



Office for People With Developmental Disabilities

CHOICES Navigation User Guide

Navigation

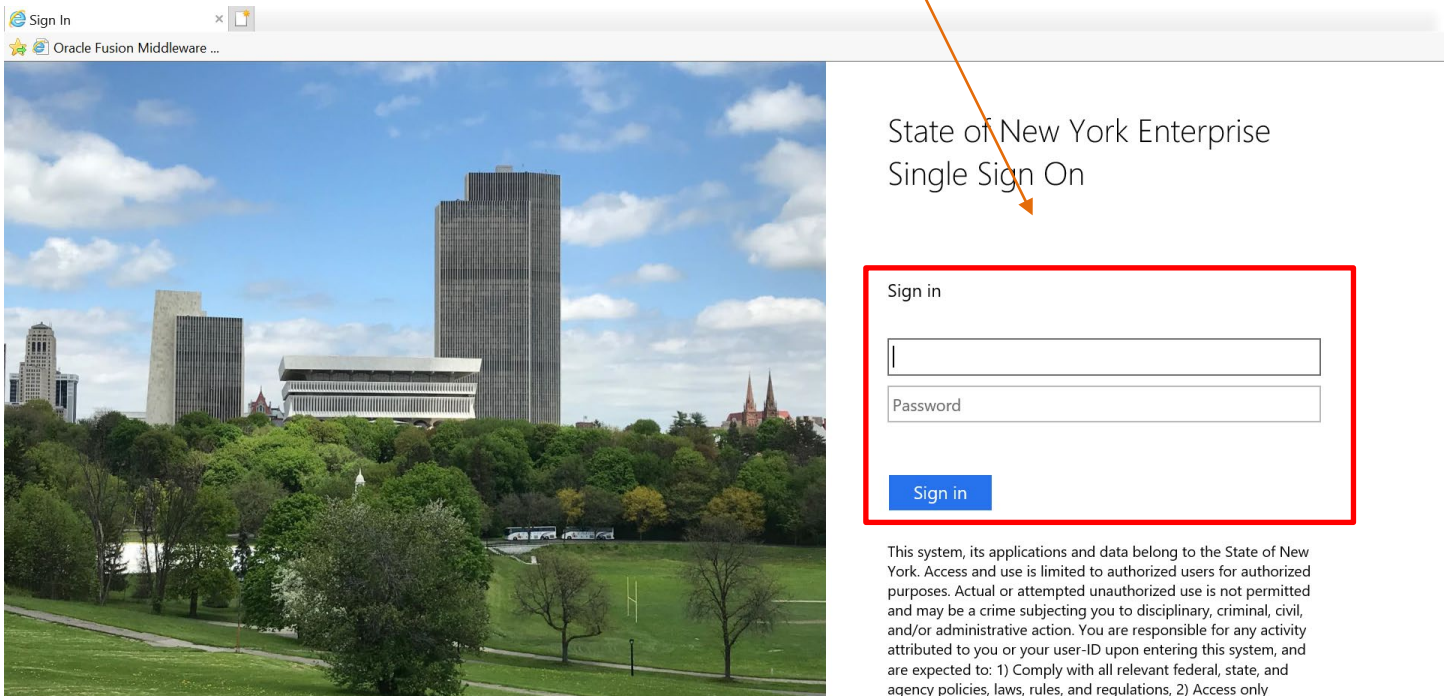
(The personal information and accompanying data shown in this guide are fictional and are used for illustrative purposes only.)

This section will familiarize the user on how to navigate through the CHOICES System. Additional information on specific screens can be found in other user guides.

Sign In

To Sign into CHOICES, use the following URL: <https://choices.opwdd.ny.gov>

and enter your username and password. This is the same login if you are an OPWDD user. If you are a voluntary agency user, you will be given a user name and password when you are notified of access.



