Office for People With Developmental Disabilities

CCO2 Disenrollment & Transfer Form

CCO User Guide

CCO2 Disenrollment/Transfer 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 disenroll or transfer a person currently being served by its organization.

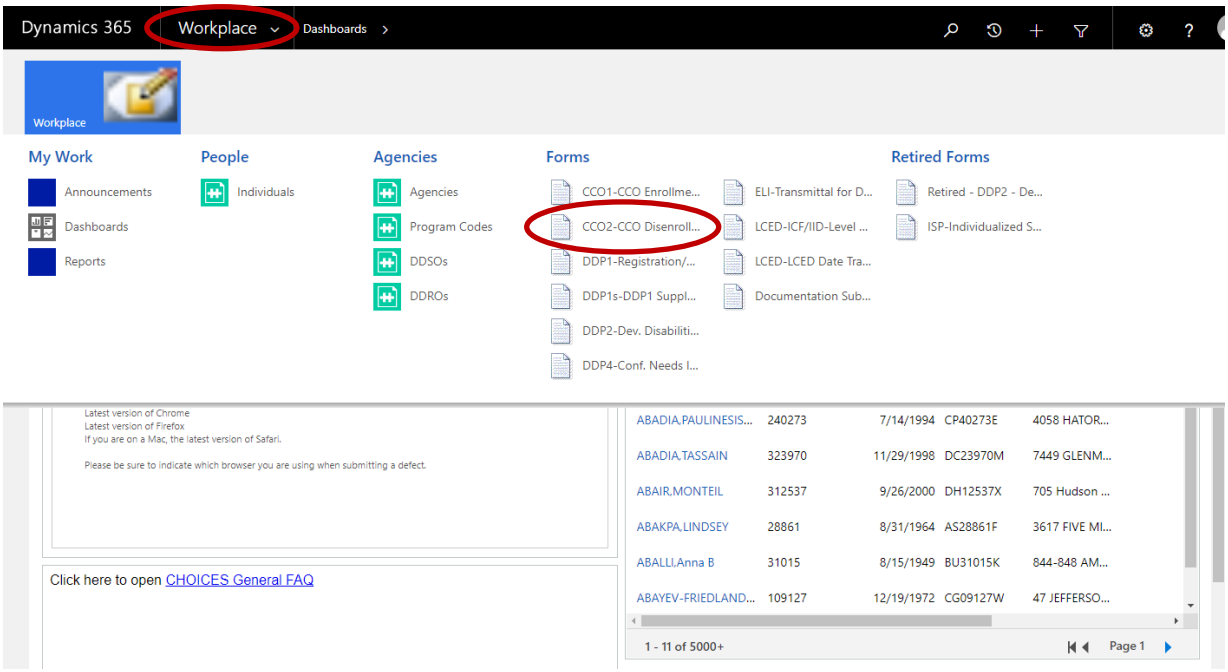
The *Transfer* option is for any movement within the same CCO, even to another DDSO program within that CCO.

Disenrollment is to remove the person from the CCO. Currently there are nine disenrollment reasons, of which two will need to be submitted to the DDRO for processing. The other reasons will not have any DDRO involvement and directly file to TABS.

The CHOICES roles that 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

CCO2 Enrollment Form Section

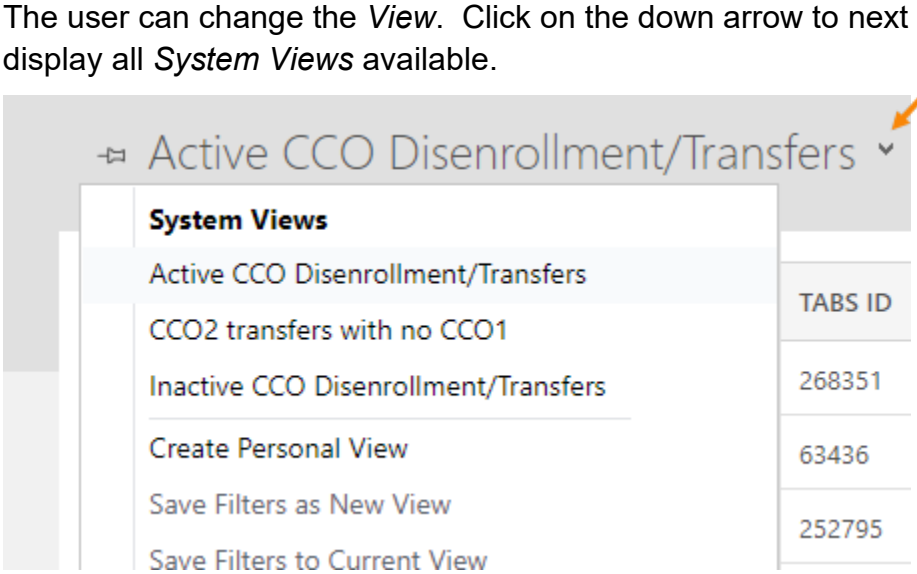
From the main CHOICES Screen, click, **Workplace**, to display the sub-sections of CHOICES. Then click **CCO2-CCO Disenroll**…



