



**Office for People With  
Developmental Disabilities**

CHOICES LCED Date Transmittal Form  
CCO User Guide

## LCED Date Transmittal 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 to record and file the LCED Effective/Review Date to TABS. The form will be used by both DDRO staff to file the Initial LCED Effective Date and CCO staff to file the Annual Recertification (Review) Date.

CCO CHOICES Roles that have access to this form are:

CCO Supervisor – Create, edit and submit

CCO Level 2 - Create, edit and submit

CCO Level 1 – Read only

Agency Compliance Officer – Read only

## LCED Date Transmittal 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 *LCED Date Transmittal* tile displays, click on the tile.

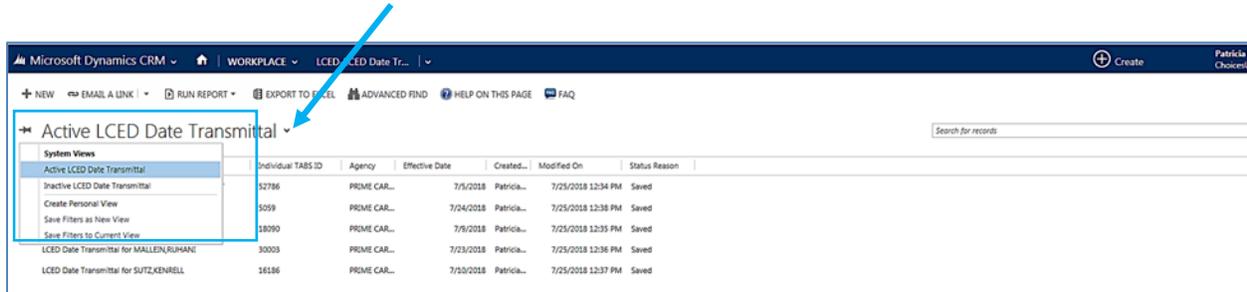
The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'WORKPLACE' and 'Dashboards'. The 'WORKPLACE' menu is circled in red. Below the navigation bar, there are several tiles for 'My Work', 'People', 'Agencies', and 'Forms'. The 'CCO' tile in the 'Forms' section is circled in red. Below the tiles, there is 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	D04899L	4844 CELESTE...		BROOKLYN	NEW YORK	13090-1
ADAMS, DAVID	46520	11/12/1973	C189598W	168 THOMPKN...		CORTLAND	NEW YORK	13045
ALBANESE, BILL	3258	2/9/1952	A776577R	9958 OLD ON... LINE 2 OF STR...		ROME	NEW YORK	13440
ALBANESE, MARY	5722	9/22/1940	AG44438Z	47 LENEX D...		CORTLAND	NEW YORK	11619
ALBANESE, RICHARD	8105	10/15/1957		2190 WALTER...		CORTLAND	NEW YORK	12303
ALBANESE, STEVE	3814	5/18/1938		2711 NOMTGS...		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 J	35303	8/25/1952	AH15693P	9 ALBANY ST...		BROOKLYN	NEW YORK	11221
ANZALONE, DAVID J	8920	1/31/1927		7568 MELBA... 5298 OAKCRE...		CORTLAND	NEW YORK	13850
ANZALONE, DONNA J	159478	10/20/1984		8980 CEMETE... 2455 LAKEWO...		MOHAWK	NEW YORK	13164

## Views and Sorting

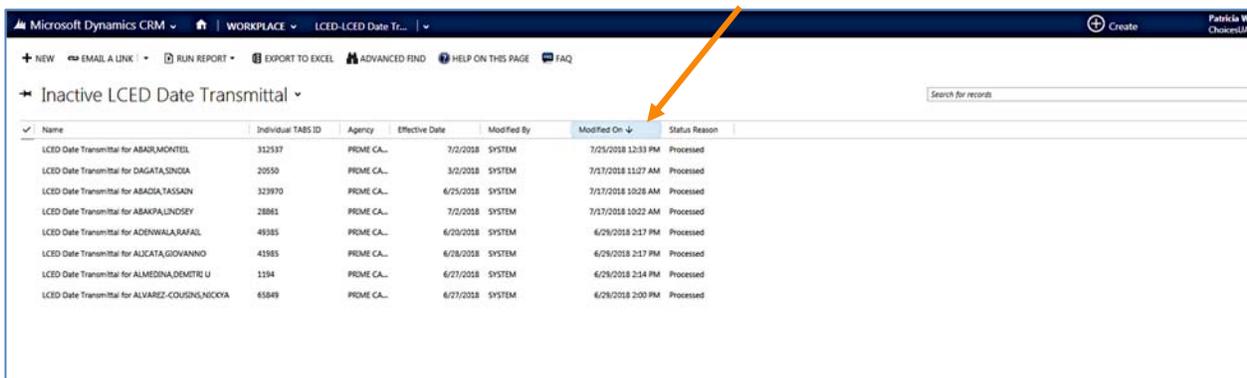
The default view is to the “Active” list. All, Saved, forms will display on this list.

