NEW YORK STATE OF OPPORTUNITY.

Office for People With Developmental Disabilities

CHOICES Navigation User Guide

Navigation

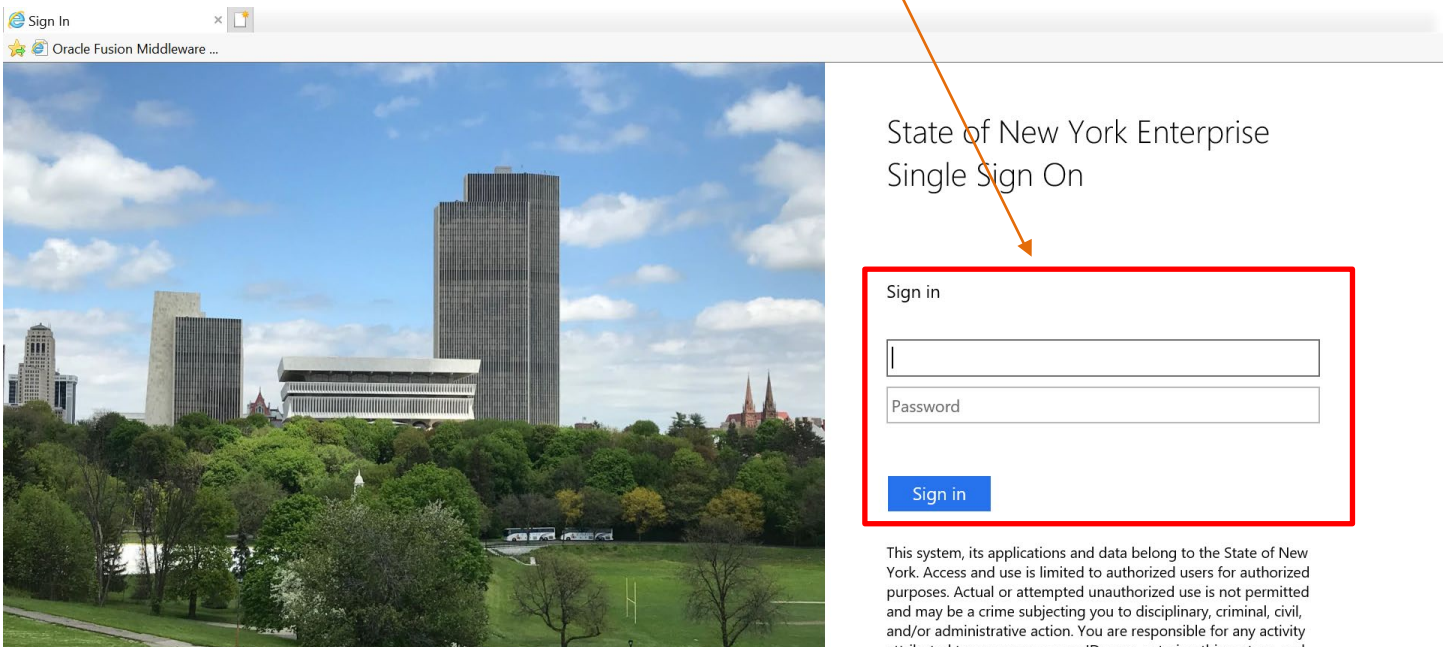
(The personal information and accompanying data shown in this guide are fictional and are used for illustrative purposes only.)

This section will familiarize the user on how to navigate through the CHOICES System. Additional information on specific screens can be found in other user guides.

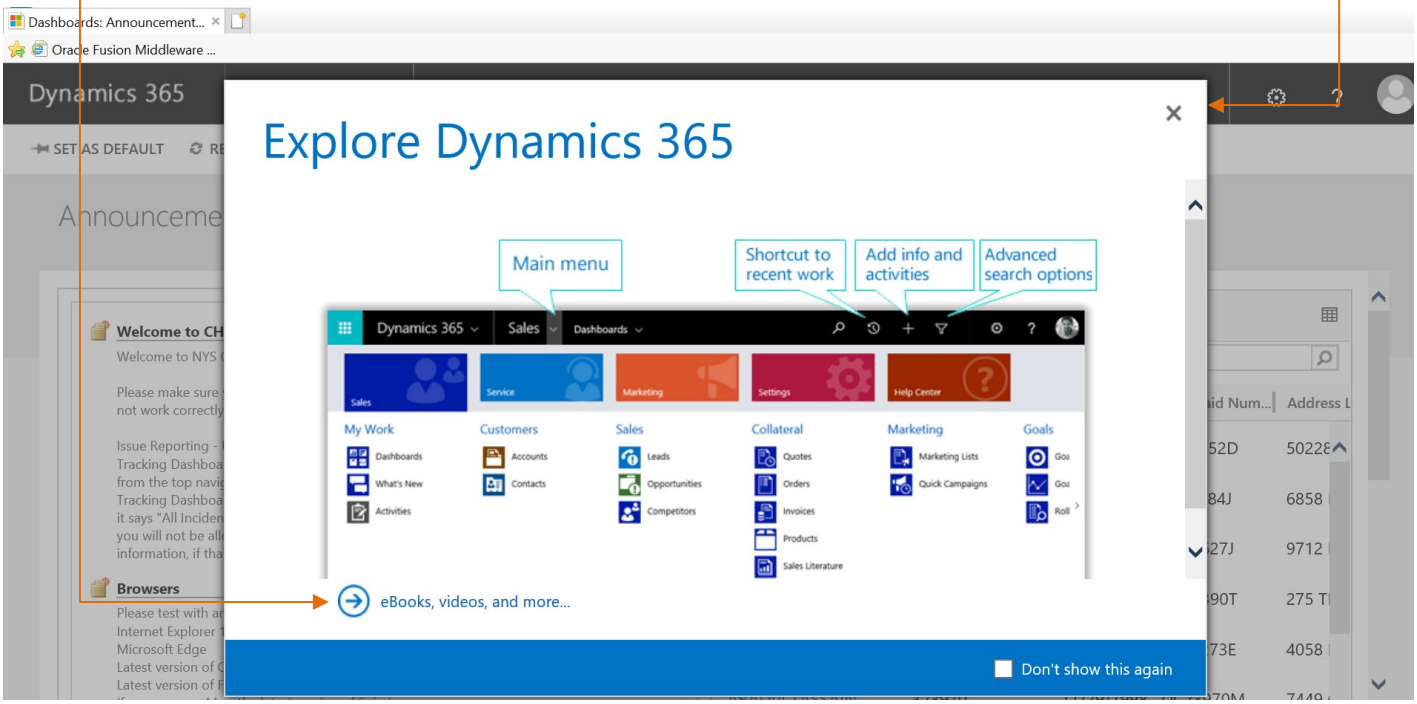
Sign In

To Sign into CHOICES, use the following URL: https://choices.opwdd.ny.gov

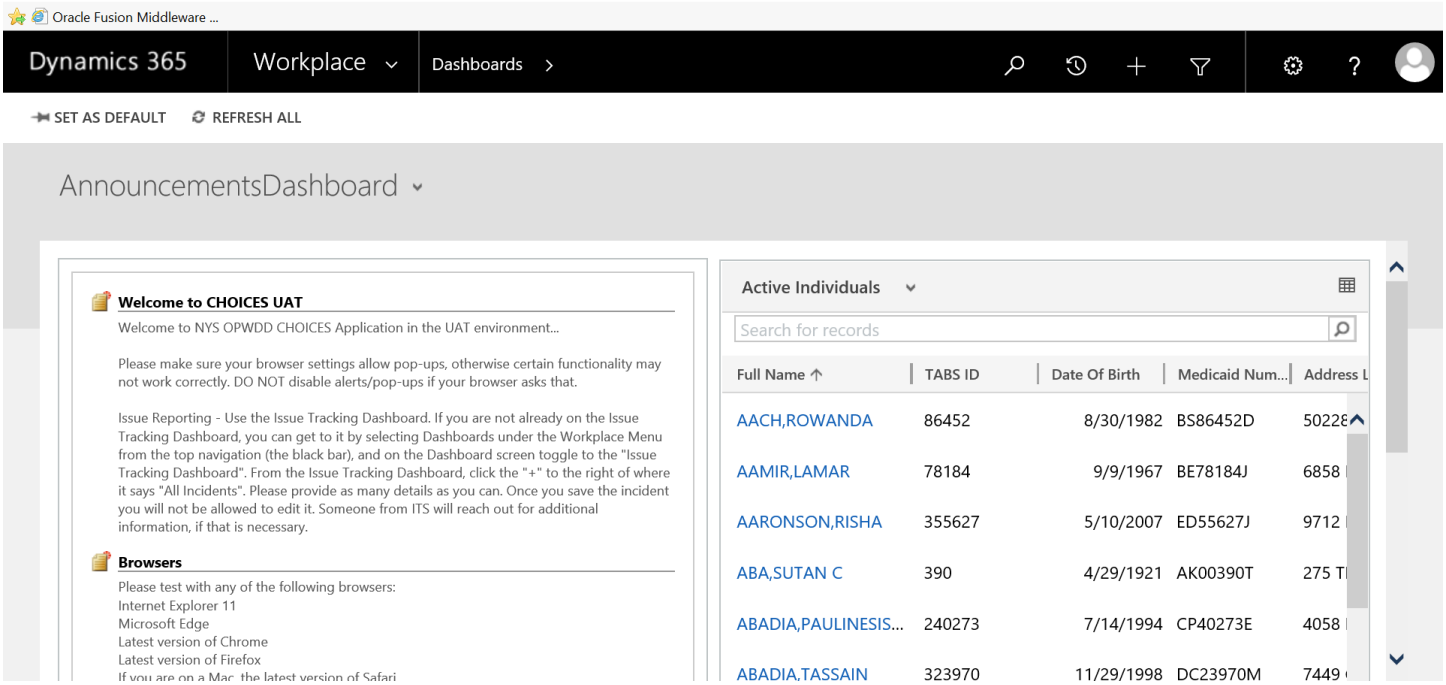
and enter your username and password. This is the same login if you are an OPWDD user. If you are a voluntary agency user, you will be given a user name and password when you are notified of access.



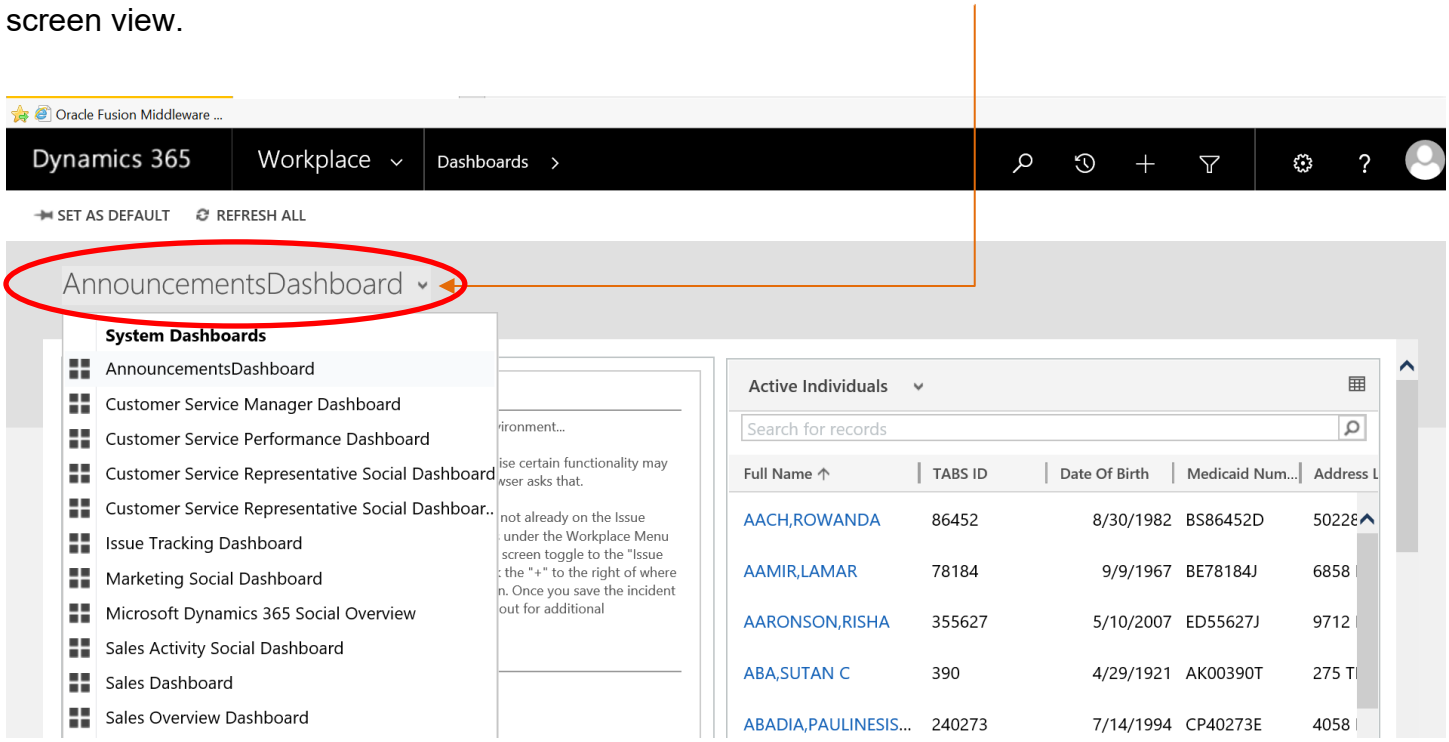
Once logged in, the **Explore Dynamics 365** screen will appear. If interested, click on the blue circled right arrow for more information. If not, click the X in the top right corner to close the screen.