Views and Sorting

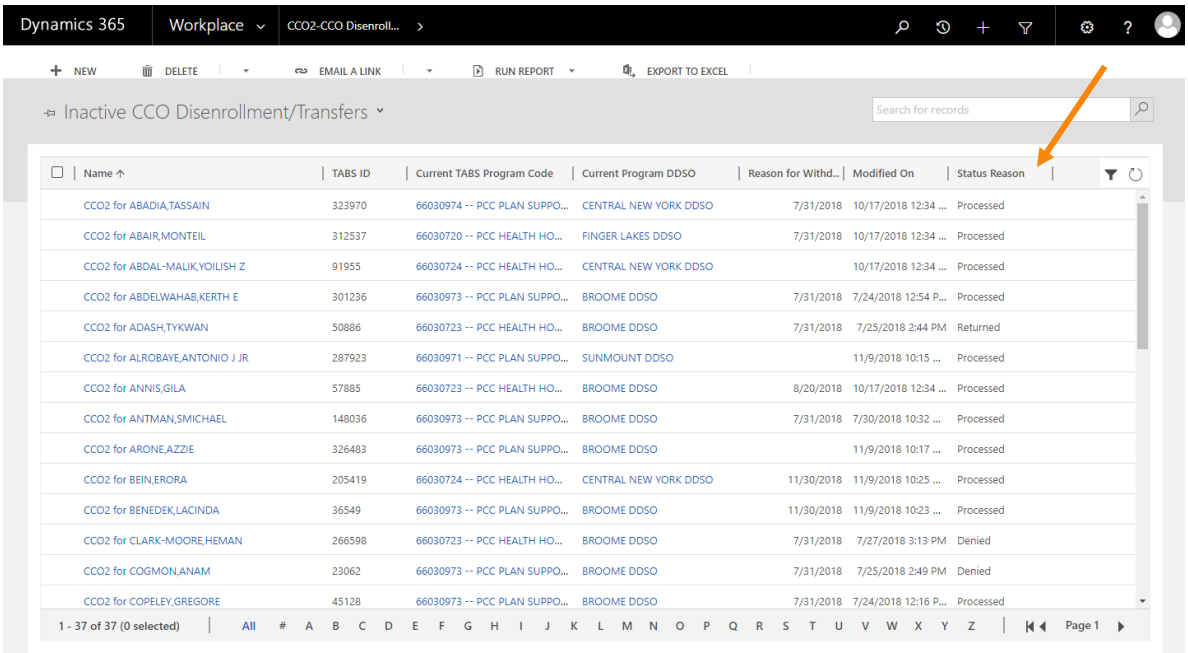
The default view is to the “Active” list. Within this list, both, Saved and Submitted, forms will display.

The user can change the *View*. Click on the down arrow to next to the current view to display all *System Views* available.



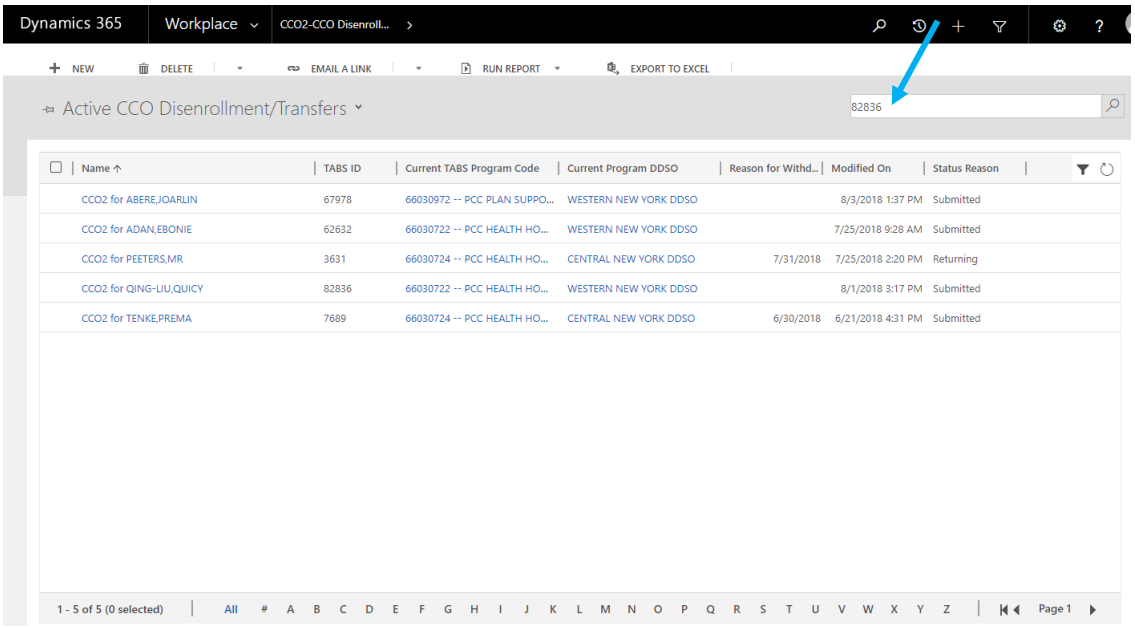
By clicking on the, *Inactive CCO,* the list displays all inactive forms. See “Form Statuses” Section on the meanings of Active and Inactive.