State of New York Enterprise
Single Sign On

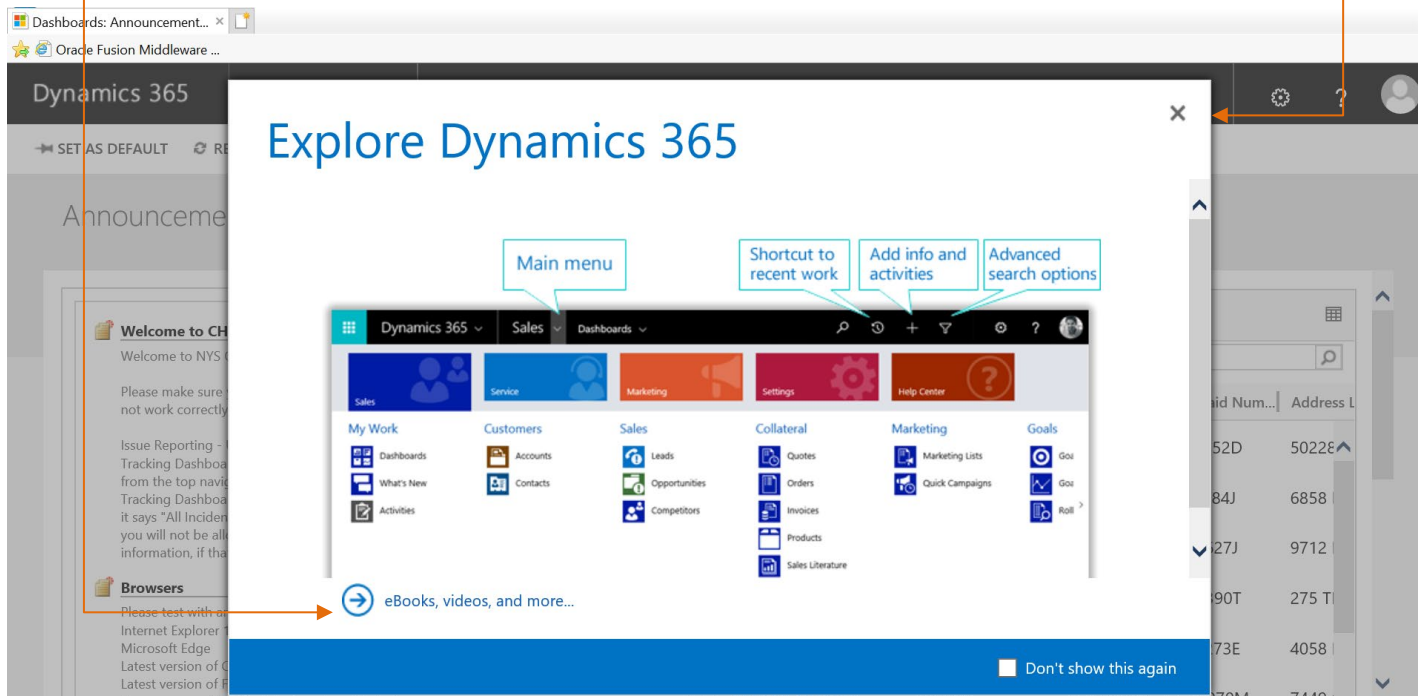
Sign in

Password

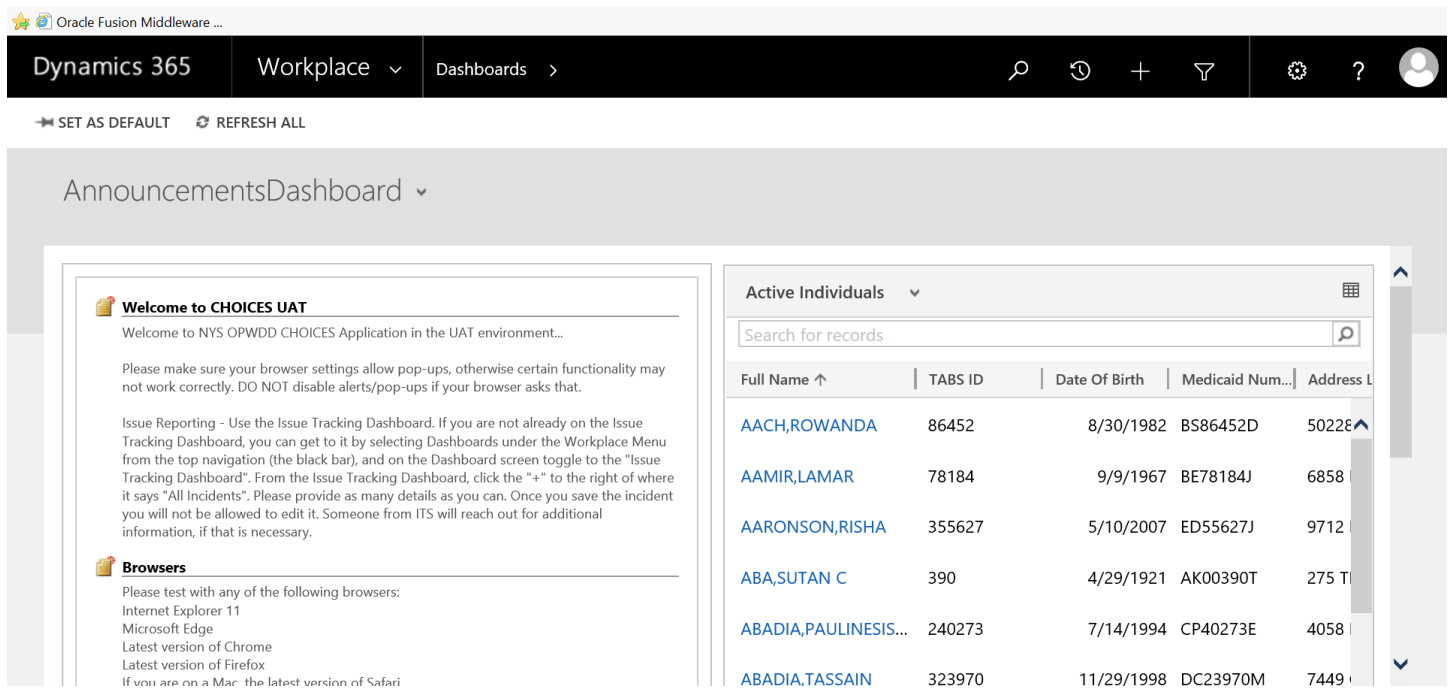
Sign in

This system, its applications and data belong to the State of New York. Access and use is limited to authorized users for authorized purposes. Actual or attempted unauthorized use is not permitted and may be a crime subjecting you to disciplinary, criminal, civil, and/or administrative action. You are responsible for any activity attributed to you or your user-ID upon entering this system, and are expected to: 1) Comply with all relevant federal, state, and agency policies, laws, rules, and regulations, 2) Access only

Once logged in, the [Explore Dynamics 365](#) screen will appear. If interested, click on the blue circled right arrow for more information. If not, click the X in the top right corner to close the screen.



The dashboard screen for CHOICES and a list of individuals will appear. The dashboard screen shows important announcements that affect CHOICES users.



To change your default home screen, click the arrow next to the Announcements Dashboard and a drop down of options will appear. Choose one of the options from the drop down to change the home screen view.

The screenshot shows the Oracle Fusion Middleware Dynamics 365 Workplace interface. The top navigation bar includes 'Dynamics 365', 'Workplace', and 'Dashboards'. Below the navigation bar, there are buttons for 'SET AS DEFAULT' and 'REFRESH ALL'. The 'AnnouncementsDashboard' is highlighted with a red oval, and a dropdown menu is open, listing various system dashboards. An orange arrow points from the text above to the dropdown arrow. To the right, there is a table titled 'Active Individuals' with columns for Full Name, TABS ID, Date Of Birth, Medicaid Num..., and Address L.

Full Name ↑	TABS ID	Date Of Birth	Medicaid Num...	Address L
AACH,ROWANDA	86452	8/30/1982	BS86452D	50228
AAMIR,LAMAR	78184	9/9/1967	BE78184J	6858
AARONSON,RISHA	355627	5/10/2007	ED55627J	9712
ABA,SUTAN C	390	4/29/1921	AK00390T	275 T
ABADIA,PAULINESIS...	240273	7/14/1994	CP40273E	4058
ABADIA TASSAIN	323970	11/29/1998	DC23970M	7449

To return to the Dashboard/Home screen at anytime, click Workplace:

Navigation

The following are the major areas of the CHOICES application:

- The Workplace Menu or navigation tiles move you around inside the application. Items displayed in the Workplace Menu are based on whether you are an Agency or DDSO staff and the role you have within CHOICES
- The content pane displays whatever screen you have moved to in the Workplace Menu
- Advanced Find is a query and report creator.
- Display of the user signed on to the system and where to sign-out.

The screenshot shows the top navigation bar of the CHOICES application. The 'Workplace' menu is highlighted with a red box. To its right, there are icons for 'Active Individuals' (a person icon with a plus sign), a search icon, a refresh icon, and a user profile icon. Below the navigation bar, the 'AnnouncementsDashboard' is visible, containing a 'Welcome to CHOICES UAT' message and a table of 'Active Individuals'.

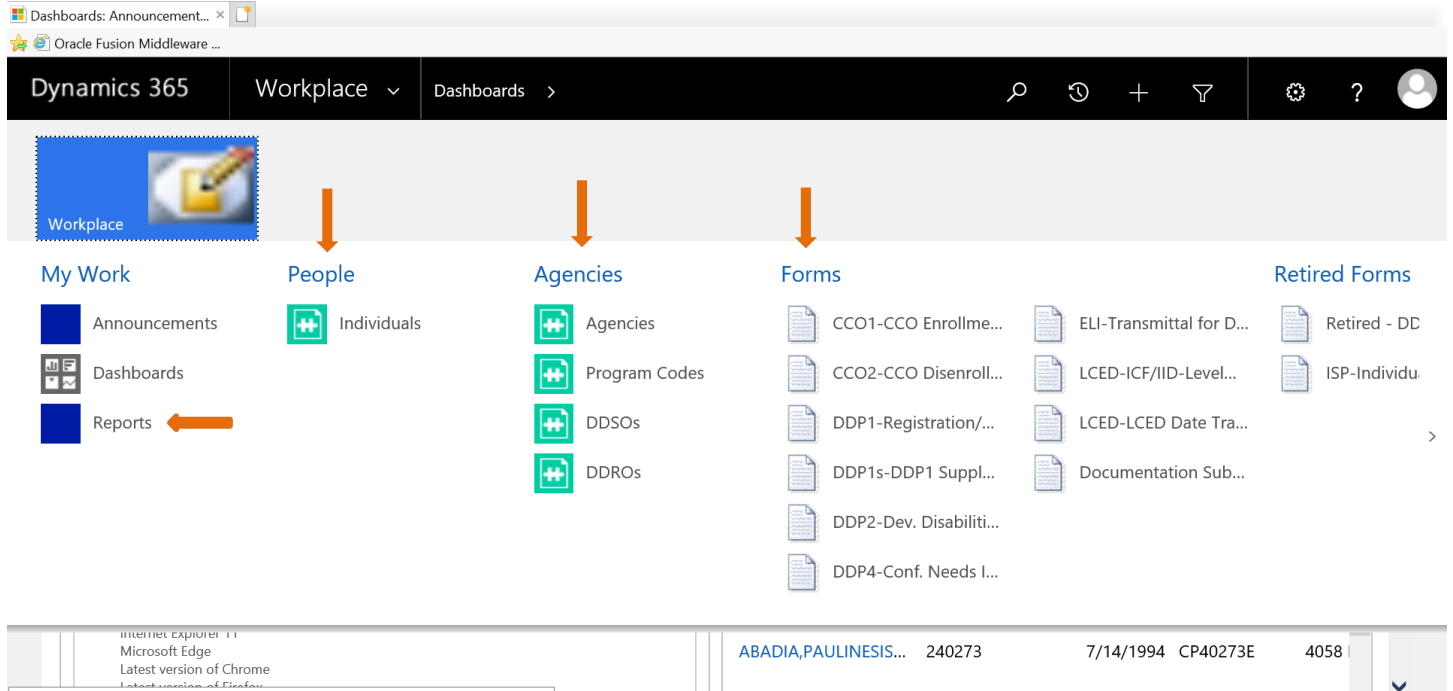
Full Name ↑	TABS ID	Date Of Birth	Medicaid Num...	Address L
AACH,ROWANDA	86452	8/30/1982	BS86452D	5022E
AAMIR,LAMAR	78184	9/9/1967	BE78184J	6858
AARONSON,RISHA	355627	5/10/2007	ED55627J	9712
ABA,SUTAN C	390	4/29/1921	AK00390T	275 T
ABADIA,PAULINESIS...	240273	7/14/1994	CP40273E	4058
ABADIA,TASSAIN	323970	11/29/1998	DC23970M	7449

To move to (or display) another section or form, click the down arrow next to Workplace at the top of the screen.

