How to Create a NEW DD Eligibility Enrollment (DDEE) Form in eXPRS
(updated 10/29/2019)

The DD Eligibility & Enrollment (DDEE) process previously utilized by CME staff has been updated in eXPRS to be more streamlined. With the transition to direct DD Eligibility entry into eXPRS & implementation of the eXPRS module for the Oregon Needs Assessment (ONA) process to generate a Level of Care (LOC), much of the information submitted on a DDEE form is no longer needed. This has enabled the DDEE form & process to be streamlined for easier use in eXPRS for both CDDP and Brokerage staff.

For full details on the ODDS policies & procedures for when creation/submission of a DDEE (0337) form is now needed, please see the DD Eligibility and Enrollment (DDEE/0337) Worker Guide available here:
http://www.dhs.state.or.us/policy/spd/transmit/ar/2019/ar19043.pdf

IMPORTANT INFORMATION:

• When eXPRS transitions to using the NEW streamlined DDEE (0337) form layout, CME users will not be able to copy/update existing (old layout) forms. **A NEW form in the NEW layout will need to be created.** Once a form in the new layout is created, those can be copied & updated with new enrollment information, as needed, in the future.

• The DD TAU will continue to process old layout DDEE (0337) forms submitted & in process at the time of the system update to the NEW form layout in eXPRS. Any forms in the old layout that were in draft status (ie: not yet submitted) at the time of the eXPRS system update will be deleted.

Users will need to be assigned the below user roles to do this DDEE (0337) form work:

• **CDDPs:**
  o CDDP Eligibility Enrollment Preparer
  o CDDP Eligibility Enrollment Processor

• **Brokerages:**
  o Brokerage Eligibility Enrollment Processor
To create a NEW DD Eligibility & Enrollment (0337) form in eXPRS:

1. Log into eXPRS. You will need to select the **Case Management (Provider)** organization level when logging in to do this work.

   For **CDDPs**:

   ![Login screen for CDDPs]

   For **Brokerages**:

   ![Login screen for Brokerages]

2. From the left-hand yellow navigation menu, select **Client → DD Eligibility Enrollment**.

   ![Navigation menu screen]

3. This will take you to the **Find DD Eligibility Enrollment** search screen. In this screen, you can search by clicking the Find button at the bottom of the screen to trigger the Create button, or to see if there is an existing DDEE (0337) form for the individual you need to submit information on.

To trigger the **Create** button to appear, simply click **FIND**.

![Find DD Eligibility Enrollment](image)

4. Then scroll to the bottom of the page and click on **Create** to create new DDEE (0337) Form.
Once you click on CREATE, a smaller window will pop-up to help you search for the individual for whom you need to create a new DDEE (0337) form. Enter the PRIME number for the individual in the Client Prime field & click FIND. For more information on how to create a DDEE (0337) form in the new format for an individual who does not yet have a Prime Number assigned, please see the help document *How to Create a DDEE Form without a Prime* available on the eXPRS Help Menu.

6. The individual’s DHS client information will return below the search fields. Click on the individual’s LAST NAME (a hyperlink) from the list.
7. This will return to the **DD Eligibility Enrollment** form screen with the individual’s information pre-populated & the form containing fewer sections than before.

Let’s walk through the new form sections
The **top section** shows you the status of the form, your CME information, and a place where you upload any supporting documents needed for the enrollment information you are submitting. Simply browse to find the document saved on your computer & then attach.

### DD Eligibility Enrollment

**TAU Status:** Draft  
**Community Developmental Disability Program:** CDDP - ####

**Attach File:**  
**Attach**

### Client Information

This information should be pre-populated after you searched for the individual needed. No other information is required by you in this section, however you can add a Social Security Number or another name/alias for the individual, if desired.

### Enrollment Plan Service

In this section, select from the **Plan** dropdown the service plan option the individual is enrolling in to with the **Start Date** of that enrollment. Leave the **End Date** blank if this is a current enrollment & expected to be ongoing.

This enrollment information is necessary so the DD TAU can add the correct service coding in the DHS mainframe systems for the individual. This coding is required for eXPRS CPA & POC/SPA authorizations & billings to process successfully.

You can click **ADD** to add more service enrollment lines/rows as needed.
The dropdown options for CDDPs under **Plan** are:

<table>
<thead>
<tr>
<th>Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Exam Coding Request</td>
</tr>
<tr>
<td>Intake Only - Prime Needed</td>
</tr>
<tr>
<td>SE48 - CDDP Waiver CM</td>
</tr>
<tr>
<td>SE49 - CDDP In-Home Support Svc</td>
</tr>
<tr>
<td>SE50 - Adult 24hr Residential Facilities</td>
</tr>
<tr>
<td>SE51 - Supported Living Services</td>
</tr>
<tr>
<td>SE53 - Transportation Services</td>
</tr>
<tr>
<td>SE54 - Employment Services</td>
</tr>
<tr>
<td>SE141 - SACU fka State Operated Community Program</td>
</tr>
<tr>
<td>SE142 - Children’s 24hr Residential Program</td>
</tr>
<tr>
<td>SE150 - Family Support Services for Children</td>
</tr>
<tr>
<td>SE151 - In-Home Supports for Children</td>
</tr>
<tr>
<td>SE158 - DD Adult Foster Care</td>
</tr>
<tr>
<td>SE258 - DD Children Foster Care</td>
</tr>
<tr>
<td>State Plan Personal Care (SPPC) Only</td>
</tr>
<tr>
<td>General Fund - In-Home Adults/Children</td>
</tr>
<tr>
<td>General Fund - Other</td>
</tr>
<tr>
<td>General Fund - Residential Placement</td>
</tr>
</tbody>
</table>

- **Admin Exam Coding Request** = use this to request coding for the individual to receive an Admin Exam for eligibility determination purposes.