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

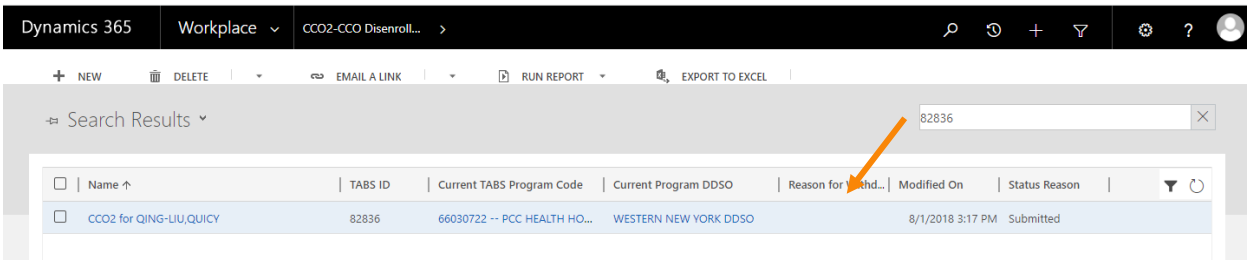


To Search for a Specific Individual

Within the CCO2 sub-section, only the Active list, has search capabilities. Enter either the person's name or 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.



You can then edit a CCO2 form that has not been submitted.

Form Statuses

All forms in CHOICES have 2 types of statuses, *Active or Inactive* and then the *form status,* noted as *Status Reason*.

Active statuses for the CCO2 form are:

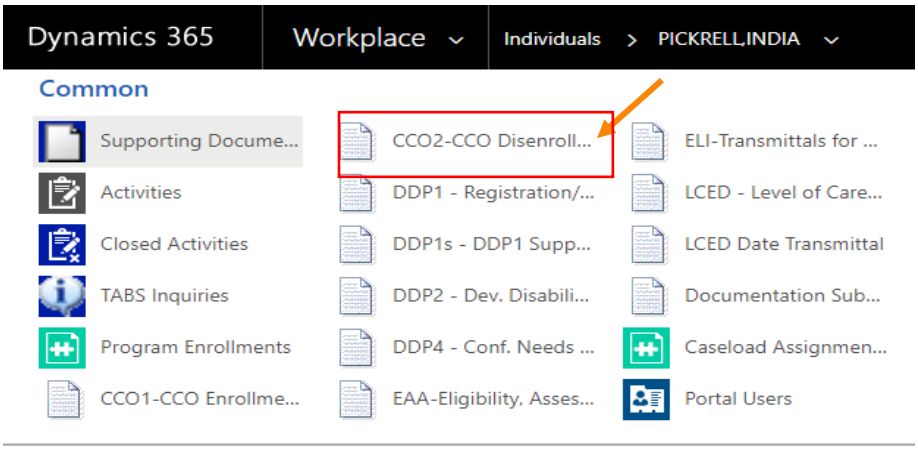
1. Saved – A saved form can be opened, edited and then saved or submitted.
2. Submitted – A submitted form has been queued to the DDRO. The form cannot be edited by the CCO user.
3. Returning – The DDRO is returning the form and until the return process is completed, the form may display as, Active, Returning.

Inactive statuses for the CCO2 form are:

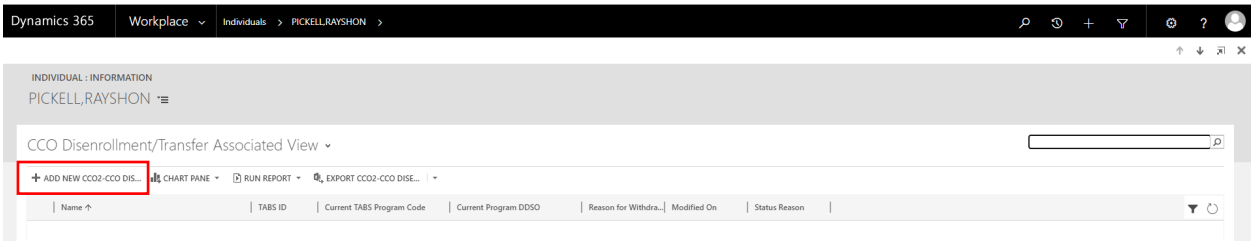
1. Processed – this form has been submitted and filed to TABS.
2. Returned – the DDRO has returned the form and a note as to why will be included
3. Denied – the DDRO is denying the request.

How to Create and Submit the Form

Go to the Individuals section to locate the person's record. Search for and then open the person's record, click on the arrow next to the person's name and then click on **CCO2-CCO Disenroll**....



At the person's record go to the **CCO2 CCO Disenrollment/Transfer** sub-section, click on the "+ Add New CCO2…"



