



# Office for People With Developmental Disabilities

## CCO1 Enrollment Form User Guide

## CCO1 Enrollment 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 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.

Click on CCO1-CCO Enrollme... under Forms.

The screenshot displays the Dynamics 365 Workplace interface. The top navigation bar includes 'Dynamics 365', 'Workplace' (highlighted with a red circle), and 'Announcements'. Below the navigation bar, the 'Workplace' section is active. The main content area is titled 'Welcome to CHOICES UAT' and contains four columns: 'My Work', 'People', 'Agencies', and 'Forms'. The 'Forms' column contains several document icons, with 'CCO1-CCO Enrollme...' highlighted by a red circle. Other forms listed include 'ELI-Transm', 'CCO2-CCO Disenroll...', 'LCED-ICF/II', 'DDP1-Registration/...', 'LCED-LCED', 'DDP1s-DDP1 Supol...', and 'Document:'. The bottom of the screen shows the latest version of Chrome and Firefox.

## 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 Dynamics 365 interface for 'Workplace' > 'CCO1-CCO Enrollment'. The current view is 'Active CCO Enrollments'. A dropdown menu is open, showing 'System Views' with 'Active CCO Enrollments' and 'Inactive CCO Enrollments' options. The 'Inactive CCO Enrollments' option is highlighted with a red box. An orange arrow points to the dropdown arrow next to the current view name. The table below shows a list of active enrollments with columns: ABS ID, Program Code, DDSO, CCO Effective Dat., and Modified On.

ABS ID	Program Code	DDSO	CCO Effective Dat.	Modified On	
43239	66060974 -- ACA PLAN SUPPO...	METRO NEW YORK DDSO	3/1/2019	2/21/2019 10:37 ...	
64370	66060971 -- ACA PLAN SUPPO...	BROOKLYN DDSO	7/1/2018	6/12/2018 1:36 PM	
72168	66060972 -- ACA PLAN SUPPO...	HUDSON VALLEY DDSO	9/1/2018	8/27/2018 10:08 ...	
CCO1 for VIGIL-NOLASCO,JAMIELA	202140	66060725 -- ACA HEALTH HO...	STATEN ISLAND DDSO	7/1/2018	6/15/2018 2:23 PM
CCO1 for DAUCHER, AMWARRE	202136	66060720 -- ACA HEALTH HO...	BERNARD M. FINESON DDSO	7/1/2018	6/15/2018 2:24 PM
CCO1 for OTT, BROOKLYN-CCO	364372	66060720 -- ACA HEALTH HO...	BERNARD M. FINESON DDSO	7/1/2018	6/13/2018 12:26 P...
CCO1 for OTT, JAMES-CCO	364371	66060720 -- ACA HEALTH HO...	BERNARD M. FINESON DDSO	7/1/2018	6/12/2018 3:12 PM
CCO1 for RAMSHOOK, CASSON	202143	66060970 -- ACA PLAN SUPPO...	BERNARD M. FINESON DDSO	8/1/2022	7/13/2022 3:28 PM

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

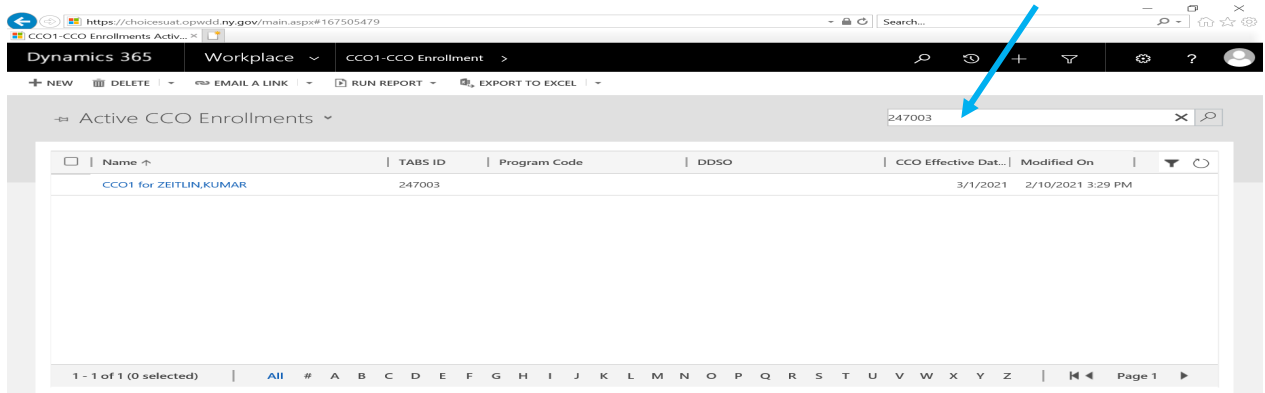
Each column on the list has a column header, which can be used to sort the list. Hover to highlight, then click to sort.

