NEW YORK STATE | Office for People With Developmental Disabilities

User Guide

Capacity Management Application (CMA)

Care Coordination Organization User Guide with Screenshots

Date: May 2026

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Background, Purpose, and Disclaimer

Capacity Management Application (CMA) is an application to manage housing and/or funding for persons served by OPWDD. Both certified and non-certified housing subsidies are included in this application. This system will provide OPWDD users and its regional offices a comprehensive view of capacity requirements and availability; automated processes that will allow staff to direct focus on serving OPWDD eligible people seeking housing more efficiently and effectively.

The new application/enhancement will support the Certified Residential Administrative Memorandum. This document reflects a portion of the functionalities available in the new application/enhancement with screenshots.

Glossary of Terms

Term	Definition
AssignedHL	The Housing Liaison (HL) assigned to the Referral Packet
AROC	Access to Residential Opportunities Committee
BU	Business Unit
CCO-CM	Care Coordination Organization – Care Manager(s)
CRO	Certified Residential Opportunities
Designation Categories	Designation Categories: • Current Need (CN) • Substantial Need (SN) • Emergency Need (EN)
Designation Review Committees	Initial DRC = Initial Designation Review Committee Core DRC = Core Designation Review Committee
FSS	Family Support Services
HL	Housing Liaison
HL Assigner	Housing Liaison Assigner
HL Manager	Housing Liaison Manager/Supervisor (Chair)
In-flight Packet	Packets that are in progress. They are neither complete nor closed/canceled.
Institutional Setting	Coming from an ITO (Developmental Centers), Nursing Home, Psychiatric Center, Hospital, Residential School, ICF.
OPWDD	Office for People with Developmental Disabilities OPWDD is responsible for coordinating services to New Yorkers with developmental disabilities; including intellectual disabilities, cerebral palsy, down syndrome, autism spectrum disorders, and other neurological impairments.
H004	Notification of Residential Support Category
H005	Residential Referral Form
NOD15	Notice of Decision Letter
SL	Specialty Liaison

Statuses

Packet Status	Definition
Unsubmitted Draft	Referral packet is in process with the Care Manager. The H005 and related documents are not yet "Finalized" and submitted to OPWDD for review.
Packet Submitted	Referral packet contents are "Finalized" by the Care Manager and submitted to OPWDD for review.
Missing Information Sent 1	Referral packet previously "Packet Summitted" where the AssignedHL has identified that items were missing information and marked "Needs Review". The packet status updates to "Missing Information Sent 1" The packet status' number starts at "1", then increases up to "3" every 30 days the returned packet stays in the submitter's workload and is not resubmitted. There are a maximum of 3 reminders, totaling 90 days.
Missing Information Sent 2	After 30 days with no resubmission, system updates "Missing Information Sent 1" to "Missing Information Sent 2".
Missing Information Sent 3	After 30 days with no resubmission, system updates "Missing Information Sent 2" to "Missing Information Sent 3". After the 90th day without resubmission, the system will automatically resubmit the packet to the "Resubmitted to Housing Liaison" status for OPWDD to continue review.
Resubmitted to Housing Liaison (in response to Missing Information)	Referral packet previously "Missing Information Sent" has been resubmitted for OPWDD Housing Liaison review.
Referral Packet All Items Present	Referral packet submitted or resubmitted by the Care Manager. OPWDD has reviewed and packet can move forward.
CRO Review Team / Initial Designation Team	Referral packet (New or Redesignation) has reached the review step for Initial DRC to be conducted.
Core Designation Committee	Referral packet (New or Redesignation) has reached the review step for Core DRC to be conducted.
Request for More Information	Referral packet at "Core Designation Committee" where OPWDD has identified that more information is required to make a decision. Packet items marked as "Missing Information" and/or "Needs Review". Packet is returned to the Care Manager to update and resubmit within 30 days. After the 30th day passes without resubmission, the system will automatically resubmit the packet with the "Resubmitted to Committee" status for OPWDD to continue review.
Resubmitted to Committee (in response to Request for More Information)	Referral packet (New or Redesignation) previously "Request for More Information" has been resubmitted for OPWDD Core Committee review and decision.

Packet Status	Definition
Complete	Referral packet has reached the end of its system lifecycle, where: • Packet been reviewed by OPWDD Committee and decision has been determined for new packets or redesignation packets. • Yearly Update packet has completed.
Closed/Canceled	Referral packet was closed/canceled due to: • The person's "Individual Status" has been set to "=Closed" through the "Change Status" functionality. • The packet was sent to OPWDD for Yearly Update review and upon resubmission of "missing information" was determined to have insufficient information. Packet record is then "Closed/Cancelled"

Individual Status	Definition
Pending	A referral packet is process.
Active	A referral packet has been submitted for the person, determination made with designation category and referral packet is updated and current.
Inactive	A referral packet has been submitted for the person, determination made with designation category and the referral packet is outdated.
Closed	Person is not seeking certified residential services at this time.

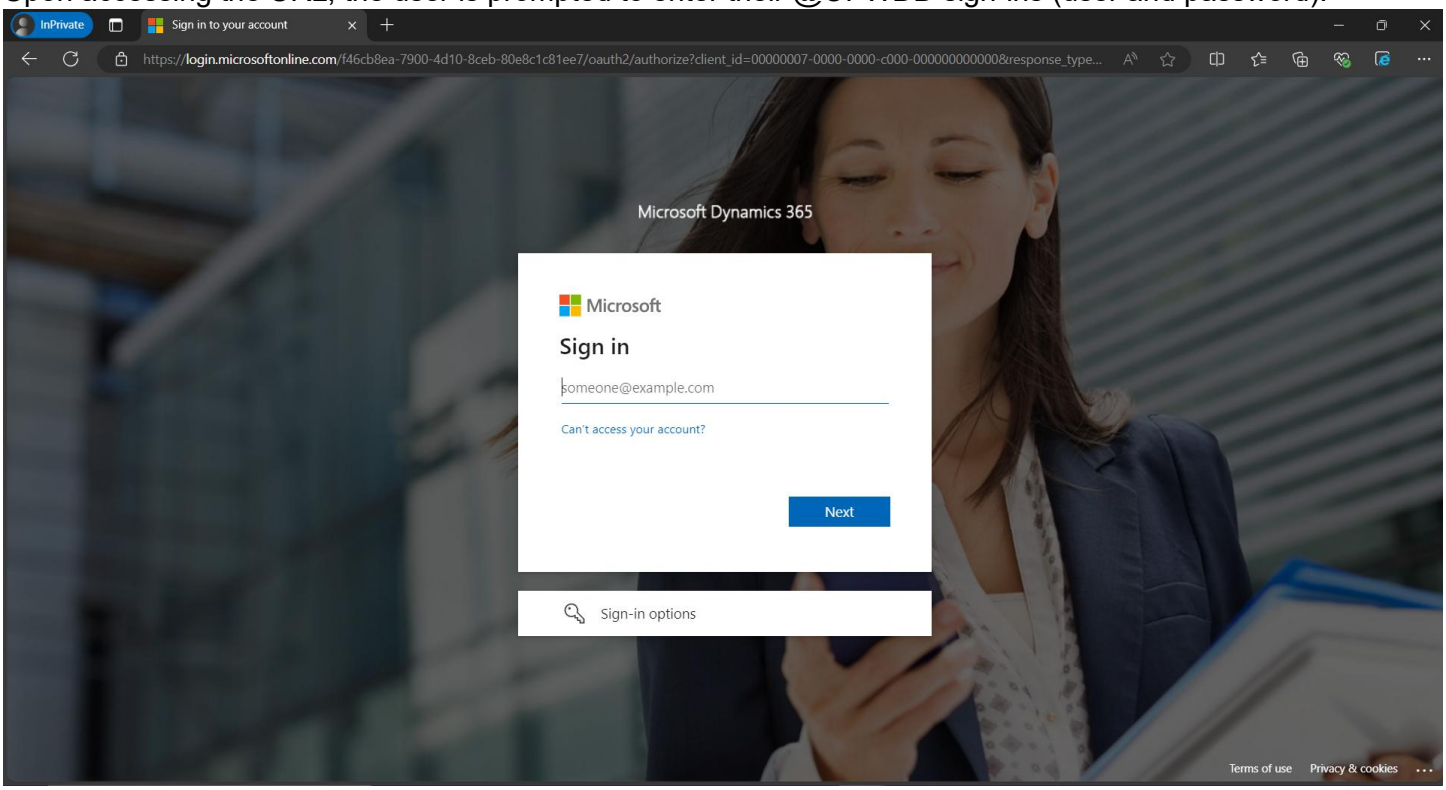
H005 CRO Referral Status:	Definition
Draft	H005 was started but has not been completed and finalized.
Missing Information	Care Manager will need to review form and update for incomplete or missing information and re-finalize.
Finalized	Care Manager has entered and reviewed all required information. Finalized H005 Forms cannot be unlocked for editing. H005 must be finalized before packet record can be submitted.

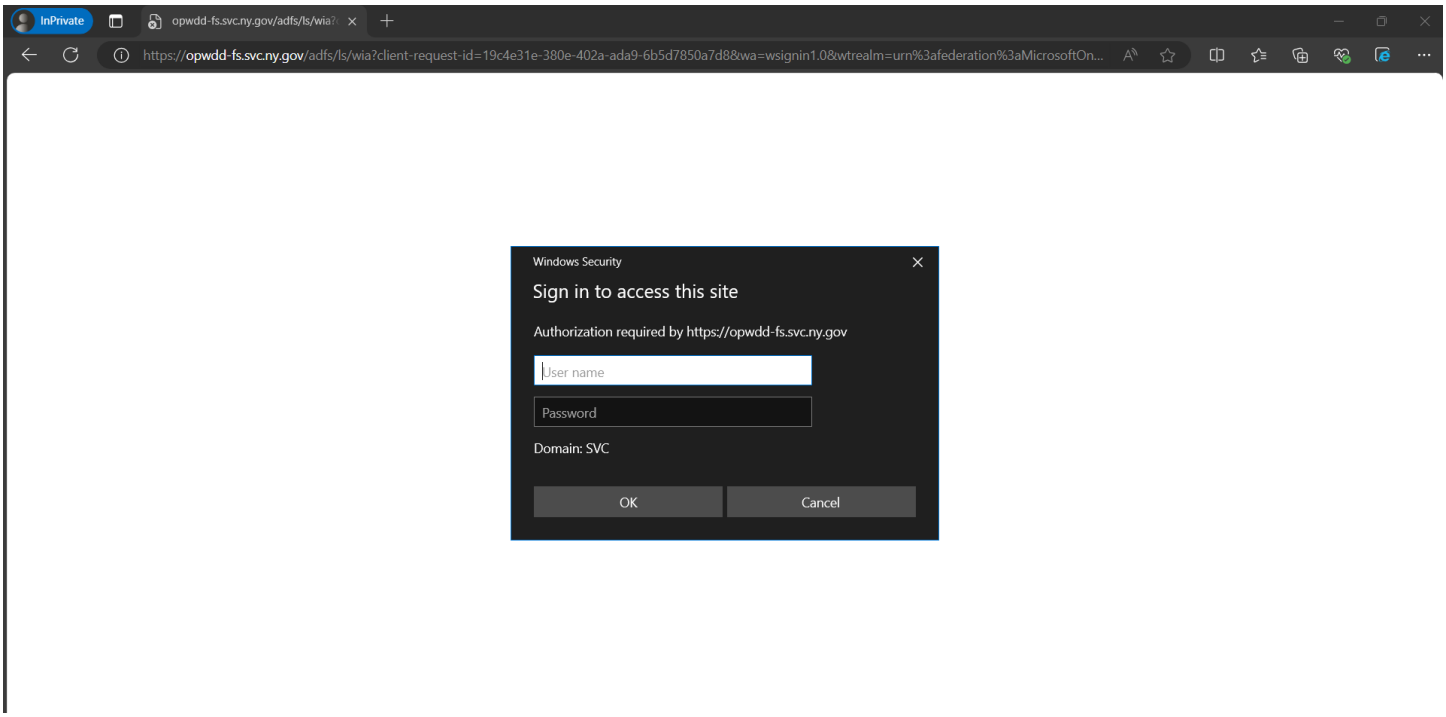
CRO Documents Status:	Definition
Upload a document	The document *has not* yet been uploaded or *has been* uploaded but not yet finalized (Draft Form).
Needs Review	The OPWDD Certified Housing Team determined that some action needs to be completed before the document can be finalized.
Finalized	The document has been completed, saved, and attached.

Logging in

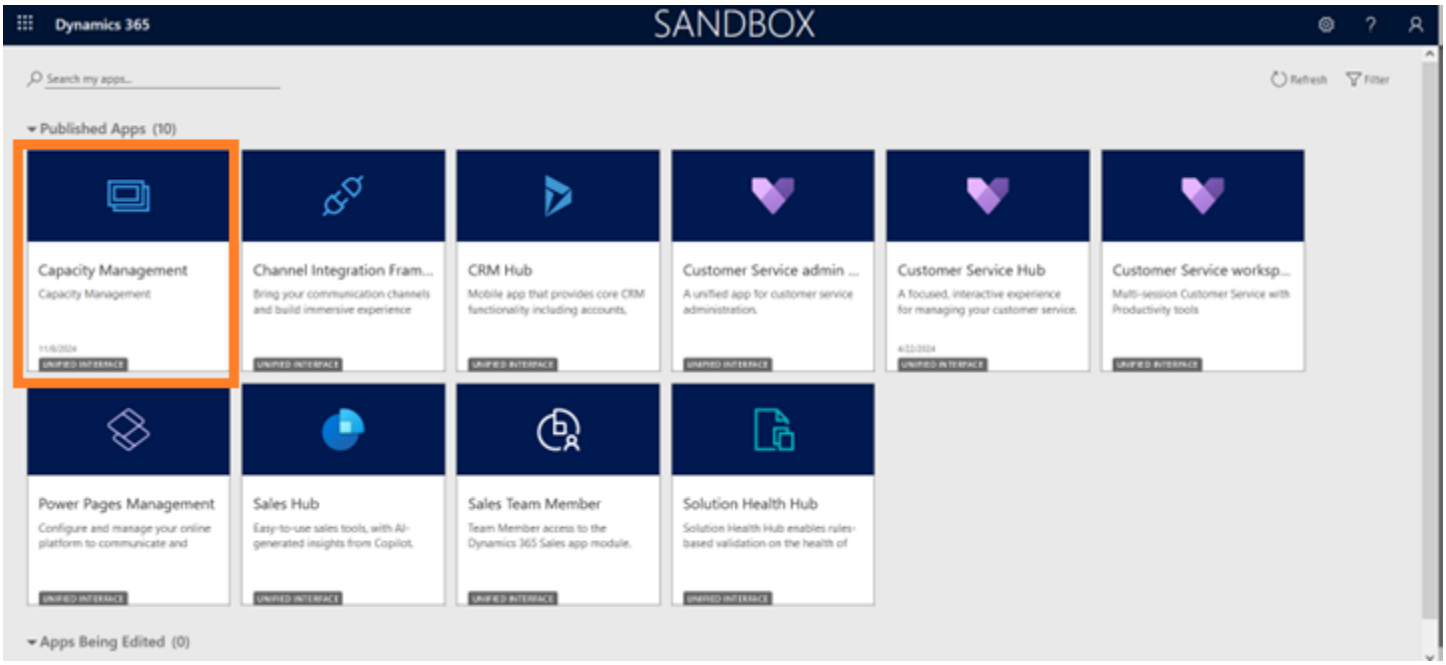
Using your web browser, go to https://nysopwddcma.crm9.dynamics.com/

Upon accessing the URL, the user is prompted to enter their @OPWDD sign-ins (user and password).

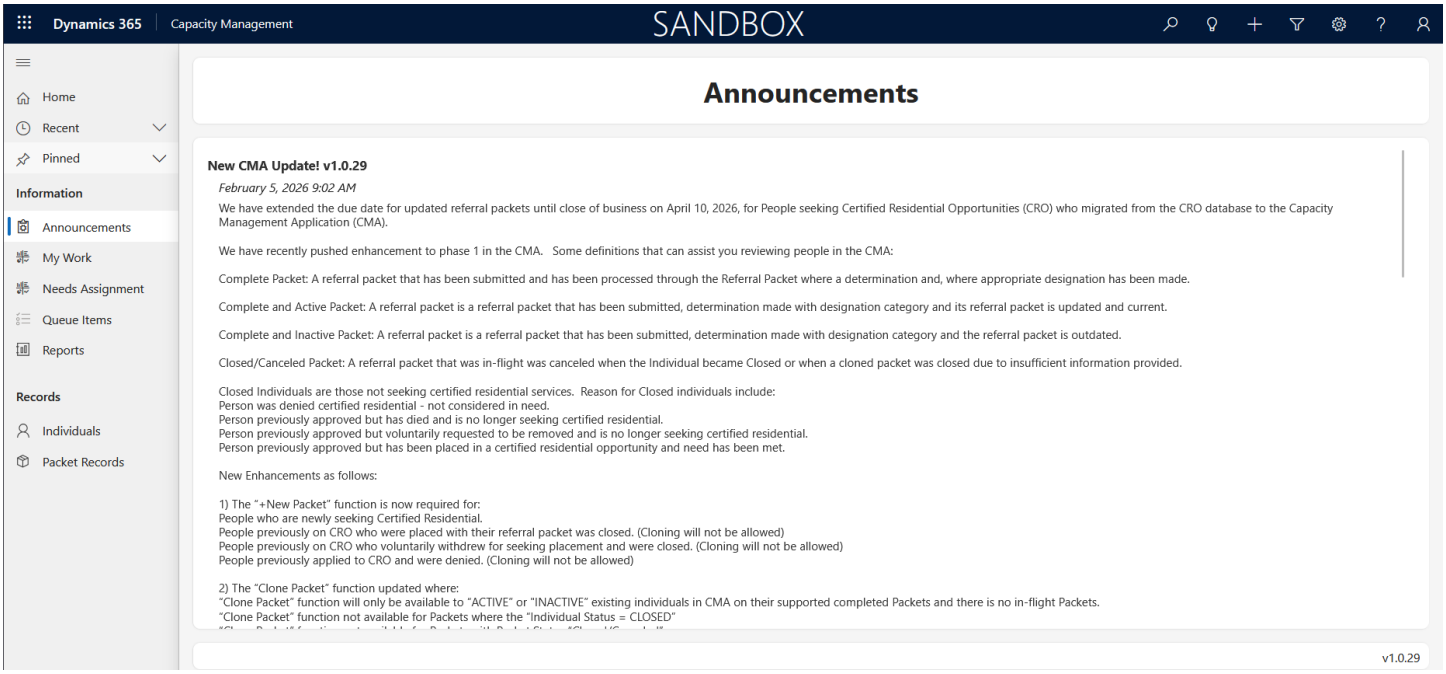




Upon successful sign in, select **Capacity Management**.



The user will be brought to the Capacity Management landing screen which defaults to the **Announcements** page.



Users will use the left-pane menu to navigate. The left-pane menu is divided into two main sections.

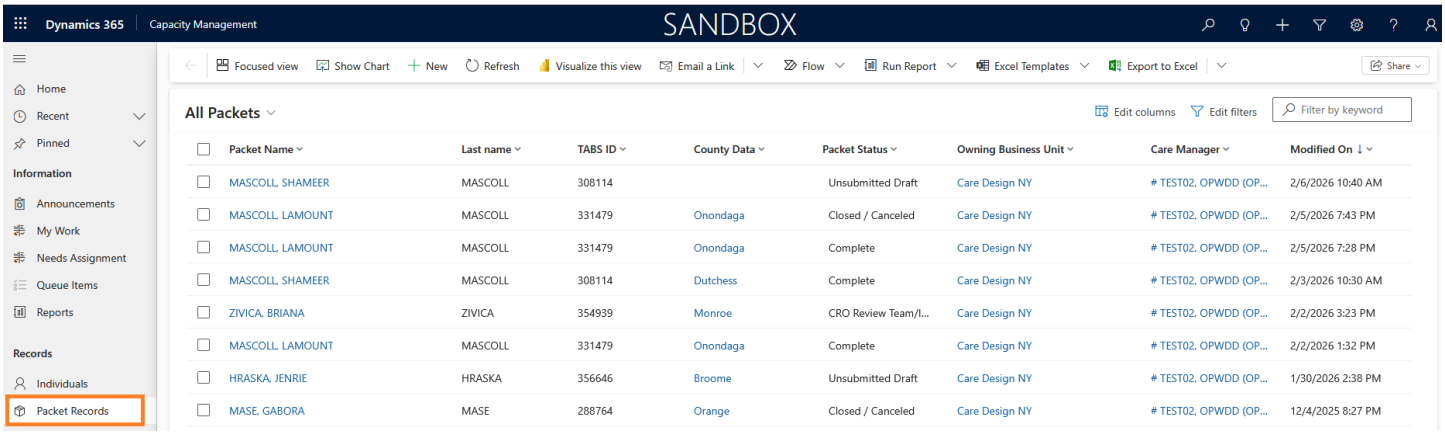
The “Information” section includes “My Work”, “Needs Assignment” and “Queue Items” where the user can navigate to the actions/tasks to be completed for a person’s packet.

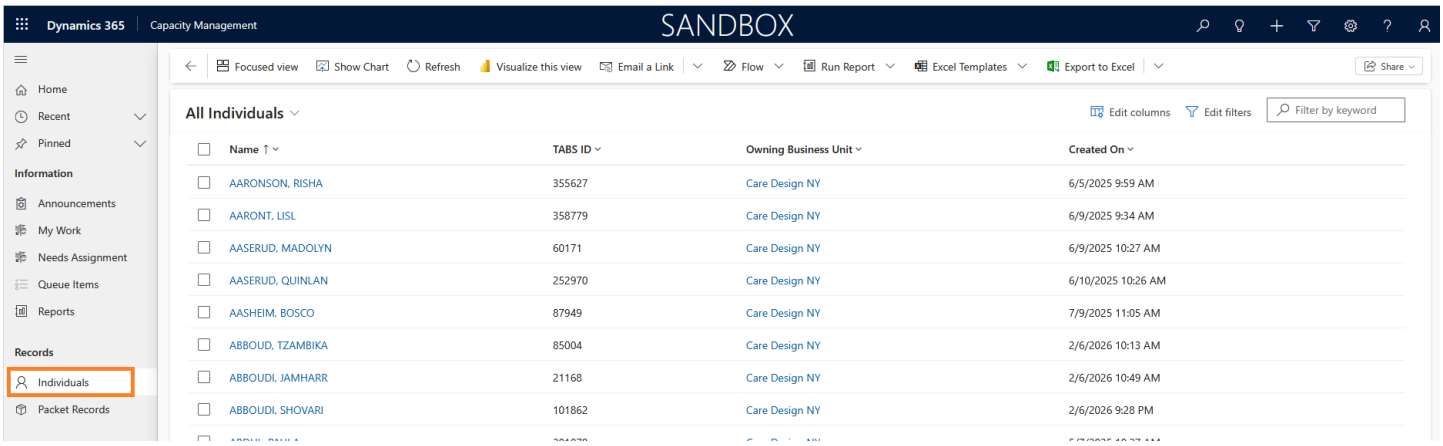
The “Records” section contains “Individuals” and “Packet Records”.

- The “Individuals” page contains the profiles for all persons in the CMA system. Users can access/update information related to the person, as well as their packets.
- The “Packet Records” page contains a list of packets.

Users will have different menu options and views depending on their role within the CMA application. Example: A CCO Care Manager would only be able to see the people their agency supports.

To select a specific person’s record, click on “Packet Record” from the menu. Scroll to find the person and click on their name. Alternatively, click on “Individuals” and find the person’s name and select their record.





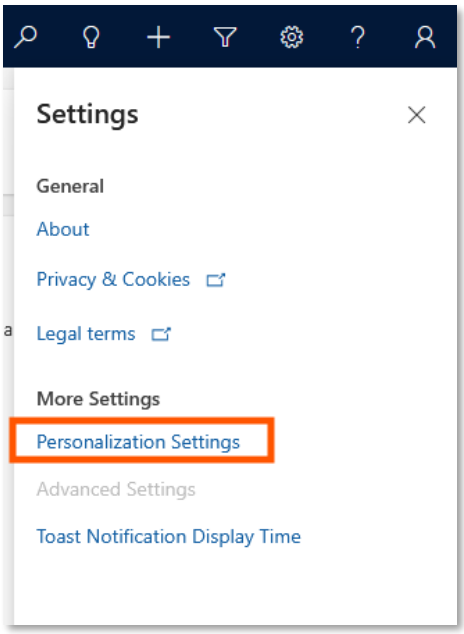
Also available in the left pane menu is “Recent”, which will take you to the last 10 pages in your history. Users may also wish to open a duplicate browser tab in order to view multiple pages of the CMA simultaneously.

View User Information

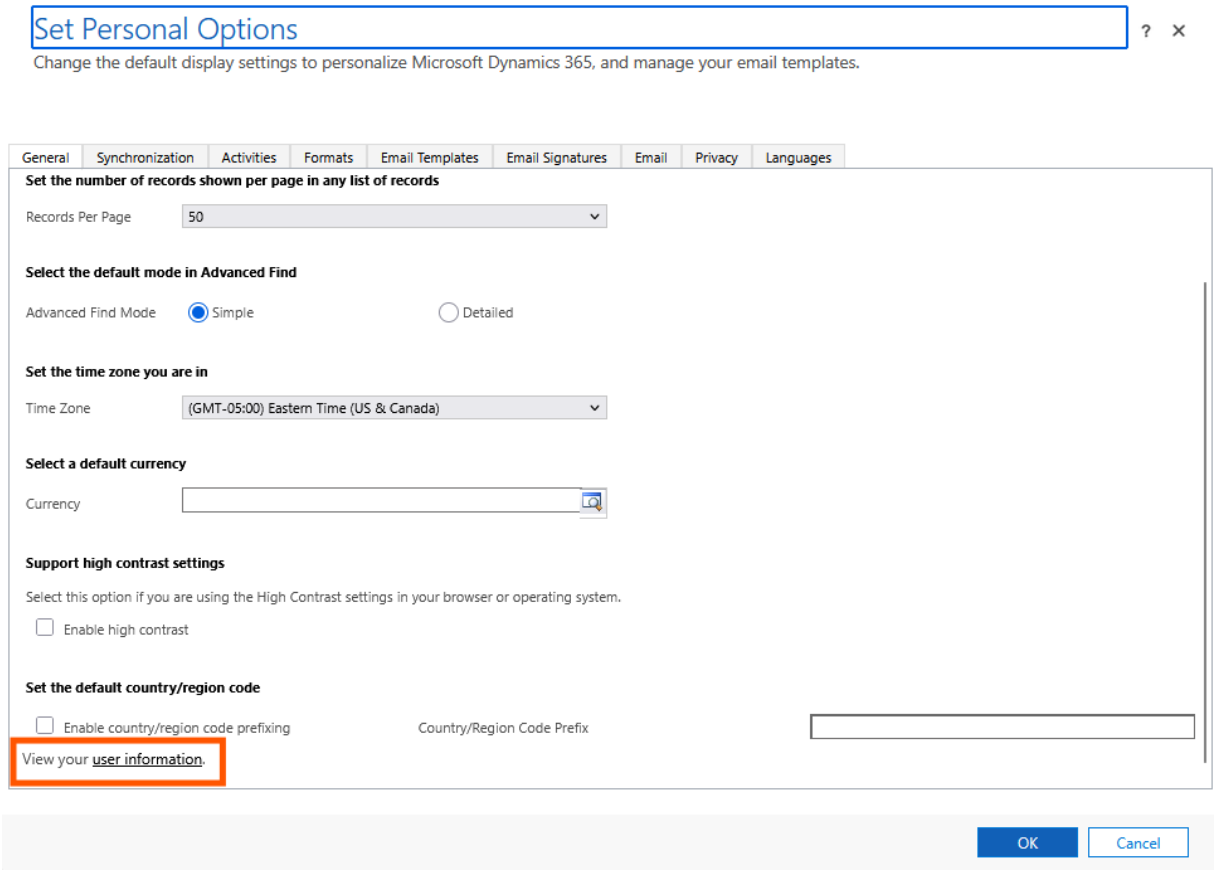
All users can find their User Information using the Settings option. User Information will contain name, email, Business Unit (BU), Teams (permission groups), and Queues.

1. Click on the Settings gear icon on the top right.

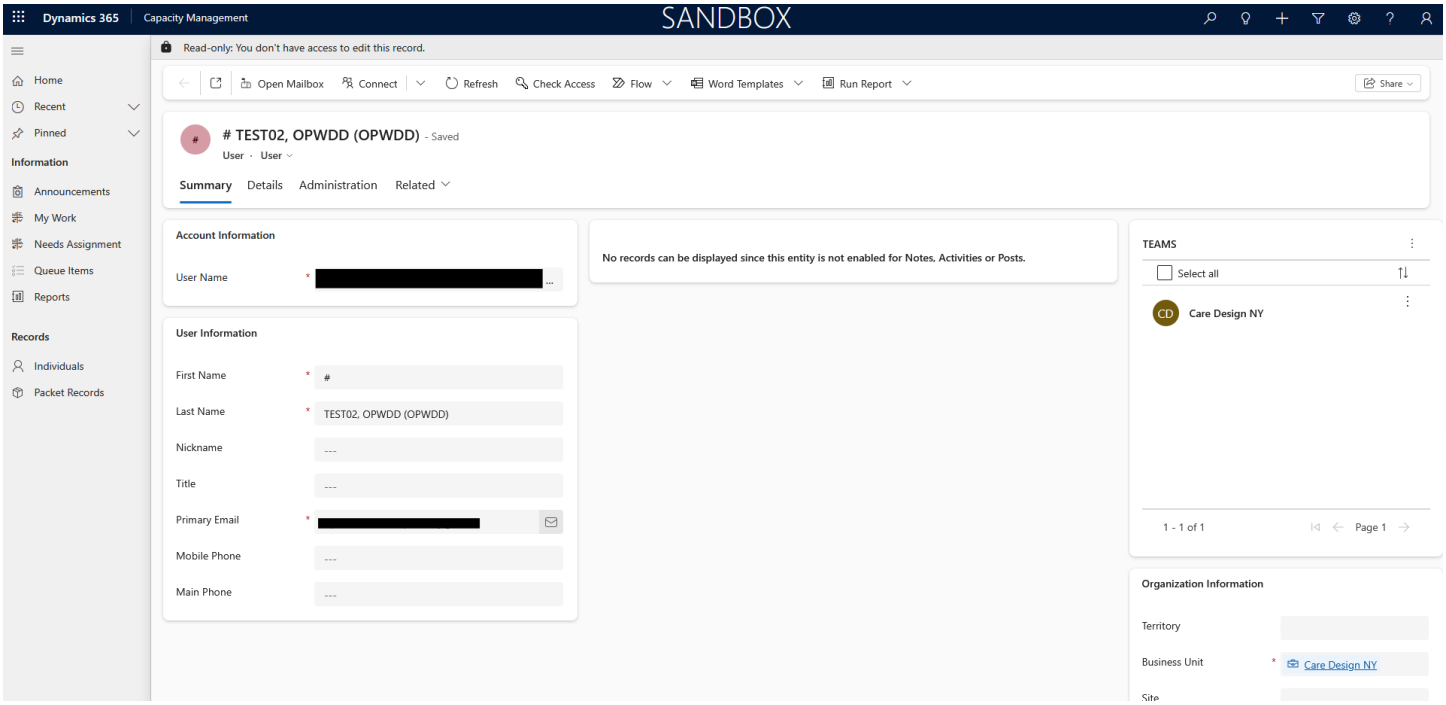
2. Click on the Settings menu's "Personalization Settings".



3. In the Set Personal Options popup, scroll down and click "user information".



4. The user is brought to the User Information page.



Team-Role: CCO-CM (Care Managers)

Care Managers are staff users from Care Coordination Organizations who perform the role and function of coordinating referrals for people seeking OPWDD housing.

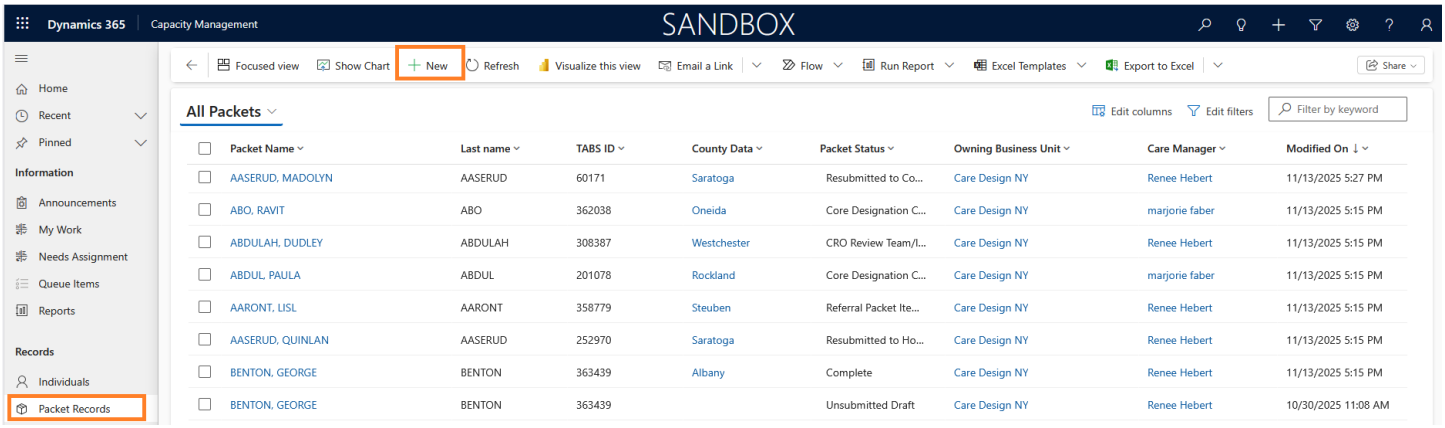
Care Managers can only view people and packets in their respective Business Unit (BU).

Getting Started – New Individuals

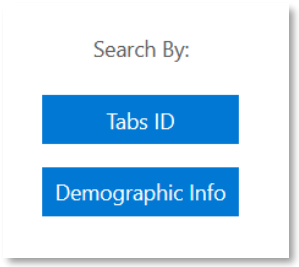
Care Managers can create packets, enter H005 forms/referrals and any requested updates, additions and addendums as requested by OPWDD. This includes uploading supporting documents for the packet.

To begin the process for new persons, navigate to “Packet Records” and click “+ New”.

Please note: The person must have a TABS ID before creating a packet.

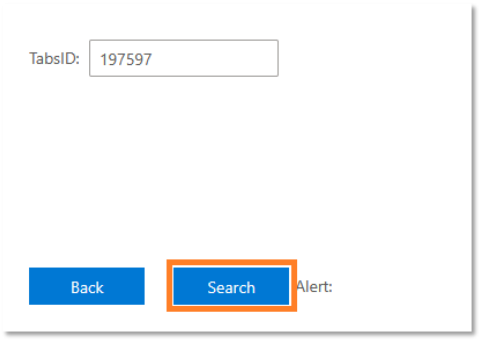


To create a new packet record, the user can search for a person by “TABS ID” or “Demographic Info”.