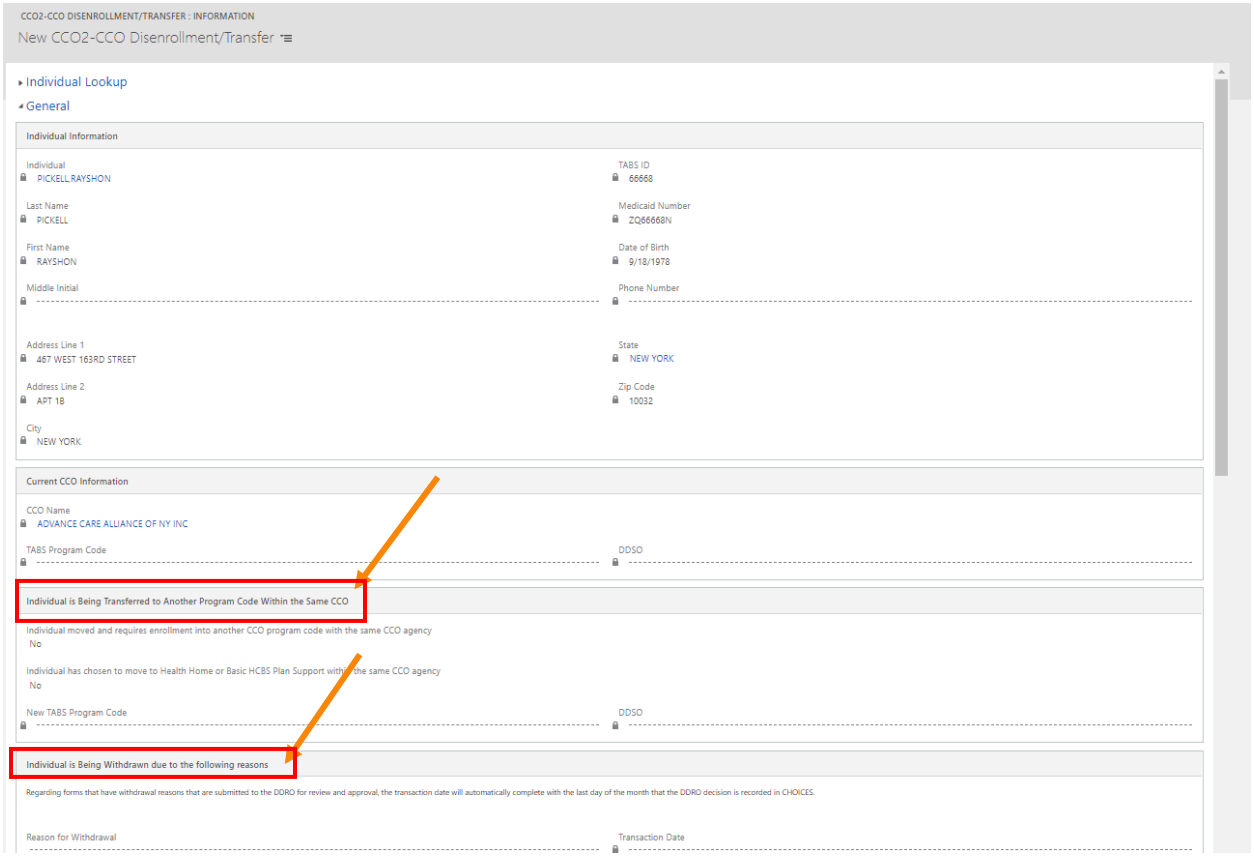
The form will load with the person's demographic and the Agency (CCO)'s information.

No fields will initially display as required.

Only when the user selects an option in either the Transfer or Withdrawn section, will any fields that are required for that specific option display with the red asterisk.

All required fields must be completed prior to saving or submitting the form.

Any field with a lock is not available to the user to complete.



Transfer Options

The transfer section has two options.

1. *Individual moved and requires enrollment into another CCO program code with the same CCO agency*.

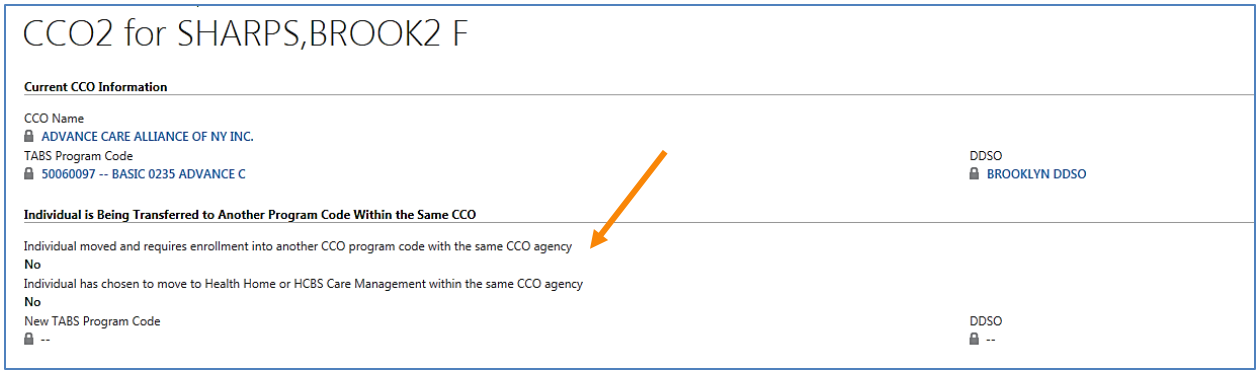
   This option is only for a person who has moved outside of the catchment area for the current program code. Each CCO program code is affiliated with a specific DDSO and the DDSO is affiliated with specific counties. Therefore, the person must reside in a county served by the program code.

   Example: Brook lives in Warren County and the current program is affiliated with Capital District DDSO. But then Brook moves to Rockland County. Brook's current CCO serves both counties so the CCO can transfer Brook to the appropriate program code (Health Home or Basic HCBS Plan Support) in the new DDSO, Hudson Valley.