The screenshot shows the Dynamics 365 interface for 'Workplace' > 'CCO1-CCO Enrollment'. The current view is 'Inactive CCO Enrollments'. An orange arrow points to the 'Program Code' column header, which is highlighted. The table below shows a list of inactive enrollments with columns: Name, TABS ID, Program Code, DDSO, CCO Effective Dat., Modified On, and Status.

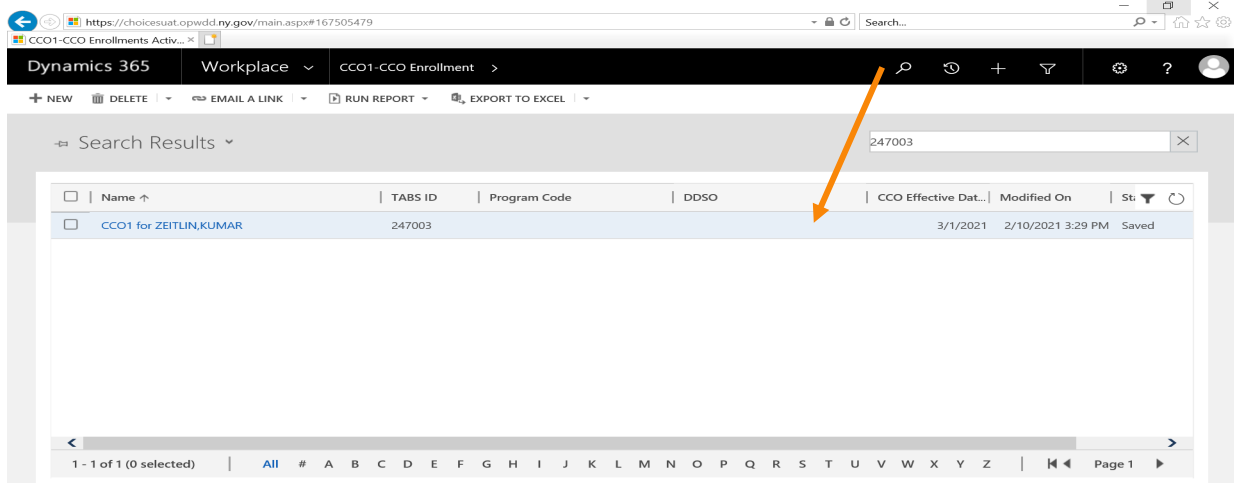
Name	TABS ID	Program Code	DDSO	CCO Effective Dat.	Modified On	St.
CCO1 for AACH,ROWANDA	86452	66030973 -- PCC PLAN SUPPO...	BROOME DDSO	2/1/2019	1/17/2019 11:16...	Processed
CCO1 for AGU, DIEGO	329575	66030973 -- PCC PLAN SUPPO...	BROOME DDSO	12/1/2018	11/9/2018 10:10...	Processed
CCO1 for MALL, HERBERT	363412	66030724 -- PCC HEALTH HO...	CENTRAL NEW YORK DDSO	8/1/2018	10/17/2018 12:32...	Processed
CCO1 for ALPETER, NAOMIA	238202	66030724 -- PCC HEALTH HO...	CENTRAL NEW YORK DDSO	12/1/2018	11/9/2018 10:10...	Processed
CCO1 for ANNIS,GILA	57885	66030723 -- PCC HEALTH HO...	BROOME DDSO	9/1/2018	10/17/2018 12:32...	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 results display. To open the record, hover to highlight, then double click on the line.