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



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

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



## 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 LCED form are:

1. Saved – A saved form can be opened, edited and then saved or submitted.

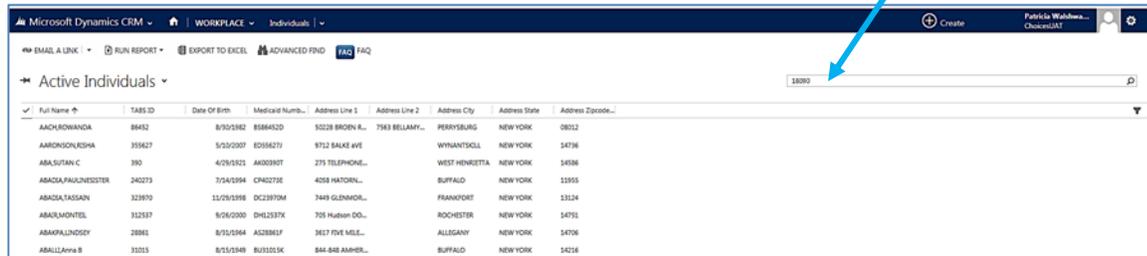
Inactive status for the LCED form is:

1. Processed – this form has been submitted and filed to TABS.

## How to Create and Submit the Form

To create an LCED Date Transmittal form, go to the person's record.

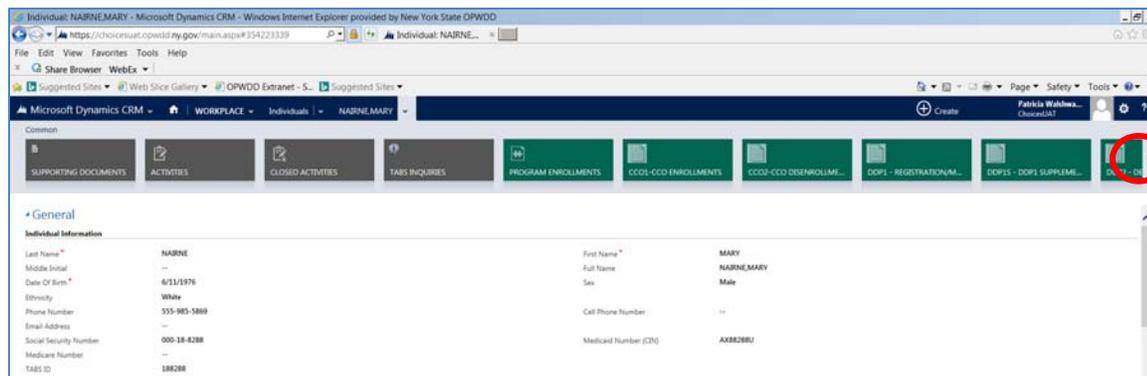
At the *Individuals* subsection, enter the person's name or TABS ID into the, Search for records, box and then click, Enter.



