Office for People With Developmental Disabilities

Service Amendment Request Tool (SART) CHOICES User Guide for Care Coordination Organizations (CCOs)

Service Amendment Request Tool (SART) CHOICES User Guide for Care Coordination Organizations

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Introductions and Instructions for How to Navigate this User Guide

This User Guide has been developed to provide technical instructions to Care Coordination Organization (CCO) staff on how to create and submit a Service Amendment Request Tool (SART) in the Office for People With Developmental Disabilities (OPWDD) CHOICES system.

There are links throughout this guide that will bring the reader to other locations within the document.

It is OPWDD's goal to keep this User Guide current to the best extent possible. Revisions will be made as needed when any service system or process changes impact the SART within CHOICES. Future updates made to this guide will be shared with CCOs.

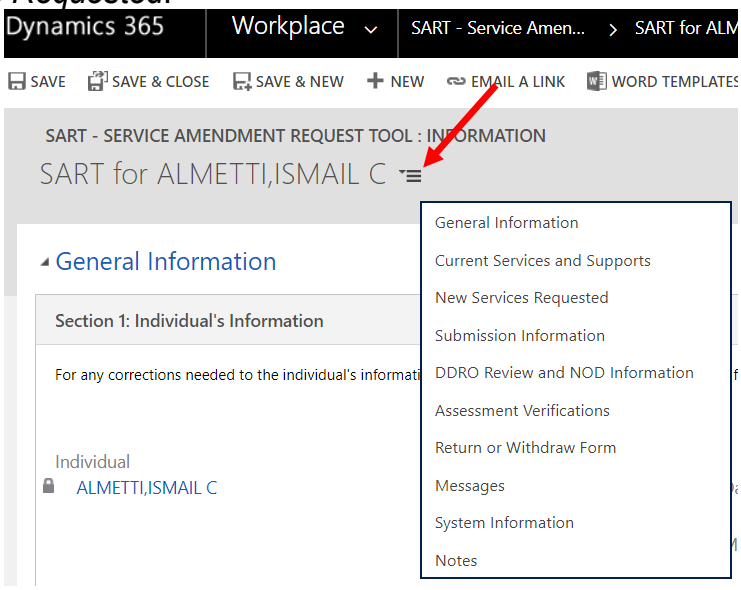
Further information regarding the Service Amendment process and policies can be found in the *Service Amendment Request Tool (SART) Manual*.

Disclaimer

The information shown in this guide is in the CHOICES Testing Environment and is entirely fictitious and used for illustrative purposes only. The examples given are not related to any real people and are provided to demonstrate how the tool functions but, are not intended to be used as a model for real-life scenarios.

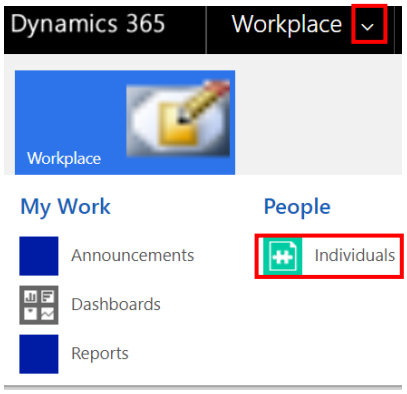
Form Sections Menu

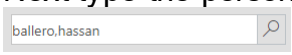
To navigate to different sections within the SART once it has been opened, there is a *Form Sections* menu (icon of 3 lines next to the title of the SART, *SART for Last Name, First Name*). Click on the icon to display the *Form Sections* menu which lists the different sections of the SART that the user can move to directly by clicking the name of Section. For example, New Services Requested moves the user to *Section 8 – New OPWDD Services Requested*.



Creating a New SART

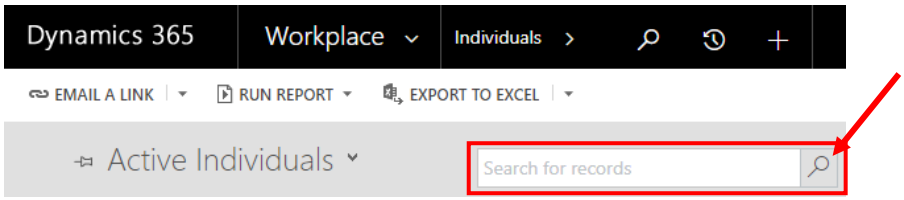
Navigate to the *Individuals* section of CHOICES. Click the arrow next to *Workplace* then click *Individuals* under the *People* column.



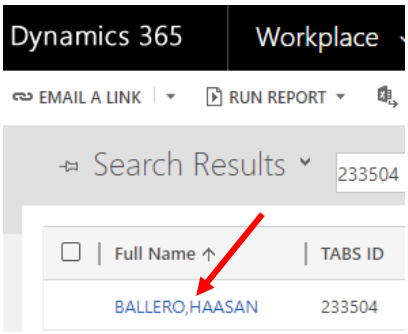
Next type the person's name (format must be: *Last Name,First Name* with no spaces 

) or type their TABS ID

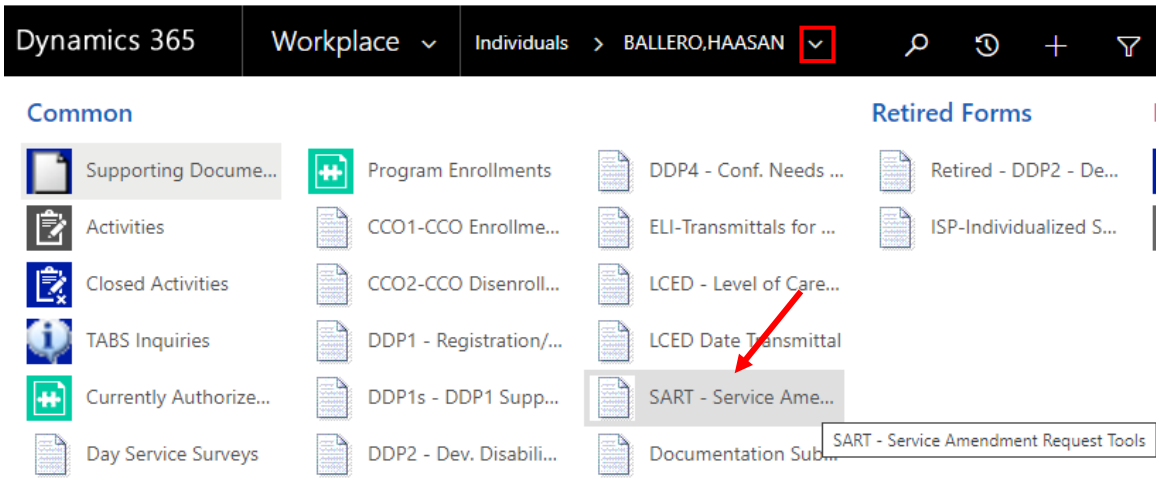
into the *Search for records* box and click the search icon (magnifying glass) or hit the enter key on your keyboard.



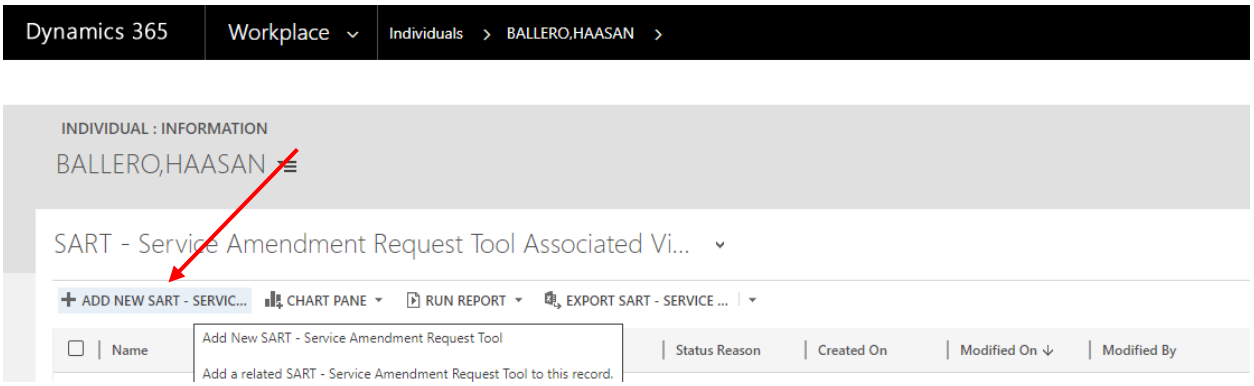
Then click the hyperlink of person's *Full Name* to bring you to the person's *Individual: Information* record in CHOICES.



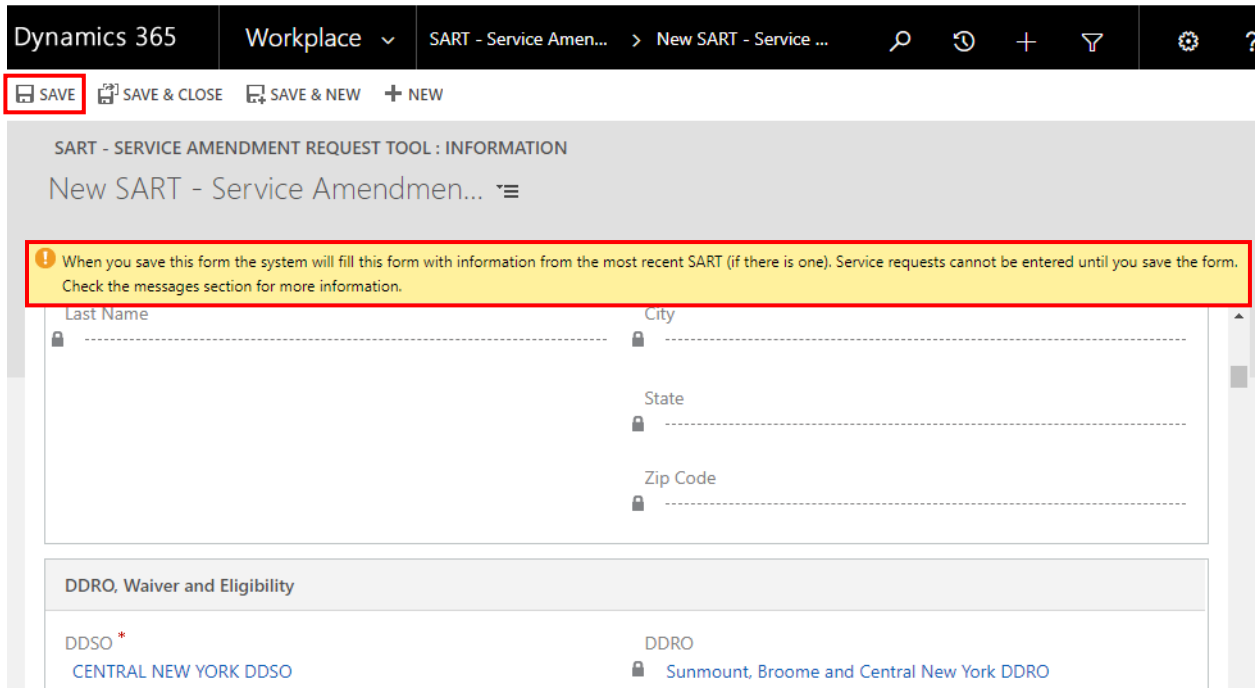
Once at the person's *Individual: Information* record, click the arrow next to the person's name to display the sections of the person's CHOICES record. Then click *SART – Service Amendment Request Tools*.



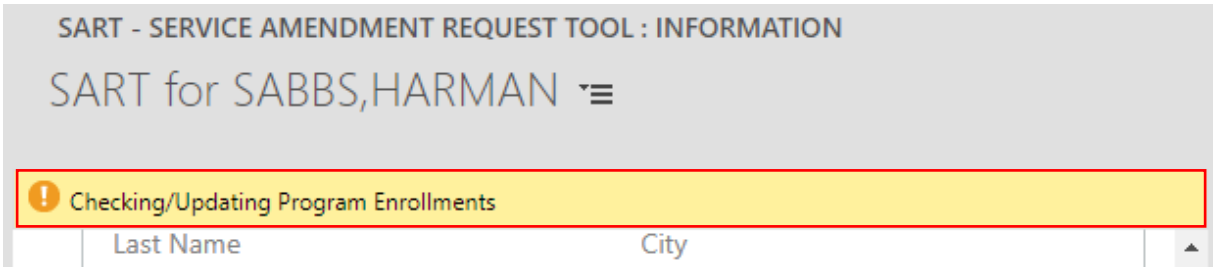
After the SART Form Section opens, click + *Add New SART – Service Amendment Request Tool* to create a new SART.



A *New SART – Service Amendment Request Tool* pop-up window will open. The SART will display at the bottom of the *Legal Guardian Information* Section. Click *Save* immediately so that information can be entered (the yellow message box reminds you to do this).

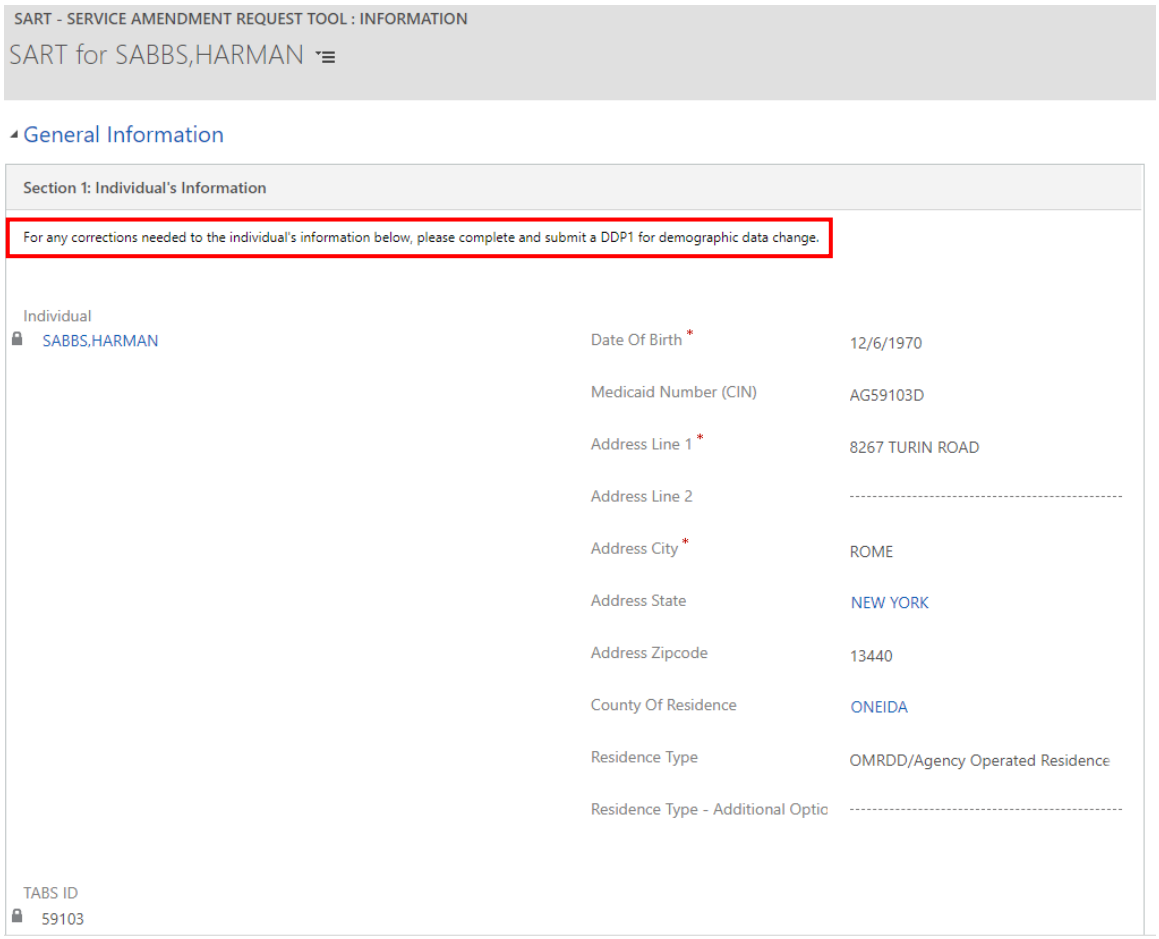


A second yellow highlighted message displays immediately after you click *Save*. Allow the SART to finish processing all messages and then scroll to *Section 1 – Individual's Information*.



