

Entering and Updating DD Eligibility Information for CDDP Transfers

CDDPs can enter Intake and DD Eligibility information for individuals by using the **View Client** page. To do so, they will need one of the following roles:

- **CDDP Eligibility Specialist**
- **CDDP Eligibility Specialist Processor**

The Intake and DD Eligibility entry features are dynamic, meaning field and dropdown information options are activated and defined by the Type of intake/eligibility determination work that has been completed for the individual. This guide is for CDDP Transfers.

When an individual is transferring their Case Management Services from one CDDP to another CDDP, there are many tasks that are completed outside of eXPRS. Once the sending and receiving CDDPs complete those tasks, the receiving CDDP must update the individual's DD Eligibility Information in eXPRS.

To reduce the risk of delayed billing and payment of services to the individual, it is best practice to complete actions in eXPRS prior to the agreed upon transfer date.

Sending (Previous) CDDP's Actions:

1. End all Service Prior Authorizations and the Plan of Care
2. End Other Service Client Prior Authorizations (e.g., SE50, SE51, SE53)
3. End SE48 Case Management Client Prior Authorization

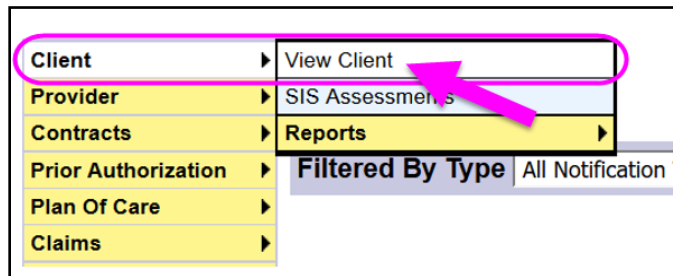
Receiving (New) CDDP's Actions:

1. Create SE48 Case Management Client Prior Authorization
2. Create Plan of Care and any Service Prior Authorizations
3. Create other Service Client Prior Authorizations (e.g., SE50, SE51, SE53)

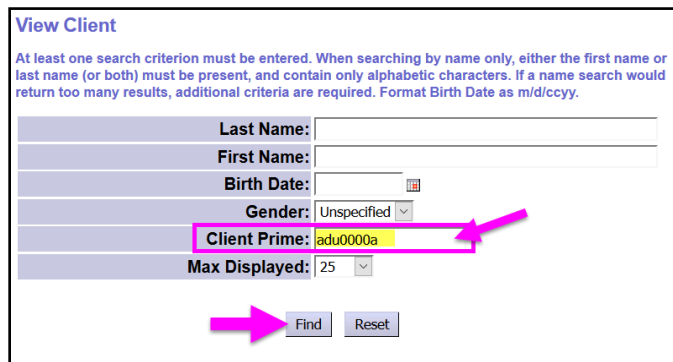
See the guide *eXPRS Tasks for Completing a CME Transfer* to assist in the transfer process.

To Enter DD Eligibility Information for a CDDP Transfer:

1. Log in to eXPRS as the Case Management (Provider) and select **Client > View Client**.



2. On the **View Client** page, search by the individual's Prime to view their record.



3. From the search results, select the **Last Name** Hyperlink to open their profile.

Export options: [CSV](#) | [Excel](#) | [PDF](#) | [RTF](#)

Last Name	First Name	Middle Initial	Title	Name Type	Birth Date	Deceased	Date of Death	Gender	Client Prime	Prime Type
Adult	Adu			P	mm/dd/yyyy	No		M	adu0000a	P

4. On the **Client > DD Eligibility** section, select the **Edit** button on the Sending CDDP's DD Eligibility segment.

Prime Type: P

Aliases

DD Eligibility

Initial Eligibility Date: 6/3/2021

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	
####	1/20/2021	Completed	Approved	6/3/2021	5/28/2027	AGE	Edit View Details

Add

- On the **DD Eligibility Edit** Page, adjust the **Termination Date** to the day before the receiving CDDP's DD eligibility for the individual is determined. Set the **Termination Code** to **Other**, and then select the **Save** button.

DD Eligibility Edit

Client Name: Adult Adu Client Prime: adu0000a
 Client Birthdate: mm/dd/yyyy Initial Eligibility Date: 06/03/2021

Determination CDDP: 3129 Intake Date: 1/20/2021 Intake Status: Completed Determination Status: Approved
 Notice Date: 6/3/2021 **Termination Date: 5/15/2022** **Termination Code: Other**

Notes:

Eligibility Specialist: Elig Spec Name

Attach Type: Eligibility Notice Other
 Attach File: No file chosen File size must not exceed 4 MB

- Selecting save will bring up the **Client** page again. Scroll down to the section again and select the **Add** button.