## 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:

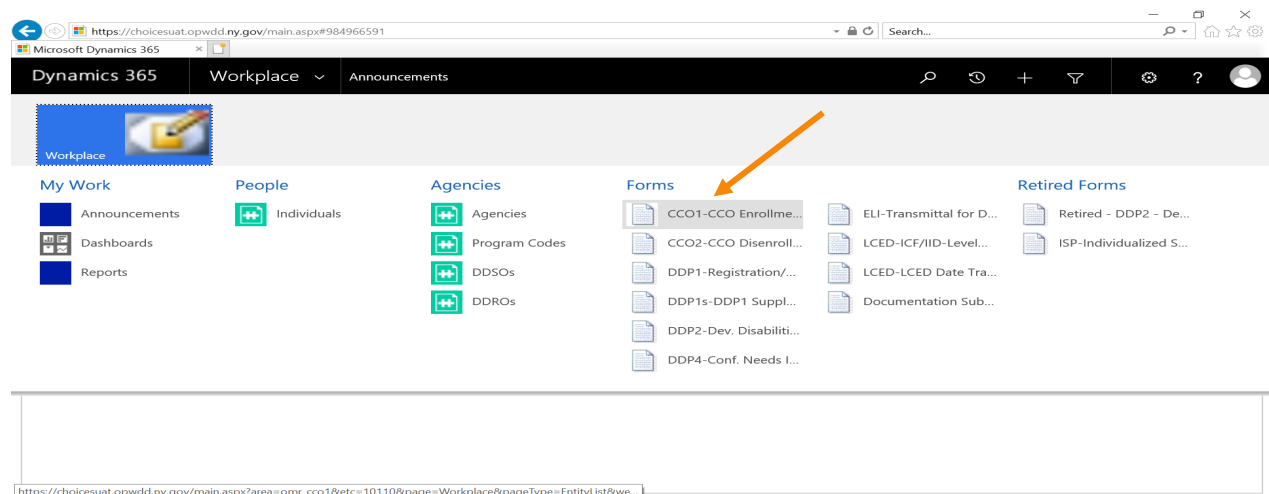
1. Saved – A saved form can be opened, edited and then saved or submitted.

Inactive status for the CCO1 form is:

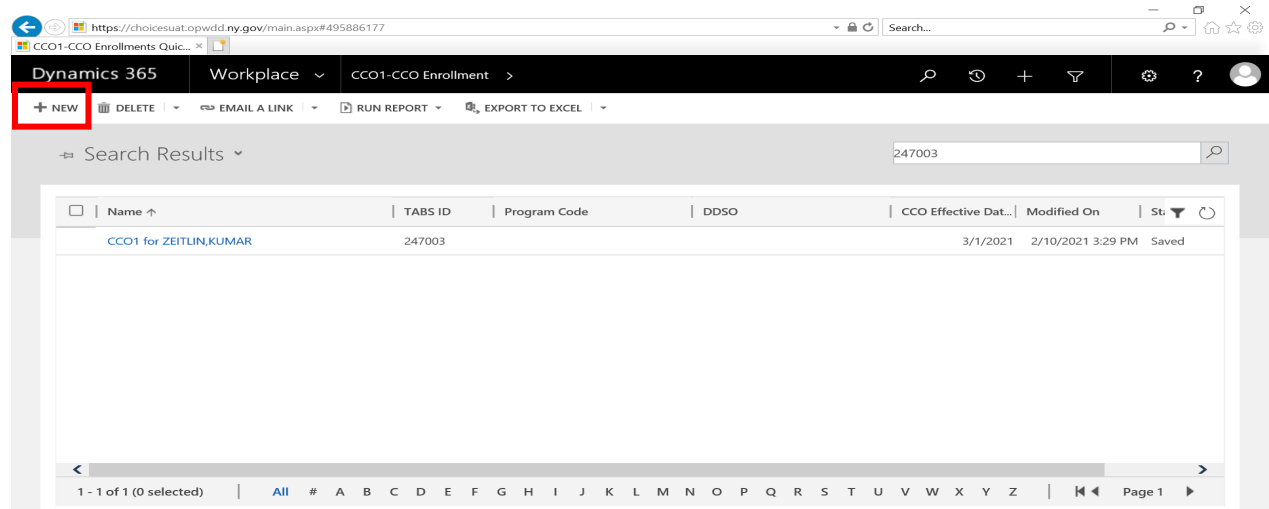
1. Processed – this form has been submitted and filed to TABS.