The dashboard screen for CHOICES and a list of individuals will appear. The dashboard screen shows important announcements that affect CHOICES users.



To change your default home screen, click the arrow next to the Announcements Dashboard and a drop down of options will appear. Choose one of the options from the drop down to change the home screen view.

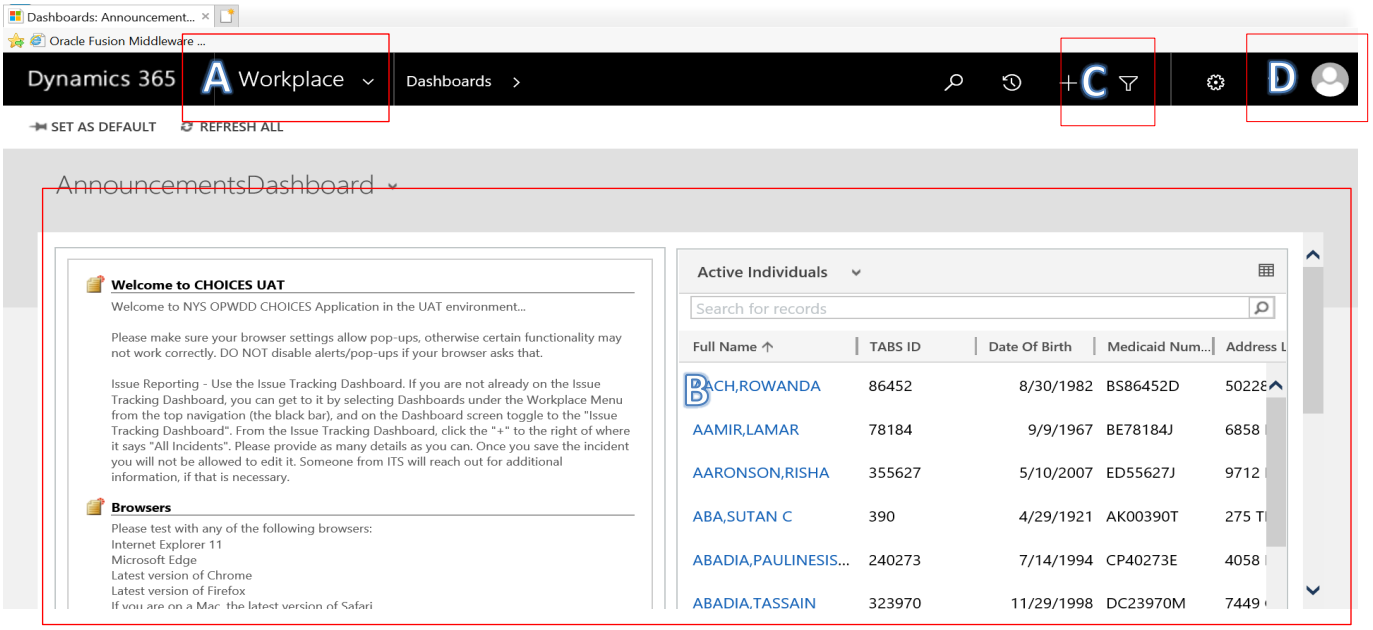


To return to the Dashboard/Home screen at anytime, click Workplace:

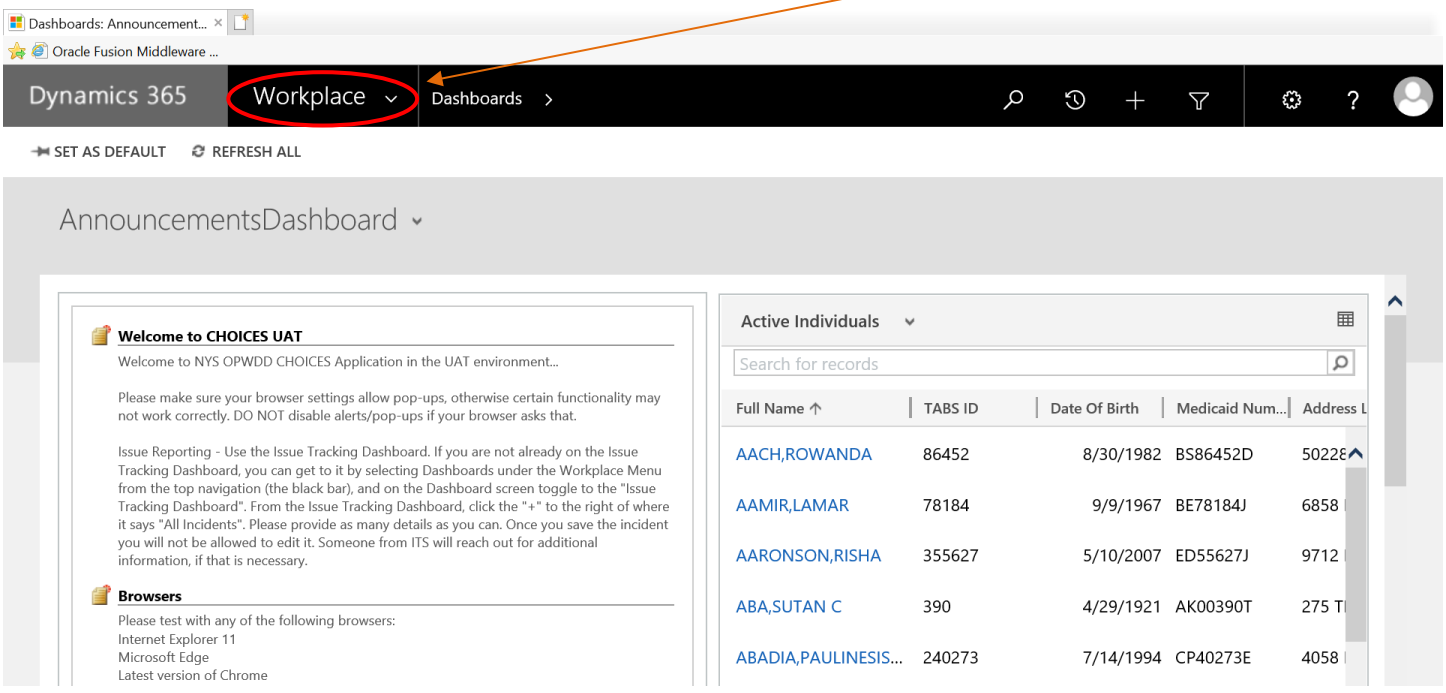
Navigation

The following are the major areas of the CHOICES application:

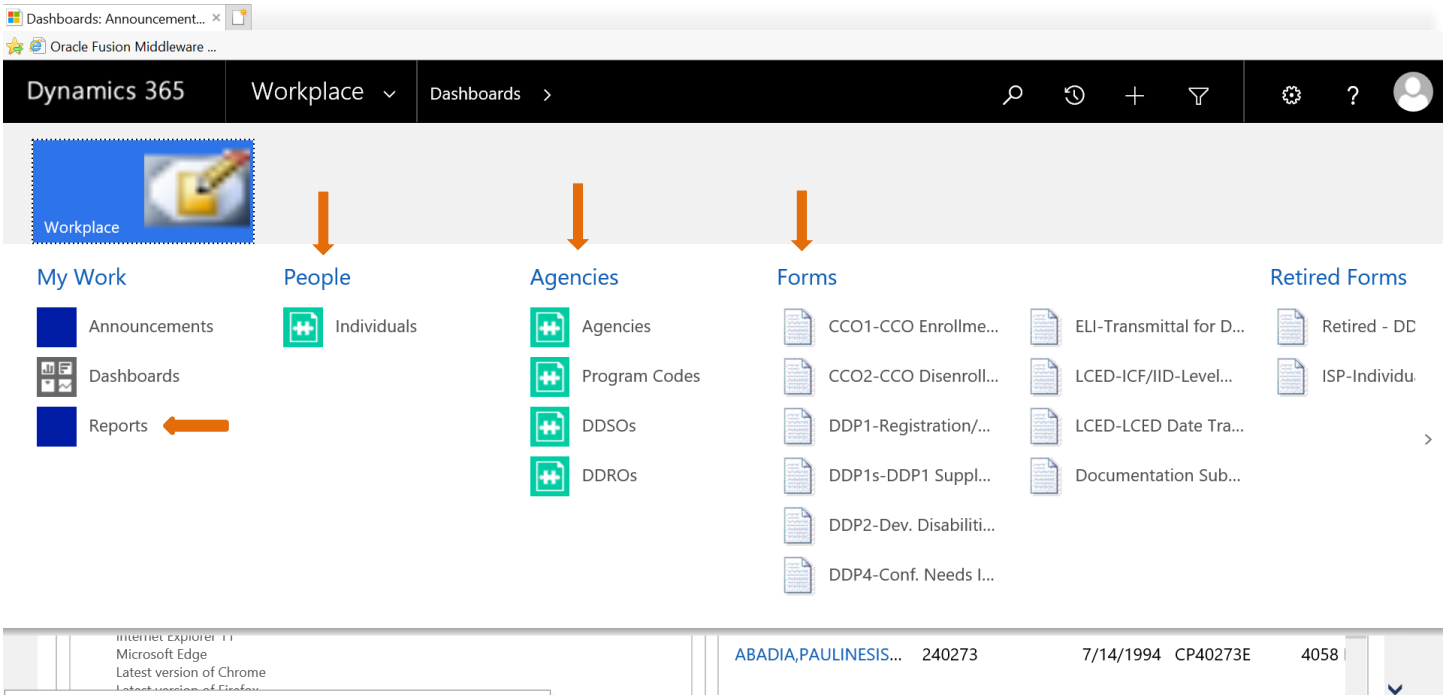
A. The Workplace Menu or navigation tiles move you around inside the application. Items displayed in the Workplace Menu are based on whether you are an Agency or DDSO staff and the role you have within CHOICES
B. The content pane displays whatever screen you have moved to in the Workplace Menu
C. Advanced Find is a query and report creator.
D. Display of the user signed on to the system and where to sign-out.



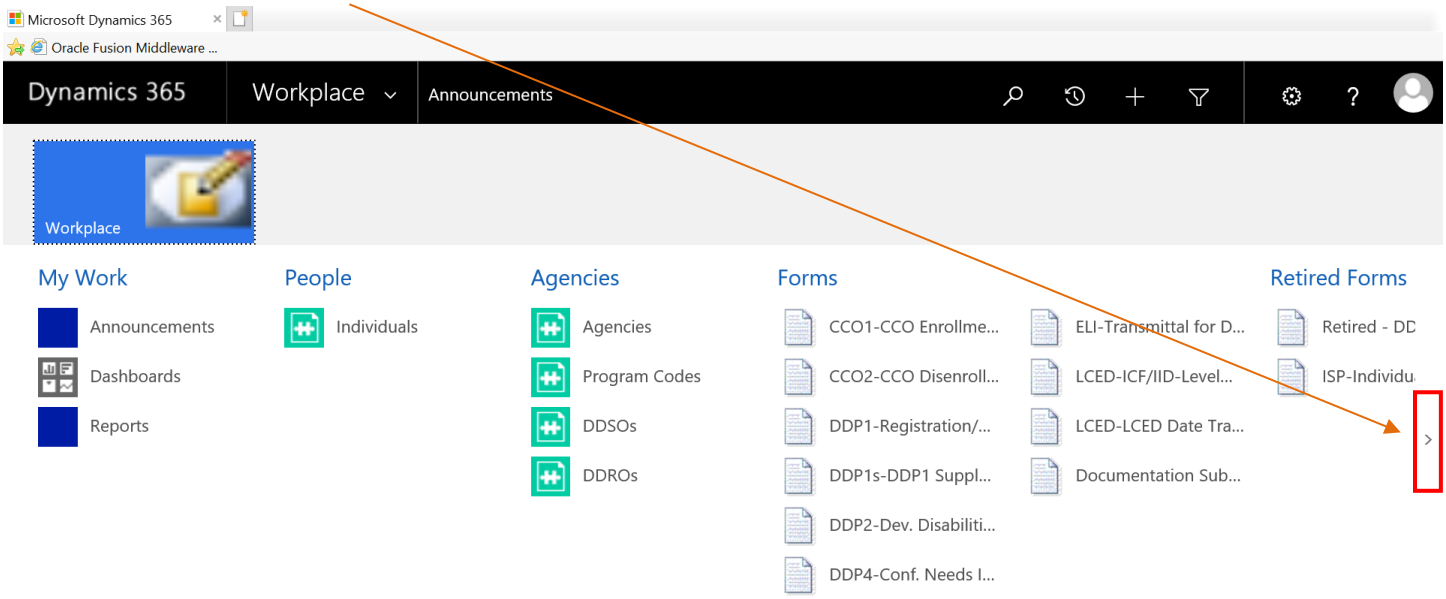
To move to (or display) another section or form, click the down arrow next to Workplace at the top of the screen.