2. *Individual has chosen to move to Health Home or Basic HCBS Plan Support.*

   This option is to change the program type for the person. The person would be moving from their current Health Homes program code to Basis HCBS Plan Support (or vice a versa) in the same CCO in the same DDSO.

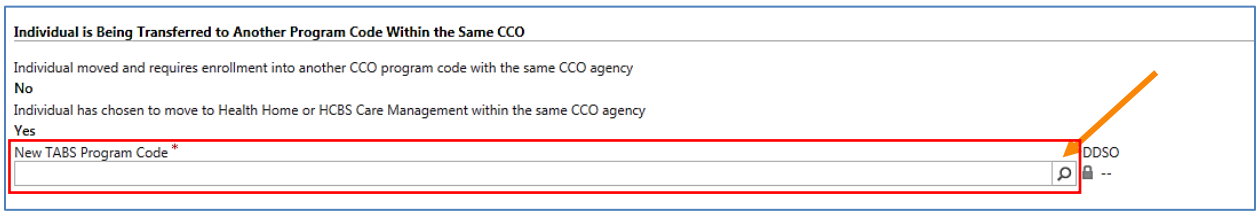
   The user must choose which is the appropriate option by changing the "No" to a "Yes".



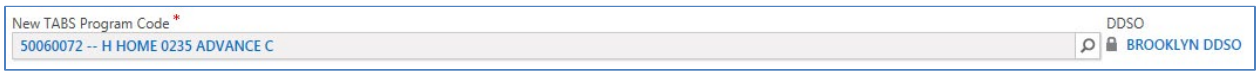
Note: There could be a scenario where a person is physically moving and at the same time is changing their program type, so both options can be marked as "Yes".

Reminder: if a person is moving please complete a DDP1, Demographic Change for the new address.

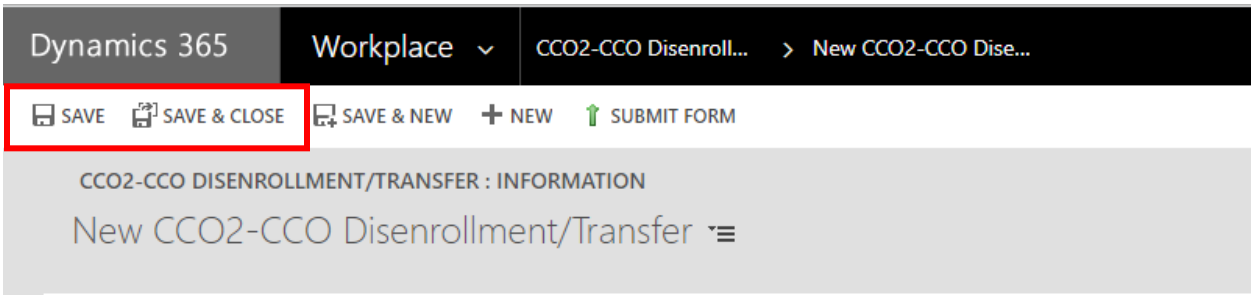
Then, the *TABS Program Code* field displays with the Look Up icon at the end. Click the icon to display the CCO's list of program codes to make a selection.



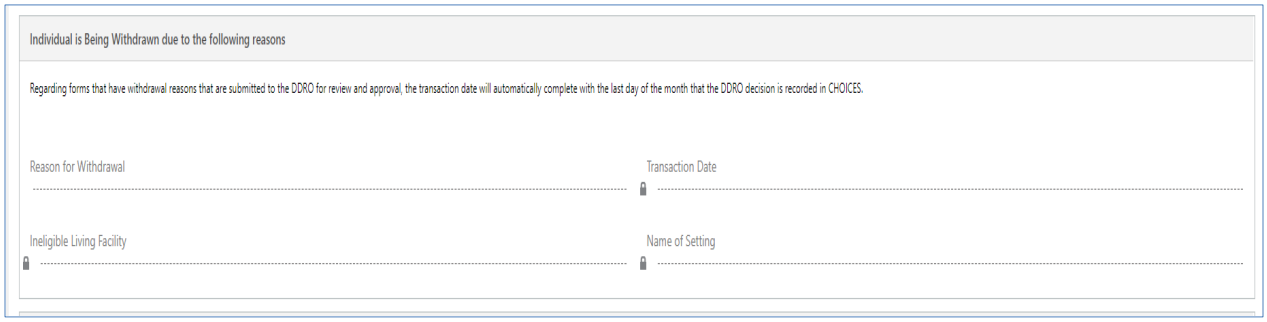
Once the TABS Program Code is selected the corresponding DDSO will automatically complete.