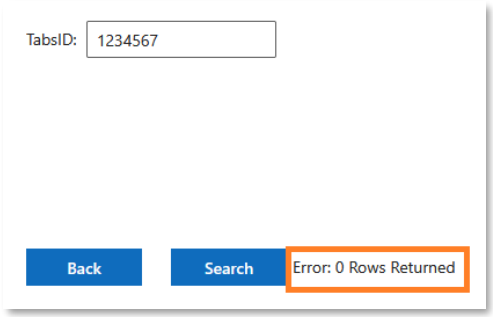


Search By TABS ID

If searching by TABS ID, the user is prompted to enter a **TabsID**. Click the **SEARCH** button.

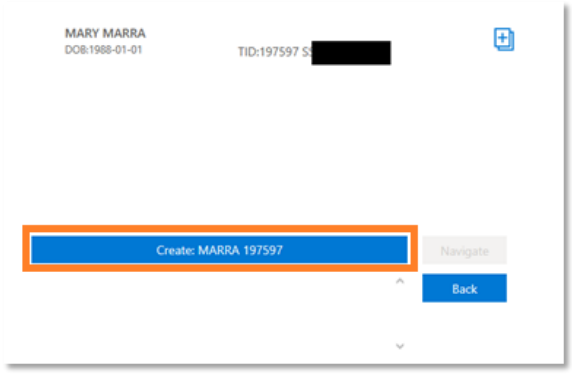


The system will return an alert/error if the person is not found.

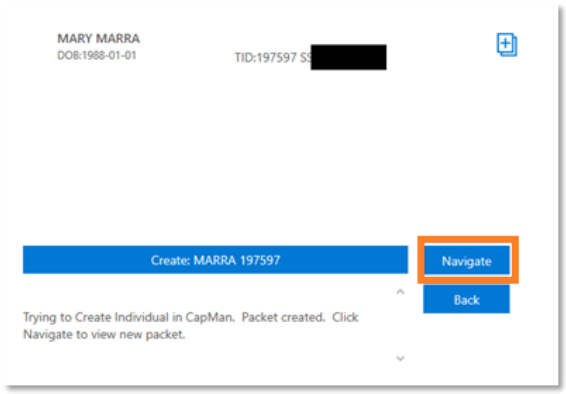


Upon entering a person's valid TABS ID, the system displays their Name, Date of Birth, TABS ID, and Social Security #.

Click "Create [Last name, TABSID]" to begin creating the application packet.

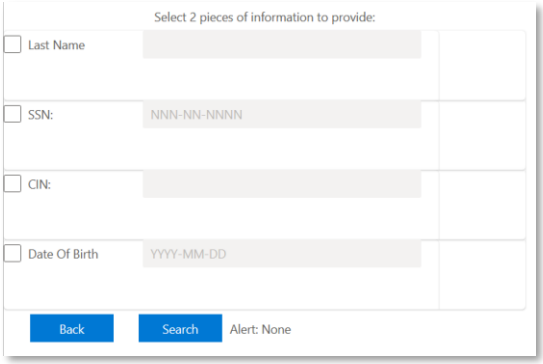


Once the system confirms creation of the packet, click "Navigate" to go to the newly created packet.

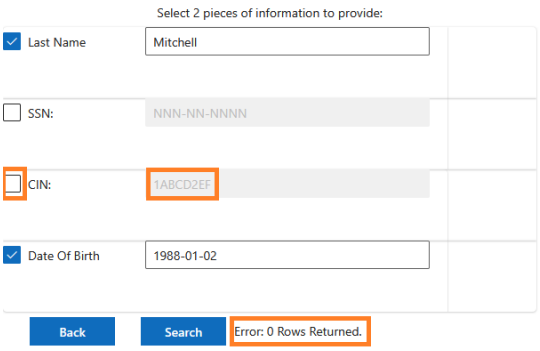


Search By Demographic Info

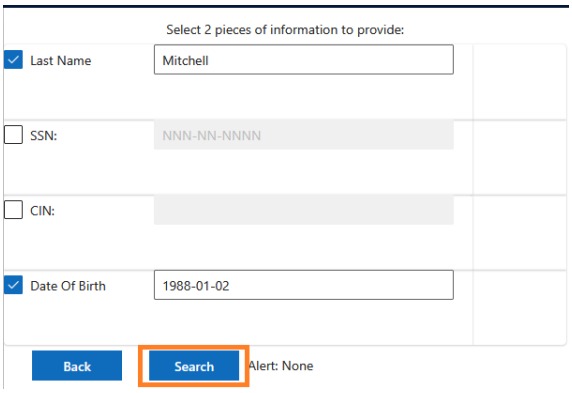
When searching by demographic Info, the user is prompted to search by at least two of the available search criteria. The user must check the checkbox and enter the search criteria field. If a specific format is required, those criteria fields have format references to follow. I.e. Date of Birth is formatted as “YYYY-MM-DD”.



The system will return an alert/error if a search fails. If the search criteria fails, the user must clear that entry AND uncheck the box to attempt another search. Searching again with the failed criteria uncleared will return a failed search again. The below displays an attempt made using an incorrect CIN, which was unchecked but not cleared; thus, searching again still did not return a result.



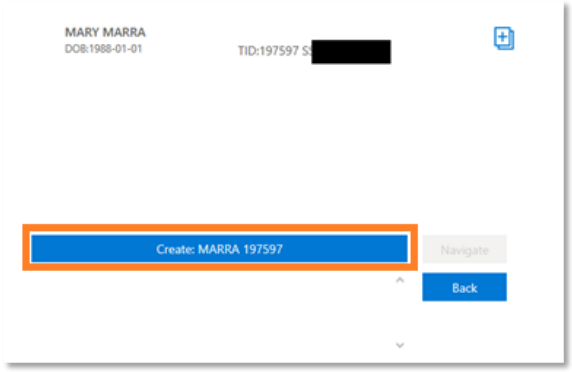
Enter valid criteria and click “Search”.



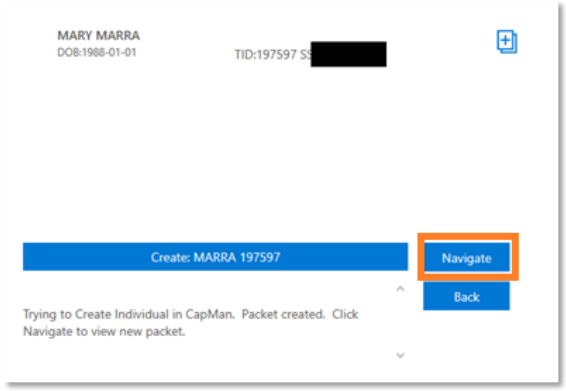
Searching by Demographic Info *may* yield multiple results. Click the "**+**" icon to display all persons matching entered criteria.

Upon entering a valid person's information, the system will display the Name, Date of Birth, TABS ID, and Social Security #.

Click "Create [Last name, TABSID]".



Click "**Navigate**" to create the packet.

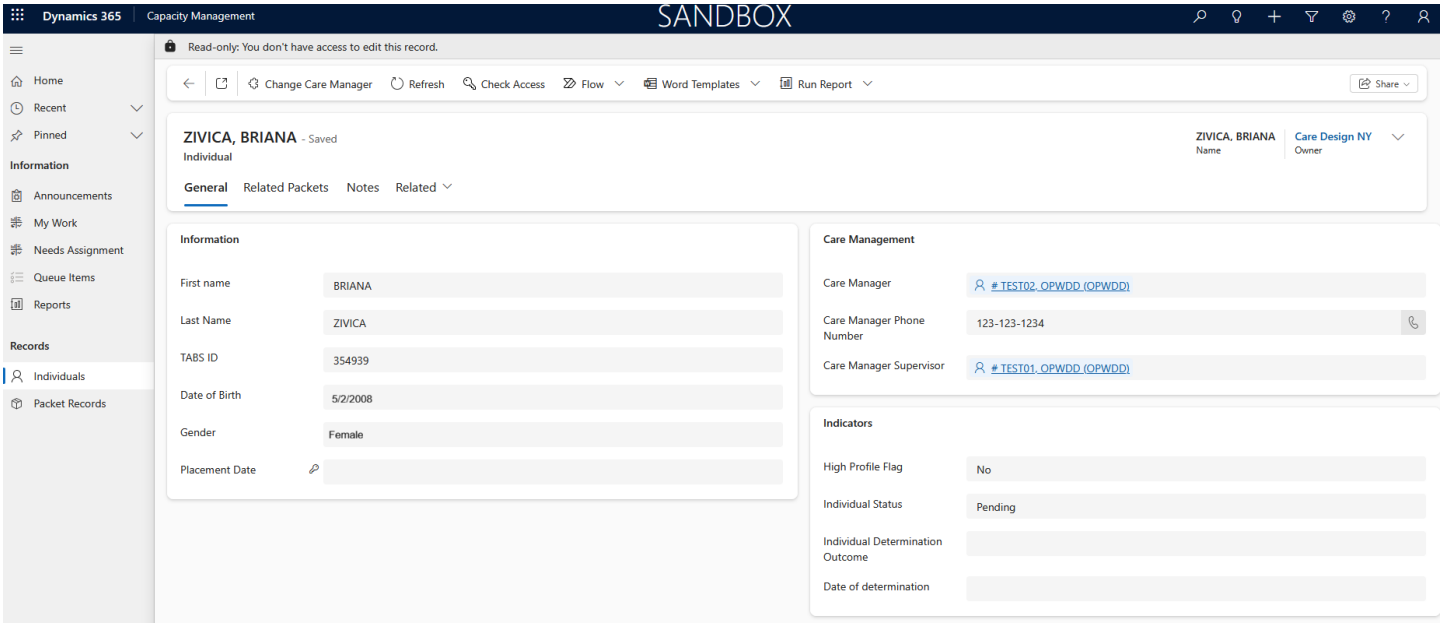


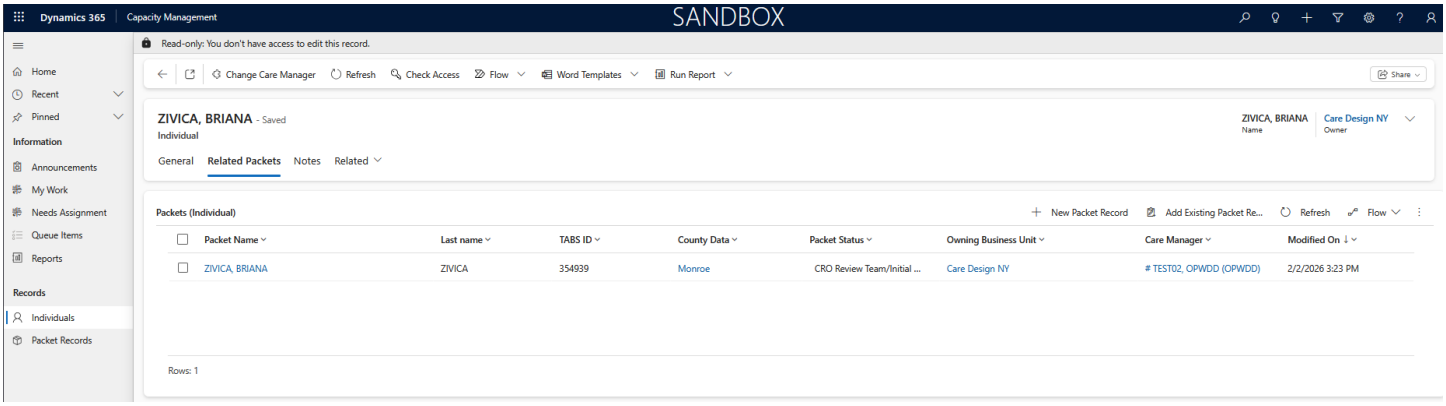
Additional Error Checks/Rules for New Packets

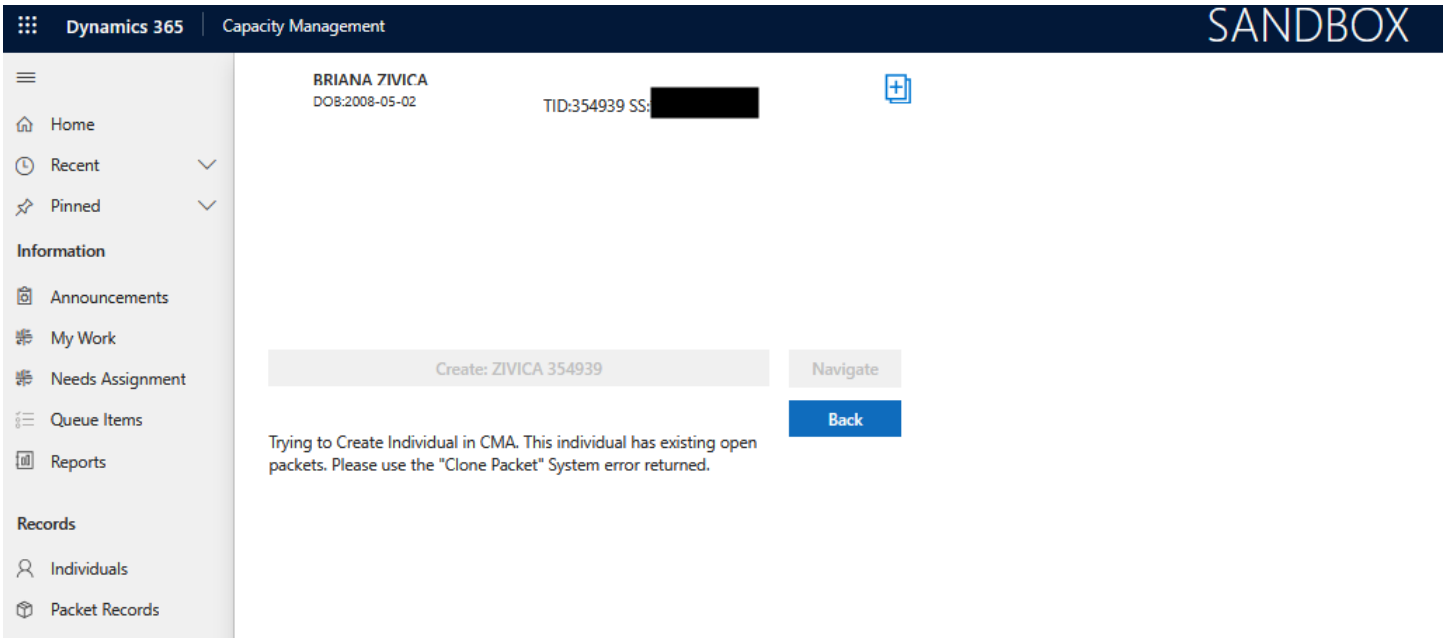
In addition to the rules for TABS ID lookup (check for valid TABS ID) or Demographic Info lookup (valid criteria), the system will also check against the following factors below to prevent the creation of a new packet.

1. Does the person already have an in-flight packet?

Below illustrates a TEST person who already has an in-flight packet. The system will prevent new packet creation and will display an error message stating that there is already an existing open packet. (3rd screen shot)

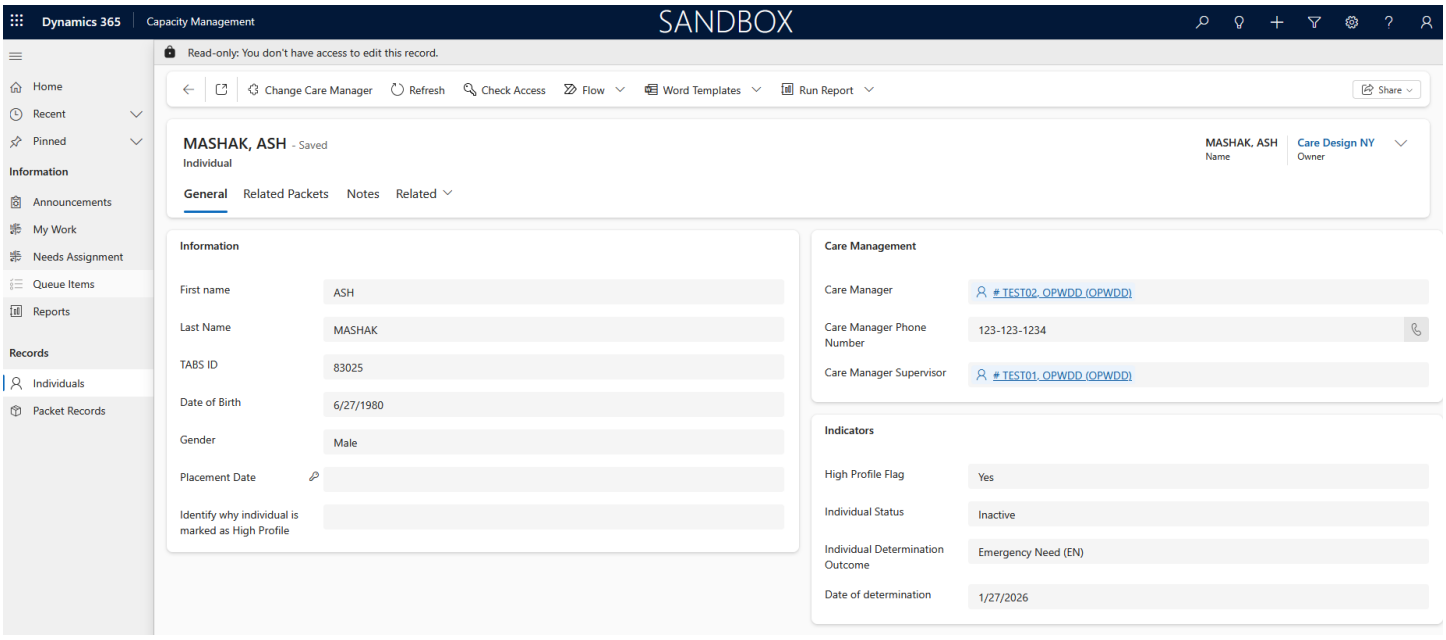


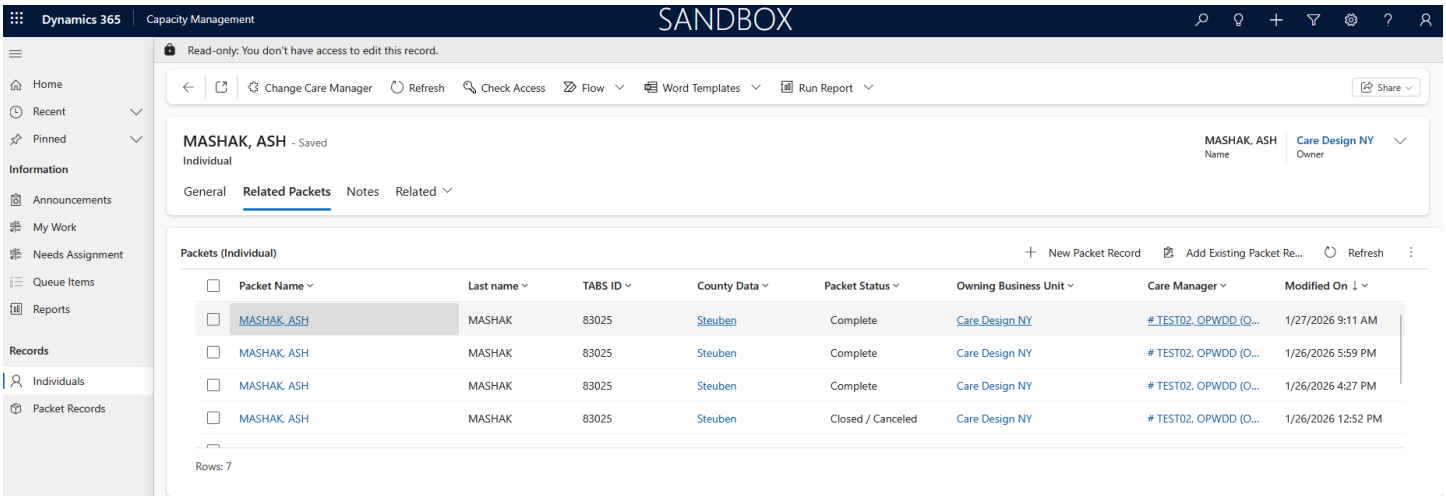


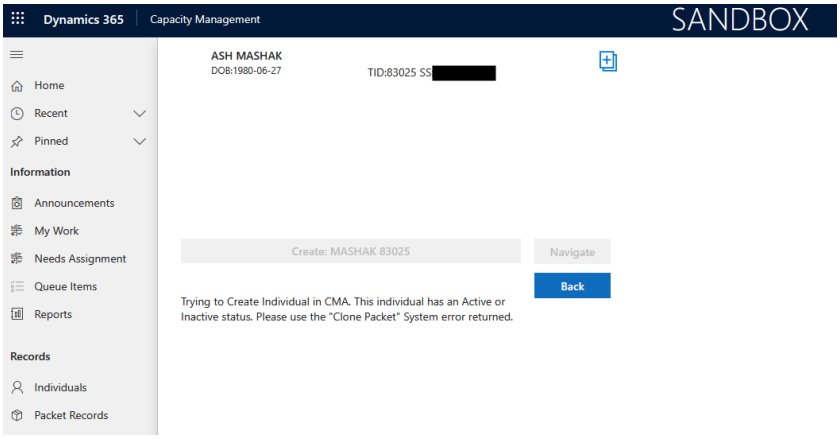


2. Does the individual already exist in CMA with the Individual Status ACTIVE or INACTIVE?

If a person has an Individual status of ACTIVE or INACTIVE, indicating they have a previously completed packet with a determination and designation, the system will prevent a new packet from being created. User will need to use the “Clone Packet” to create a new packet.

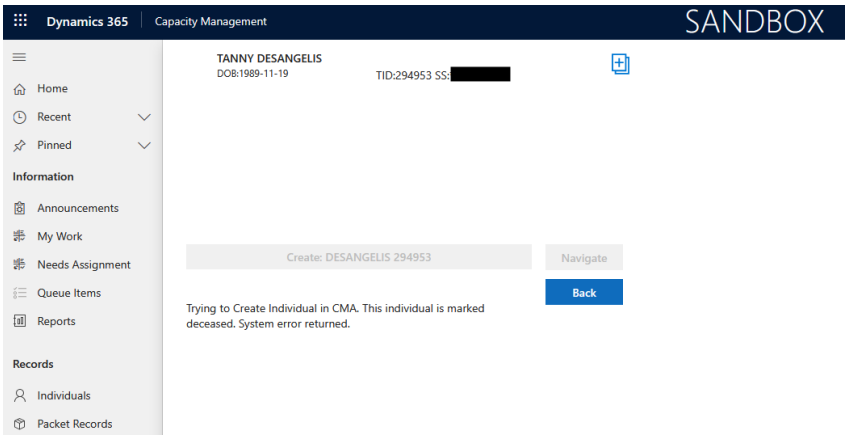






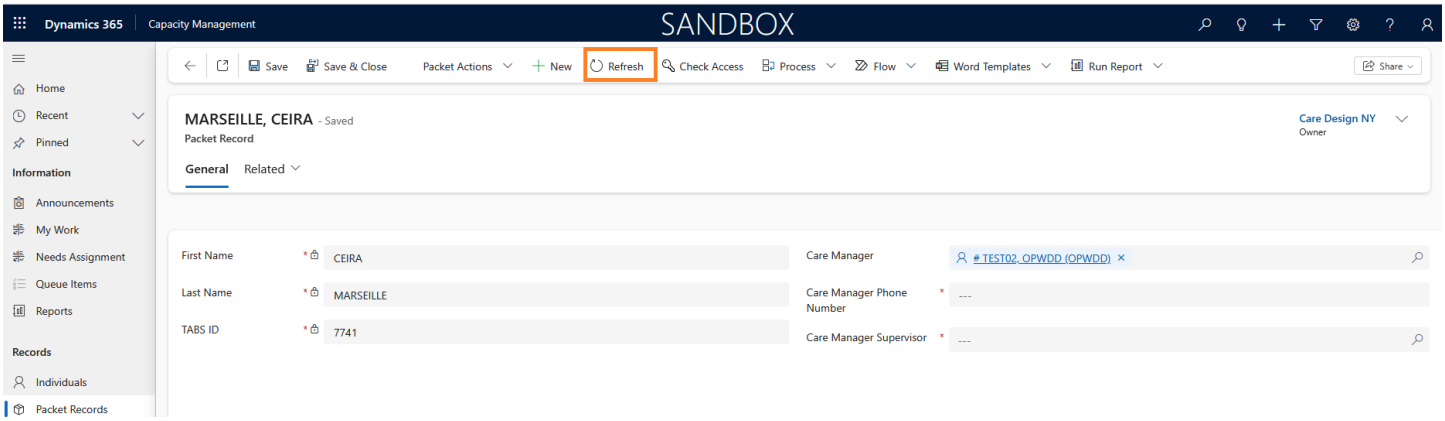
3. Is the individual deceased? (“Individual Status = CLOSED” with “Reason = Death” on file)

The system will check if the individual is deceased. If so, any attempt to create a new packet will be prevented. Clone Packet will not be available for a deceased person.



Newly Created Packet

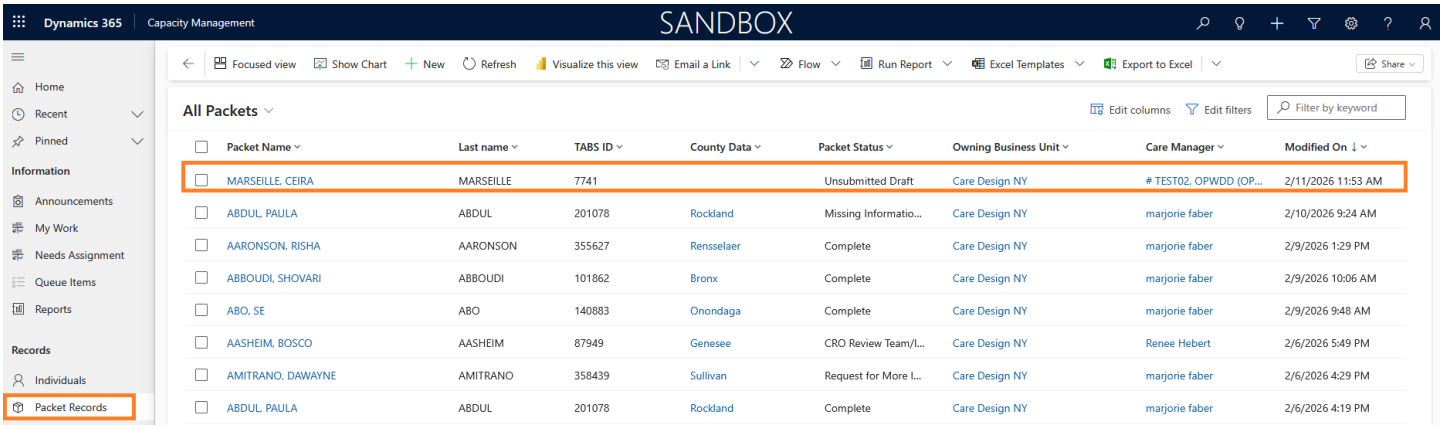
Once in the newly created packet record, the user may continue working on the packet contents or can exit and revisit the packet later. If the page does not load, clicking the “Refresh” button on the toolbar will force the packet to load correctly. Once the packet is created, it is automatically saved. You will see “saved” next to the person’s name.



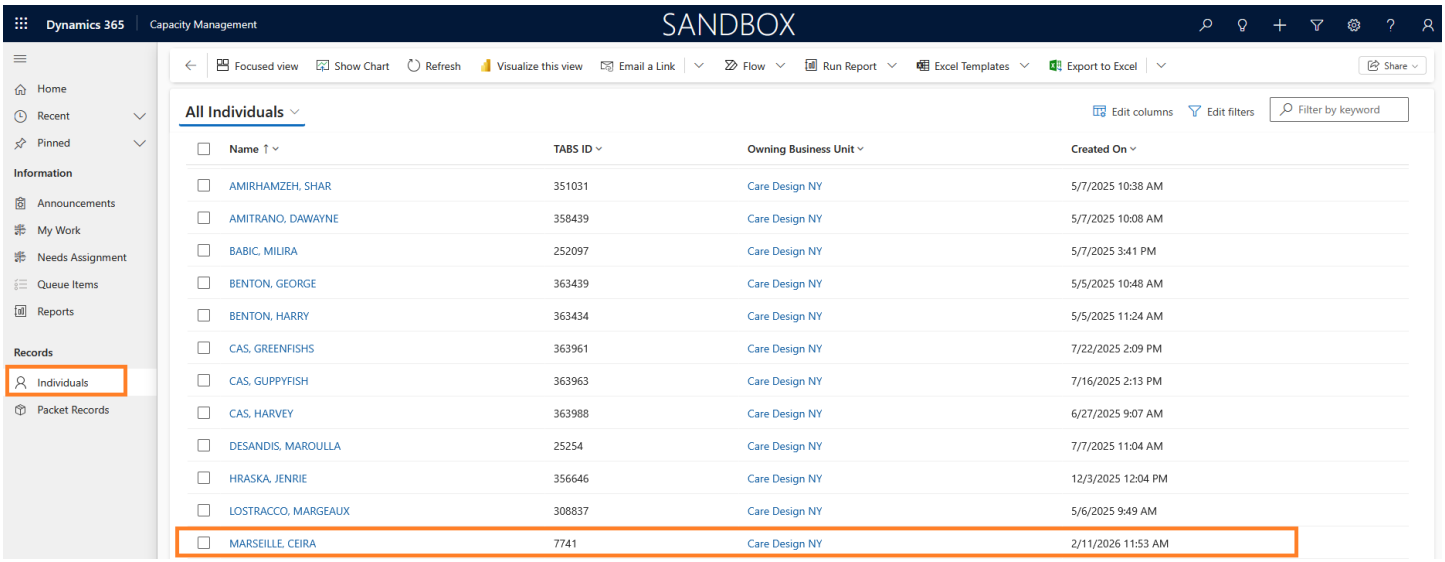
Individual’s Packet(s)

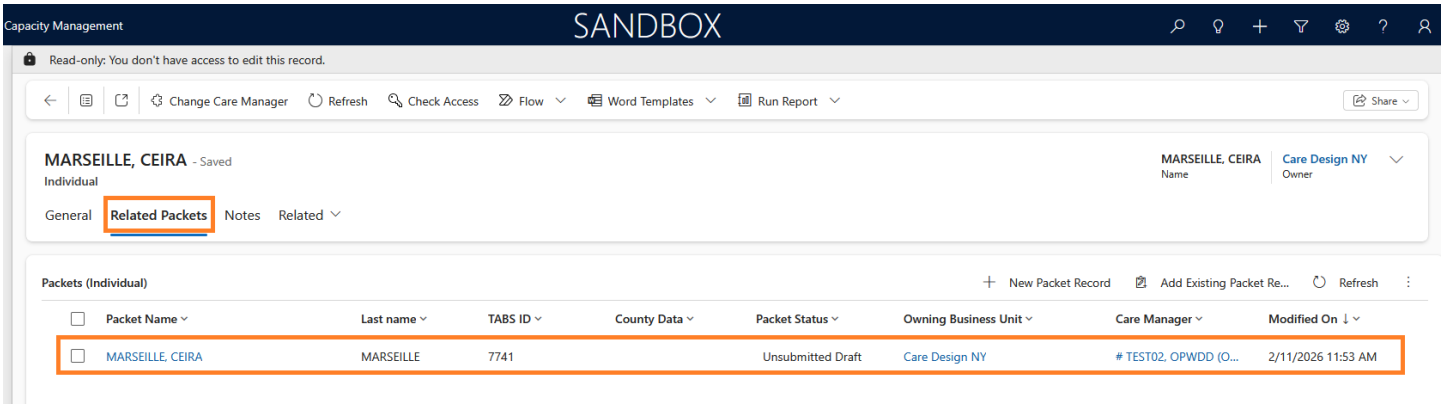
Navigating to Individual’s Packet(s)

Click the “Packet Records” group menu on the left-pane menu. Navigate to the desired record and click on person’s name. Users will have the ability to find packets by manually scrolling or through the search bar on the top right.

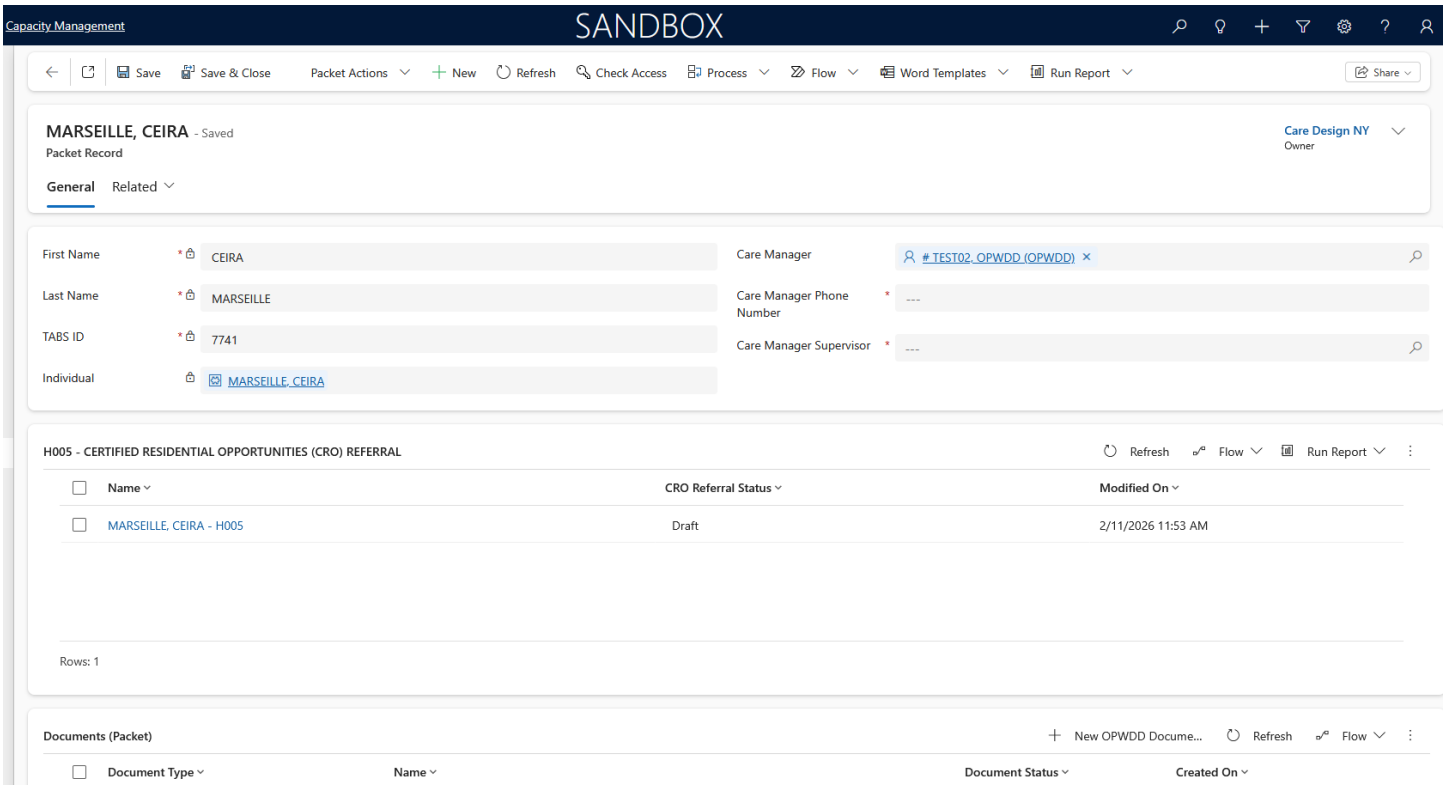


Alternatively, users can revisit packets by using the “Individuals” menu option on the left-pane menu. Navigate to the person by manually scrolling or by using the search bar on the top right. Click on the person, select the “Related Packets” tab and click on the packet.