## Completing 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, so you will need to 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.

CCO1-CCO ENROLLMENT : INFORMATION  
New CCO1-CCO Enrollment

Individual Lookup

Lookup by TABS ID  
TABS ID: 202143

Lookup by other criteria (clear TABS ID to search by other criteria)

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_ Medicaid CIN: \_\_\_\_\_  
County: \_\_\_\_\_ Sex: \_\_\_\_\_  
Date Of Birth: \_\_\_\_\_

Lookup New Individual

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.

CCO1-CCO ENROLLMENT : INFORMATION  
New CCO1-CCO Enrollment

Individual Lookup

TABS ID	Name	Sex	Date of Birth	Social Security Number	Medicaid CIN
<a href="#">202143</a>	RAMSHOOK, CASSON	M	11/16/1983	0000002143	null

Back New Individual

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.

CCO1-CCO ENROLLMENT : INFORMATION  
New CCO1-CCO Enrollment

General

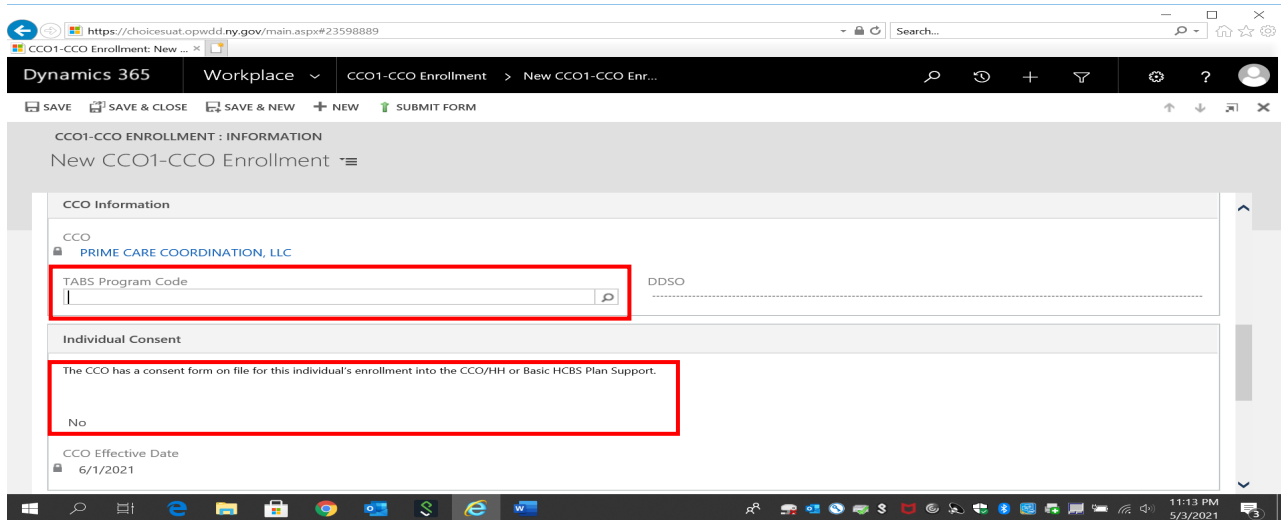
Individual Information

Individual  
TABS ID: 202143

Last Name: RAMSHOOK  
First Name: CASSON  
Middle Initial: \_\_\_\_\_  
Address Line 1: \_\_\_\_\_

Date of Birth: 11/16/1983  
Phone Number: \_\_\_\_\_  
Medicaid Number: \_\_\_\_\_  
State: \_\_\_\_\_