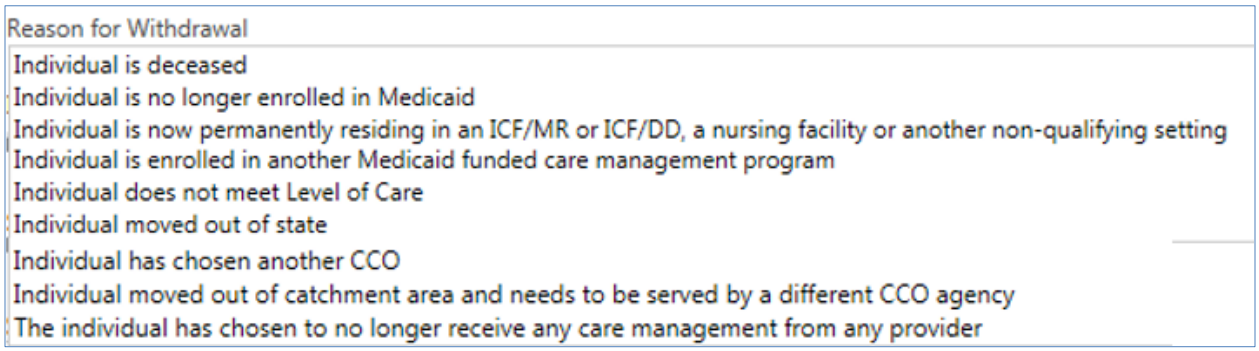
If necessary, the user can “Save” or “Save & Close” the form and return later to submit.



Individual is Being Withdrawn from CCO services



Currently there are nine reasons for a person to be withdrawn from a CCO.



Withdrawal Reasons and Functionality

Depending on the reason for the withdrawal, different fields will be required and different functionality will occur in filing the withdrawal date.

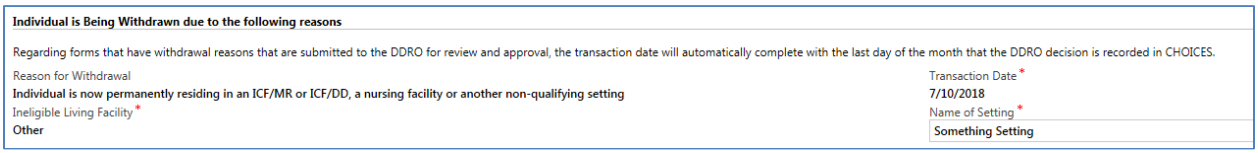
For the following two reasons, the form will be submitted to the DDRO for approval and processing. The Transaction Date field will not be available to the user but will auto-complete for the last day of the month that the DDRO approves the withdrawal.

- Individual does not meet Level of Care
- The individual has chosen to no longer receive any care management form any provider

For the following three reasons, a transaction date will be necessary and the *Transaction Date* field will be enabled and required. The removal date from the CCO will be the transaction date completed on the form. The form will file that date directly to TABS for processing.

- Individual is deceased.
- Individual is no longer enrolled in Medicaid
- Individual is now permanently residing in an ICF/MR or ICF/DD, a nursing facility or another non-qualifying setting

And for "Individual is now permanently residing in an ICF/MR or ICF/DD, a nursing facility or another non-qualifying setting," the user must complete the, *Ineligible Living Facility*, field. If "Other" is chosen for the new living facility, the user must type in the setting.



For the following four reasons, the *Transaction Date* field will auto complete with the last day of the month that the form is being completed or submitted.

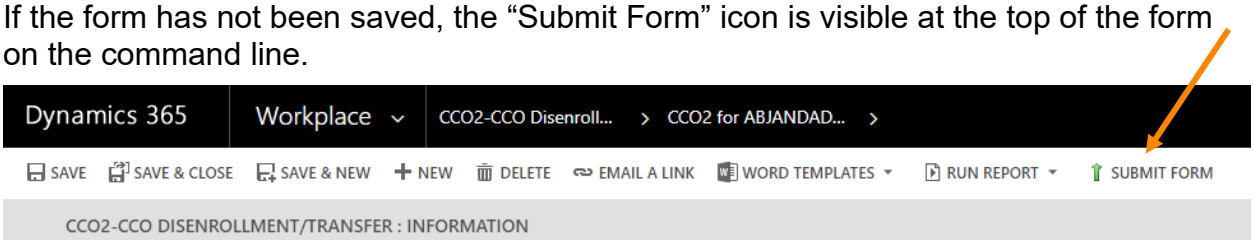
If the form is completed but then saved and not submitted till the following month, which could be only one day, the Transaction Date field will change to that current month's last day.

Therefore, the removal date from the CCO will depend on the transaction date. The forms will file directly to TABS for processing and pend till the last day of the month.

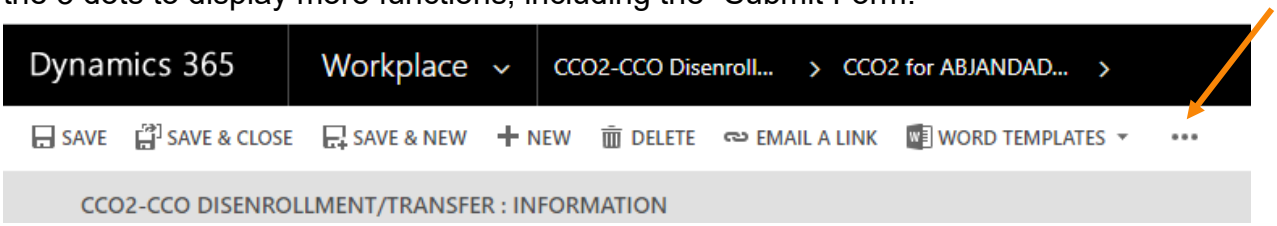
- Individual is enrolled in another Medicaid funded care management program
- Individual moved out of state
- Individual has chosen another CCO
- Individual moved out of catchment area and needs to be served by a different CCO agency

