



Office for People With Developmental Disabilities

CCO1 Enrollment Form User Guide

CCO1 Enrollment Form

(Data in this guide is fake)

The purpose of this form is for a CCO to enroll a new person into their organization and into the appropriate program type, either Health Homes or Basic HCBS Plan Support.

Prior to completing the form, the CCO must ensure four specific requirements are met:

1. Person must be OPWDD Eligible
2. Person must have an LCED Effective Date on file that is less than 12 months old
3. Person must have active Medicaid on file with OPWDD
4. CCO must have a signed consent for the person enrolling

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

CCO1 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, until the **CCO1** tile displays, click on the tile to display the CCO1 subsection.

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'WORKPLACE' and 'Dashboards'. The main content area is divided into 'My Work' and 'Active Individuals'. The 'My Work' section contains tiles for 'ANNOUNCEMENTS', 'DASHBOARDS', 'REPORTS', 'INDIVIDUALS', 'PORTAL USERS', 'STAFF', 'AGENCIES', 'PROGRAM CODES', and 'DOSOS'. The 'Active Individuals' section displays a table with columns for Full Name, TABS ID, Date Of Birth, Medicaid Num..., Address Line 1, Address Line 2, Address City, Address State, and Address. A red circle highlights the 'CCO-CCO Choice Selection' tile in the top right corner of the interface.

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	D184896L	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	A176577R	5958 OLD ONL...	LINE 2 OF STR...	ROME	NEW YORK	13440
ALBANESE,MARY	5722	9/22/1940	A644438Z	47 LENNEX D...		CORTLAND	NEW YORK	11619
ALBANESE,RICHARD	8105	10/15/1957		2190 WALTER...		CORTLAND	NEW YORK	12303
ALBANESE,STEVE	3614	5/18/1938		2711 NOMTGT...		CORTLAND	NEW YORK	1342-1
ALBANESE,TIMOTHY	7082	10/08/1969	BV29401M	37 LEVYDALE...	10/1/99	CORTLAND	NEW YORK	13045
ANDERSON,ZOE	199799	3/31/1966					NEW YORK	
ANZALONE,CHRISTINE J	35303	8/25/1952	AH15691P	9 ALBANY ST...		BROOKLYN	NEW YORK	11211
ANZALONE,DAVID J	8920	1/31/1927		7568 MELBA...	5296 DAKCRE...	CORTLAND	NEW YORK	13850
ANZALONE,DONNA J	159478	10/20/1984		8880 CEMETE...	2435 LAKEWD...	MOHAWK	NEW YORK	13164

Views and Sorting

The default view is to the “Active” list. Within this list, Saved 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.

The screenshot shows the Microsoft Dynamics CRM interface for 'CCO1-CCO Enrollments'. The current view is 'Active CCO Enrollments'. A dropdown menu is open, showing 'System Views' with options: 'Active CCO Enrollments', 'Inactive CCO Enrollments', 'Create Personal View', 'Save Filters as New View', and 'Save Filters to Current View'. The main table displays a list of active enrollments with columns: Name, TABS ID, Program Code, DOSO, CCO Effective Date, and Modified On. An orange arrow points to the dropdown arrow next to the view name.

Name	TABS ID	Program Code	DOSO	CCO Effective Date	Modified On
CCO1 for MARS,CCO	202707	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/5/2018 12:58 PM
CCO1 for SHARPSB,CCO	202424	50060097 -- BASIC 0235 ADVANCE C	BROOKLYN DOSO	7/5/2018	6/11/2018 12:00 PM
CCO1 for BELLING, FIDAC	202975	50060072 -- H HOME 0235 ADVANCE...	BROOKLYN DOSO	7/5/2018	6/6/2018 3:18 PM
CCO1 for FLETCH, RESPON	201521	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/4/2018 9:52 AM
CCO1 for OTT, SEMP2	201531	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/4/2018 9:52 AM

By clicking on the, *Inactive CCO1*, the list displays all inactive forms. See “Form Statuses” Section on the meanings of Active and Inactive.

The screenshot shows the Microsoft Dynamics CRM interface for 'CCO1-CCO Enrollments'. The current view is 'Inactive CCO Enrollments'. The table displays a list of inactive enrollments with columns: Name, TABS ID, Program Code, DOSO, CCO Effective Date, Modified On, and Status Reason.