Once you click on the down arrow, a list of tiles will drop down. This is how you Navigate to Reports, People, Agencies and Forms.



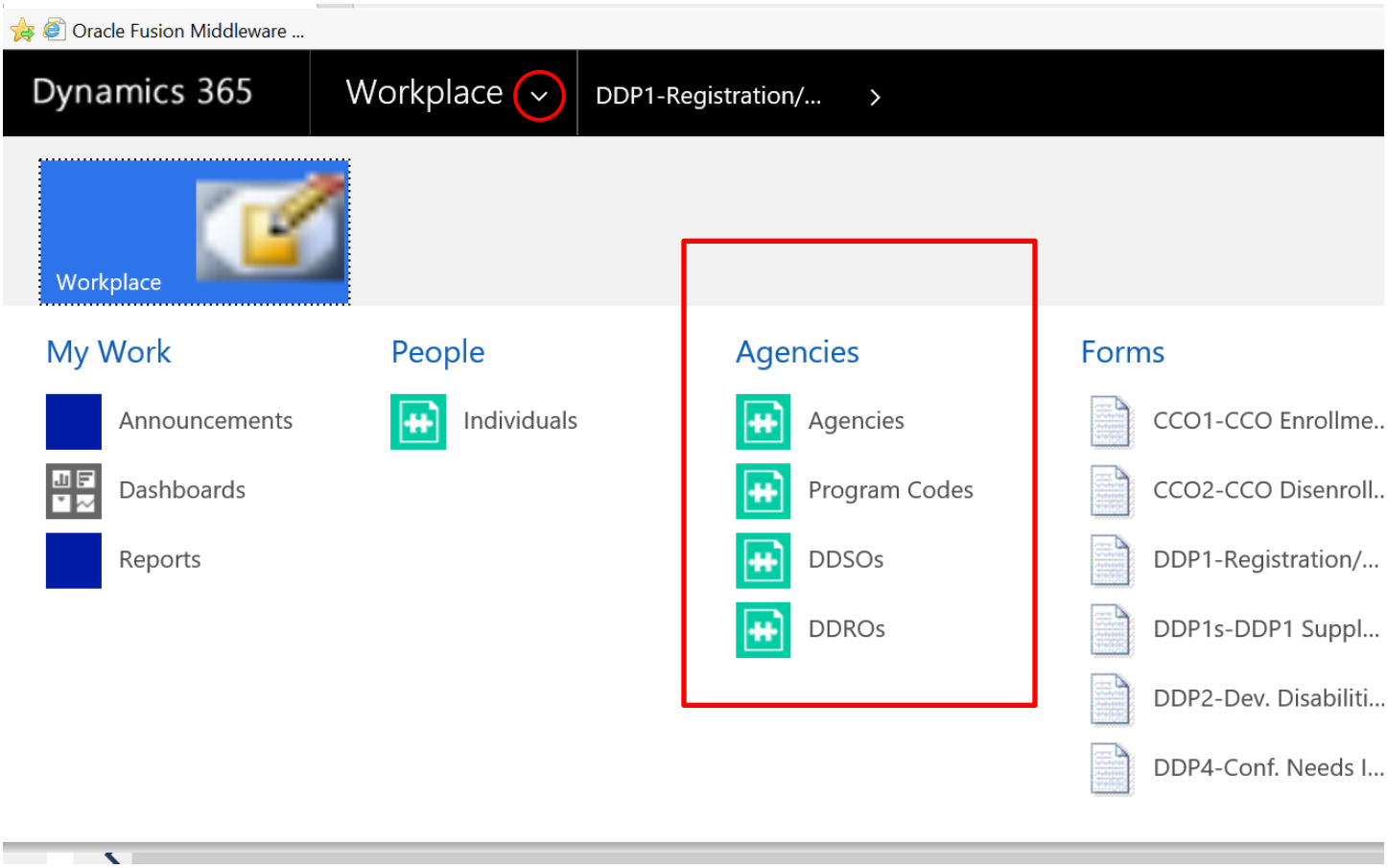
You can use the arrow on the left to scroll to more Tiles/Sections.



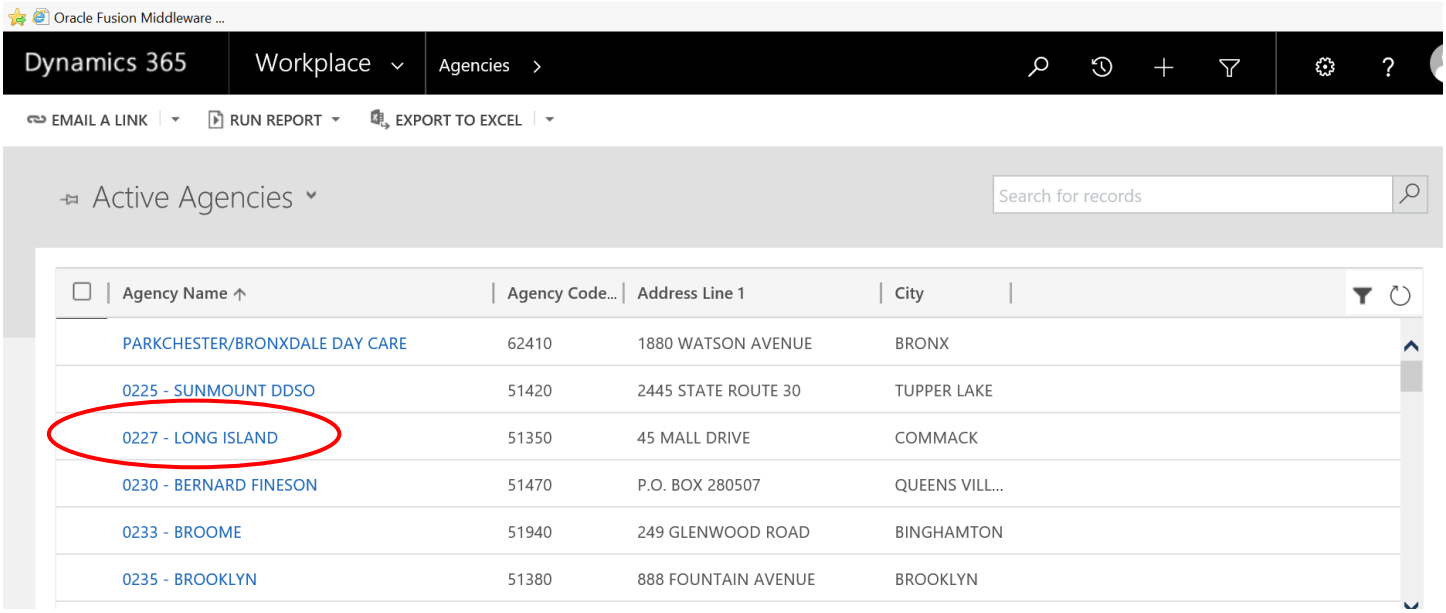
Agencies Section

In the Agencies section you can find information about **Agencies**, **Program Codes** and **DDSO**s. The ability to view certain information depends on if you are a voluntary agency user or an OPWDD user.

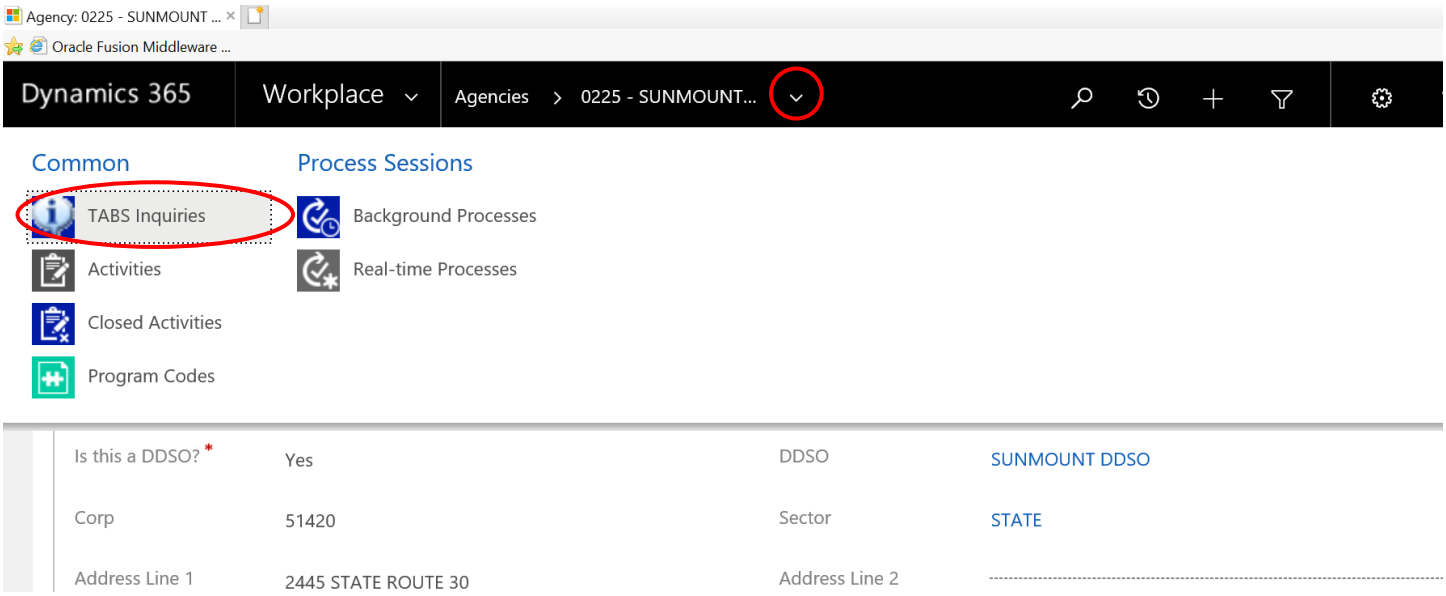
To view this section, click on the arrow next to Workplace and then select the desired screen.



Select a record by clicking on the name of the record to open. These are in **blue**.

