

User Roles and Permissions – Community Developmental Disabilities Program

This document outlines all roles available to Community Developmental Disabilities Programs, organized by the major types of work staff may need to perform. It explains what each role allows a user to do, and helps staff identify which roles best match specific job duties, especially in areas with multiple permission levels such as Preparer, Manager, and Super User.

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CDDP – Organizational Level Roles

What do you need to do?	Role	Permissions
Work with non-Case Management	Local Auth CPA Coordinator	View: Direct Service CPAs, Individual/Service information Run: Service & payment-related reports

Client Prior Authorizations	Local Auth CPA Preparer	<i>All CPA Coordinator Permissions, and also:</i> Create/Delete/Update: Direct Service CPAs
	Local Auth CPA Manager	<i>All CPA Preparer Permissions, and also -</i> Submit/Void: Direct Service CPAs
Work with Intergovernmental Agreements (IGAs) and Service Element Prior Authorizations (SEPAs)	Local Auth IGA Coordinator	<ul style="list-style-type: none"> • View: Contract and funding information (PAL, SEPA etc.) • Run: Contract and funding-related reports
	Local Auth IGA Manager	<i>Requires Approval by the Authorized Board Delegated Signatory. All IGA Coordinator Permissions, and also -</i> Accept/Reject/View: SEPA funding View: Individual, Provider, SIS Assessment Information Run: Various Payment and Enrollment reports
Work with Provider Prior Authorizations	Local Auth PPA Coordinator	View: Service Funding (SEPA, BA Lines etc.) Run: Service funding-related reports
Work with Provider Records	Local Auth Provider Viewer	View: Provider Panel, Limited provider information Run: Provider Status, CHC/PEAA Expire reports
	Local Auth Provider Panel Manager	Add/Update/Remove: Provider Panel; View: Provider Information Run: Provider-Site Expire reports
	Local Auth Provider EVV Exceptions Manager	Add/Update/Remove: PSW EVV Exceptions
View Specific Types of Information	Local Auth eXPRS View Only	View: Individual, Provider, Case Management and Direct CPA Services information

	Local Auth Service Coordinator Viewer	View: Case Management (SE48), RFFS Claims Run: RFFS reports
	SIS Local Auth Viewer	View: Individual SIS Assessments
	Local Auth PC20 Report Viewer	Run: PC20 report
	Local Auth eXPRS Report Access Only	Run: Various eXPRS reports
Work in the Plan of Care	Local Auth POC Viewer	View: Plans of Care, Plan Lines, Service Prior Authorizations, Service Delivered Billing Entries, Individual, Provider information Run: Plan of Care reports.
	Local Auth POC Preparer	<i>Includes all POC Viewer Permissions, and also:</i> Create/Save/Update/Delete: Draft Plan Lines & Service Prior Authorizations View: Claims
	Local Auth POC Manager	<i>Includes all POC Preparer permissions, and also:</i> Submit/Withdraw/Void: Plan of Care Plan Lines & Service Prior Authorizations
	Local Auth POC Super User	<i>Requires POC Super User training; max 3 staff per CDDP. Includes all POC Manager permissions, and also:</i> Split: Plan of Care Plan Lines and Service Prior Authorizations
Work with Service Delivered Billing Entries and Claims	Local Auth POC Claims Reviewer	Accept/Reject: Pending Service Delivered Billing Entries View: Plan of Care, Plan Line, Service Prior Authorization, Claims information
	Local Auth POC Claims Manager	<i>Includes POC Claims Reviewer permissions, and also:</i> Create/Delete/Update/Submit: Service Delivered Billing Entries; View: Individual, Provider information Run: Plan of Care reports

	Local Auth Claims Coordinator	View: Provider CPA claims; Direct Service CPAs, Individual/Service information Run: Service & payment-related reports
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CDDP – Case Management Level Roles

What do you need to do?	Role	Permissions
Work with Case Management Client Prior Authorizations	CM CPA Preparer	Create/Delete/Edit: Draft Case Management Client Prior Authorizations (SE48) View: Individual and Case Management Service Information Run: Case Management Service & RFFS Payment Reports
	CM CPA Manager	<i>Cannot be assigned with CM Encounter Manager. All CM CPA Preparer Permissions, and also -</i> Submit/Void: Case Management (SE48) Client Prior Authorizations
Work with Rationed Fee-For-Service Claims (RFFS)	CM Encounter Viewer	View: Case Management (SE48) RFFS claims, Individual and Case Management Service Information Run: Case Management Service & RFFS Payment Reports
	CM Encounter Manager	<i>Cannot be assigned with CM CPA Manager. All CM Encounter Viewer Permissions, and also -</i> Create/Delete/Update/Submit/Void: Case Management (SE48) RFFS claims
	CM Service Coordinator	No permissions. Adds name to dropdowns for RFFS claims, DDEE forms, etc.
Work with DD Eligibility	CDDP Eligibility Enrollment Viewer	View: DD Eligibility Enrollment (0337), Individual information Run: DD Eligibility Due Dates report

Enrollment Forms. Also called the DDEE or 0337 form	CDDP Eligibility Enrollment Preparer	<i>All Eligibility Enrollment Viewer Permissions, and also -</i> Create/Delete/Update: DD Eligibility Enrollment (0337)
	CDDP Eligibility Enrollment Processor	<i>All Eligibility Enrollment Preparer Permissions, and also -</i> Submit/Withdraw: DD Eligibility Enrollment (0337)
Work with an Individual's DD Eligibility	CDDP DD Eligibility Termination Processor	Update/Terminate: Existing DD Eligibility information
	CDDP Eligibility Specialist Processor	<i>For non-Eligibility Specialists doing eligibility data entry. All Eligibility Termination Processor Permissions, and also -</i> Create/Submit/Update: DD Eligibility information
	CDDP Eligibility Specialist	<i>For DD Eligibility Specialists only. All Eligibility Specialist Processor Permissions, and also -</i> Adds the DD Eligibility Specialist's name to dropdowns.
Work with Oregon Needs Assessments	CM ONA Viewer	View: Oregon Needs Assessment, Individual, Provider Plan of Care, Service Prior Authorization Information
	CM ONA SC	<i>Requires 3 ONA training certificates. User cannot also be assigned the ONA Assessor role. All ONA Viewer Permissions, and also -</i> Copy/Create/Delete/Update/Submit: Oregon Needs Assessments
	CM ONA Assessor	<i>Requires in-person ODDS training; User cannot also be assigned the ONA SC role. All ONA Viewer Permissions, and also -</i> Copy/Create/Delete/Update/Submit: Oregon Needs Assessments