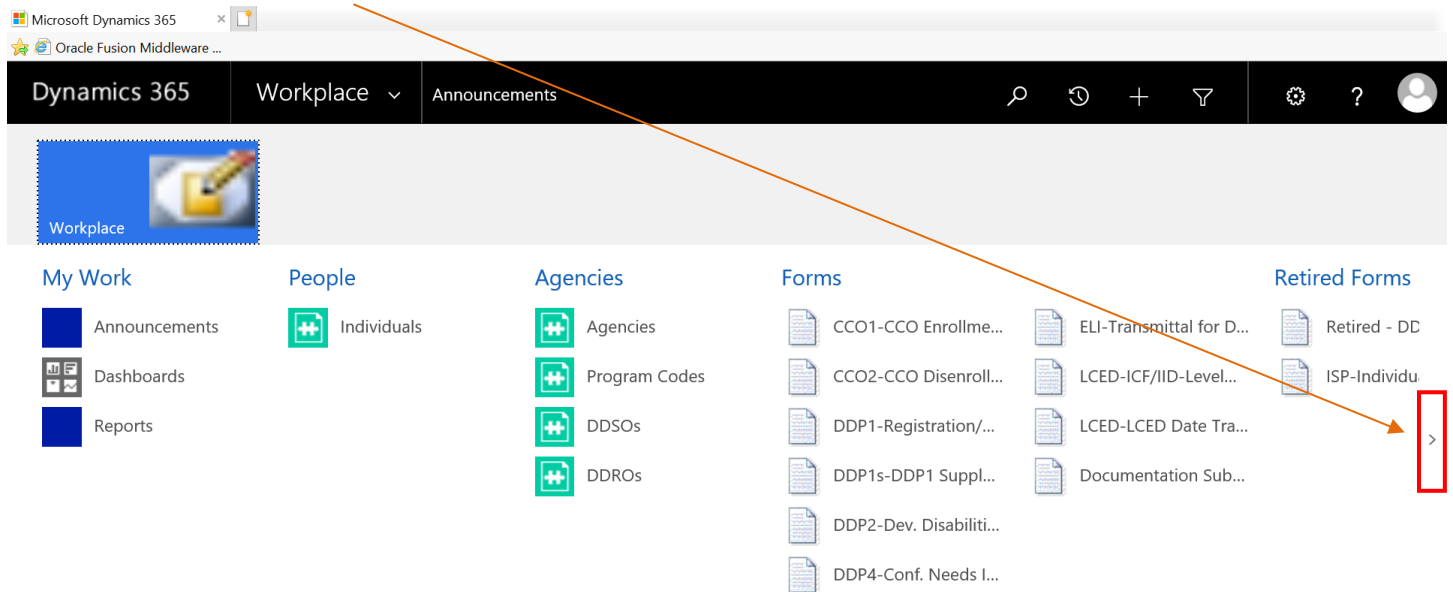
The screenshot shows the top navigation bar of the CHOICES application. The 'Workplace' menu is highlighted with a red circle, and an orange arrow points to it from the text above. Below the navigation bar, the 'AnnouncementsDashboard' is visible, containing a 'Welcome to CHOICES UAT' message and a table of 'Active Individuals'.

Full Name ↑	TABS ID	Date Of Birth	Medicaid Num...	Address L
AACH,ROWANDA	86452	8/30/1982	BS86452D	5022E
AAMIR,LAMAR	78184	9/9/1967	BE78184J	6858
AARONSON,RISHA	355627	5/10/2007	ED55627J	9712
ABA,SUTAN C	390	4/29/1921	AK00390T	275 T
ABADIA,PAULINESIS...	240273	7/14/1994	CP40273E	4058

Once you click on the down arrow, a list of tiles will drop down. This is how you Navigate to Reports, People, Agencies and Forms.



You can use the arrow on the left to scroll to more Tiles/Sections.



Agencies Section

In the Agencies section you can find information about **Agencies**, **Program Codes** and **DDSOs**. The ability to view certain information depends on if you are a voluntary agency user or an OPWDD user.

To view this section, click on the arrow next to Workplace and then select the desired screen.

Oracle Fusion Middleware ...

Dynamics 365 Workplace DDP1-Registration/... >

Workplace

My Work

- Announcements
- Dashboards
- Reports

People

- Individuals

Agencies

- Agencies
- Program Codes
- DDSOs
- DDROs

Forms

- CCO1-CCO Enrollme..
- CCO2-CCO Disenroll..
- DDP1-Registration/...
- DDP1s-DDP1 Suppl...
- DDP2-Dev. Disabiliti...
- DDP4-Conf. Needs I...

Select a record by clicking on the name of the record to open. These are in blue.

Oracle Fusion Middleware ...

Dynamics 365 Workplace > Agencies >

EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

Active Agencies

<input type="checkbox"/>	Agency Name ↑	Agency Code...	Address Line 1	City
	PARKCHESTER/BRONXDALE DAY CARE	62410	1880 WATSON AVENUE	BRONX
	0225 - SUNMOUNT DDSO	51420	2445 STATE ROUTE 30	TUPPER LAKE
	0227 - LONG ISLAND	51350	45 MALL DRIVE	COMMACK
	0230 - BERNARD FINESON	51470	P.O. BOX 280507	QUEENS VILL...
	0233 - BROOME	51940	249 GLENWOOD ROAD	BINGHAMTON
	0235 - BROOKLYN	51380	888 FOUNTAIN AVENUE	BROOKLYN

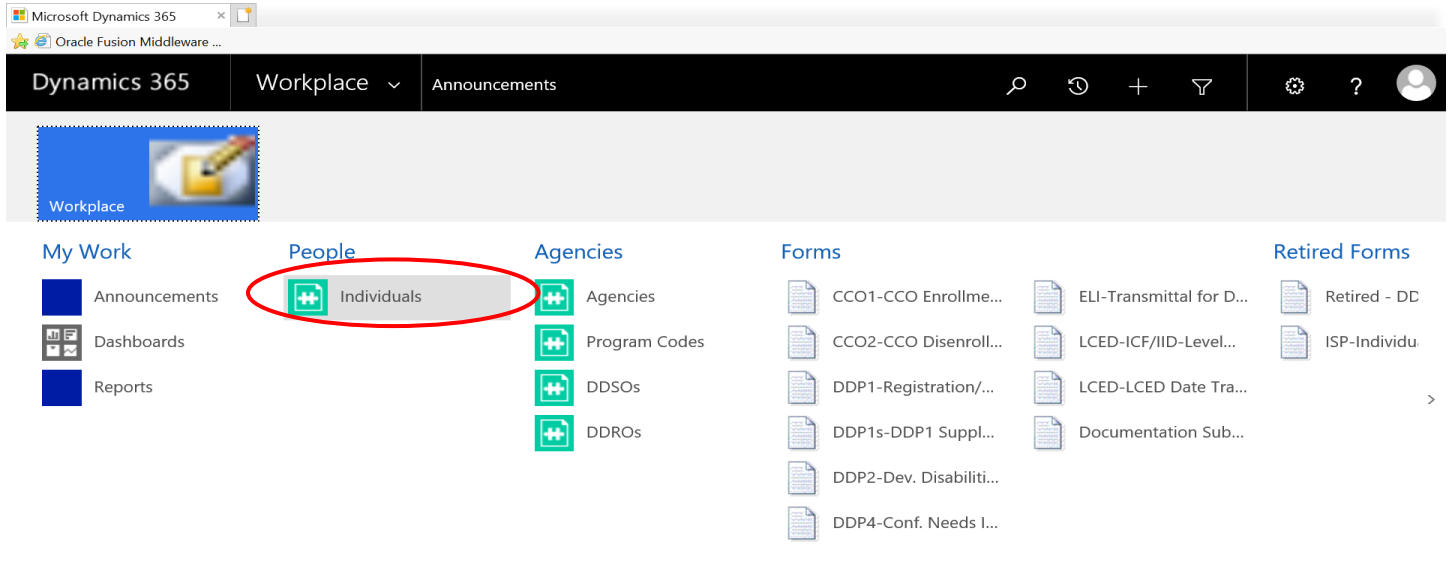
Once any record is open, you can access information like TABS Inquiries and Program Codes by clicking the dropdown arrow. Highlight and click on any section, to move to that section.

The screenshot shows the Dynamics 365 interface. At the top, there is a navigation bar with 'Dynamics 365', 'Workplace', and 'Agencies > 0225 - SUNMOUNT...' with a dropdown arrow circled in red. Below this, there are two main sections: 'Common' and 'Process Sessions'. Under 'Common', 'TABS Inquiries' is highlighted with a red oval. Other options include 'Activities', 'Closed Activities', and 'Program Codes'. Under 'Process Sessions', there are 'Background Processes' and 'Real-time Processes'. Below the navigation is a table with the following data:

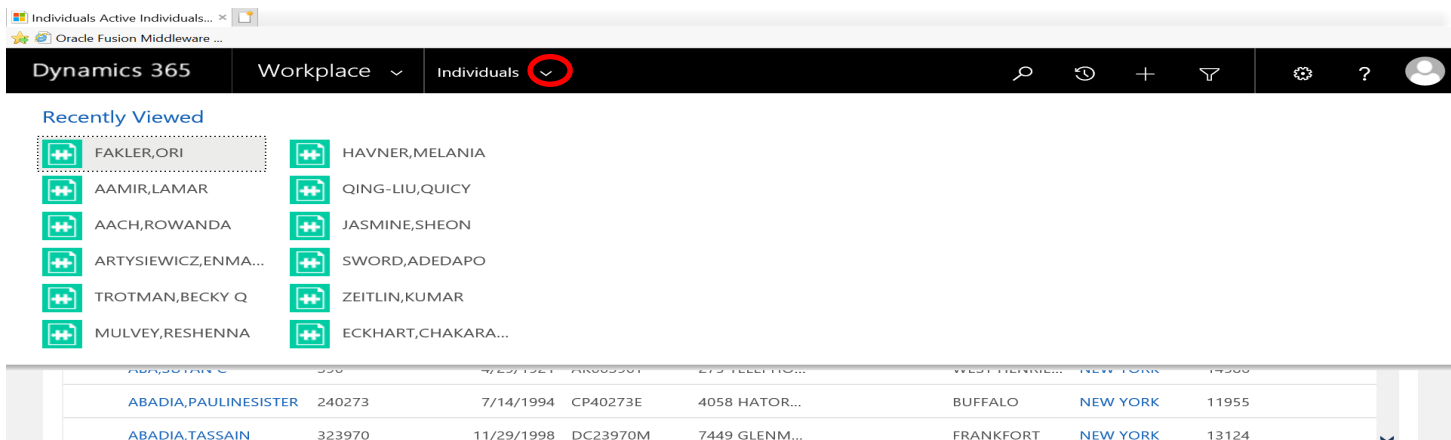
Is this a DDSO? *	Yes	DDSO	SUNMOUNT DDSO
Corp	51420	Sector	STATE
Address Line 1	2445 STATE ROUTE 30	Address Line 2

Individuals Section

In this example, we are moving from Workplace to the Individuals screen. Click the Individuals Tile.



