

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:

- CDDPs = **CDDP Eligibility Enrollment Processor**
- 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
Password accepted. Choose your organization and/or program area for this session.
You are in the User Acceptance environment

Login Name:	<input type="text" value="CDDPuser1"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="Case Management Provider (Provider)"/>

For **Brokerages**:

Login
Password accepted. Choose your organization and/or program area for this session.
You are in the User Acceptance environment

Login Name:	<input type="text" value="BROKuser1"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="BROKERAGE /Case Mgmt Prov (Provider)"/>

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

Client	▶ View Client
Provider	▶ DD Eligibility Enrollment
Contracts	▶ Oregon Needs Assessment
Prior Authorization	▶ SIS Assessments
Claims	▶ Reports
CM/PA TCM Billing	▶
Liabilities	▶
Reports	▶
Financial Maintenance	▶

No matching

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.**

Find DD Eligibility Enrollment

At least one search criteria must be entered. If a Form ID is entered, all other search criteria is ignored.
Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

To create a new enrollment, please search first to see if they already exist. After the find results come back you can create one by clicking Create at the bottom.

Form ID:

Client Prime:

Last Name:

First Name:

D.O.B.:

TAU Status:
Select All: In Process Pending Draft Withdrawn Rejected Completed

Community Developmental Disability Program: Clatsop - 0429

Created By: Active Only

Created Date Range: -

Submitted By: Active Only

Submitted Date Range: -

Service Coordinator: Active Only

Processed Date Range: -

Max Displayed: 25

Find **Reset**

Enter the individual's Prime Number here and then click FIND to get a list of DDEE (0337) forms for that individual.

OR ... simply click FIND to get a list of all DDEE (0337) forms.

- 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.

Form ID	Submit Date	Last Name	First Name	Client Prime	CDDP	TAU Status	Pnd Rsn	Processor	Processed Date
145****1	9/24/2019	WOODSMAN	HUNTER	abc5555y		Completed		Katie L Ward	9/24/2019
145****8	9/11/2019	FLOWERS	DAISY	xyz0000a		Completed		Katie L Ward	9/11/2019

- **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.

- 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.

Form ID	Submit Date	Last Name	First Name	Client Prime	CDDP	TAU Status	Pnd Rsn	Processor	Processed Date
145****1	9/24/2019	WOODSMAN	HUNTER	abc5555y		Completed		Katie L Ward	9/24/2019
145****8	9/11/2019	FLOWERS	DAISY	xyz0000a		Completed		Katie L Ward	9/11/2019

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.

DD Eligibility Enrollment

Form ID: 145****1
TAU Status: Completed
Community Developmental Disability Program: CME Name

No attachments found to display.

Client Information

Client Prime: [redacted] 034 [redacted] 15

No attachments found to display.

Processor: Katie L Ward
State Eligibility/Title XIX Waiver Specialist: Katie L Ward
Completed Date: 9/17/2019

Close Copy

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.

DD Eligibility Enrollment

Form ID: 146****4
TAU Status: Draft

* Community Developmental Disability Program: CME Name

Attach File: Browse... No file selected.
Attach

File Name	Saved Date	
TEST attachment for DDEE forms.docx	10/1/2019	Remove

Client Information

Client Prime: abc5555y  SSN: *DOB: mm/dd/yyyy
*Last Name: WOODSMAN *First Name: HUNTER
Birth Name/Alias: *Ethnicity: Non-Hispanic
*Gender: Male *Race: White

*** Enrollment Plan Service**

*** The earliest date of enrollment for paid services is the start date of the ISP. The enrollment date cannot be the date of the case management's face-to-face LOC evaluation and signature unless the individual also has Medicaid and there is an authorized ISP in place. If DHS does not approve the LOC for any reason, you must submit a funding request.

Plan	Start Date	End Date	
SE48 - CDDP Waiver CM	9/1/2019		Remove
SE49 - CDDP In-Home Support Svc	9/27/2019		Remove

Add

Additional Information to Assist the State With Processing (54/500)

Notes on new enrollment information can be added here.

SC/PA: Service Coordinator Name - CME Case Management Prov
Created By: CDDPuser2 Created Date: 10/1/2019

Close Reset Submit Save Delete

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.

SE49 - Support Svc 9/27/19

Add

▼ **Additional Information to Assist the State With Processing (54/500)**

Notes on new enrollment information can be added here.

SC/PA: Service Coordinator Name - CME Case Management Prov

Created By: CDDPuser2 Created Date: 10/1/2019

Close Reset Submit Save Delete

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.

DD Eligibility Enrollment

Submitted successfully.

Form ID: 146****4

TAU Status: Received

Community Developmental Disability Program: CME Name

File Name	Saved Date
TEST attachment for DDEE forms.docx	10/1/2019

▼ **Client Information**

Client Prime: abc5555y	SSN: XXX-XX-XXXX	DOB: mm/dd/yyyy
Last Name: WOODSMAN	First Name: HUNTER	
Birth Name/Alias:	Ethnicity: Non-Hispanic	
Gender: Male	Race: White	

▼ **Enrollment Plan Service**

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.