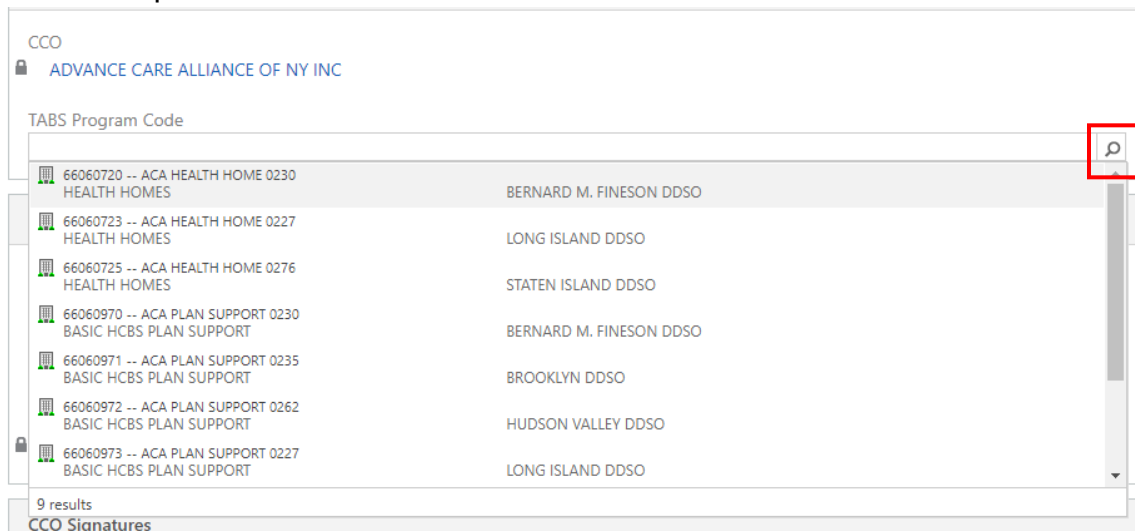
Only two fields, *TABS Program Code* and *Individual Consent*, need to be completed by the user to submit.



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

If the program code is not correct, once the CCO1 is submitted, an error message regarding the person not being registered in the DDSO will display and the enrollment will not occur.

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



The Look Up icon allows you to view all TABS Program Code fields. Scroll to the bottom of the list and click on “Look Up More Records” to find additional program codes.

CCO Information

CCO  
ADVANCE CARE ALLIANCE OF NY INC

TABS Program Code

66060970 -- ACA PLAN SUPPORT 0230 BASIC HCBS PLAN SUPPORT	BERNARD M. FINESON DDSO
66060971 -- ACA PLAN SUPPORT 0235 BASIC HCBS PLAN SUPPORT	BROOKLYN DDSO
66060972 -- ACA PLAN SUPPORT 0262 BASIC HCBS PLAN SUPPORT	HUDSON VALLEY DDSO
66060973 -- ACA PLAN SUPPORT 0227 BASIC HCBS PLAN SUPPORT	LONG ISLAND DDSO
66060974 -- ACA PLAN SUPPORT 0265 BASIC HCBS PLAN SUPPORT	METRO NEW YORK DDSO
66060975 -- ACA PLAN SUPPORT 0276 BASIC HCBS PLAN SUPPORT	STATEN ISLAND DDSO

Look Up More Records

9 results

CCO Signatures

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.

Dynamics 365 Workplace CCO1-CCO Enrollment > New CCO1-CCO Enr...

