

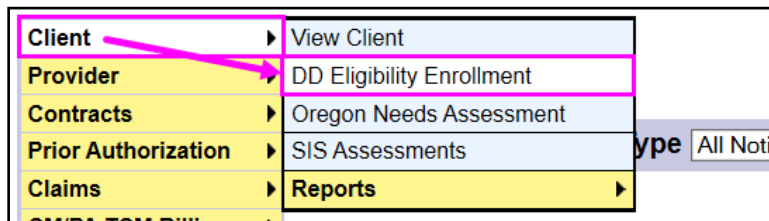
Finding and Updating a DD Eligibility Enrollment (0337) Form

The DD Eligibility and Enrollment (DDEE) process allows Case Management Entity staff to communicate Eligibility and Enrollment information directly with ODDS. 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 to be assigned the **Eligibility Enrollment Processor** roles to do this work:

Finding and Updating a DD Eligibility Enrollment Form

1. Log into eXPRS under the **Case Management Provider** role, then select **Client > DD Eligibility Enrollment**.




2. On the **Find DD Eligibility Enrollment** screen, once you have created an initial DDEE (0337) form for an individual and it has been **Completed** by the TAU, you can copy and/or update that form to submit enrollment changes. 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 and then click **Find** to search for a specific individual.

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TAU Status: Draft Withdrawn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

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

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.

- From the results list, click on the blue **Form ID number** hyperlink for the individual's most recent form so you can copy it to submit new enrollment information for them.

Processed Date Range:  

Max Displayed: All

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			9/24/2019
145****8	9/11/2019	FLOWERS	DAISY	xyz0000a		Completed			9/11/2019

TIP: 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. 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.

- 4. With the form open, click the **Copy** button to create a new draft DDEE (0337) form.

No attachments found to display.

Processor: [Redacted]

State Eligibility/Title XIX Waiver Specialist: [Redacted] Completed Date: 9/17/2019

Close Copy

- 5. On the new **draft** form, the **Client Information** and the current **Enrollment Plan Service** information are copied over. You can 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

*Last Name: WOODSMAN *First Name: HUNTER SSN: *DOB: mm/dd/yyyy

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

6. With all the new updated information related to this enrollment action, click **Save** and/or **Submit** the form to the TAU for processing.

SE49 - C... Support Svc 9/27/...

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

7. Once submitted, the DDEE form will show a TAU Status of **Received**, and is in their queue.

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

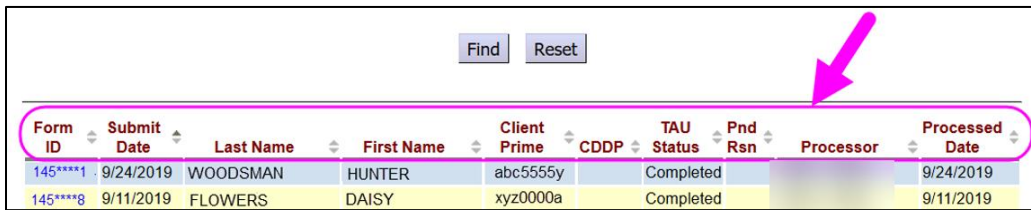
▼ **Client Information**

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**

8. 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.

Appendix A: Search Result Field Definitions



The screenshot shows a search interface with 'Find' and 'Reset' buttons. Below is a table with columns: Form ID, Submit Date, Last Name, First Name, Client Prime, CDDP, TAU Status, Pnd Rsn, Processor, and Processed Date. Two rows of data are visible. A pink arrow points to the Processor column header.

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			9/24/2019
145****8	9/11/2019	FLOWERS	DAISY	xyz0000a		Completed			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 and is in the queue for the TAU staff
 - **In-Process:** The TAU staff have begun working on 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 and pulled back by the CME
 - **Rejected:** The submitted form has been rejected by the TAU
 - **Completed:** The form coding and 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 and 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.