Name	TABS ID	Program Code	DOSO	CCO Effective Date	Modified On	Status Reason
CCO1 for MARS,CCO	202707	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/11/2018 12:52 PM	Processed
CCO1 for SHARPSB,CCO	202424	50060097 -- BASIC 0235 ADVANCE C	BROOKLYN DOSO	7/5/2018	6/11/2018 12:00 PM	Processed
CCO1 for BELLING, FIDAC	202975	50060072 -- H HOME 0235 ADVANCE...	BROOKLYN DOSO	7/5/2018	6/6/2018 3:18 PM	Processed
CCO1 for FLETCHER, ALEXIS	5580	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/6/2018 11:52 AM	Processed
CCO1 for KIDOTHRAFFALL, RAI	201646	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/4/2018 11:57 AM	Processed
CCO1 for OTT, SEMP2	201531	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/4/2018 9:52 AM	Processed

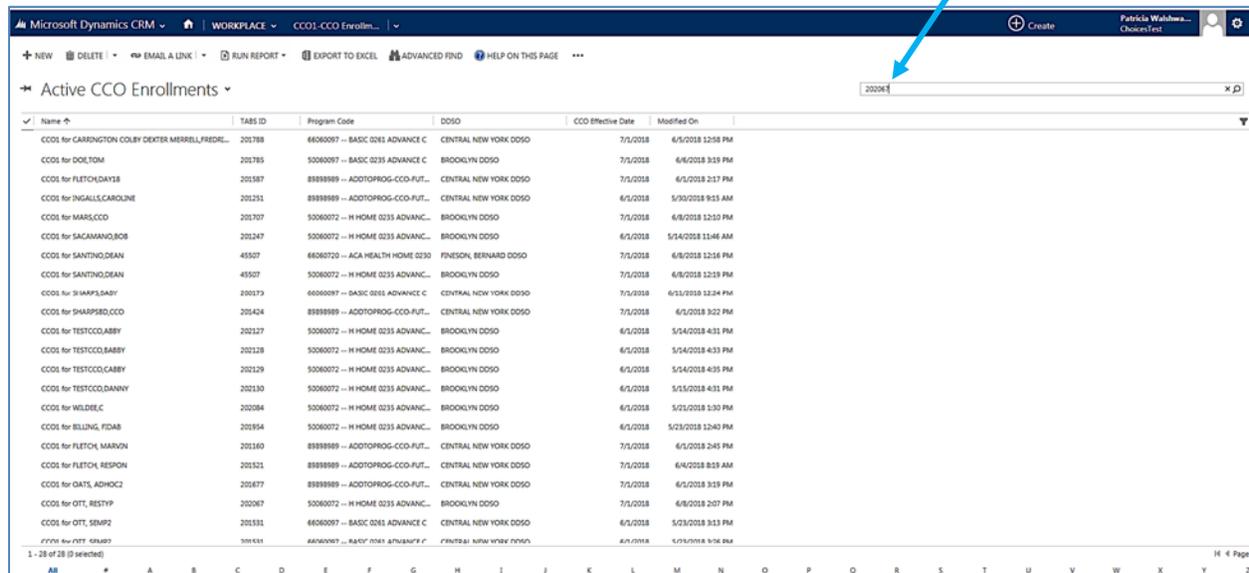
Each column on the list has a column header, which can be used to sort the list. Hover to highlight, then click to sort.

The screenshot shows the Microsoft Dynamics CRM interface for 'CCO1-CCO Enrollments'. The current view is 'Inactive CCO Enrollments'. An orange arrow points to the 'DOSO' column header, which is highlighted. The table displays a list of inactive enrollments with columns: Name, TABS ID, Program Code, DOSO, CCO Effective Date, Modified On, and Status Reason.

Name	TABS ID	Program Code	DOSO	CCO Effective Date	Modified On	Status Reason
CCO1 for SHARPSB,CCO	202424	50060097 -- BASIC 0235 ADVANCE C	BROOKLYN DOSO	7/5/2018	6/11/2018 12:00 PM	Processed
CCO1 for BELLING, FIDAC	202975	50060072 -- H HOME 0235 ADVANCE...	BROOKLYN DOSO	7/5/2018	6/6/2018 3:18 PM	Processed
CCO1 for OTT, SEMP2	201531	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/4/2018 9:52 AM	Processed
CCO1 for KIDOTHRAFFALL, RAI	201646	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/4/2018 11:57 AM	Processed
CCO1 for FLETCHER, ALEXIS	5580	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/6/2018 11:52 AM	Processed
CCO1 for MARS,CCO	202707	89898989 -- ADOTOPROG-CCO-FUT...	CENTRAL NEW YORK DOSO	7/5/2018	6/11/2018 12:52 PM	Processed

To Search for a Specific Individual

Within the CCO1 sub-section, for either the Active or Inactive list, enter the TABS ID into the “search for records box” and click, Enter.