To view any recent records, click the arrow next to Individuals. A dropdown of recently viewed records will appear.



For voluntary agency users, the Individuals section displays everyone that is served by that agency. For OPWDD users, all individuals will be displayed.

In the box to the right above the list of Individuals, type the last and first name of the Individual using a comma and no spaces or type the TABS ID click the Enter key or click the Find icon.

The screenshot shows the Dynamics 365 interface for the 'Individuals' section. At the top, there is a search bar with a magnifying glass icon. Below the search bar is a table of individuals. The table has columns for Full Name, TABS ID, Date Of Birth, Medicaid Nu., Address Line, Address City, Address State, and Address Zip. The first row is highlighted in blue.

Full Name ↑	TABS ID	Date Of Birth...	Medicaid Nu...	Address Line...	Address Line...	Address City	Address State...	Address Zipc...
AACH,ROWANDA	86452	8/30/1982	BS86452D	50228 BROE...	7563 BELLAM...	PERRYSBURG	NEW YORK	08012
AAMIR,LAMAR	78184	9/9/1967	BE78184J	6858 EASTEN...	5528 MEDLEY...	UTICA	NEW YORK	14621-2823
AARONSON,RISHA	355627	5/10/2007	ED55627J	9712 BALKE a...		WYNANTSKILL	NEW YORK	14736
ABA,SUTAN C	390	4/29/1921	AK00390T	275 TELEPHO...		WEST HENRIE...	NEW YORK	14586
ABADIA,PAULINESISTER	240273	7/14/1994	CP40273E	4058 HATOR...		BUFFALO	NEW YORK	11955
ABADIA,TASSAIN	323970	11/29/1998	DC23970M	7449 GLENM...		FRANKFORT	NEW YORK	13124

The names that match that search appear in the list.

From the list of Individuals displayed by last name, click on the correct Individual's name (in blue) to open their record.

The screenshot shows the Dynamics 365 interface for the 'Individuals' section. The search bar contains the text 'smith'. Below the search bar is a table of search results. The first row is highlighted in blue and circled in red.

Full Name ↑	TABS ID	Date Of Birth...	Medicaid Nu...	Address Line...	Address Line...	Address City	Address State...	Address Zipc...
SMITH,ARTHUR	142581	2/4/1958	AN42581F	7601 HOELTZ...	3300 WEDGE...	GOUVERNEUR	NEW YORK	10745
SMITH-CABREJA,AAG...	349686	9/15/1959	EH49686H	1733 FREDRI...		LOUDONVILLE	NEW YORK	54220
SMITH-CABREJA,TILER	16143	2/15/1936	AV16143R	2229 N. TRIP...	CAYUGA HEI...	ITHACA	NEW YORK	14850
SMITHGALL,VIC	142739	7/14/1991	CF42739A	24559 SCОВI...		LANSINGSBU...	NEW YORK	92503
SMITH-JOHNSON,TA...	288120	2/6/1942	AA88120W	4326 DOUE G...	1770 OXHEA...	SARATOGA S...	NEW YORK	18844
SMITH-PALAZZO,CHA...	65490	2/12/1951	AP65490G	3720 BEARKIL...		BUFFALO	NEW YORK	76667

Once the Individual's record is opened, you can use the tiles at the top to navigate to the screen or Form you wish to access.

The screenshot shows the Dynamics 365 user interface. At the top, the navigation bar includes 'Dynamics 365', 'Workplace', and 'Individuals > SMITH,ARTHUR'. A red circle highlights the dropdown arrow next to the name. Below the navigation bar are three columns of tiles: 'Common', 'Retired Forms', and 'Process Sessions'. The 'Common' column includes tiles for 'Supporting Documents', 'Activities', 'Closed Activities', 'TABS Inquiries', 'Program Enrollments', and 'CCO1-CCO Enrollme...'. The 'Retired Forms' column includes 'CCO2-CCO Disenroll...', 'DDP1 - Registration...', 'DDP1s - DDP1 Supp...', 'DDP2 - Dev. Disabili...', 'DDP4 - Conf. Needs...', and 'ELI-Transmittals for...'. The 'Process Sessions' column includes 'Background Processes' and 'Real-time Processes'. Below the tiles, a table displays individual record details:

Date Of Birth *	2/4/1958	Sex	Female
Ethnicity	...		

Finding a Form or Screen Via the Individual's Record

Click the arrow next to the person's name to view the list of available forms and screens. Click on the screen or form. For this example, we will click on **DDP1 – REGISTRATION...**

The screenshot shows the Dynamics 365 interface for an individual record. The breadcrumb navigation is 'Individuals > SMITH,ARTHUR'. The main content area is divided into three sections: 'Common', 'Retired Forms', and 'Process Sessions'. In the 'Common' section, the 'DDP1 - Registration...' form is highlighted with a red circle. Below the forms, there is a table of individual information.

Date Of Birth *	2/4/1958	Sex	Female
Ethnicity	White		

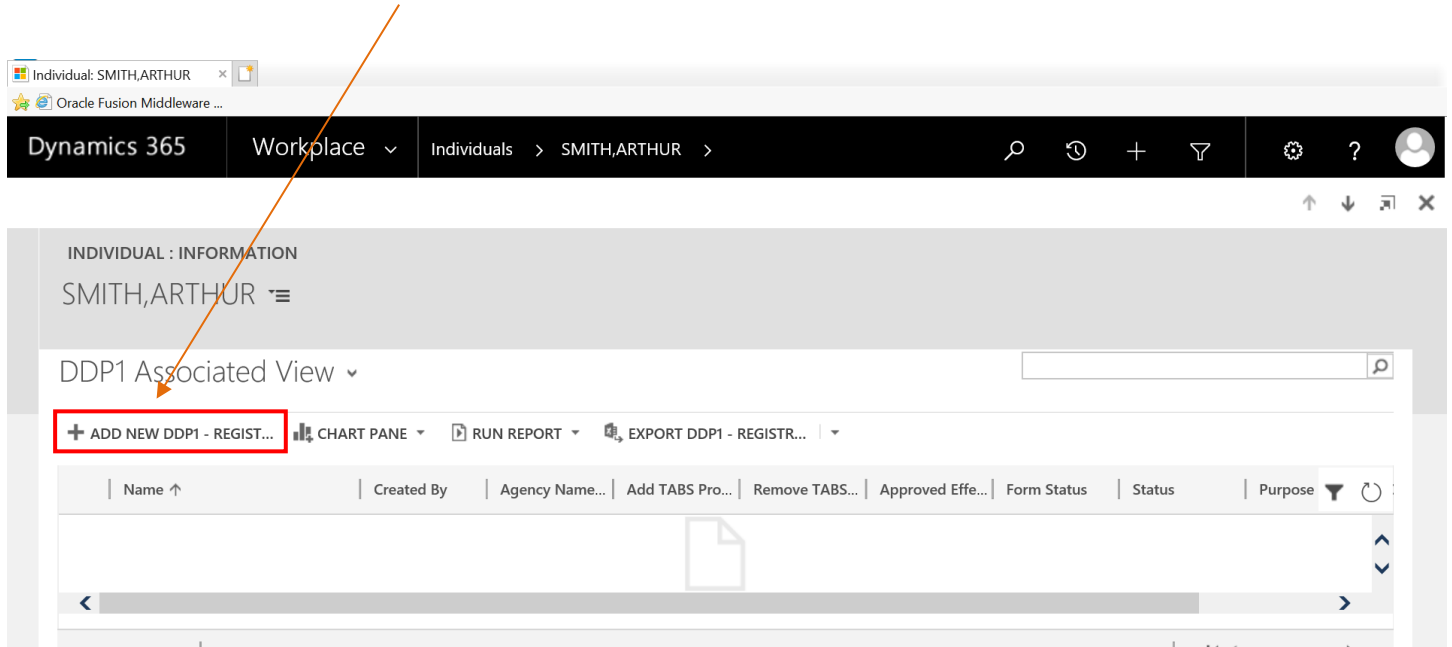
The DDP1 form will open and any forms created for the individual will also be appear.

The screenshot shows the Dynamics 365 interface for an individual record. The breadcrumb navigation is 'Individuals > ABDULLAH-MUSA,S...'. The main content area is titled 'INDIVIDUAL : INFORMATION' and 'ABDULLAH-MUSA,SHAWCAR'. Below this, there is a section titled 'DDP1 Associated View'. The view shows a table of DDP1 forms associated with the individual.