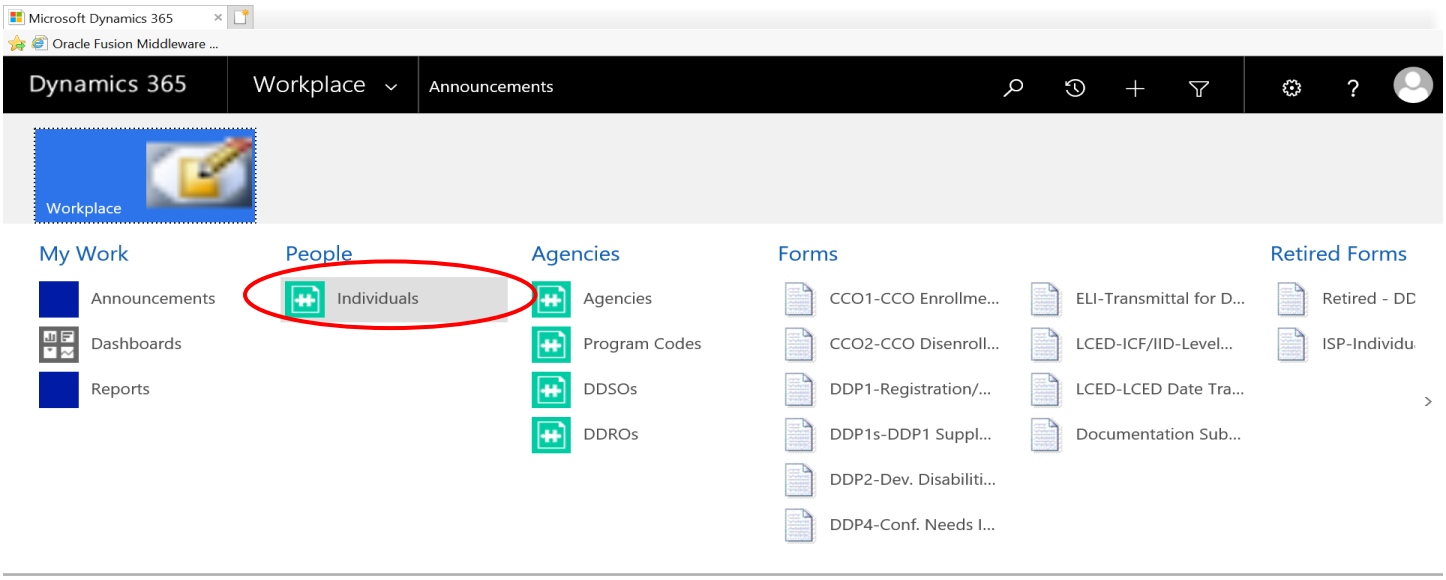


Once any record is open, you can access information like TABS Inquiries and Program Codes by clicking the dropdown arrow. Highlight and click on any section, to move to that section.

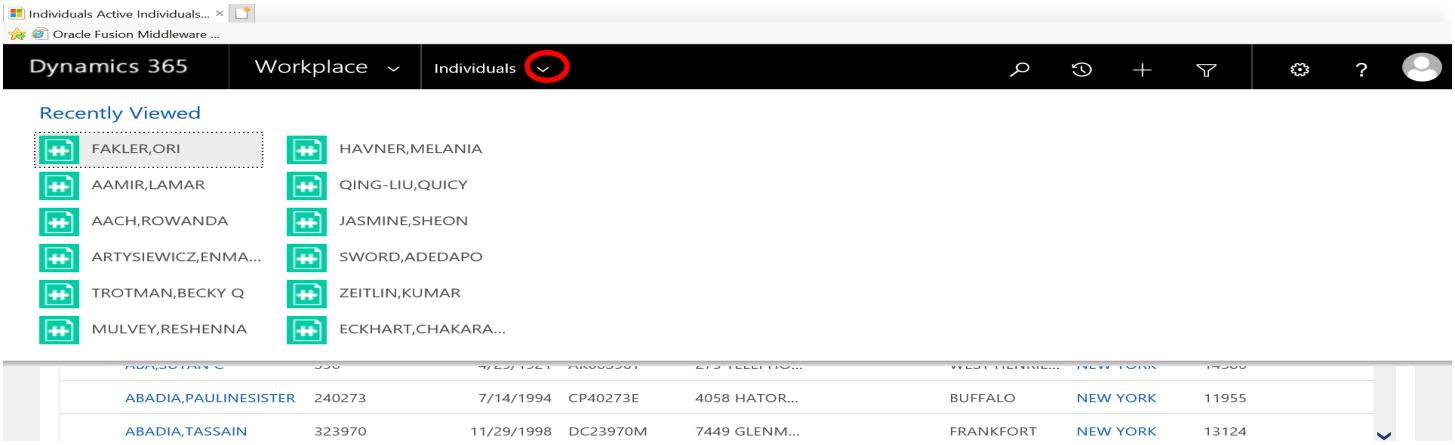


Individuals Section

In this example, we are moving from Workplace to the Individuals screen. Click the Individuals Tile.

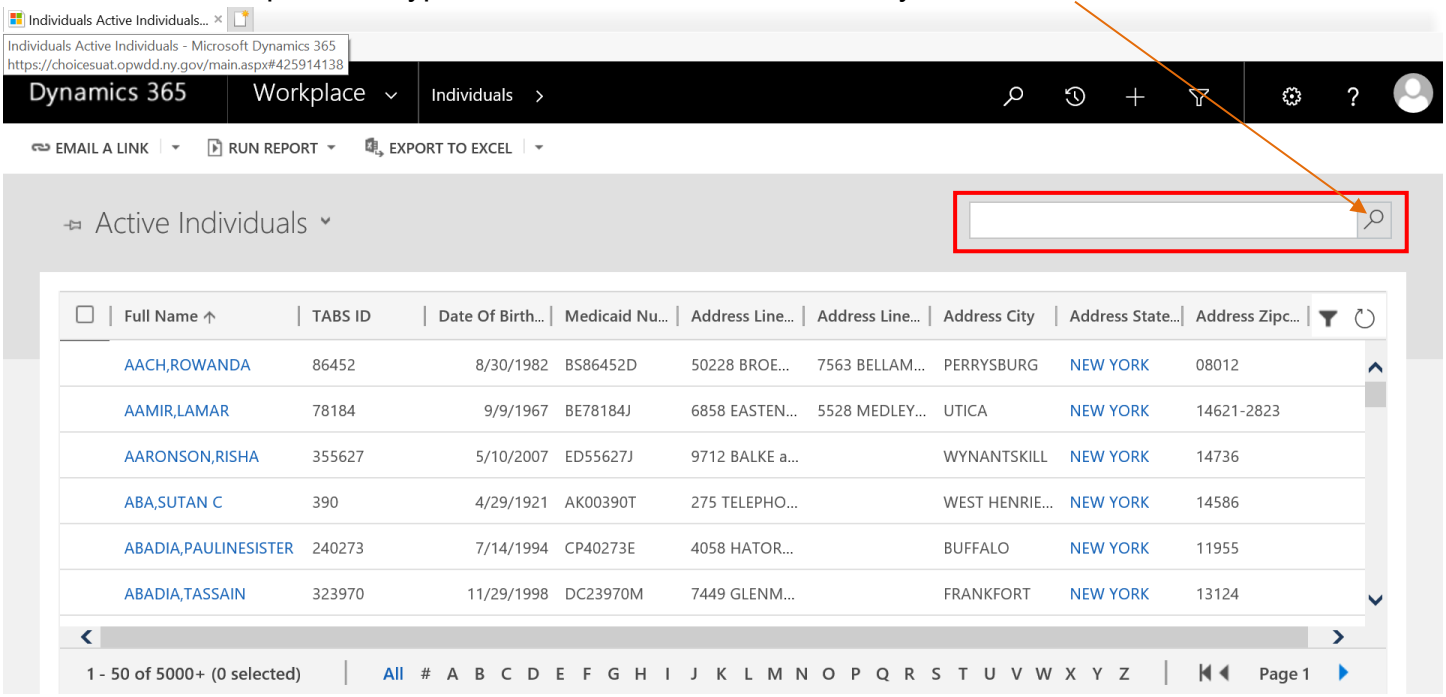


To view any recent records, click the arrow next to Individuals. A dropdown of recently viewed records will appear.



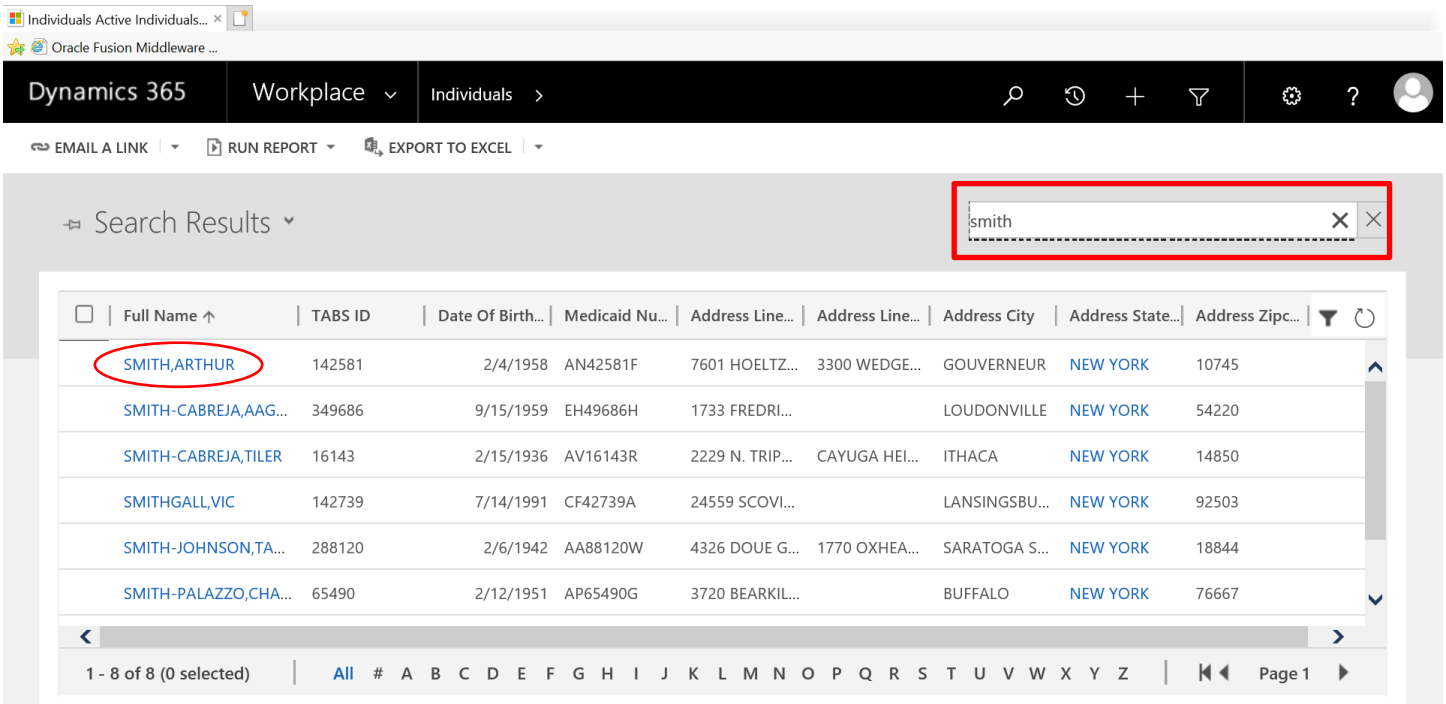
For voluntary agency users, the Individuals section displays everyone that is served by that agency. For OPWDD users, all individuals will be displayed.

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

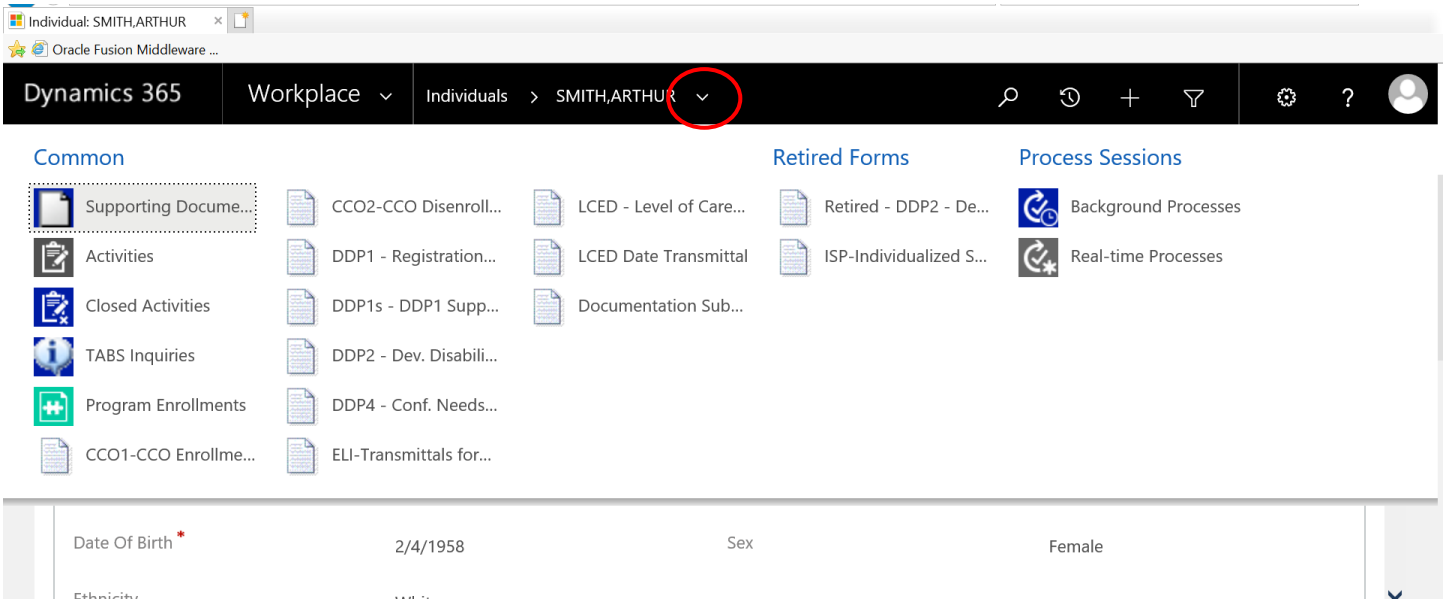


The names that match that search appear in the list.