The screenshot displays the Microsoft Dynamics CRM interface for the 'Active CCO Enrollments' section. A search box in the top right corner contains the value '202067'. A blue arrow points to this search box. Below the search box is a table with the following columns: Name, TABS ID, Program Code, DOSO, CCO Effective Date, and Modified On. The table contains 28 rows of data, with the first row being 'CCO1 for GARENGTON COLBY CENTER MERRELL, FRED...'. The bottom of the screen shows a navigation bar with letters A through Z and a page indicator '1 - 28 of 28 (3 selected) H 4 Page'.

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



The screenshot displays the Microsoft Dynamics CRM interface for the 'Search Results' section. A search box in the top right corner contains the value '202067'. An orange arrow points to the search box. Below the search box is a table with the following columns: Name, TABS ID, Program Code, DOSO, CCO Effective Date, Modified On, and Status Reason. The table contains one row of data: 'CCO1 for OTT, RESTYF' with TABS ID 202067, Program Code '50060072 -- H HOME 0233 ADVANC...', DOSO 'BROOKLYN DOSO', CCO Effective Date '7/1/2018', Modified On '6/8/2018 2:07 PM', and Status Reason 'Saved'. The bottom of the screen shows a navigation bar with letters A through Z and a page indicator '1 - 28 of 28 (3 selected) H 4 Page'.

Form Statuses

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

Active status for the Documentation Submission form is:

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

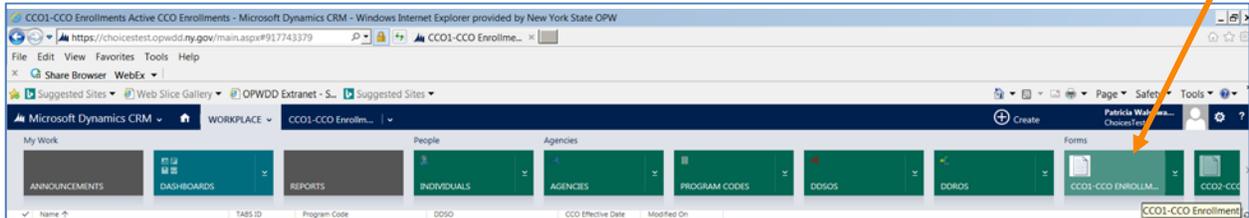
Inactive status for the CCO1 form is:

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

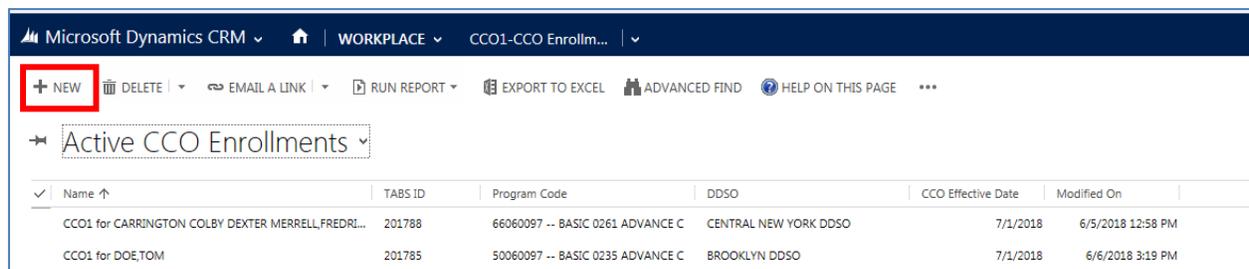
How to Create and Submit the Form

The person to be enrolled will not be known to the CCO in CHOICES, therefore they will not be on the “Individuals” list.

