



Local Authority/CDDP User Enrollment Form

INSTRUCTIONS: * indicates required fields. The authorizing manager must complete this form based on the employee's specific job duties. Incomplete or illegible forms will not be processed. You may not be notified.

- Send completed form to info.exprs@dhsosha.state.or.us or fax to 503-947-5044.

*Indicate Action: <input type="checkbox"/> Add User <input type="checkbox"/> Modify User <input type="checkbox"/> Deactivate User <input type="checkbox"/> Change of Info	
*User's Name: (Last, First MI) <i>please print</i>	If user has one, please include your eXPRS login name:
*Job Title:	*Name of County/Organization or Contract #:
*Organization Address: (Mailing Address)	*City, State, Zip:
*Requesting access for the following county(ies):	
*Phone Number:	*Email Address:

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

Local Authority Contracting Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth IGA Manager – <i>requires completion/submission of separate Local Auth IGA Manager enrollment form to add user role.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth IGA Coordinator – <i>able to view contract funding related information, such as PAL, SEPA etc., and run various reports.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth PPA Coordinator - <i>able to view service funding related information, such as SEPA, BA Lines, etc., and run various reports.</i>

Local Authority CPA Services Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth CPA Manager - <i>able to <u>Create/Delete/Submit/Update/Void</u> client service CPAs, view related client and service information, run service and payment report.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth CPA Preparer - <i>able to <u>Create/Delete/Update</u>, but not Submit/Void client service CPAs, view related client and service information, run service and payment report.</i>

<input type="checkbox"/>	<input type="checkbox"/>	Local Auth CPA Coordinator - able to <u>only view</u> client service CPAs, and view related client and service information, run service and payment report.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth Claims Coordinator - able to <u>only view</u> provider claims information for client CPA services, and view related client and service information, run service and payment reports.
Local Authority Plan of Care Roles		
ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	<p>Local Auth POC Super User¹ - able to <u>Create/Delete/Update/Submit/Withdraw/Void</u> + <u>SPLIT</u> POC Plan Lines and Service Prior Auths (SPAs); able to <u>Create/Delete/Update/Submit</u> + <u>VOID</u> POC Service Delivered (SD) billings; view associated claims information; view client, provider & ER information; run various POC related reports.</p> <p>¹<i>Successful completion of POC Super User training required prior to role assignment. Please submit certificate of training completion with this UEF. Enrollment of users with this role is limited to 3 staff per CDDP.</i></p>
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth POC Manager - able to <u>Create/Delete/Update/Submit/Withdraw/Void</u> Plan of Care Plan Lines and Service Prior Auths (SPAs); view POC Service Delivered (SD) billing & associated claims information; view client, provider & ER information; run various POC related reports.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth POC Preparer - able to <u>Create/Save/Update/Delete</u> <i>draft</i> Plans of Care, Plan Lines and Service Prior Auths (SPAs) only; not able to submit or make edits once the PL/SPA is out of draft status ; view POC Service Delivered (SD) billing & associated claims information; view client, provider & ER information; run various POC related reports.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth POC Viewer - able to only view Plans of Care, Plan Lines and Service Prior Auths (SPAs); view POC Service Delivered (SD) billing & associated claims information; view client, provider & ER information; run various POC related reports.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth POC Claims Manager - able to <u>Create/Delete/Update/Submit</u> POC Service Delivered (SD) billings; view associated claims information; view POC, Plan Line & SPA information; view client, provider & ER information; run various POC related reports.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth POC Claims Reviewer - able to <u>Accept/Reject</u> "pending" Service Delivered (SD) billings; view associated claims information; view POC, Plan Line & SPA information.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth Provider Panel Manager - able to <u>Add/Update/Remove</u> providers from the POC Provider Panel; able to view provider record information; able to run the Provider Status report, the CHC/PEAA Expire report and the Provider/Site Expire report.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth Provider Viewer - able to view POC Provider Panel; able to view limited provider record information; able to run the Provider Status report, the CHC/PEAA Expire report.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth Provider EVV Exceptions Manager - able to <u>Add/Update/Remove</u> EVV Exceptions information for PSW Providers.