Name	Created By	Agency Name	Add TABS Pro...	Remove TABS ...	Approved Effe...	Form Status	Status	Purpose	Created On
DDP1 for ABDULLAH-MUSA...	Anne Swart...	ADVANCE C...				Submitted	Active	Demograph...	3/31/2021 10:2...

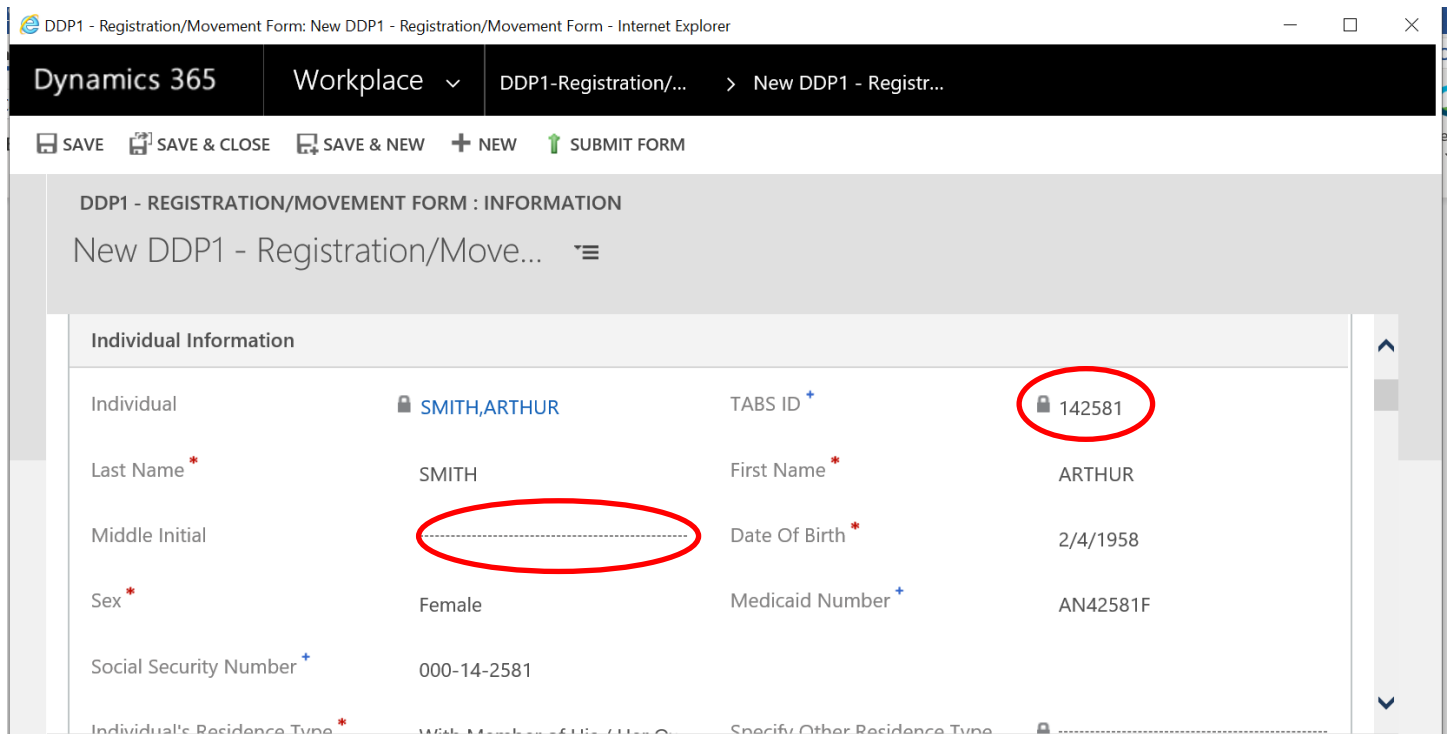
Working in Forms

To start a new form, click **ADD NEW DDP1 – REGIST....**

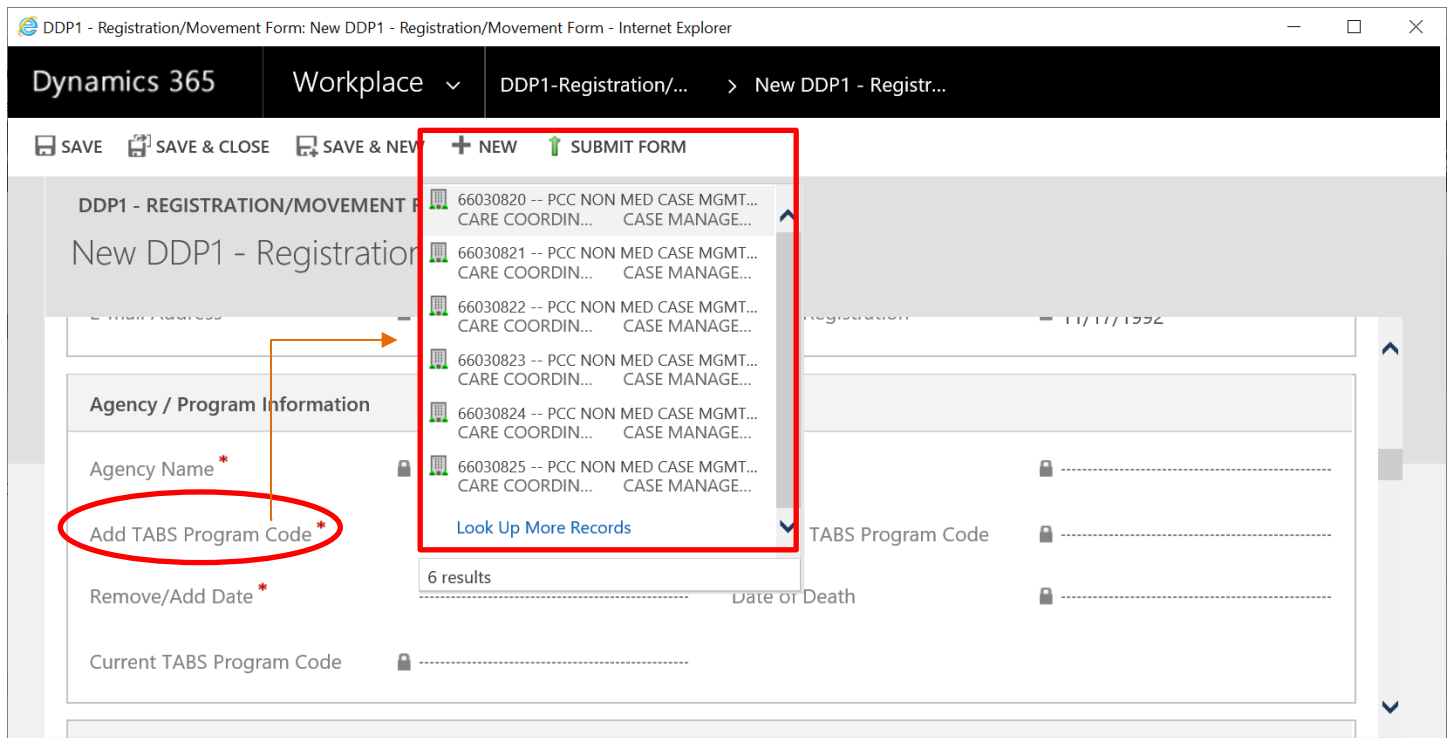


This will open a new DDP1 for this person.

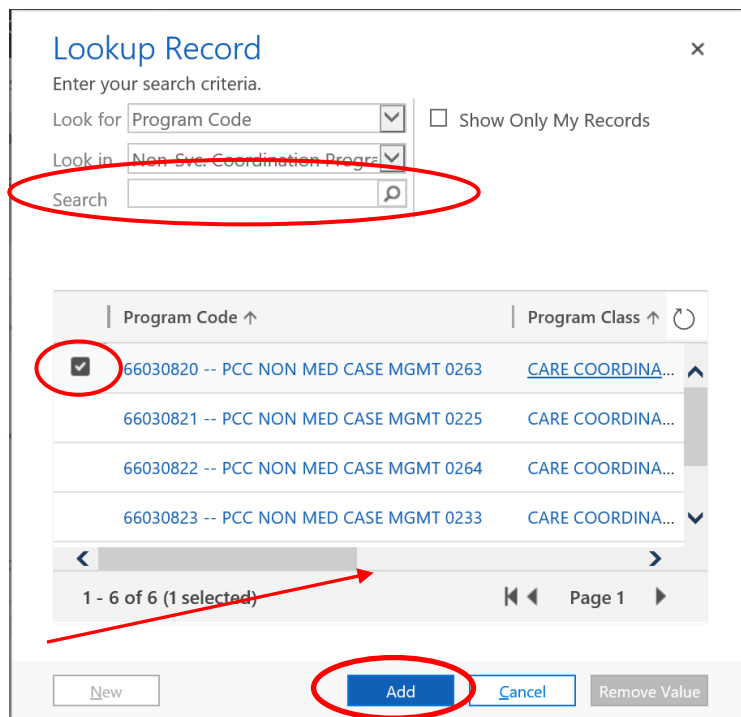
Fields that have a dotted line are fields that you can fill in. Fields that have a padlock icon are locked and you cannot edit them.