How to Submit the Form

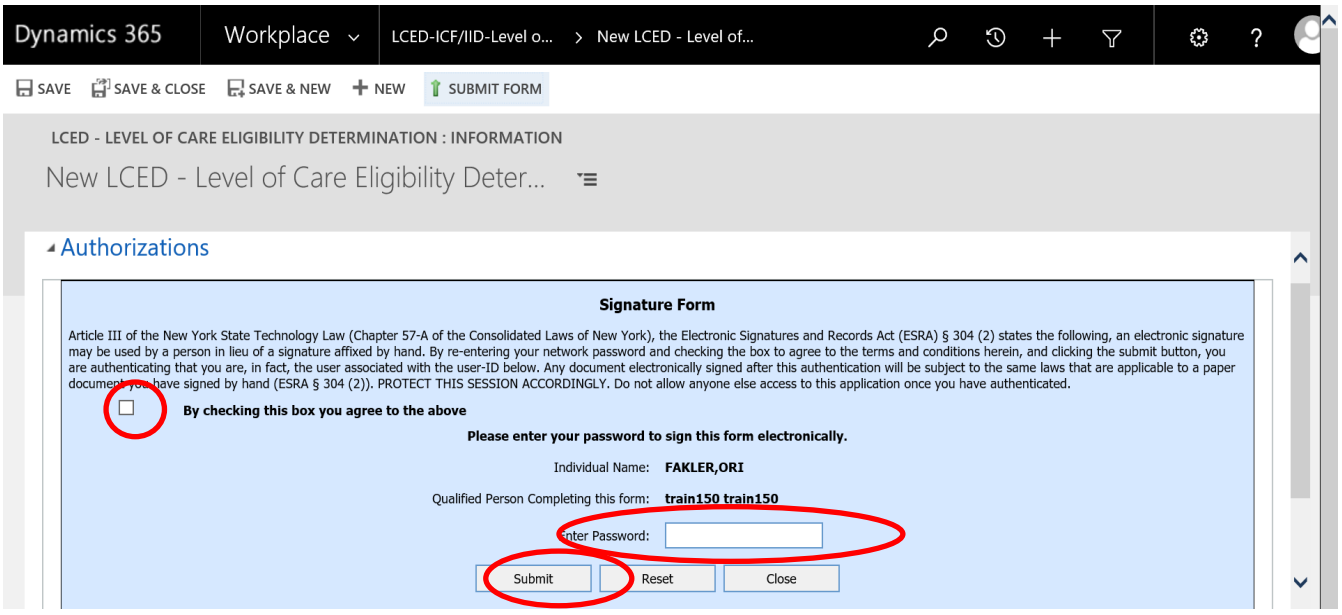
If the form has not been saved, the “Submit Form” icon is visible at the top of the form on the command line.



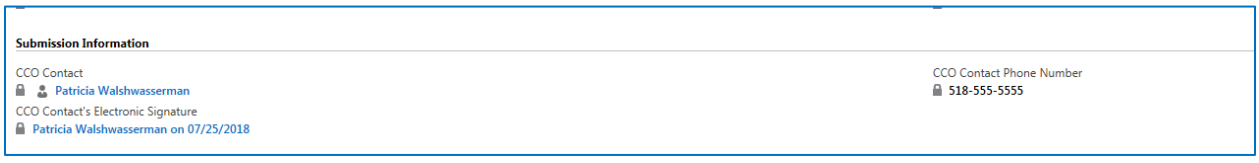
If the form had been saved before needing to submit, then, at the top of the form, click the 3 dots to display more functions, including the “Submit Form.”



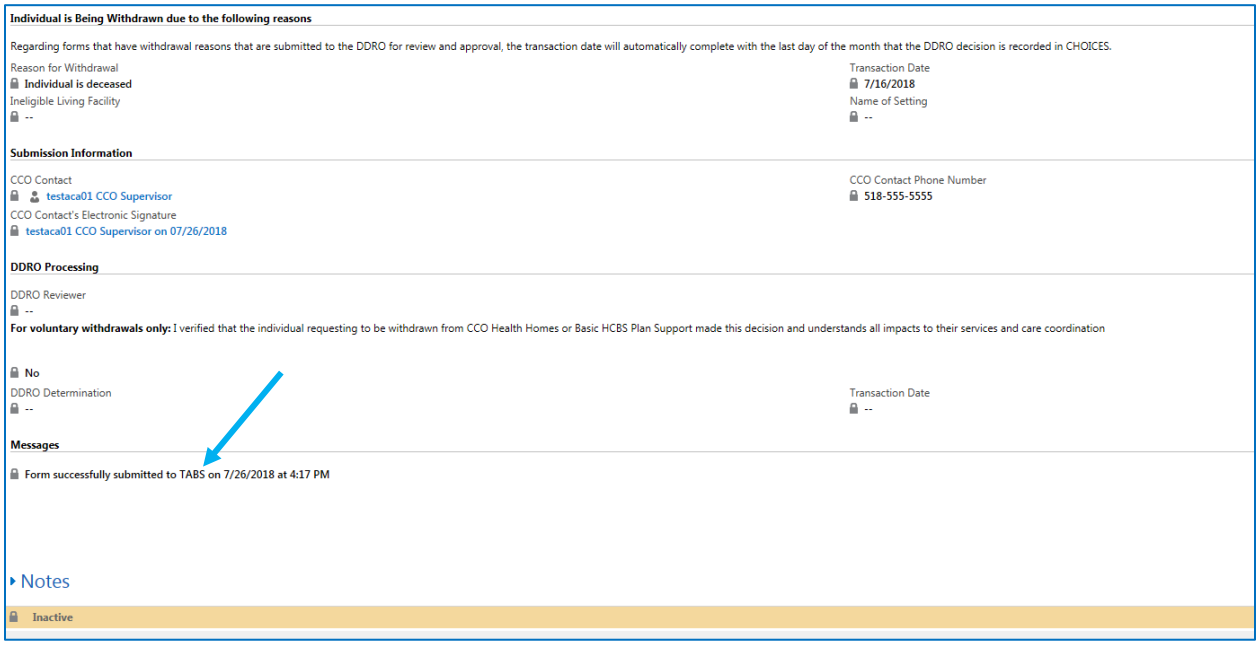
The signature page will display after the user clicks, Submit. Read the informational paragraph, click the box noting **– “By checking this box…”,** enter your password and then click Submit button.