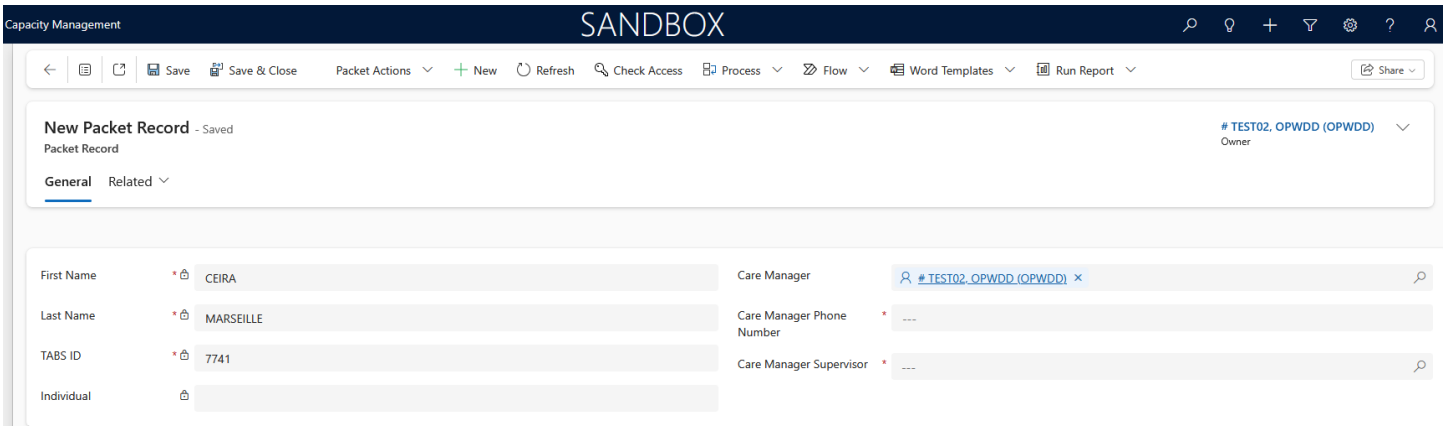


When in a packet, the header displays the packet name and the packet record creator or “owner”. The packet has sections made up of: General packet information, H005 CRO Referral, and Documents (Packet).

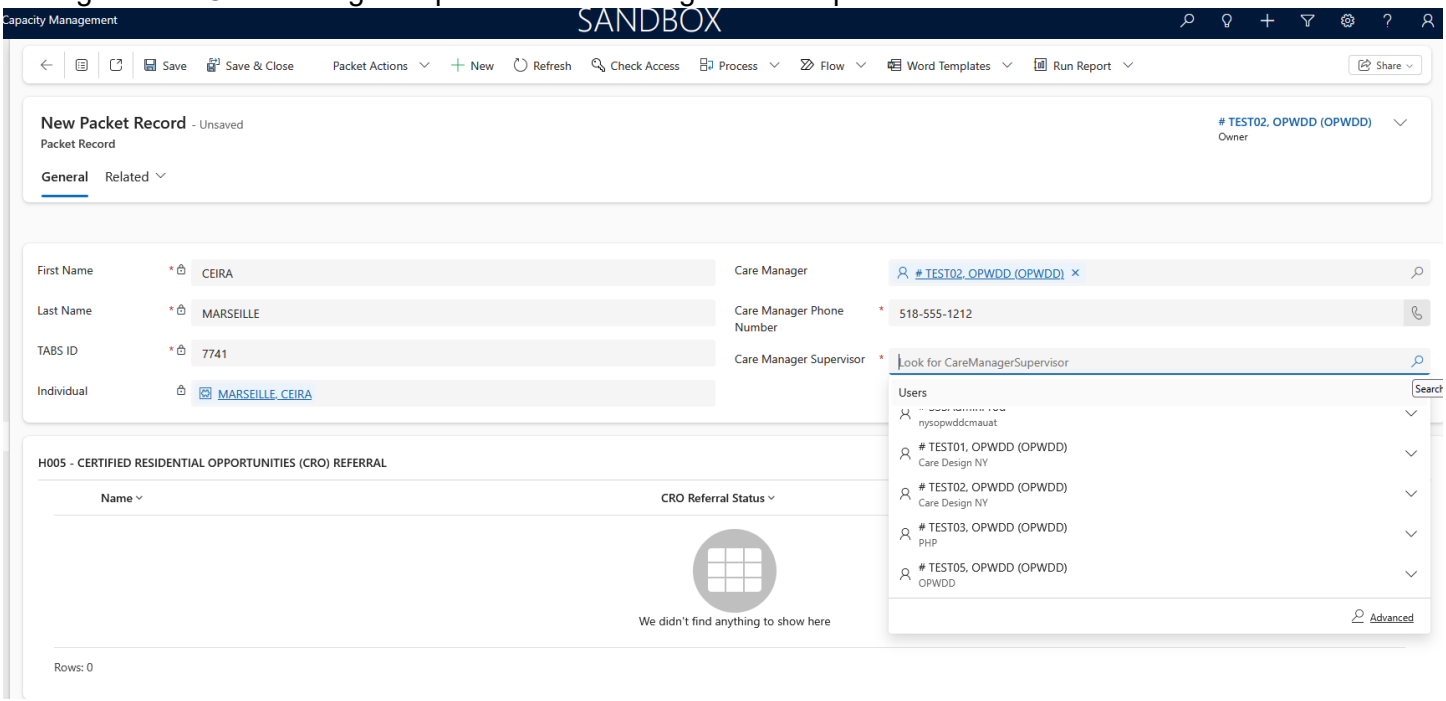


Packet - General Information

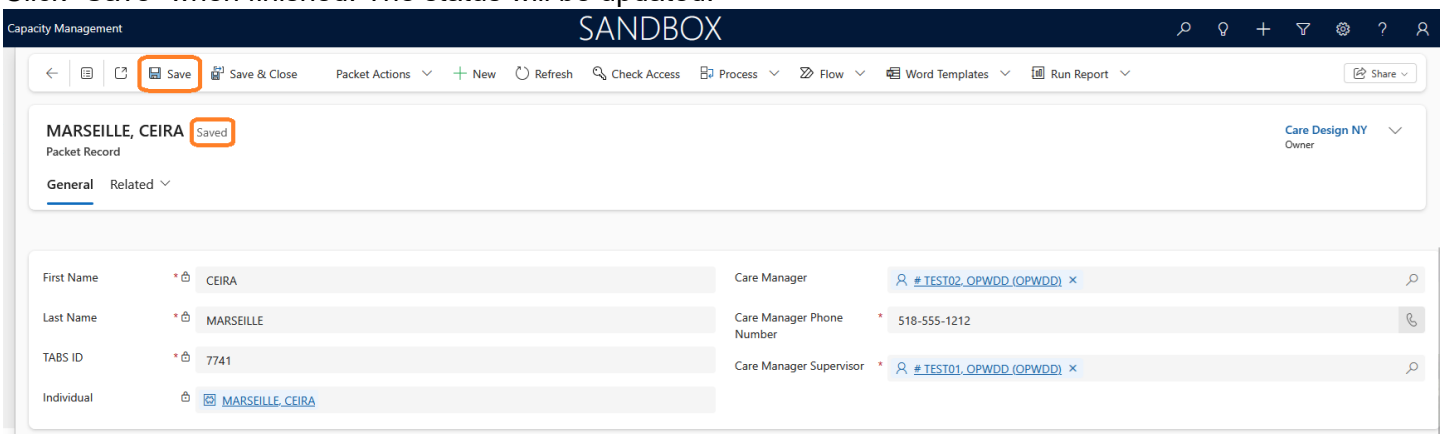
The person's basic information and Care Manager is displayed as well as the owner of the packet.



The Care Manager must enter their “Phone Number” and “Supervisor”. The system will prevent the “Care Manager” and “Care Manager Supervisor” from being the same person.



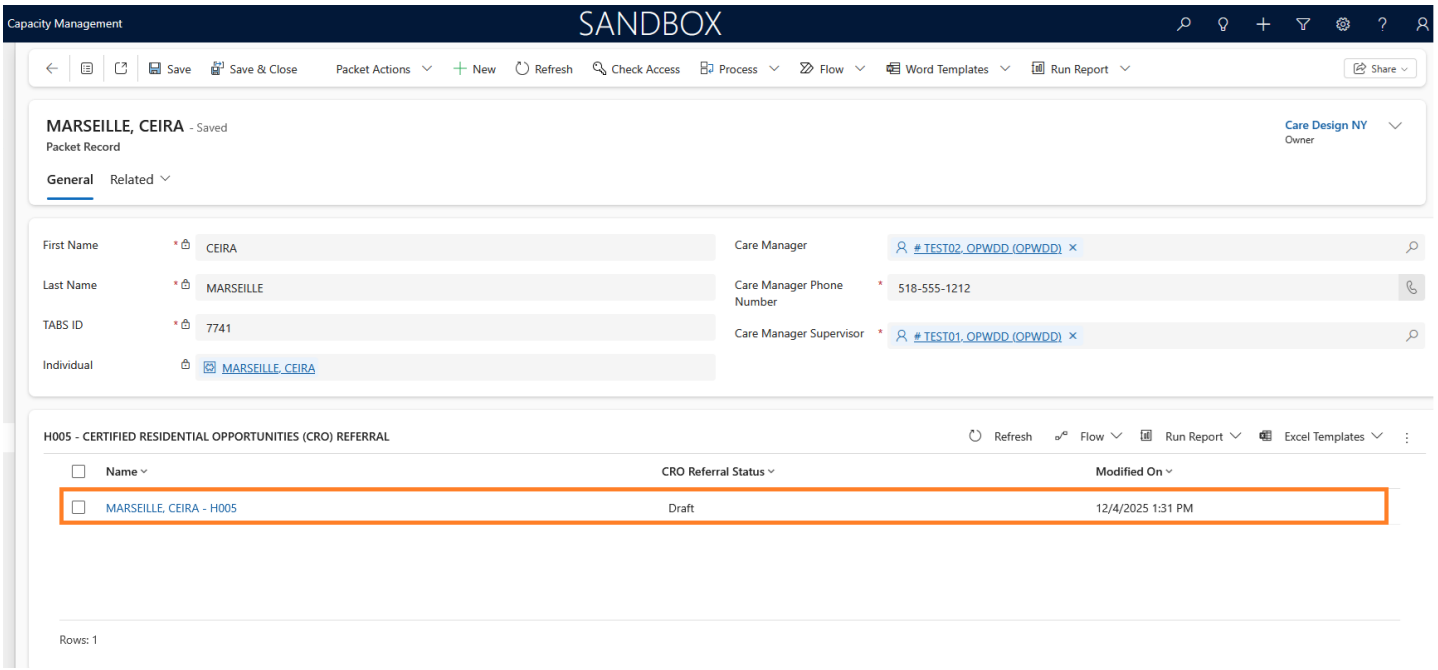
Click “Save” when finished. The status will be updated.



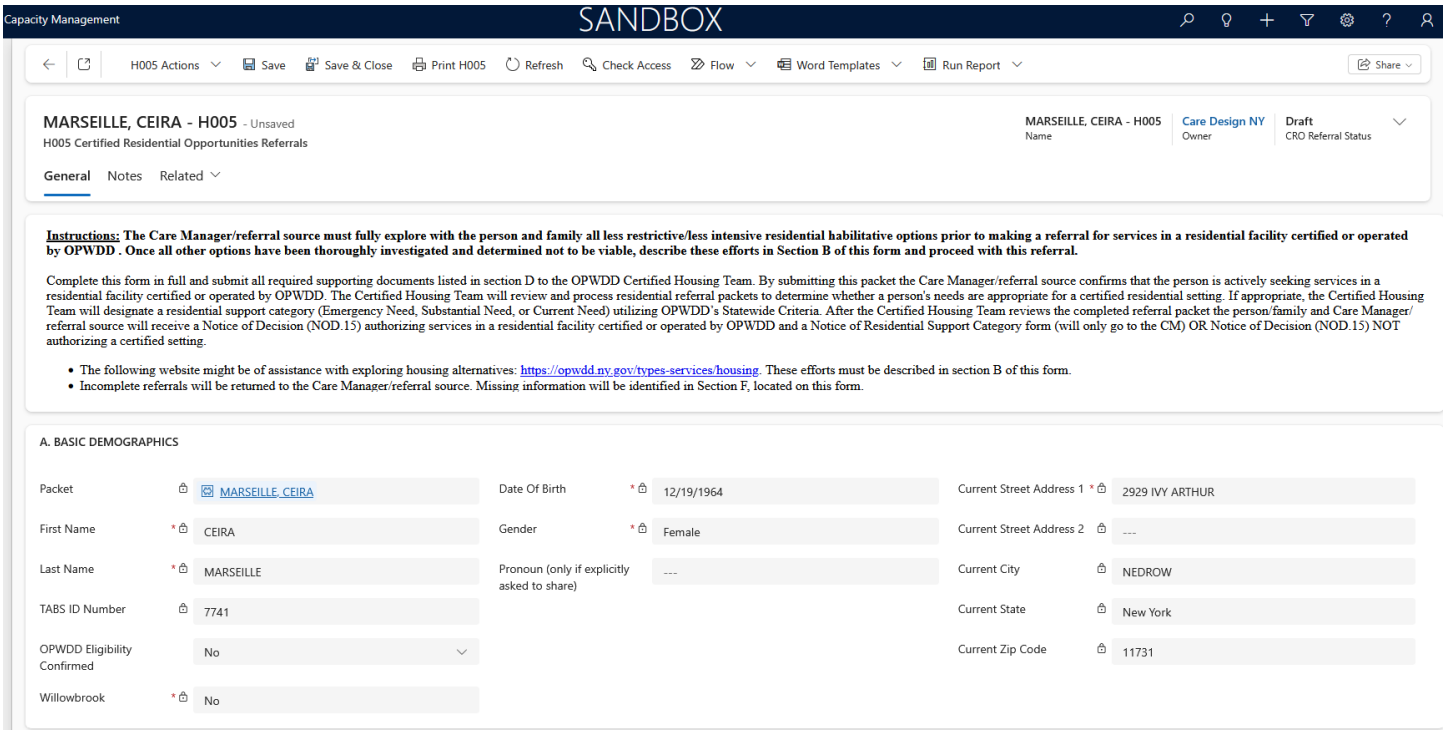
H005 CRO Referral

The H005 CRO Referral section is the dedicated function where the user performs data entry for the person’s H005 Referral. There is always one active H005 Referral when the packet is created. Any information that is auto-populated in the H005 is pulled from Choices. If the address is incorrect, a DDP1 demographic change will need to be submitted in Choices. If the incorrect address persists after the DDP1 is processed, a help ticket will need to be submitted with ITS.

To begin, the user must already be in a person’s packet. Click on the “[*Person’s Name*] - H005” file.

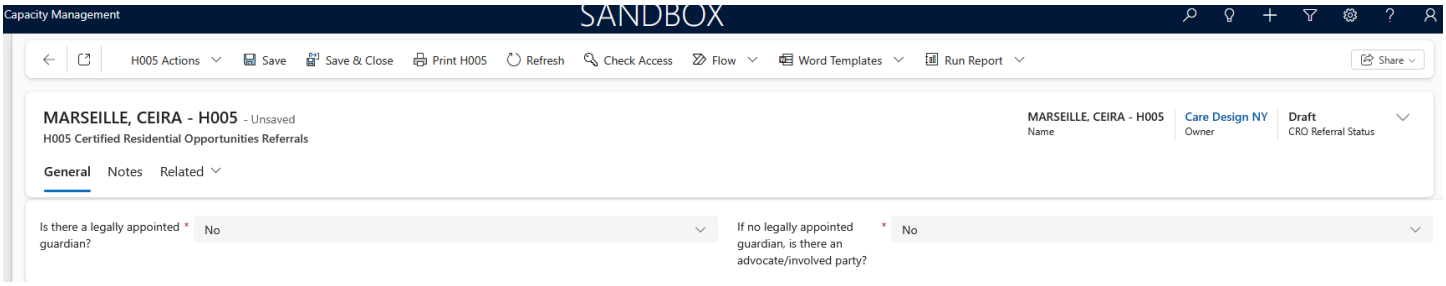


The user will be brought to the draft H005 Referral and can begin data entry. The beginning of the referral provides instructions for the users to follow. **All required fields are indicated with a red asterisk** (*).
As the user is completing the H005 Referral Form, the save status is indicated at the top left of the screen, to the right of the person's name – H005. When first entering the H005 Form, the save status will be "unsaved". Once fields have been entered, whether the H005 CRO Referral Form is filled partially or completely, the user will need to click on the H005 Actions tab in the top left tool bar menu and select "Partial Save" from the drop down. The default **"Save" or "Save & Close" toolbar buttons will NOT save when the H005 is not fully filled, instead this will perform an error check**. If the user forgets to partially save their work prior to exiting out of the H005 Referral Form, data entry will be lost when exiting out of the form.

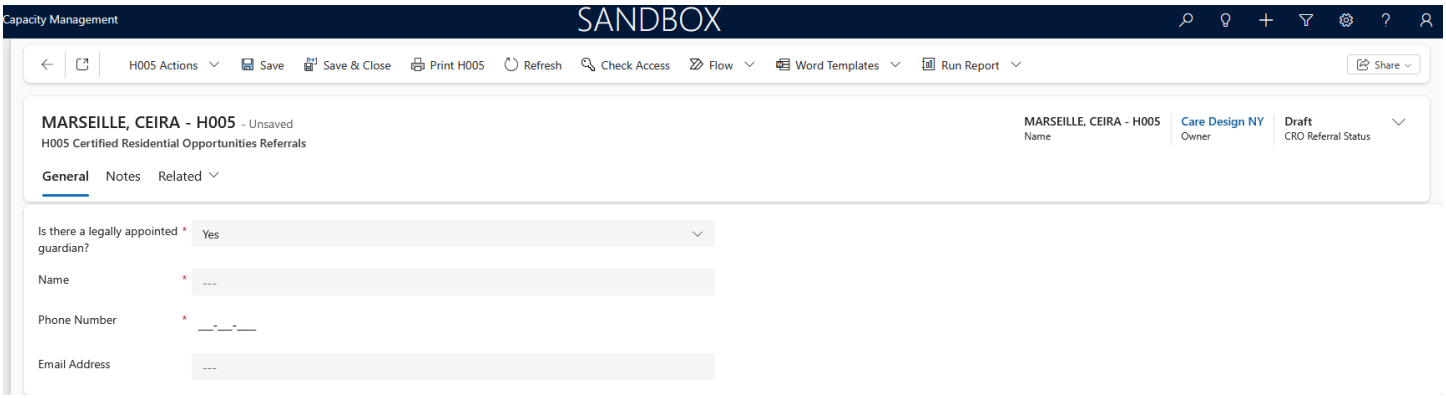


For the screenshots below, depending on what the user selects for the fields for Legal Guardianship, the subsequent fields will change.

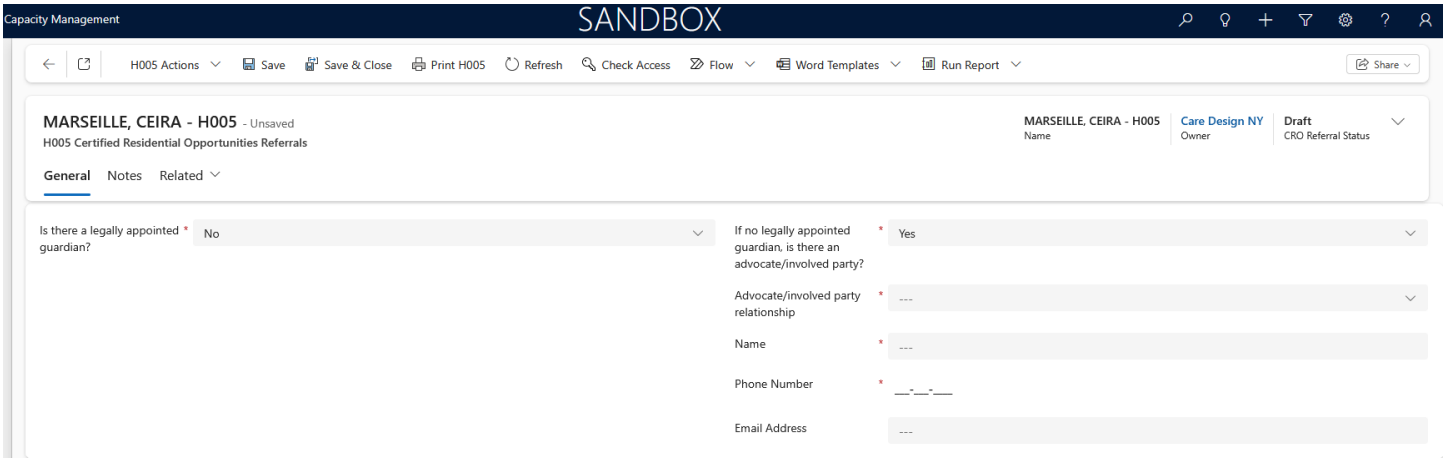
If they are “No” for the first two required fields, nothing changes. This is the default.



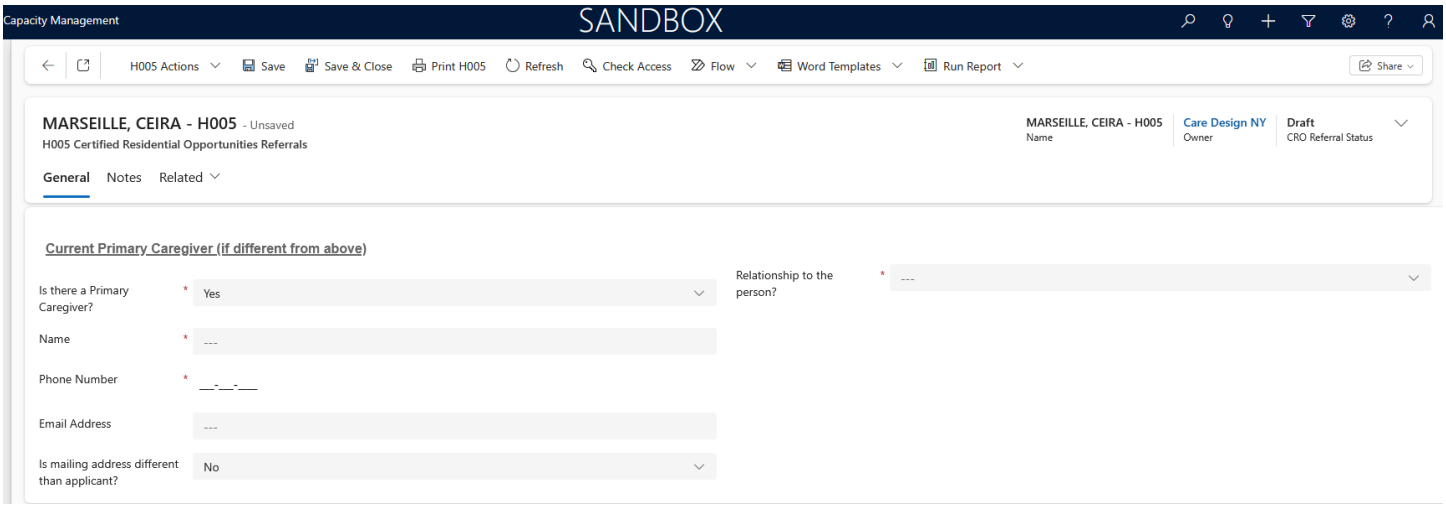
If “Yes” is selected for the “Is there a legally appointed guardian?”, the “If no legally appointed guardian, is there an advocate/involved party?” field will disappear and additional fields will appear under “Is there a legally appointed guardian?”

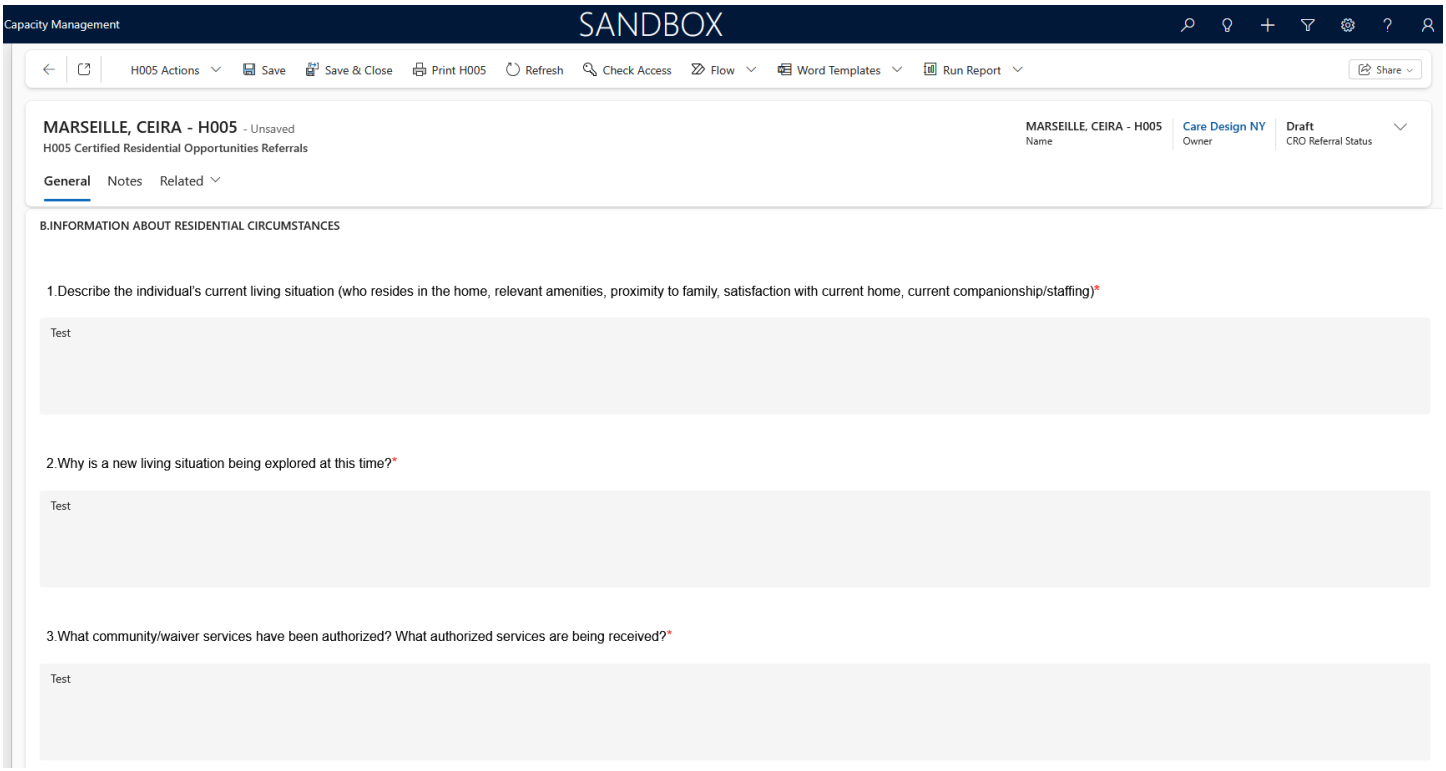


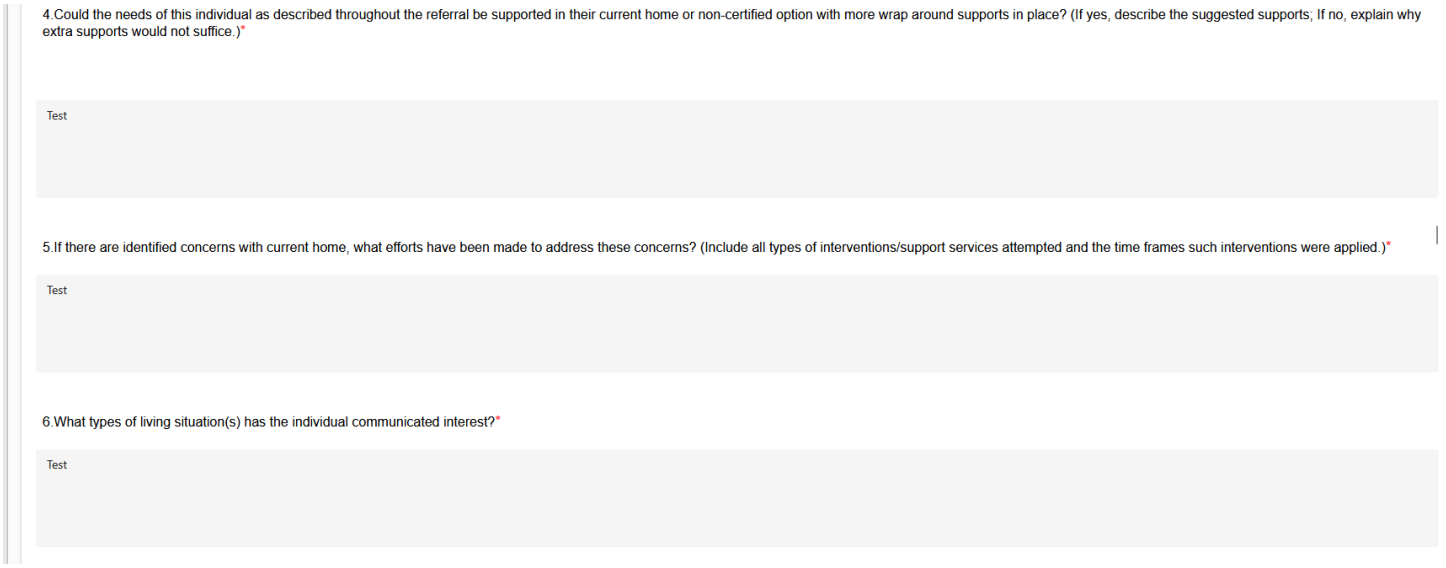
If the user selects “No” for “Is there a legally appointed guardian?” and “Yes” for “If no legally appointed guardian, is there an advocate/involved party?”, additional fields will appear under the “If no legally appointed guardian, is there an advocate/involved party?” field.



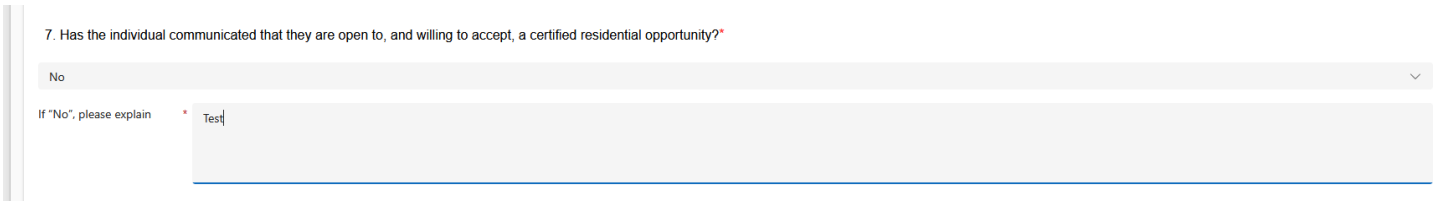
If the user selects “Yes” for “Is there a Primary Caregiver?”, the Name, Phone Number and Relationship to Person is required.

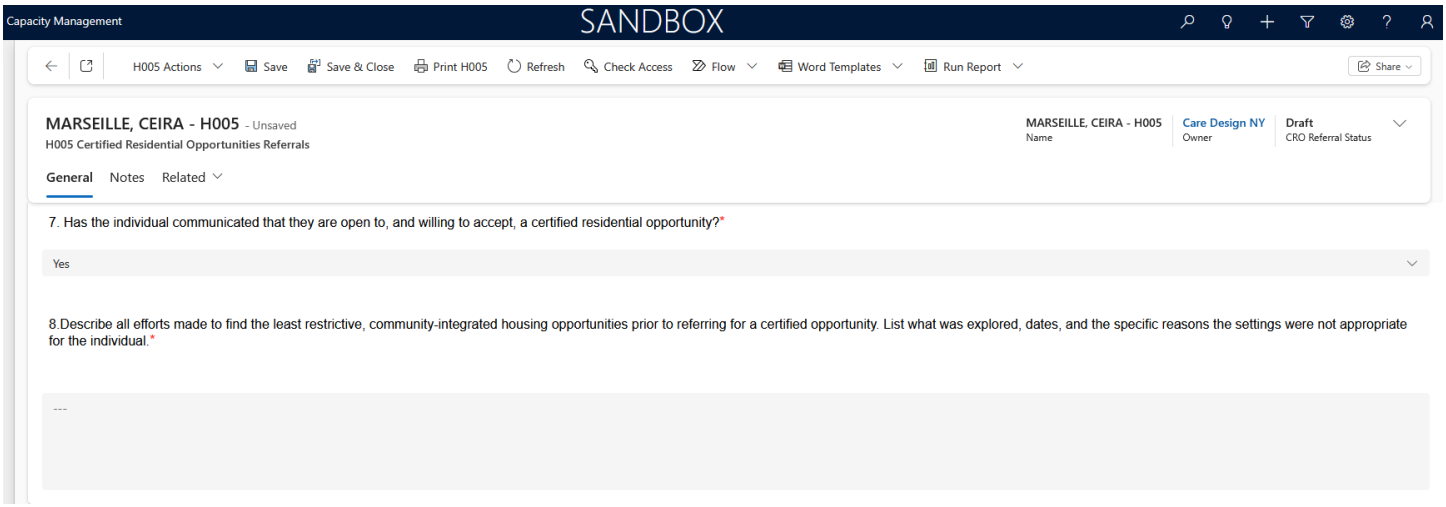

Capacity Management
SANDBOX
H005 Actions
Save
Save & Close
Print H005
Refresh
Check Access
Flow
Word Templates
Run Report
Share
MARSEILLE, CEIRA - H005 - Unsaved
H005 Certified Residential Opportunities Referrals
MARSEILLE, CEIRA - H005
Name
Care Design NY
Owner
Draft
CRO Referral Status
General
Notes
Related
Current Primary Caregiver (if different from above)
Is there a Primary Caregiver?
Yes
Relationship to the person?
Name
Phone Number
__-__-____
Email Address
Is mailing address different than applicant?
No


Capacity Management
SANDBOX
H005 Actions
Save
Save & Close
Print H005
Refresh
Check Access
Flow
Word Templates
Run Report
Share
MARSEILLE, CEIRA - H005 - Unsaved
H005 Certified Residential Opportunities Referrals
MARSEILLE, CEIRA - H005
Name
Care Design NY
Owner
Draft
CRO Referral Status
General
Notes
Related
B.INFORMATION ABOUT RESIDENTIAL CIRCUMSTANCES
1.Describe the individual's current living situation (who resides in the home, relevant amenities, proximity to family, satisfaction with current home, current companionship/staffing)*
Test
2.Why is a new living situation being explored at this time?*
Test
3.What community/waiver services have been authorized? What authorized services are being received?*
Test

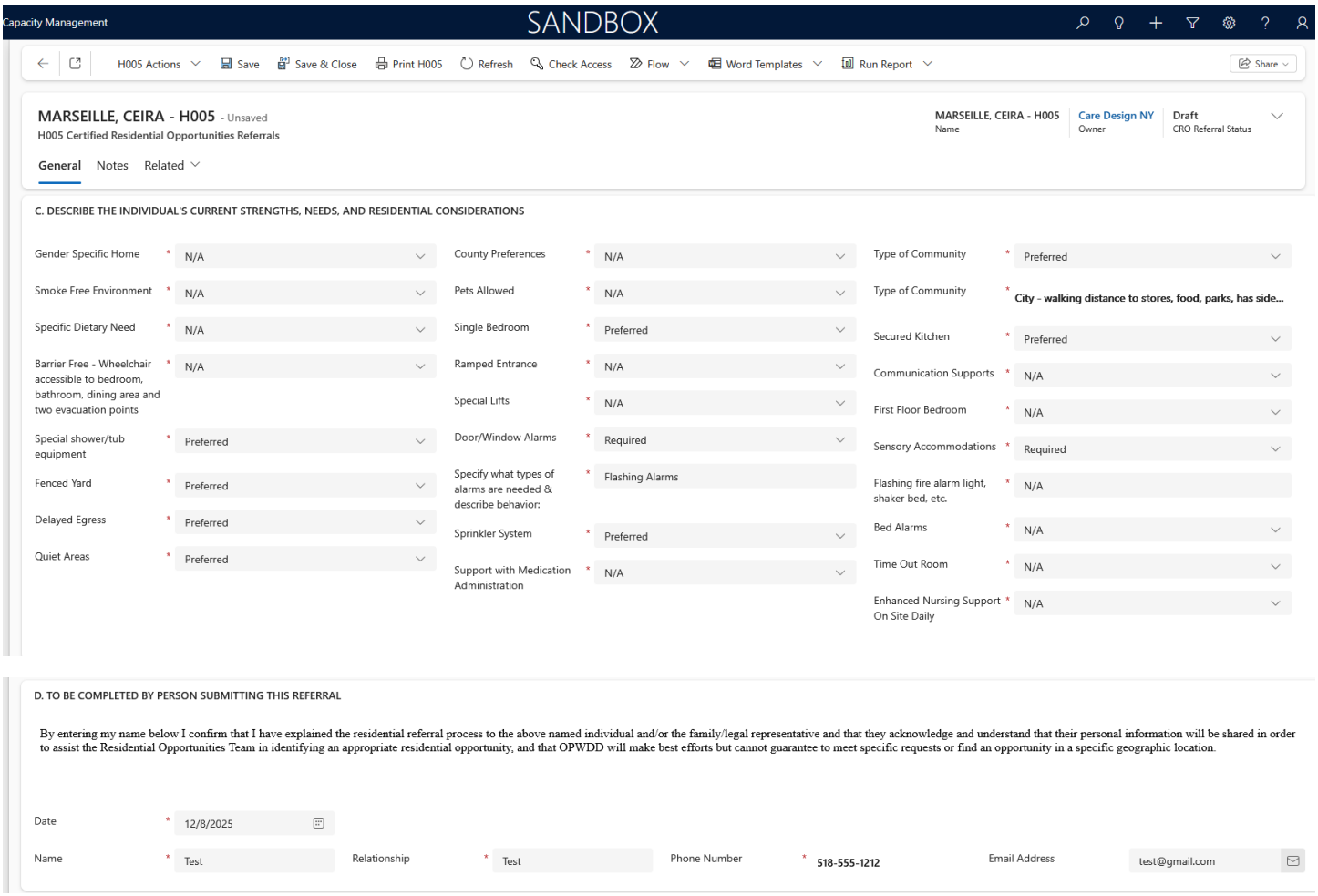


For question #7, if the user selects “No”, an additional text box will pop-up requiring the user to explain their answer.