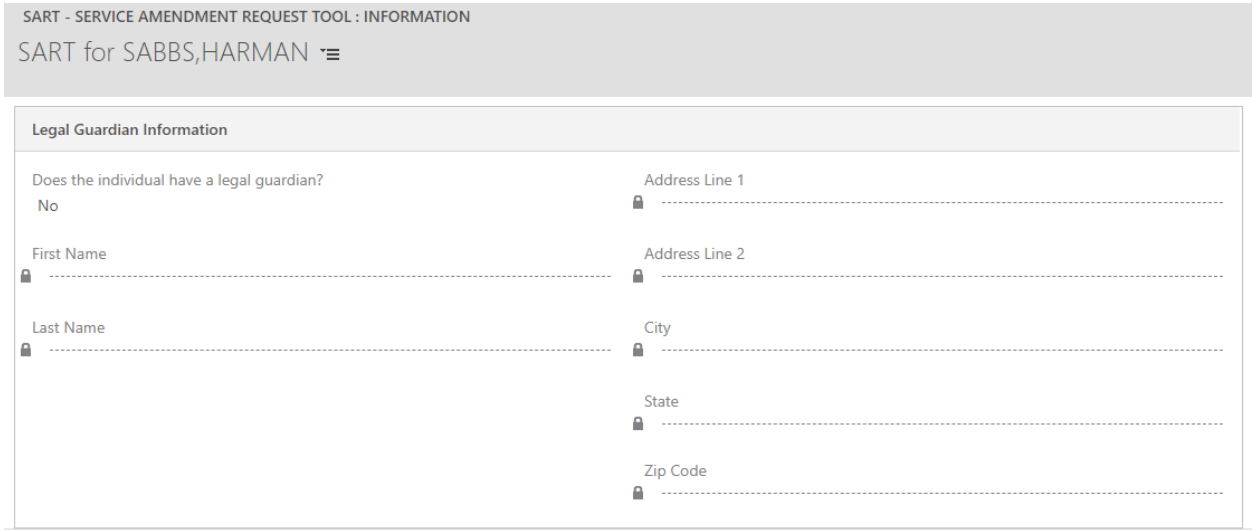
Section 1 – Individual's Information

Section 1 – Individual's Information contains the person's demographic information that auto populates from the person's record. This section is never editable. Any corrections **must** be made through the submission of a Developmental Disabilities Profile 1 (DDP1) for a demographic change.



Legal Guardian Information

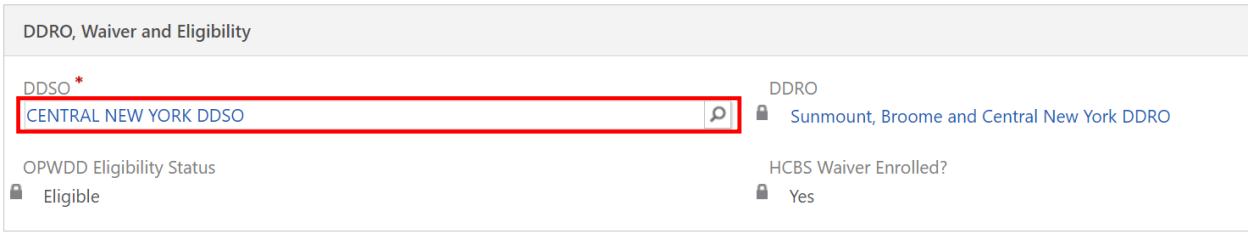
The question: *Does the individual have a legal guardian?* automatically defaults to *No*. If the person has a Legal Guardian, change the response to *Yes* and complete all the other text fields.



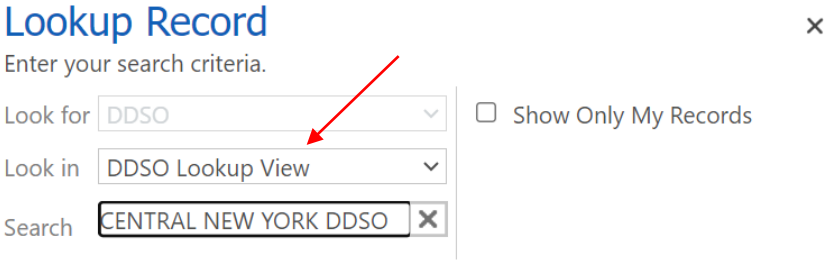
DDRO, Waiver and Eligibility

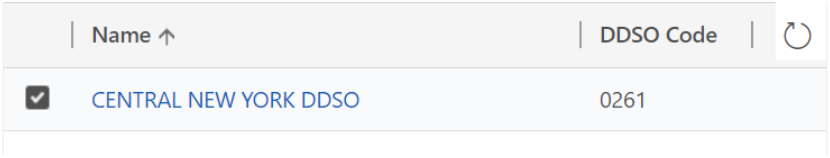
This section will auto populate and only the DDSO field is editable. If changing the selected DDSO results in a different DDRO, the correct DDRO will auto populate.

To edit the selected DDSO, hover over the field and the search icon (magnifying glass) will display. Click the search icon then click the *Look Up More Records* hyperlink to open the Lookup Record pop up window and all the available DDSOs to select from will display.

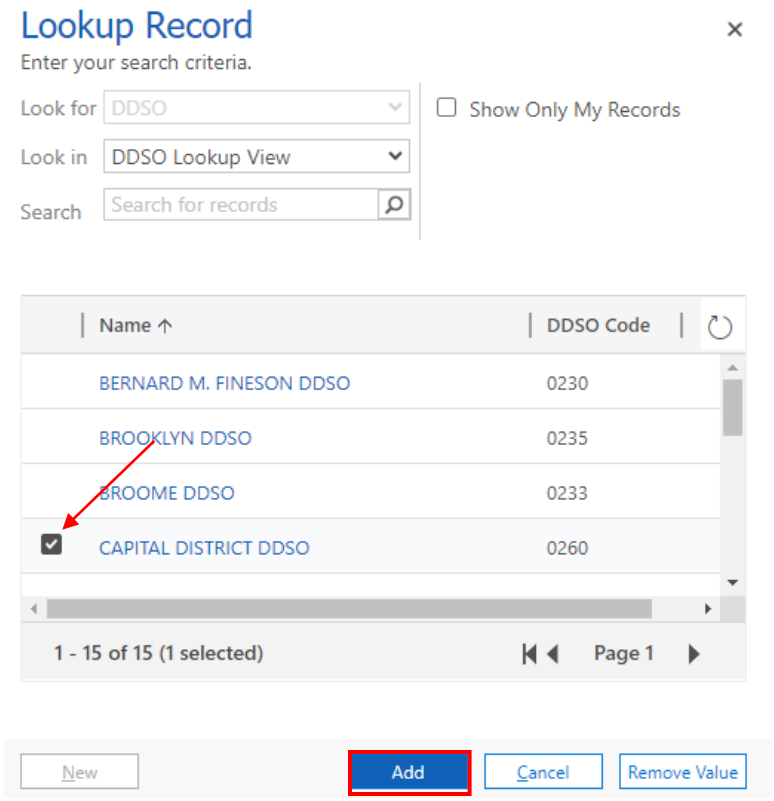


In the Lookup Record pop up, click the *X* to remove the current DDSO selected.

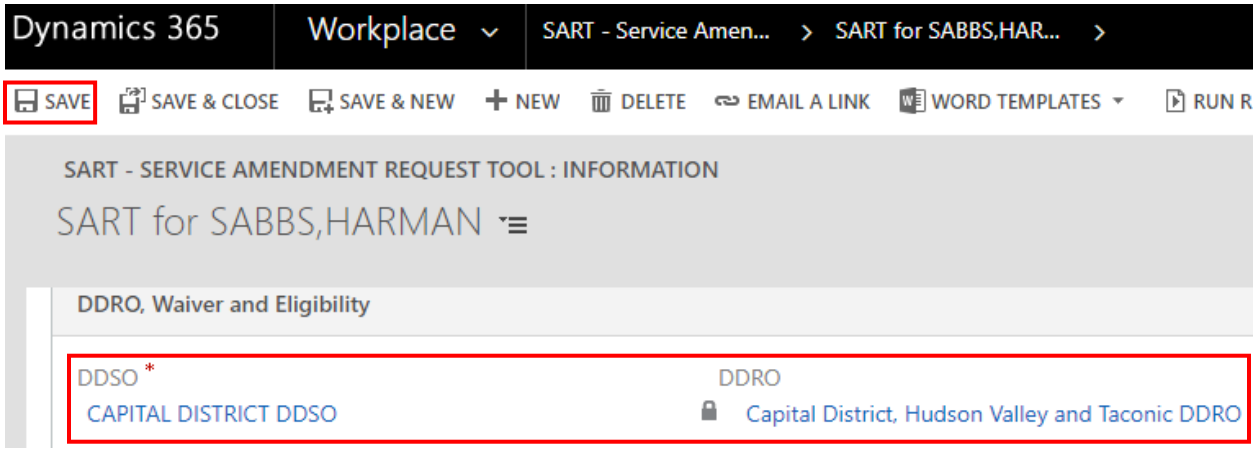




Then scroll through the list to select the desired DDSO, then click *Add*.



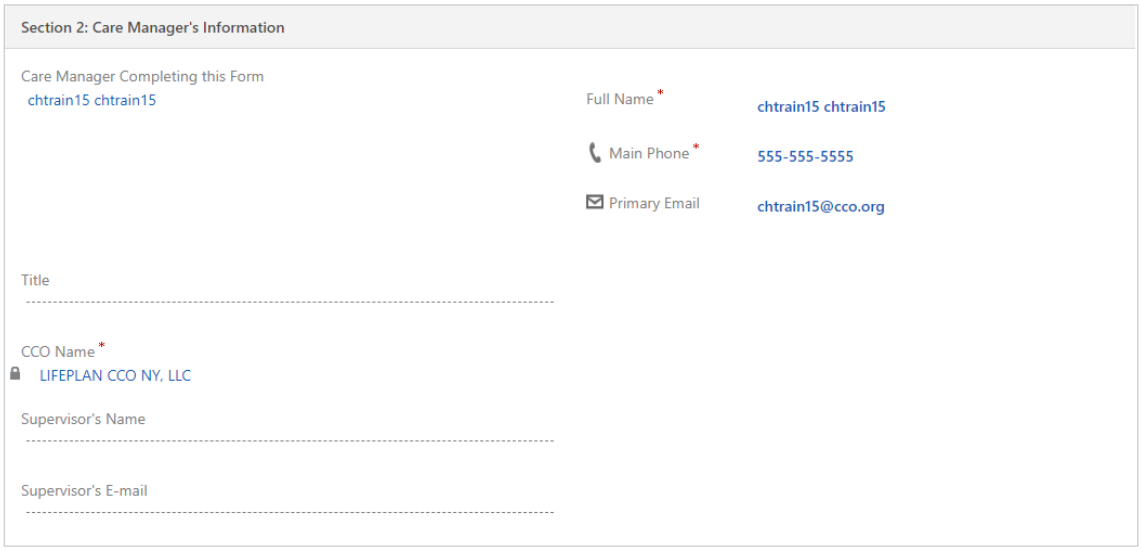
The selection added will then display on the SART. Click the *Save* button and that will save the selected DDSO the user added onto the SART. Now the newly selected/added DDSO will receive the SART once submitted. This action only changes the DDSO/DDRO that the SART is submitted to for review and completion. See the *Service Amendment Request Tool (SART) Manual* for instructions on how to change a person's DDSO/DDRO throughout OPWDD databases.



Section 2 – Care Manager's Information

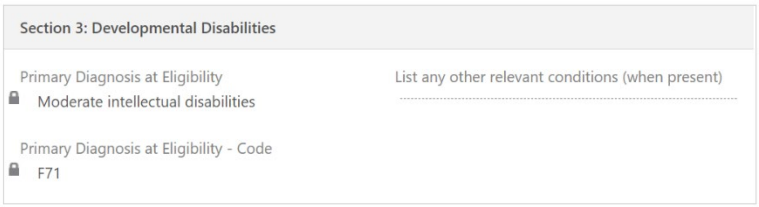
The majority of fields within *Section 2 – Care Manager's Information* auto populates from the CCO user's CHOICES User Profile. The user **must** enter information into the

Care Manager's Title, Supervisor's Name and Supervisor's Email as these required fields **do not** auto populate any information. The user cannot edit the auto populated information. Changes to those fields can made in the CHOICES User Profile.



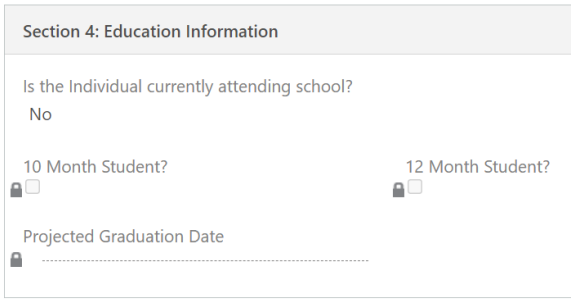
Section 3 – Developmental Disabilities

Section 3 – Developmental Disabilities auto populates the person's primary diagnosis information recorded in TABS/CHOICES at the time they were determined OPWDD eligible. This section is not editable.



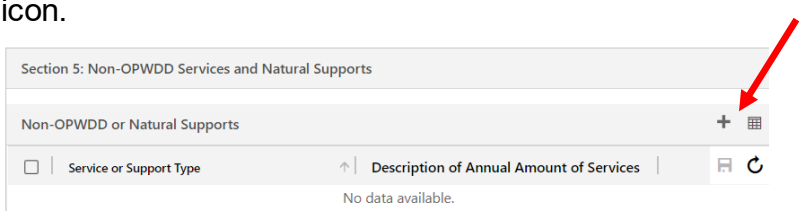
Section 4 – Education Information

Section 4 – Education Information requires the CCO to answer the question *Is the Individual currently attending school?* The answer to this question automatically defaults to *No*. If the person is currently attending school, change the response to *Yes* and complete the other required fields as appropriate. Either the *10 Month Student?* box or *12 Month Student?* box **must** be checked and a *Projected Graduation Date* **must** be entered. Both check boxes **cannot** be checked off at the same time.

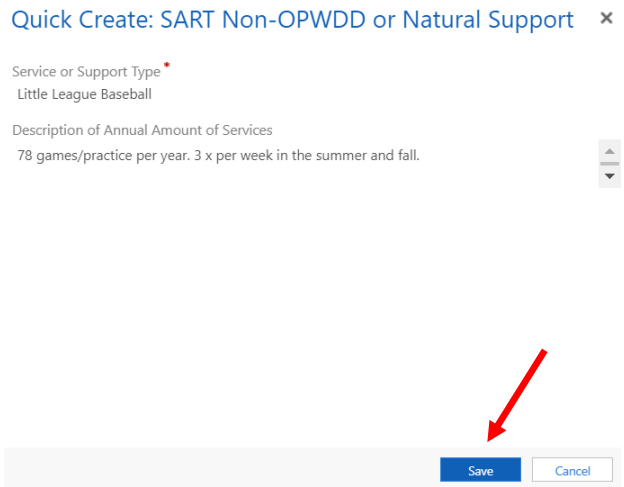


Section 5 – Non-OPWDD Services and Natural Supports

Non-OPWDD Services and Natural Supports are added to *Section 5* by clicking the **+** icon.



The *Quick Create: SART Non-OPWDD or Natural Support* window will pop up. The

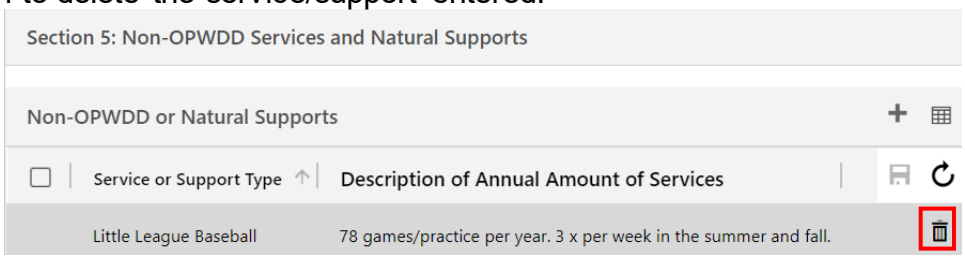


Service or Support Type field is required. Only one service/support can be entered at a time. A new entry **must** be created for each service/support. Click *Save* to add the service/support onto the person's SART.

To add more services/supports, click the **+** icon to open another *Quick Create: SART Non-OPWDD or Natural Support* pop up window, enter the applicable information, click *Save*, and repeat as necessary to add all applicable services/supports.

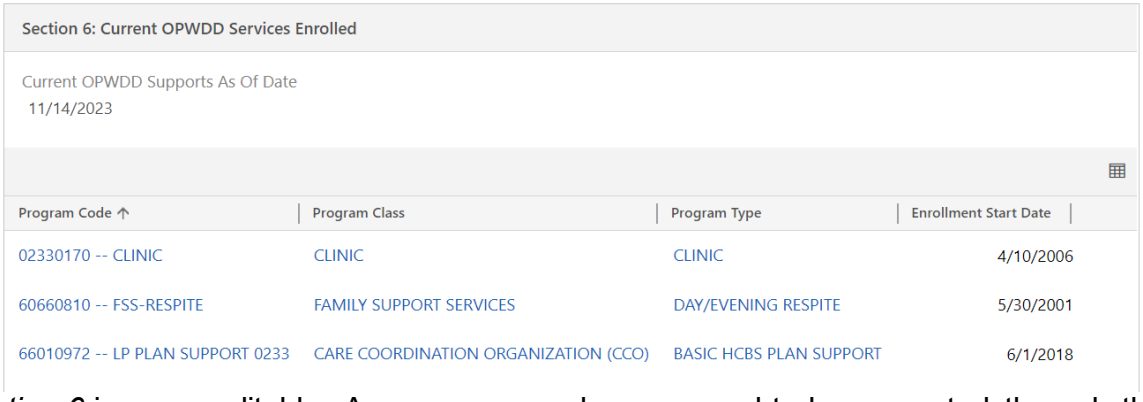
The saved service/support now displays on the SART.