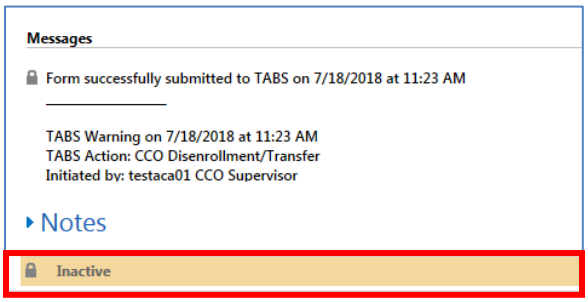
The form will then complete with the electronic signature.



Once the form has been submitted, the user must return to the form to read if the form was successfully submitted to TABS and review the TABS Messages.



Finally, the form becomes “Inactive,” indicating that no further action by either CCO or DDROs is necessary.



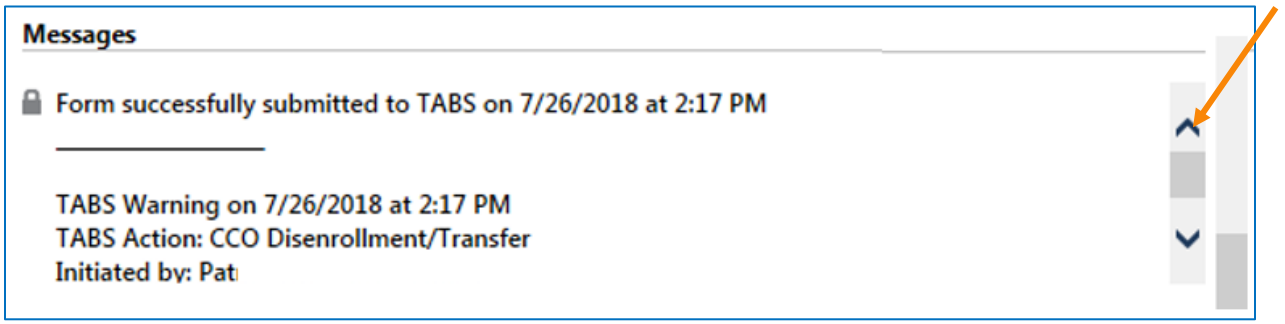
Note: Forms that require the DDSO to review and process will not have a TABS message. These forms will remain “Active” till the DDSO completes its processing.

TABS Messages

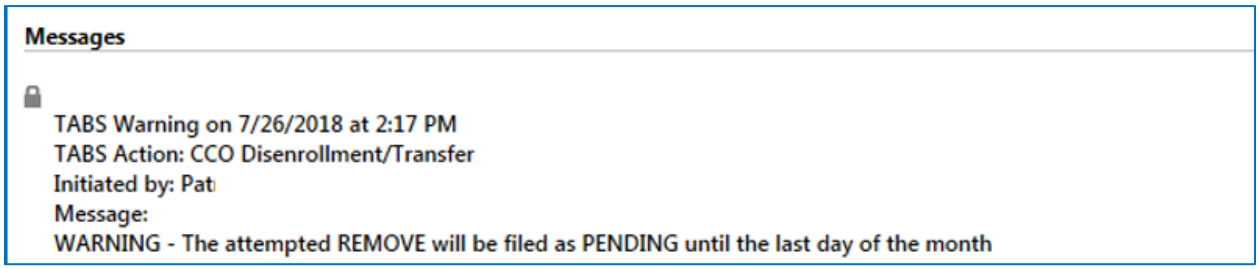
The first line of the message box will note if the form's submission was successful.

The subsequent "Warning" messages are critical to read and if necessary correct the form or the person's record to ensure the disenrollment will occur the last day of the month.

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



"*The attempted REMOVE will be filed as PENDING* …" is a valid message, for all reasons listed on page 8, where the Transaction Date field auto completed as the last day of the month.



For Transfers the following TABS Messages may appear

OPT – Individual is enrolled in an HCBS Care Management Program. The removal from the other program will occur first and then the individual will be enrolled into the new program code

DAT – The Add Date to CCO Program must be the 1st of the next month. The individual will be added to the new program code the 1st of the next month.

PREM – Individual has a CCO Pending remove which must be processed first. The removal must occur first before the add can be completed.