

# Local Authority User Enrollment Form

Incomplete or illegible forms will not be processed. An asterisk indicates required fields. Maintain form in local file for audit purposes. Send completed for to [Info.eXPRS@odhsoha.oregon.gov](mailto:Info.eXPRS@odhsoha.oregon.gov) or fax to (503) 947-5044.

## Select Action

<input type="checkbox"/> <b>Add User</b>	<input type="checkbox"/> <b>Modify User</b>
<input type="checkbox"/> <b>Deactivate User</b>	<input type="checkbox"/> <b>Change of Information</b>

## User Information

*User's Name: (Last, First MI)	eXPRS Login Name:
*Job Title:	*Name of County or Organization:
*Organization Address: (Mailing Address)	*City, State, Zip:
*Phone Number:	*Email Address:
Requesting Access for the following counties:	

## CDDP Local Authority User Roles (assign to the CDDP Organization)

Add	Del	Roles	User Role/Description
<b>Contracting Roles</b>			
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth IGA Manager</b>	Requires Approval by the Authorized Board Delegated Signatory. All IGA Coordinator Permissions, and also - <ul style="list-style-type: none"> <li>• <b>Accept/Reject/View:</b> SEPA funding</li> <li>• <b>View:</b> Individual, Provider, SIS Assessment Information</li> <li>• <b>Run:</b> Various Payment and Enrollment reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth IGA Coordinator</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Contract and funding information (PAL, SEPA etc.)</li> </ul>

			<ul style="list-style-type: none"> <li>• <b>Run:</b> Contract and funding-related reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth PPA Coordinator</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Service Funding (SEPA, BA Lines etc.)</li> <li>• <b>Run:</b> Service funding-related reports</li> </ul>
<b>CPA Services Roles</b>			
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth CPA Manager</b>	All CPA Preparer Permissions, and also – <ul style="list-style-type: none"> <li>• <b>Submit/Void:</b> Direct Service CPAs</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth CPA Preparer</b>	All CPA Coordinator Permissions, and also: <ul style="list-style-type: none"> <li>• <b>Create/Delete/Update:</b> Direct Service CPAs</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth CPA Coordinator</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Direct Service CPAs, Individual/Service information</li> <li>• <b>Run:</b> Service &amp; payment-related reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth Claims Coordinator</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Provider CPA claims; Direct Service CPAs, Individual/Service information</li> <li>• <b>Run:</b> Service &amp; payment-related reports</li> </ul>
<b>Plan of Care Roles</b>			
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth POC Super User<sup>1</sup></b>	Includes all POC Manager permissions, and also: <ul style="list-style-type: none"> <li>• <b>Split:</b> Plan of Care Plan Lines and Service Prior Authorizations</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth POC Manager</b>	Includes all POC Preparer permissions, and also: <ul style="list-style-type: none"> <li>• <b>Submit/Withdraw/Void:</b> Plan of Care Plan Lines &amp; Service Prior Authorizations</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth POC Preparer</b>	Includes all POC Viewer Permissions, and also: <ul style="list-style-type: none"> <li>• <b>Create/Save/Update/Delete:</b> Draft Plan Lines &amp; Service Prior Authorizations</li> <li>• <b>View:</b> Claims</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth POC Viewer</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Plans of Care, Plan Lines, Service Prior Authorizations, Service Delivered Billing Entries, Individual, Provider information</li> <li>• <b>Run:</b> Plan of Care reports.</li> </ul>

<sup>1</sup> Requires POC Super User training; max 3 Super Users per CDDP.

<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth POC Claims Manager</b>	Includes POC Claims Reviewer permissions, and also: <ul style="list-style-type: none"> <li>• <b>Create/Delete/Update/Submit:</b> Service Delivered Billing Entries</li> <li>• <b>View:</b> Individual, Provider information</li> <li>• <b>Run:</b> Plan of Care reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth POC Claims Reviewer</b>	<ul style="list-style-type: none"> <li>• <b>Accept/Reject:</b> Pending Service Delivered Billing Entries</li> <li>• <b>View:</b> Plan of Care, Plan Line, Service Prior Authorization, Claims information</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth Provider Panel Manager</b>	<ul style="list-style-type: none"> <li>• <b>Add/Update/Remove:</b> Provider Panel</li> <li>• <b>View:</b> Provider Information</li> <li>• <b>Run:</b> Provider-Site Expire reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth Provider Viewer</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Provider Panel, Limited provider information</li> <li>• <b>Run:</b> Provider Status, CHC/PEAA Expire reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth Provider EVV Exceptions Manager</b>	<ul style="list-style-type: none"> <li>• <b>Add/Update/Remove:</b> PSW EVV Exceptions</li> </ul>
<b>View Only Roles</b>			
<input type="checkbox"/>	<input type="checkbox"/>	<b>SIS Local Auth Viewer</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Individual SIS Assessments</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth eXPRS View Only</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Individual, Provider, Case Management and Direct CPA Services information</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth eXPRS Report Access Only</b>	<ul style="list-style-type: none"> <li>• <b>Run:</b> Various eXPRS reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth Service Coordinator Viewer</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Case Management (SE48), RFFS Claims</li> <li>• <b>Run:</b> RFFS reports</li> </ul>