If necessary, a service/support can be deleted. Hover over the service/support line, it will highlight in gray and the delete icon (garbage can symbol) will display. Click the delete icon to delete the service/support entered.



Section 6 – Current OPWDD Services Enrolled

The information in *Section 6 – Current OPWDD Service Enrolled* auto populates the person's active program code enrollments from their TABS/CHOICES record. This information will only display once the SART is *Saved*.



Section 6 is never editable. Any necessary changes need to be requested through the DDP1 process.

Section 7 – Current OPWDD Services Authorized and Receiving

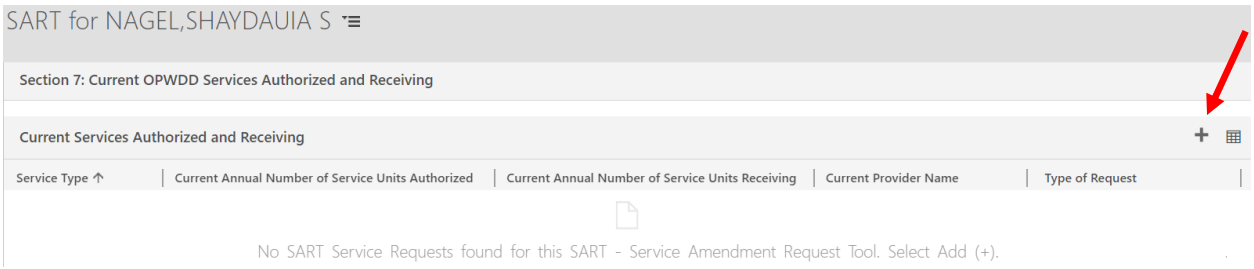
In *Section 7 – Current OPWDD Service Authorized and Receiving*, the user **must** enter:

1. The services the person is currently authorized for in the *Service Type* field,
2. Corresponding authorized service amounts for each *Service Type* in the *Current Annual Number of Service Units Authorized* field,
3. Service amounts the person is currently receiving for each *Service Type* in the *Current Annual Number of Service Units Receiving* field, and
4. Any requests to make a change in the person's annual amount of service units authorized or current providers in the *Change(s) to Service* field.

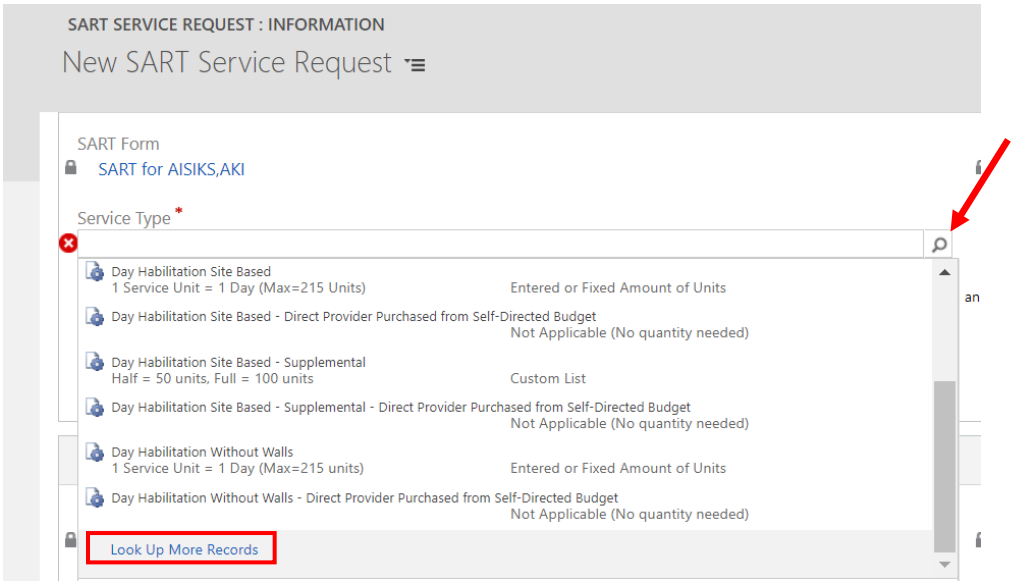
At a minimum, any SART *Service Type* that displays in *Section 6 – Current OPWDD Services Enrolled* **must** be entered in *Section 7*. Not all OPWDD services that display in *Section 6* are an available *Service Type* on the SART.

See Subsequent SARTs section below for information on how this section functions differently depending on if it is a person's initial versus subsequent SART.

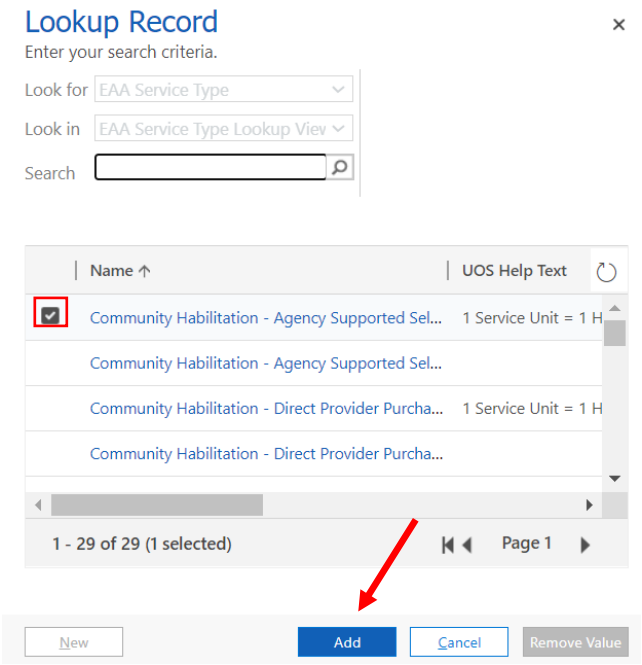
To add a service request, click the **+** icon.



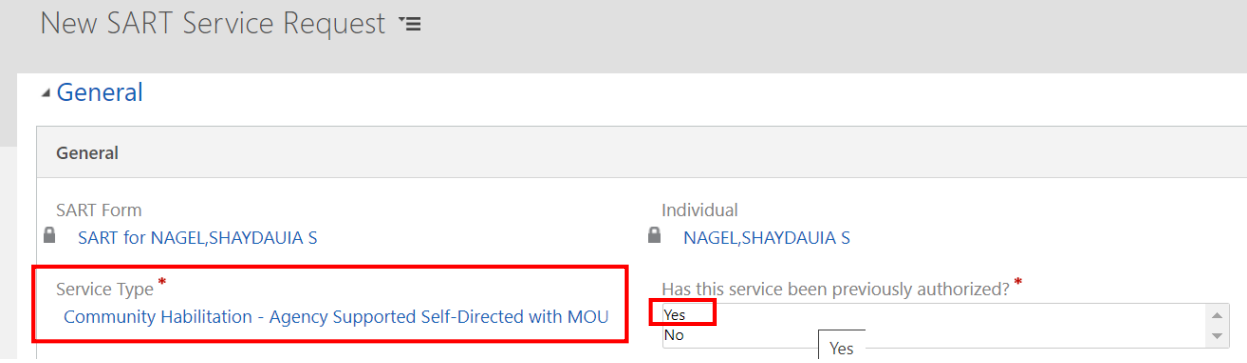
The *New SART Service Request* window will open. Maximize the window for ease of use. Begin with adding the service the person is currently authorized for in the *Service Type* field. Click the search icon (magnifying glass) to open the *Service Type* list. If the *Service Type* is not visible, scroll down, and if necessary, click the *Look Up More Records* hyperlink to open the Lookup Record pop-up window to display the full list of *Service Types*.



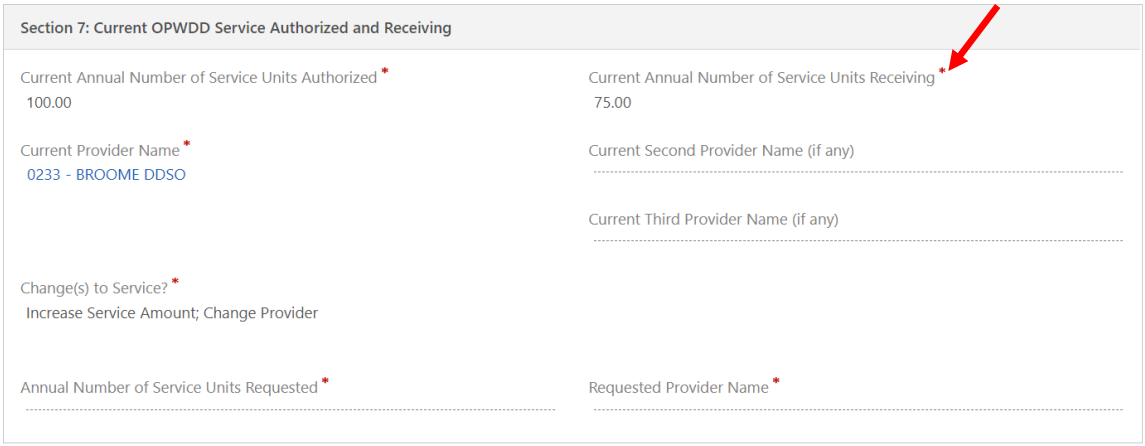
To select a *Service Type* from the list, scroll down to the appropriate *Service Type*, check the box next to the *Name* of the *Service Type*, then click *Add*.



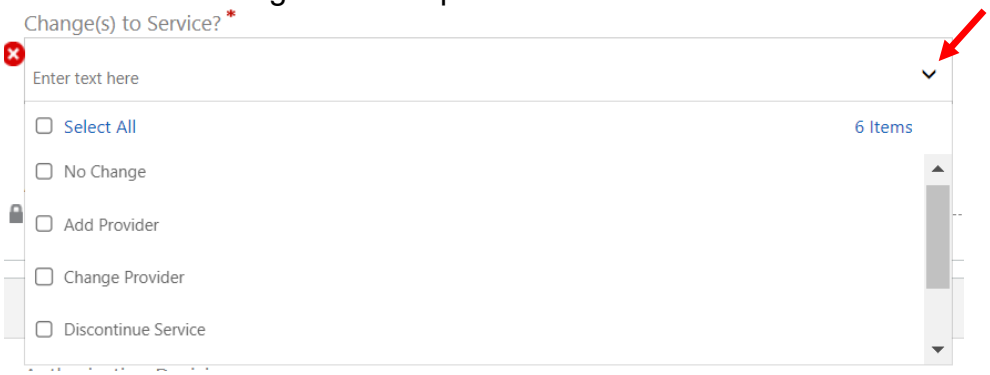
The selection added displays in the *Service Type* field. For *Section 7* service requests, the answer to *Has this service been previously authorized?* **must** be Yes. Once *Yes* is selected, additional fields unlock in Section 7 .

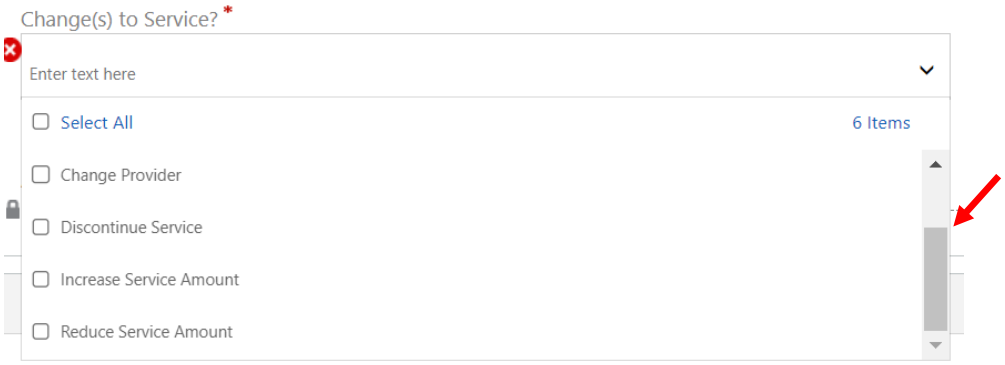


Next the user will complete all required fields. Required fields are marked with a red asterisk (*). An error message will display if a required field is missing information.



Hover over the *Change(s) to Service* field to display the down arrow, click the down arrow to display the *Change to Service(s)* options. Only five options in addition to *Select All* display at once. Scroll down the list to see the remaining options. Check off the applicable option for the *Service Type*. Multiple options can be checked off. For example, *Increase Service Amount* and *Change Provider*. *Select All* is not a functional option on the SART. Please ignore that option.

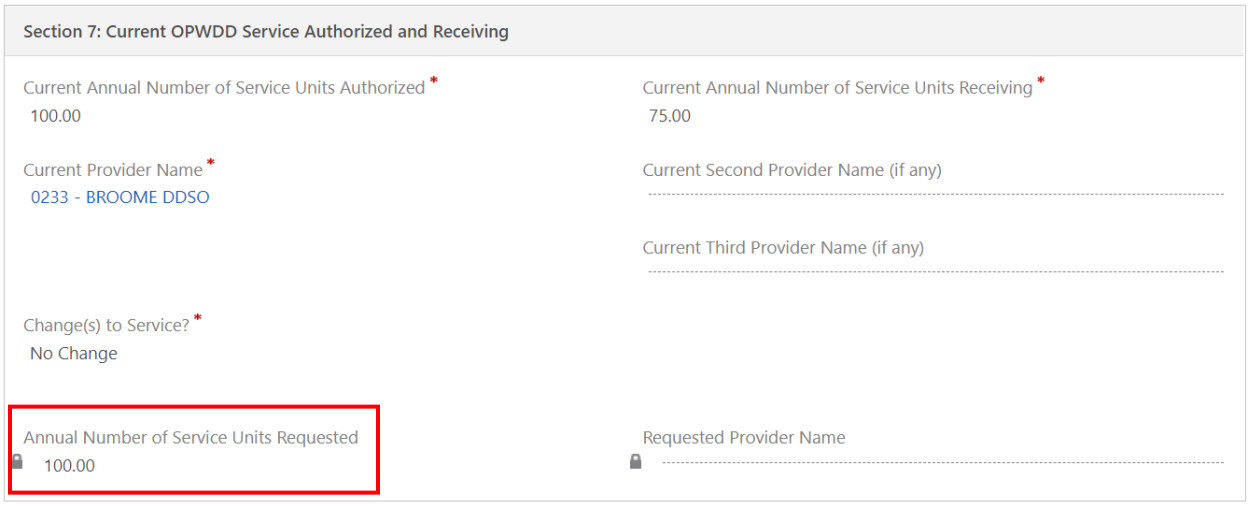




Not all *Service Types* require entry within *Current Annual Number of Service Units Authorized* and *Current Annual Number of Service Units Receiving*. If the *Service Type* does not require the entry of service units, these fields will be locked for editing.

The user's selection in the *Change(s) to Service* field will determine when *Annual Number of Service Units Requested* and/or *Requested Provider Name* is required.

When *No Change* is checked, the *Annual Number of Service Units Requested* auto populates with the *Current Annual Number of Service Units Authorized* and, the field is locked and not editable.

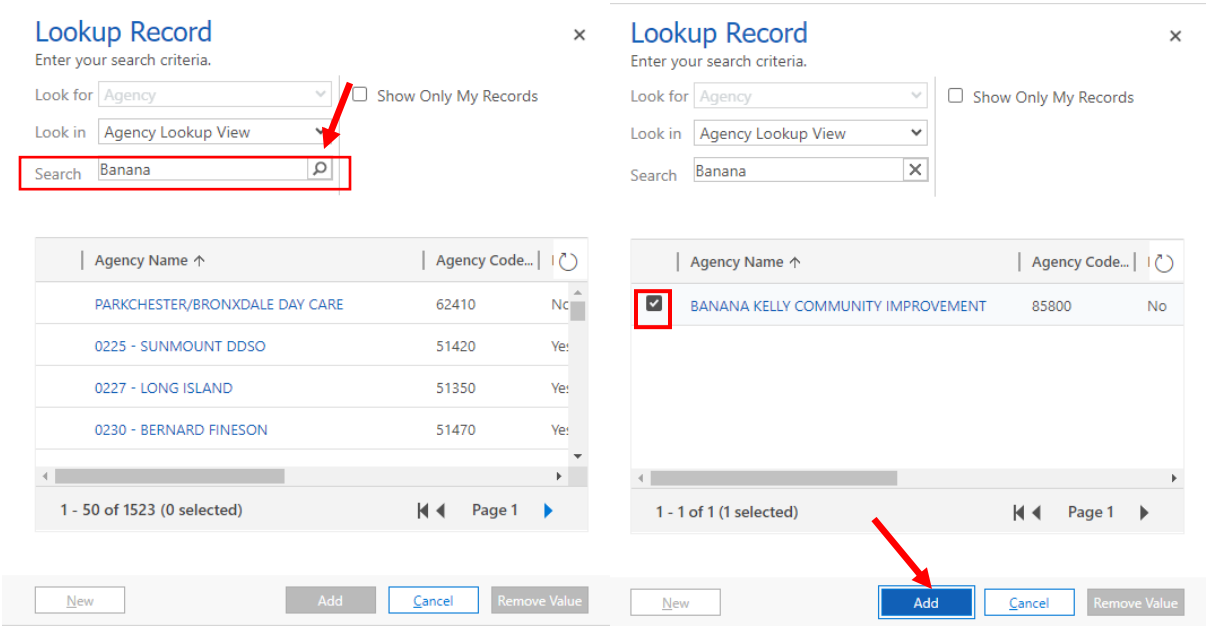


The *Annual Number of Service Units Requested* field **may not** be required since some *Service Types* **do not** require the entry of service units. If this field is not required, it will be locked for editing. When *Increase Service Amount* or *Reduce Service Amount* is checked the *Annual Number of Service Units Requested* **must** be entered by the user (if the *Service Type* requires the entry of service units). When *Increase Service Amount* or *Reduce Service Amount* are selected for a *Service Type* that does not require the entry of service units, the user will get an error message. When *Discontinue Service* is checked, the *Annual Number of Service Units Requested* will auto populate to Zero (0) and, the field will be locked and not editable.

