How to Enter Initial & Update DD Eligibility Information for Early Childhood
(v4; 8/10/2018)

eXPRS has recently implemented new functionality that allows CDDPs to directly enter Intake & DD Eligibility information for individuals by using new features via the VIEW CLIENT page. While all CME users will continue to be able to view DD Eligibility information as they have in the past (if they’ve had permissions to do so), this new functionality to directly enter the information is only available for CDDP staff assigned the below user roles:

- CDDP Eligibility Specialist
- CDDP Eligibility Specialist Processor

The new Intake & DD Eligibility entry features are dynamic, meaning field & dropdown information options are activated & defined by the TYPE of intake/eligibility determination work that has been completed for the individual.

- Early Childhood (age birth-7)
- School Aged Children (age 7-9, 9-18 or 22 depending on primary diagnosis)
- Adults (age 18+, depending on primary diagnosis)
- CDDP Transfers
- Eligibility Terminations or Denials

There are separate assistance guides for each TYPE of eligibility determination work. Please use the specific guide for the type of eligibility determination work completed. This guide will address Early Childhood determinations.

While the actual eligibility determination work is completed external to eXPRS by the CDDP’s Eligibility Specialist, it is the direction/expectation from ODDS that all eligibility intake & determination information be submitted to ODDS via this new process. ODDS has outlined specific timelines for when this information must be entered into eXPRS:

- For new applicant intakes, the initial eligibility record information must be created & saved as a draft record within 10 days of the date the intake was completed.
• For individuals who do not have a DHS prime number assigned, the CDDP must first request a prime number by submitting a DDEE (0337) form before completing any intake/eligibility determination work in eXPRS.

• If a DHS prime number has been requested, the initial eligibility record information must be created & saved as a draft record within 10 days of receipt of that prime number when assigned.

Additional information, policy guidance & instruction from ODDS regarding Intake & Eligibility Determination procedures can be found here:

ODDS Intellectual & Developmental Disabilities Services & Eligibility
https://www.oregon.gov/DHS/SENIORS-DISABILITIES/DD/Pages/eligibility.aspx

To Enter DD Eligibility Information for EARLY CHILDHOOD:

1. Login to eXPRS. Users will need to login under the Case Management (Provider) login option.

2. From the left-hand menu, click on Client → View Client to search for the individual who needs DD eligibility information added.
3. In the **View Client** page, use the individual’s **Client Prime** number to find that individual’s record.
   - If the individual is new to Oregon I/DD services, you may first need to request a prime number for the individual by submitting a DDEE (0337) form to the DD TAU.

4. If search results are returned, click on the individual’s **Last Name** (blue hyperlink) to open their profile page.
5. With the individual’s profile page open, scroll down to the DD Eligibility section. Click Add to add new eligibility information.

6. In the DD Eligibility Add page, add the information needed to create an initial draft eligibility record. The individual’s information will be pre-populated, as will your CDDP branch number.
   - **Intake Date** = the date the initial intake was completed
   - **Intake Status** = draft *(until eligibility determination is completed)*
   - **Notes** = add any notes or information desired
7. When saved, the initial eligibility segment will be saved and users will be returned to the individual’s profile page. You should now see the eligibility segment listed in the **DD Eligibility** section.

8. When the eligibility determination work is completed, you will need to return to the individual’s profile (using steps #2 - #4 above). Click **Edit** at the far right on the draft eligibility segment to open it and add the eligibility determination information.

9. With the **DD Eligibility Add** page open again, complete the following steps to update the segment information.
   - **Intake Status** = Completed *(now that the eligibility determination is complete).*

When **Completed** is selected, this will trigger additional information fields to appear.
10. For **Determination Status**, select the appropriate option for the eligibility determination made for the individual from the dropdown menu. Based on the option selected from the dropdown, additional fields will display that are applicable to that selection.

- **Approved** = the individual *is eligible* for DD services
- **CIIS Only** = used only for individuals who are part of the CIIS Program, but do not have DD Eligibility determined
- **Denied** = the individual *is not eligible* for DD services
- **Eligibility Extension Approval** = used by ODDS for when extensions are granted for delayed eligibility re-determinations.
- **Re-determination – Approved** = the individual *is eligible* for DD services
- **Re-determination – Denied** = the individual *is not eligible* for DD services
- **Transfer** = *not required to be used at this time*
11. Moving to the next row of data, add the **Notice Date** in the appropriate field.

- **Notice Date** = the date the Eligibility Determination notice was sent to the individual and/or their guardian informing them of the eligibility determination decision.
- **Termination Date** = remains as **12/31/9999** if the eligibility is active; this will be adjusted by the system based on selections in future sections.
- **Termination Reason** = remains as “**Select...**” if the eligibility is active; this will be adjusted by the system based on selections in future sections.

12. In the next section, select the **Type of Eligibility** from the dropdown menu. Again, based on your selection from the menu, the screen will adjust to display additional fields based on that selection.

In this guide, we are showing **Early Childhood Eligibility**.
13. Select the individual’s **Primary Diagnosis** used to determine their eligibility for services from the dropdown menu.

- Once a selection is made, the **Termination Date**, **Termination Code** and **Data for Eligibility Determination** fields will update, based on the selection. In this example, the **Primary Diagnosis** selected is **Down Syndrome (DNS)**.
• Up to 4 Additional Qualifying Diagnoses options can be added, if applicable. Just select from the dropdown menus.

14. In the Data for Eligibility Determination section, verify that the pre-populated option displayed (based on the Type of Eligibility selected above) is accurate. Edit this selection, as appropriate.

a) Medical Statement (DO, MD, ND, NP, PA, Licensed PhD, or PsyD) requires that you select at least 2 applicable options under Area(s) of Delay below.
b) **Early Childhood Assessment With two areas of significant delays** requires that you add at least 1 **Test**, and at least 2 applicable **Area(s) of Delay**.

To add a Test, click **Add Test**.

Add the **Test Date** in the field, and then select the applicable **Test Name** from the dropdown menu.
Then select the applicable options (at least 2) from the **Area(s) of Delay** section.

15. With all the required eligibility information added for the individual, you can:
   - add any notes in the **Notes** field, as needed
   - select the applicable Eligibility Specialist for your CDDP who made the Eligibility Determination from the dropdown menu
   - upload & attach any documents, as needed.
   - Click **SAVE** to save the completed eligibility record segment
16. You will be returned to the individual’s VIEW CLIENT profile page with the eligibility segment showing as Completed & in Approved status.