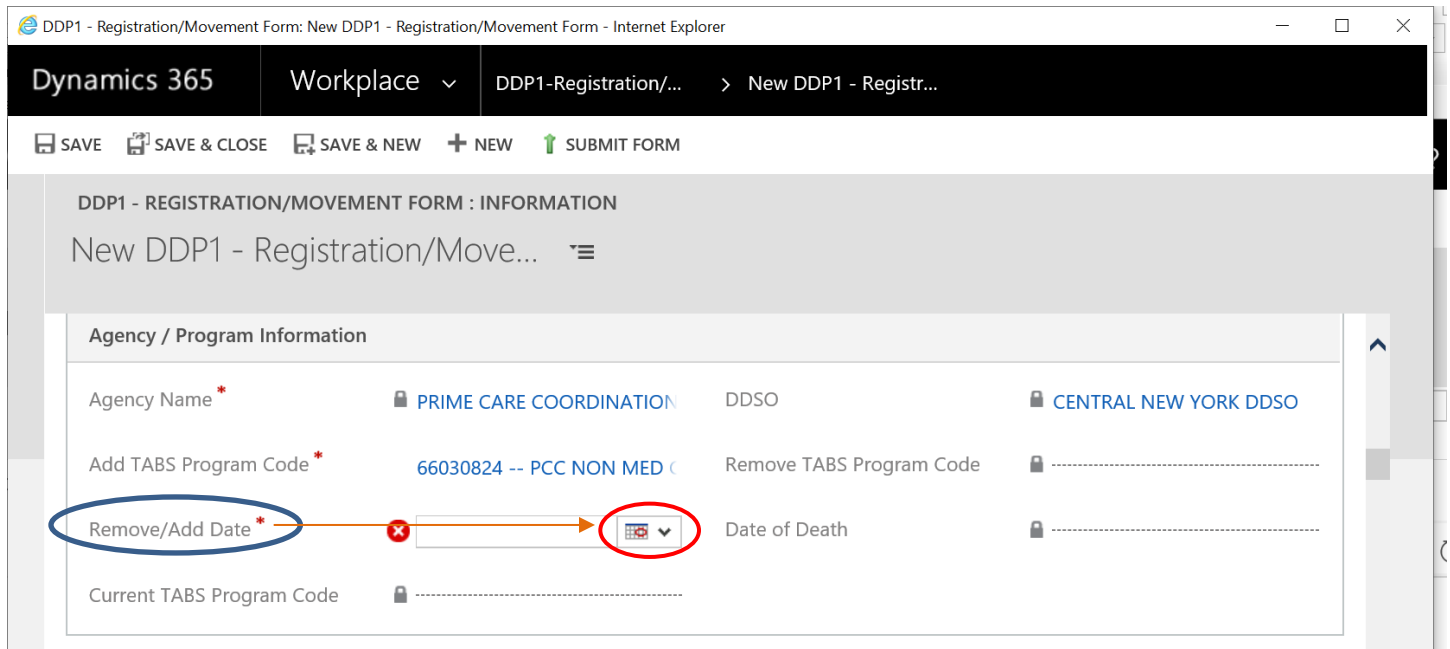
Other fields will have selections that have drop downs. If you do not see the selection you wish to make, scroll to the bottom of the list and click **Look Up More Records**. See the **Add TABS Program Codes** for an example.



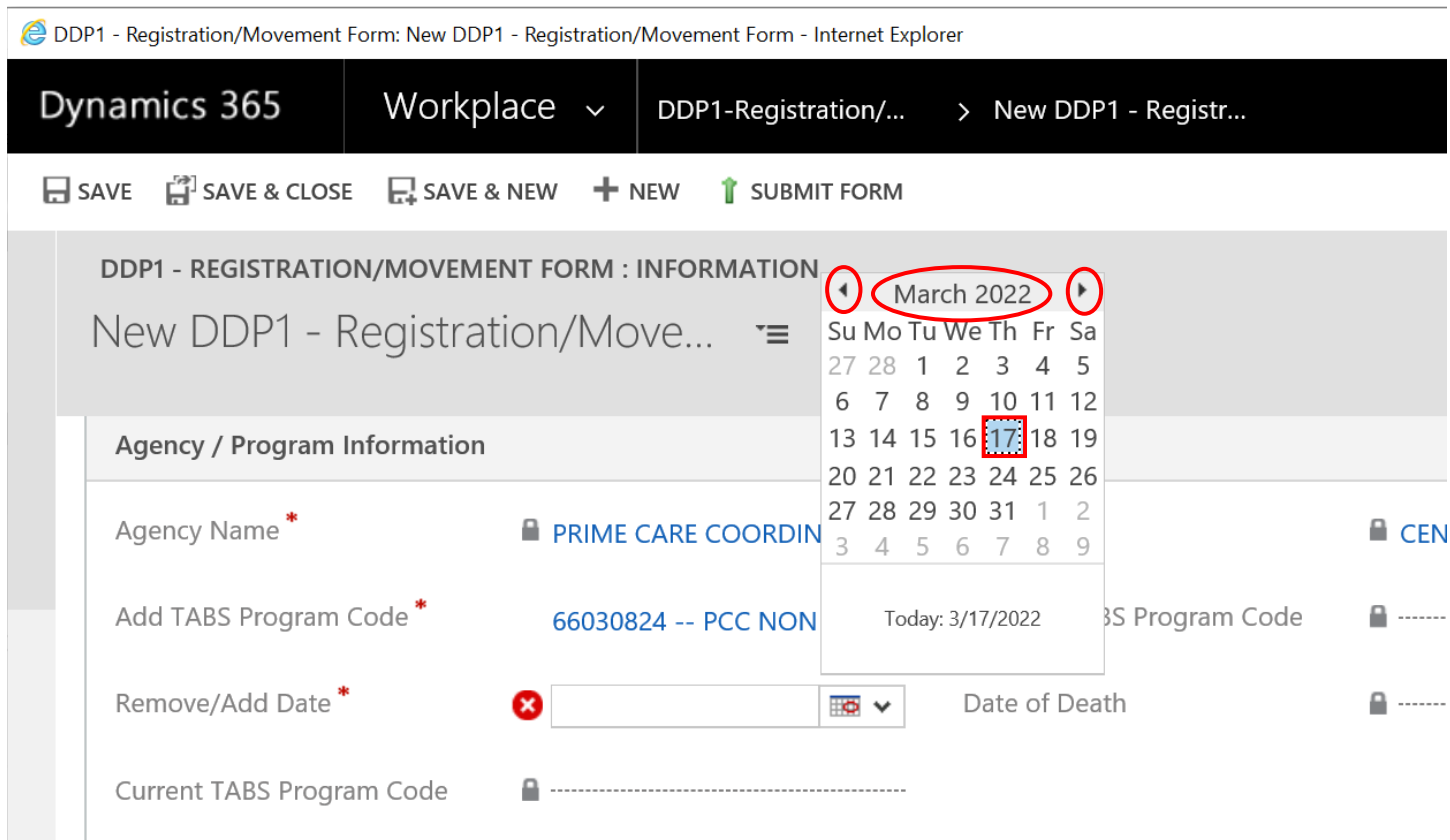
From the Look Up Records popup, you can search for the program code in the Search box select the Program you would like by clicking to the left of the box and then click Add, to add that record to the **Add TABS Program Code** field. You will then return to the form.



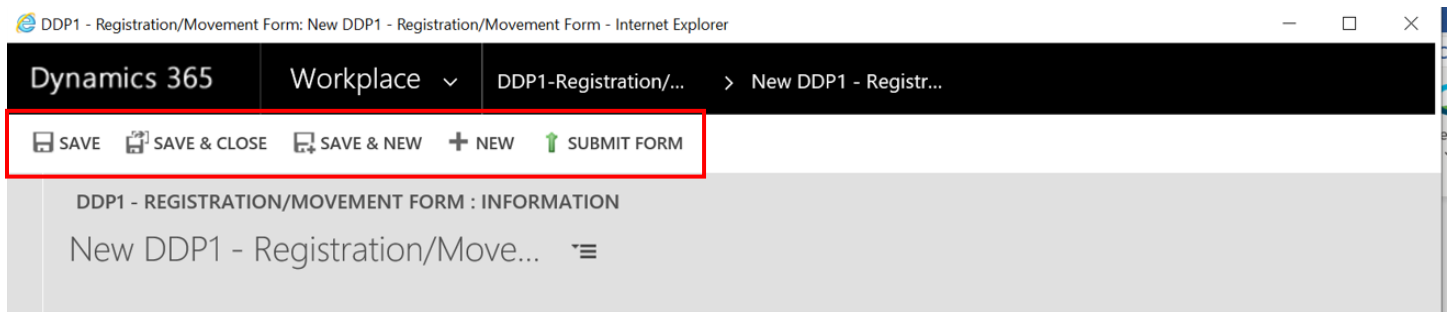
Fields like the **Remove/Add Date** have calendar features, where you can click the calendar to add the date.



