NEW YORK STATE OF OPPORTUNITY.

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

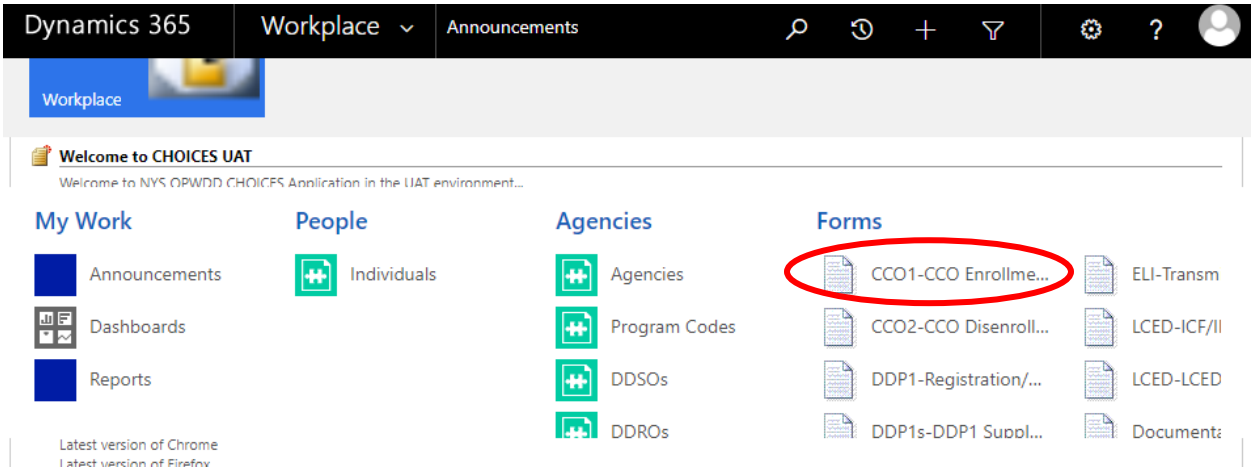
The CHOICES roles that will have access to this form are the following:

- 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.

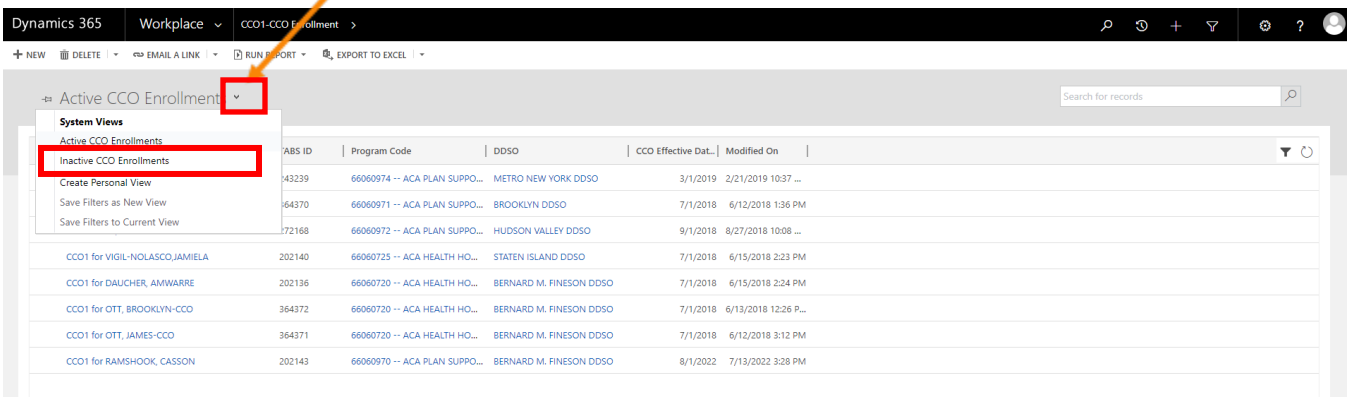
Click on CCO1-CCO Enrollme… under Forms.



Views and Sorting

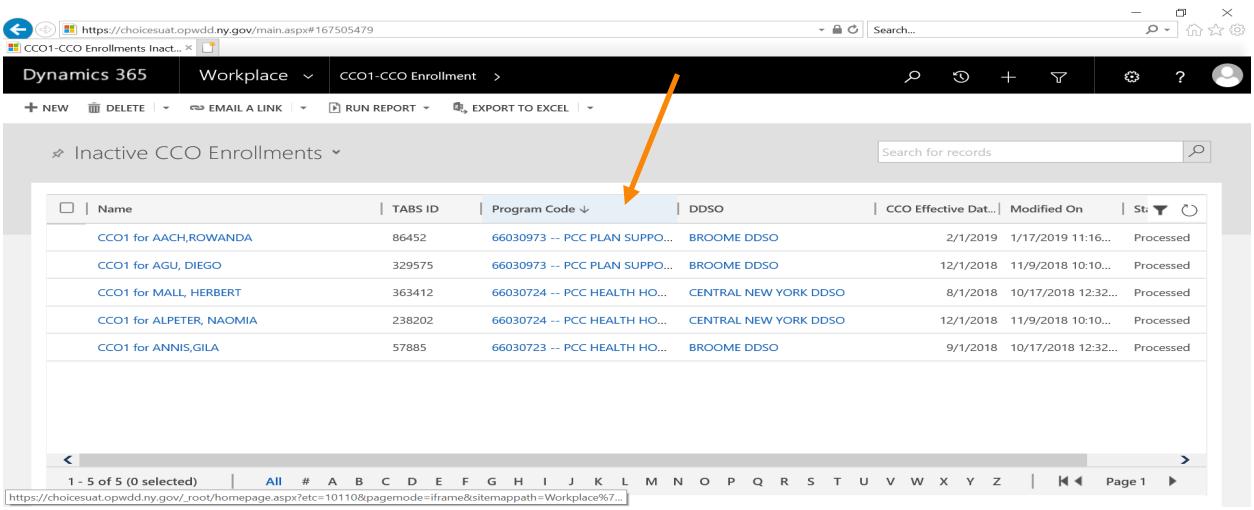
The default view is to the “Active” list. Within this list, Saved forms will display.