<input type="checkbox"/>	<input type="checkbox"/>	<b>Local Auth PC20 Report Viewer</b>	<ul style="list-style-type: none"> <li>• <b>Run:</b> PC20 Report</li> </ul>
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## CDDP Case Management User Roles

ADD	DEL	Roles	User Role/Description
<b>Case Management Roles</b>			
<input type="checkbox"/>	<input type="checkbox"/>	<b>CM Service Coordinator</b>	<b>No permissions.</b> Adds name to dropdowns for RFFS claims, DDEE forms, etc.
<input type="checkbox"/>	<input type="checkbox"/>	<b>CM CPA Manager</b>	Cannot be assigned with CM Encounter Manager. All CM CPA Preparer Permissions, and also - <ul style="list-style-type: none"> <li>• <b>Submit/Void:</b> Case Management (SE48) Client Prior Authorizations</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>CM CPA Preparer</b>	<ul style="list-style-type: none"> <li>• <b>Create/Delete/Edit:</b> Draft Case Management Client Prior Authorizations (SE48)</li> <li>• <b>View:</b> Individual and Case Management Service Information</li> <li>• <b>Run:</b> Case Management Service &amp; RFFS Payment Reports</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>CM Encounter Manager</b>	Cannot be assigned with CM CPA Manager. All CM Encounter Viewer Permissions, and also - <ul style="list-style-type: none"> <li>• <b>Create/Delete/Update/Submit/Void:</b> Case Management (SE48) RFFS claims</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>CM Encounter Viewer</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Case Management (SE48) RFFS claims, Individual and Case Management Service Information</li> <li>• <b>Run:</b> Case Management Service &amp; RFFS Payment Reports</li> <li>•</li> </ul>
<b>DD Eligibility Enrollment (0337) Roles</b>			
<input type="checkbox"/>	<input type="checkbox"/>	<b>CDDP Eligibility</b>	All Eligibility Enrollment Preparer Permissions, and also - <ul style="list-style-type: none"> <li>• <b>Submit/Withdraw:</b> DD Eligibility Enrollment (0337)</li> </ul>

		<b>Enrollment Processor</b>	
<input type="checkbox"/>	<input type="checkbox"/>	<b>CDDP Eligibility Enrollment Preparer</b>	All Eligibility Enrollment Viewer Permissions, and also – <ul style="list-style-type: none"> <li>• <b>Create/Delete/Update:</b> DD Eligibility Enrollment (0337)</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>CDDP Eligibility Enrollment Viewer</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> DD Eligibility Enrollment (0337), Individual information</li> <li>• <b>Run:</b> DD Eligibility Due Dates report</li> </ul>

**DD Eligibility Entry Roles**

<input type="checkbox"/>	<input type="checkbox"/>	<b>CDDP Eligibility Specialist<sup>4</sup></b>	For DD Eligibility Specialists only. All Eligibility Specialist Processor Permissions, and also – <ul style="list-style-type: none"> <li>• Adds the DD Eligibility Specialist's name to dropdowns.</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>CDDP Eligibility Specialist Processor<sup>5</sup></b>	For non-Eligibility Specialists doing eligibility data entry. All Eligibility Termination Processor Permissions, and also – <ul style="list-style-type: none"> <li>• <b>Create/Submit/Update:</b> DD Eligibility information</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>CDDP DD Eligibility Termination Processor</b>	<ul style="list-style-type: none"> <li>• <b>Update/Terminate:</b> Existing DD Eligibility information</li> </ul>

**Oregon Needs Assessment Roles**

<input type="checkbox"/>	<input type="checkbox"/>	<b>CM ONA SC</b>	<p>This role cannot be assigned until the user completes their required three-part training in Workday. The user or their manager should submit a copy of the certificate along with the User Enrollment Form. A user cannot be assigned this role and the ONA Assessor role at the same time.</p> <p>All ONA Viewer Permissions, and also –</p> <ul style="list-style-type: none"> <li>• <b>Copy/Create/Delete/Update/Submit:</b> Oregon Needs Assessments</li> </ul>
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<input type="checkbox"/>	<input type="checkbox"/>	<b>CM ONA Assessor</b>	<p>This role cannot be assigned until the user completes the virtual ONA New Assessor Orientation. The user or their manager should submit a copy of the certificate along with the User Enrollment Form. A user cannot be assigned this role and the ONA SC role at the same time.</p> <p>All ONA Viewer Permissions, and also –</p> <ul style="list-style-type: none"> <li>• <b>Copy/Create/Delete/Update/Submit:</b> Oregon Needs Assessments</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<b>CM ONA Viewer</b>	<ul style="list-style-type: none"> <li>• <b>View:</b> Oregon Needs Assessment, Individual, Provider Plan of Care, Service Prior Authorization Information</li> </ul>

### Signatures Required for All Roles (Except IGA Manager)

<b>Manager:</b> <i>(Print Name)</i>	<b>Phone Number:</b>	<b>Ext.:</b>
<b>Manager Title:</b>	<b>Email Address:</b>	
<b>Manager Signature:</b>	<b>Date:</b>	

### Signatures Required for IGA Manager Role Only

<b>Authorized Board Delegated Signatory:</b> <i>(Print Name)</i>	<b>Phone Number:</b>	<b>Ext.:</b>
<b>Title:</b>	<b>Email Address:</b>	
<b>*Authorized Board Delegated Signatory:</b> <i>(Signature)</i>	<b>Date:</b>	