CHOICES Navigation
User Guide
**Navigation & Terminology**

This section will familiarize the user on the methods used to navigate through the CHOICES System.

**Sign In**

To Sign into CHOICES, either use the following URL:

https://choices.opwdd.ny.gov

Or, Sign In, at the OPWDD website, [http://www.opwdd.ny.gov](http://www.opwdd.ny.gov), Login, CHOICES

A realm page will display, select the appropriate option, Voluntary agencies will select Non OPWDD...

Then click “Continue to Sign In”

Please read the Affirmation and then enter your user name and password, then click the [Sign In](#).
If successful, you will be brought to the **Dashboards** screen for CHOICES.

Initially, you may see a video that discusses the changes that occurred in the last upgrade. To close the video and never see it again, check the box that reads, ‘Don’t show me this again.’

To view the video tutorial click the arrow at the bottom to scroll through each screen.

If you want to be able to view this video again, after scrolling through the slides, once you get to the end of the video, uncheck the box that reads, ‘Don’t show me this again.’
Once you close the video tutorial, you will see the CHOICES dashboard. There is an option to change your default pane. Please see the Step by Step, View User Profile.

The Workplace Menu or navigation tiles move you around inside the application.

The content pane displays whatever folder you have moved to in the Workplace Menu area which contains all the actions necessary for the section selected in Workplace.

Display of the user signed on to the system and the Sign Out Area.

Note: Items displayed in the Workplace Menu are based on whether you are an Agency or DDSO staff and the role you have within CHOICES.

When finished working in CHOICES, please be sure to sign out by clicking your name in the top right corner of the screen and then click Sign Out to disconnect.
Navigation

To move to (or display) another section or form, place your cursor over the Workplace selection at the top of the screen.

Once you hover over the Workplace selection a list of Tiles will drop down. This is how you Navigate to Reports, Individuals and Forms.

You can use the arrow at the left or right to scroll through more Tiles/Sections.

In this example, we are moving from Workplace to the Individuals folder. Click the Individuals Tile.
**Note:** Next to some Tiles, such as Individuals, there is another dropdown arrow next to the Tile. This will display any Recently viewed Individuals. This makes it easier to navigate to that person’s record.

The Individuals section displays everyone that is known to TABS and served by the agency. DDSO *Individuals* section, will have all Individuals known to TABS.

**Selection of a Record**

To find a specific Individual:

In the box to the right, above the list of Individuals, type the last name, or last and first name of the Individual using a comma and no spaces, click the Enter key or click the Find icon.

The names that match that search appear in the list.

From the list of Individuals displayed by last name, click on the correct Individual’s name to open their record…

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**Microsoft Dynamics CRM**

**WORKPLACE**

**INDIVIDUALS**

Recently Viewed

- BERRY, BILL
- BERRY, DAVID

**Welcome to CHOICES UAT**

AASWETA 364308 8/8/1990

**Microsoft Dynamics CRM**

**WORKPLACE**

**INDIVIDUALS**

Search Results

- BERRY, BILL
Once the Individual’s record is opened, you once again use the Tiles at the top to Navigate to the Section or Form you wish to access. Click the arrow next to the person’s name, at the top of the screen.

Use the arrow to scroll across through the Tiles.

We want to access the DDP1 section for this person, so we will click **DDP1 – REGISTRATION/M**.

Click **ADD NEW DDP1 – REGIST**… to start a new DDP1.
This will open a new DDP1 for this person.

An example of a Form ribbon

The Save and Submit buttons can be found at the top of the page on the Form ribbon.

Fields that have a Double Dash are fields that you can fill in. Fields that have a padlock icon are locked and you cannot edit them.
Fields like **Add TABS Program Codes** have selections that you have to select for that field.

If you do not see the selection you wish to make, scroll to the bottom of the list and click **Look Up More Records**.

From the Look Up Records popup, you can select the Program you would like and click Add, to add that record to the **Add TABS Program Code** field.
Fields like the **Remove/Add Date** have calendar features, where you can click the calendar to add the date.

Choose the Year, Month and Day to complete Calendar fields, Once you have the Month and Year selected, you will choose the date by clicking on the day you wish to select.

Once you Save the DDP1, at the top of the form, you will not see a dropdown arrow next to the DDP1 for header.

Hover over that dropdown to be able to view sections for things like **Supporting Documents**.

The other thing that occurs when you Save the form is that the Submit button goes away, and is replaced with three dots. Click the dots to view the **PDF**, **Copy** and **Submit Form** buttons.

Click **Submit Form** to Submit the DDP1.

The **View PDF** button creates a PDF version of the form for viewing and printing. The **Copy** button allows you to create an editable copy of an existing form.
Icons

File, New, is to create a New Record for an Individual NOT known to your agency.

Share, is to share the selected individual, with other CHOICES users.

Displays a list of forms you recently looked up. Individuals has the same feature.

Returns user to the Dashboards (Home) Page

Navigating to other sections

Agencies

In the Agencies section you can find information about Agencies, Program Codes and DDSOs. Place your cursor to highlight the section and click. Select a record by clicking on the name of the record to open.
Once any record is open, you can access information like TABS Inquiries and Program Codes by clicking the dropdown arrow.

Highlight and click on any section, to move to that section.

**Forms**

There are *multiple Views* of each Form’s list.

**Active** will display only those forms with an Active Status. For an agency, on the DDP1 example, that will be Saved and Submitted, meaning they are not finalized. And other forms may have additional Active Status, e.g. the ISP will have “In Process”.

To access this area click the dropdown area next to where it says Active DDP1. You can change the view to Inactive DDP1s, Returned DDP1s that you submitted, or your own personal views.

In the Active View, of any form list, you can search for all forms, of that type, for a particular Individual.
In this example I am searching for only Berry’s DDP1s.

**NOTE:** If the Individual is known to your agency, use the *Individual’s* record to search for any forms. All forms created for an Individual reside on their record and copy over to the Forms list.

**Search for Forms created by a Particular User**

This is a more common search, to find all the forms, such as DDP1s, you may have been working on.

The columns have heading buttons and each allows the user to sort the information by that field. Hover over the button to highlight and then click.

In this example, all the DDP1s are now sorted accordingly and grouped by the user who created the forms.

**NOTE:** Each search described above can be done for all Forms, sorted by any of the columns and done for any of the Views.
Inactive

Inactive will display only those forms with an Inactive Status.

Change the View by hovering over the Active View to display other Views available for that list.

Highlight the Inactive MSC1, or whichever list you are searching, and then click to display all of the Inactive forms.

Remember: you can sort any list, by any column, by clicking on the column’s heading button.

Clicking 2Xs on the column will re-sort the information by the latest date or last letter of the criteria of that column.
To Search for a Returned Form

Go to the Inactive section of a Forms list.

Returned forms are always assigned a status of Inactive. Users will first be viewing all Inactive forms, not just Returned. Sort the list by clicking on Form Status.

The DDP1 Section, has a unique Returned DDP1s submitted by me (the user signed in)

NOTE: Returned forms can only be copied to resubmit. You cannot resubmit the original returned form, copy it and then fix the mistakes or upload the additional supporting documents.
**Sign Out**

To Sign out of CHOICES, at the top of the page where your name is displayed, click the icon that looks like a person.

The option to Sign Out will display. Click **Sign Out**.