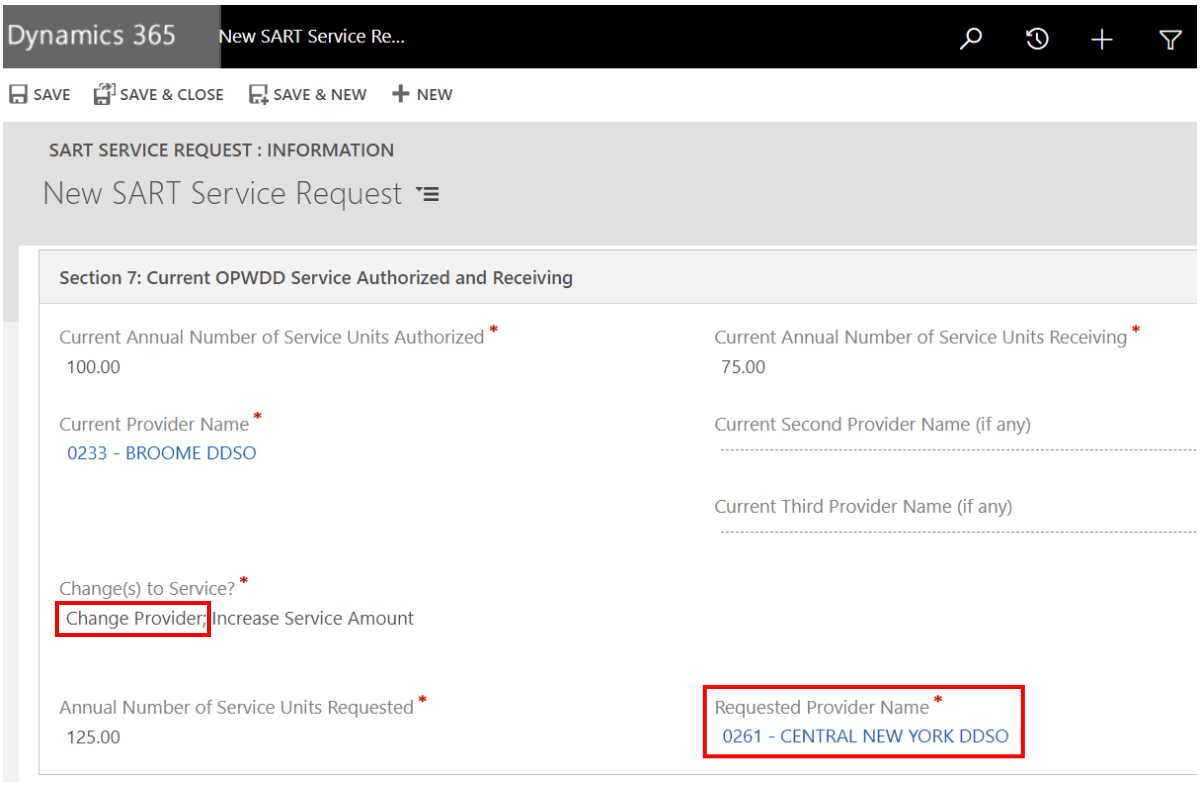
To find the person's *Current Provider*, hover over the field to display the search icon (magnifying glass). If the desired provider does not display in the provider options

displayed, click the Look Up More Records hyperlink. The Lookup Record window will open.

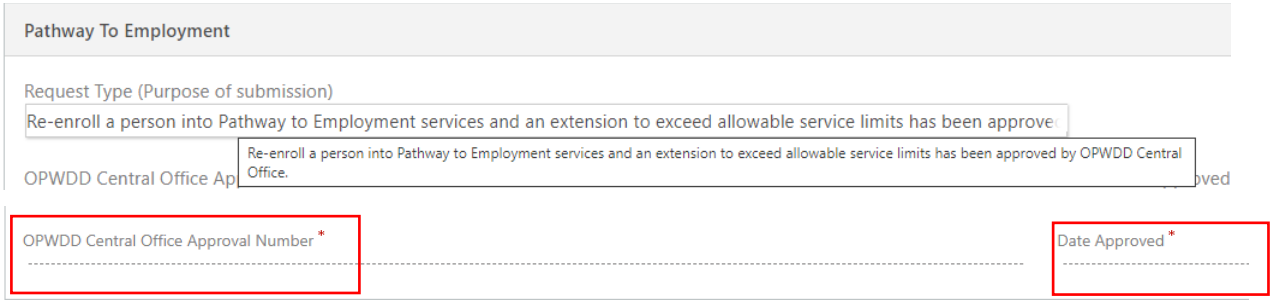
Enter the provider's name in the *Search* box and click the search icon (magnifying glass). Find the correct provider and check the box next to the provider's name. Then click *Add*. If multiple providers need to be added, repeat these steps to enter information within the *Current Second Provider Name (if any)* and *Current Third Provider (if any)* fields.



If *Change Provider* or *Add Provider* is checked, select the provider in the *Requested Provider Name* field.



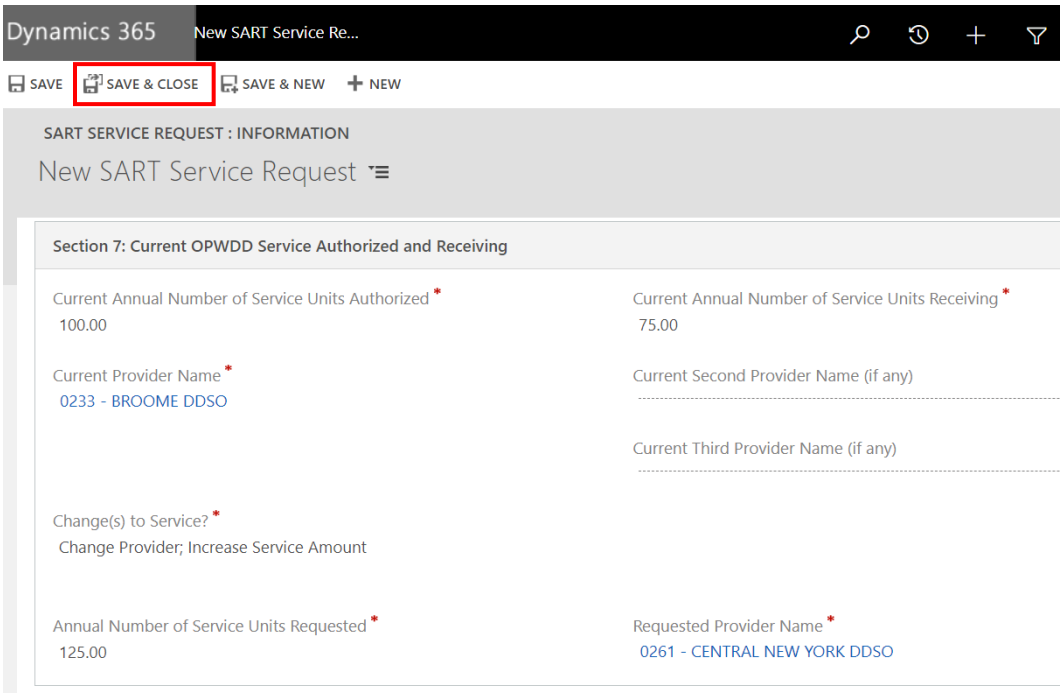
There is one *Service Type* where only three (3) options are allowed for the *Change(s) to Service* field, that is Pathway to Employment. The only allowable *Change(s) to Service* options are: *No Change*, *Change Provider*, or *Discontinue Service*. An additional *Pathway to Employment* sub-section displays. If the *Request Type (Purpose of submission)* field is completed with *Re-enroll a person into Pathway to Employment services and an extension to exceed allowable services limits has been approved by OPWDD Central Office* is selected, two additional fields will need to be completed.



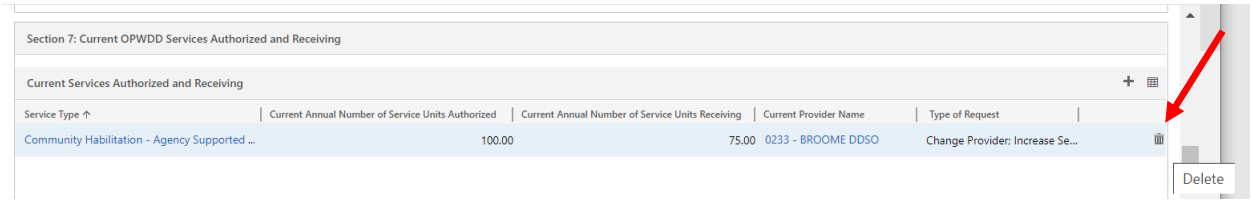
Once information has been entered into all required fields, click *Save & Close*. The window closes and the user returns to the main SART window. If necessary scroll to *Section 7* to continue working in that section.

Only one service can be entered at a time. A new entry **must** be created for each service. To add more services, click the **+** icon to open another *New SART Service*

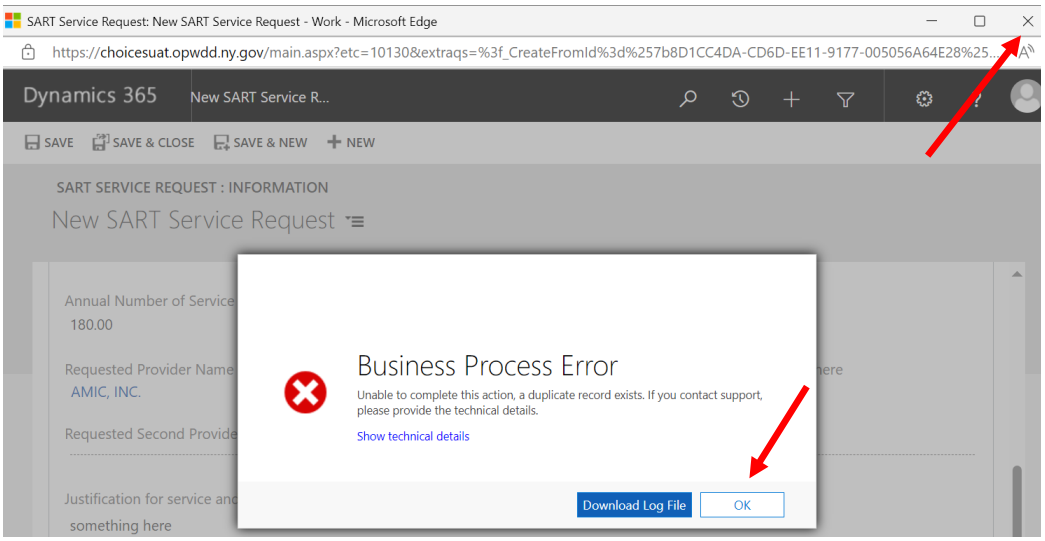
Request window, enter the applicable information, click *Save & Close*, and repeat as necessary to add all applicable services.



A service request can be deleted by hovering over the *Service Type* to highlight the desired row in blue, then the delete icon (garbage can) will display. Click the delete icon so that the service request no longer displays.

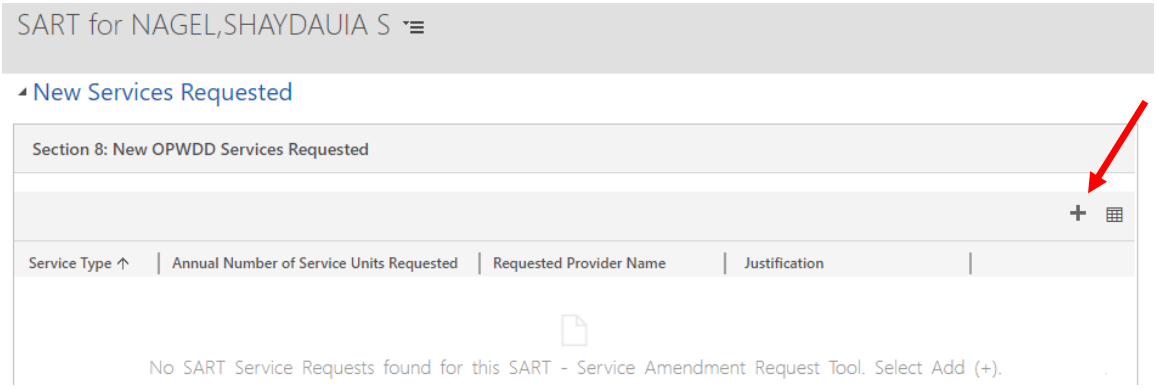


A user cannot add the same *Service Type* more than once. The user will receive a *Business Process Error* pop-up. Click *OK* on the *Business Process Error* pop-up and edit the information as applicable or if the service request has not been saved, close the *New SART Service Request* pop-up window by clicking the *X*.



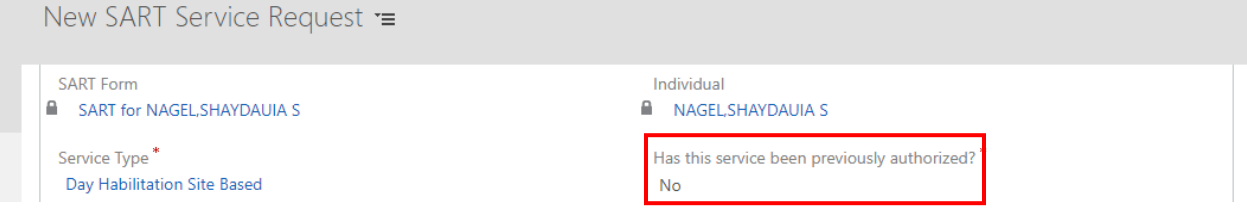
Section 8 – New OPWDD Services Requested

Click the **+** icon to open a new service request.

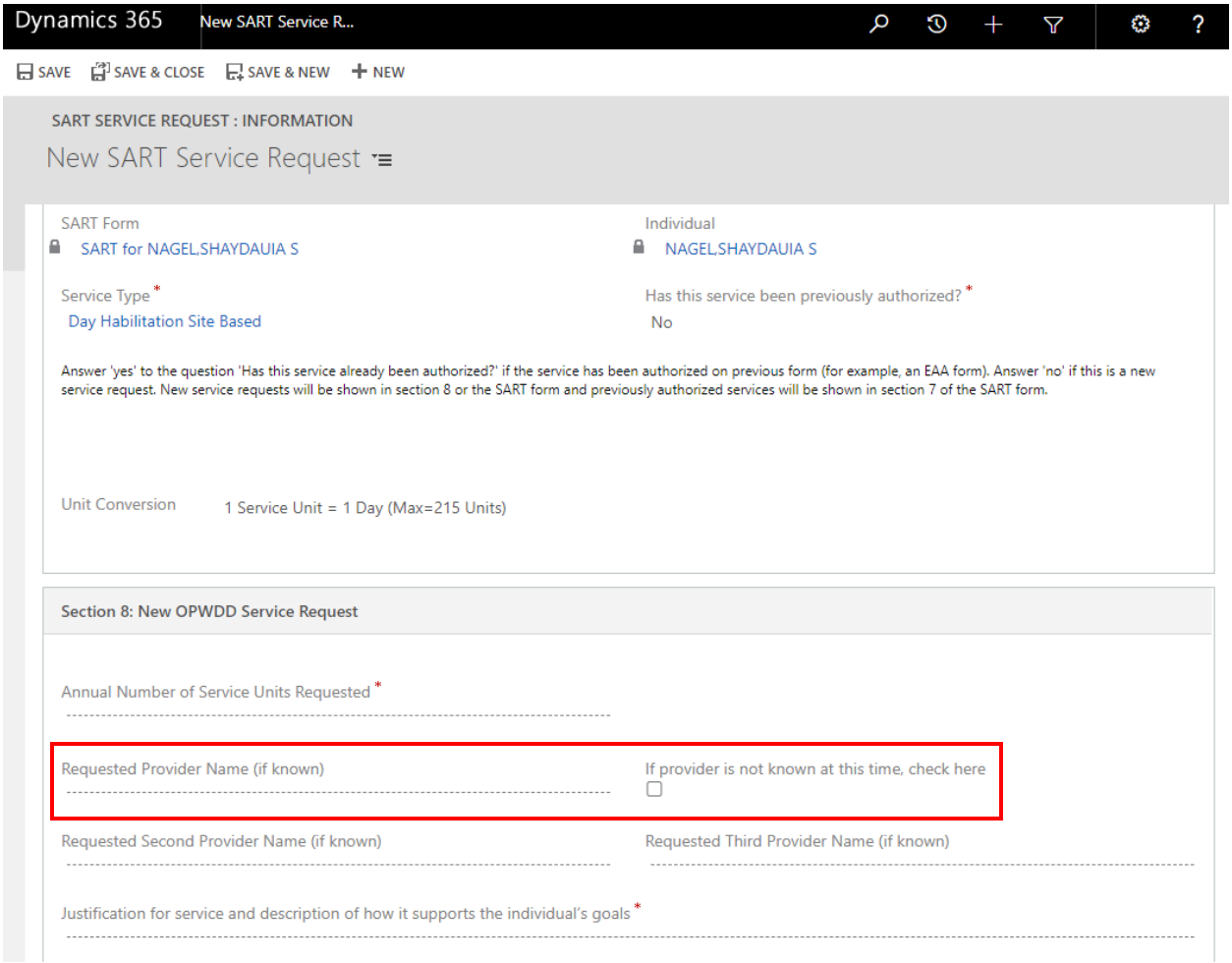


The *New SART Service Request* window opens. Maximize the window for ease of use. Begin with adding a service the person is requesting (i.e., not currently authorize for) in the *Service Type* field. Click the search icon (magnifying glass) to open the *Service Type* list. If the *Service Type* is not visible, scroll down, and if necessary, click *Look Up More Records* to open the Lookup Record window to display the full list of *Service Types*. See instructions provided above in *Section 7 – Current OPWDD Services Authorized and Receiving* for how to use the *Service Type Look Up Records* window.

