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@odhsoha.oregon.gov or fax to 503-947-5044.

*Indicate Action: ☐ **Add User** ☐ **Modify User** ☐ **Deactivate User** ☐ **Change of Info**	
*User's Name: (Last, First MI) *please print*	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
■	☐	**Local Auth IGA Manager** – *requires completion/submission of separate Local Auth IGA Manager enrollment form to add user role.*
☐	☐	**Local Auth IGA Coordinator** – *able to view contract funding related information, such as PAL, SEPA etc., and run various reports.*
☐	☐	**Local Auth PPA Coordinator** - *able to view service funding related information, such as SEPA, BA Lines, etc., and run various reports.*

Local Authority CPA Services Roles

ADD	DEL	User Role/Description
☐	☐	**Local Auth CPA Manager** - *able to Create/Delete/Submit/Update/Void client service CPAs, view related client and service information, run service and payment report.*
☐	☐	**Local Auth CPA Preparer** - *able to Create/Delete/Update, but not Submit/Void client service CPAs, view related client and service information, run service and payment report.*

ADD	DEL	User Role/Description
☐	☐	**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.*
☐	☐	**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
☐	☐	**Local Auth POC Super User[1]** - *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.* **[1]**<u>Successful completion of POC Super User training required prior to role assignment.</u> *Please submit certificate of training completion with this UEF. Enrollment of users with this role is limited to 3 staff per CDDP.*
☐	☐	**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.*
☐	☐	**Local Auth POC Preparer** - *able to <u>Create/Save/Update/Delete</u> draft Plans of Care, Plan Lines and Service Prior Auths (SPAs) only; <u>not able to submit or make edits once the PL/SPA is out of draft status</u>; view POC Service Delivered (SD) billing & associated claims information; view client, provider & ER information; run various POC related reports.*
☐	☐	**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.*
☐	☐	**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.*
☐	☐	**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.*
☐	☐	**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.*
☐	☐	**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.*
☐	☐	**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
☐	☐	**SIS Local Auth Viewer** - *able to view Client SIS Assessment*
☐	☐	**Local Auth eXPRS View Only** - *able to <u>view only</u> client, CM and CPA services information; view provider information.*
☐	☐	**Local Auth eXPRS Report Access Only** - *able to run various eXPRS reports.*
☐	☐	**Local Auth Service Coordinator Viewer** - *able to <u>view only</u> CM SE48 information; view RFFS Claims; run RFFS reports.*
☐	☐	**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
☐	☐	**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>*.*
☐	☐	**CM CPA Manager[2]** - *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.* [2]*The same user should not have this role & <u>CM Encounter Manager</u> role assigned at the same time.*
☐	☐	**CM CPA Preparer** - *able to <u>Create/Delete/Edit, but not Submit</u> Draft SE48 CM service CPAs or <u>Edit/Void</u> Approved SE48 CM service CPAs; view related client and CM service information; run CM service and CM/RFFS payment reports.*
☐	☐	**CM Encounter Manager[3]** - *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.* [3]*The same user should not have this role & <u>CM CPA Manager</u> role assigned at the same time.*
☐	☐	**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
☐	☐	**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.*
☐	☐	**CDDP Eligibility Enrollment Preparer** - *able to <u>Create/Delete/Submit/ Update/Withdraw, but not Submit</u> DD Eligibility Enrollment (0337) form; view client information; run DD Eligibility Due Dates report.*

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

Oregon Needs Assessment (ONA) Roles

ADD	DEL	User Role/Description
☐	☐	**CM ONA SC[6] -** *able to <u>Copy/Create/Delete/Update/Submit</u> Oregon Needs Assessment; view client, POC, SPA, provider information.* **[6]This role cannot be assigned until the user completes/sends in their three required ONA training certificates along with completed User Enrollment Form. A user cannot be assigned this role and the CM ONA Assessor role at the same time.**
☐	☐	**CM ONA Assessor[7] -** *able to <u>Copy/Create/Delete/Update/Submit</u> Oregon Needs Assessment; view client, POC, SPA, provider information.* **[7]This role cannot be assigned until the user completes required in-person training with ODDS. A user cannot be assigned this role and the CM ONA SC role at the same time.**
☐	☐	**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:** / /	

Maintain form in local file for audit purposes.