SAVE SAVE & CLOSE SAVE & NEW + NEW ↑ SUBMIT FORM

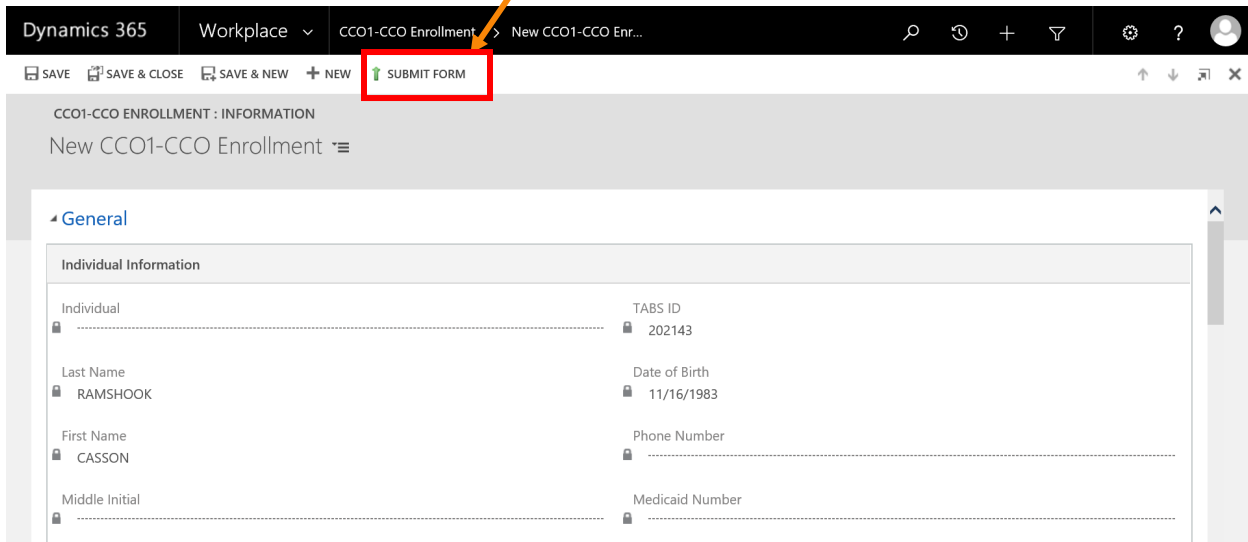
CCO1-CCO ENROLLMENT : INFORMATION

New CCO1-CCO Enrollment



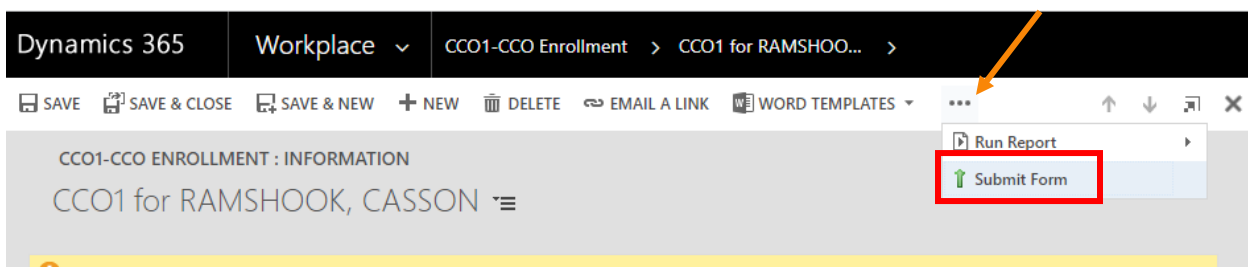
## Submit the Form

Click the “Submit Form” icon to submit the form.



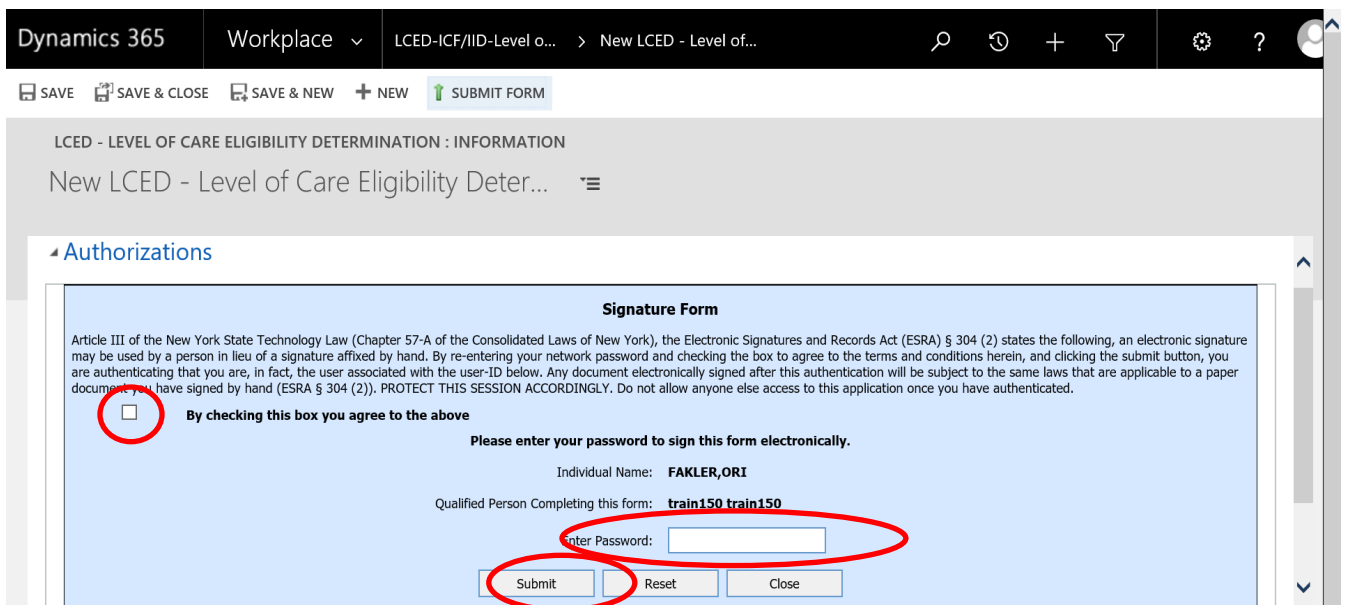
The screenshot shows the Dynamics 365 interface for a 'New CCO1-CCO Enrollment' form. The top navigation bar includes 'Dynamics 365', 'Workplace', and 'CCO1-CCO Enrollment'. The main header area contains 'SAVE', 'SAVE & CLOSE', 'SAVE & NEW', and a highlighted 'SUBMIT FORM' button with a red box around it. The form content is titled 'CCO1-CCO ENROLLMENT : INFORMATION' and 'New CCO1-CCO Enrollment'. The 'General' tab is active, showing 'Individual Information' with fields for Individual, Last Name (RAMSHOOK), First Name (CASSON), Middle Initial, TABS ID (202143), Date of Birth (11/16/1983), Phone Number, and Medicaid Number.