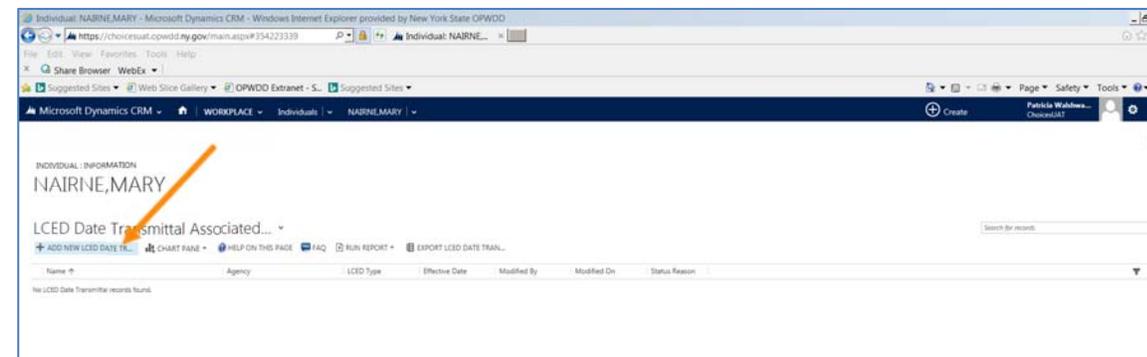
The results display. To open the record, hover to highlight, then double click on the line.



At the person's record, scroll through the subsections until the LCED Date Transmittal section displays.



At the LCED Date Transmittal section, click on the "+ Add New LCED Date..."



The form will load with the person's demographic and the Agency (CCO)'s information.

All fields with a red asterisk \* are required even to initially save the form. Any field with a lock is not available to the user to complete.

Microsoft Dynamics CRM - WORKPLACE - LCED-LCED Date Tr... - New LCED Date Tra...  
SAVE SAVE & CLOSE SAVE & NEW + NEW HELP ON THIS PAGE FAQ PROCESS FORM  
LCED DATE TRANSMITTAL : INFORMATION  
New LCED Date Transmittal  
Individual Lookup  
General  
Individual Information  
Individual \*  
NAIRNE, MARY  
Last Name  
NAIRNE  
TABS ID \*  
188288  
First Name  
MARY  
Level of Care Information  
LCED Effective/Review Date \*  
LCED Type \*  
Submission Information  
Agency \*  
PRIME CARE COORDINATION, LLC  
Submitted By  
--  
DDSO \*  
Transaction Date  
--  
Messages  
--  
Notes

Three fields, *LCED Effective/Review Date*, *LCED Type* and *DDSO*, need to be completed by the user to submit.

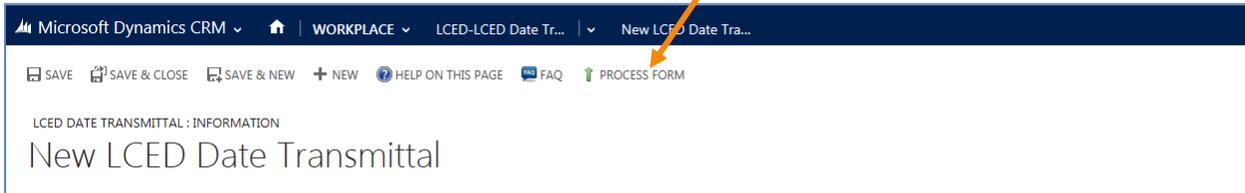
Hover over the field to highlight, then click to view the calendar, options or the Look Up icon.

Microsoft Dynamics CRM - WORKPLACE - LCED-LCED Date Tr... - New LCED Date Tra...  
SAVE SAVE & CLOSE SAVE & NEW + NEW HELP ON THIS PAGE FAQ PROCESS FORM  
LCED DATE TRANSMITTAL : INFORMATION  
New LCED Date Transmittal  
Individual Lookup  
General  
Individual Information  
Individual \*  
NAIRNE, MARY  
Last Name  
NAIRNE  
TABS ID \*  
188288  
First Name  
MARY  
Level of Care Information  
LCED Effective/Review Date \*  
7/25/2018  
LCED Type \*  
Annual Recertification  
Submission Information  
Agency \*  
PRIME CARE COORDINATION, LLC  
Submitted By  
--  
DDSO \*  
BROOME DDSO  
Transaction Date  
--  
Messages  
--