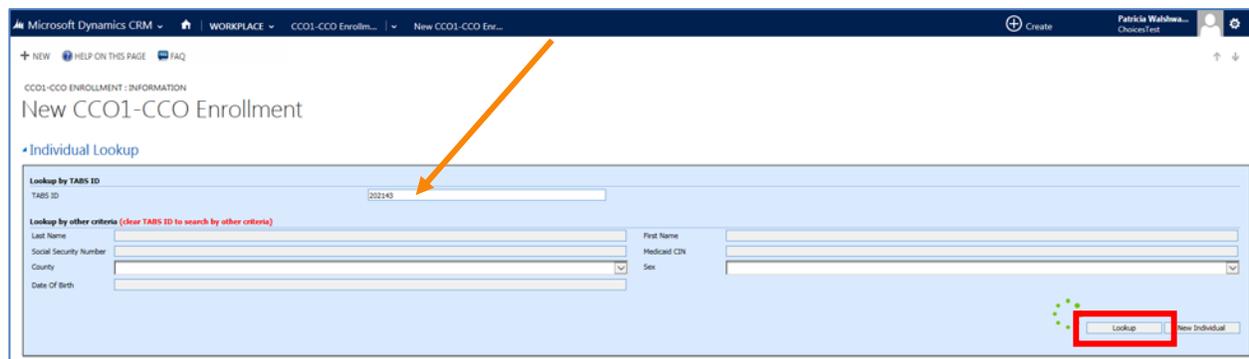
Go to the CCO1 sub-section under, [Workplace](#).



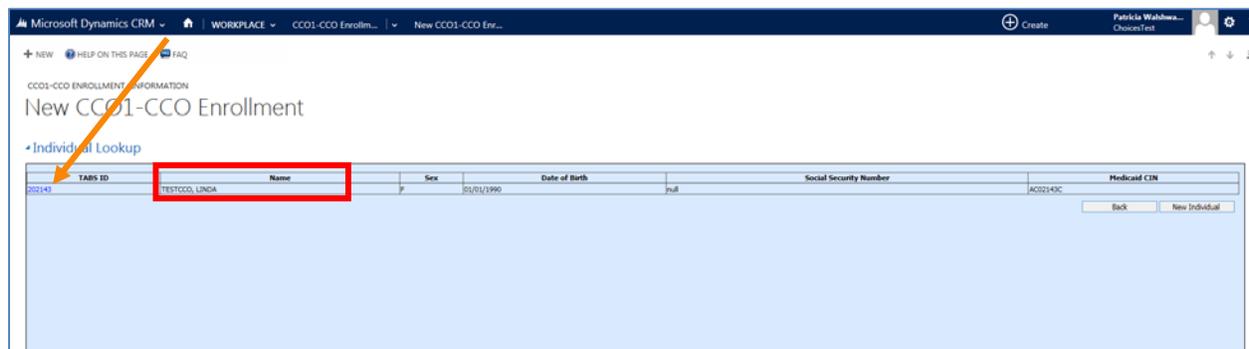
At the CCO1 section, click on the “+ New”



1. Enter the TABS ID of the person in the TABS ID box, then click Lookup.



2. The results will load, check the person’s name, if a match, click on the TABS ID number, which is a hyperlink to pull the information into the CCO1 form.



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 | CCO1-CCO Enrollm... | New CCO1-CCO Enr...

SAVE | SAVE & CLOSE | SAVE & NEW | NEW | HELP ON THIS PAGE | FAQ | SUBMIT FORM

CCO1-CCO ENROLLMENT - INFORMATION

New CCO1-CCO Enrollment

Individual Lookup

General

Individual Information

Individual
 --
 Last Name
 TESTCCO
 First Name
 LINDA
 Middle Initial
 --

Address Line 1
 MAIN ST
 Address Line 2
 --
 City
 TOWN

TABS ID
 202143
 Date of Birth
 1/1/1990
 Phone Number
 --
 Medicaid Number
 AC02149C

State
 NEW YORK
 Zip Code
 12345
 County of Residence
 KINGS

CCO Information

CCO
 ADVANCE CARE ALLIANCE OF NY INC.
 TABS Program Code
 --

DDSO
 --

Individual Consent

The CCO has a consent form on file for this individual's enrollment into the CCO/HH or Basic HCBS Plan Support.

No
 CCO Effective Date
 7/1/2018

CCO Signatures

To the best of my knowledge, this individual meets all of the eligibility criteria necessary for participation in Basic HCBS Plan Support or Health Homes.