- **Intake Only – Prime Needed** = use this to request a Prime number be assigned for new intake clients who do not already have a Prime Number.

- **SE48 – CDDP Waiver CM** = use this for enrollment of an individual who is receiving TXIX Medicaid eligibility via the 300% Rule or PMDDT determinations & need monthly contacts to maintain their TXIX eligibility.

- **SE49 – CDDP In-Home Support Services**

- **SE50 – Adult 24-Hour Residential Facilities**

- **SE51 – Supported Living Services**

- **SE53 – Transportation Services** = use this if you are enrolling the individual into SE53 CPA Transportation, and not Plan of Care authorized transportation.

- **SE54 – Employment Services**
- SE141 – SACU fka State Operated Community Program
- SE142 – Children’s 24-hr Residential Program
- SE150 – Family Supports for Children
- SE151 – In-Home Supports for Children
- SE158 – DD Adult Foster Care
- SE258 – DD Children’s Foster Care
- **State Plan Personal Care (SPPC) Only** = use this for individuals who are eligible for & will be receiving State Plan Personal Care (SPPC – OR502) services ONLY.
- **General Fund – In-Home Adults/Children** = use this for enrollment to any In-Home services when the individual has an exception approved for 100% GF funded services or during the NOPA appeal request period.
- **General Fund – Other** = use this for enrollment to any other service type when the individual has an exception approved for 100% GF funded services or during the NOPA appeal request period.
- **General Fund – Residential Placement** = use this for enrollment to any Residential Placement services (GH, Supported Living, Foster Care) when the individual has an exception approved for 100% GF funded services or during the NOPA appeal request period.

The dropdown options for Brokerages under **Plan** are:

<table>
<thead>
<tr>
<th>Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>SE148 - Brokerage Waiver CM</td>
</tr>
<tr>
<td>SE149 - Brokerage In-Home Support Svc</td>
</tr>
<tr>
<td>SE149 - General Fund Only</td>
</tr>
<tr>
<td>State Plan Personal Care (SPPC) Only</td>
</tr>
</tbody>
</table>

- **SE148 – Brokerage Waiver CM** = use this for enrollment of an individual who is receiving TXIX Medicaid eligibility via the 300% Rule or PMDDT determinations & need monthly contacts to maintain their TXIX eligibility.
• SE149 – Brokerage In-Home Support Services

• SE149 - General Fund Only = use this for enrollment to any In-Home services when the individual has an exception approved for 100% GF funded services or during the NOPA appeal request period.

• State Plan Personal Care (SPPC) Only = use this for individuals who are eligible for & will be receiving State Plan Personal Care (SPPC – OR502) services ONLY.

Additional Information to Assist the State with Processing
This is the comments section of the form. You have 500 characters to leave any notes you’d like to communicate with the state DD TAU staff. Please, do not be shy about using this section. The more information you share, the easier and quicker your form will be processed.

The **bottom of the form** will show a drop-down menu for the Service Coordinators or Personal Agents associated with your CME. eXPRS will default to your name if you have the Service Coordinator or Personal Agent user role, however you can select a different SC or PA assigned to the individual from the dropdown menu, if needed. If you are not a Service Coordinator or Personal Agent, select the appropriate Service Coordinators or Personal Agent from the drop-down.

There are the also **action buttons** available below the name dropdown to use once the form has been completed.

- **CLOSE** = will close the screen. If you have not yet clicked **SAVE** (*which will save your information in Draft and assign the electronic form a form number*) you will lose all your data you’ve just entered.

- **RESET** = will clear the form & take you back to the client find process discussed in step #5 above.
• **SUBMIT** = will create a Form ID #, submit the completed form to the state DD TAU for processing with a TAU status of *Received*. If an error was made on the DDEE (0337) form or this submission needs recalled, the CME can withdraw this DDEE (0337) form *only* if the TAU status is *Received*.

• **SAVE** = will save the form in *Draft* & create a Form ID # so you can update information to the form, if needed, before submitting it to the DD TAU.

8. For more information on updating previously completed DDEE (0337) forms in the new format, please see the help document *How to Find and Update Eligibility and Enrollment Forms* available on the eXPRS Help Menu.

9. For more information on how to create a DDEE (0337) form in the new format for an individual who does not yet have a Prime Number assigned, please see the help document *How to Create a DDEE Form without a Prime* available on the eXPRS Help Menu.