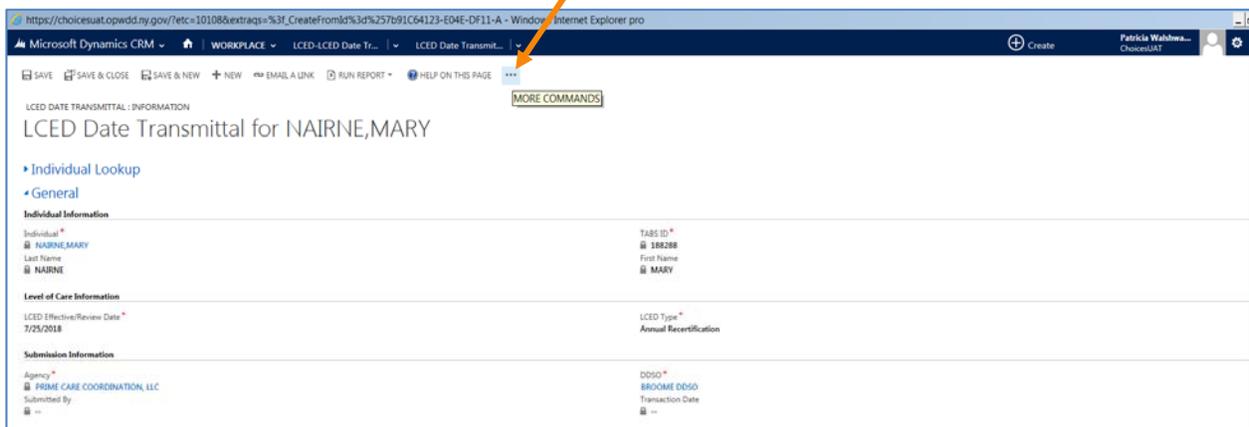
If necessary, the user can “Save” or “Save & Close” the form and return later to process.

## How to Submit the Form

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

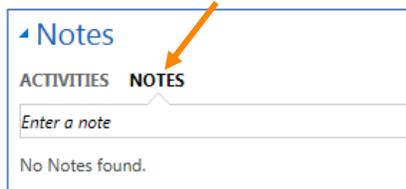


If the form had been saved before needing to submit for Processing, then, at the top of the form, click the 3 dots to display more functions, including “Process Form.”



## Enter a Note

At the bottom of the form is a Notes section, click on the word, NOTES, to activate.



Type in the note, then click “Done”. Notes cannot be deleted or edited, once the user leaves the note box, even without clicking “Done.”

The note will remain and no editing is allowed. User name and date are automatically added.



Once the form has been submitted the user must wait till the form has completed processing to TABS. A yellow line displays at the bottom of the form with “Inactive” noted.

The user must read the Message to know if the form processed successfully to TABS.

Microsoft Dynamics CRM - WORKPLACE - LCED-LOCED Date Tr... - LCED Date Transmittal... - Create - Patricia Walsh... - ChosenMAT

NEW | EMAIL A LINK | RUN REPORT | HELP ON THIS PAGE | FAQ

LCED DATE TRANSMITTAL : INFORMATION  
LCED Date Transmittal for NAIRNE, MARY

Individual Lookup  
General

Individual Information

Individual * NABINE, MARY Last Name NABINE	TABS ID * 188288 First Name MARY
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Level of Care Information

LCED Effective/Review Date * 7/25/2018	LCED Type * Annual Recertification
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Submission Information

Agency * PRIME CARE COORDINATION, LLC Submitted By Patricia Walshwasserman	DDSO * BROOME DDSO Transaction Date 7/25/2018
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Messages

- Form successfully submitted to TABS on 7/25/2018 at 4:29 PM

Notes

ACTIVITIES NOTES

All - | Add Phone Call | Add Task | ...

We didn't find any activity records.

Inactive

## TABS Messages

The first line of the message box will note if the form’s submission was successful.

But if the form did not submit successfully, a message will display with the problem to be corrected.

The message below is due to the user putting in a *future date* for the Review Date. Future dates are not allowed. To correct, the user only needs to fix the date and then click “Process form”.

Form submission attempted at 7/26/2018 10:21 AM, by Patricia Walshwasserman.  
The form was found to be invalid for submission for the following reason: The LOC Date (Review Date) is in the future. This needs to be a date that has already occurred.  
If you cannot verify or make the suggested change before re-submitting, please contact the Help Desk.

If the user gets a technical error message, then the user should contact the help desk. Business process questions need to be addressed at the CCO or District Office.

## Refiling of a LCED Date Transmittal Form

A user can submit and resubmit a transmittal form as necessary. Such as, at the annual redetermination date or if a mistake was made in an earlier submitted transmittal and

needs to be corrected. Please use the Notes section if the form is resubmitted due to a mistake.