CCO Contact
 Patricia Walshwasserman
 CCO Contact Phone Number
 518-555-5555

CCO Contact's Electronic Signature
 --

Messages

--

Active

Only two fields, *TABS Program Code* and *Individual Consent*, need to be completed by the user to submit.

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

The Look Up icon is the option in CHOICES for all TABS Program Code fields. (see the graphic on the next page)

CCO1-CCO ENROLLMENT : INFORMATION

New CCO1-CCO Enrollment

City
 TOWN

County of Residence
 KINGS

CCO Information

CCO
 ADVANCE CARE ALLIANCE OF NY INC.

TABS Program Code
 --

DDSO
 --

Individual Consent

The CCO has a consent form on file for this individual's enrollment into the CCO/HH or Basic HCBS Plan Support.

No

CCO Effective Date
 7/1/2018

CCO Signatures

To the best of my knowledge, this individual meets all of the eligibility criteria necessary for participation in Basic HCBS Plan Support or Health Homes.

CCO Contact
 Patricia Walshwasserman
 CCO Contact Phone Number
 518-555-5555

CCO Contact's Electronic Signature
 --

Messages

--

NOTE: Each CCO will be affiliated with multiple DDSOs, please be sure to select the DDSO to which the person is registered. The Notice of Decision will have the DDSO. If unsure, please contact any of your affiliated DDSOs for help.

Otherwise once the enrollment is submitted, an error message regarding the person not being registered in the DDSO will display and the enrollment will get blocked.

Microsoft Dynamics CRM | WORKPLACE | CCO1-CCO Enrollm... | New CCO1-CCO Enr... | Create

SAVE | SAVE & CLOSE | SAVE & NEW | NEW | HELP ON THIS PAGE | FAQ | SUBMIT FORM

CCO1-CCO ENROLLMENT : INFORMATION
New CCO1-CCO Enrollment

City
TOWN

County of Residence
KINGS

CCO Information
CCO
ADVANCE CARE ALLIANCE OF NY INC.
TABS Program Code

DDSO

50060072 -- H HOME 0235 ADVANCE C CARE COORDINATION ORGANIZATION (CCO)	HEALTH HOMES
50060097 -- BASIC 0235 ADVANCE C CARE COORDINATION ORGANIZATION (CCO)	BASIC HCBS PLAN SUPPORT
66060072 -- H HOME 0261 ADVANCE C CARE COORDINATION ORGANIZATION (CCO)	HEALTH HOMES
66060097 -- BASIC 0261 ADVANCE C CARE COORDINATION ORGANIZATION (CCO)	BASIC HCBS PLAN SUPPORT
66060720 -- ACA HEALTH HOME 0230 CARE COORDINATION ORGANIZATION (CCO)	HEALTH HOMES
89698989 -- ADOTOPROG-CCO-FUTUREOPEN CARE COORDINATION ORGANIZATION (CCO)	BASIC HCBS PLAN SUPPORT

Look Up More Records

6 results
518-555-5555

Messages

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

Next, the CCO user must acknowledge they have a signed consent form on file. Change the default of “No” to a “Yes” by clicking on the field.

CCO Information
CCO
ADVANCE CARE ALLIANCE OF NY INC.
TABS Program Code
50060072 -- H HOME 0235 ADVANCE C

DDSO
BROOKLYN DDSO

Individual Consent
The CCO has a consent form on file for this individual's enrollment into the CCO/HH or Basic HCBS Plan Support.
Yes
CCO Effective Date
7/1/2018

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

Microsoft Dynamics CRM | WORKPLACE | CCO1-CCO Enrollm... | New CCO1-CCO Enr... | Create | Patrick Wickham... | PhoonTest