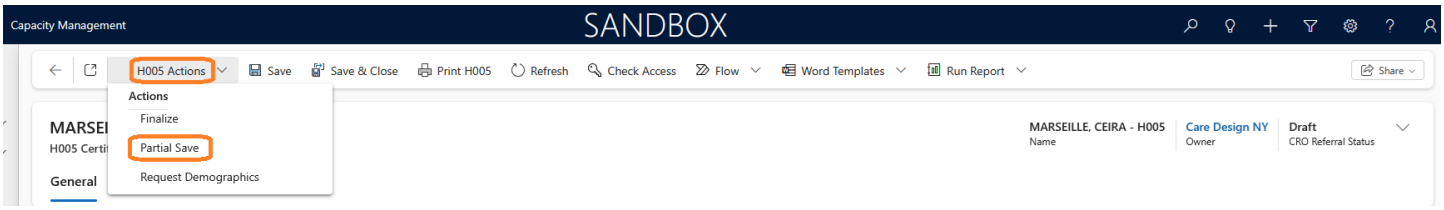


H005 Section C – Default value is N/A for each field. Allowable values for each field are: “Required”, “Preferred”, or “N/A”. Additional information *may* be required based on entries of “Required” or “Preferred”. In section “C”, if any residential considerations are indicated as “Required”, the user will need to upload supporting documentation for the requirement into the documents section of the referral record.

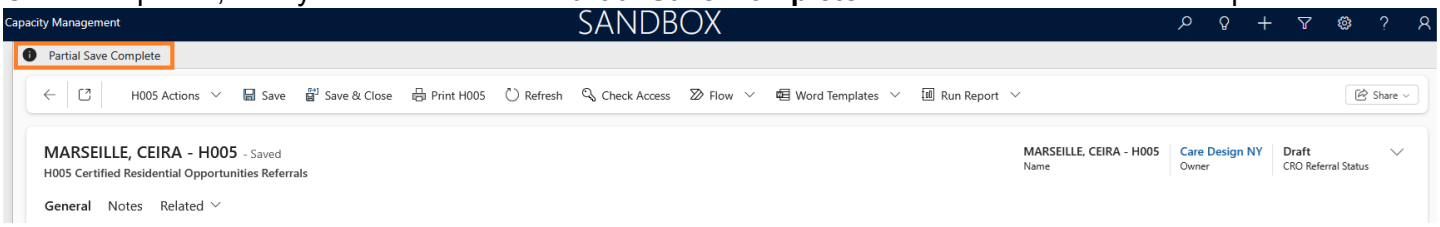

Capacity Management
SANDBOX
H005 Actions
Save
Save & Close
Print H005
Refresh
Check Access
Flow
Word Templates
Run Report
Share
MARSEILLE, CEIRA - H005 - Unsaved
H005 Certified Residential Opportunities Referrals
MARSEILLE, CEIRA - H005
Name
Care Design NY
Owner
Draft
CRO Referral Status
General
Notes
Related
C. DESCRIBE THE INDIVIDUAL'S CURRENT STRENGTHS, NEEDS, AND RESIDENTIAL CONSIDERATIONS
Gender Specific Home * N/A
Smoke Free Environment * N/A
Specific Dietary Need * N/A
Barrier Free - Wheelchair accessible to bedroom, bathroom, dining area and two evacuation points * N/A
Special shower/tub equipment * Preferred
Fenced Yard * Preferred
Delayed Egress * Preferred
Quiet Areas * Preferred
County Preferences * N/A
Pets Allowed * N/A
Single Bedroom * Preferred
Ramped Entrance * N/A
Special Lifts * N/A
Door/Window Alarms * Required
Specify what types of alarms are needed & describe behavior: * Flashing Alarms
Sprinkler System * Preferred
Support with Medication Administration * N/A
Type of Community * Preferred
Type of Community * City - walking distance to stores, food, parks, has side...
Secured Kitchen * Preferred
Communication Supports * N/A
First Floor Bedroom * N/A
Sensory Accommodations * Required
Flashing fire alarm light, shaker bed, etc. * N/A
Bed Alarms * N/A
Time Out Room * N/A
Enhanced Nursing Support On Site Daily * N/A
D. TO BE COMPLETED BY PERSON SUBMITTING THIS REFERRAL
By entering my name below I confirm that I have explained the residential referral process to the above named individual and/or the family/legal representative and that they acknowledge and understand that their personal information will be shared in order to assist the Residential Opportunities Team in identifying an appropriate residential opportunity, and that OPWDD will make best efforts but cannot guarantee to meet specific requests or find an opportunity in a specific geographic location.
Date * 12/8/2025
Name * Test
Relationship * Test
Phone Number * 518-555-1212
Email Address test@gmail.com

H005 Action: Partial Saving

Once fields have been entered, whether partially or completely, **the user MUST use the "H005 Actions" in the toolbar to save their progress. Click "H005 Action". Select "Partial Save"**.



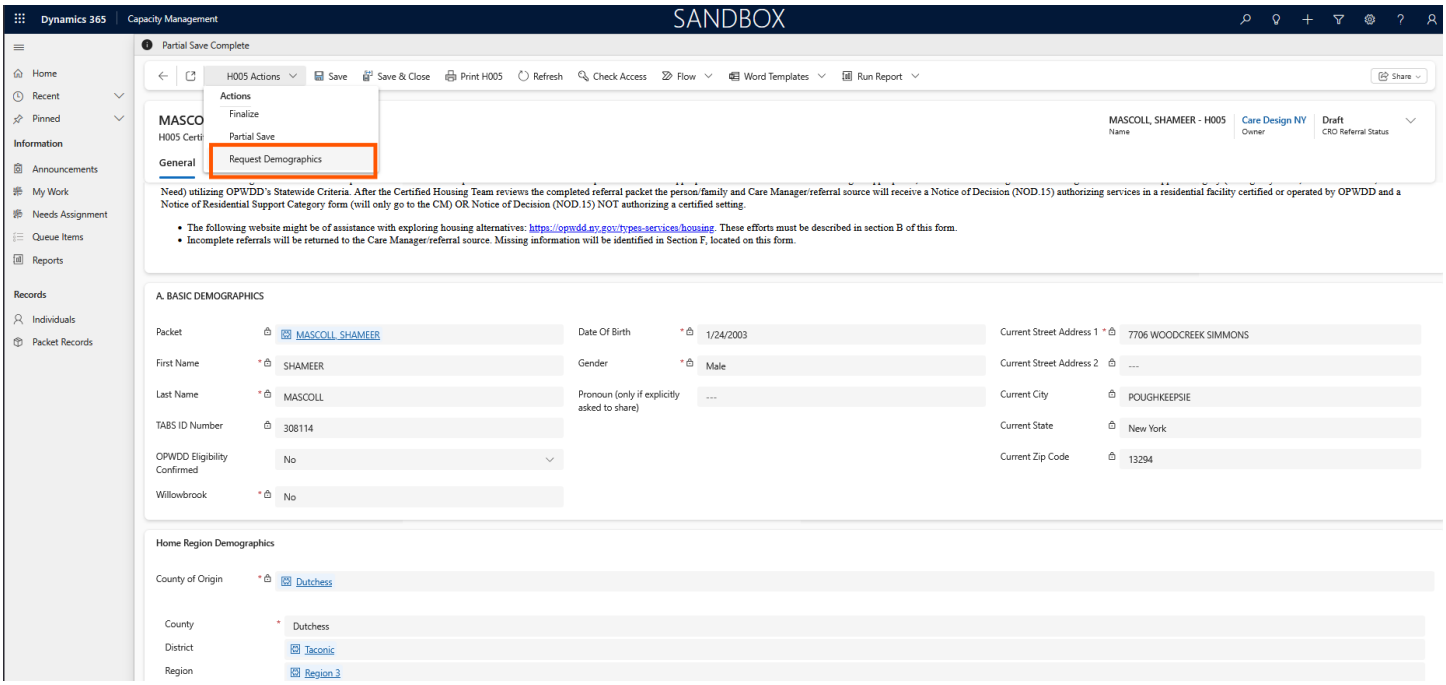
Once completed, the system will return a "**Partial Save Complete**" notification banner at the top.



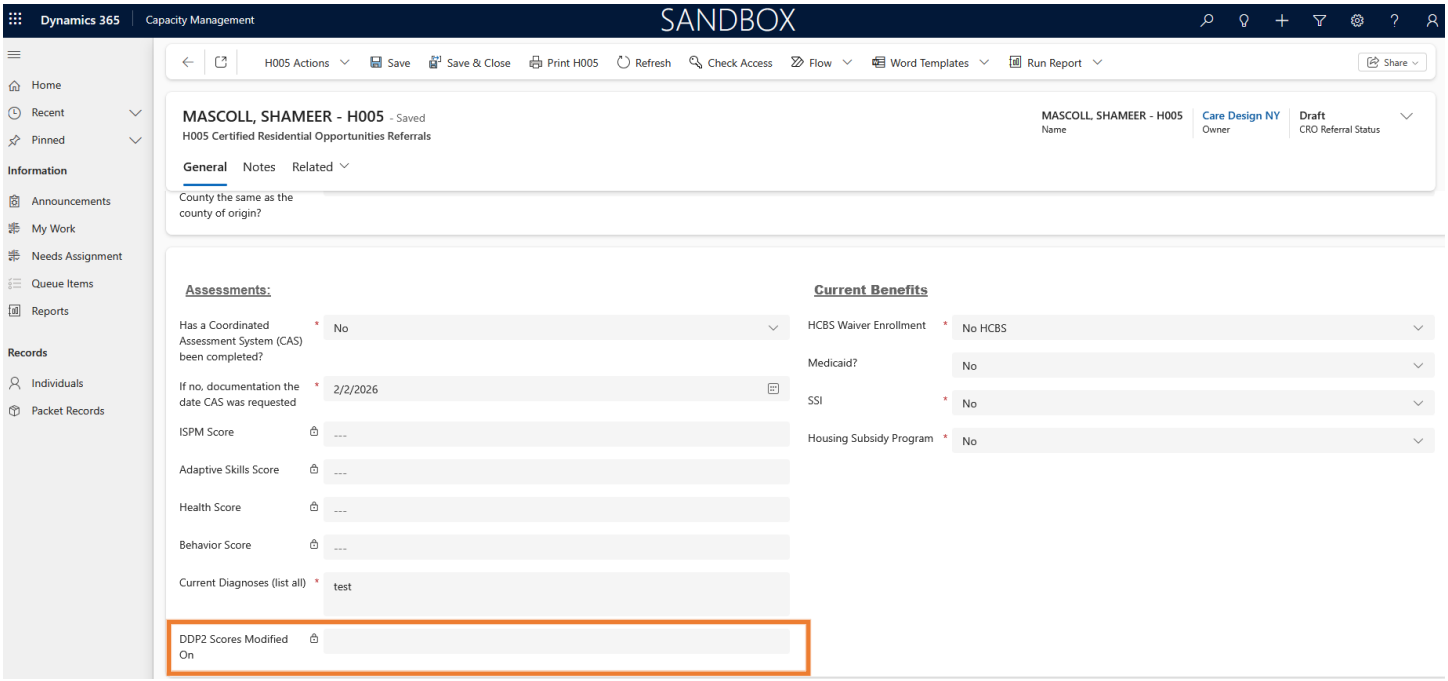
The default "Save" or "Save & Close" toolbar buttons will NOT save if any of the H005's required fields (*) have not been completed. For more details regarding this and system checks for errors, refer to the section Packet's System Checks and Notifications Banner.

H005 Action: Request Demographics

When a H005's required fields are all entered and saved, the user can use the "H005 Action: Request Demographics" function. This will send a request to CHOICES to pull in any updated demographics/DDP2 information and update the H005. These include other demographics such as address and DDP2 assessment scores. This action will take some time to process. It is recommended for the user to click the refresh button if necessary.



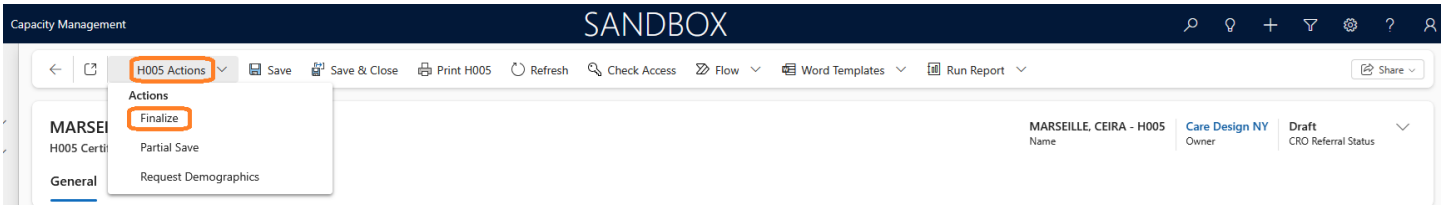
If the DDP2 score is updated through the “Request Demographics” function, the “DDP2 Scores Modified On” will populate with the date that the new information was updated. If there are no changes, the field will remain unchanged.



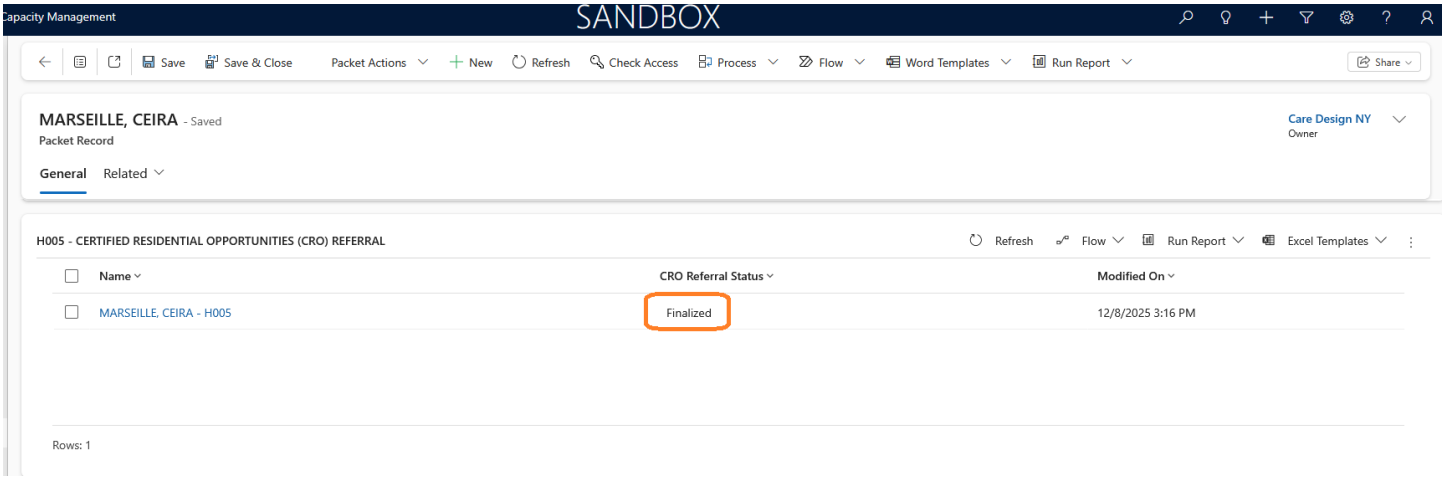
The “H005 Action: Request Demographics” action can only be used when all H005’s required fields have been entered, and while the H005 is still in a draft state (CRO Referral Status “=Draft” or “=Needs Review”).

H005 Action: Finalize

Once the user enters all required information in the H005 Referral, and performs a “Partial Save”, the user can then select the “Finalize” option under “H005 Actions”. The finalize action indicates that the H005 Form is complete and ready to be submitted as part of the complete referral packet. Once finalized, the user can no longer edit the form. All packet documents must be finalized in order for the referral packet to be submitted.

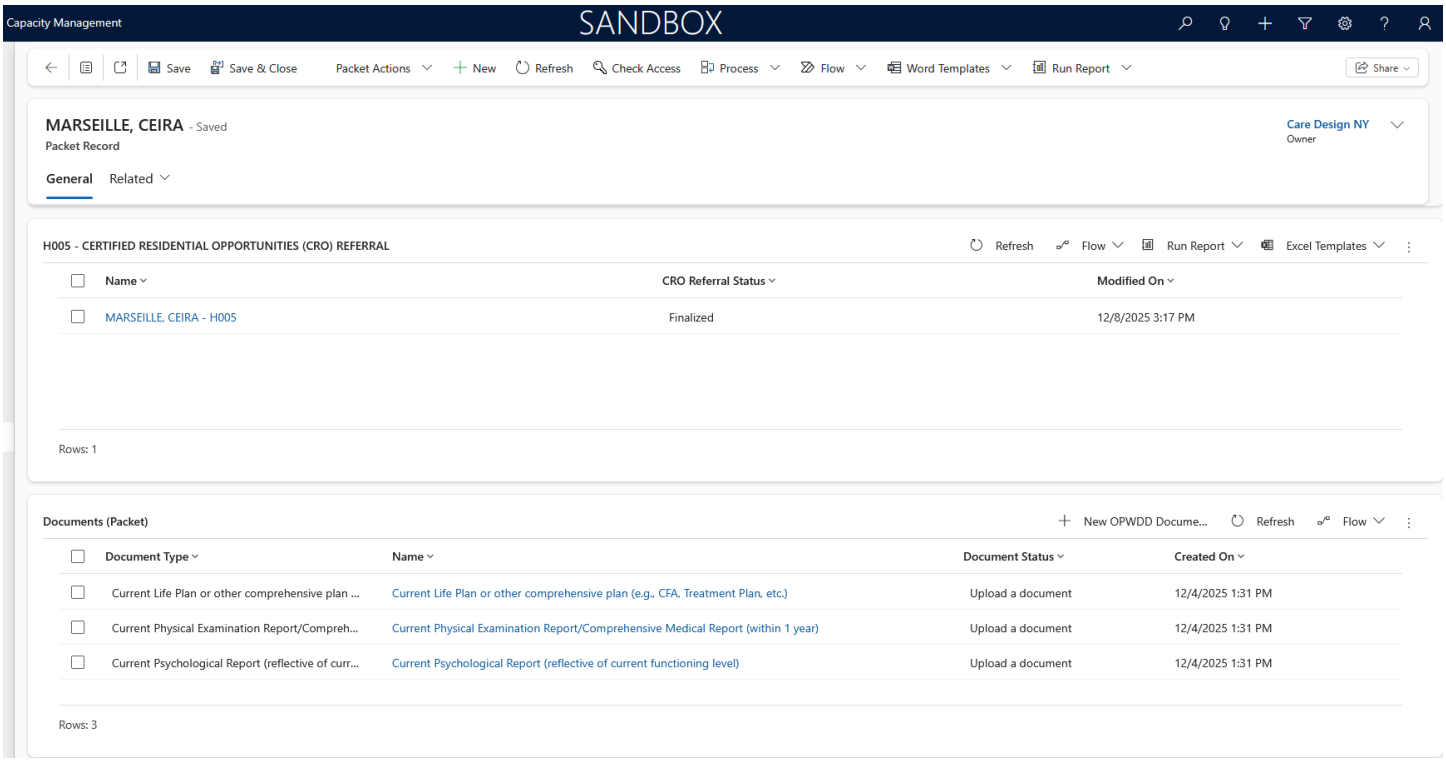


Once finalized, the system will bring the user back to the Individual Packet. The H005 CRO Referral now has a status of “Finalized”.



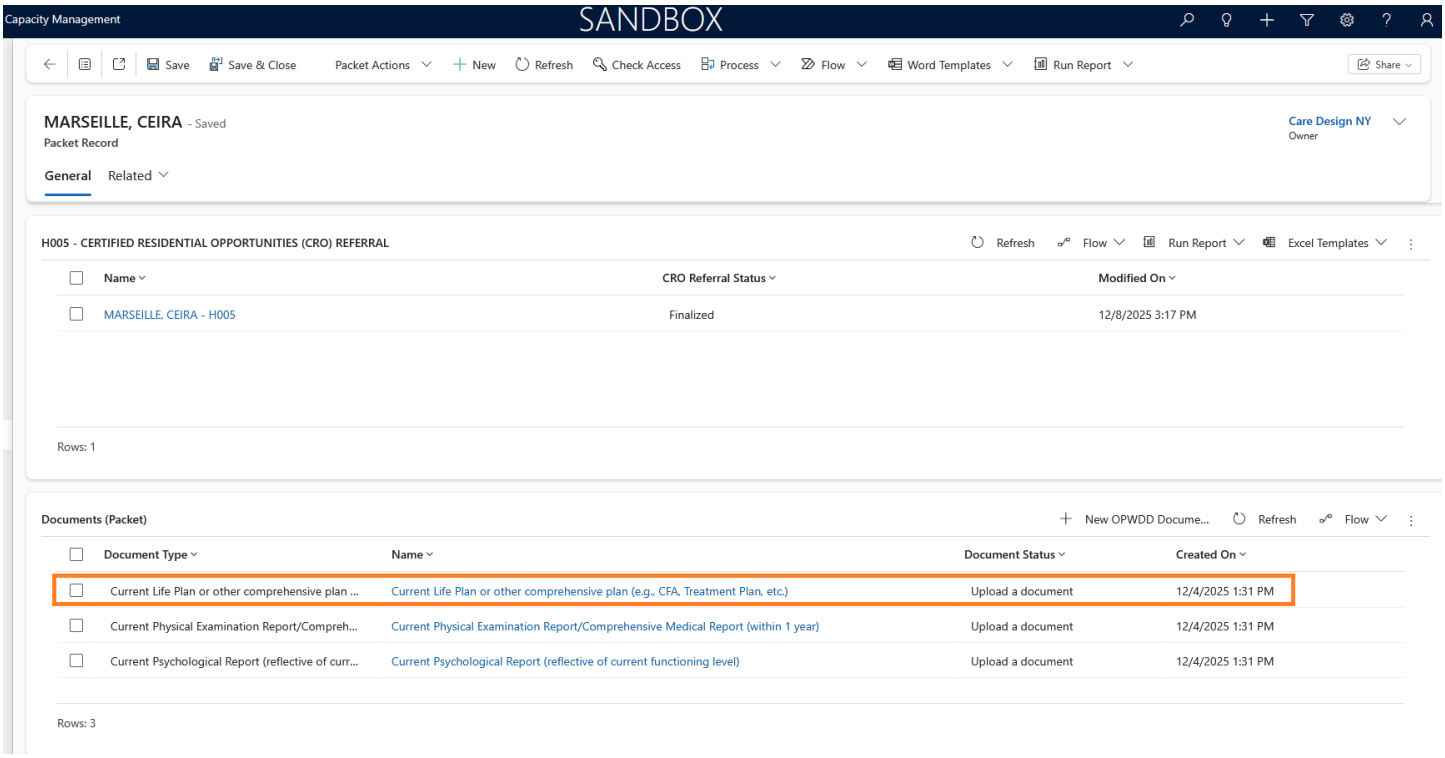
Documents (Packet)

All packets preload with select standard documents, including Life Plan, Physical Report, and Psychological Report. There are additional documents that will preload depending on data entered in the H005. For example, if user selected “Yes” to “Is there a legally appointed guardian?” a “Documentation of Legal Guardianship (if applicable), document type will preload. The “Document Status” column will indicate whether the document has been completed or not. A status of “Upload a Document” means the document has not been added and/or finalized.

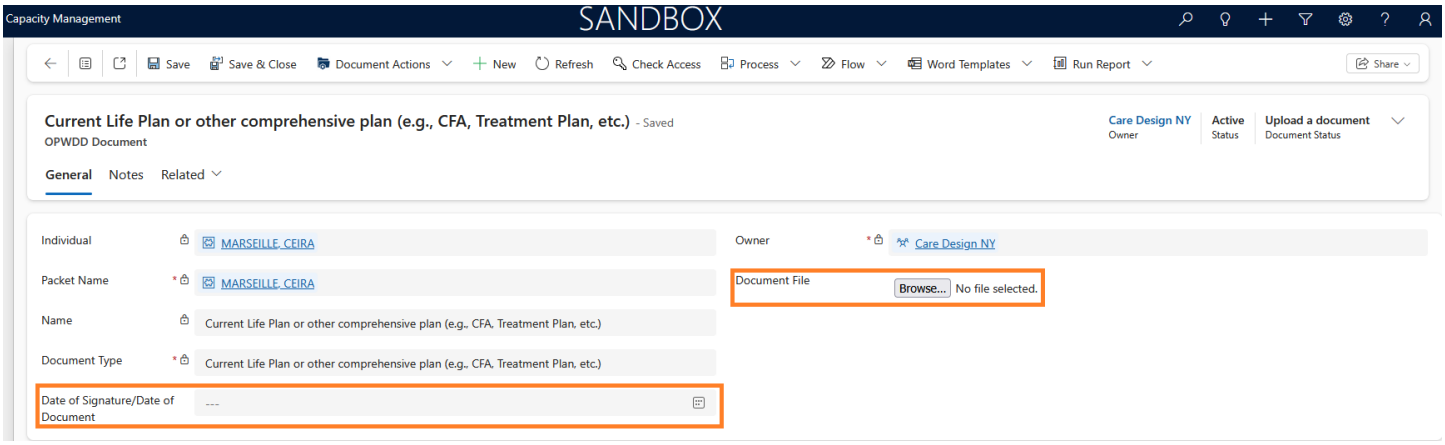


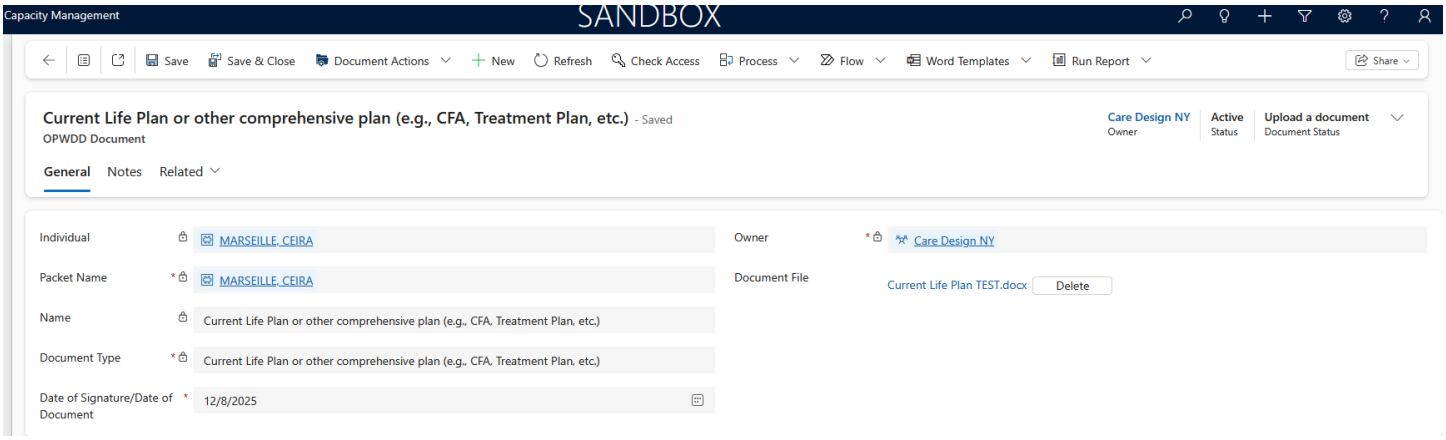
Document Upload

To begin a document upload, click on a document's row.



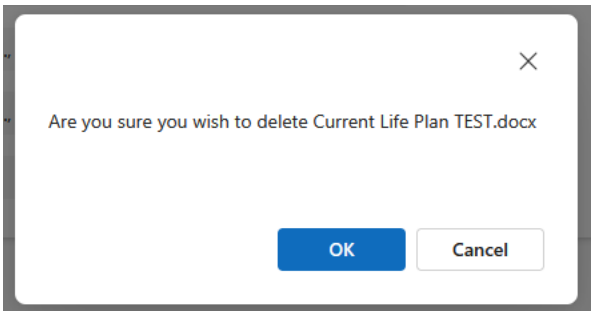
The user is required to complete the "Date of Signature/Date of Document" (which is the either the signature date, or date of document, not the date of upload) and upload the document by clicking on the "BROWSE" button.





Only one file can be uploaded per document.

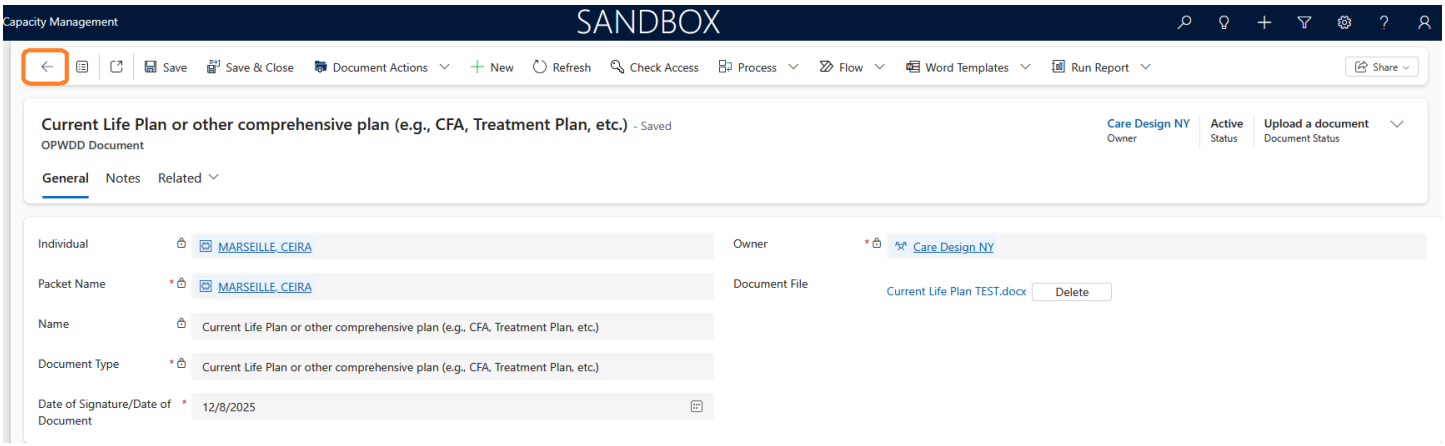
To delete a document, click the “Delete” button. Click “OK” to confirm.



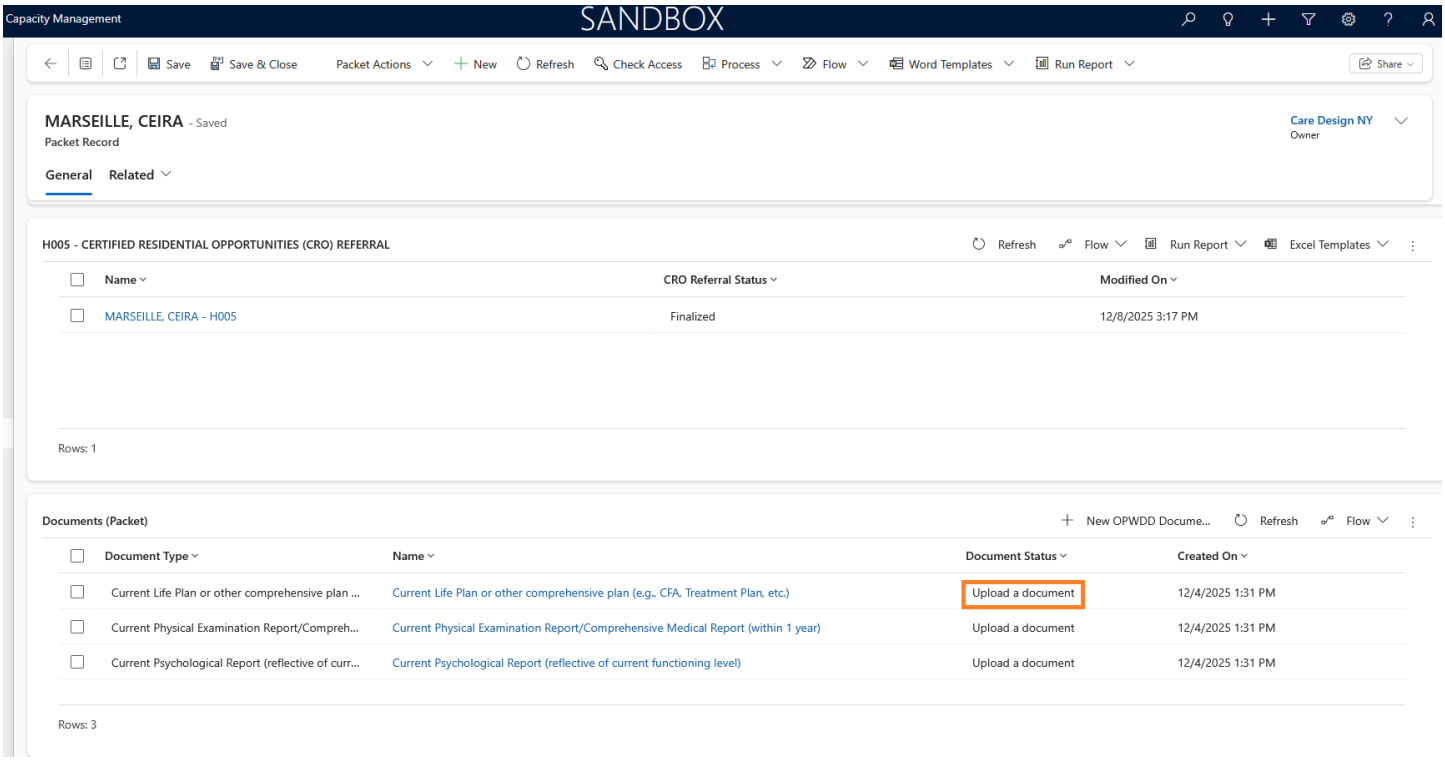
A new document can then be uploaded. Please note, the “Date of Signature/Date of Document” field will not clear when the file is deleted. The user will need to manually delete and/or re-enter this information.