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



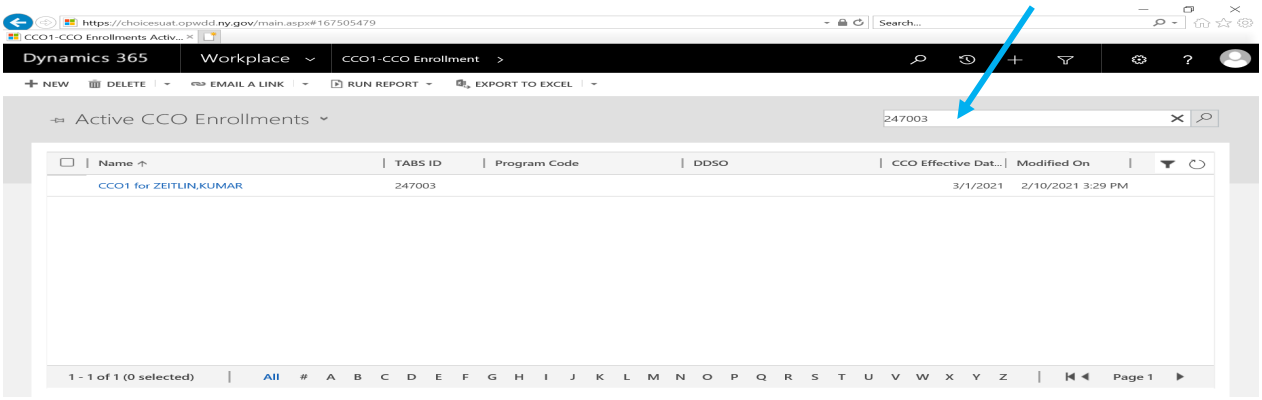
By clicking on the, *Inactive CCO1,* the list displays all inactive forms. See “Form Statuses” Section on the meanings of Active and Inactive.

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

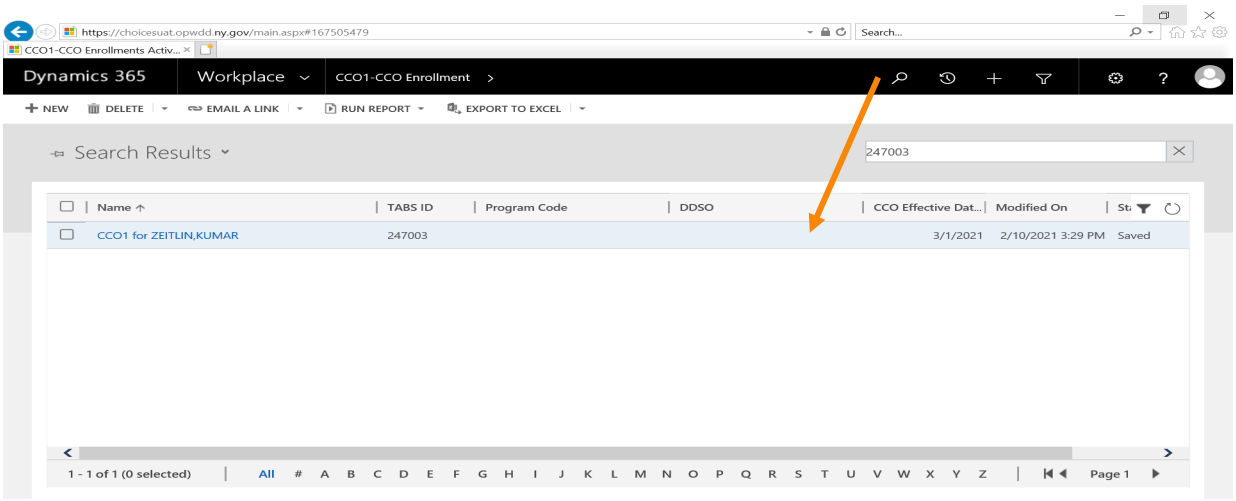


To Search for a Specific Individual

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:

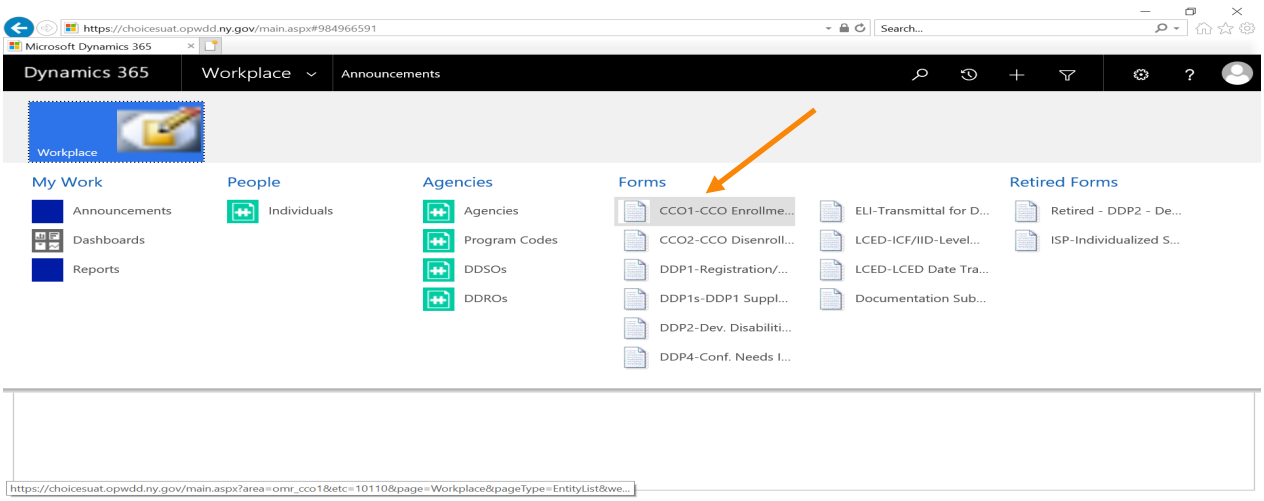
1. Saved – A saved form can be opened, edited and then saved or submitted.