From the list of Individuals displayed by last name, click on the correct Individual's name (in blue) to open their record.

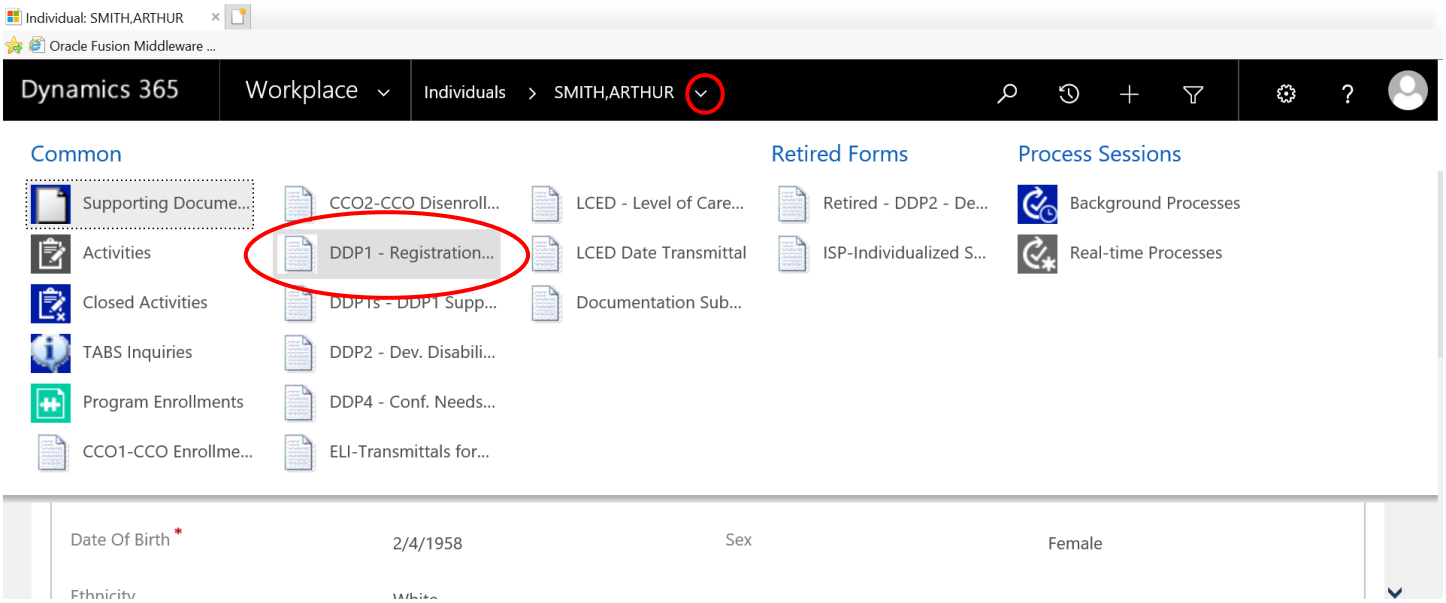


Once the Individual's record is opened, you can use the tiles at the top to navigate to the screen or Form you wish to access.

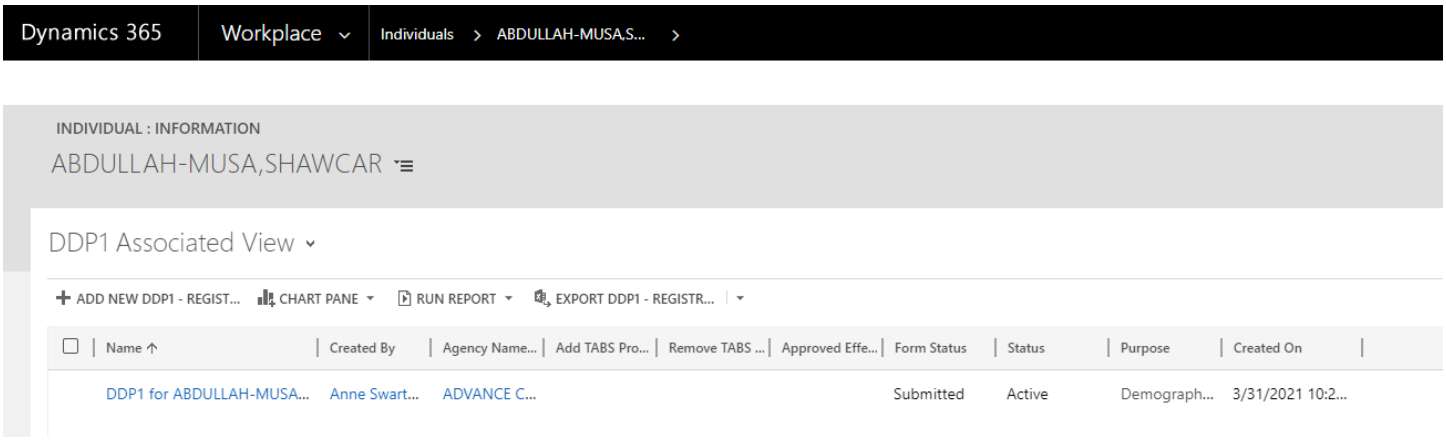


Finding a Form or Screen Via the Individual's Record

Click the arrow next to the person's name to view the list of available forms and screens. Click on the screen or form. For this example, we will click on **DDP1 – REGISTRATION…**.

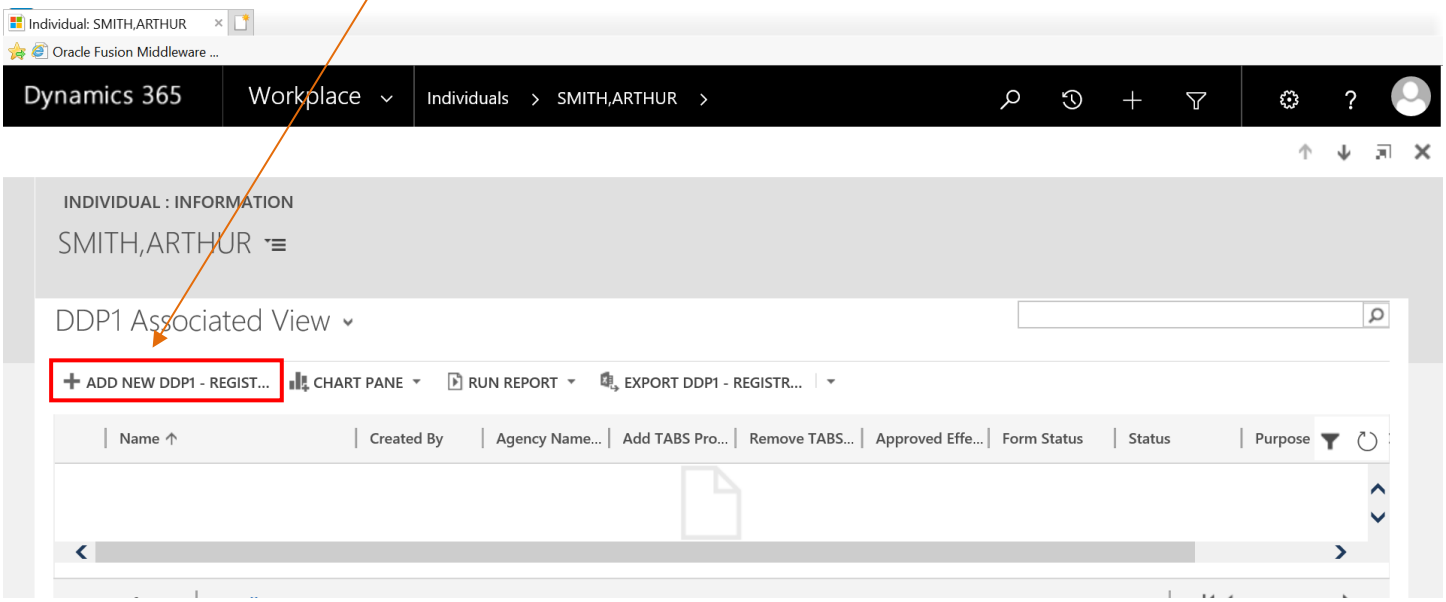


The DDP1 form will open and any forms created for the individual will also be appear.