Saved Document

When finished, click on the back arrow to return to the main packet.

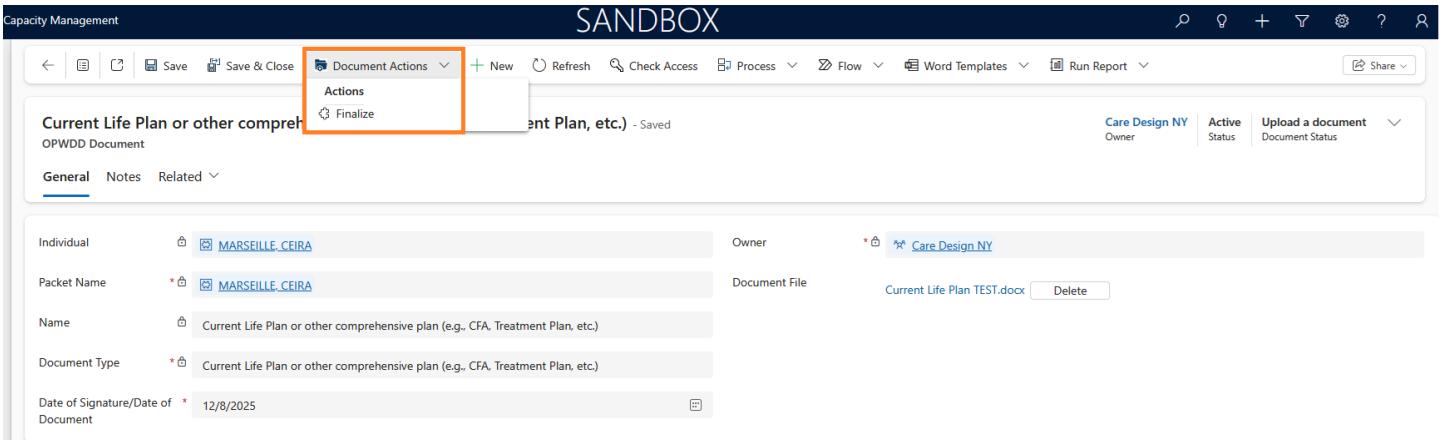


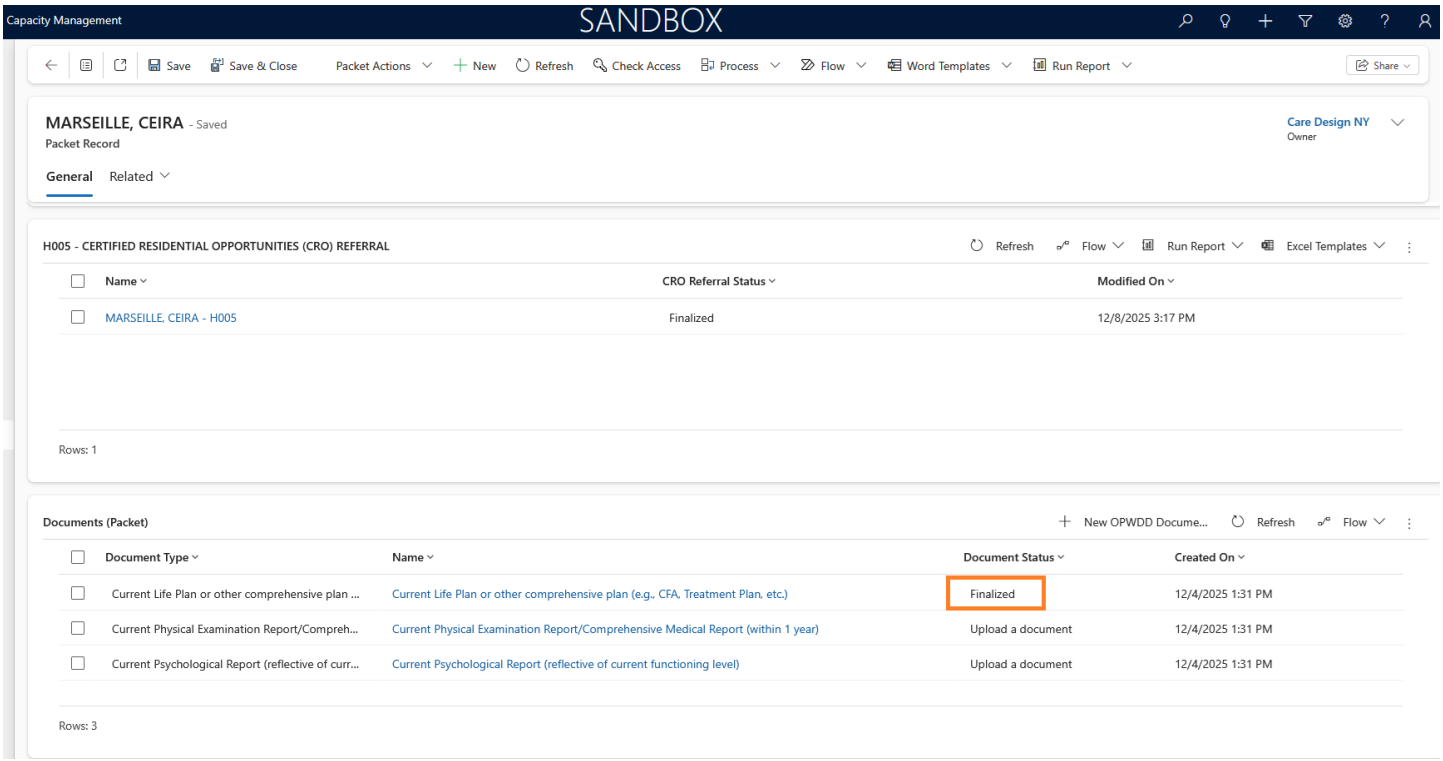
When exiting the document, the system will automatically save any changes made. The document's status will remain as "Upload a Document" until the document is "Finalized".



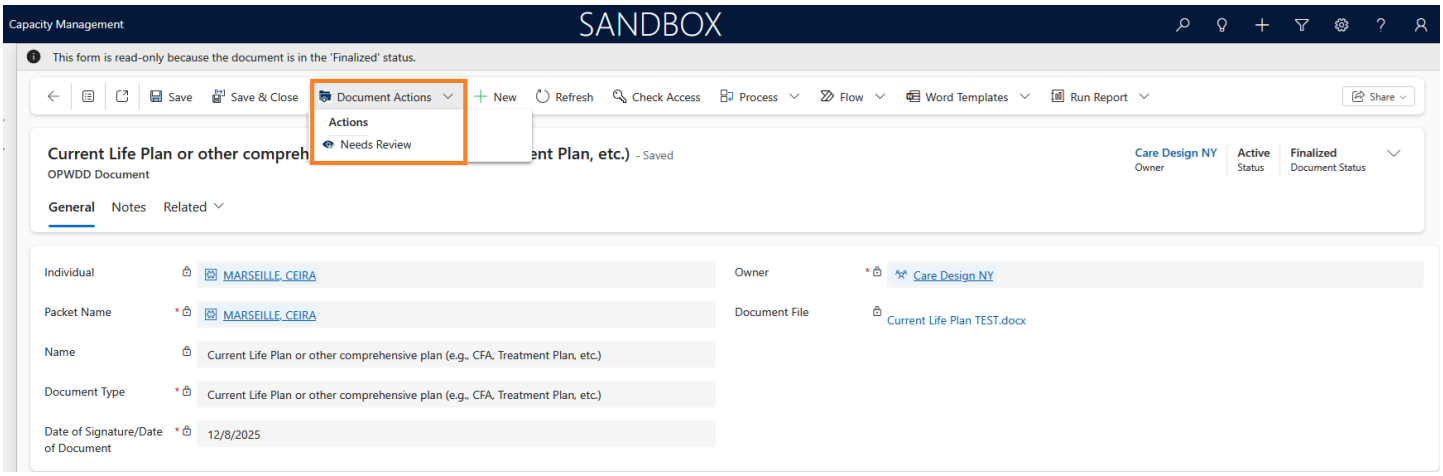
Document Action: Finalize

Once the user completes their changes and uploads, they can finalize the document. The user will navigate to the “Documents Actions” menu and select “Finalize”. The user will be brought back to the list of documents where the document will now display a status of “Finalized”.





A finalized document can be edited as long as the packet has not been submitted. Click on the document to be edited. Navigate to the “Document Actions” menu and select “Needs Review”. This will unlock the document so that edits can be made. The user will need to finalize the document again once edits are completed. Once the packet is submitted, this option is no longer available.

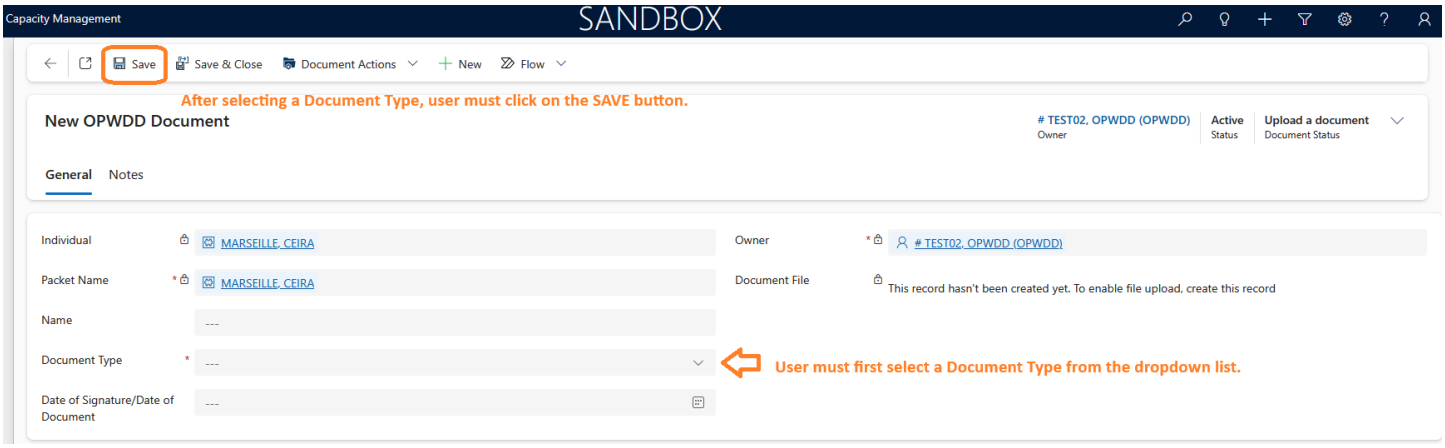


Adding New Documents (CCO-CM)

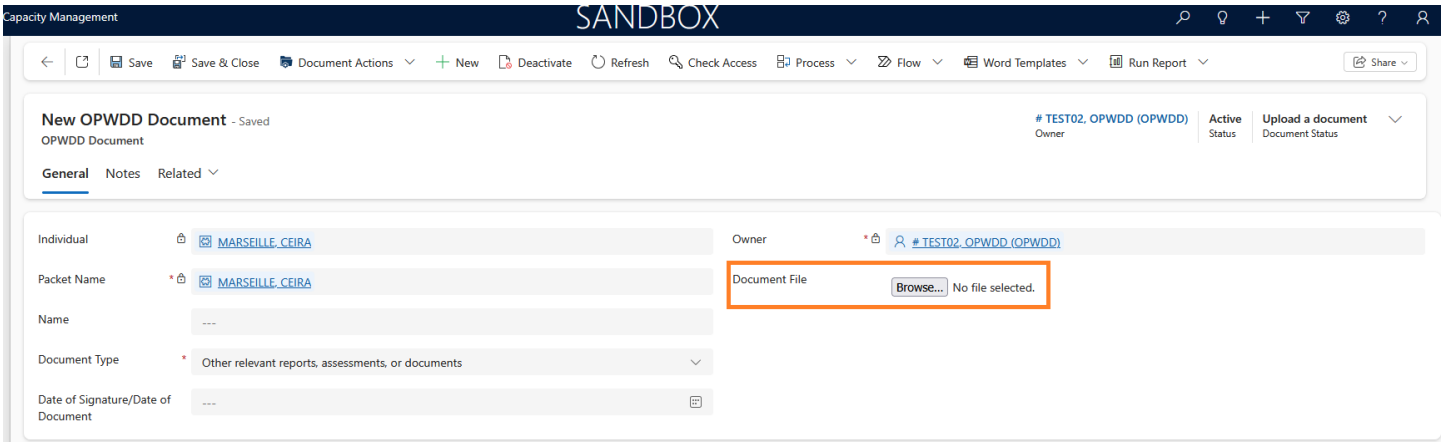
Users can add/create document containers for additional documents that were not pre-loaded by default.

Click on “+New OPWDD Document”.

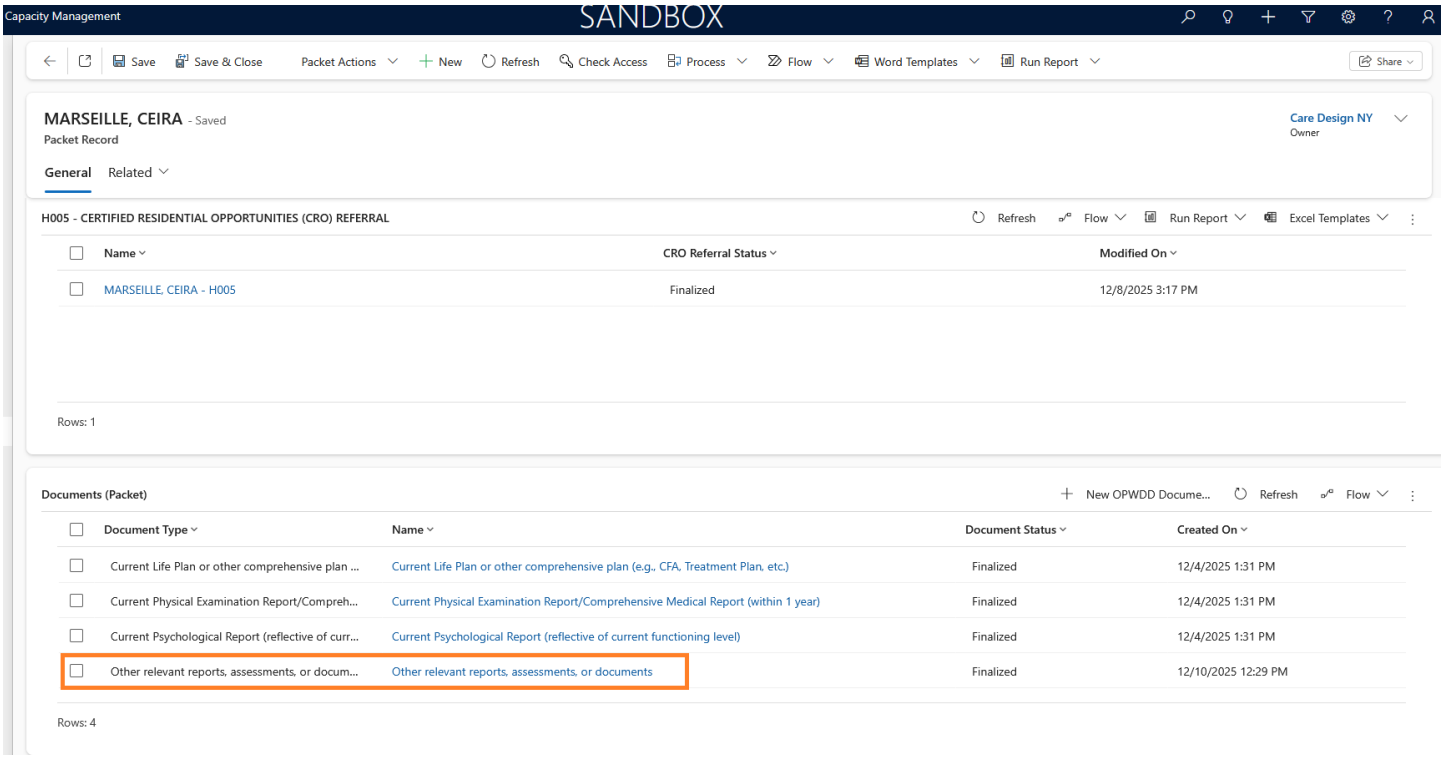
Unlike with pre-loaded document containers, the user will need to manually add the “Document Type” , “Name (optional)” and “Save” in order to fully create the document.



Once the document has been saved, the document file upload function will be enabled. The user can then upload the document file and finalize as per the Document Actions: Finalize section.



Once the document has been added and the user returns to the main packet, the new document will be displayed.

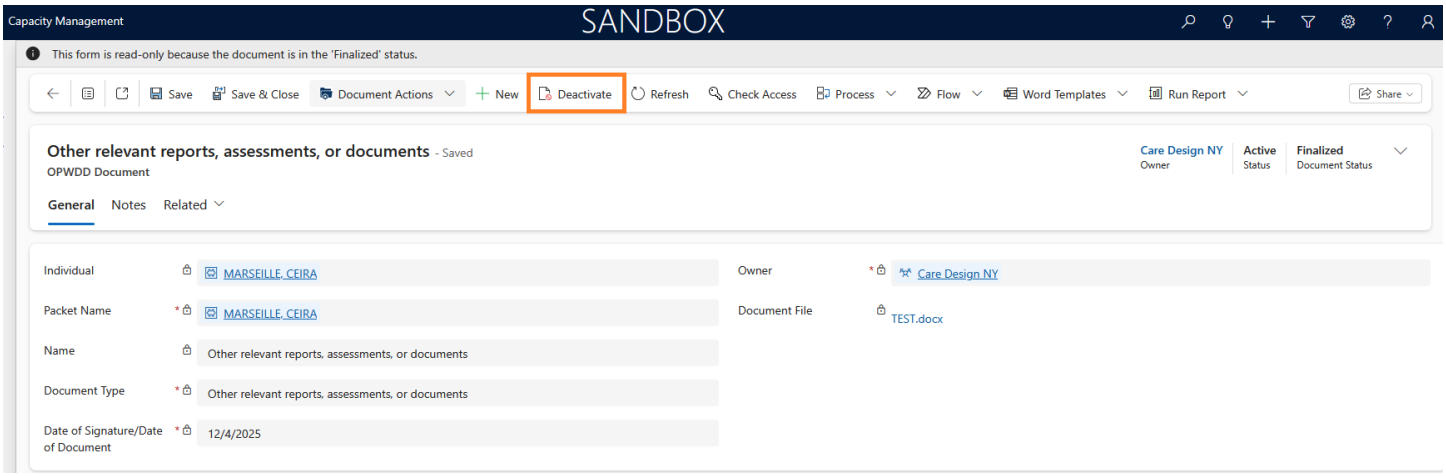


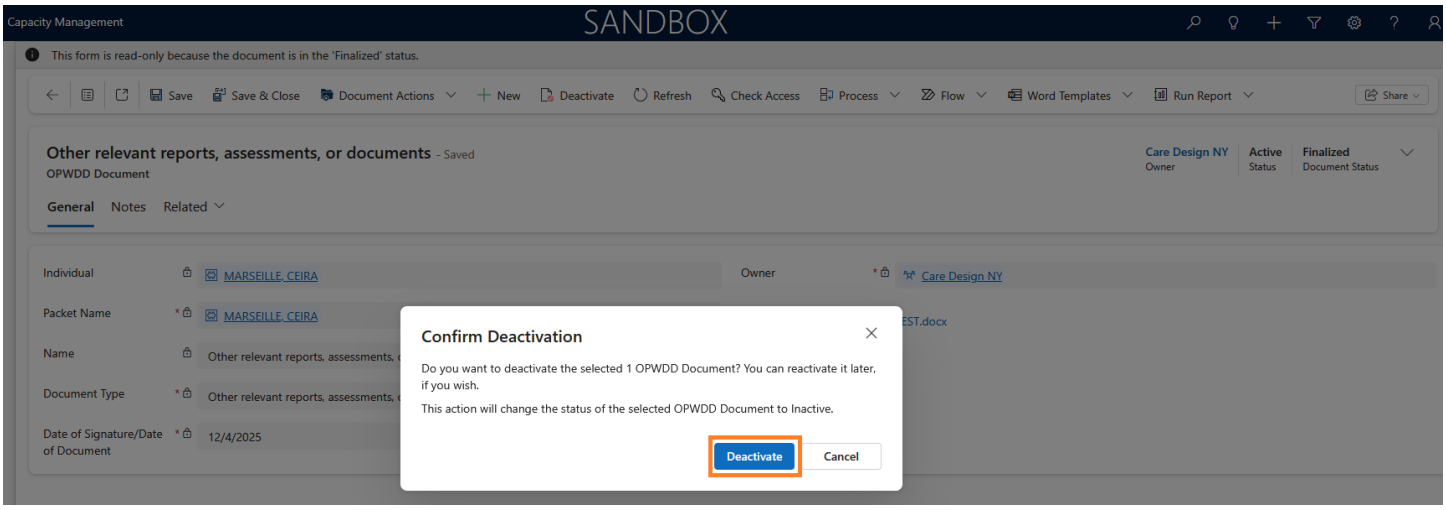
Deactivating Added Documents

The "Deactivate" functionality is restricted to manually added document containers. It is not available for documents that were pre-populated in the packet. It allows users to inactivate documents that may have been added in error or in other specific situations. The “Deactivate” function can only be used if the packet has not yet been submitted. This function will also be disabled for a document once it has been part of a Missing Information or Request for More Information exchange with OPWDD and subsequently resubmitted by CCO.

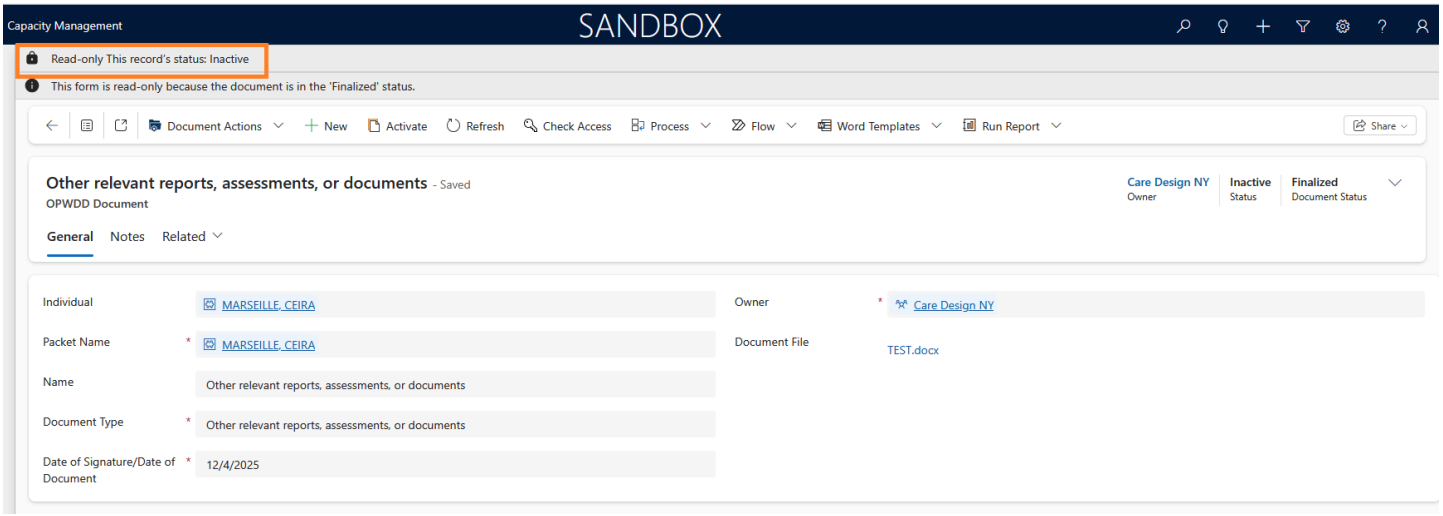
The document status can be “Upload a Document” or “Finalized” to deactivate it.

Click on the document to be deactivated. Select “Deactivate” from the toolbar menu. A message will appear asking to confirm the deactivation. Click the “Deactivate” button.

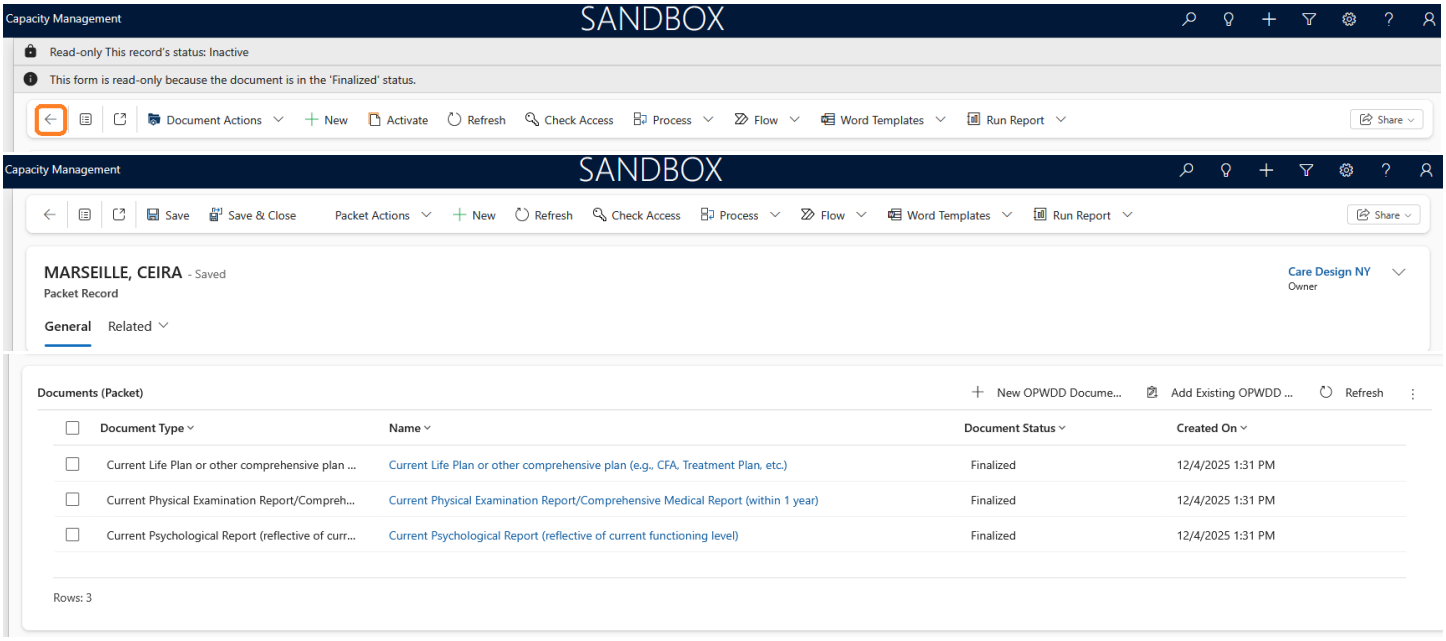




The document container is now “Inactive”.

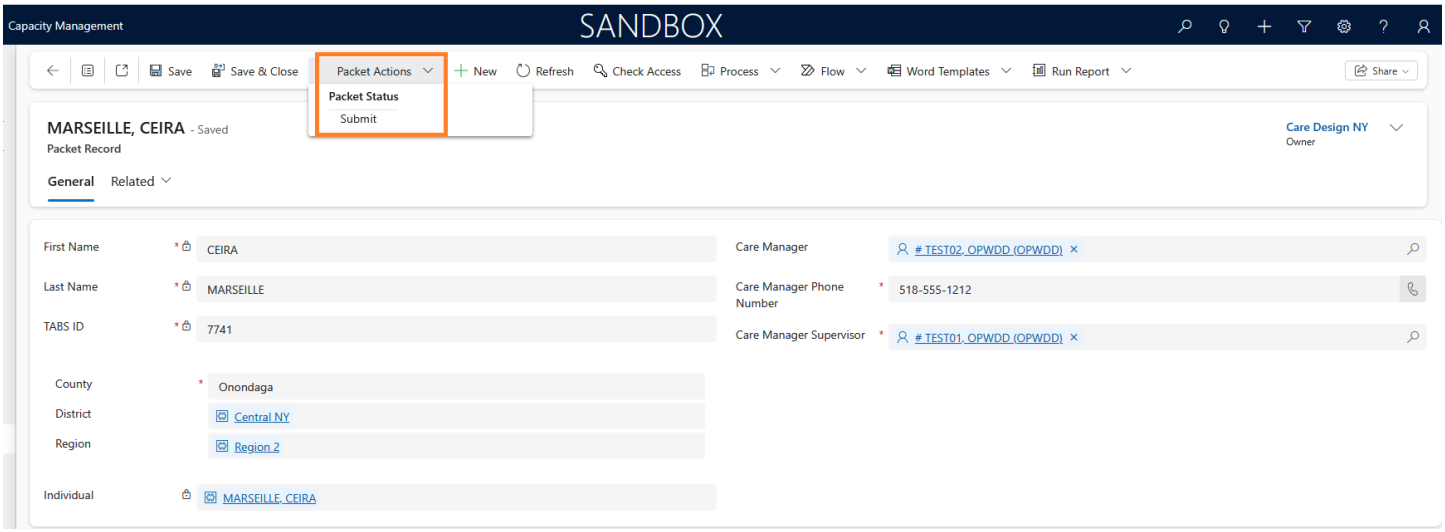


When the user exits out of a inactive document, the document is removed from the list and can no longer be accessed.

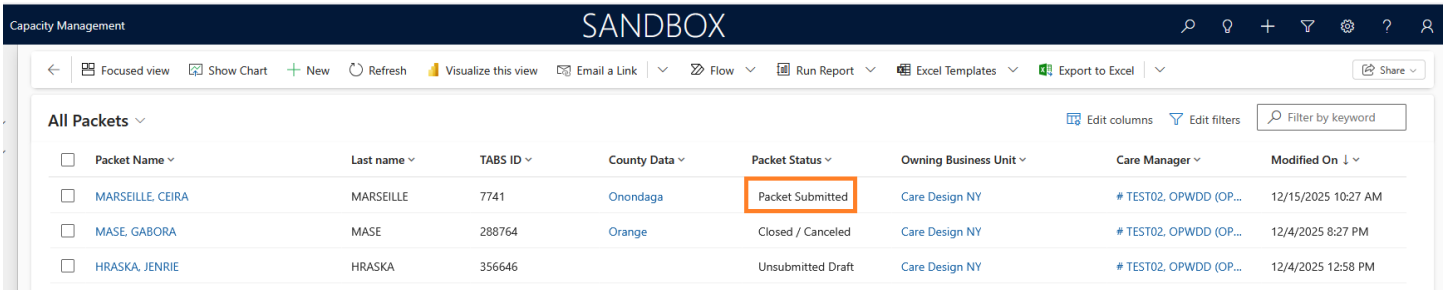


Packet Actions: Submit

Once all necessary sections have been completed and “Finalized”, the user can use the “Packet Actions” to “Submit” the person’s packet.



Upon submitting the packet, the user is taken back to the **ALL PACKETS** page. The screen will refresh the packet’s status from “Unsubmitted” to “Packet Submitted”.



Packet System Checks and Notification Banner

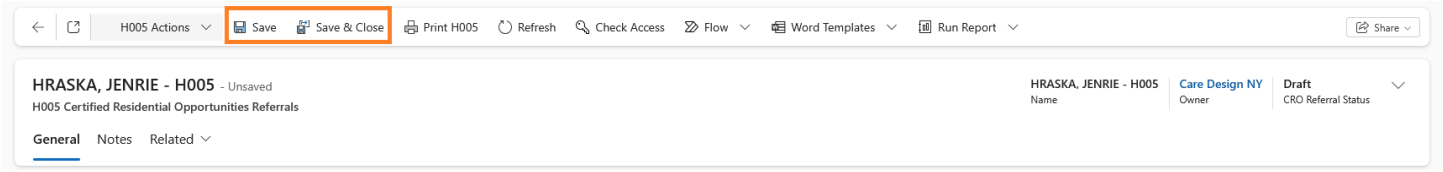
The system has several ways to check for errors. When an error is present, a notification banner is triggered informing the user what the errors are, such as missing/incomplete fields or not-finalized sections.

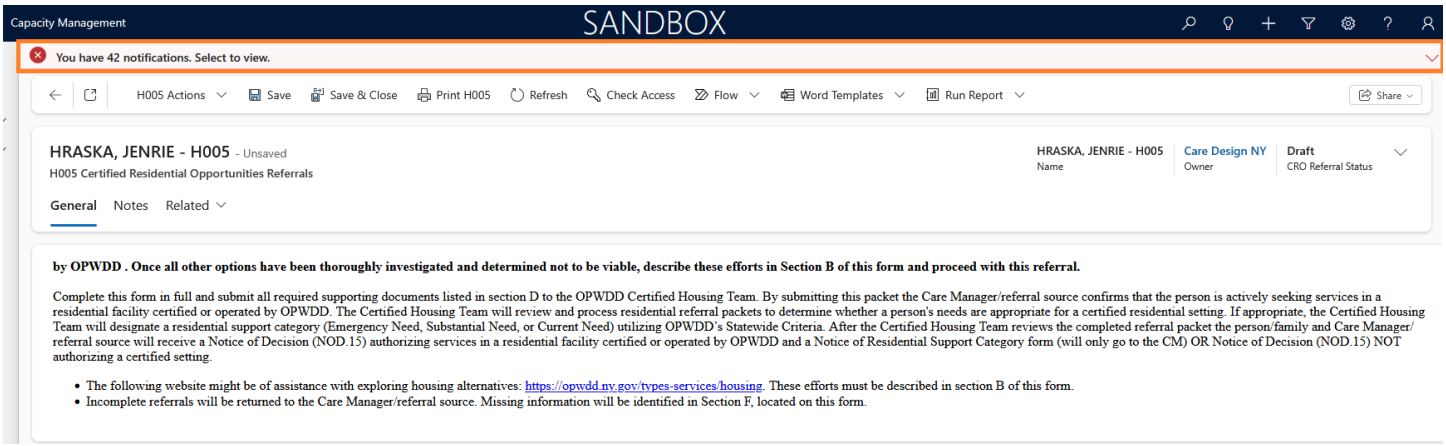
The following are some case scenarios where the system checks trigger the notification banner.