Inactive status for the CCO1 form is:

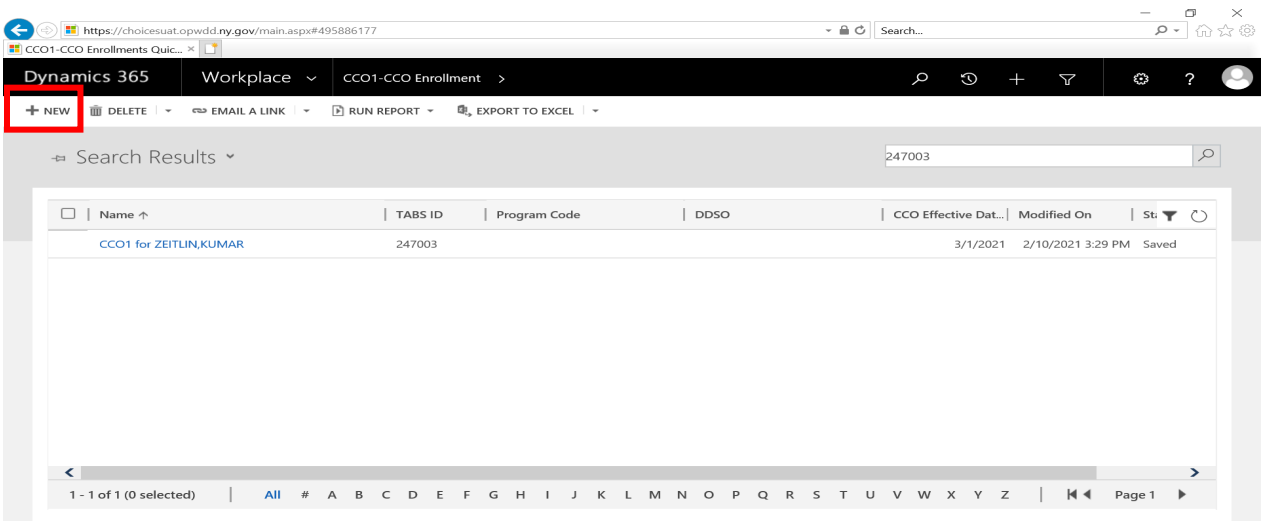
1. Processed – this form has been submitted and filed to TABS.

Completing the Form

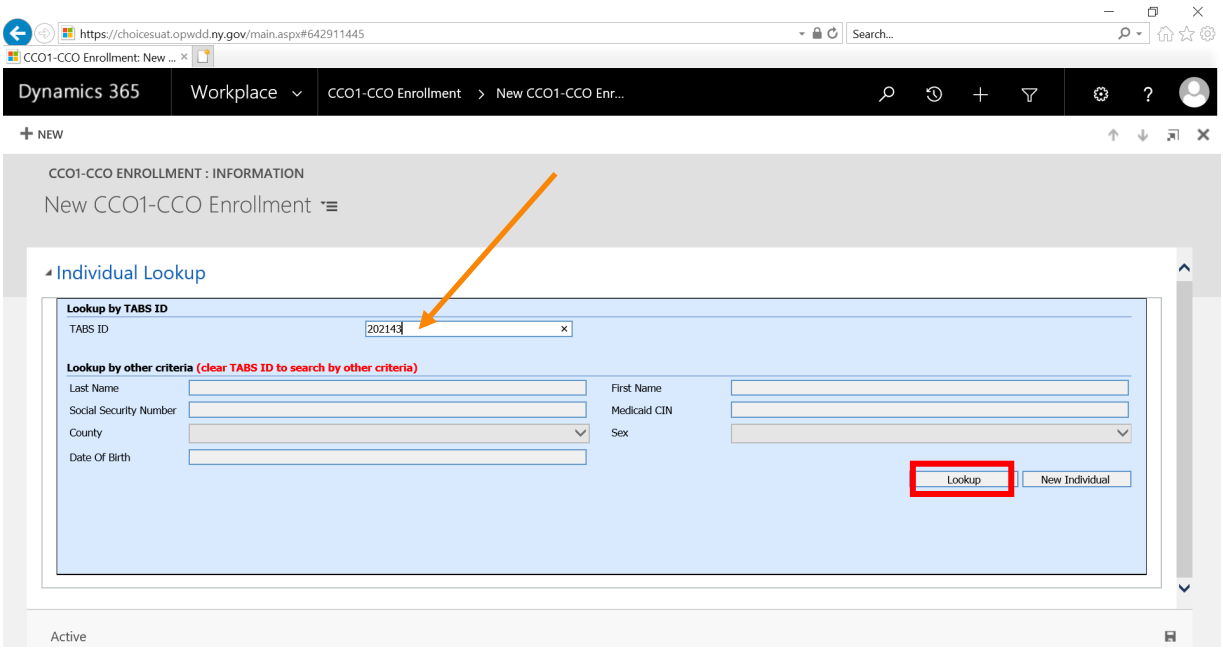
The person to be enrolled will not be known to the CCO in CHOICES, therefore they will not be on the "Individuals" list, so you will need to go to the **CCO1** sub-section under, **Workplace**.