SAVE | SAVE & CLOSE | SAVE & NEW | NEW | HELP ON THIS PAGE | FAQ | SUBMIT FORM

CCO1-CCO ENROLLMENT : INFORMATION
New CCO1-CCO Enrollment

Individual Lookup
General

Individual Information
Individual
TABS ID
R_202143

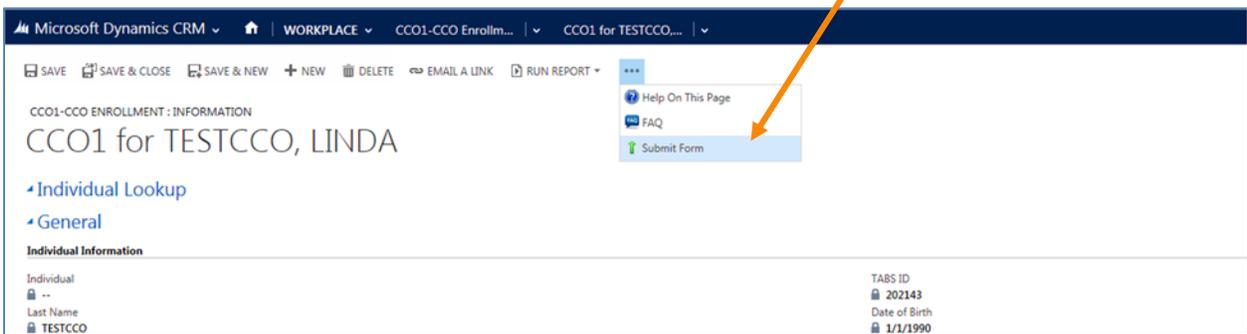
How to Submit the Form

At this time, there are no documents necessary to upload to the CCO1 prior to submission.

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

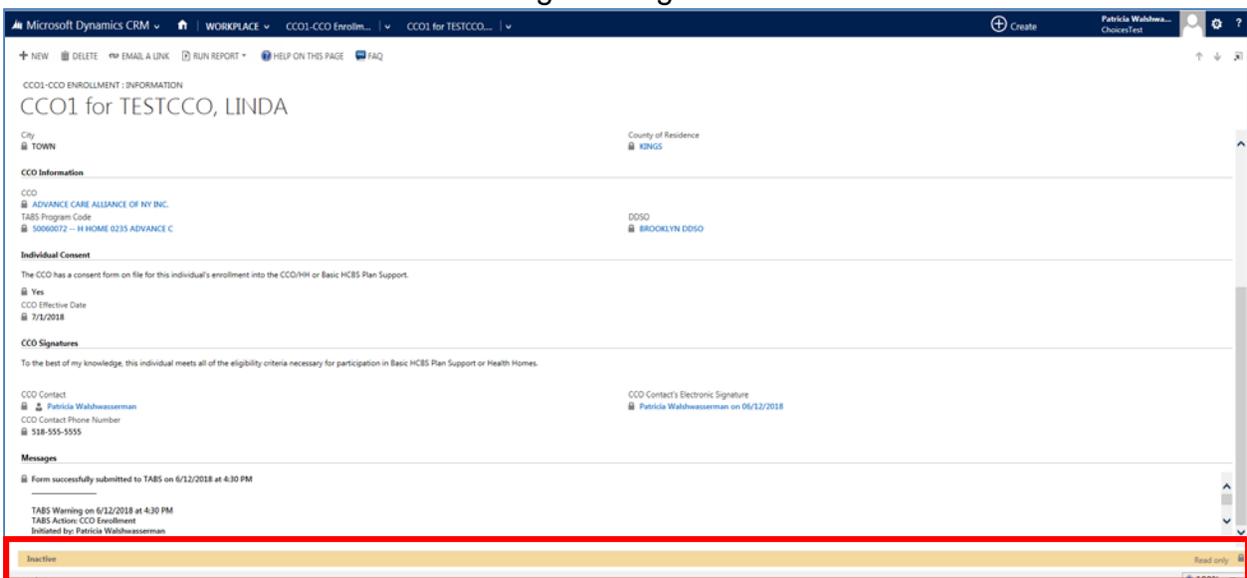


If the form had been saved before needing to submit, then, at the top of the form, click the 3 dots to display more functions, including, “Submit.”



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.