Birth Date: mm/dd/yyyy
 Deceased: No
 Date of Death:
 Gender: M
 Client Prime: adu0000a
 Prime Type: P

▶ **Aliases**

▼ **DD Eligibility**

Initial Eligibility Date: 6/3/2021

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code		
# #	1/20/2021	Completed	Approved	6/3/2021	5/15/2022	AGE	<input type="button" value="Edit"/>	<input type="button" value="View Details"/>

7. On the **DD Eligibility Add** page, enter the following information:
 - a. **Intake Date:** The date the receiving CDDP entered in the Eligibility Segment
 - b. **Determination Status:** Select Transfer to indicate a CDDP Transfer
 - c. **Notice Date:** The date the Eligibility Determination notice was sent to the individual and/or their guardian informing them of the eligibility determination decision

The screenshot shows the 'DD Eligibility Add' form. At the top, client information is displayed: Client Name: Adu Adult, Client Prime: adu0000a, Client Birthdate: mm/dd/yyyy, and Initial Eligibility Date: 05/16/2022. Below this, there are fields for Determination CDDP (###), Intake Date (05/16/2022), Intake Status (Select...), Determination Status (Select...), Notice Date (05/16/2022), Termination Date (12/31/9999), and Termination Code. A dropdown menu for 'Determination Status' is open, showing options: Select..., Approved, Denied, Eligibility Extension Approval, Re-determination - Approved, Re-determination - Denied, and Transfer. A pink arrow points to the 'Transfer' option. There are also pink circles with numbers 1, 2, and 3 highlighting the Intake Date, the Transfer option, and the Notice Date respectively.

8. Select the **Type of Eligibility** that applies to the individual. In most cases, this will be the same information as what was entered on the Sending CDDP's DD Eligibility entry.

This screenshot shows the 'DD Eligibility Add' form with the 'Determination Status' set to 'Transfer'. The 'Type of Eligibility' dropdown menu is open, showing options: Adult, Primary Diagnosis (Select...), Full Scale IQ (text input), Additional Qualifying Diagnosis (Adult, Early Childhood Eligibility, School Age), and another dropdown (Select...). The 'Adult' option is selected.

9. Select the individual's **Primary Diagnosis** and up to four **Additional Qualifying Diagnosis** options (if applicable).

This screenshot shows the 'DD Eligibility Add' form with the 'Type of Eligibility' set to 'Adult'. The 'Primary Diagnosis' is set to 'Intellectual Disability Moderate(ID2: 40-55)' and the 'Full Scale IQ' is 45. The 'Additional Qualifying Diagnosis' is set to 'Down Syndrome(DNS)'. There are pink boxes highlighting the 'Primary Diagnosis' and 'Full Scale IQ' fields. Below these are two more 'Additional Qualifying Diagnosis' fields, both set to 'Select...'. At the bottom, there are two 'Significant impairment in adaptive behavior' dropdown menus, both set to 'Select...'. An 'Add Test' button is visible at the bottom left.

10. In the **Significant Impairment in adaptive behavior** section, select the appropriate options from the two dropdown menus. Then select the **Add Test** button to add the adaptive test information.

Significant impairment in adaptive behavior: Assessment completed
 2 or more skill areas of 4 or below on ABAS
 Add Test
 Skill Areas:
 Socialization Community Use Communication

11. With test information open, add the **Test Date** and then select the **Test Name** from the dropdown menu.

Significant impairment in adaptive behavior: Assessment completed
 2 or more skill areas of 4 or below on ABAS
 Test Date: mm/dd/yyyy
 Add Test
 Skill Areas:
 Socialization Self-Care Health and safety Work
 Community Use Self-direction Mobility Home/school living
 Communication Functional academics Leisure
 Test Name: Select...
 Select...
 ABAS-3
 ABAS-II
 ABES
 SIB-R
 VABS-3
 VABS-II

12. Select at least 2 applicable options from **Skills Areas** or **Domain Areas**.

Significant impairment in adaptive behavior: Assessment completed
 2 or more skill areas of 4 or below on ABAS
 Test Date: mm/dd/yyyy
 Add Test
 Test Name: ABAS-3
 Skill Areas:
 Socialization Self-Care Health and safety Work
 Community Use Self-direction Mobility Home/school living
 Communication Functional academics Leisure
 Domain Areas:
 Communication Motor Skills Socialization
 Conceptual Practical Social
 Daily Living Skills

13. At the bottom of the page:

- 1) Add any additional information into the **Notes** box
- 2) Select the correct **Eligibility Specialist** who made the eligibility determination from the dropdown menu.
- 3) In the **Attach File** section, upload a copy of the Eligibility Notice (or Other document) sent to the individual or their guardian.
- 4) Select **Save** to save the information.

Notes: 1

add any notes here that you wish

Eligibility Specialist: 2 Elig Spec Name Active Only

Attach Type: Eligibility Notice Other 3

Attach File: 4 Browse... Sample Eligibility Notice.pdf File size must not exceed 4 MB

Save Reset Cancel

14. When the page is saved, you will be returned to the **Client** page and can see the new eligibility segment in the **DD Eligibility** section.

Client Prime: adu0000a						
Prime Type: P						
▶ Aliases						
▼ DD Eligibility						
Initial Eligibility Date: 6/3/2021						
Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code
####	5/16/2022	Completed	Transfer	5/16/2022	5/28/2027	AGE
####	1/20/2021	Completed	Approved	6/3/2021	5/15/2022	OTH
Add						