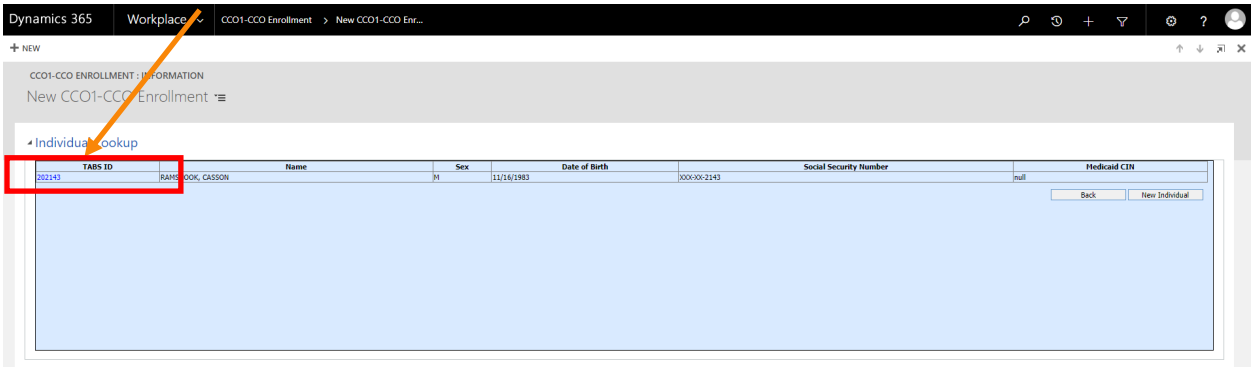
At the CCO1 section, click on the "+ New"



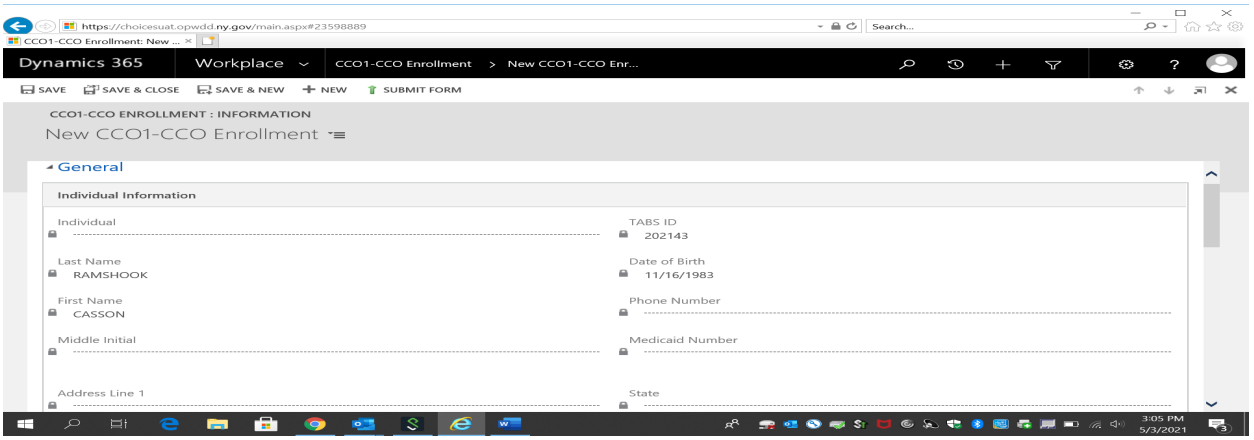
1. Enter the TABS ID of the person in the TABS ID box, then click Lookup.



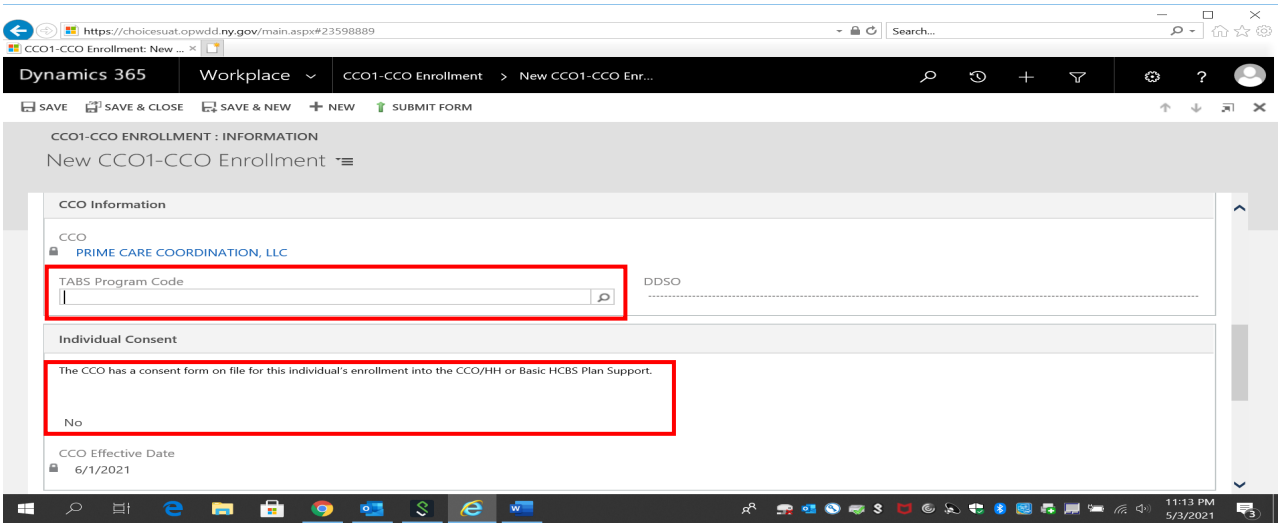
2. The results will load, check the person's name, if a match, click on the TABS ID number, which is a hyperlink to pull the information into the CCO1 form.



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.