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



The screenshot shows the Dynamics 365 interface for a 'CCO1 for RAMSHOOK, CASSON' form. The top navigation bar includes 'Dynamics 365', 'Workplace', and 'CCO1-CCO Enrollment'. The main header area contains 'SAVE', 'SAVE & CLOSE', 'SAVE & NEW', '+ NEW', 'DELETE', 'EMAIL A LINK', 'WORD TEMPLATES', and a three-dot menu icon. A dropdown menu is open from the three-dot icon, showing 'Run Report' and a highlighted 'Submit Form' option with a red box around it. The form content is titled 'CCO1-CCO ENROLLMENT : INFORMATION' and 'CCO1 for RAMSHOOK, CASSON'.

The signature page will display after the user clicks, Submit. Read the informational paragraph, click the box noting – “By checking this box...”, enter your password and then click Submit button.



The screenshot shows the Dynamics 365 interface for a 'New LCED - Level of Care Eligibility Determination' form. The top navigation bar includes 'Dynamics 365', 'Workplace', and 'LCED-ICF/IID-Level of...'. The main header area contains 'SAVE', 'SAVE & CLOSE', 'SAVE & NEW', '+ NEW', and a highlighted 'SUBMIT FORM' button with a red box around it. The form content is titled 'LCED - LEVEL OF CARE ELIGIBILITY DETERMINATION : INFORMATION' and 'New LCED - Level of Care Eligibility Deter...'. The 'Authorizations' tab is active, showing a 'Signature Form' section. The signature form contains a paragraph of text, a checkbox (circled in red) with the text 'By checking this box you agree to the above', a password field (circled in red) with the text 'Please enter your password to sign this form electronically.', and a 'Submit' button (circled in red) along with 'Reset' and 'Close' buttons. The form also displays 'Individual Name: FAKLER,ORI' and 'Qualified Person Completing this form: train150 train150'.

Once the form has completed processing to TABS, a yellow line displays at the bottom of the form with "Inactive" noted. The user must then read the TABS Warning messages.

The screenshot shows the Dynamics 365 interface for a CCO1-CCO Enrollment form. The breadcrumb trail is: Dynamics 365 > Workplace > CCO1-CCO Enrollment > CCO1 for BENTHALL... The form title is "CCO1-CCO ENROLLMENT: INFORMATION" and the subject is "CCO1 for BENTHALL, CHRISE".