Once the *Service Type* displays, select *No* as the answer to *Has this service been previously authorized?* The answer **must** be *No* because *Section 8* is only used to enter service requests for new services that the person is not currently authorized for. Once *No* is selected, Section 8 of the *New SART Service Request* window displays.



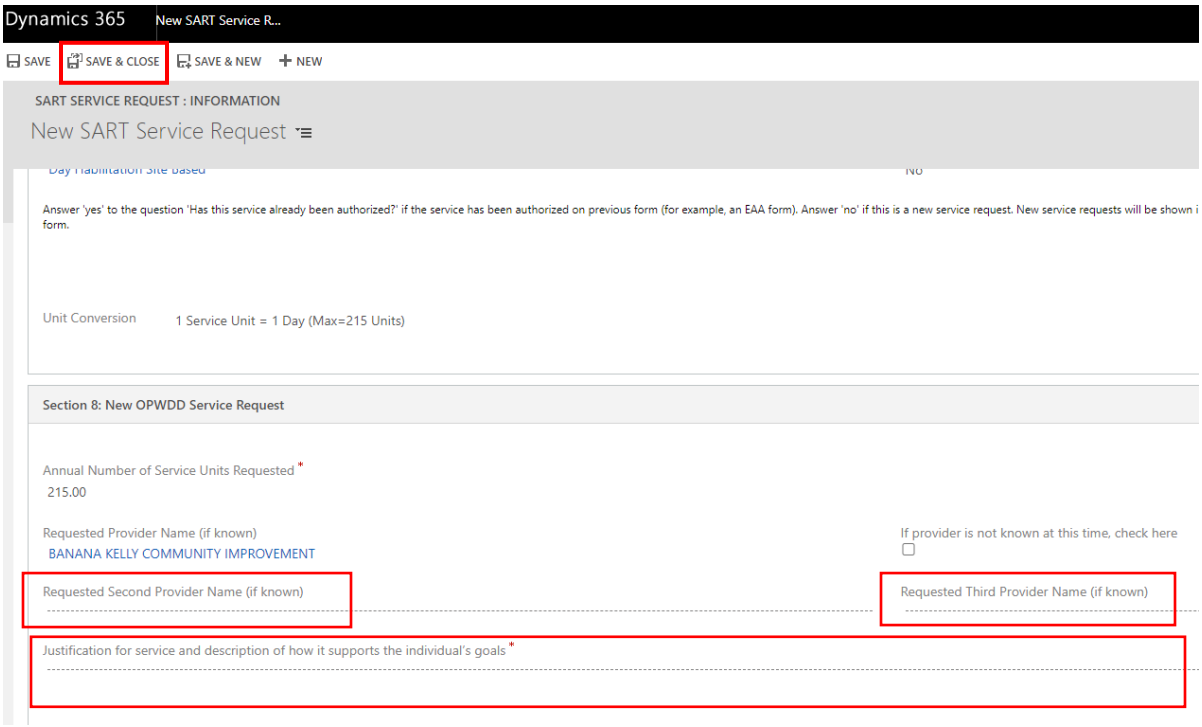
If the *Service Type* requires the entry of *Annual Number of Service Units Requested*, service units **must** be entered in this field. Select a provider in the *Requested Provider Name (if known).* If the provider is not known, check the *If provider is not known at this time, check here* box.



If the Provider is known, then hover over the field to display the search icon (magnifying glass). If the desired provider does not display in the provider options displayed, click the Look Up More Records hyperlink. The Lookup Record window will open. See instructions above in *Section 7 – Current OPWDD Services Authorized and Receiving* for how to use the *Provider Lookup Record* window.

If multiple providers need to be added, repeat the above steps to enter information within the *Requested Second Provider Name (if known)* and *Requested Third Provider*

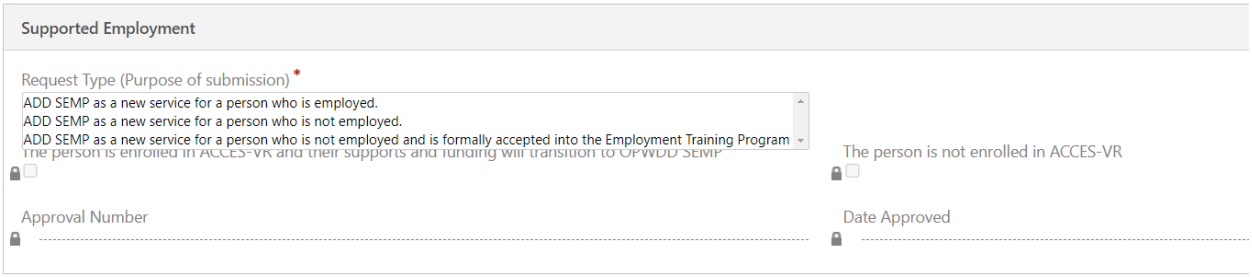
(if known) fields. Enter information into the *Justification for services and description of how it supports the individual's goals*. Then click *Save & Close*.



The *New SART Service Request* window closes and the user returns to the main SART window. If necessary, scroll back to *Section 8* to continue working in that section.

Only one service can be entered at a time. A new entry **must** be created for each service. To add more services, click the **+** icon to open another *New SART Service Request* window, enter the applicable information, click *Save & Close*, and repeat as necessary to add all applicable services.

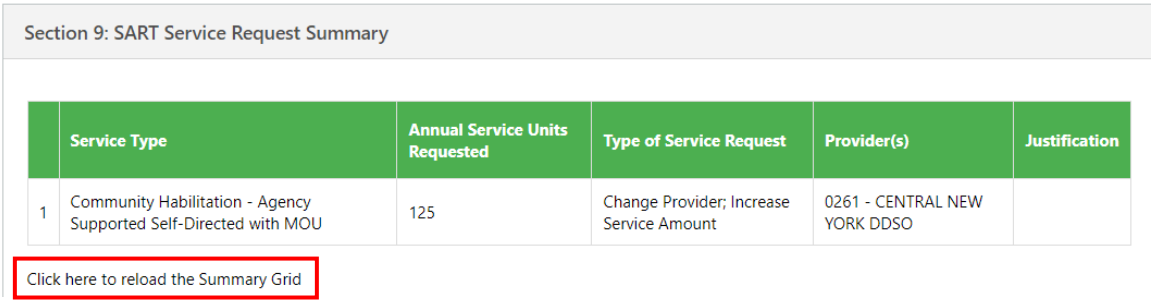
An additional sub-section or fields within *Section 8* displays when authorization is being requested for Pathway to Employment, Self-Direction with Budget Authority, Supplemental Day Habilitation, and Supported Employment services. Required fields are marked with a red asterisk (*). If a required field is not completed, an error message will display.



If the user needs to delete a service request, follow the same instructions provided above in *Section 7* for how to delete a service request row.

Section 9 – SART Service Request Summary

Section 9 will display a summary grid of service requests entered in *Section 7 – Current OPWDD Services Authorized and Receiving* and *Section 8 – New OPWDD Services Requested* above. All service requests entered may or may not display initially. If all service requests do not display, click the, *Click here to reload the Summary Grid* link.

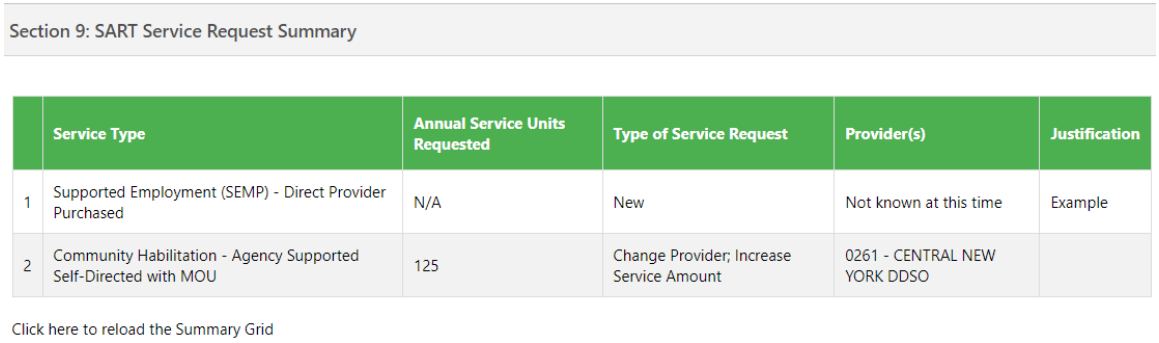


Section 9: SART Service Request Summary

	Service Type	Annual Service Units Requested	Type of Service Request	Provider(s)	Justification
1	Community Habilitation - Agency Supported Self-Directed with MOU	125	Change Provider; Increase Service Amount	0261 - CENTRAL NEW YORK DDSO	

Click here to reload the Summary Grid

The grid will reload with all service requests.



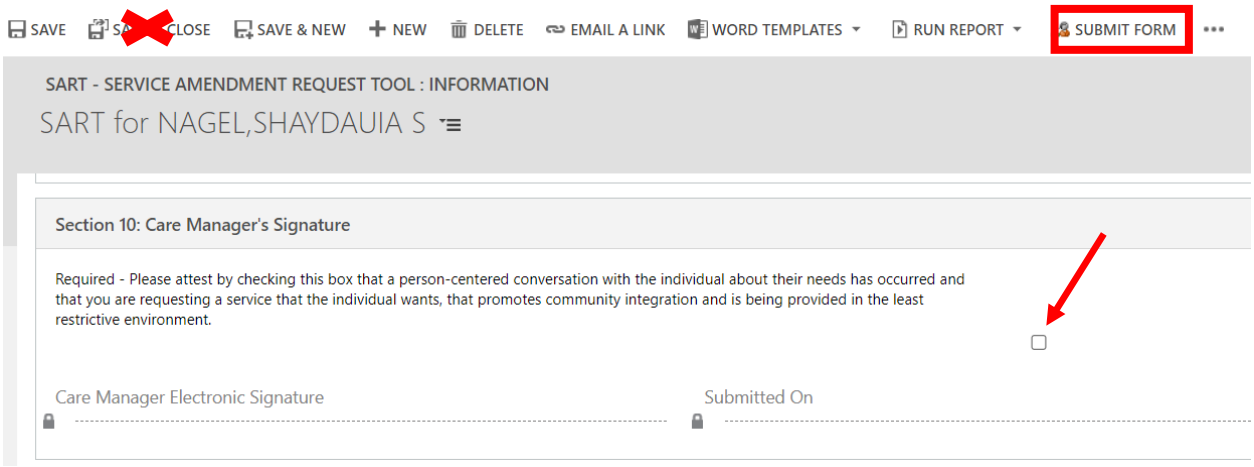
Section 9: SART Service Request Summary

	Service Type	Annual Service Units Requested	Type of Service Request	Provider(s)	Justification
1	Supported Employment (SEMP) - Direct Provider Purchased	N/A	New	Not known at this time	Example
2	Community Habilitation - Agency Supported Self-Directed with MOU	125	Change Provider; Increase Service Amount	0261 - CENTRAL NEW YORK DDSO	

Click here to reload the Summary Grid

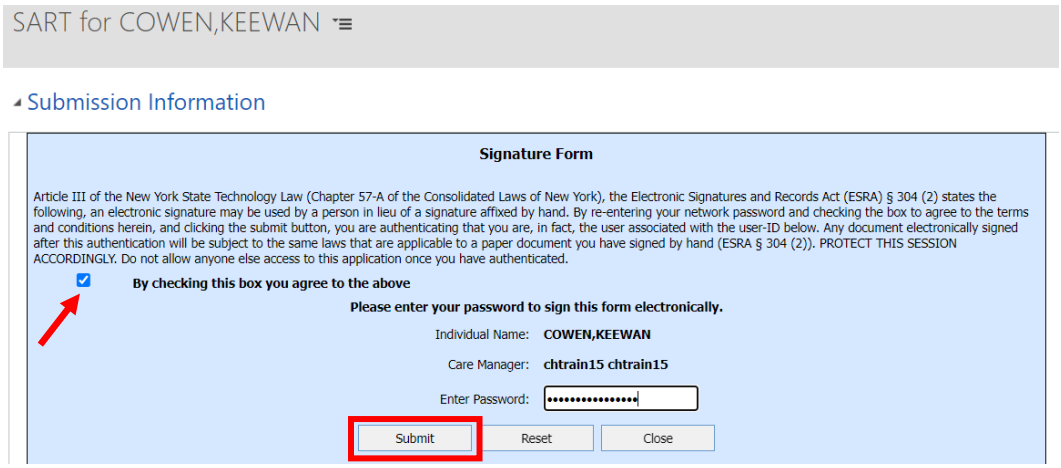
Section 10 – Care Manager's Signature

After a Care Manager has reviewed the entire SART, they **must** check off the attestation box and then click the *Submit Form* button. *Save & Close* **does not** submit the SART. Rather, the SART will *Save* and the form closes.



Submitting a SART

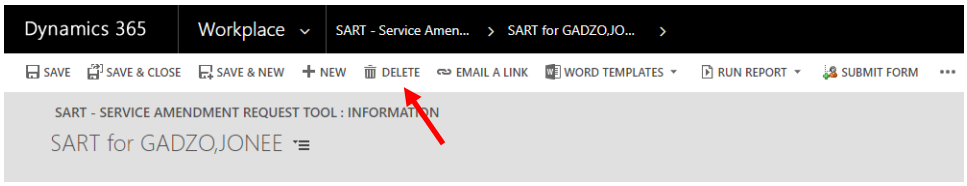
Care Managers **must** click *Submit Form* after checking the attestation box on the main SART window to apply their electronic signature, signature date, and submission date onto the form. After *Submit Form* is clicked, the *Signature Form* window displays. The user **must** check *By checking this box you agree to the above*, then add their CHOICES password, and click *Submit*.



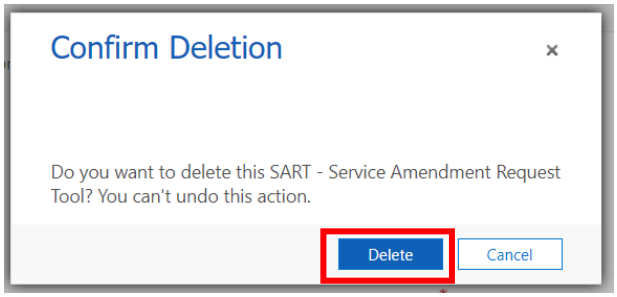
The SART *Status Reason* changes to *Submitted*, and the SART main window closes.

Deleting a SART

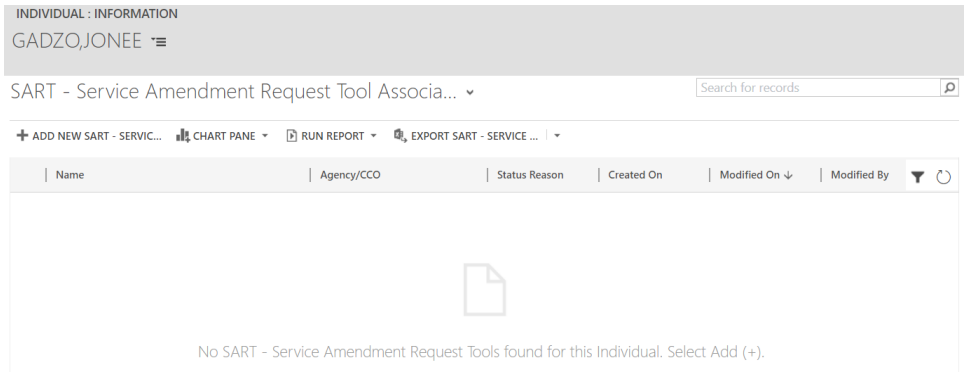
If an *Active* SART has a *Status Reason* of *Saved* and it has never been *Submitted*, the SART can be deleted if no longer needed. To delete a SART, click *Delete*.