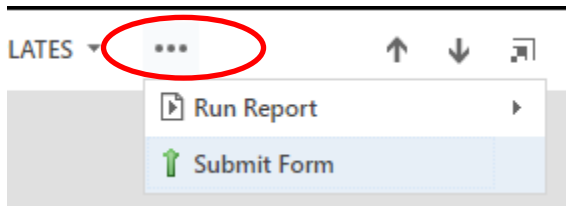
Click the Month and Year to change to a different year and use the scroll bars to move through months. Once you find the date, click on the day to select it.



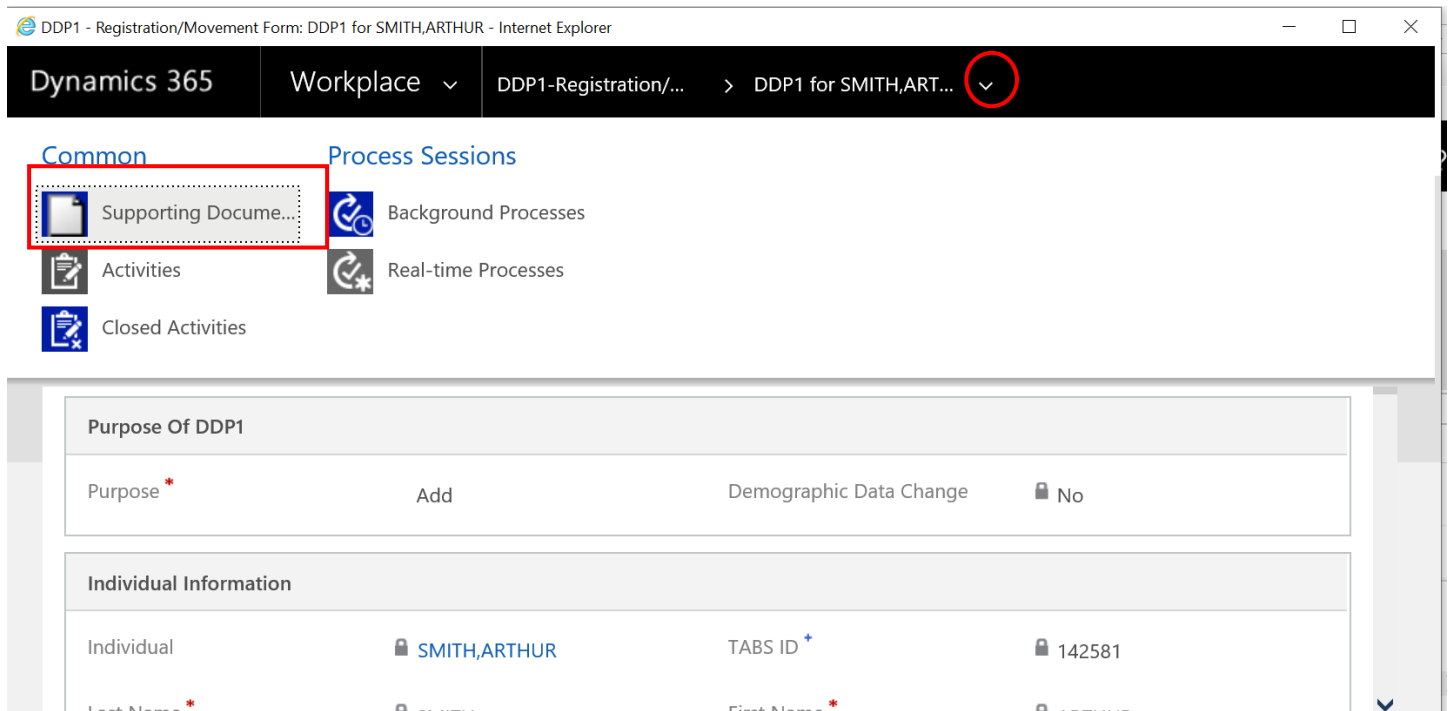
To save and submit a form, use the ribbon at the top of the field.



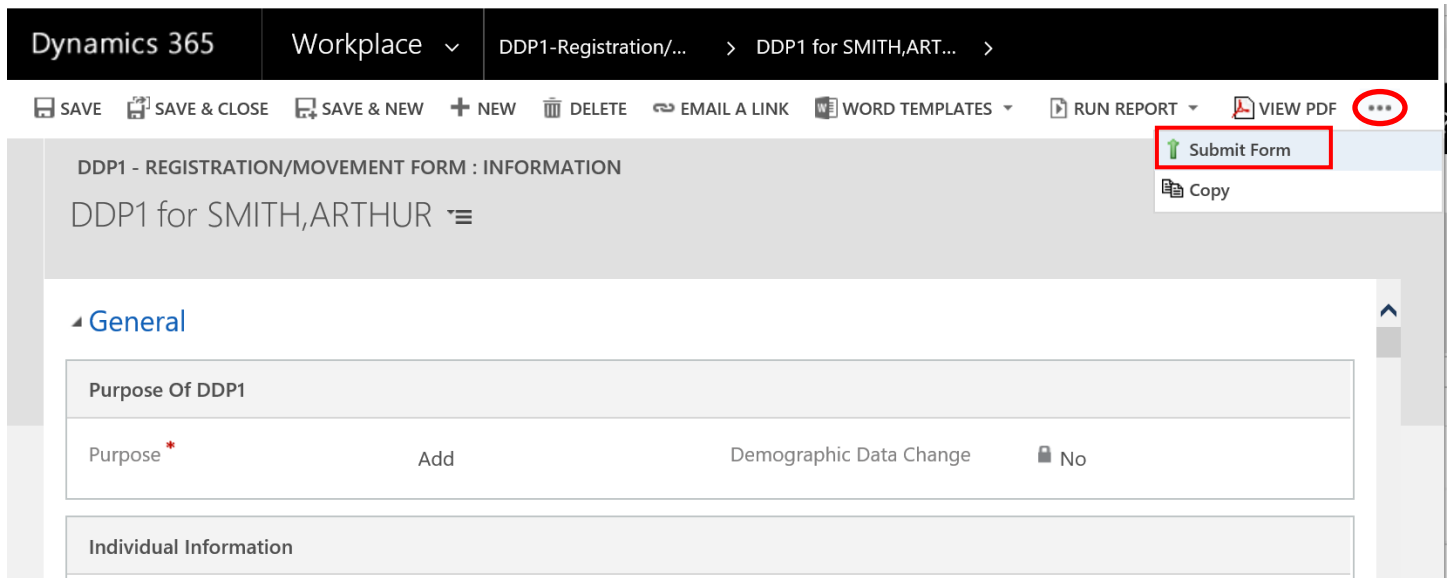
On some forms, more buttons are available after the ellipsis.



Once you Save a form, additional forms and screens may become available, such as Supporting Documents. Click the down arrow to view these.







After you save a form, you can submit it by clicking Submit Form.



If necessary, OPWDD users will review the form and approve, deny or return the form.

Note once a form is submitted, users should scroll to the bottom of the form to review the TABS Messages. TABS Messages are success and/or error messages sent by TABS when it processes forms. Please note the date and time of these messages. It is possible to see an error message for a form that was later resubmitted successfully.

Other Icons available on forms:

-  **View PDF** The **View PDF** button allows you to create a PDF version of a form for viewing and printing.
-  **Copy** The **Copy** button allows you to create an editable copy of an existing form and then save it as a new completed form. This allows for information not to have to be re-typed.
-  **DELETE** The Delete button allows you to delete a saved form. Once a form has been submitted or processed, it cannot be deleted.
-  **EMAIL A LINK** The Email A Link button allows you to share the form with other CHOICES users.

System Views for Forms

The list of forms that are available on each screen can be changed. To change the View click the arrow next to the Active View and choose the other displayed views.

For example you can change the view on the DDP1 screen to [Active DDP1](#), [Inactive DDP1s](#), [Returned DDP1s that you submitted](#), or create personal views.

The screenshot shows the Oracle Fusion Middleware Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Workplace', and 'DDP1-Registration/...'. Below the navigation bar are action buttons: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', and 'EXPORT TO EXCEL'. The main content area shows a dropdown menu for 'Active DDP1' with a red circle around the arrow. The dropdown menu lists 'System Views' and includes options: 'Active DDP1', 'Inactive DDP1', 'Returned DDP1s submitted by me', 'Create Personal View', 'Save Filters as New View', and 'Save Filters to Current View'. Below the dropdown is a table with columns: 'Created By', 'Agency Nam...', 'Add TABS Pr...', 'Remove TAB...', 'Approved Eff...', 'Form Status', and 'Purpose'. The table contains several rows of data.