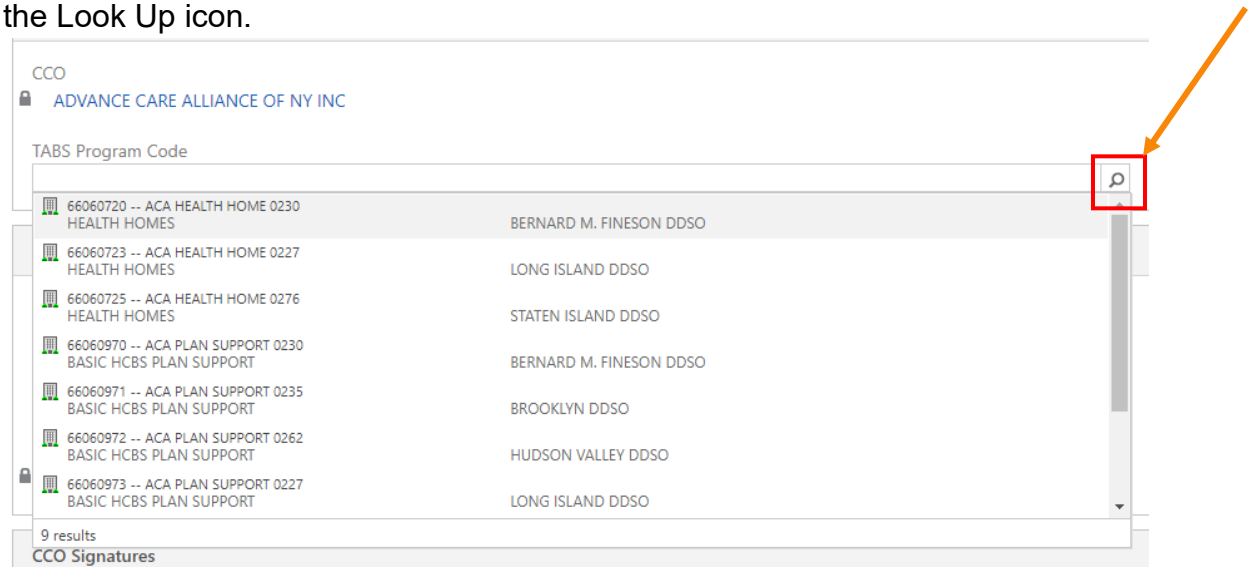
Only two fields, *TABS Program Code* and *Individual Consent*, need to be completed by the user to submit.



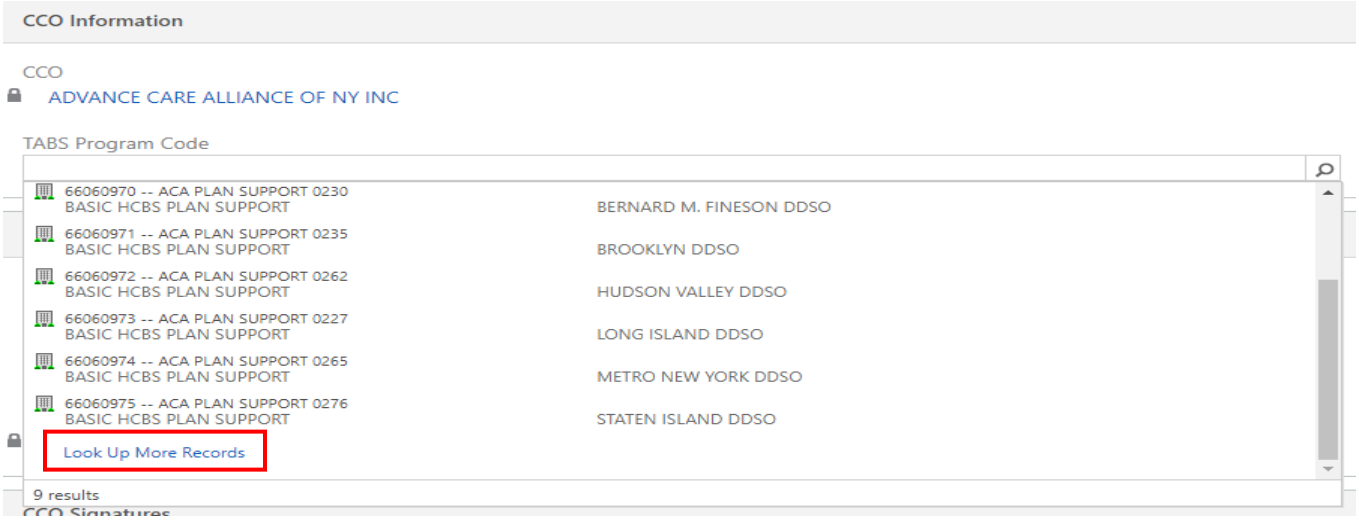
NOTE: Each CCO will be affiliated with multiple DDSOs, please be sure to select the program code that is associated with the DDSO in which the person is registered. The Notice of Decision will have the DDSO. If unsure, please contact any of your affiliated DDSOs for help.

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.

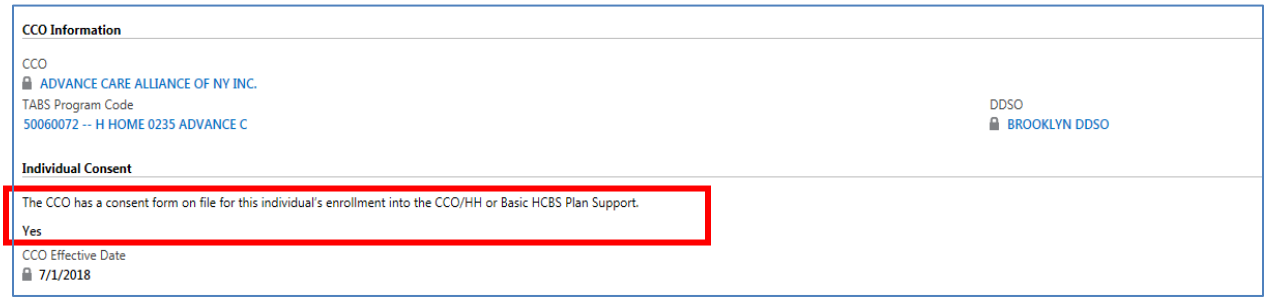


The Look Up icon allows you to view all TABS Program Code fields. Scroll to the bottom of the list and click on “Look Up More Records” to find additional program codes.