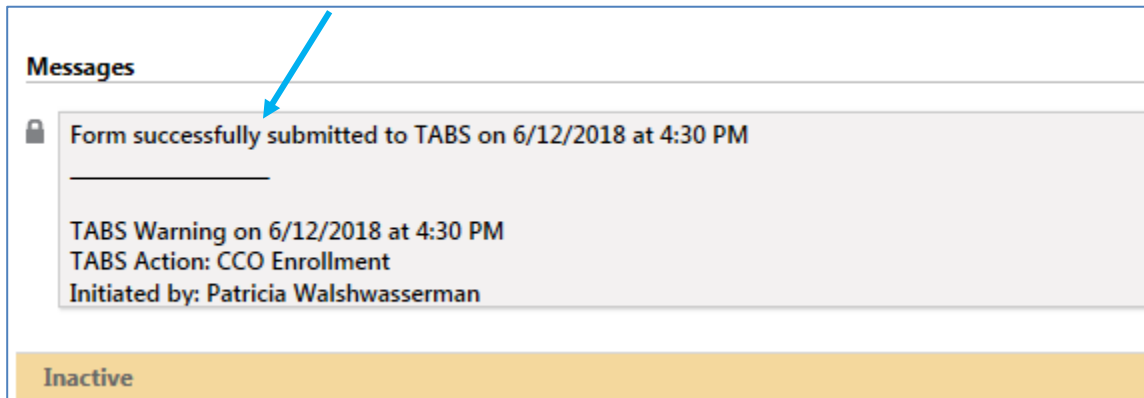
The form contains the following sections:

- Individual Consent:** States "The CCO has a consent form on file for this individual's enrollment into the CCO/HH or Basic HCBS Plan Support." with a "Yes" response and a "CCO Effective Date" of 7/1/2018.
- CCO Signatures:** States "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." It lists "CCO Contact: Pradeep Proddutoon" and "CCO Contact's Electronic Signature: Pradeep Proddutoon on 06/15/2018".
- Messages:** Contains two messages: "Form successfully submitted to TABS on 6/15/2018 at 2:28 PM" and "TABS Warning on 6/15/2018 at 2:28 PM".

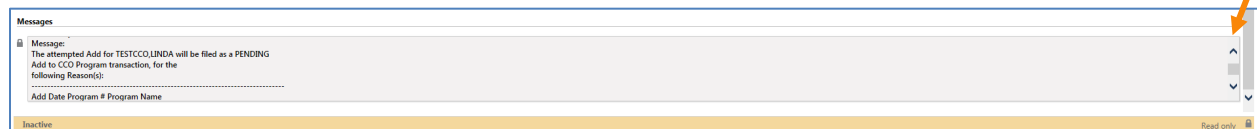
A yellow bar at the bottom of the form indicates the status is "Inactive".

## 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 1<sup>st</sup> of the next month.

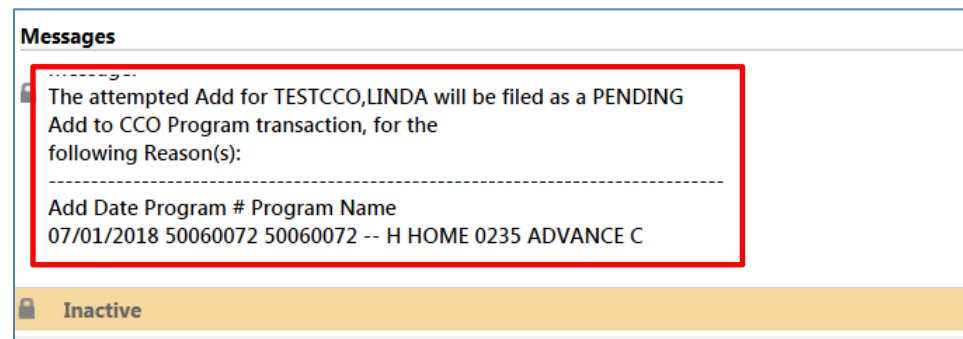


To view the whole message, use the scroll bar at the end of the message box, not the form's scroll bar.



Possible Messages are:


"PENDING Add to CCO..." is a valid message since the add is always the 1<sup>st</sup> of the next month. A user does not need to take any action



FUT means that the individual will be enrolled the first of the next month if there are no other errors (e.g.. TABS messages). A user does not need to take any action

LOC 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 1<sup>st</sup> 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)

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**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


MCD means that the individual does not have Medicaid Eligibility

ELG means that the individual does not have an OPWDD eligibility status that allows them to be enrolled into the program code.

With these errors, enrollment will pend the enrollment until the issue is fixed. Enrollment will be the 1<sup>st</sup> of the month following the fix being filed.

**Messages**

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