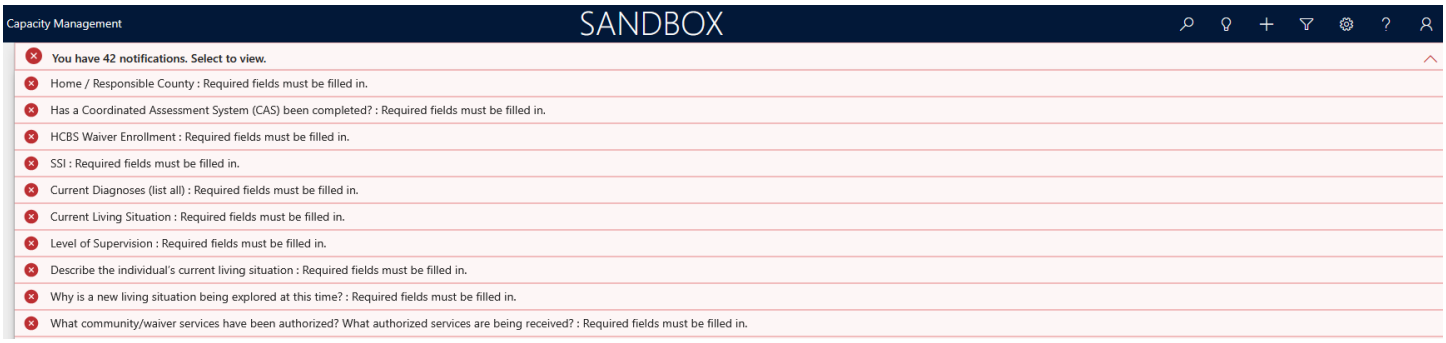
1. While the H005 referral is still incomplete: if the user uses the default “Save” or “Save & Close” tool buttons (note these will NOT save the container), uses the “H005 Action” to “Finalize”, or exits out using the back-arrow button.
2. If the user performs a “Save” or “Packet Action” to “Finalize” while a document container is still incomplete.
3. If the user performs a “Packet Action” to “Finalize” while the packet is still incomplete.

The above-mentioned methods will trigger an error check, and a pink notification banner will be displayed. Clicking on the red X will expand the list and display all errors.

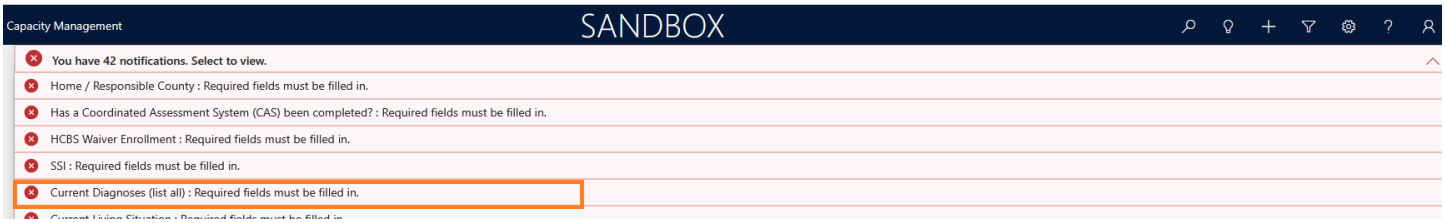
For scenario #1, where a user attempts to use the “Save” or “Save & Close” toolbar options while the H005 is incomplete.

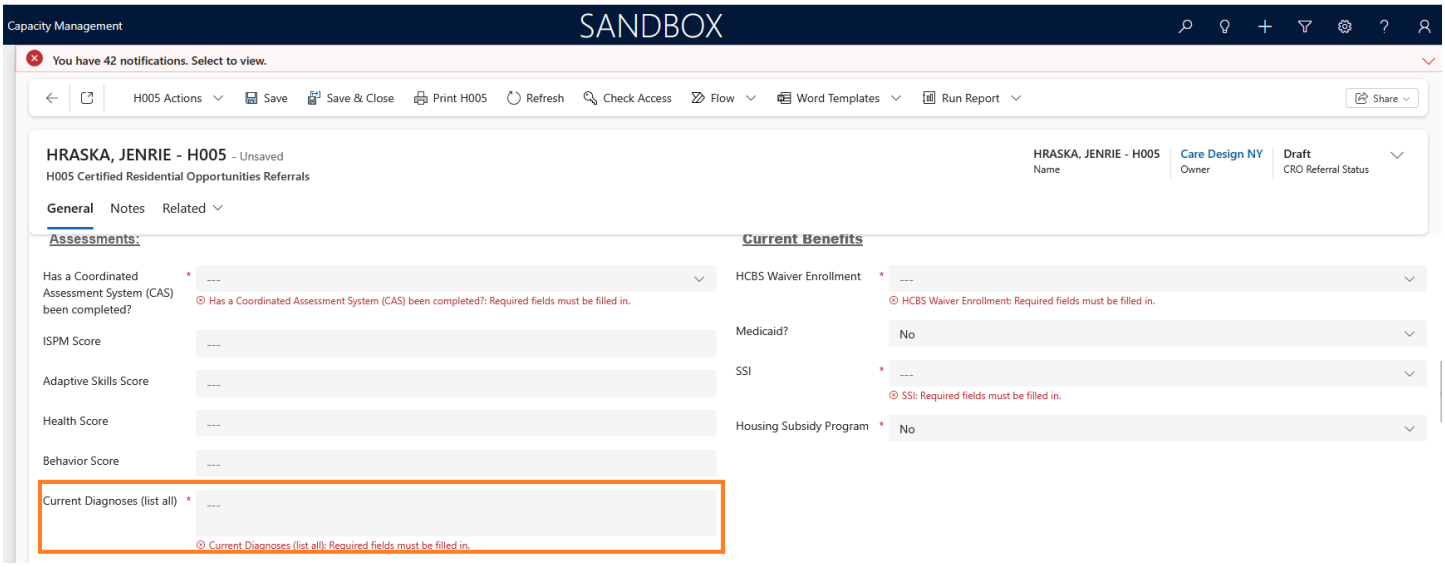




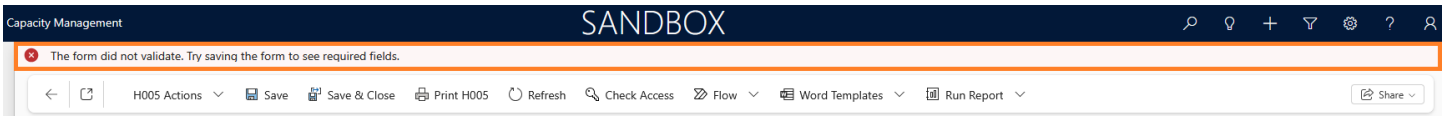


Clicking a particular notification will bring the user to that field’s section to complete or correct.

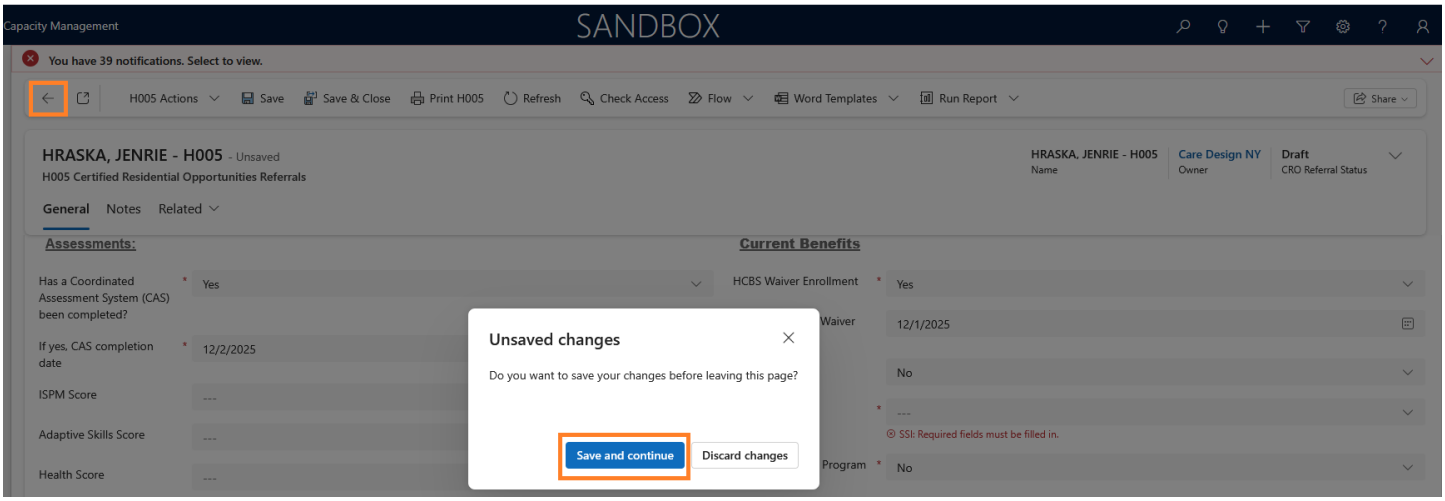




If the user attempts to “Finalize” the H005 while it is still incomplete, the notification banner will return a message informing the user that the form cannot be validated. Please note, the failed-to-validate message does not take the user to the actual error. In this case the user can utilize the “Save” option on the toolbar to trigger a more specific definition of the error as seen above.

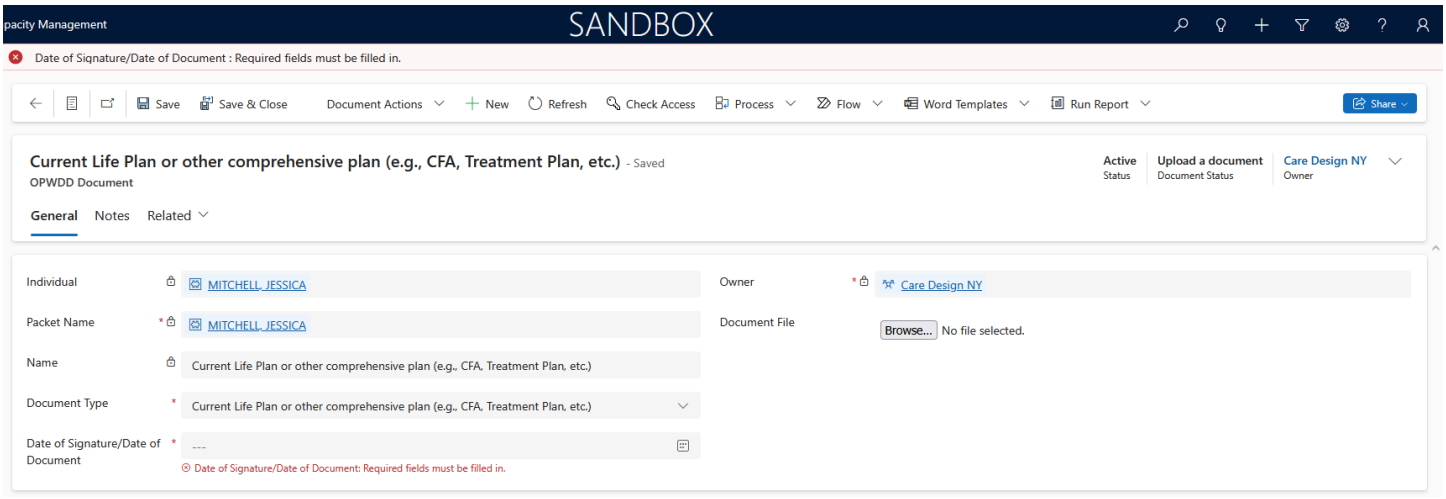


If the user attempts to exit using the back-arrow button without first saving the H005, a popup will appear asking the user if they want to save their changes. Users must click on the “Save and Continue” button and then navigate to the “H005 Actions” menu option and select “Partial Save”. Alternatively, use the default “Save” button if the entire H005 has been completed.

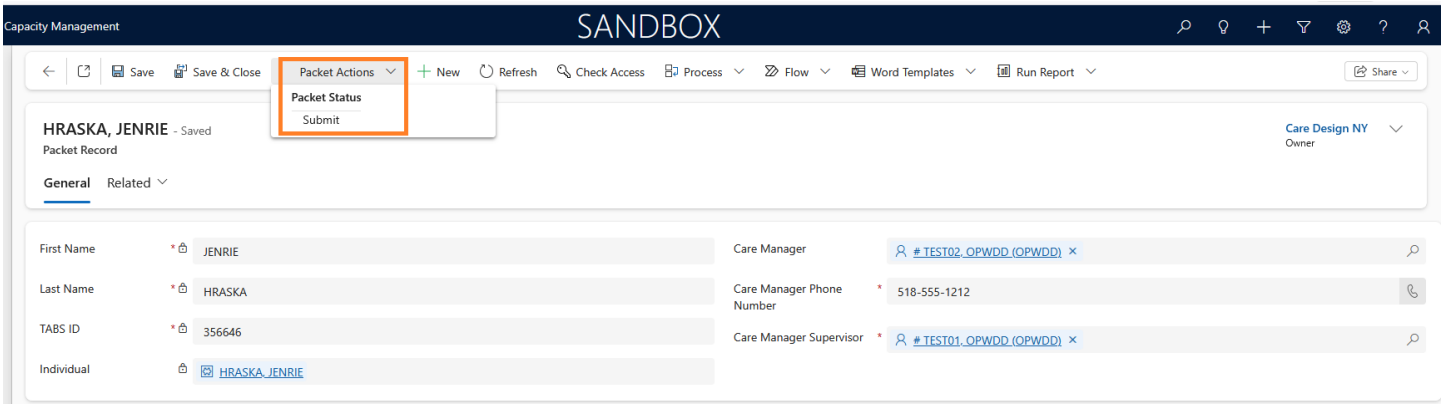


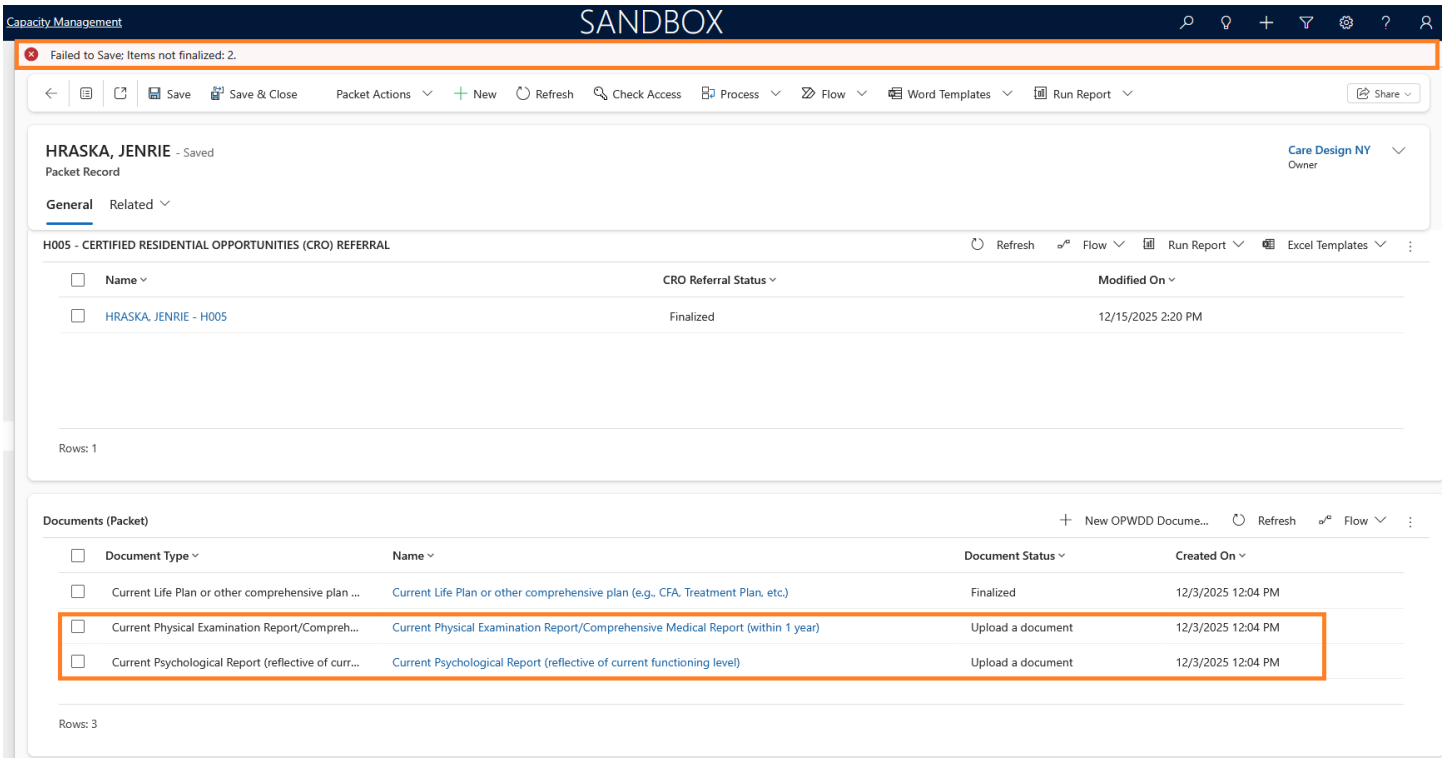
If the user selects “Discard Changes”, all unsaved entries will be deleted. The user will be returned to the main packet.

For Scenario #2: If a user attempts to "Save" or "Finalize" a Document with incomplete fields or file uploads, a notification banner will appear, indicating the error (e.g., missing fields).



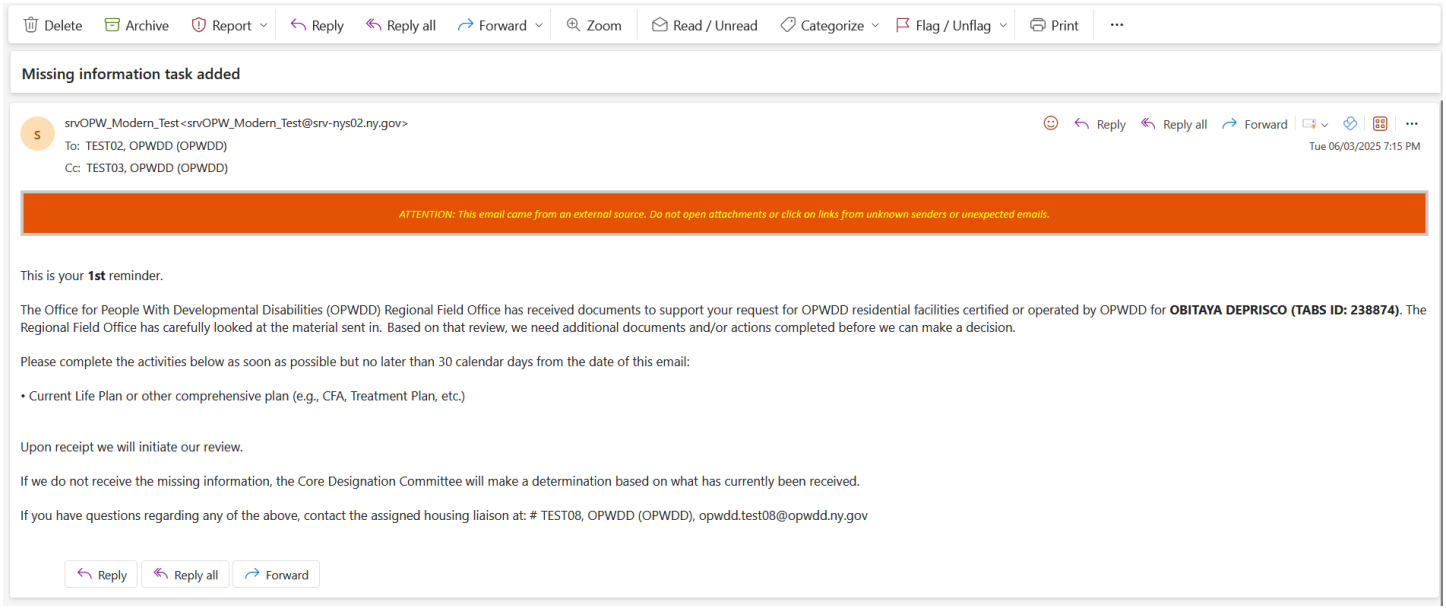
For Scenario #3: If the user attempts to submit an individual packet with containers that have not been finalized, the system will perform an error check and inform the user what is missing through the notification banner. In the below screenshots, it can be seen there are two documents that were not finalized.

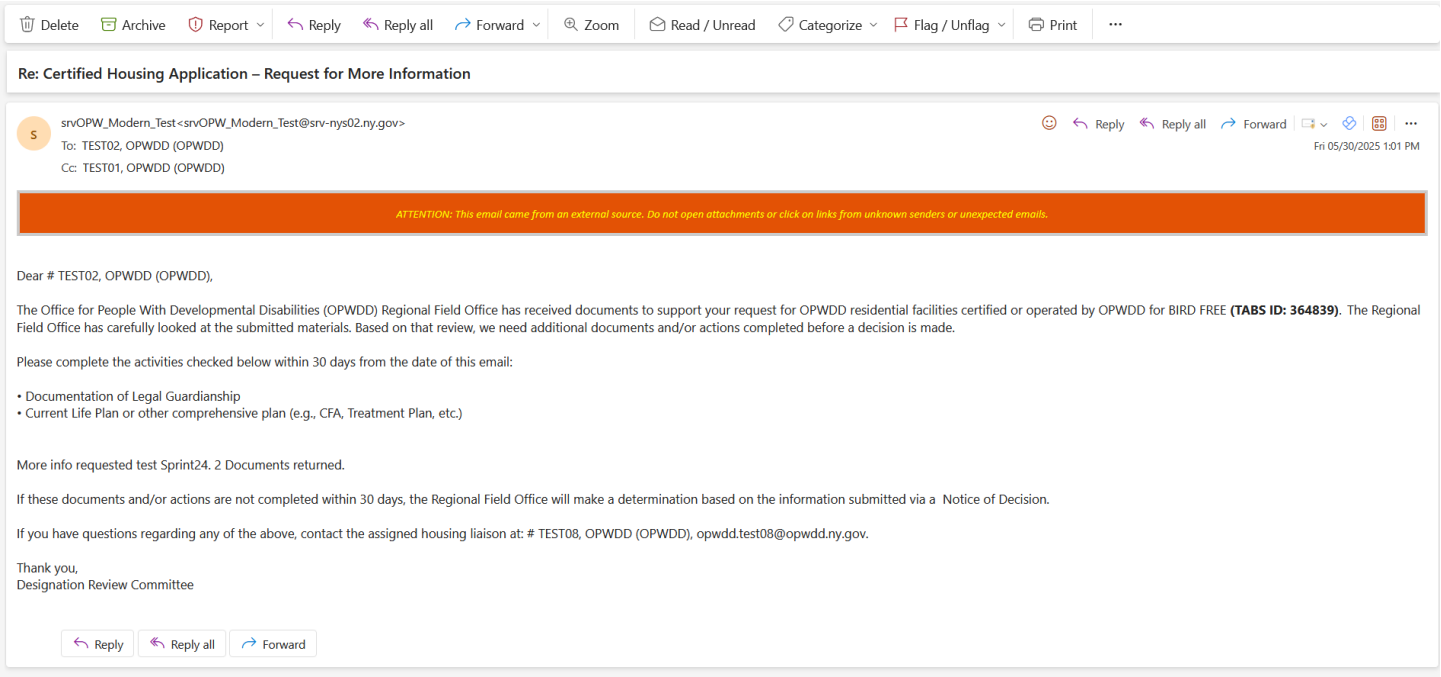




Resubmitting Packets for “Missing Information”, “Needs Review” or “Require More Information”

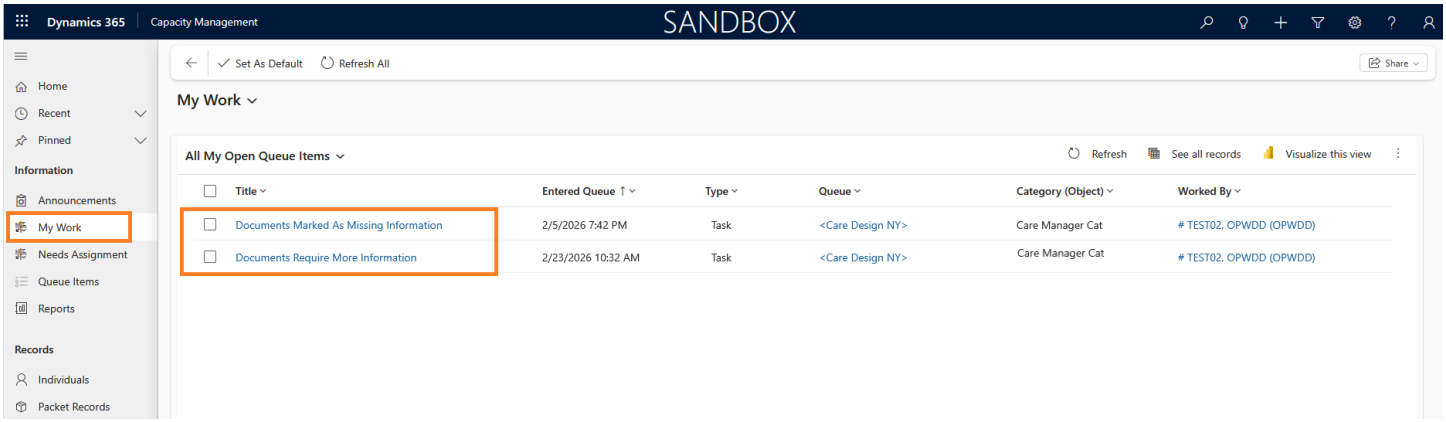
Packets can be returned by OPWDD for various reasons. When a packet is returned, the Care Manager will receive both an email and a task item in the “My Work” section. The email should identify the items that need action from the Care Manager. Email template examples below.



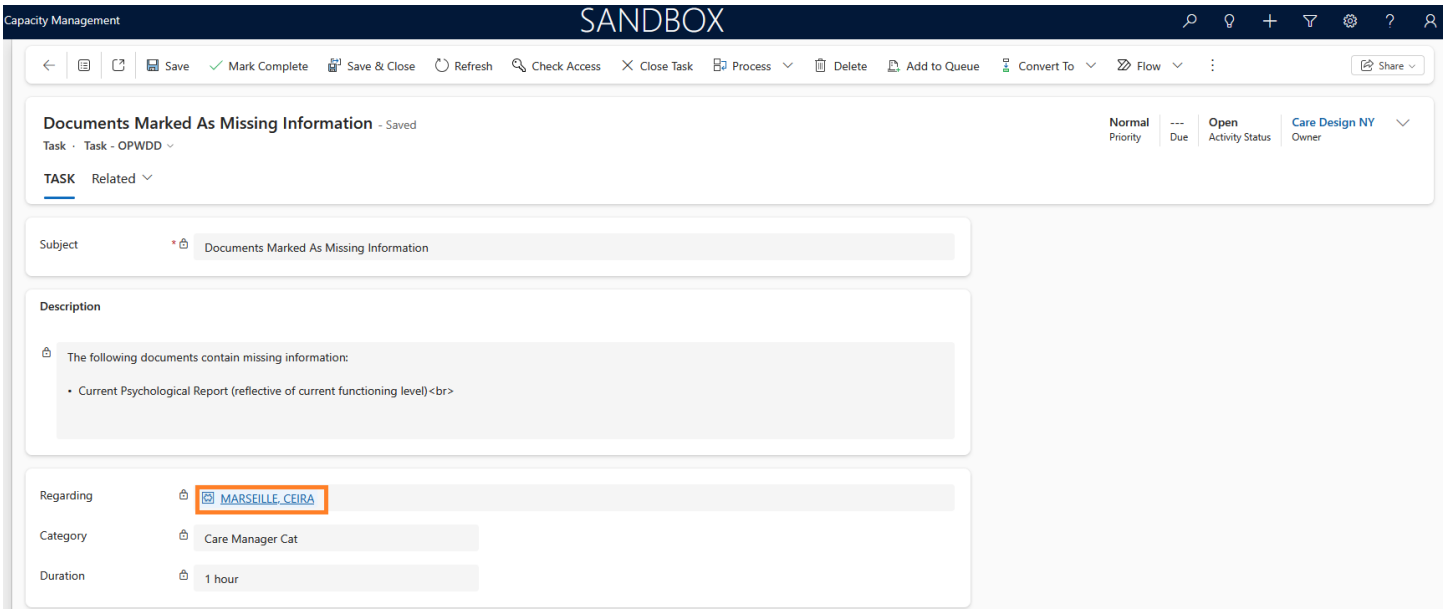


Navigating to Returned Packets

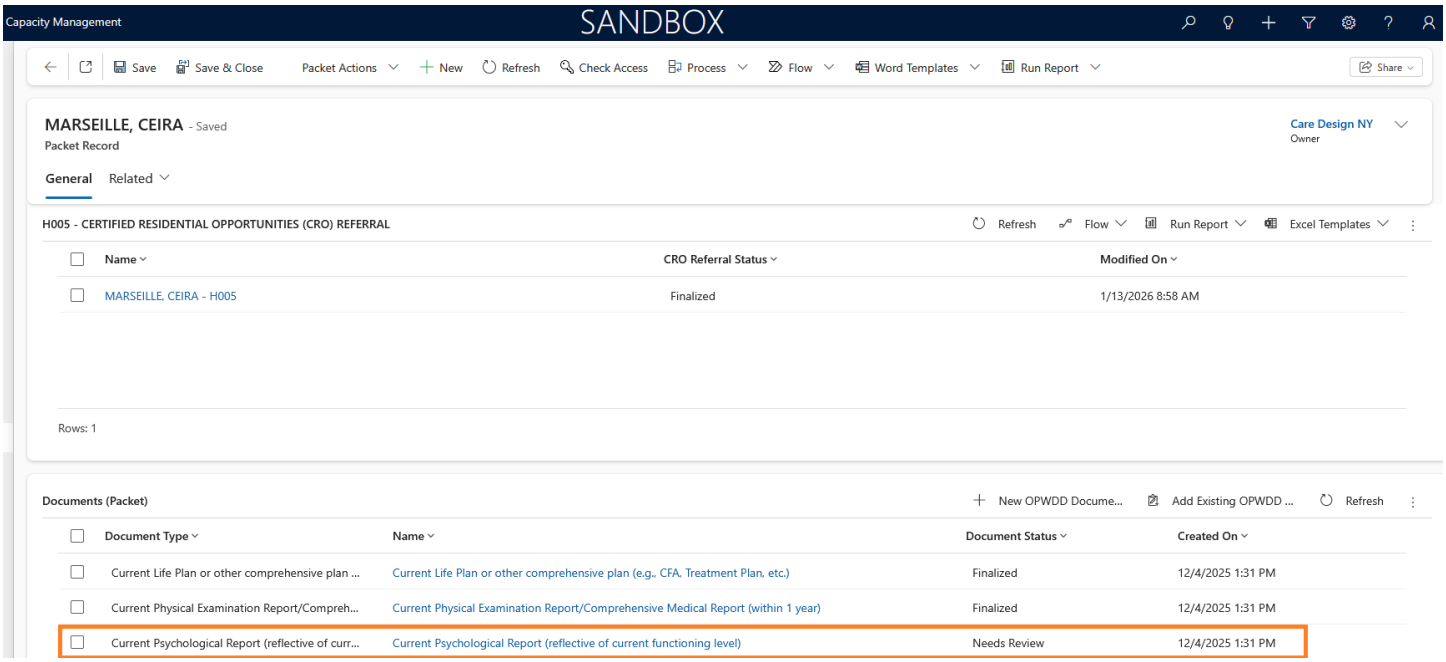
Click on the “My Work” menu option on the left side menu. Click on the task item to view details, description of issues and person’s name.

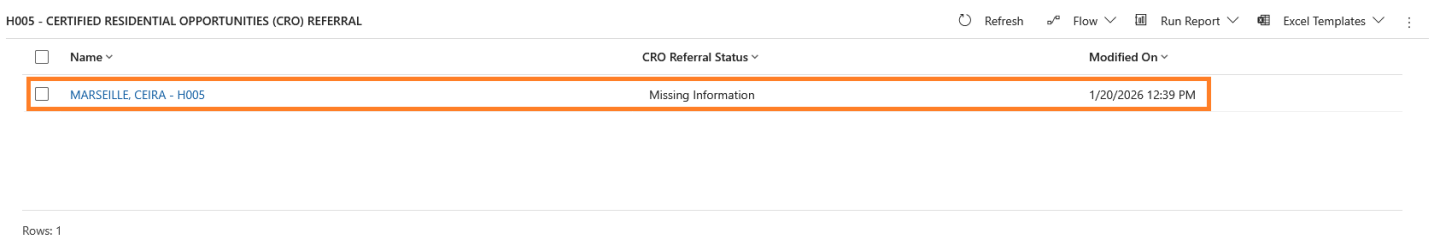


Click on the person’s name to enter the related packet.



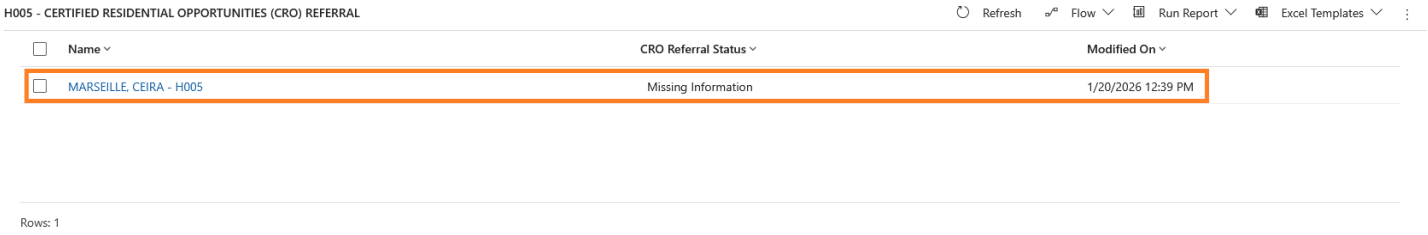
Once in the packet, the user can navigate/scroll to see what was marked for “Missing Information”, “Needs Review” and/or “Missing Information”.



