CCO Documentation Submission Form
User Guide
CCO Documentation Submission Form
(Data in this guide is fake)

This form has two purposes, Eligibility Determination and Service Authorization.

For Eligibility Determination, CCO staff will need to attach all documents necessary for the DDRO to determine OPWDD Eligibility and Level of Care Eligibility Determination. Also, specific to this purpose, the person for whom the form is being completed will not be known to the CCO. Therefore, the person will not have an Individual’s record in CHOICES. Only when a person is being served by the CCO will an Individual’s record be available.

The second purpose, Service Authorization, the individual will be known to the CCO and therefore, an Individual’s CHOICES record will exist from which the form can be completed or staff can use the look up function explained later in this document. This purpose is used when other OPWDD services are being requested and OPWDD needs additional documentation to review the request.

The CHOICES roles that will have access to this form are the following:
CCO Supervisor – Create, edit and submit
CCO Level 2 - Create, edit and submit
CCO Level 1 – Read only

Documentation Submission 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 *Documentation Submission* tile displays, click on the tile.

The Documentation Submissions sub-section displays (default views are set).

**Views and Sorting**

The default is the “Active” list. At 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.

By clicking on the, *Inactive Documentation Submission*, 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.
To Search for a Specific Individual
Click on the column header, Individual, to sort the list in an alphabetical order by the individual’s last name. The lists can be sorted, A to Z, or, Z to A, to search quickly for a specific person.

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 Documentation Submission form are:
1. Saved – A saved form can be opened, edited and then saved or submitted.
2. Submitted – A form that is no longer editable by the CCO, but available to the DDRO for processing or finalizing.

Inactive status for the Documentation Submission form is:
1. Completed – this form has been submitted and has been finalized by the DDRO.
How to Create, Upload Documents and Submit the Form

The person for whom the user needs to upload documents should not be known to the CCO, therefore not on the “Individuals” list.

Go to the Documentation Submission sub-section under, Workplace.

At the Documentation Submissions section, click on the “+ New ”

Pull the Individual’s demographic information into the form by TABS ID.
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.
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. Only two fields, *Reason for Submission* and *DDSO* (required to “Submit” the form) need to be completed by the user to submit.

At the *Reason for Submission* field, hover over the field then click to view the options.
1. **Eligibility Determination** is for all documents necessary for OPWDD to determine a person’s Eligibility Status.
2. **Service Authorization** is to be used when the care manager is ready to request service authorization for the person. For this purpose, the form can be opened at the person’s record, under the sub-section, Individuals.

The *DDSO* field is a lookup field, click the icon to display the values list, select DDSO.
How to Upload Supporting Documents to the Form

Once the form’s general page has been completed the user can upload any necessary documents.

In CHOICES, forms need to be saved to allow additional functionality in the form. Click, Save.

The ability to move to the Supporting Documents section of the form is now available.
1. Click on the down arrow (on the blue CRM line) next to the Documentation Sub…tile for the person to display the sections of the form.
2. Click on the Supporting Documents tile to move to that section of the form.
3. To upload a document, click “New”

Note: There is an established naming convention for any document to be uploaded to a person’s record. Also, users need to categorize the document for ease of retrieval.
This is necessary to ensure all users of a person’s record can find a document without delay or users do not open other documents that they do not need to see.

Naming Convention: Last name_first name_TABS ID_YYYY_MM_DD_Document Name
Example: Peterman_Jacopo_201249_2018_02_28_PsychologicalEvalJP
Be sure your document file name adheres to the naming convention prior to beginning this process.

4. A dialog box displays, click the “Click Here to Upload a File…” button to begin.

A “browse” dialog box displays for the user to locate, on their computer, the document to upload.

5. Once the document has finished uploading, a message will display noting the user will need to categorize the document, click OK.
6. Categorize per the standard for the reason for submission either Eligibility Determination or Service Authorization. If unsure, please check with your supervisor or the DDRO.

Select a **Class**, **Type** and **Subtype**. 
**Type** is dependent on the **Class** chosen. And **Subtype** is dependent on the **Type** and for a few **Types**, there are no **Subtypes**.

In the example below, the document is for the DDRO to establish OPWDD Eligibility. 
**Class:** Eligibility Determination  
**Type:** Psychological Evaluation Report  
**Subtype:** None are available with this Type so the field just locks
Click the *Save & Close* button

The pop up closes and the classification may or may not be readily displayed.

To add more documents, repeat the above steps.
The example below is now a Social Evaluation being categorized.
Return to the General Page of the Form
The last tile on the CRM line is the opened window. Click on the tile to return to the general page of the form.

How to Submit the Form
Once all documents have been uploaded, the form can be submitted. On the General page, click the 3 dots to display more functions, including, “Submit.”

Note: If the DDSO field is not completed an error message will display. Click, OK and complete the DDSO field. Then click “Submit.”
The form will “blink”, complete the Transaction Date and Submitted By fields and then close. The user is returned to the Active Documentation Submissions List.

The Submission Information section is now completed with the user’s information.

Note: Once a form has been submitted no additional documents can be added.
Below is a copy of the error message.
Processing Documentation Submission Forms

The DDRO will have a copy of submitted forms in a queue from which they will verify the documents.

They will then take the necessary steps to start the business process for either the eligibility determination or service authorization. The DDRO will contact the CCO if there is a problem.

The CCO or submitter can monitor the progress by checking the either the Active or the Inactive list.

NOTE: There is no functionality to delete any submitted or completed forms.

Following is the error message a user will receive if they click, Delete…