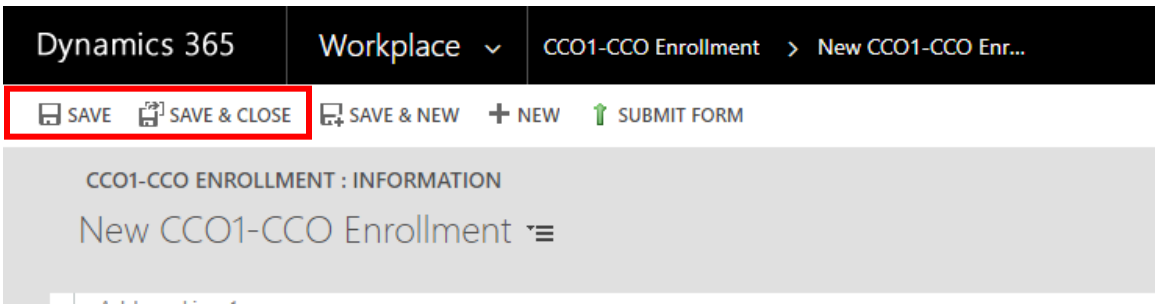


Once the TABS Program Code is selected the corresponding DDSO will automatically complete.

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.

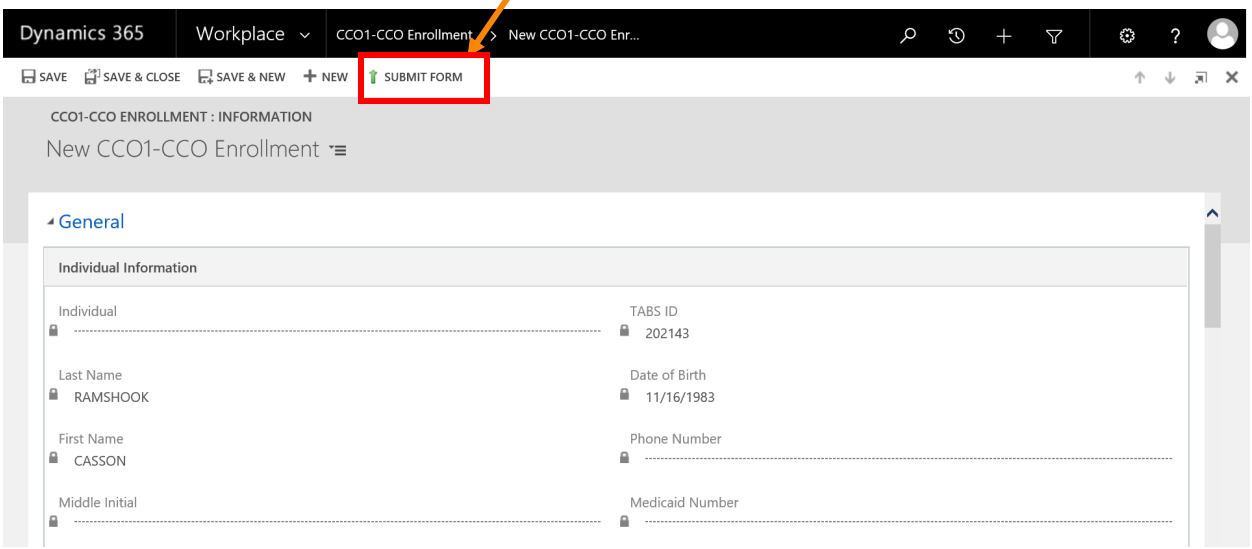


If necessary, the user can “Save” or “Save & Close” the form and return later to submit.