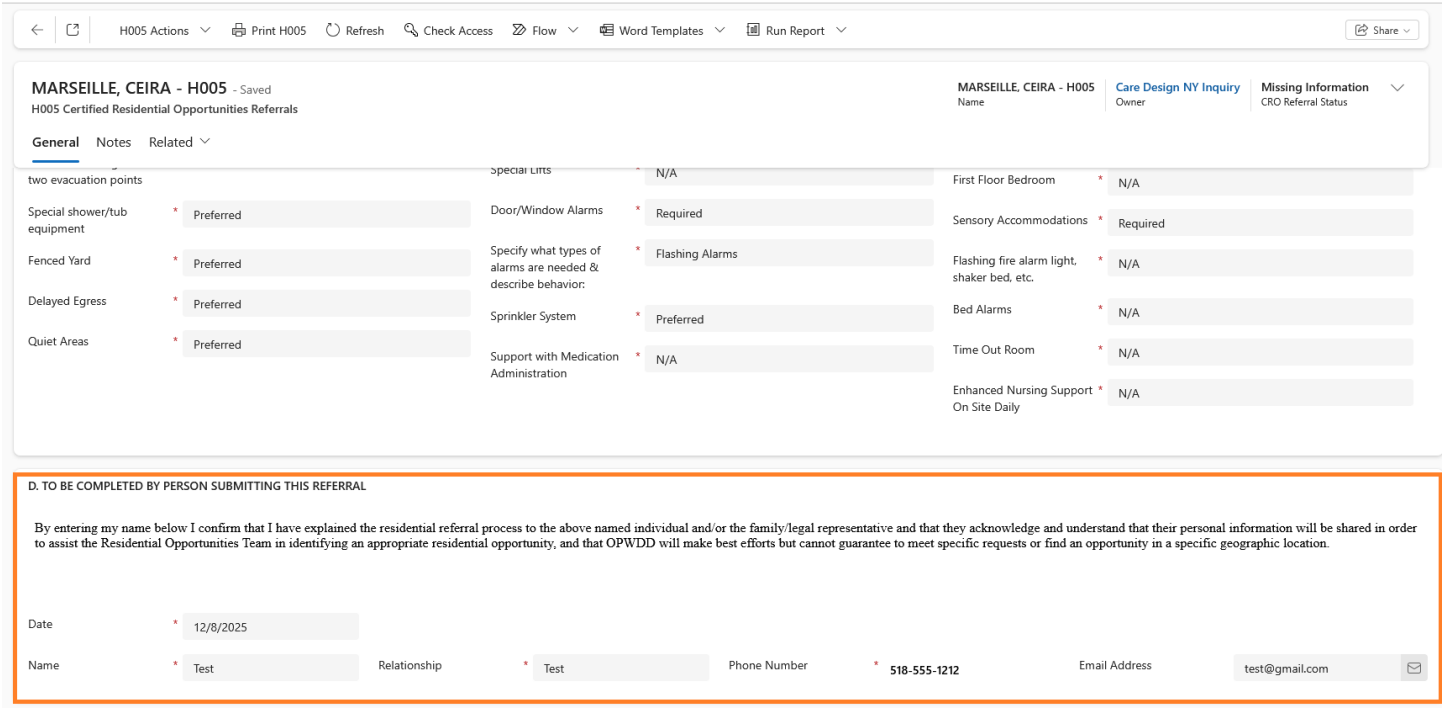


Updating and re-finalizing H005 CRO Referral

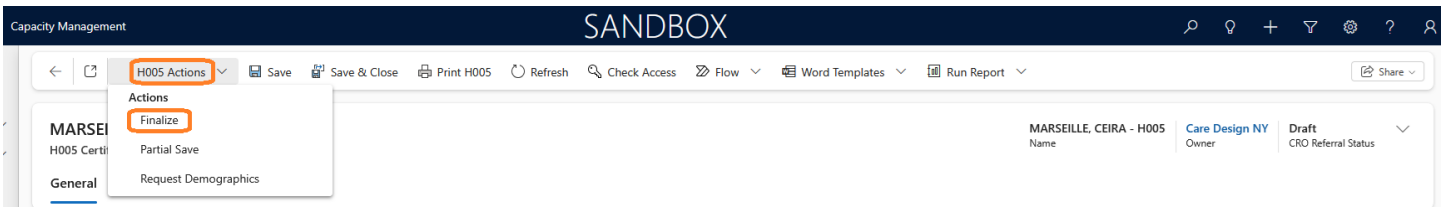
Click on H005.

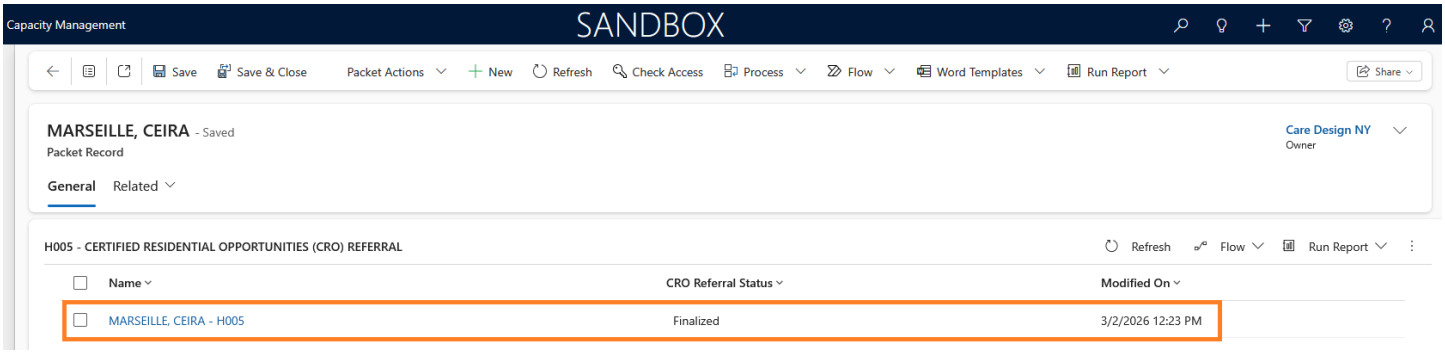


Review and update as per email notification. Section D of the H005 must be updated to reflect the new date submitted.



Once completed, the user must finalize the H005. Click “H005 Actions” from the menu and select “Finalize”.

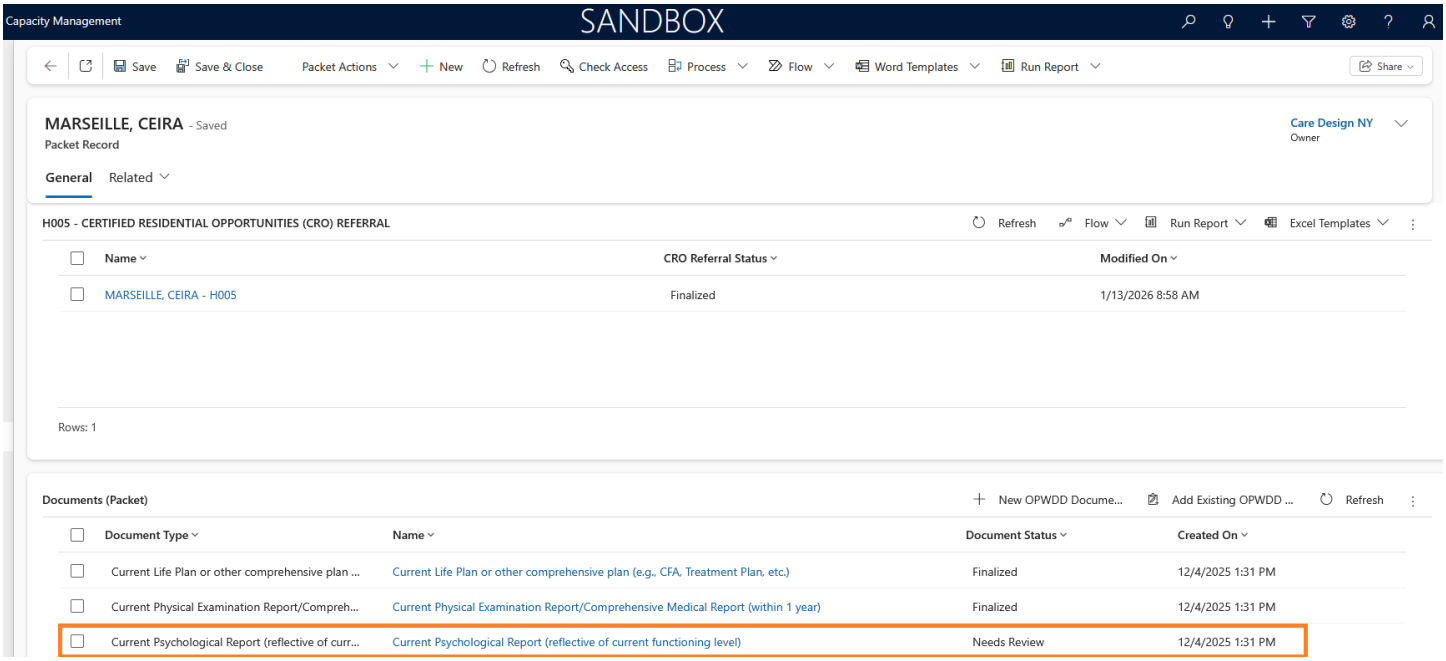




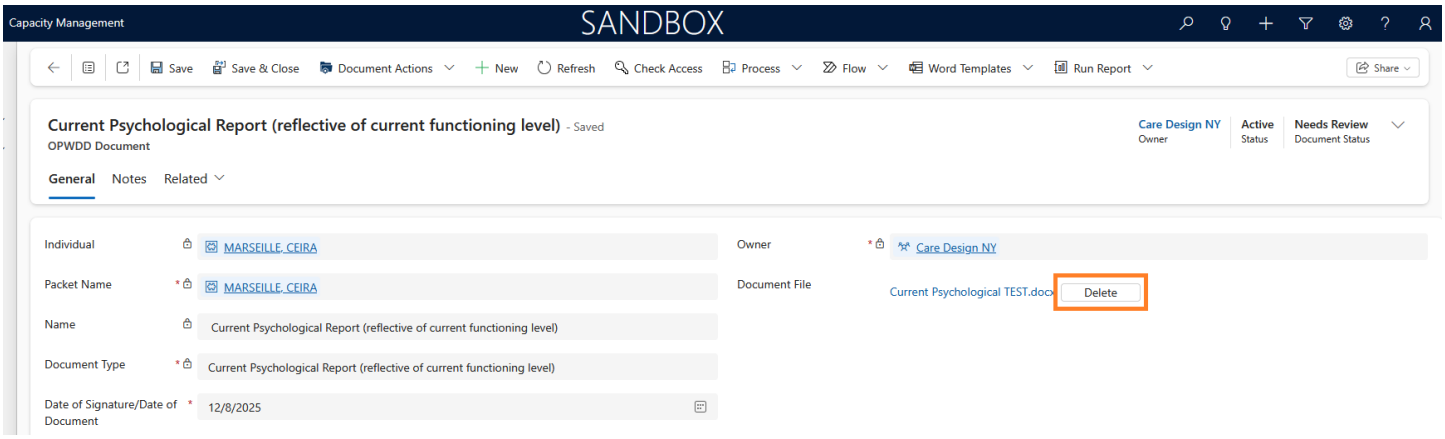
The H005 will now have a status of “Finalized”.

Updating and re-finalizing Documents

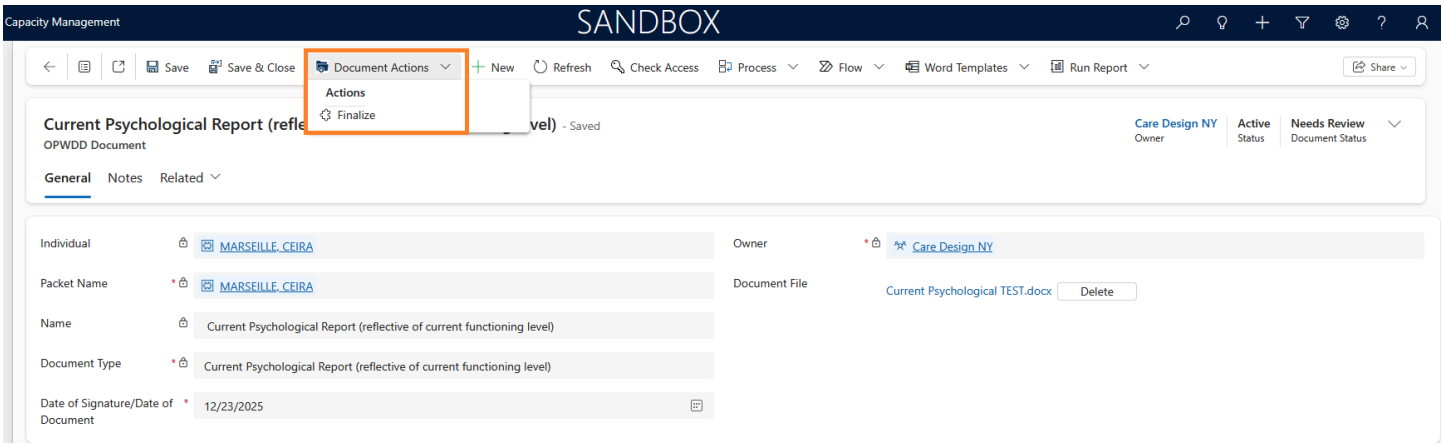
Click on the document showing anything other than “finalized” as the document status.



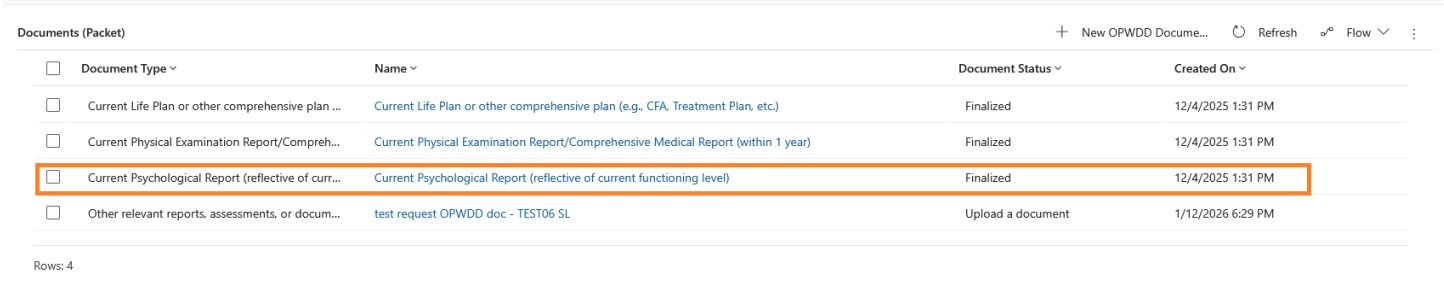
If the document needs to be replaced with an updated document, the user can use the delete function to remove the current document and then upload a new one.



Once the Document has been updated, the user will use the “Document Actions” menu option to “Finalize” once more.

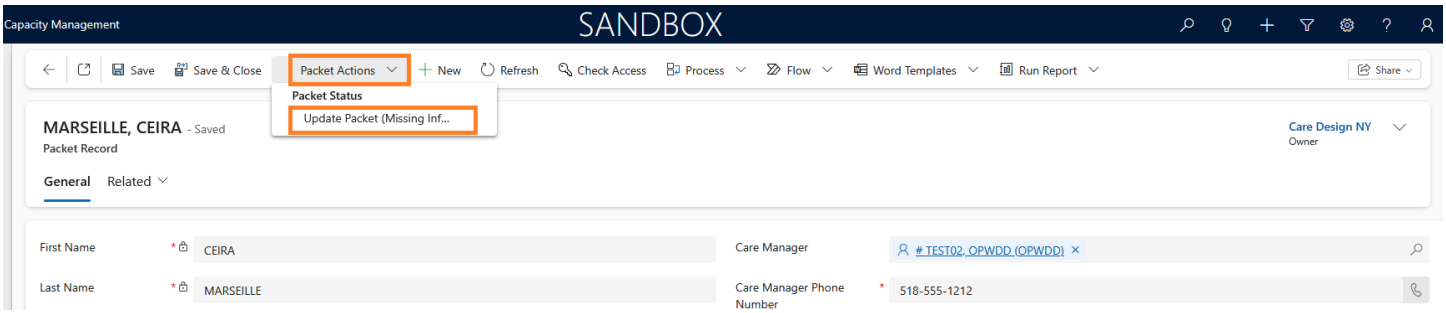


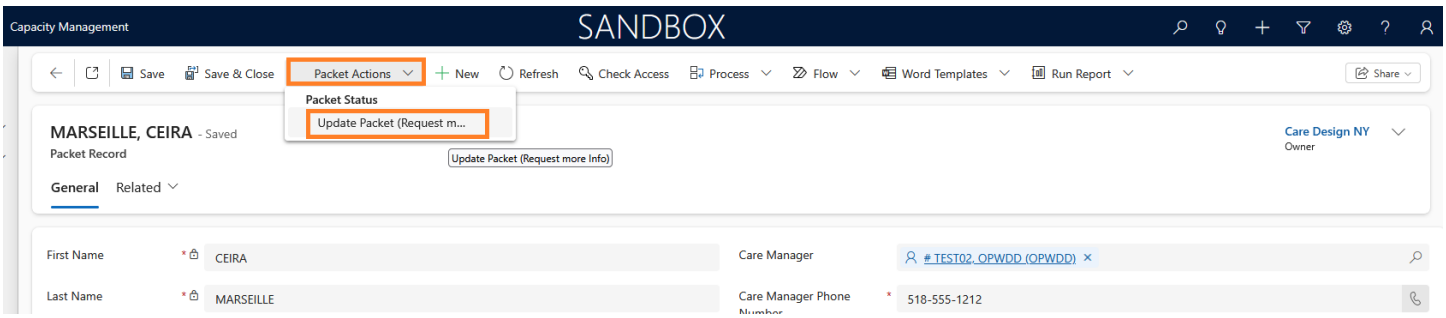
The updated document will now have a status of “Finalized”.



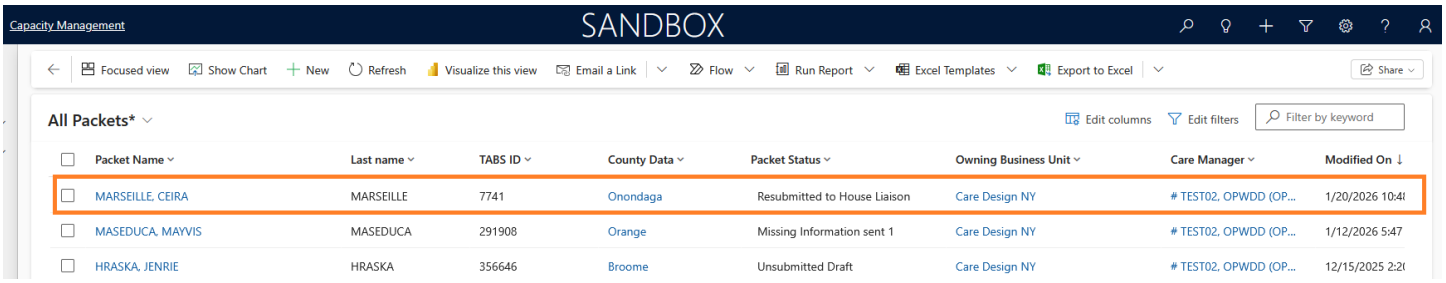
Packet Actions: Update Packet to Resubmit

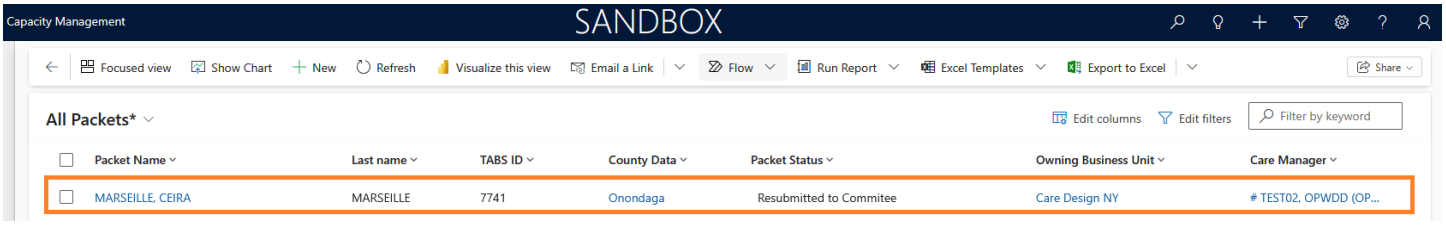
Once the Care Manager user has all containers “Finalized”, they can resubmit the packet. This will be performed using the “Packet Actions” menu option and selecting “Update Packet (Missing Information)” or “Update Packet (Request more info)”.





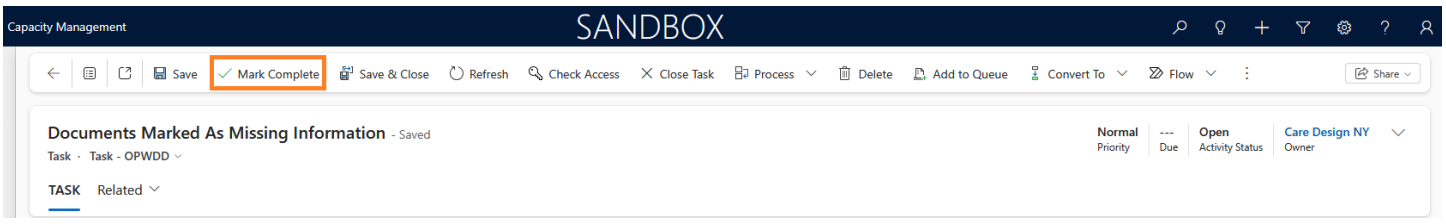
The packet status will be updated to “Resubmitted to Housing Liaison” or “Rebsubmitted to Committee” as appropriate.





Mark Complete Task Items

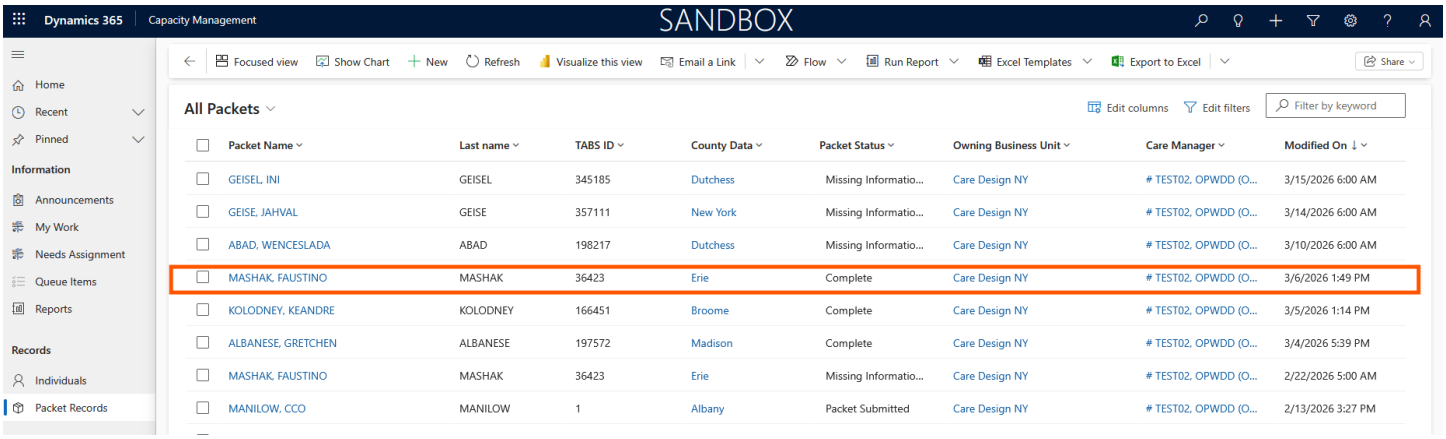
Return to the “My Work” Task item and choose “Mark Complete” from the top menu to remove from your “My Work” list.



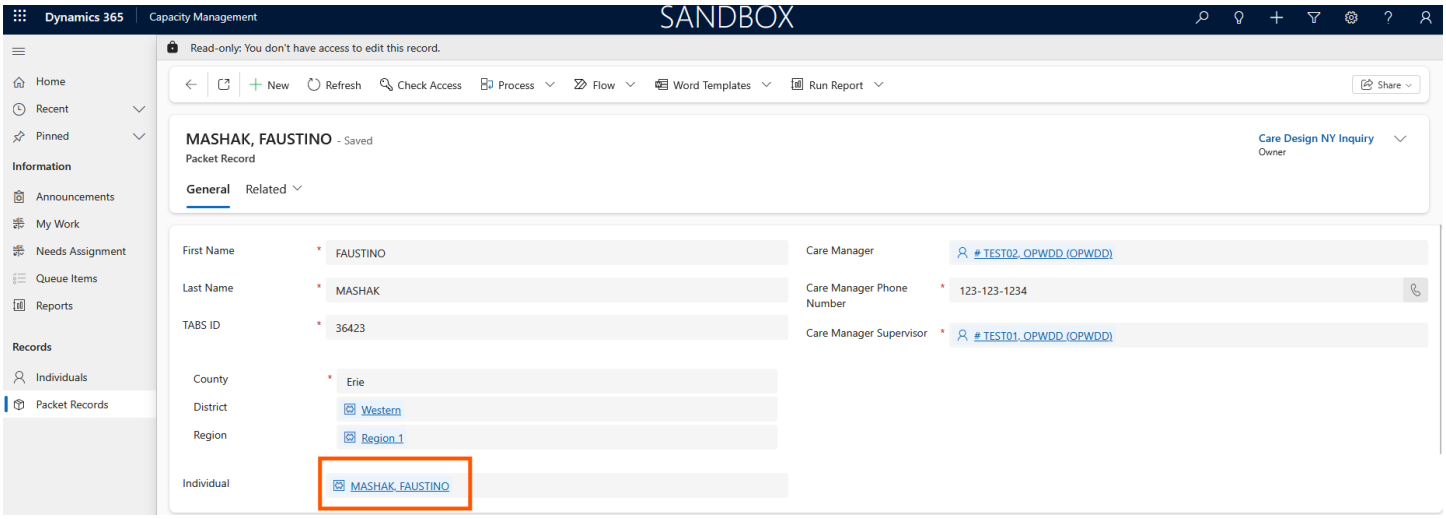
Completed Packets

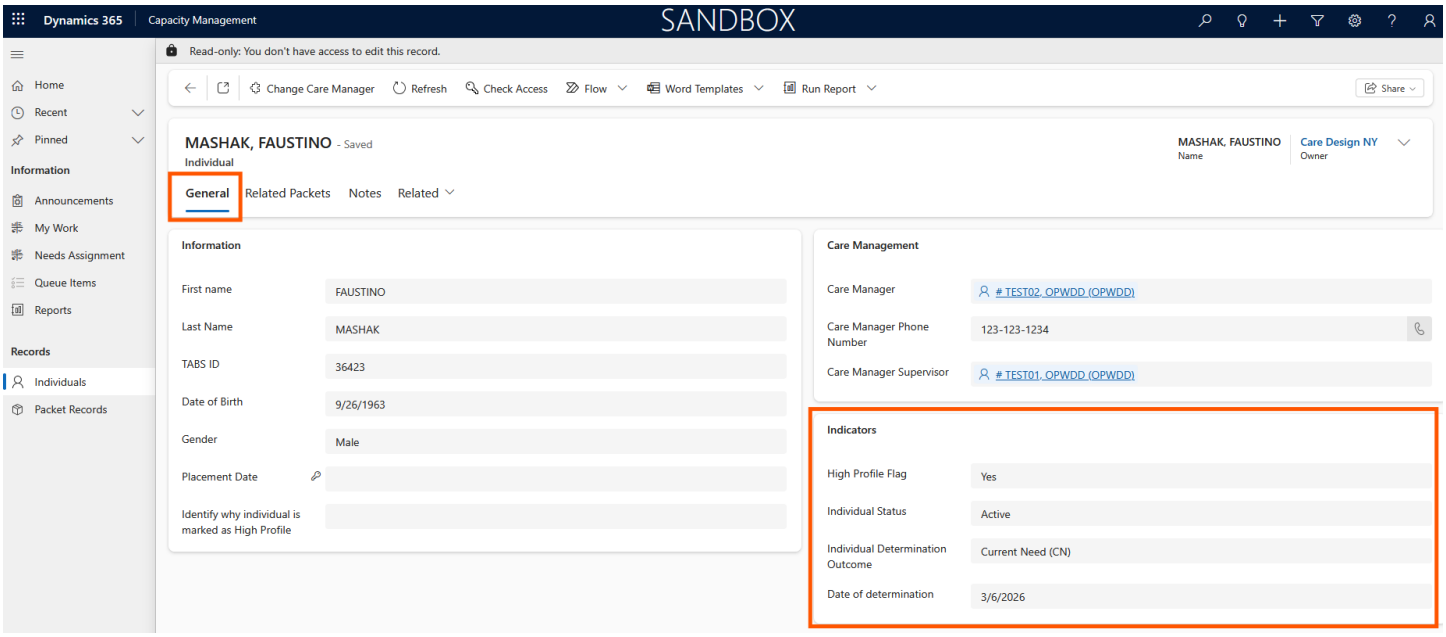
Care Managers will receive an NOD15 and/or H004 emailed to them when a packet is completed. This occurs outside of the system. Once added, the completed NOD15 and/or H004 will be found in the Packet Record on the General Tab under Documents.

To view the determination/designation information of a person once a packet is completed, navigate through either “Individuals” or “Packet Records”.



Click Person’s name.



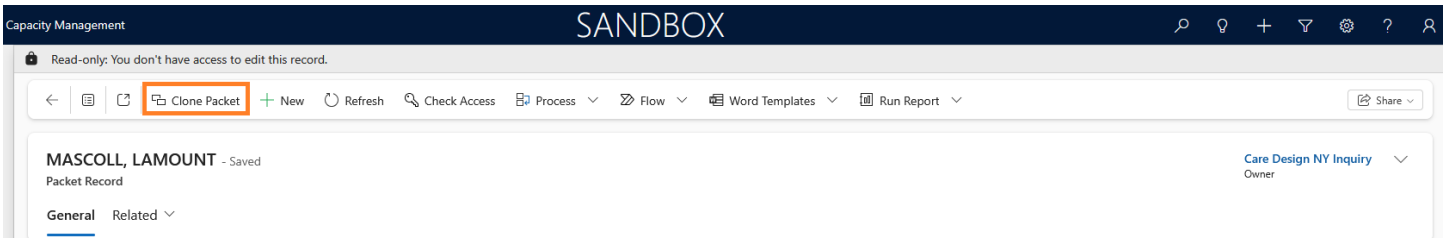


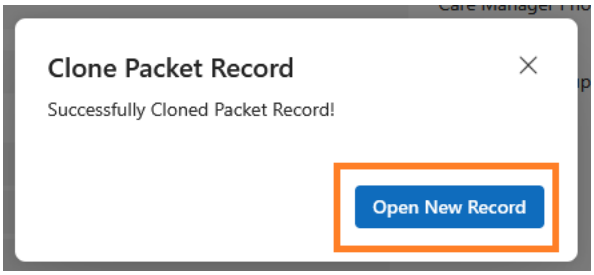
Clone Packet

The "Clone Packet" feature allows users to duplicate packets with a "Complete" packet status, provided the associated Individual Status is either "ACTIVE" or "INACTIVE." This functionality is also contingent on there being no in-flight/active packets.

To clone a packet, navigate to a completed packet and select "Clone Packet" from the toolbar menu.

A confirmation pop-up will appear, indicating successful cloning and providing a link to the newly created packet. The person who clones the packet will be listed as the owner of the new packet.

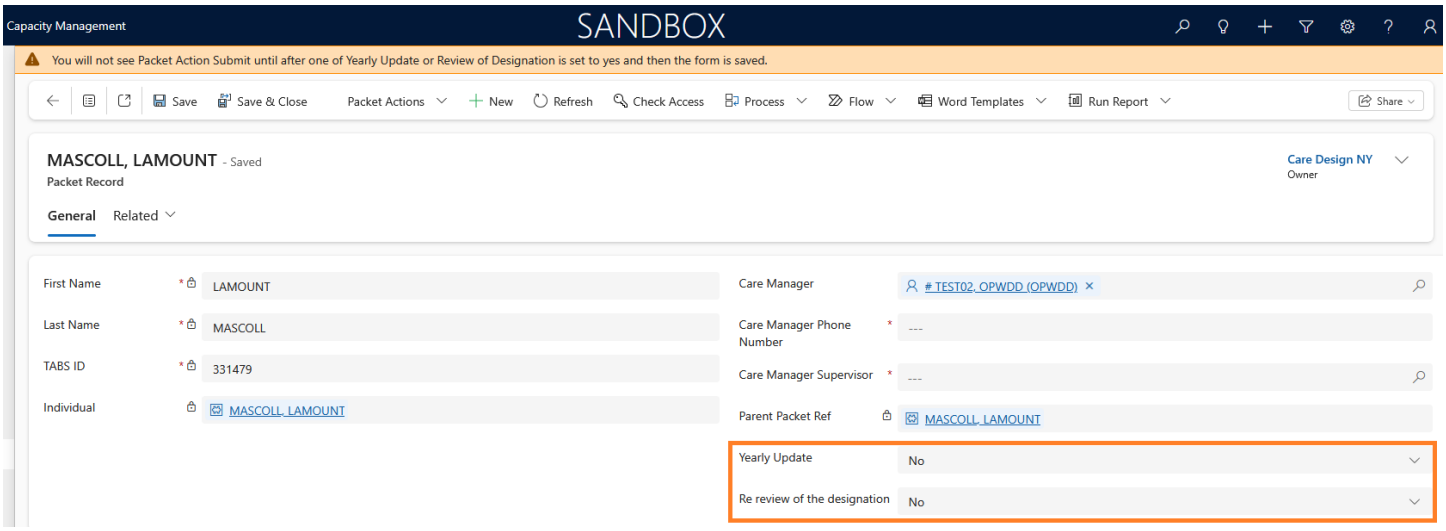




The cloned packet will closely resemble a new packet, with the exception of two additional fields in the general information section: "Yearly Update" and "Re-Review of the Designation." These fields are used to identify the

packet as a clone. The selection of "Yes" or "No" for these fields will directly influence how the cloned packet proceeds through the OPWDD review process upon submission.

The user must select “Yes” on either “Yearly Update” or “Re-Review of the Designation”. If “No” is selected for both, the following message will appear showing that Packet Action Submit is not available.



Upon cloning a packet, the H005 and document containers will generate similarly to a new packet. You may need to click the "Refresh" button on the toolbar to display these new containers, as they take a moment to populate after cloning.

The H005 will be pre-populated with most data from the original packet's H005, but not all. Since the H005 is in a draft state, you can edit these fields as necessary. Users should perform partial saves and finalize the H005 as usual.