Created By	Agency Nam...	Add TABS Pr...	Remove TAB...	Approved Eff...	Form Status	Purpose
train155 train...	PRIME CARE...				Submitted	Demograp
train214 train...	0233 - BROO...	02330022 --...			Saved	Add
train151 train...	PRIME CARE...	66030823 --...			Submitted	Add
train155 train...	PRIME CARE...				Submitted	Demograp
train155 train...	PRIME CARE...				Submitted	Democrat

Active will display only those forms with an Active Status. This means that the form is only Saved or Submitted and has not been finalized.

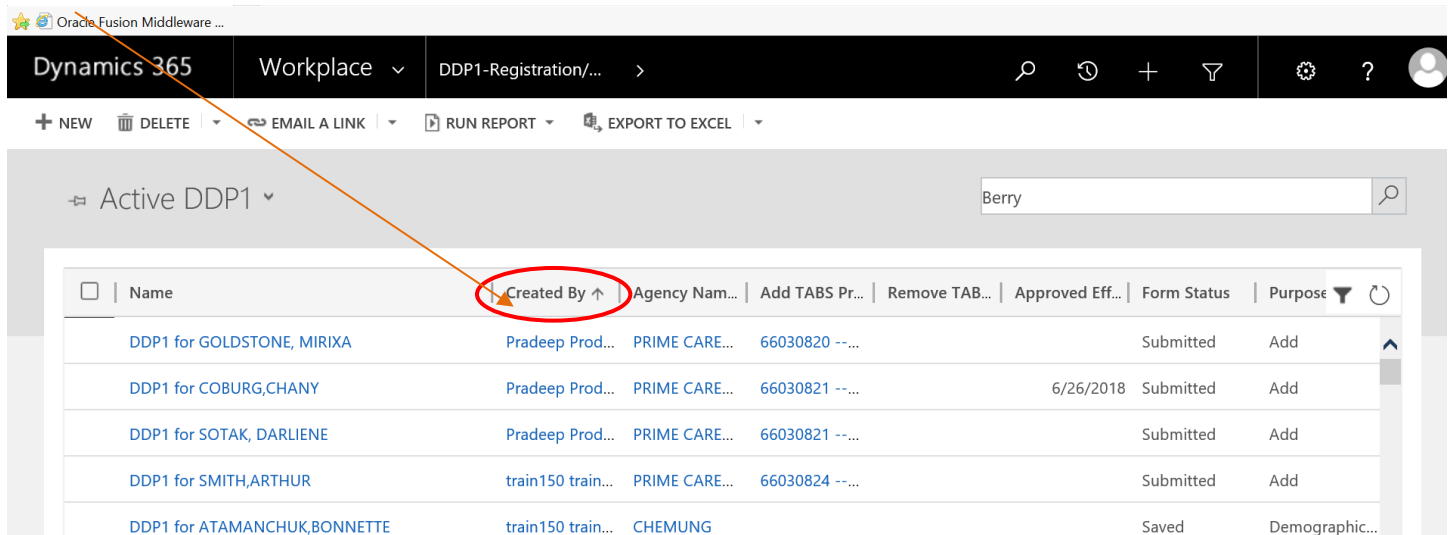
Inactive will display only those forms with an Inactive Status, such as those that were returned, processed, approved, or denied.

Filtering and Sorting Forms

To sort a list of forms, such as DDP1s, you may have been working on.


A list of forms has various column headings that allows the user to sort or filter the information by that field. Click on the column heading to sort by that field. Clicking two times on the column will reverse the sort order.

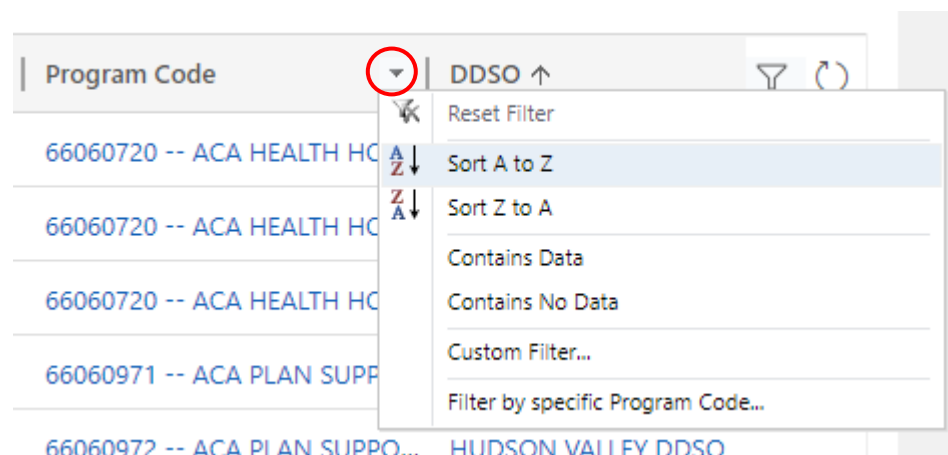
In this example, all the DDP1s are now sorted alphabetically by the user who created the forms.



The screenshot shows the Oracle Fusion Middleware Dynamics 365 interface. The top navigation bar includes "Dynamics 365", "Workplace", and "DDP1-Registration/...". Below the navigation bar, there are action buttons: "+ NEW", "DELETE", "EMAIL A LINK", "RUN REPORT", and "EXPORT TO EXCEL". The main content area displays a table titled "Active DDP1" with a search bar containing "Berry". The table has columns: Name, Created By, Agency Name, Add TABS Pr..., Remove TAB..., Approved Eff..., Form Status, and Purpose. The "Created By" column is circled in red, and a red arrow points from the text above to it. The table contains five rows of data, all sorted alphabetically by the "Created By" field.

Name	Created By	Agency Name	Add TABS Pr...	Remove TAB...	Approved Eff...	Form Status	Purpose
DDP1 for GOLDSTONE, MIRIXA	Pradeep Prod...	PRIME CARE...	66030820 --...			Submitted	Add
DDP1 for COBURG, CHANY	Pradeep Prod...	PRIME CARE...	66030821 --...		6/26/2018	Submitted	Add
DDP1 for SOTAK, DARLIENE	Pradeep Prod...	PRIME CARE...	66030821 --...			Submitted	Add
DDP1 for SMITH, ARTHUR	train150 train...	PRIME CARE...	66030824 --...			Submitted	Add
DDP1 for ATAMANCHUK, BONNETTE	train150 train...	CHEMUNG				Saved	Demographic...

To filter by one of the field headings. Click the funnel to the left of the columns: . Arrows will appear after each heading. Clicking on the arrow will provide a drop down menu with options to filter the data.



The screenshot shows a close-up of the "Program Code" column header in the table. A red circle highlights the funnel icon to the left of the column heading. A dropdown menu is open, showing options for filtering the data. The options are: "Reset Filter", "Sort A to Z", "Sort Z to A", "Contains Data", "Contains No Data", "Custom Filter...", and "Filter by specific Program Code...". The "Sort A to Z" option is highlighted in blue.

Program Code	DDSO
66060720 -- ACA HEALTH HC	HUDSON VALLEY DDSO
66060720 -- ACA HEALTH HC	
66060720 -- ACA HEALTH HC	
66060971 -- ACA PLAN SUPP	
66060972 -- ACA PI AN SUPPO...	

Returned Forms

Go to the Inactive section of a Forms list.

Returned forms are always assigned a status of Inactive.

The DDP1 Section, has a unique Returned DDP1s submitted by me (the user signed in) view.

The screenshot shows the Dynamics 365 interface for 'Inactive DDP1'. A dropdown menu is open, showing 'System Views' with the following options: Active DDP1, Inactive DDP1, Returned DDP1s submitted by me (highlighted with a red box), Create Personal View, Save Filters as New View, Save Filters to Current View, DDP1 for smith, john, and DDP1 for BEDFORD, RONELLE. The table below shows records with columns: TABS ID, Created By, Agency Nam..., Add TABS Pr..., Remove TAB..., Approved Eff..., and Form St.

TABS ID	Created By	Agency Nam...	Add TABS Pr...	Remove TAB...	Approved Eff...	Form St
17949	train154 train...	HERITAGE FA...	77190901 --...		3/1/2012	Returned
114273	train155 train...	HERITAGE FA...	77190912 --...		1/19/2012	Returned
363220	train154 train...	HERITAGE FA...	77190901 --...		12/13/2011	Returned
	train180 train...	HERITAGE FA...	77190912 --...		8/20/2012	Returned
325225	train154 train...	HERITAGE FA...	77190941 --...		12/1/2011	Returned

If a form is returned and needs to be resubmitted, it must be copied and the new form submitted. You cannot resubmit the original returned form, copy it, fix the mistakes or provide the requested information and then resubmit.

The screenshot shows the Dynamics 365 interface for 'DDP1 - REGISTRATION/MOVEMENT FORM : INFORMATION'. The form title is 'DDP1 for ABITTAN,HALI'. A warning message is displayed: 'This form was returned. Check 'Notes' for the returner's comments. Use the 'Copy' feature in the toolbar to resubmit the information on this form.' The form fields include 'Purpose Of DDP1' and 'Individual Information'.

Sign Out

To Sign out of CHOICES, click the icon that looks like a person at the top of the page,

The option to Sign Out will display. Click **Sign Out**.

