How to FIND & UPDATE
a DD Eligibility Enrollment Form in eXPRS

(updated 10/1/2019)

The DD Eligibility & Enrollment (DDEE or 0337) 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 the old DDEE (0337) form is no longer needed. This has enabled the DDEE (0337) 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. To create a new DDEE form for an individual in the new DDEE form format for the FIRST time, please use the How to Create a NEW DD Eligibility Enrollment Form user guide available on the eXPRS Help Menu.

• The ODDS TAU will continue to process old layout DDEE 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.

This user guide will assist CME users in finding & sending updated enrollment information using a DDEE form in the new format.

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

  o CDDPs = CDDP Eligibility Enrollment Processor
  o Brokerages = Brokerage Eligibility Enrollment Processor
To find & update a DD Eligibility Enrollment form in the new format:

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](image1.png)

For **Brokerages**:

![Login](image2.png)

2. From the left-hand yellow navigation menu, select **Client → DD Eligibility Enrollment**.
3. This will take you to the **Find DD Eligibility Enrollment** search screen. Once you have created an initial DDEE (0337) form for an individual in the **NEW** format & it has been **Completed** by the TAU, you can copy & update that form to submit enrollment changes.

First, you will need to search to see if you have an existing DDEE (0337) form in the **NEW** format for the individual you need to submit information on.

To search for a DDEE (0337) form, simply click **FIND** to search for all forms, OR enter the individual’s prime number in the **Client Prime** field & then click **FIND** to search for a specific individual.

**If the individual does not yet have a Prime Number assigned, see the user guide [How to Create a DDEE Form without a Prime](#) for instructions.
4. The forms that match the search criteria entered will show in a list below the search fields. You will notice that the information columns are a bit different than before with the NEW DDEE (0337) form format.

<table>
<thead>
<tr>
<th>Form ID</th>
<th>Submit Date</th>
<th>Last Name</th>
<th>First Name</th>
<th>Client Prime</th>
<th>CDDP/Brokerage</th>
<th>TAU Status</th>
<th>Pnd Rsn</th>
<th>Processor</th>
<th>Processed Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>145****1</td>
<td>9/24/2019</td>
<td>WOODSMAN</td>
<td>HUNTER</td>
<td>abc5555y</td>
<td>Completed</td>
<td>Draft</td>
<td></td>
<td>Katie L Ward</td>
<td>9/24/2019</td>
</tr>
<tr>
<td>145****2</td>
<td>9/11/2019</td>
<td>FLOWERS</td>
<td>DAISY</td>
<td>xy20000a</td>
<td>Completed</td>
<td>Received</td>
<td></td>
<td>Katie L Ward</td>
<td>9/11/2019</td>
</tr>
</tbody>
</table>

- **Form ID** = the system assigned, unique ID number for the form created.
- **Submit Date** = the date the form was submitted by the CME.
- **Last Name** = last name of the individual
- **First Name** = first name of the individual
- **Client Prime** = the DHS prime number assigned to the individual
- **CDDP/Brokerage** = the name of the CME
- **TAU Status** = the status of the form
  - **Draft** = form information has been saved, but not yet submitted
  - **Received** = the form has been submitted by the CME & is in the queue for the TAU staff
  - **In-Process** = the TAU staff is begun working the form
  - **Pending** = the form has been pended by TAU staff, as more information may be needed before it can be completed. See the Pend Reason for details.
  - **Withdrawn** = the submitted form has been withdrawn & pulled back by the CME
  - **Rejected** = the submitted form has been rejected by the TAU
  - **Completed** = the form coding & other work needed has been completed by the TAU.
- **Pnd Rsn** = if the form has a status of Pending, a code will show here noting the reason. The Pend code reason & form action category are explained at the top of the form, when open.
- **Processor** = the name of the TAU staff who is working your submitted form.
- **Processed Date** = the date the form was moved to completed status.

5. From the results list, click on the blue **FORM ID number** (which is a hyperlink) of the individual’s most recent form so you can copy it to submit new
enrollment information for them. CMEs can copy any form that is in a status of *completed, rejected,* or *withdrawn.*

If a form is *in process* and you need to make a correction, you may have to wait for your form to be completed or ask that it be rejected.

**REMEMBER,** any DDEE (0337) form that has a submit date that is *before 10/28/2019* (the date the system was updated to the NEW DDEE page format) *cannot be copied.* A NEW formatted form will need to be created for the individual if enrollment coding changes are needed.

6. With the individual form you selected now open, scroll to the bottom & click on the **COPY** button to create a new draft DDEE (0337) form.

7. You now have a new *draft* Eligibility Enrollment form.

In the new copied *draft* form, the **Client Information** & the current **Enrollment Plan Service** information will be carried over. You can then add any new
service Enrollment Plan information, notes and upload/save documents related to this enrollment action.

8. With all the new updated information added related to this enrollment action, click the appropriate button at the bottom of the page to **SAVE** and/or **SUBMIT** the form to the TAU for processing.
9. Once submitted, the DDEE (0337) form will show a status of *received*, meaning the form is now in the TAU work queue in eXPRS.

10. You can check the form periodically to determine its progress through the coding process. When it shows a status of *completed*, all coding work needed from the TAU for that enrollment action has been completed.