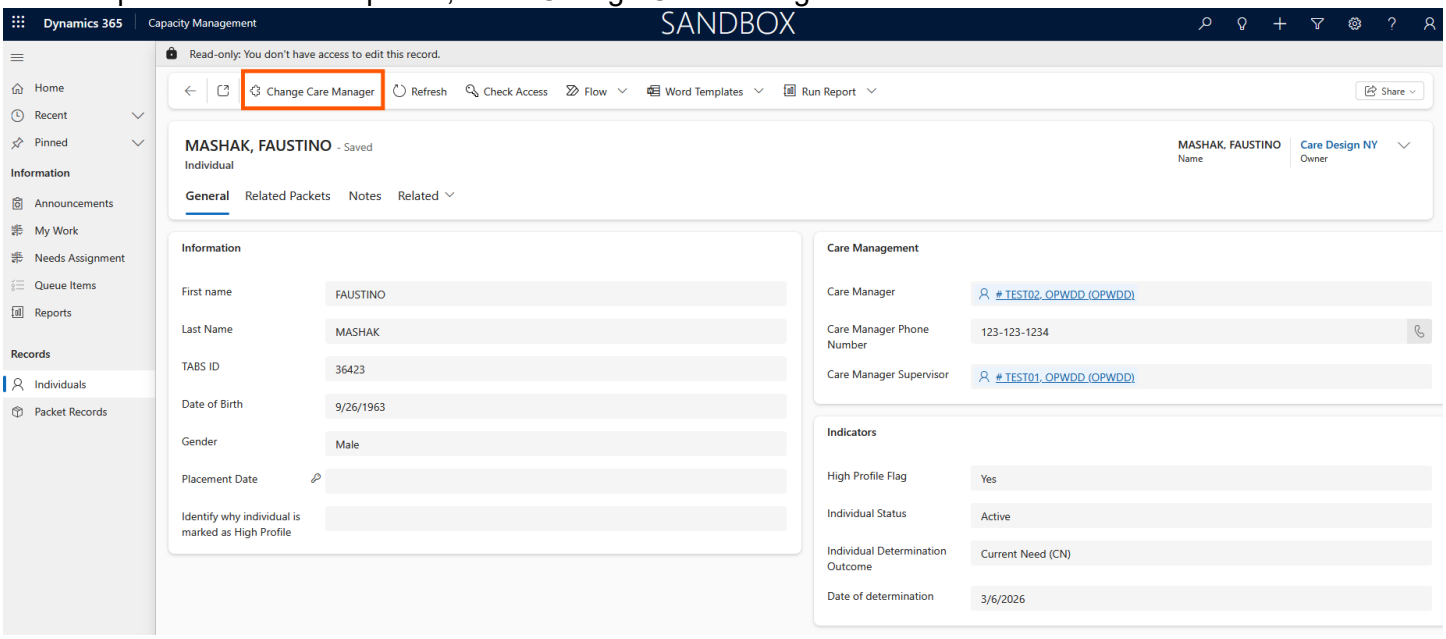
Please note that document containers and uploaded documents from the original packet will not carry over. Users will need to add and upload new documents as required.

For detailed instructions on completing a packet and its contents, please refer to the earlier sections of this guide.

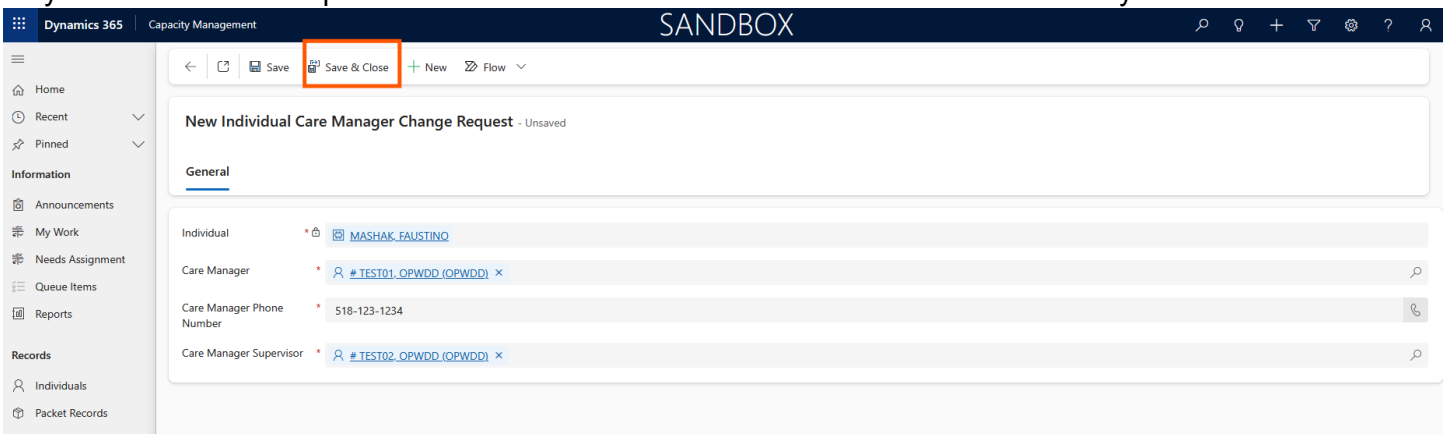
Change Care Manager

The system allows Care Managers to change a person's Care Manager / Care Manager Supervisor without directly editing a person's packet.

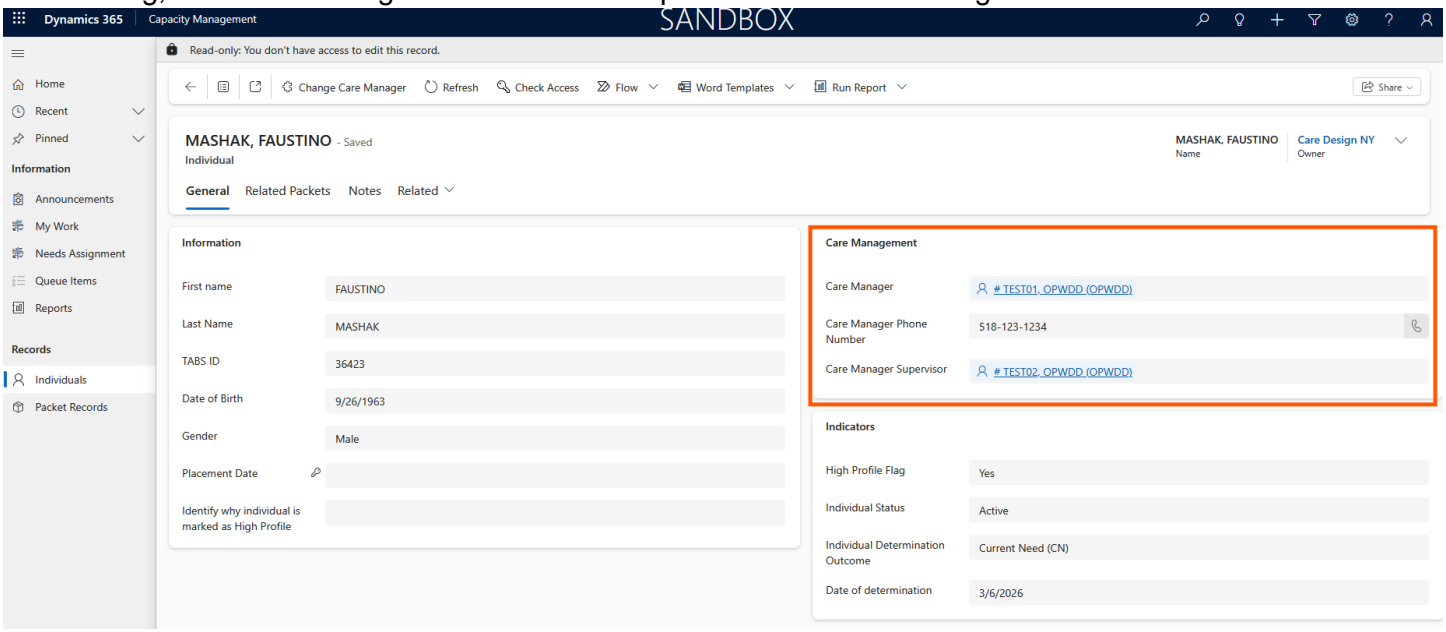
Within a person's individual profile, click "Change Care Manager" from the toolbar menu.



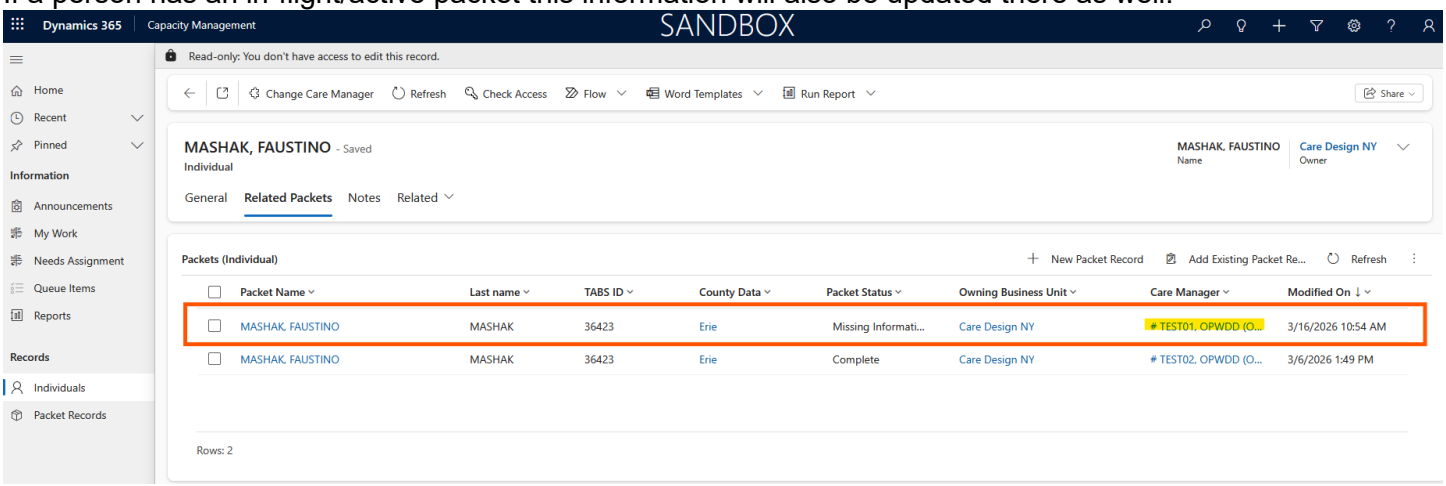
The available Care Managers and Care Manager Supervisors to select from are limited to the person's respective Business Unit (BU). Enter the changes. Select "Save" or "Save & Close". Please note the process may take some time to update. It is recommended to wait and then refresh if necessary.



After saving, the “Care Management” section will update to reflect the changes.



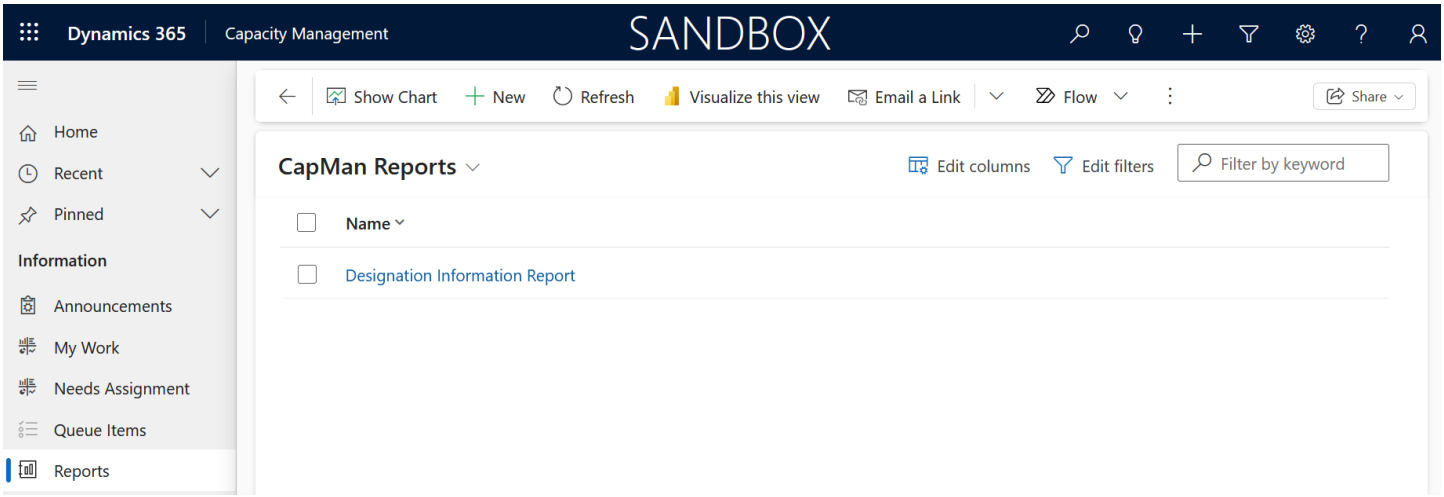
If a person has an in-flight/active packet this information will also be updated there as well.



Reports

There is currently one canned report available in CMA.

Navigate to the “Reports” group menu on the left pane.



Advanced Find

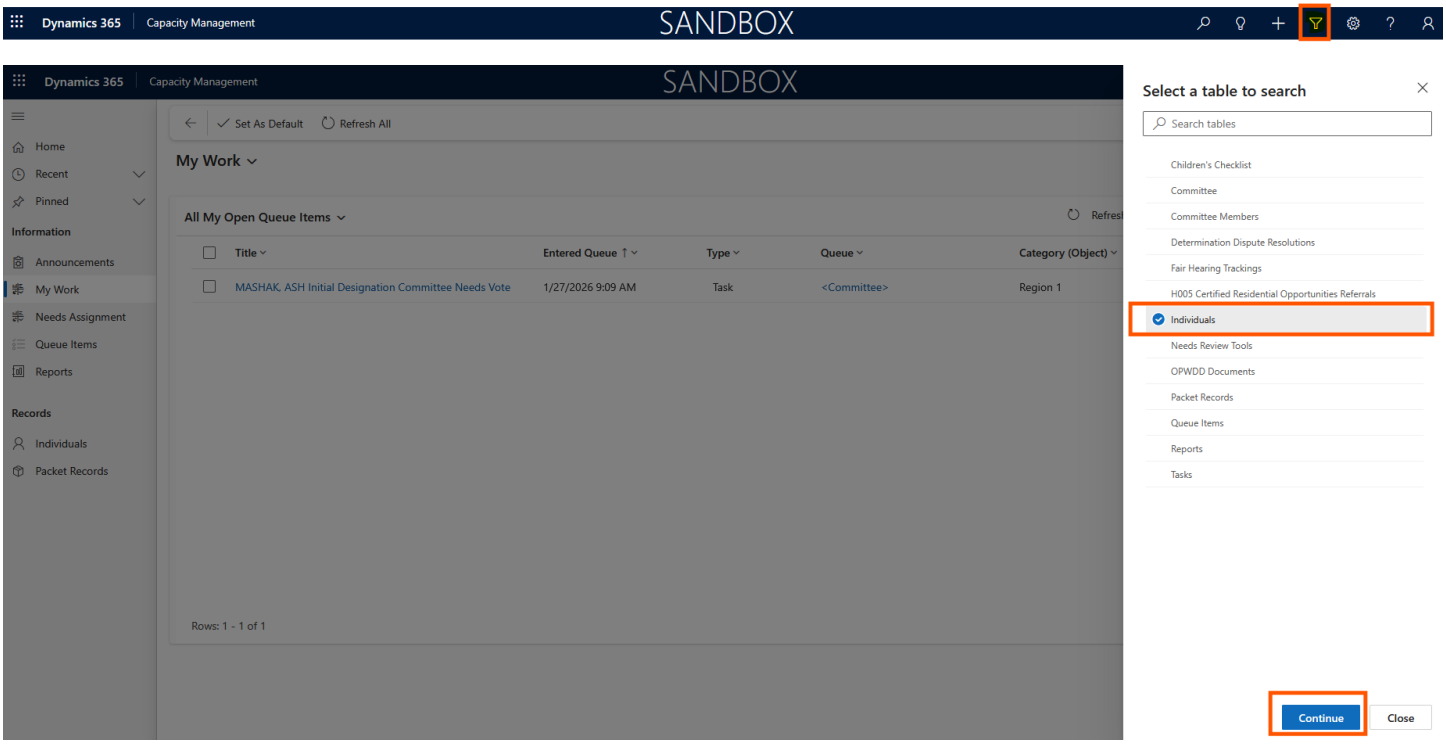
Advanced Find is CMA's built-in tool for creating custom filters and queries tailored to your specific needs.

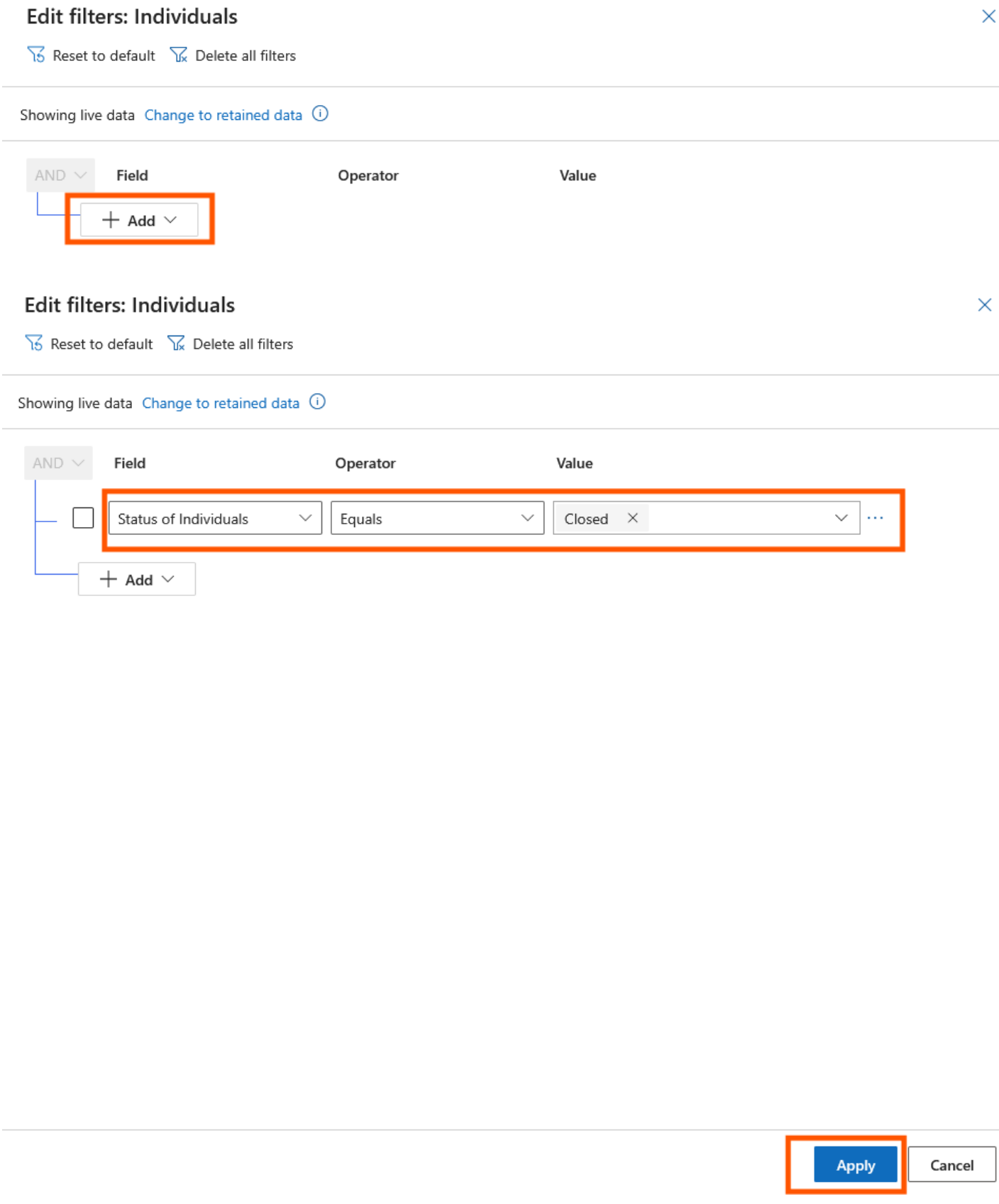
How to Use Advanced Find:

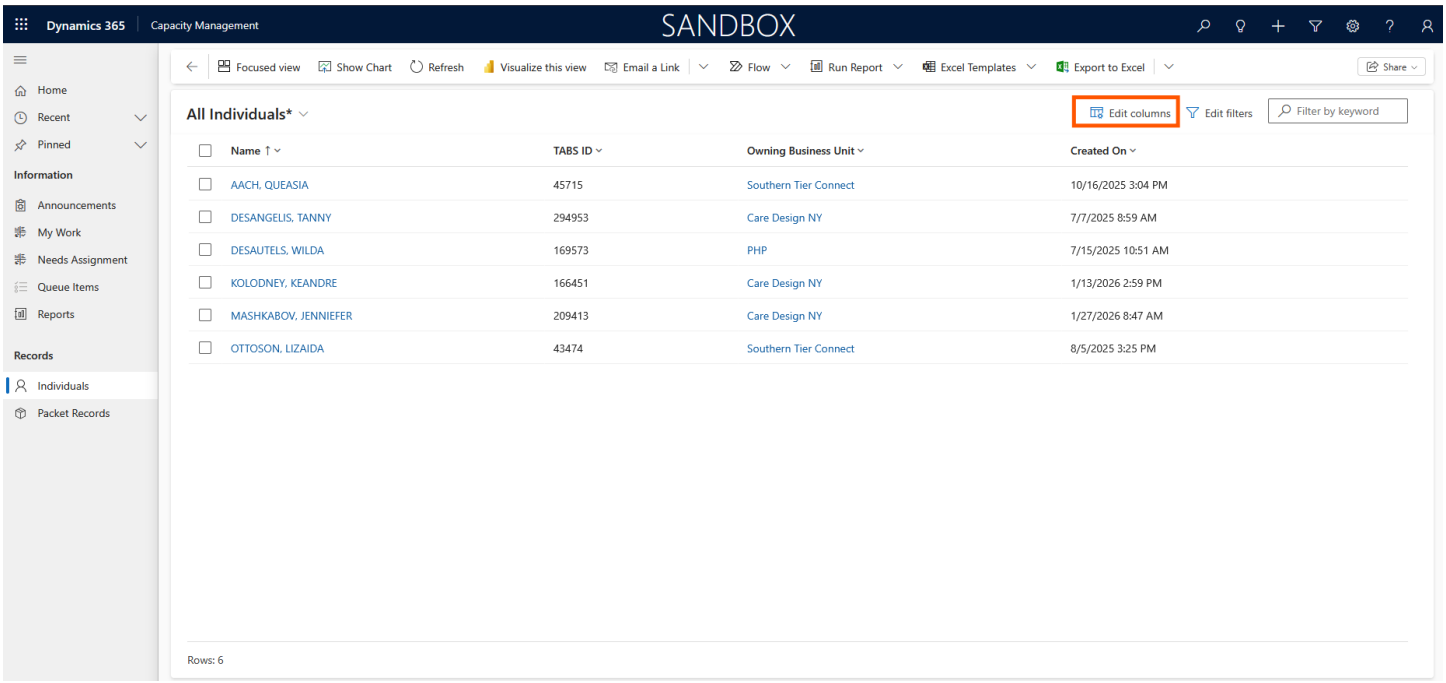
1. **Initiate Search:** Click the filter icon located in the top-right corner of the CMA system.
2. **Select Table:** Choose the specific table you wish to search within.
3. **Define Filters:** Navigate to "Edit Filters" to select relevant fields. Carefully select operators and Boolean logic to refine the criteria of your search.
4. **Confirm and Refine:** Confirm your query. You can always return to "Edit Filters" to adjust your search criteria.
5. **Customize View:** Use "Edit Columns" to personalize the display of your results. You can search for, add, remove, and rearrange columns for optimal viewing.

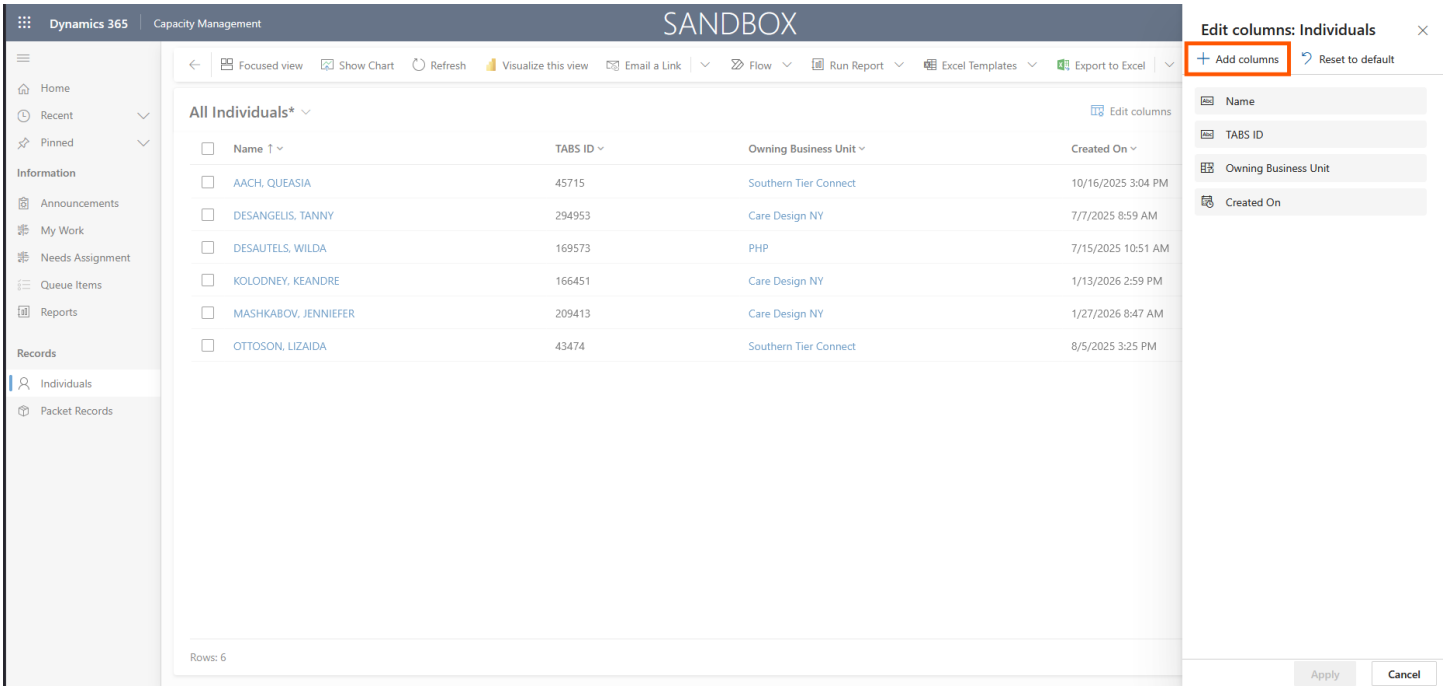
Important Note: Data within CMA is organized by its respective functionality/container. For instance, to find individuals with a "CLOSED" status, navigate to the "Individuals" table, then apply filters to the "Status of Individual" field using the "equal" operator and selecting "CLOSED." Subsequently, use "Edit Columns" to customize the presentation of your findings.

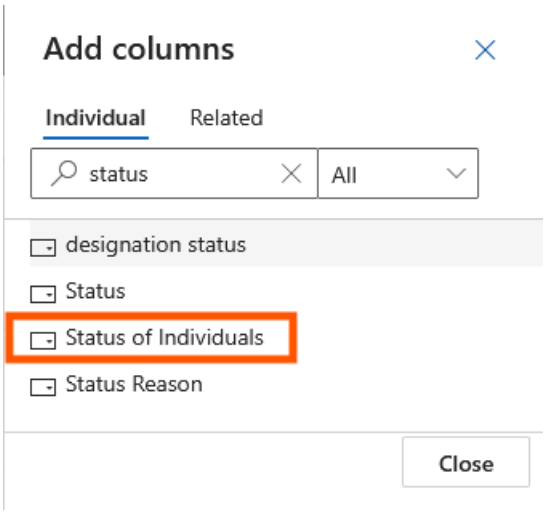
Care Managers will only have visibility of those individuals within their Owning Business Unit.

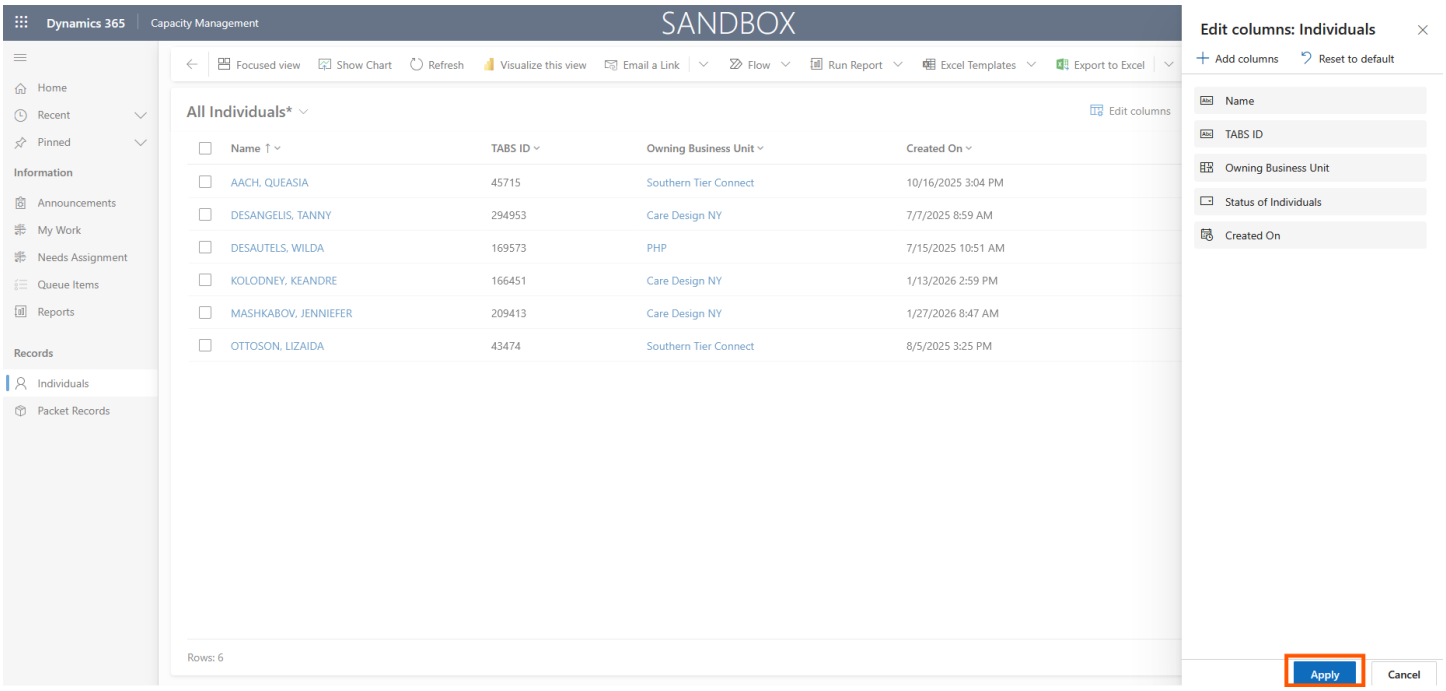



Edit filters: Individuals
Reset to default
Delete all filters
Showing live data
Change to retained data
AND
Field
Operator
Value
Add
Edit filters: Individuals
Reset to default
Delete all filters
Showing live data
Change to retained data
AND
Field
Operator
Value
Status of Individuals
Equals
Closed
Add
Apply
Cancel


Dynamics 365
Capacity Management
SANDBOX
Home
Recent
Pinned
Information
Announcements
My Work
Needs Assignment
Queue Items
Reports
Records
Individuals
Packet Records
Focused view
Show Chart
Refresh
Visualize this view
Email a Link
Flow
Run Report
Excel Templates
Export to Excel
Share
All Individuals*
Edit columns
Edit filters
Filter by keyword
Name
TABS ID
Owning Business Unit
Created On
AACH, QUEASIA 45715 Southern Tier Connect 10/16/2025 3:04 PM
DESANGELIS, TANNY 294953 Care Design NY 7/7/2025 8:59 AM
DESAUTELS, WILDA 169573 PHP 7/15/2025 10:51 AM
KOLODNEY, KEANDRE 166451 Care Design NY 1/13/2026 2:59 PM
MASHKABOV, JENNIEFER 209413 Care Design NY 1/27/2026 8:47 AM
OTTOSON, LIZAIDA 43474 Southern Tier Connect 8/5/2025 3:25 PM
Rows: 6


Dynamics 365
Capacity Management
SANDBOX
Edit columns: Individuals
Add columns
Reset to default
Name
TABS ID
Owning Business Unit
Created On
Apply
Cancel
All Individuals*
Rows: 6


Add columns
Individual
Related
status
All
designation status
Status
Status of Individuals
Status Reason
Close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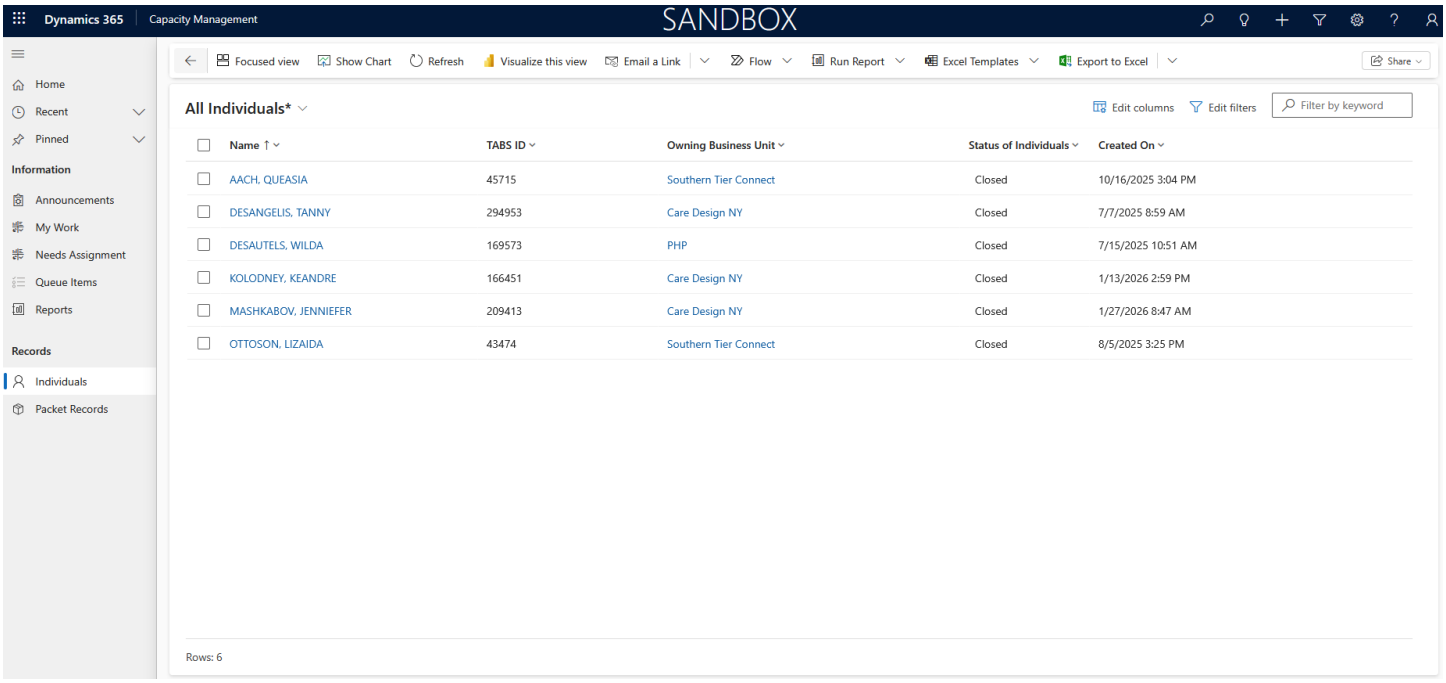
OTTOSON, LIZAIDA 43474 Southern Tier Connect 8/5/2025 3:25 PM
Rows: 6
Edit columns: Individuals
Add columns
Reset to default
Name
TABS ID
Owning Business Unit
Status of Individuals
Created On
Apply
Cancel



Users can export the report by clicking the “Export to Excel” menu option.