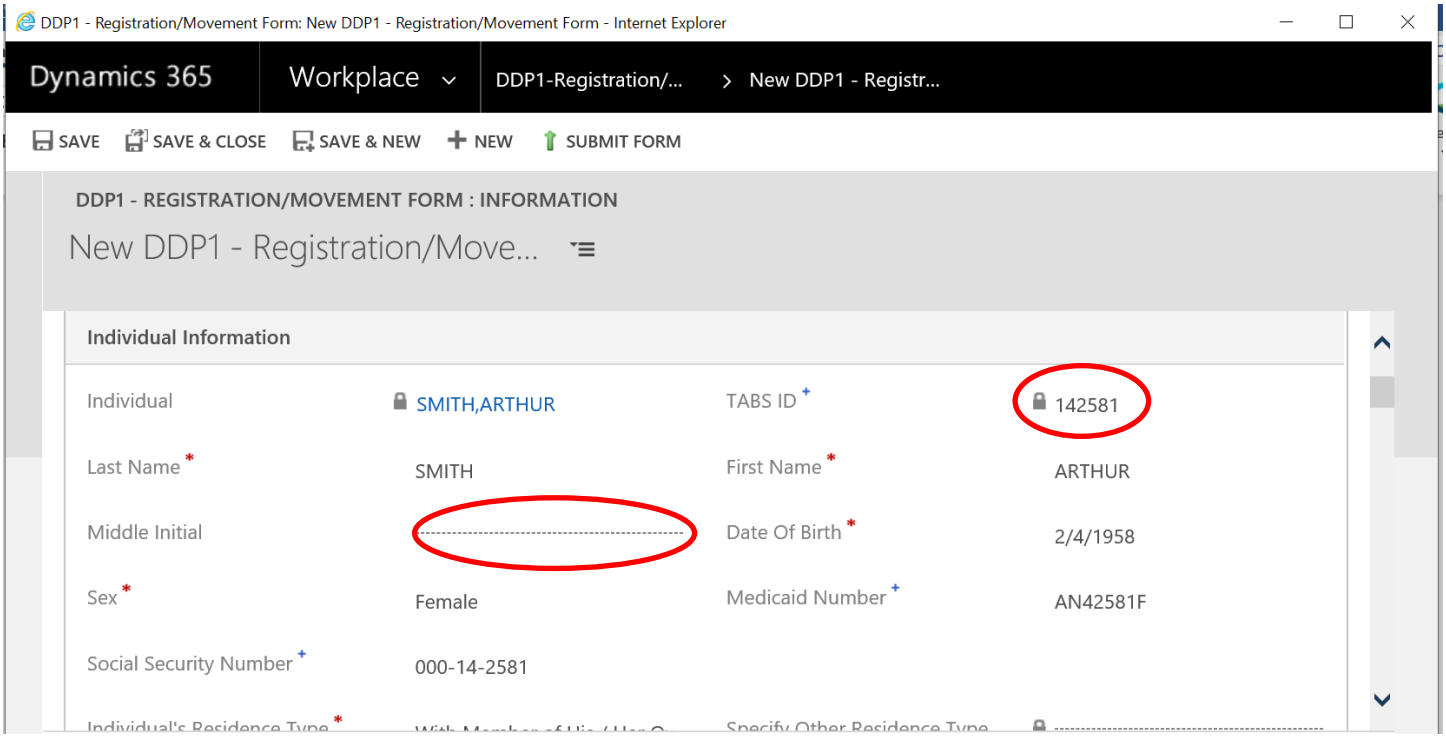
Working in Forms

To start a new form, click **ADD NEW DDP1 – REGIST….**

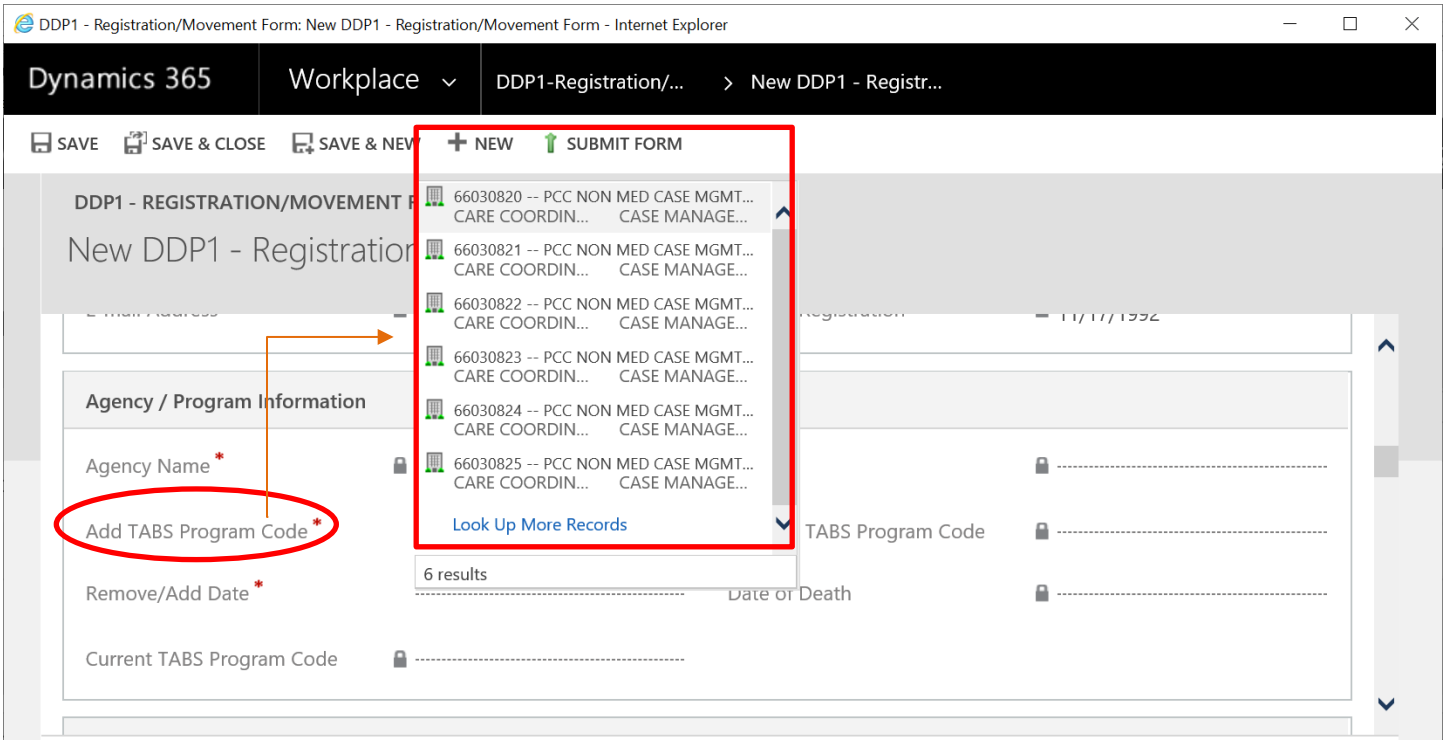


This will open a new DDP1 for this person.

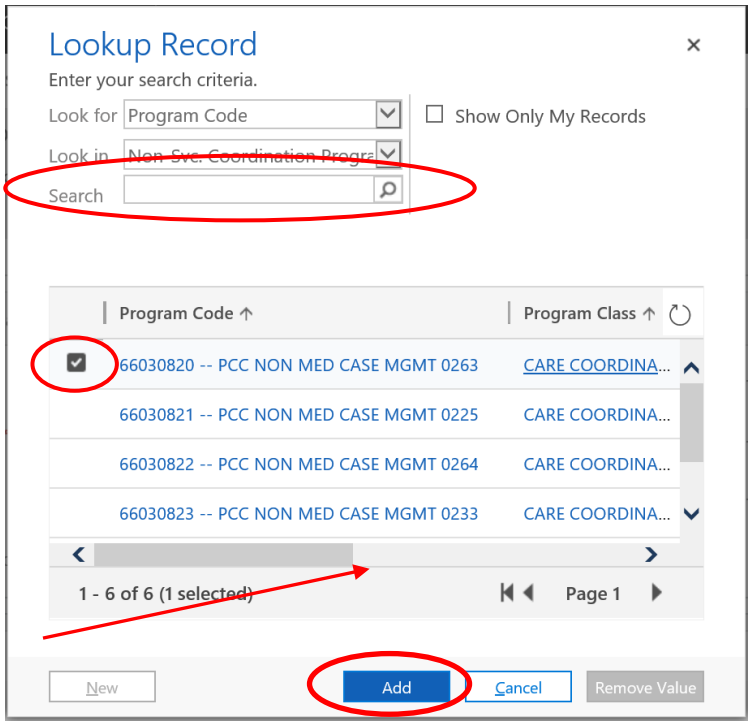
Fields that have a dotted line are fields that you can fill in. Fields that have a padlock icon are locked and you cannot edit them.



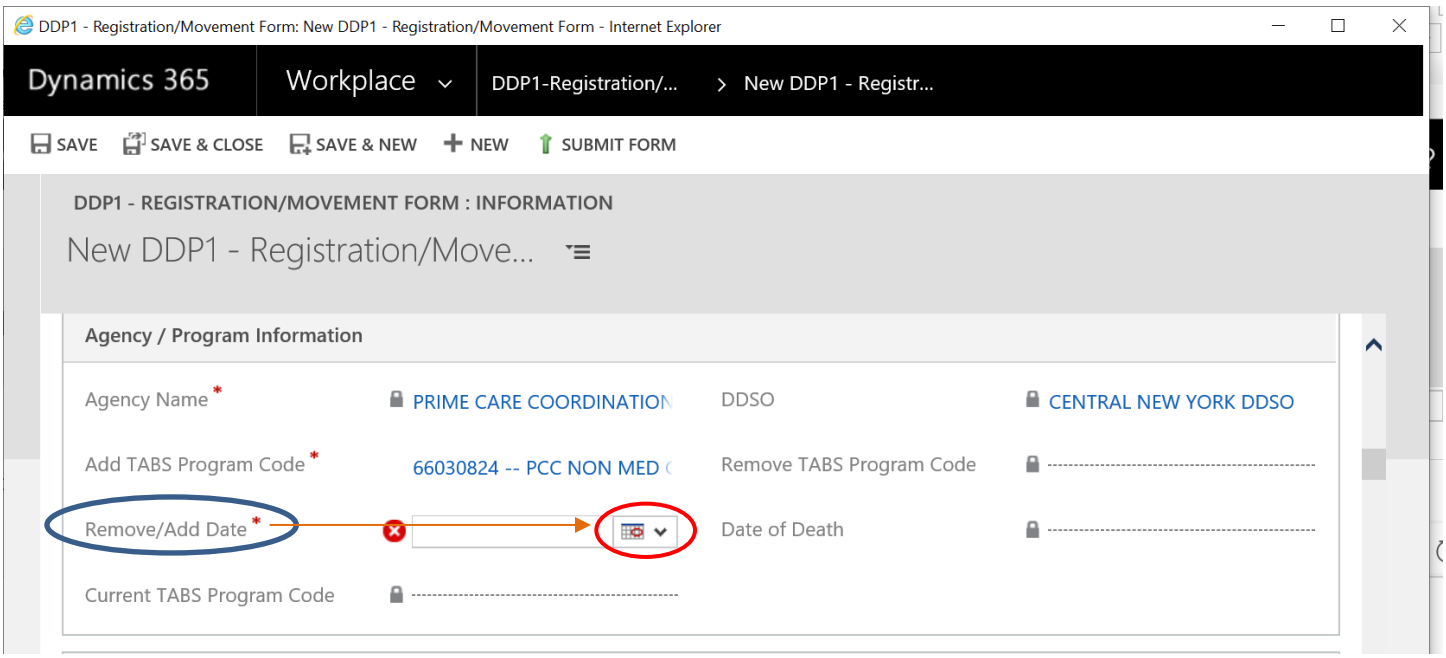
Other fields will have selections that have drop downs. If you do not see the selection you wish to make, scroll to the bottom of the list and click **Look Up More Records**. See the **Add TABS Program Codes** for an example.



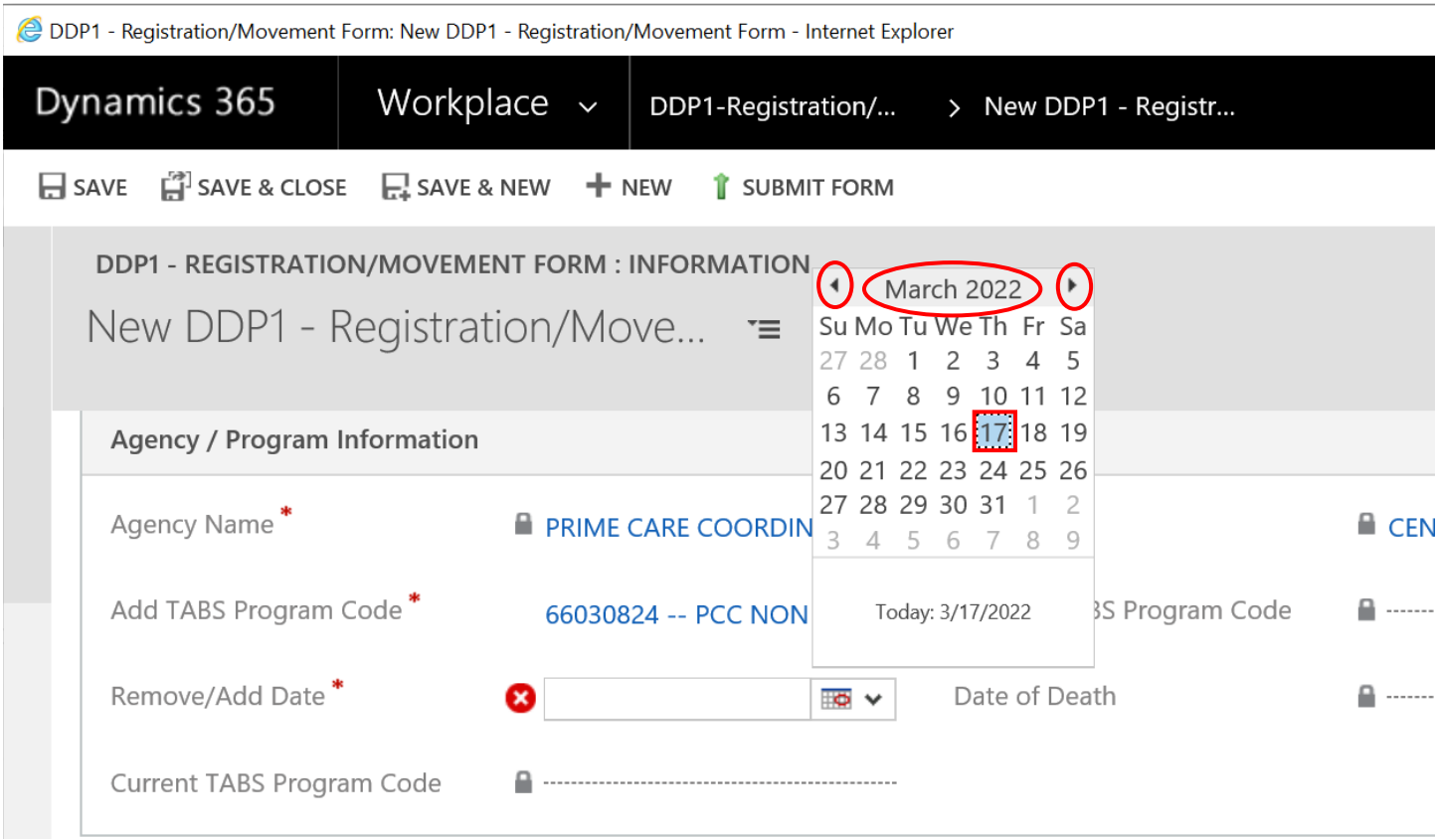
From the Look Up Records popup, you can search for the program code in the Search box select the Program you would like by clicking to the left of the box and then click Add, to add that record to the **Add TABS Program Code** field. You will then return to the form.