A dialog box will display to confirm if the user would like to delete the SART. Click *Delete* to delete the SART or *Cancel* if deletion is not necessary.



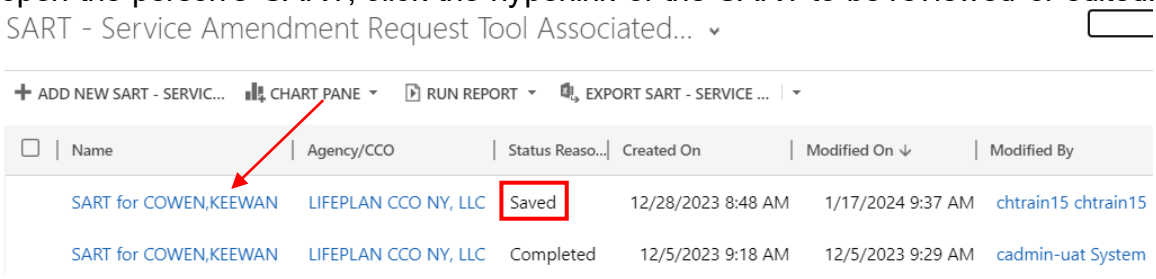
The SART will no longer display in any System Views or on the person's *SART – Service Amendment Request Tools* Form Section of their CHOICES record.



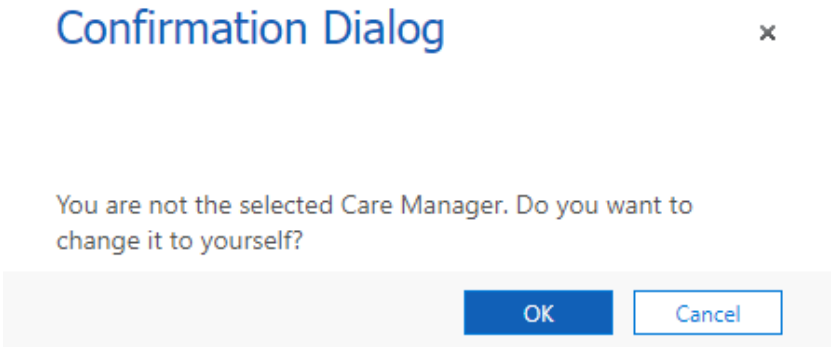
Reviewing or Editing another User's SART

If the SART has the *Status Reason* of *Saved*, it can be reviewed or edited by CCO staff other than the original user whose information auto populated onto the SART. The other CCO staff can open a person's SART from person's *SART – Service Amendment Request Tools* Form Section within their CHOICES record. See instructions above in *Creating a SART* for how to navigate to a person's *SART – Service Amendment Request Tools* Form Section.

To open the person's SART, click the hyperlink of the SART to be reviewed or edited.



Once the new CCO staff has opened the desired SART, a dialog box displays asking the user if they want their information to be added onto the person's SART. The user will click *OK* if they want their information to be added and if they want to edit the SART. The user will click *Cancel* if they do not want their information added and only want to view the information.



Subsequent SARTs

For subsequent SARTs, information that was manually entered at some point either on an initial or previous SART for *Section 1- Legal Guardian Information*, *Section 2 – Care Manager's Information*, *Section 4 – Education Information*, and *Section 5 – Non-OPWDD Services and Natural Supports* will auto populate the information previously entered by a CCO user from the most recent *Completed* SART on the person's record. The information auto populated will be editable. CCO staff **must** review the information auto populated onto the subsequent SART and update this information accordingly.

Differences between Initial and Subsequent SARTs for Section 7

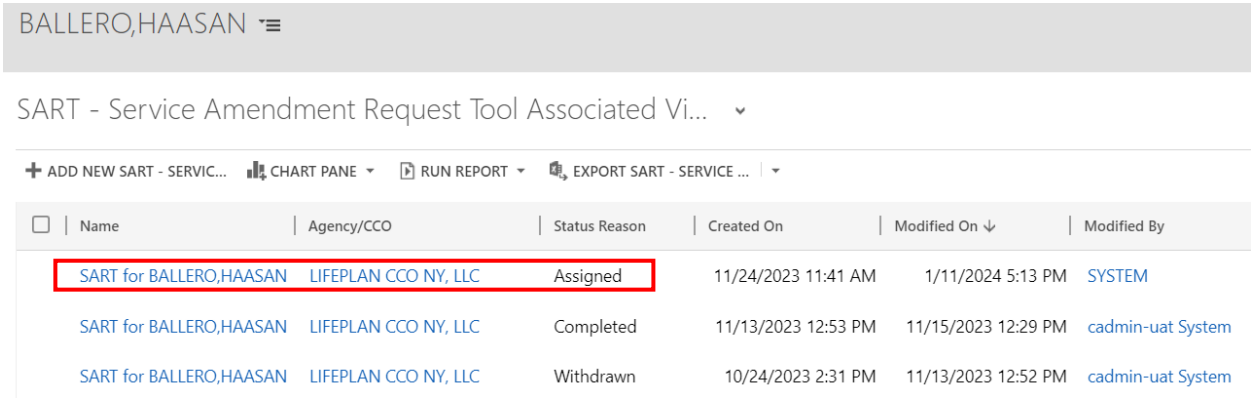
For *Section 7 – OPWDD Services Authorized and Receiving* of subsequent SARTs, the *Service Type* and the *Current Annual Number of Service Units Authorized* fields will auto populate from the person's most recent *Completed* SART. These two auto populated fields **are not** editable. Users **must** continue to enter the *Current Annual Number of Service Units Receiving*, *Current Provider Name*, and *Change(s) to Service*.

Necessary changes to a *Service Type* **must** be entered in the applicable field(s). A *Service Type* row **cannot** be deleted on a subsequent SART. Rather, the user **must** request *Discontinue Service* in the *Change(s) to Service* field for the *Service Type*.

If a *Service Type* is missing from *Section 7* after an initial SART has been completed, the user **must** enter the *Service Type* as a net new service request in *Section 8 – New OPWDD Services Requested* as the SART does not recognize the *Service Type* as a currently authorized service in *Section 7*.

Limit of One Active SART

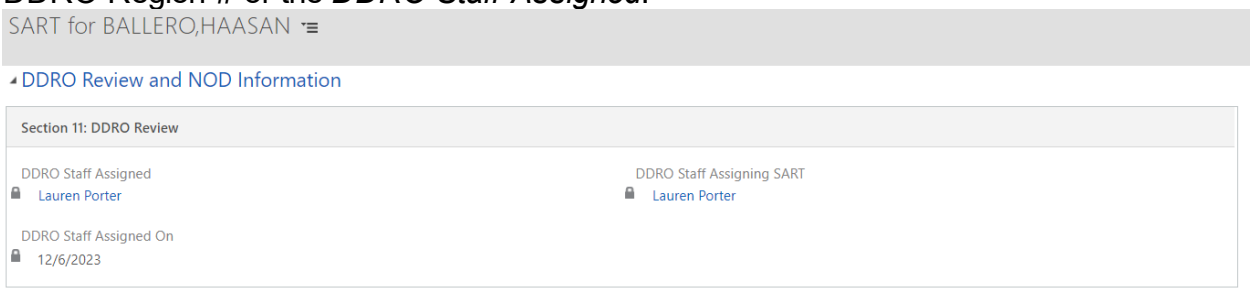
A person can only have **one** *Active* SART within the CHOICES system at any given time. If the person has a *Saved*, *Submitted, Assigned*, or *Returned* SART on record, another SART **cannot** be created. In this example below, another SART cannot be created as the person already has an Active SART with a *Status Reason* of *Assigned*.



DDRO Review and Completion

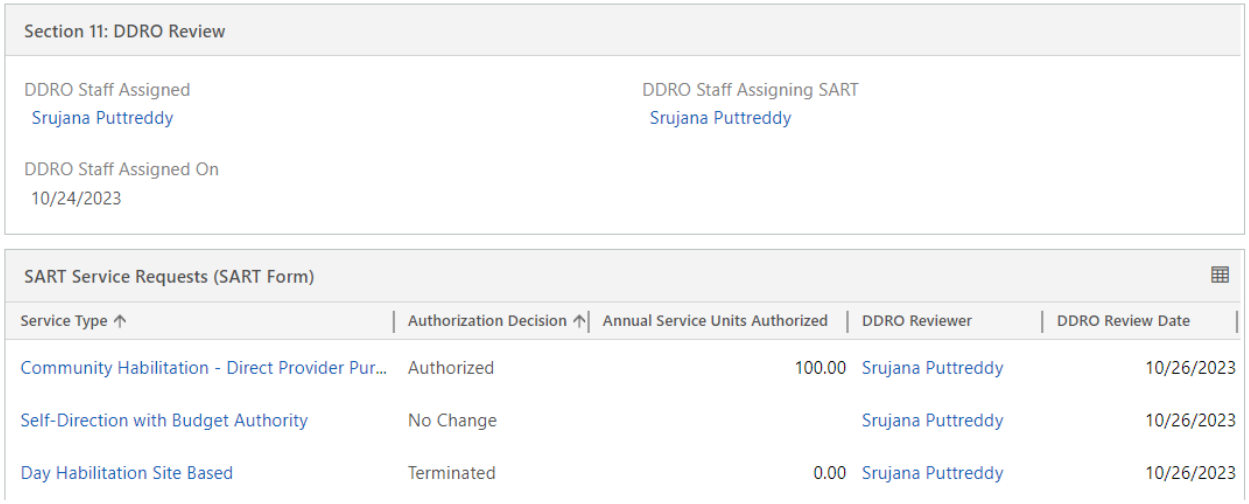
DDRO Assignment

After a SART has been *Submitted*, it is *Assigned* to DDRO staff. The CCO user who *Submitted* the SART will receive an automatic email message with the name and DDRO Region # of the *DDRO Staff Assigned*.



Section 11 – DDRO Review

After the DDRO user has completed work in *Section 12 – Assessment Verifications* and if/when they are satisfied with the information submitted or re-submitted on the SART, they select the *Authorization Decision* and enter the *Annual Service Units Authorized* (if required) for each service request entered by the CCO user in *Section 7 – Current OPWDD Services Authorized and Receiving* and *Section 8 – New OPWDD Services Requested* in *Section 11 – DDRO Review.*



The DDRO will *Return* a SART if they are unable to complete their work within *Section 11* without additional information. See *Returned SART* below for further instructions.

The *Authorization Decision* options the DDRO user will select from if they agree with the service request as submitted or are issuing a different decision as a result of the DDRO review process are:

- For *Section 7 – Current OPWDD Services Authorized and Receiving* service requests:

- *Increased* – DDRO has authorized an increase in *Annual Service Units Authorized* for the *Service Type* from the amount the person was previously authorized for (i.e., number entered by CCO user in *Current Annual Number of Service Units Authorized* field). DDRO user can enter an amount in *Annual Service Units Authorized* field that is less than the amount the CCO user requested in the *Annual Number of Service Units Requested* field.
- *No Change* – DDRO has re-authorized the same amount of *Annual Service Units Authorized* that the person was previously authorized for (i.e., number entered by CCO user in *Current Annual Number of Service Units Authorized* field). Selected when person has requested to only *Add Provider* or *Change Provider* as these requests do not impact the number of *Annual Service Units Authorized*.
- *Reduced* – DDRO has reduced the amount of *Annual Service Units Authorized* for the *Service Type* than the amount the person was previously authorized for (i.e., number entered by CCO user in *Current Annual Number of Service Units Authorized* field).
- *Terminated* – DDRO has terminated the person's authorization for the *Service Type*. *Annual Service Units Authorized* displays as Zero (0).

Service Type	Authorization Decision	Annual Service Units Authorized
Community Habilitation - Direct Provider Purchased	No Change	100.00
Day Habilitation Site Based	Increased	75.00
Prevocational Services – Site Based	Reduced	50.00
Family Education and Training (FET)	Terminated	0.00

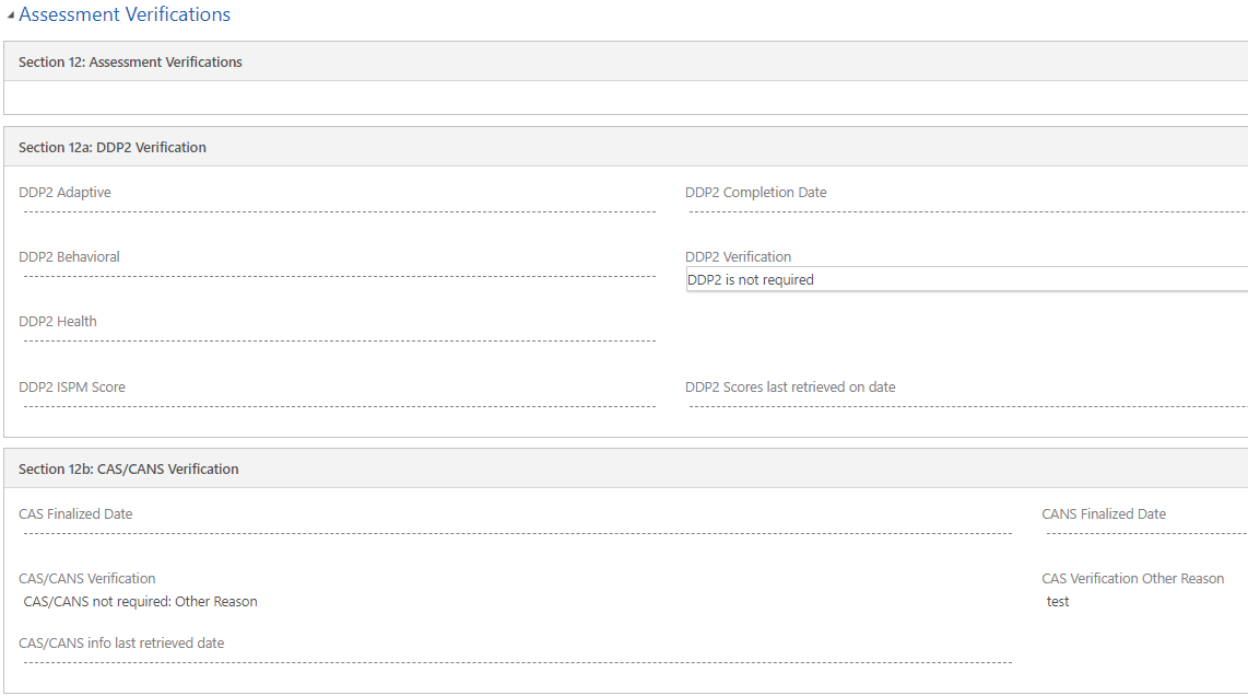
- For *Section 8 – New OPWDD Services Requested* service requests:
  - *Authorized* – DDRO has authorized *Service Type* for amount entered in *Annual Service Units Authorized*. DDRO user can enter an amount in *Annual Service Units Authorized* field that is less than the amount the CCO user requested in the *Annual Number of Service Units Requested* field.
  - *Not Authorized* – DDRO has denied *Service Type* requested. *Annual Service Units Authorized* displays as Zero (0).

Service Type	Authorization Decision	Annual Service Units Authorized
Pathway to Employment	Authorized	278.00
Day Habilitation Site Based - Supplemental	Not Authorized	0.00

The *DDRO Reviewer* and *DDRO Review Date* will display. Dates that were entered on the Service Authorization Notice of Decision (NOD) sent to the CCO display in the *NOD Information* section as applicable.