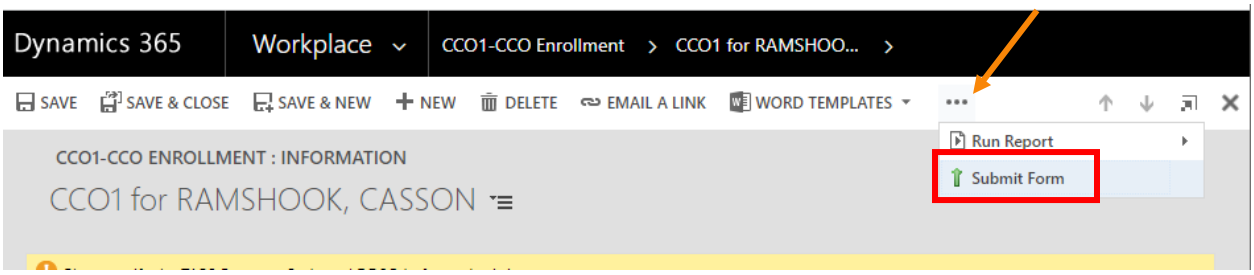


Submit the Form

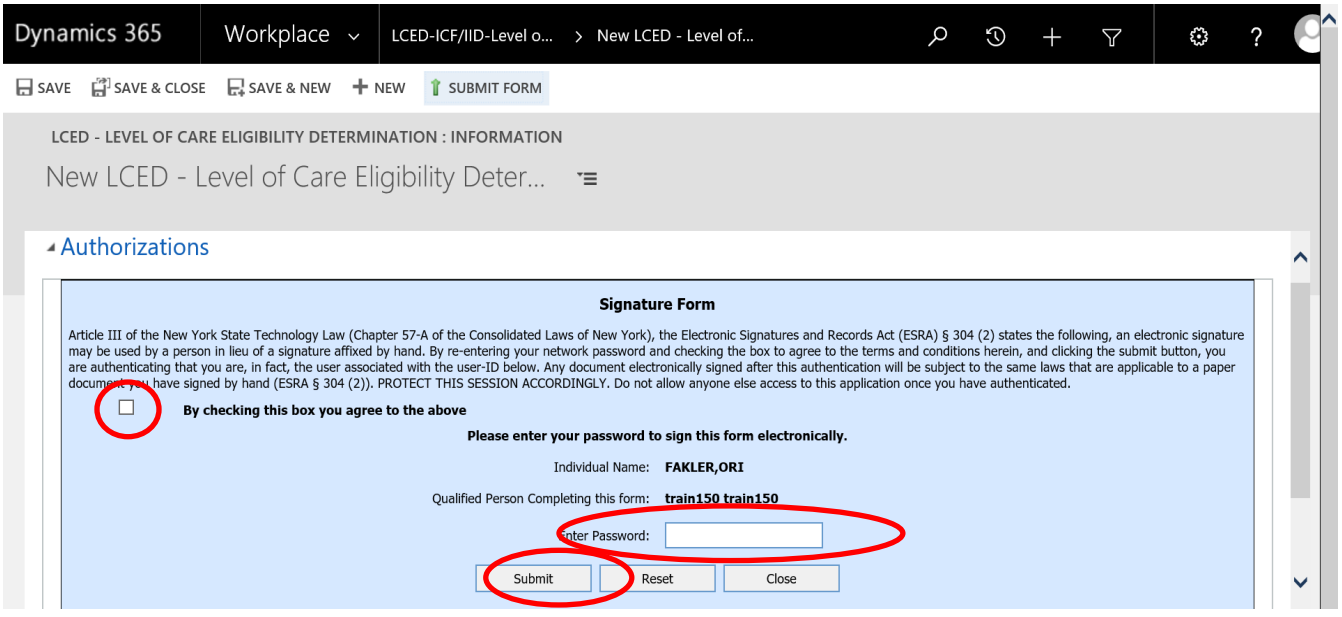
Click the “Submit Form” icon to submit the form.



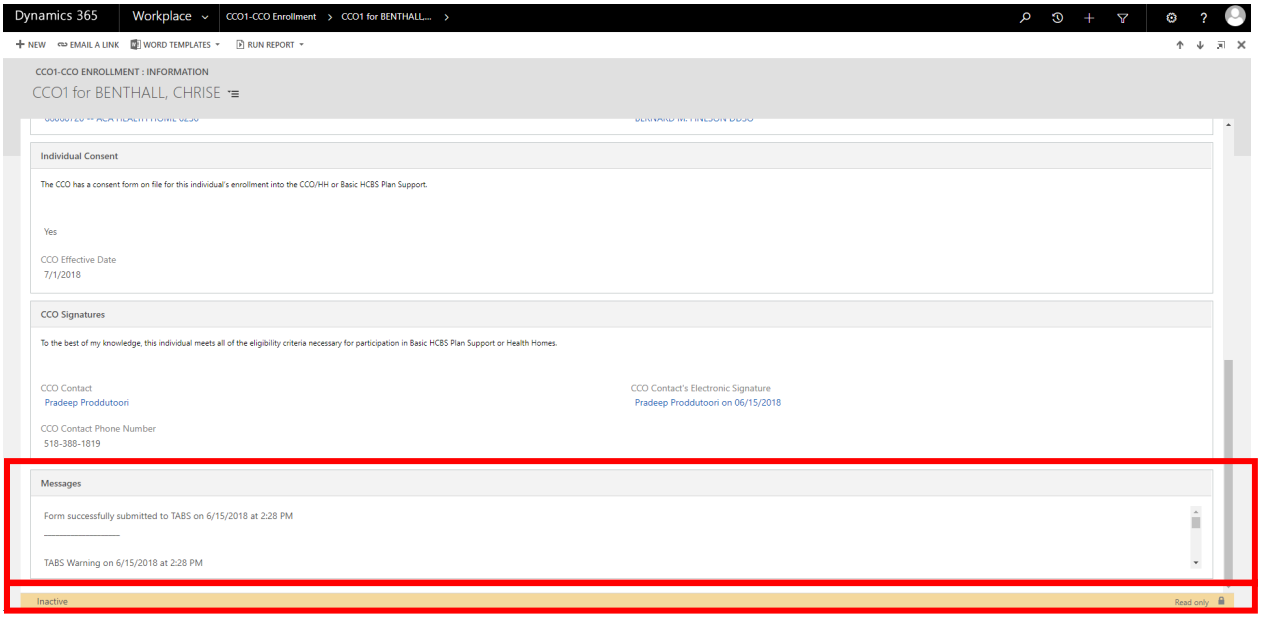
If the form had been saved before needing to submit, then, at the top of the form, you may need to click the 3 dots to display more functions, including, “Submit.”



The 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.

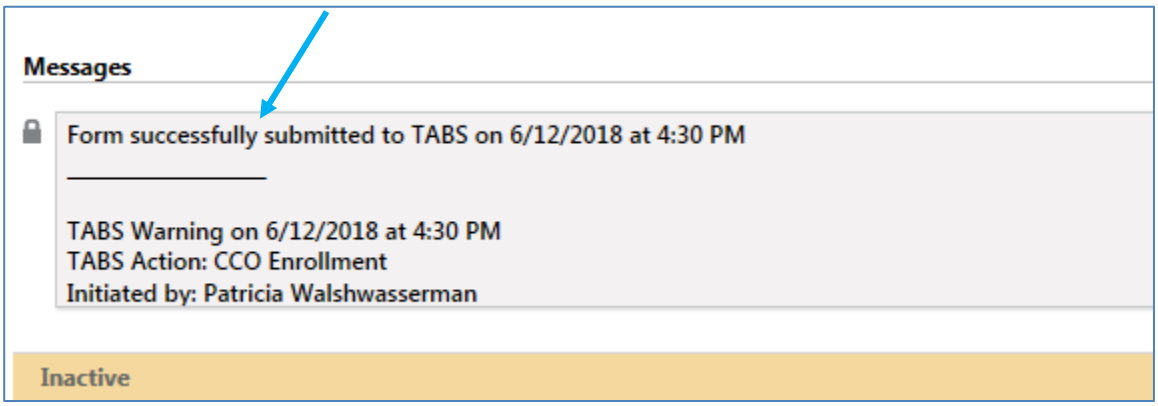


Once the form has completed processing to TABS, a yellow line displays at the bottom of the form with “Inactive” noted. The user must then read the TABS Warning messages.