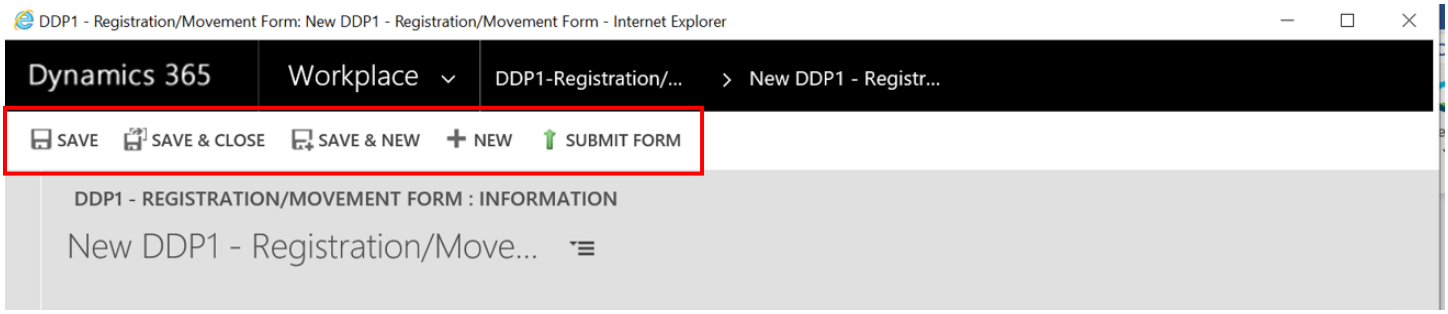
Fields like the **Remove/Add Date** have calendar features, where you can click the calendar to add the date.



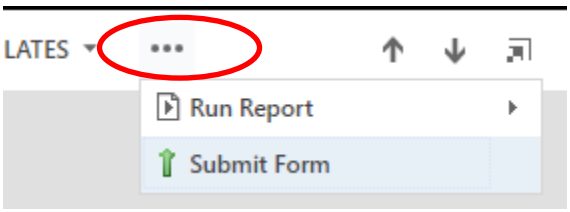
Click the Month and Year to change to a different year and use the scroll bars to move through months. Once you find the date, click on the day to select it.



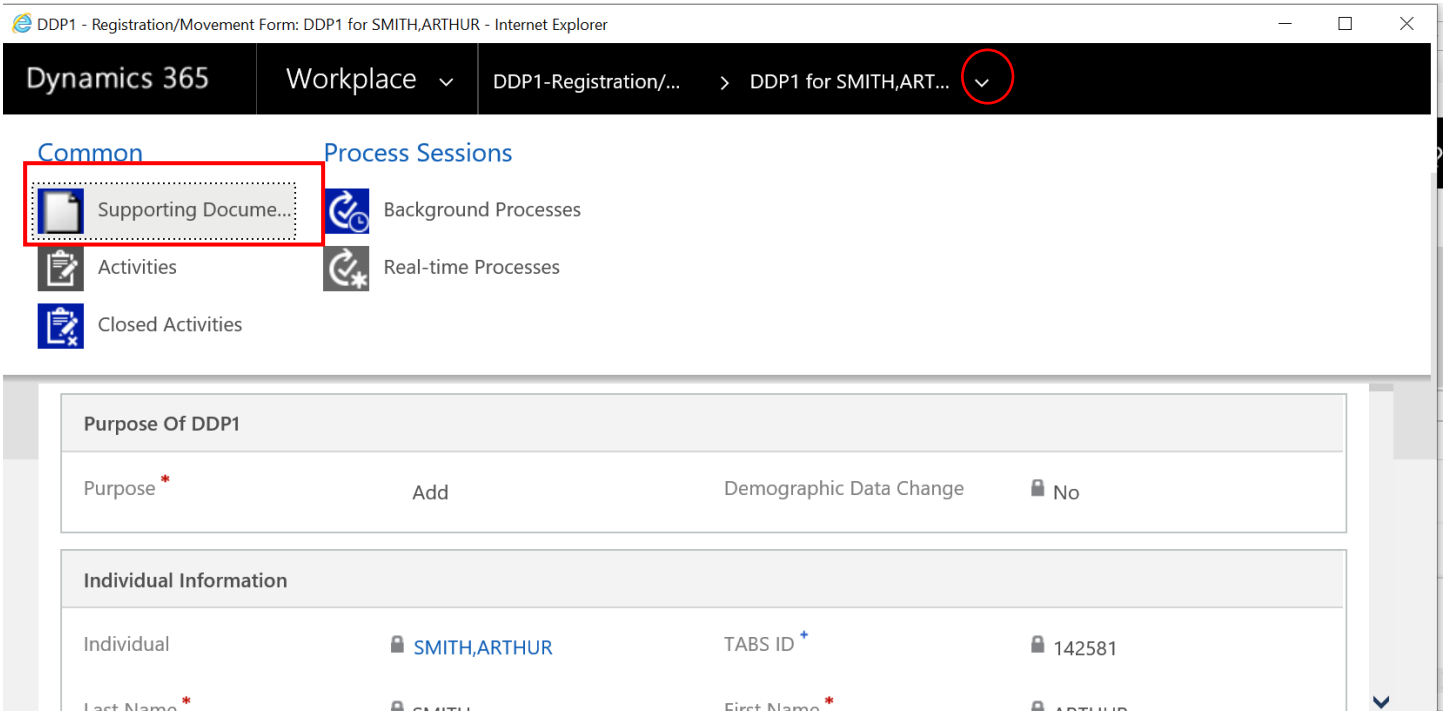
To save and submit a form, use the ribbon at the top of the field.



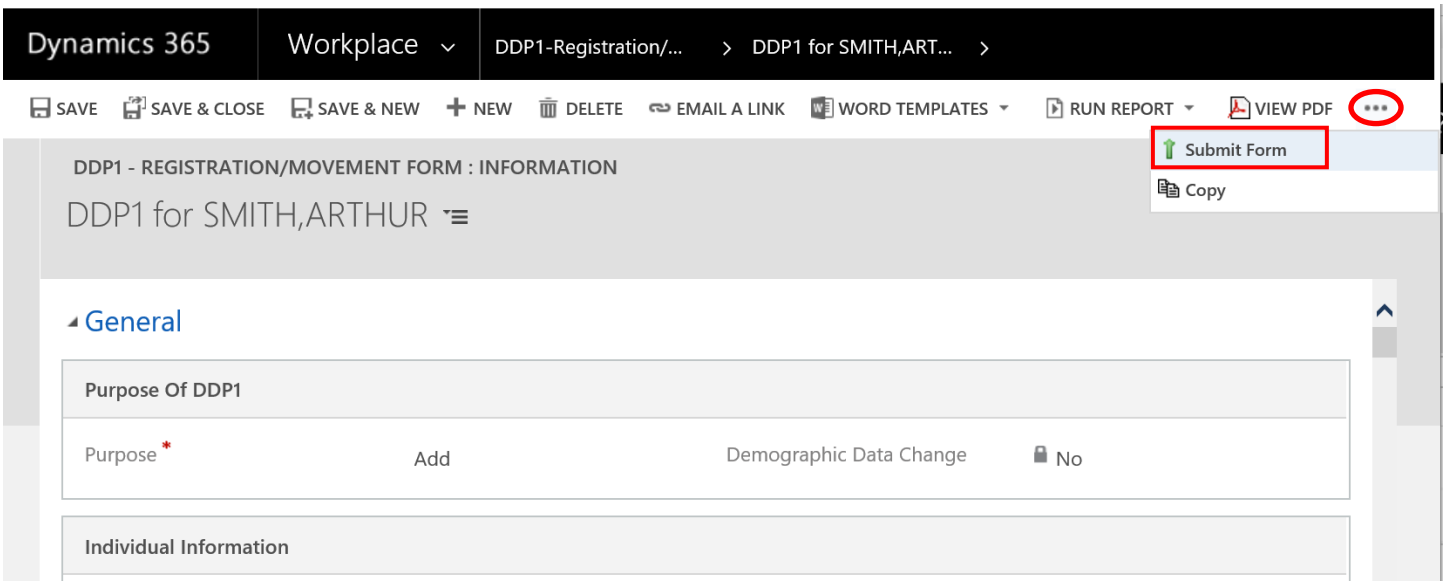
On some forms, more buttons are available after the ellipsis.



Once you Save a form, additional forms and screens may become available, such as Supporting Documents. Click the down arrow to view these.



After you save a form, you can submit it by clicking Submit Form.



If necessary, OPWDD users will review the form and approve, deny or return the form.

> **Note** once a form is submitted, users should scroll to the bottom of the form to review the TABS Messages. TABS Messages are success and/or error messages sent by TABS when it processes forms. Please note the date and time of these messages. It is possible to see an error message for a form that was later resubmitted successfully.

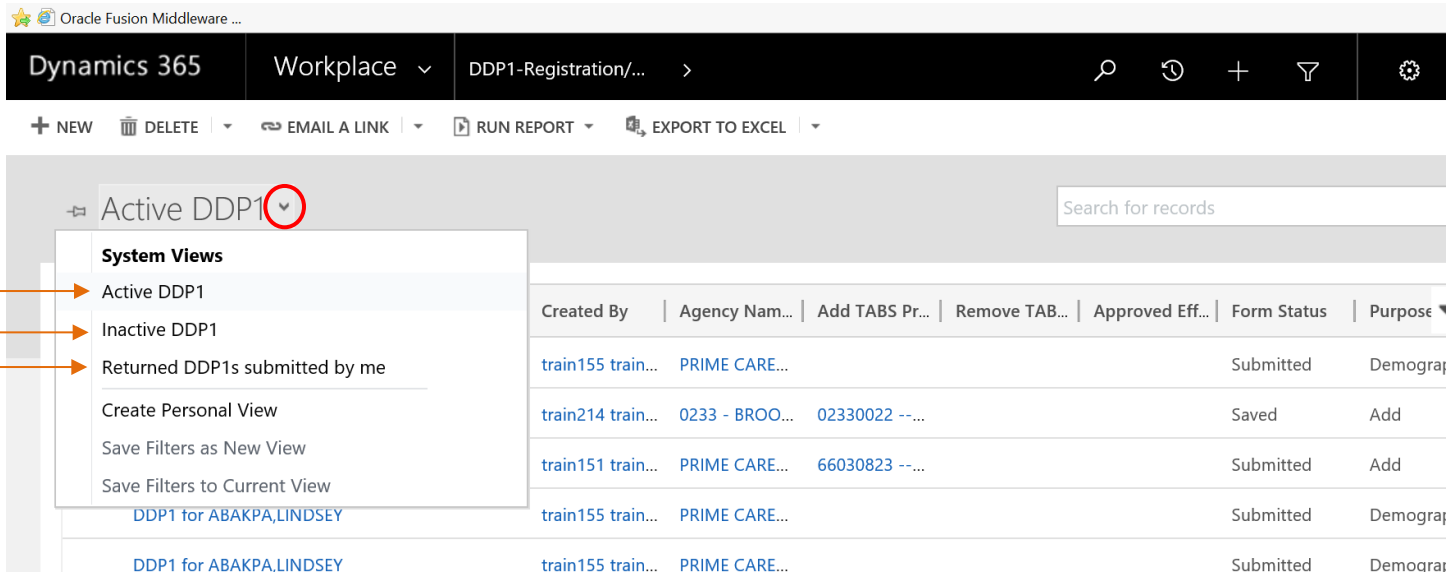
Other Icons available on forms:

- View PDF The **View PDF** button allows you to create a PDF version of a form for viewing and printing.
- Copy The **Copy** button allows you to create an editable copy of an existing form and then save it as a new completed form. This allows for information not to have to be re-typed.
- DELETE The Delete button allows you to delete a saved form. Once a form has been submitted or processed, it cannot be deleted.
- EMAIL A LINK The Email A Link button allows you to share the form with other CHOICES users.

System Views for Forms

The list of forms that are available on each screen can be changed. To change the View click the arrow next to the Active View and choose the other displayed views.

For example you can change the view on the DDP1 screen to **Active DDP1**, **Inactive DDP1s**, **Returned DDP1s that you submitted**, or create personal views.



Active will display only those forms with an Active Status. This means that the form is only Saved or Submitted and has not been finalized.

