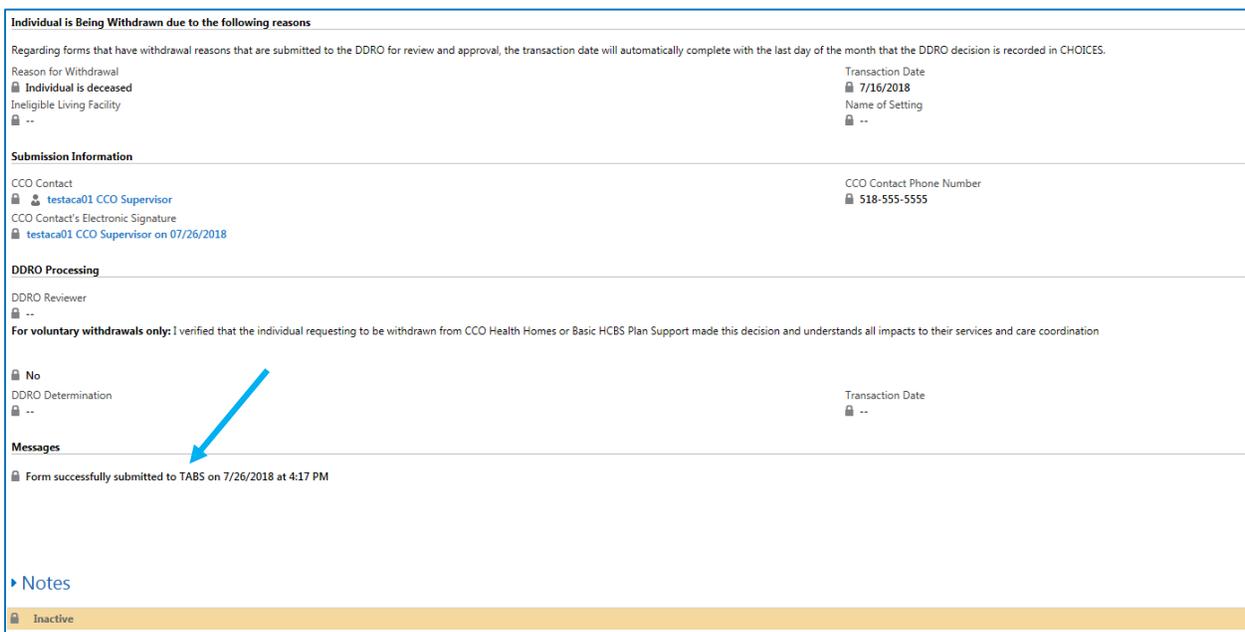
If the form had been saved before needing to submit, then, at the top of the form, click the 3 dots to display more functions, including the “Submit Form.”



The CCO2 requires the submitter to sign the form. The signature page will display after the user clicks, Submit. The form will then complete with the electronic signature.

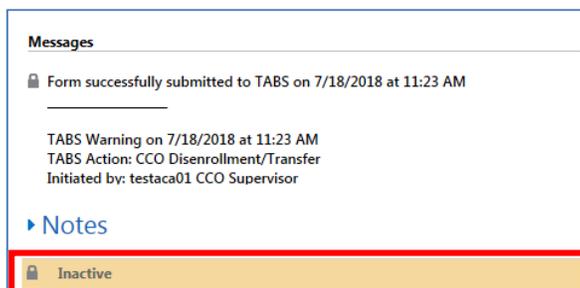


Once the form has been submitted, the user must wait until the form has completed processing to TABS to read if the form successfully submitted to TABS.



Note: An exception to forms getting a TABS message are any forms that require the DDSO to review and process. These forms will remain “Active” till the DDSO completes its processing.

For withdrawal reasons with a Transaction Date, “the last day of the month”, a TABS Warning message will also display.

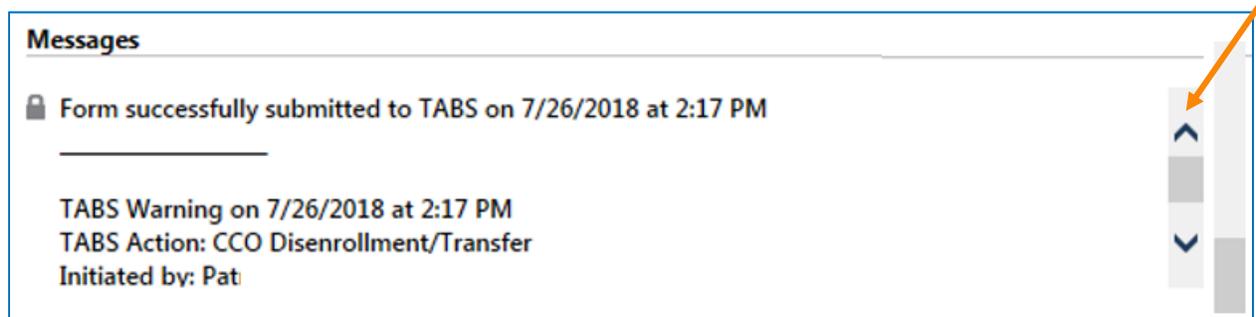


Finally, the form becomes “Inactive,” indicating that no further action by either CCO or DDROs is necessary.

TABS Messages

The first line of the message box will note if the form’s submission was successful or not. The subsequent “Warning” messages are critical to read and if necessary correct the form or the person’s record to ensure the disenrollment will occur the last day of the month.

To view the whole message, use the scroll bar at the end of the message box, not the form’s scroll bar.



“The attempted REMOVE will be filed as PENDING ...” is a valid message, for all reasons listed on page 8, where the Transaction Date field auto completed as the last day of the month.