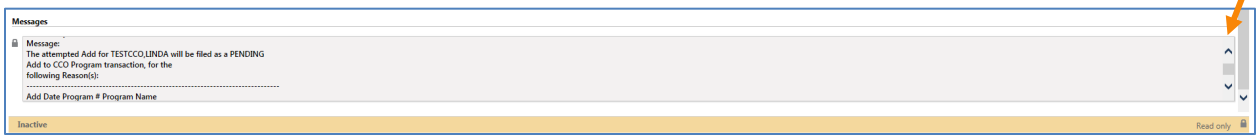


TABS Messages

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 1st of the next month.

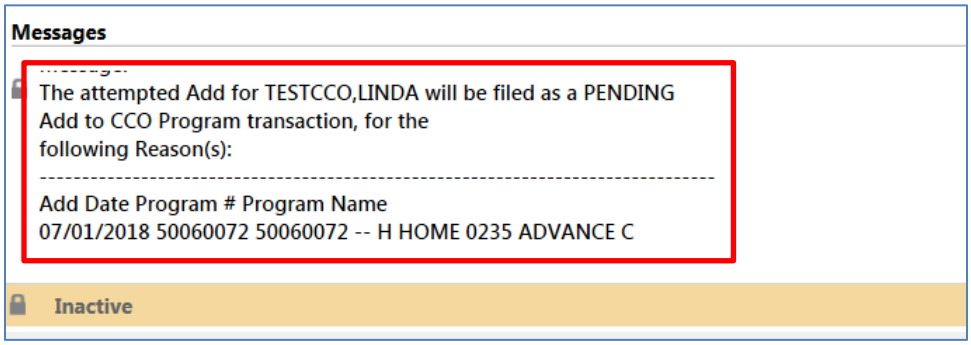


To view the whole message, use the scroll bar at the end of the message box, not the form's scroll bar.



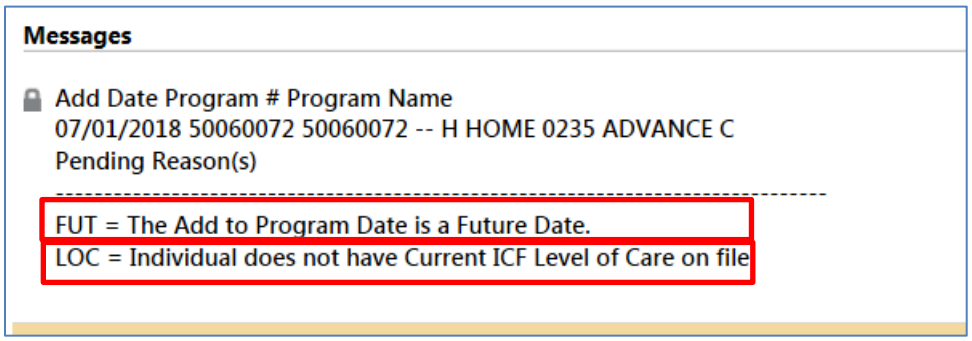
Possible Messages are:

"*PENDING Add to CCO*…" is a valid message since the add is always the 1st 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

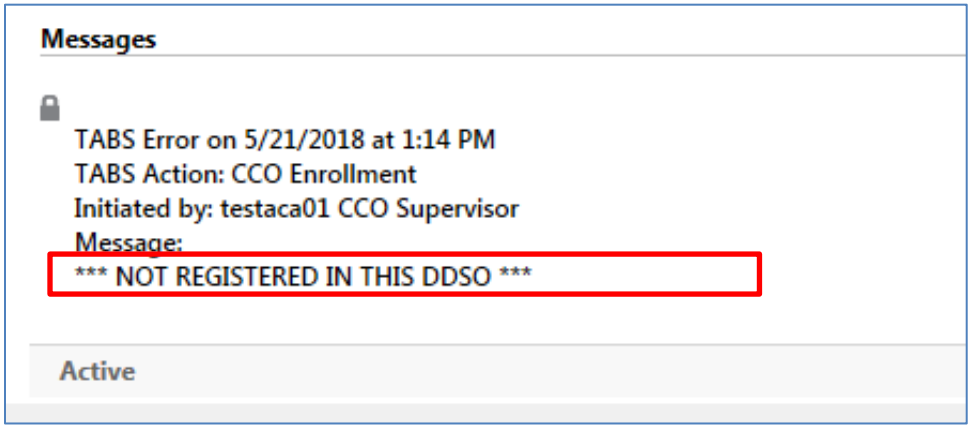
LOC means the LCED Effective Date is not on file in TABS and CCO enrollment cannot occur until this is fixed. However, the enrollment will pend until the issue is fixed. Enrollment will be the 1st of the month following the fix being filed.



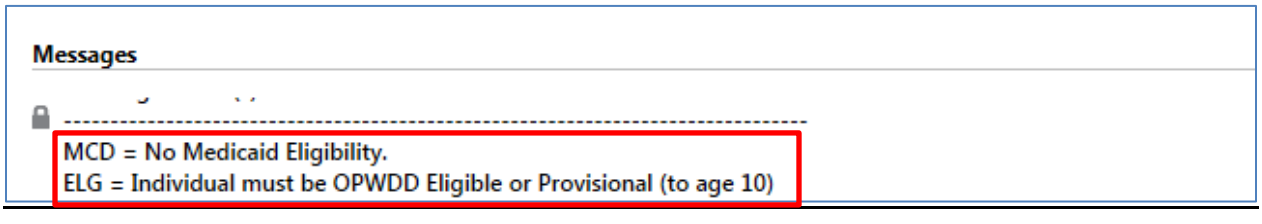
Not Registered in this DDSO message means the form has not filed to TABS for a pending enrollment.

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.



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 1st of the month following the fix being filed.