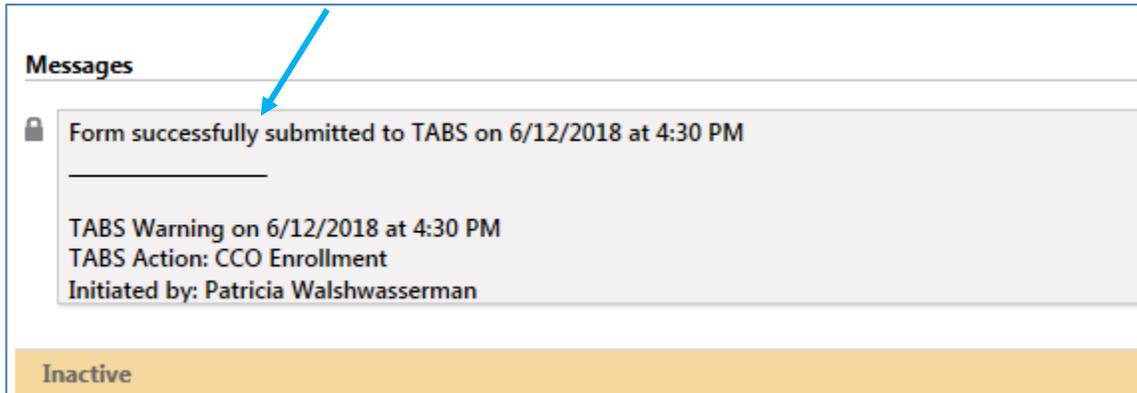
The user must read the TABS Warning messages.



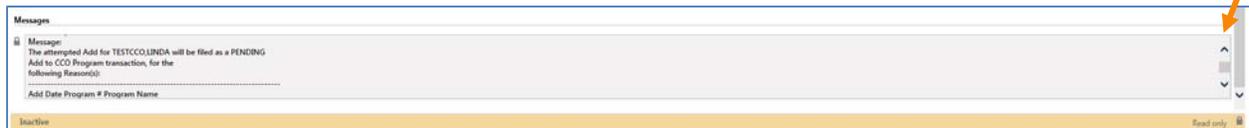
TABS Messages

The first line of the message box will note if the form's submission was successful or not.

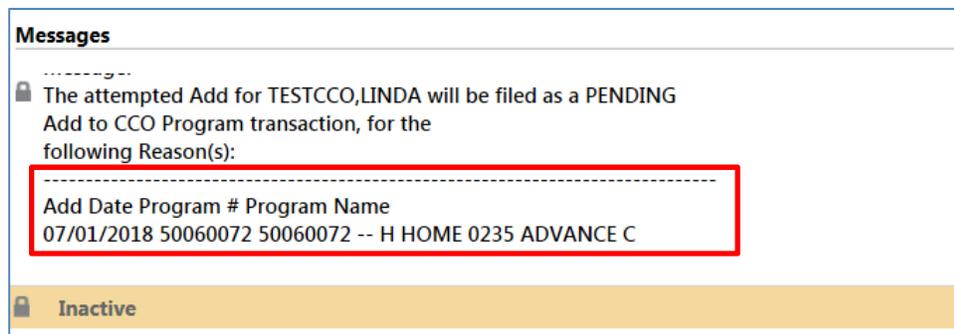
The subsequent "Warning" messages are critical to read and if necessary update or correct the person's record to ensure the enrollment will occur the 1st of the next month.



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



"PENDING Add to CCO..." is a valid message since the add is always the 1st of the next month.



TABS Messages- Continued

Other messages must be reviewed and action taken. The LOC message means the LCED Effective Date is not on file in TABS and CCO enrollment cannot occur until this is fixed. However, the enrollment will pend until the issue is fixed. Enrollment will be the 1st of the month following the fix being filed.

Messages

🔒 Add Date Program # Program Name
07/01/2018 50060072 50060072 -- H HOME 0235 ADVANCE C
Pending Reason(s)

FUT = The Add to Program Date is a Future Date.
LOC = Individual does not have Current ICF Level of Care on file

Not Registered in this DDSO message means the form has not filed to TABS for a pending enrollment.

The person being enrolled into one of the CCO programs may not be registered in the DDSO that the particular program code selected on this form is affiliated.

If the user sees this message, go back and check the paperwork on the person to see the DDSO that registered the person or call the DDSO for this information.

Messages

🔒 TABS Error on 5/21/2018 at 1:14 PM
TABS Action: CCO Enrollment
Initiated by: testaca01 CCO Supervisor
Message:
*** NOT REGISTERED IN THIS DDSO ***

Active

At this time, the following 2 messages are also possible and will pend the enrollment until the issue is fixed. Enrollment will be the 1st of the month following the fix being filed.

Messages

🔒 -----
MCD = No Medicaid Eligibility.
ELG = Individual must be OPWDD Eligible or Provisional (to age 10)