Local Authority View Only Roles		
ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	SIS Local Auth Viewer - able to view Client SIS Assessment
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth eXPRS View Only - able to <u>view only</u> client, CM and CPA services information; view provider information.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth eXPRS Report Access Only - able to run various eXPRS reports.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth Service Coordinator Viewer - able to <u>view only</u> CM SE48 information; view RFFS Claims; run RFFS reports.
<input type="checkbox"/>	<input type="checkbox"/>	Local Auth PC20 Report Viewer - able to run PC20 report.

CDDP Case Management User Roles (assign to County CM Provider):

Case Management Services Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	CM Service Coordinator – adds name of Service Coordinator to applicable system dropdowns for selection on RFFS claims, DDEE forms, etc. <u>No user system access permissions associated with this role.</u>
<input type="checkbox"/>	<input type="checkbox"/>	CM CPA Manager² - able to <u>Create/Delete/Submit/Update/Void</u> client SE48 CM service CPAs; view related client and CM service information; run CM service and CM/RFFS payment reports. ²The same user should not have this role & <u>CM Encounter Manager</u> role assigned at the same time.
<input type="checkbox"/>	<input type="checkbox"/>	CM CPA Preparer - able to <u>Create/Delete/Update</u> , but not <u>Submit/Void</u> SE48 CM service CPAs; view related client and CM service information; run CM service and CM/RFFS payment reports.
<input type="checkbox"/>	<input type="checkbox"/>	CM Encounter Manager³ - able to <u>Create/Delete/Update/Submit/Void</u> SE48 CM RFFS claims; view related client and CM service information; run CM service and CM/RFFS payment reports. ³The same user should not have this role & <u>CM CPA Manager</u> role assigned at the same time.
<input type="checkbox"/>	<input type="checkbox"/>	CM Encounter Viewer - able to <u>View Only</u> SE48 CM RFFS claims; view related client and CM service information; run CM service and CM/RFFS payment reports.

DD Eligibility Enrollment (0337) Form Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	CDDP Eligibility Enrollment Processor - able to <u>Create/Delete/Submit/Update/Withdraw</u> DD Eligibility Enrollment (0337) form; view client information; run DD Eligibility Due Dates report.
<input type="checkbox"/>	<input type="checkbox"/>	CDDP Eligibility Enrollment Preparer - able to <u>Create/Delete/Submit/Update/Withdraw</u> , but not <u>Submit</u> DD Eligibility Enrollment (0337) form; view client information; run DD Eligibility Due Dates report.

<input type="checkbox"/>	<input type="checkbox"/>	CDDP Eligibility Enrollment Viewer - able to <u>view only</u> DD Eligibility Enrollment (0337) form; view client information; run DD Eligibility Due Dates report.
--------------------------	--------------------------	---

DD Eligibility Information Entry Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	CDDP Eligibility Specialist⁴ - add DD Eligibility Specialist's name to dropdowns; able to Create/Submit/Update DD eligibility information on the CLIENT page in eXPRS. <i>⁴This role is for DD Eligibility Specialists only.</i>
<input type="checkbox"/>	<input type="checkbox"/>	CDDP Eligibility Specialist Processor⁵ - able to <u>Create/Submit/Update</u> DD eligibility information on the CLIENT page in eXPRS. <i>⁵This role is for other CDDP staff that are not DD Eligibility Specialists, but are doing DD eligibility data entry work.</i>
<input type="checkbox"/>	<input type="checkbox"/>	CDDP DD Eligibility Termination Processor - able to <u>Update & Terminate</u> DD eligibility information on the CLIENT page in eXPRS, but not <u>Create/Submit new DD eligibility</u> information.

Oregon Needs Assessment (ONA) Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	CM ONA SC⁶ - able to <u>Copy/Create/Delete/Update/Submit</u> Oregon Needs Assessment; view client, POC, SPA, provider information. <i>⁶This role cannot be assigned until the user completes/sends in their three required ONA training certificates along with completed User Enrollment Form.</i>
<input type="checkbox"/>	<input type="checkbox"/>	CM ONA Assessor⁷ - able to <u>Copy/Create/Delete/Update/Submit</u> Oregon Needs Assessment; view client, POC, SPA, provider information. <i>⁷This role cannot be assigned until the user completes required in-person training with ODDS.</i>
<input type="checkbox"/>	<input type="checkbox"/>	CM ONA Viewer - able to <u>View</u> Oregon Needs Assessment, client, POC, SPA, provider information.

Signature

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

STATE SECURITY ADMINISTRATOR USE ONLY

Name:

Date Completed:

/ /

Maintain form in local file for audit purposes.