

Creating a New DD Eligibility Enrollment (DDEE) Form for an Individual Without a Prime Number

At times, an individual who is new to DD services in Oregon will be determined DD eligible and the CME will need to report enrollment information. However, the individual does not yet have an ODHS Prime Number assigned. CME staff can still submit a DDEE (0337) form for those individuals.

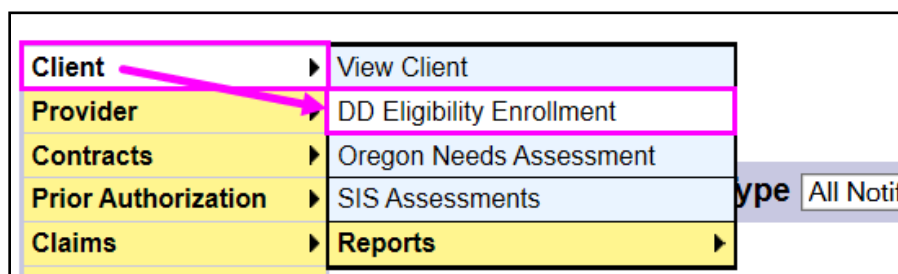
For full details on the ODDS policies and procedures for when creation/submission of a DDEE (0337) form is now needed, please see the *DD Eligibility and Enrollment (DDEE/0337) Worker Guide*.

Users will need one of the following roles to do this work:

- Eligibility Enrollment Preparer
- Eligibility Enrollment Processor

Creating a new DDEE (0337) form without a Prime

1. Log into eXPRS under the **Case Management (Provider)**, and from the left navigation, select **Client > DD Eligibility Enrollment**.



5. On the **Find DD Eligibility Enrollment** screen, select the **Find** button. This will cause the **Create** button to appear. You can also use search criteria to see if there is an existing DDEE (0337) form for the individual you want to submit information for.

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:

Coordinator:


Processed Date Range: -

Max Displayed: 25



2. Select the **Create** button to create a new DDEE (0337) Form.

No eligibility enrollments that match the search criteria were found



6. A search pop-up will appear. For individuals who do not yet have a Prime Number, enter their **Last Name**, **First Name** and **Birth Date** for the individual in the corresponding fields and click **Find**.

Choose the client to enroll.

At least one search criterion must be entered. When searching by name only, either the first name or last name (or both) must be present, and contain only alphabetic characters. If a name search would return too many results, additional criteria are required.

Last Name:

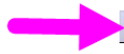
First Name:

Birth Date:

Gender:

Client Prime:

Max Displayed: 25



- If ODHS has no record for the individual you entered, you will get the message “**Nothing found to display**”. Select the **New Client/Prime Needed** button.

Choose the client to enroll.

At least one search criterion must be entered. When searching by name only, either the first name or last name (or both) must be present, and contain only alphabetic characters. If a name search would return too many results, additional criteria are required.

Last Name:	Branches
First Name:	Holly
Birth Date:	1/15/1970
Gender:	Unspecified
Client Prime:	
Max Displayed:	25

Find Cancel

Nothing found to display.

New Client/Prime Needed

- You will be directed to the main DDEE (0337) form page. In the **Client Information** section, complete all fields for the individual that are noted by a red asterisk.

DD Eligibility Enrollment

TAU Status: Draft

* Community Developmental Disability Program: CME Name

Attach File: Browse... No file selected.

Attach

▼ Client Information

Client Prime:	SSN:	*DOB: 1/15/1970
*Last Name: Branches	*First Name: Holly	
Birth Name/Alias:	*Ethnicity: Non-Hispanic	
*Gender: Female	*Race: White	

- Continue to complete the rest of the DDEE (0337) form for the individual. At a minimum, this includes:
 - Plan Dropdown:** Select **Intake Only – Prime Needed**.
 - Start Date:** Enter date of Intake
 - Additional Information:** Enter any notes needed.
 - SC/PA:** Select the agency staff who will be assigned to work with the individual.

The screenshot shows a web form with the following elements:

- Plan:** A dropdown menu with "Intake Only - Prime Needed" selected.
- Start Date:** A date field with "9/13/2019" entered.
- End Date:** An empty date field.
- Add:** A button below the date fields.
- Additional Information to Assist the State With Processing (31/500):** A section header followed by a text area containing the placeholder text "Add any notes you'd like here."
- SC/PA:** A dropdown menu with "SC Name - Case Management Provider" selected.
- Buttons:** "Close", "Reset", "Submit", and "Save" buttons at the bottom. A pink arrow points to the "Submit" button.

Click on the button to take the appropriate action on the DDEE (0337) form.

- **Close:** Closes the screen. If you have not yet saved the page, all data will be lost.
- **Reset:** Clears the form and takes you back to search for an individual.
- **Submit:** Creates a Form ID # and submits the completed form to Technical Assistance Unit for processing. The CME can withdraw this DDEE (0337) form while the **TAU Status** is **Received**.
- **Save:** Save the form in **Draft** status and creates a Form ID #.