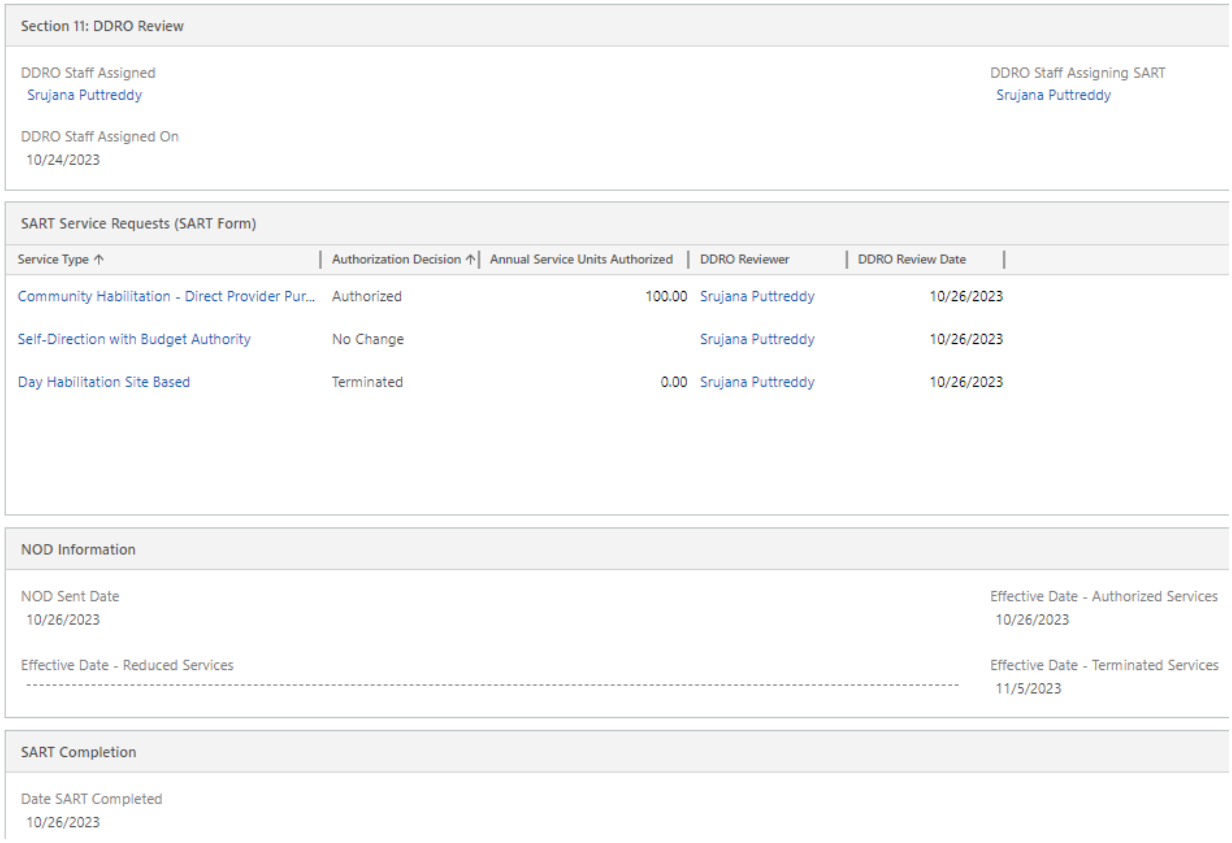
Section 12 – Assessment Verifications

DDRO users will begin their work in *Section 12 – Assessment Verifications*. The person's Developmental Disabilities Profile 2 (DDP2) and CAS/CANS information is imported onto the SART from their TABS/CHOICES record by the DDRO user. Then, the DDRO user will select the applicable option in the *DDP2 Verification* and *CAS/CANS Verification* fields before they scroll up to *Section 11 – DDRO Review* to continue their work.



Completed SART

After the DDRO user has reviewed their work in *Section 11 – DDRO* and *Section 12 – Assessment Verifications* they will *Complete* the SART. Then the completion date will display, and the form will become *Inactive*. A *Completed* SART cannot be re-activated for further editing. Any edits needed once a SART has been *Completed* requires the creation and submission of a new SART.



Section 11: DDRO Review

DDRO Staff Assigned
Srujana Puttreddy

DDRO Staff Assigning SART
Srujana Puttreddy

DDRO Staff Assigned On
10/24/2023

SART Service Requests (SART Form)

Service Type	Authorization Decision	Annual Service Units Authorized	DDRO Reviewer	DDRO Review Date
Community Habilitation - Direct Provider Pur...	Authorized	100.00	Srujana Puttreddy	10/26/2023
Self-Direction with Budget Authority	No Change		Srujana Puttreddy	10/26/2023
Day Habilitation Site Based	Terminated	0.00	Srujana Puttreddy	10/26/2023

NOD Information

NOD Sent Date
10/26/2023

Effective Date - Authorized Services
10/26/2023

Effective Date - Reduced Services

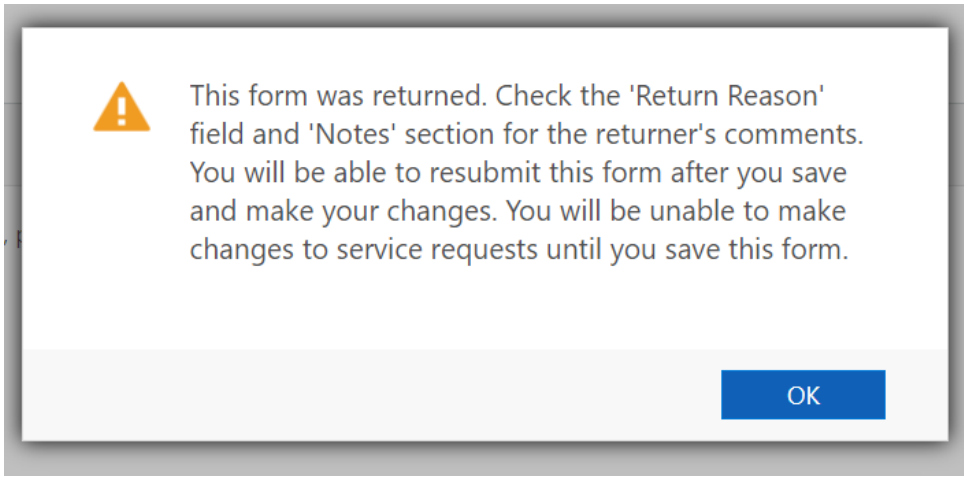
Effective Date - Terminated Services
11/5/2023

SART Completion

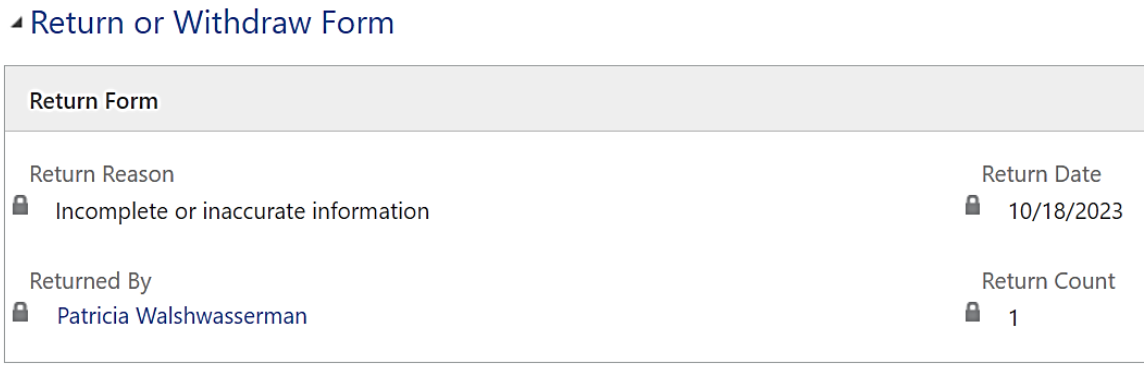
Date SART Completed
10/26/2023

Returned SART

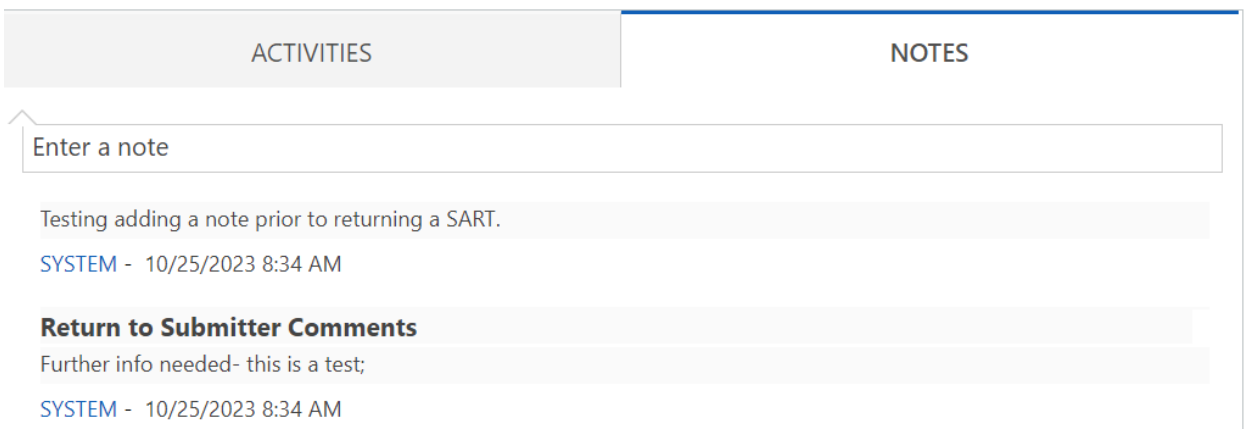
The DDRO can *Return* a SART. Navigate to the person's *Returned* SART. Click the link of the *Returned* SART to open it. Once the *Returned* SART is opened a message will display, read the message then click OK.



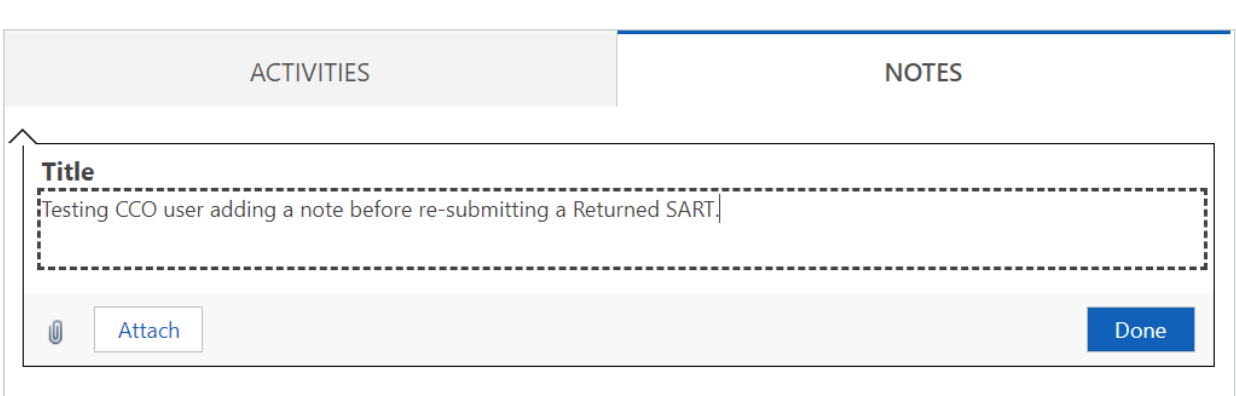
Scroll down to the *Return or Withdraw Form* section. The *Return Reason*, *Return Date*, who it was *Returned By*, and *Return Count* (number of times it has been *Returned*) displays.



Go to the *Notes* section to check if the DDRO entered any information about the *Returned* SART.



CCO users can enter text in the *Notes* section by clicking inside the field. Enter text then, click Done. *Attach* button has no functionality. Please ignore this button. *Notes* are visible to all users who have access to the particular SART.

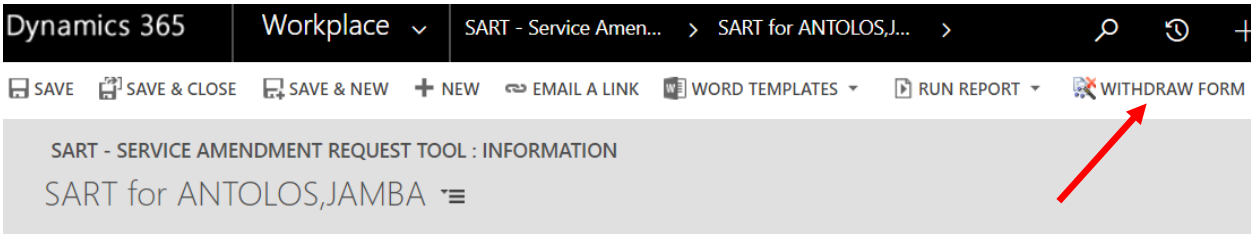


Once the user has begun to work on *Returned* SART, click Save. Clicking *Save* will change the *Status Reason* to *Saved*. The *Saved Status Reason* indicates to all users that the *Returned* SART is being worked on. The CCO user **must** *Submit* the SART to the DDRO after it has been *Returned*. Follow instructions provided above in *Section 10 – Care Manager's Signature* and *Submitting a SART* to sign and

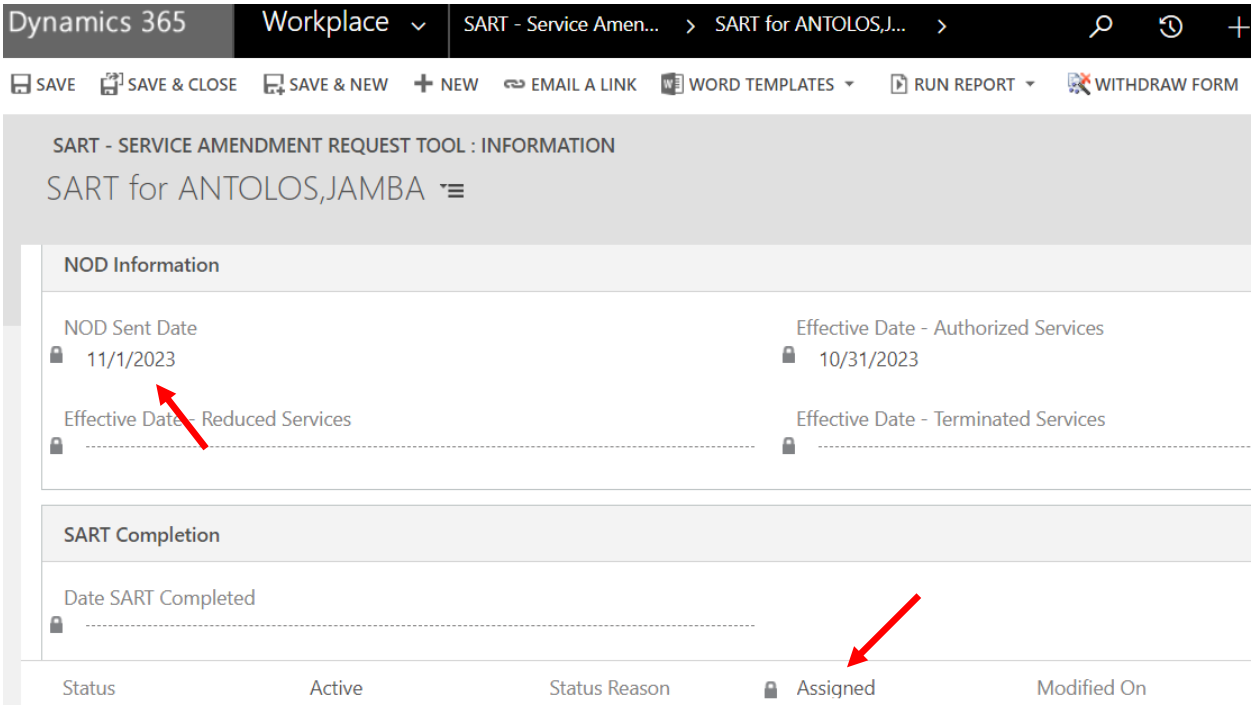
Submit the SART. The form closes and is given a *Status Reason* of *Assigned* as it is sent back to the DDRO.

Withdrawn SART

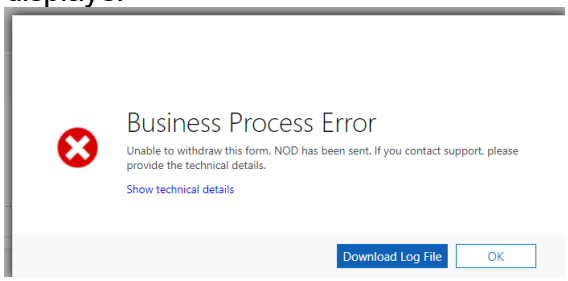
CCO users can *Withdraw* a SART after it has been *Submitted*. Clicking *Withdraw Form* withdraws the SART and closes the SART window.



The *Status Reason* changes to *Withdrawn* and the *Status* changes to *Inactive*. A *Withdrawn* SART cannot be re-activated for further editing or submission. The CCO user **must** create and submit a new SART. A SART cannot be *Withdrawn* once a DDRO user has entered a date in the *NOD Sent Date* field even if the DDRO has not *Completed* the SART yet (i.e., *Status Reason* is *Assigned*).

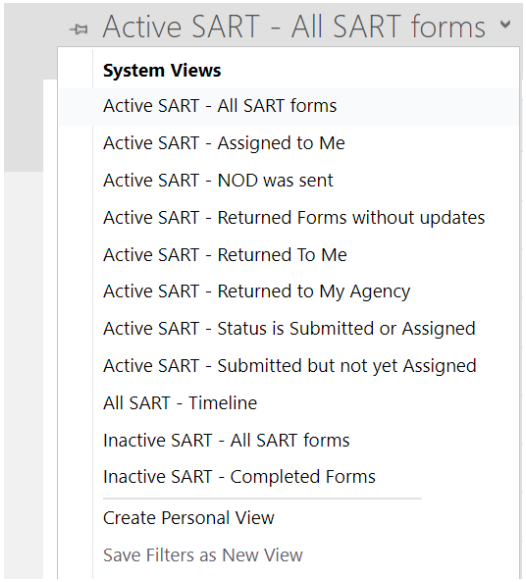


If a CCO user attempts to *Withdraw* a SART with an *NOD Sent Date*, an error displays.