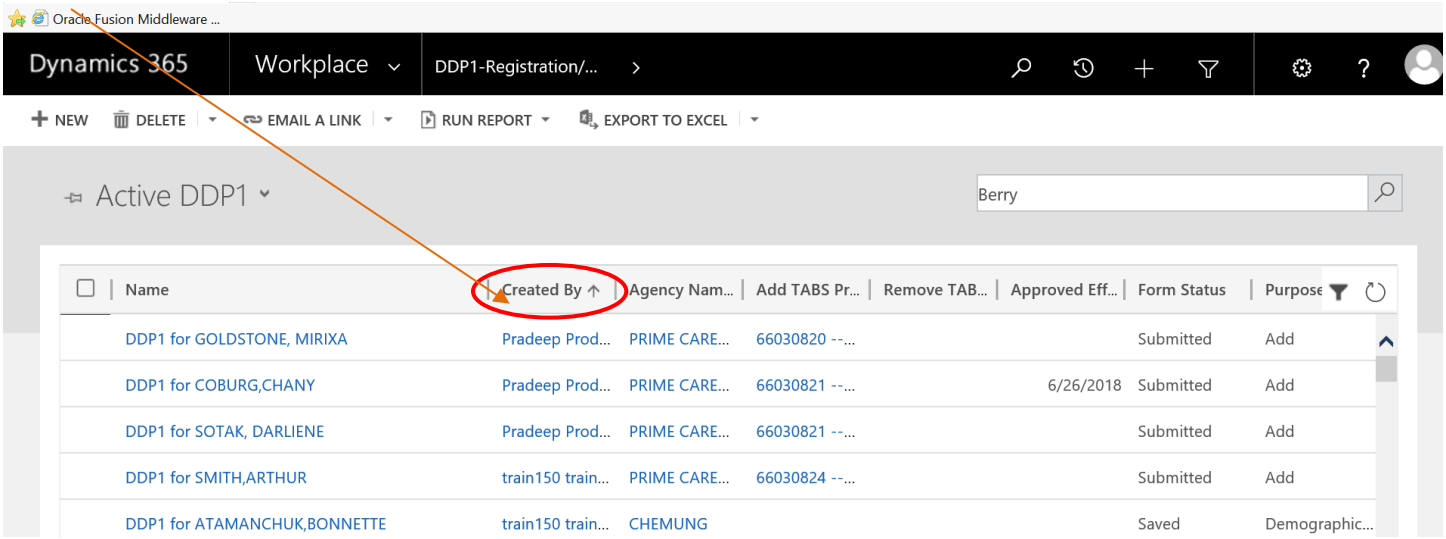
Inactive will display only those forms with an Inactive Status, such as those that were returned, processed, approved, or denied.

Filtering and Sorting Forms

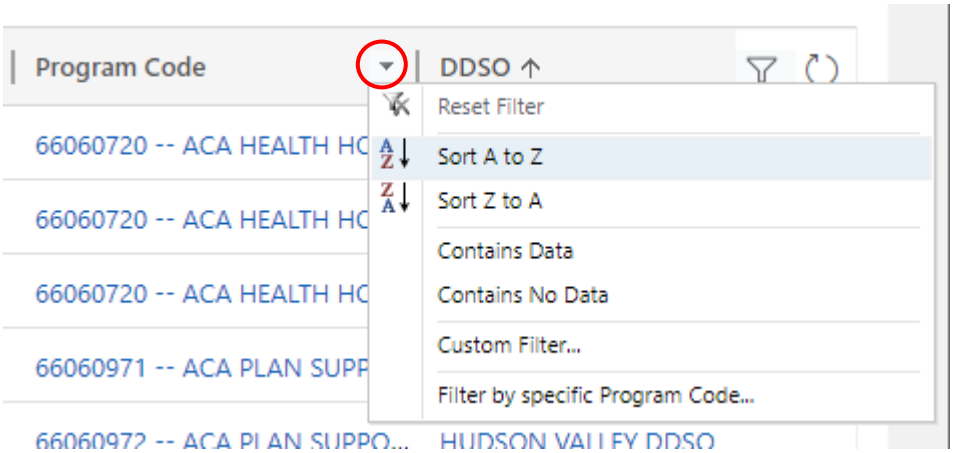
To sort a list of forms, such as DDP1s, you may have been working on.

A list of forms has various column headings that allows the user to sort or filter the information by that field. Click on the column heading to sort by that field. Clicking two times on the column will reverse the sort order.

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



To filter by one of the field headings. Click the funnel to the left of the columns: . Arrows will appear after each heading. Clicking on the arrow will provide a drop down menu with options to filter the data.

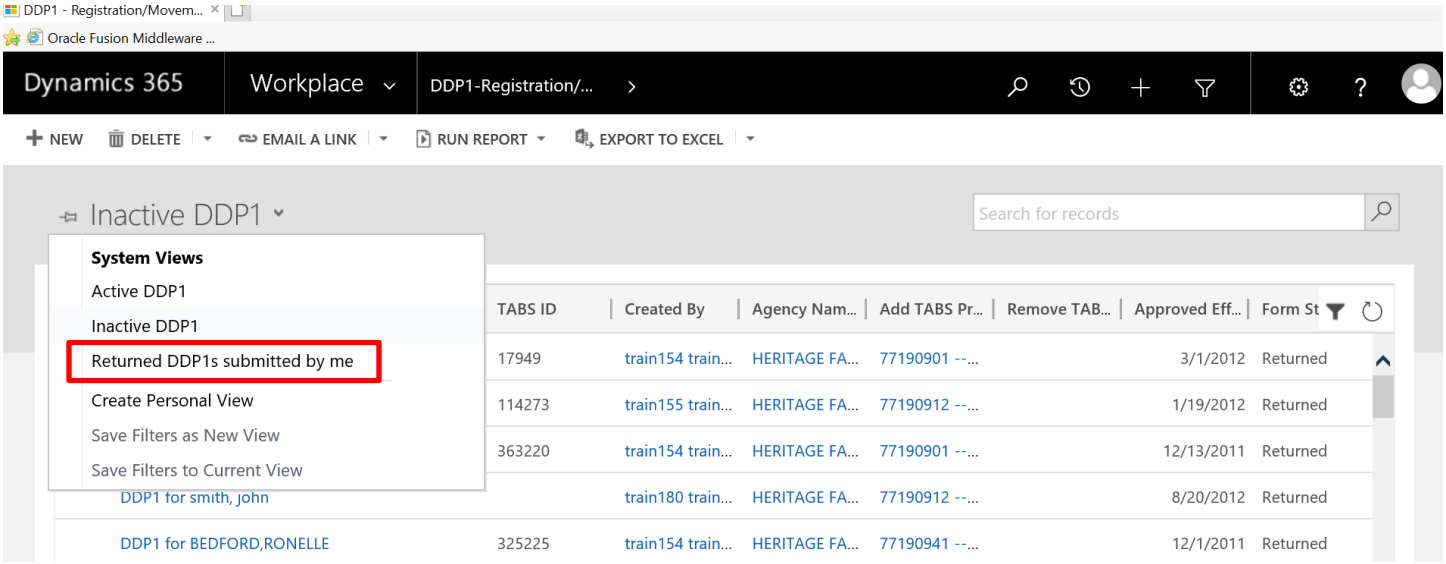


Returned Forms

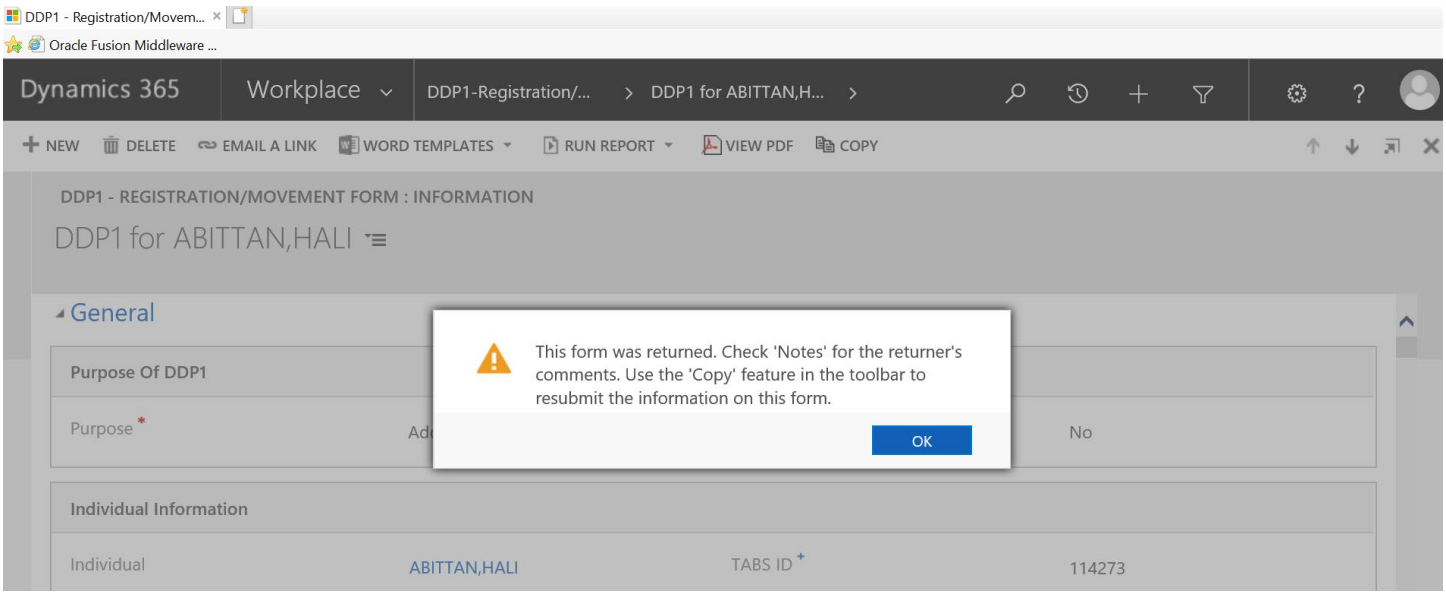
Go to the Inactive section of a Forms list.

Returned forms are always assigned a status of Inactive.

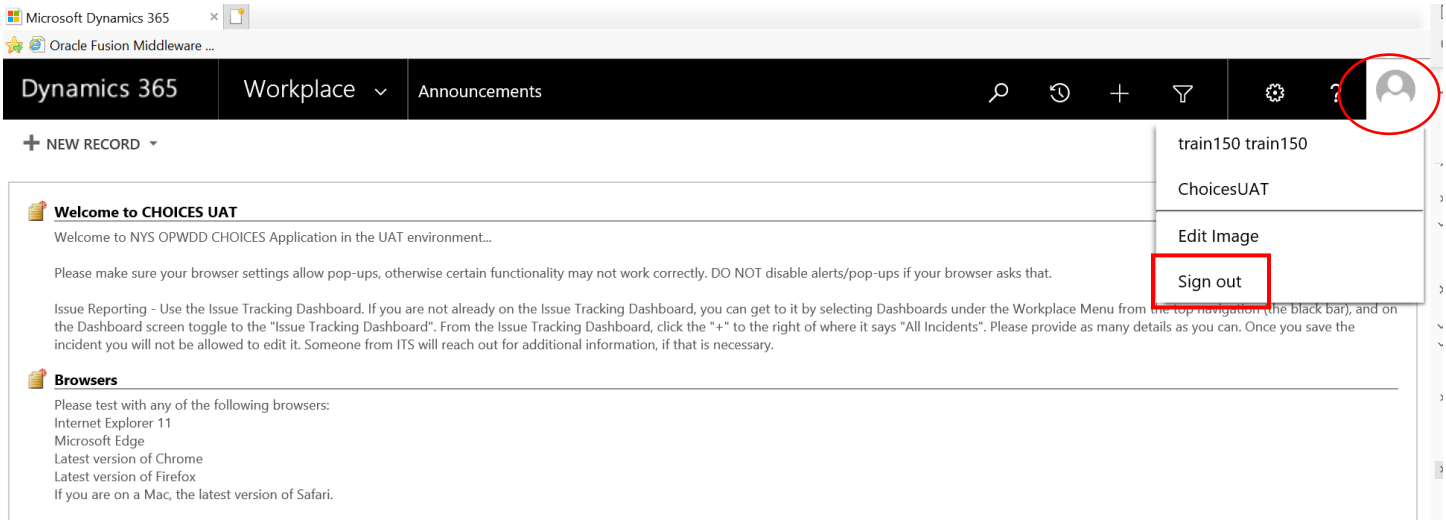
The DDP1 Section, has a unique Returned DDP1s submitted by me (the user signed in) view.



If a form is returned and needs to be resubmitted, it must be copied and the new form submitted. You cannot resubmit the original returned form, copy it, fix the mistakes or provide the requested information and then resubmit.



Sign Out

To Sign out of CHOICES, click the icon that looks like a person at the top of the page,

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