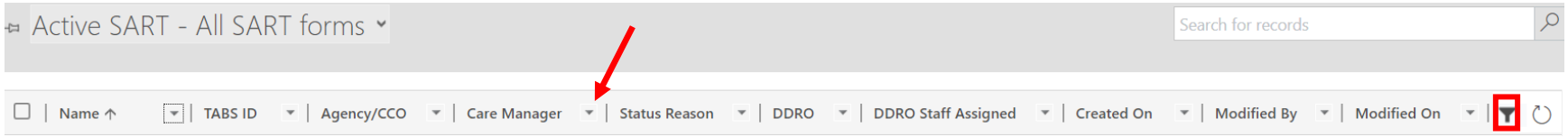


SART System Views – Monitoring and Tracking SART Activity

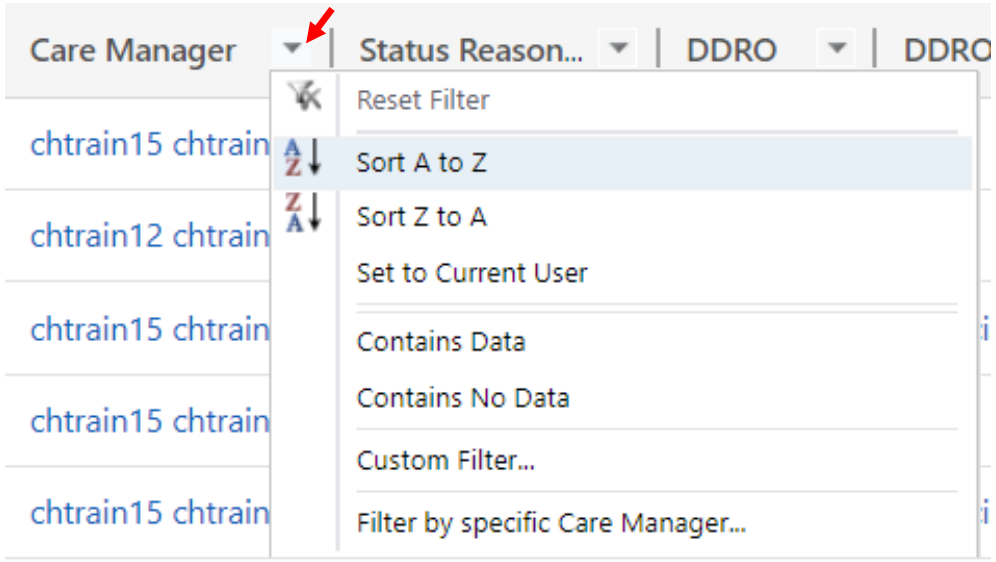
This is a list of all the System Views available to CCO staff who have access to the SART.



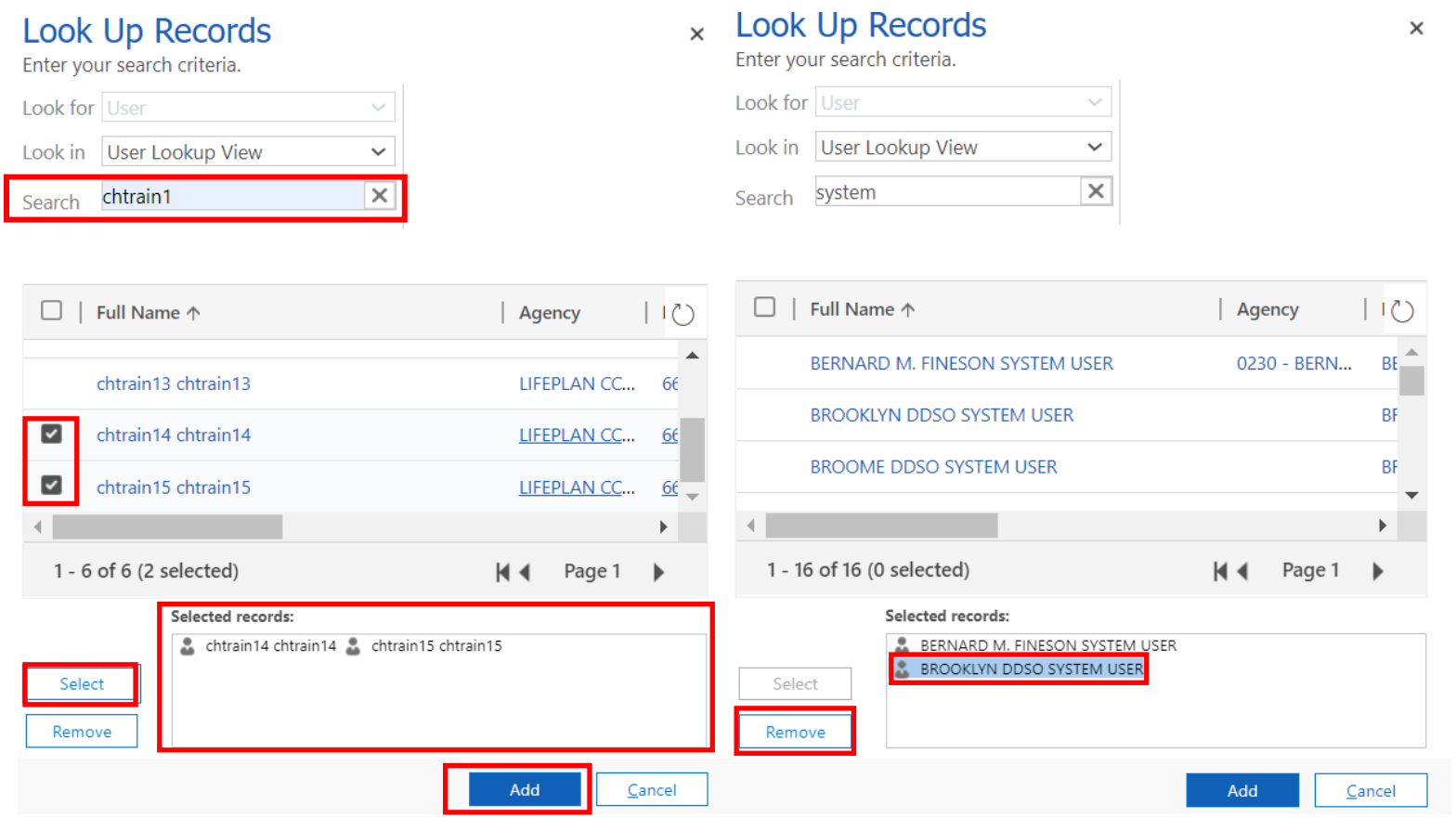
To filter a System View, click the filter icon (funnel). Down arrows then display next to the title of the column. Clicking the title of the column sorts the column from oldest to newest if the column contains dates or alphabetically from A to Z if the column contains text.



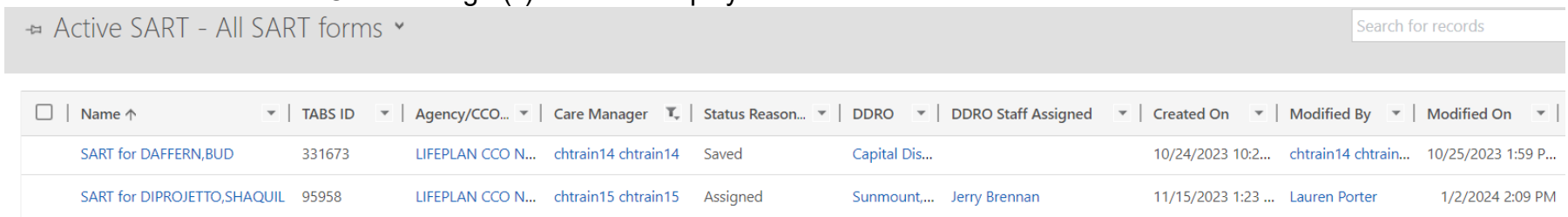
Click the down arrow. A menu of filter options to select from displays. To filter the Care Manager column to the current user logged in, click *Set to Current User*. A filter can be applied to another user or multiple users by clicking *Filter to specific Care Manager…*



Once *Filter to specific Care Manager…* has been clicked, the *Care Manager Look Up Records* window displays. The user can type the full name or partial name of the user(s) in the *Search* field or scroll down using the side bar to find the user(s) they are looking to filter the column to. Use of the side bar is not recommend given the large volume of Care Manager users available to select from within a CCO. Once the desired Care Manager(s) have been found, check the box to the right of the Care Manager's *Full Name*. Click *Select* to add the Care Manager(s) to the *Selected records* box. The selected Care Managers display in the *Selected records* box.



To remove a Care Manager displayed in the *Selected records* box, click the Care Manager's name in the *Selected records* box to highlight it in blue, then click *Remove*. Click *Add* to apply the filter. The user returns to the System View with SARTs filtered to the Care Manager(s) selected displayed.



To remove the filter, click *Reset Filter* in the filter menu (shown above).

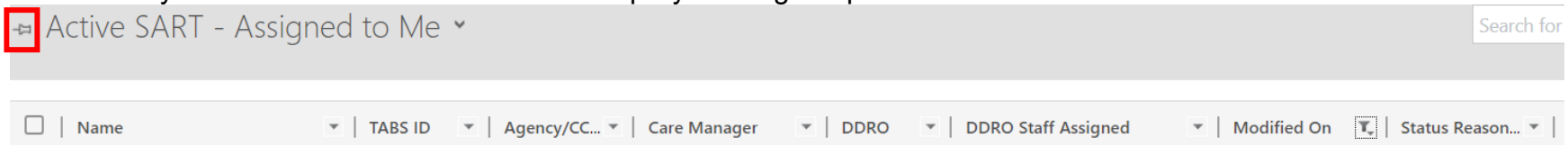
Additional information on Views can be found in the Navigating CHOICES User Guide.

Active SART – All SART Forms

Displays all *Assigned*, *Saved*, *Submitted*, or *Returned* SARTs created by all staff from the user's CCO display.

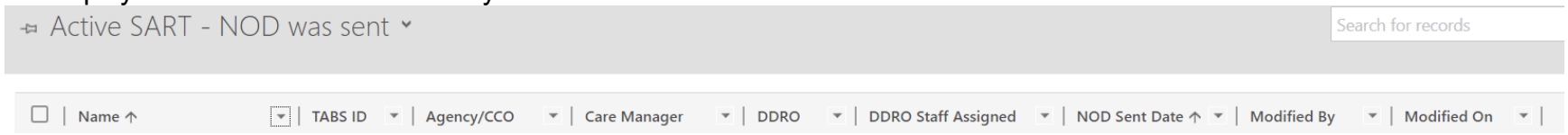
Active SART – Assigned to Me

All *Assigned*, *Saved*, *Submitted*, or *Returned* SARTs created by the user displays. *Assigned* SARTs include SARTs that have been *Submitted* after being *Returned*. Recommended default System View to display for Care Manager users. System View default view can be set-up by clicking the pin next to the name of the View.



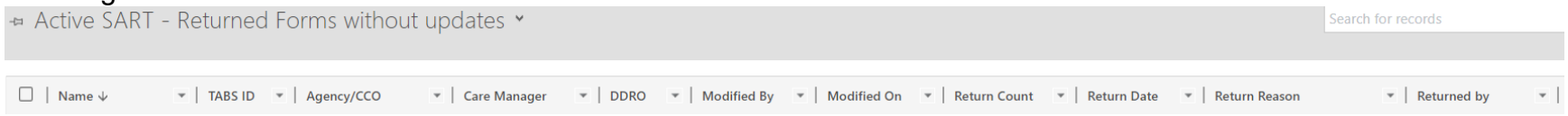
Active SART – NOD was Sent

All *Assigned* SARTs created by all staff from the user's CCO that have an NOD Sent Date displays. The SARTs displayed **cannot** be *Withdrawn* by a CCO user.



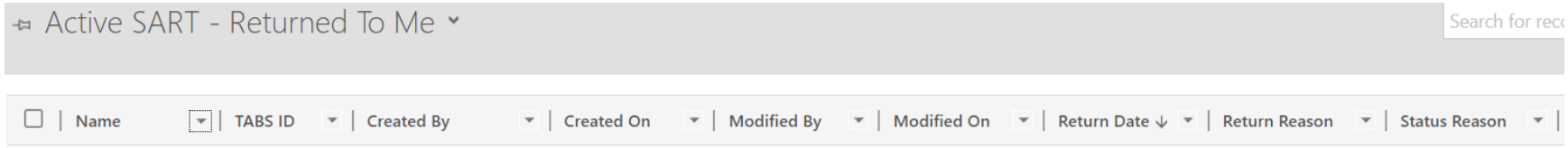
Active SART – Returned Forms without Updates

All *Returned* SARTs created by all staff from the user's CCO displays. These SARTs have not been worked on since being *Returned*.



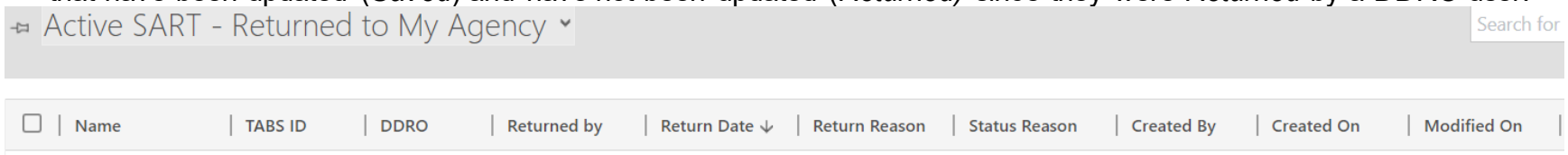
Active SART – Returned to Me

All *Saved* and *Returned* SARTs created by the user displays. The SARTs displayed include those that have been updated (*Saved*) and have not been updated (*Returned)* since they were *Returned* by a DDRO user.



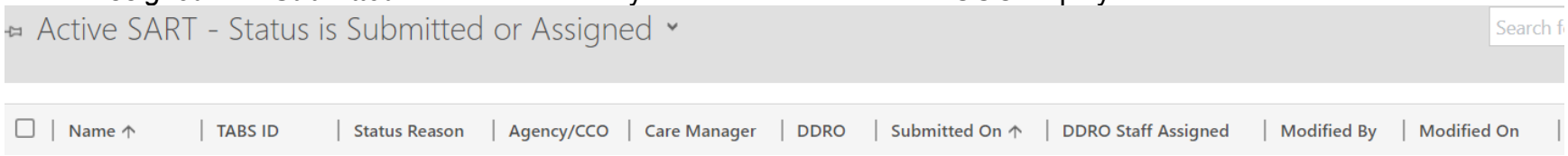
Active SART – Returned to My Agency

All *Saved* and *Returned* SARTs created by all staff from the user's CCO displays. The SARTs displayed include those that have been updated (*Saved*) and have not been updated (*Returned)* since they were *Returned* by a DDRO user.



Active SART – Status is Submitted or Assigned

All *Assigned* and *Submitted* SARTs created by all staff from the user's CCO displays.

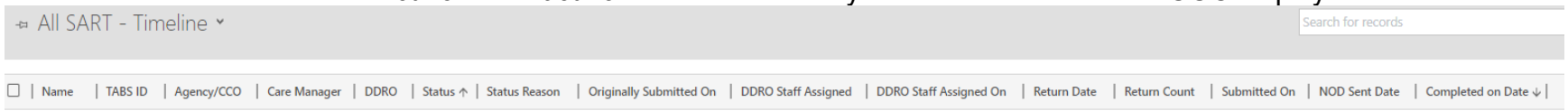


Active SART – Submitted but not yet Assigned

All *Submitted* SARTs created by all staff from the user's CCO displays.

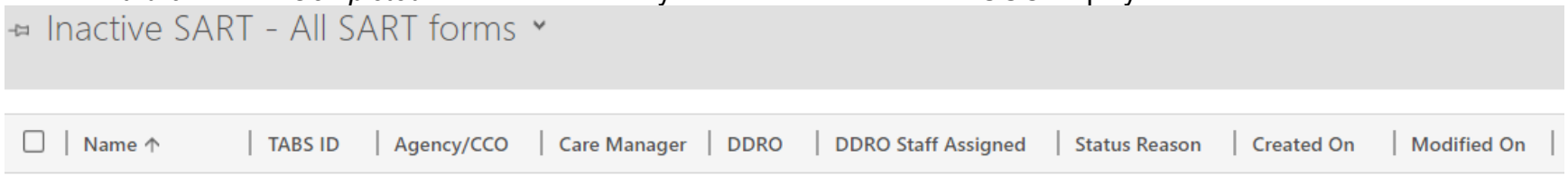
All SART – Timeline

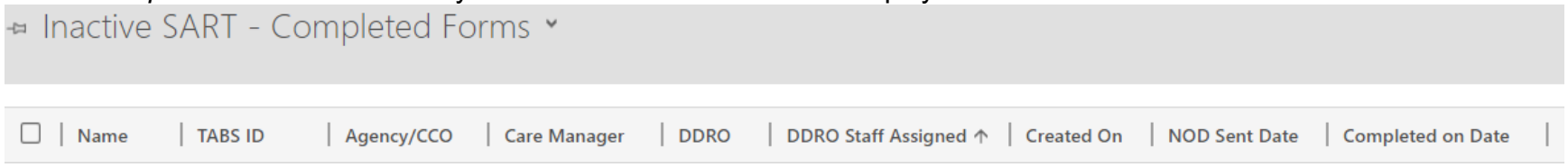
Timeline of actions for all *Active* and *Inactive* SARTs created by all staff from the user's CCO displays.



Inactive SART – All SART Forms

All *Withdrawn* and *Completed* SARTs created by all staff from the user's CCO displays.



Inactive SART – Completed Forms

All *Completed SARTs* created by all staff from the user's CCO displays.