

How to Enter Presumptive Eligibility

eXPRS allows CDDPs to directly enter DD eligibility information for an individual by using the **DD Eligibility Add** page¹. This guide contains two sections:

- 1) How to create a draft Eligibility Determination
- 2) How to enter Presumptive Eligibility

To do the work in the guide, the user must have one of the following roles:

- **CDDP Eligibility Specialist**
- **CDDP Eligibility Specialist Processor**

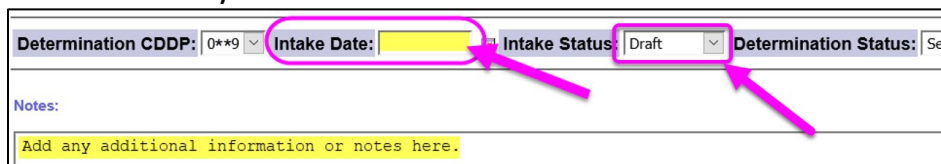
How to Create a Draft Eligibility Determination:

- 1) Login and search for the individual's record using the **View Client** page². Then select the **DD Eligibility** section > **Add** Button to enter a new eligibility Line.



▸ Aliases
 ▾ **DD Eligibility**
Initial Eligibility Date:
 Nothing found to display.
 Add

- 2) Enter the following information and select **Save** to create a **Draft** record:
 - **Intake Date:** Enter the date the initial intake was completed.
 - **Intake Status:** Set as **Draft** (until eligibility determination is completed).
 - **Notes:** Add any notes or information desired.



Determination CDDP: 0**9 ▾ Intake Date: Intake Status: Draft ▾ Determination Status: Sel

Notes:

Add any additional information or notes here.

¹ For more information, see the guide: **Overview of the DD Eligibility Add Page**

² For steps, see the guide and video: **How to use the View Client Page in eXPRS**

3) After the save, you will be returned to the **View Client** page and the initial eligibility line will display.

Initial Eligibility Date:

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	Primary Qualifying Diagnosis	
0**9	6/27/2018	Draft						<input type="button" value="Edit"/> <input type="button" value="View Details"/>

4) After the eligibility determination work is complete, return to the individual's record and select **Edit** on the eligibility line to open it and add the eligibility determination information.

Initial Eligibility Date:

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	Primary Qualifying Diagnosis	
0**9	6/27/2018	Draft						<input type="button" value="Edit"/> <input type="button" value="View Details"/>

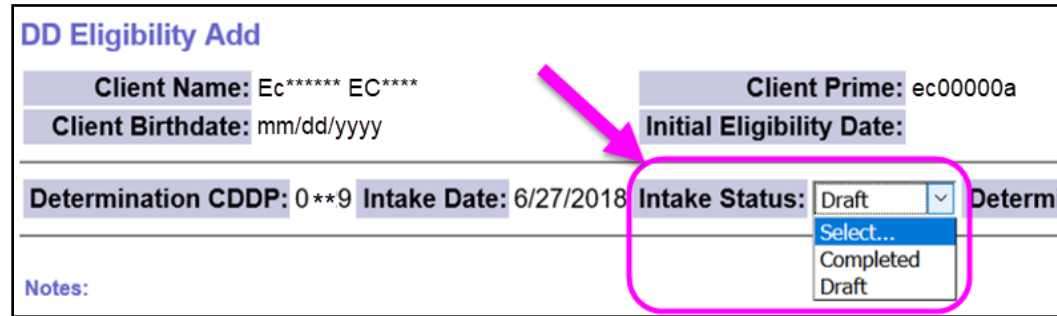
Select one of the following headings to go to the steps for that specific process:

- [How to Enter Presumptive Eligibility for an Intellectual Disability](#)
- [How to Enter Presumptive Eligibility for a Developmental Disability](#)

How to Enter Presumptive Eligibility for an Intellectual Disability:

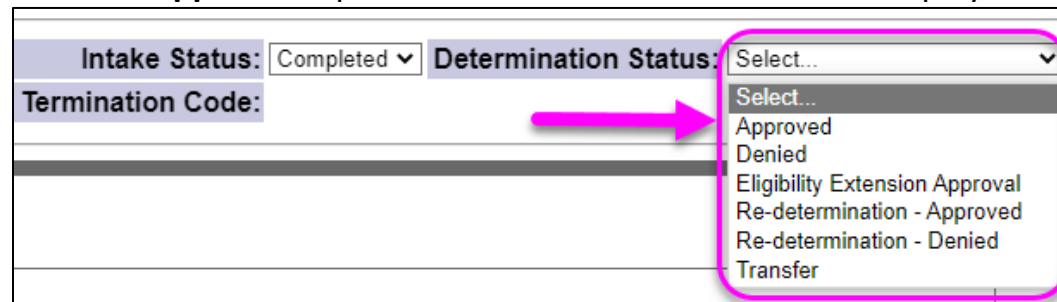
As a reminder, any person with a Full Scale IQ (FSIQ) greater than 65 is not a candidate for Presumptive Eligibility under ID.

1) On the **DD Eligibility Add** page, set the **Intake Status** to **Completed**. This will cause more fields to appear.



The screenshot shows the 'DD Eligibility Add' form. Fields include Client Name (Ec***** EC****), Client Birthdate (mm/dd/yyyy), Client Prime (ec00000a), and Initial Eligibility Date. The Intake Status dropdown is open, showing options: Draft, Select..., Completed, and Draft. A pink arrow points to the dropdown, and a pink box highlights the 'Completed' option.

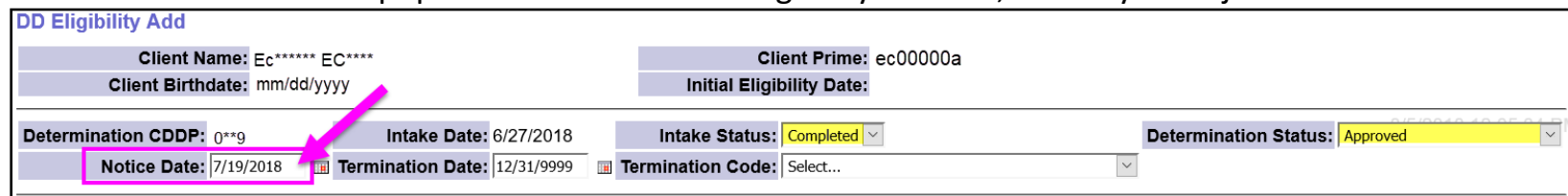
2) Select the **Determination Status > Approved** Option. This will cause more fields to display.



The screenshot shows the 'DD Eligibility Add' form with Intake Status set to 'Completed'. The Determination Status dropdown is open, showing options: Select..., Select..., Approved, Denied, Eligibility Extension Approval, Re-determination - Approved, Re-determination - Denied, and Transfer. A pink arrow points to the dropdown, and a pink box highlights the 'Approved' option.

3) Enter the following information into the appropriate field.

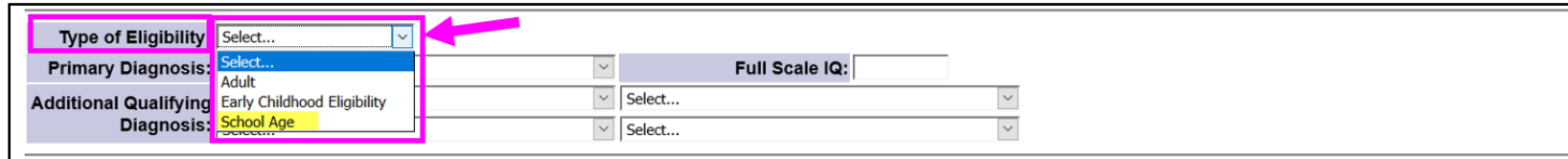
- **Notice Date:** The date the Eligibility Determination notice was sent to the individual and/or their guardian informing them of the eligibility determination decision.
- **Termination Date:** Auto-populates as 12/31/9999 if the eligibility is active, but may adjust based on other selections.
- **Termination Code:** Auto-populates as blank if the eligibility is active, but may be adjusted based on other selections.



The screenshot shows the 'DD Eligibility Add' form with all fields populated. Client Name is Ec***** EC****, Client Birthdate is mm/dd/yyyy, Client Prime is ec00000a, and Initial Eligibility Date is blank. Determination CDDP is 0**9, Intake Date is 6/27/2018, Intake Status is Completed, and Determination Status is Approved. Notice Date is 7/19/2018, Termination Date is 12/31/9999, and Termination Code is Select... A pink arrow points to the Notice Date field.

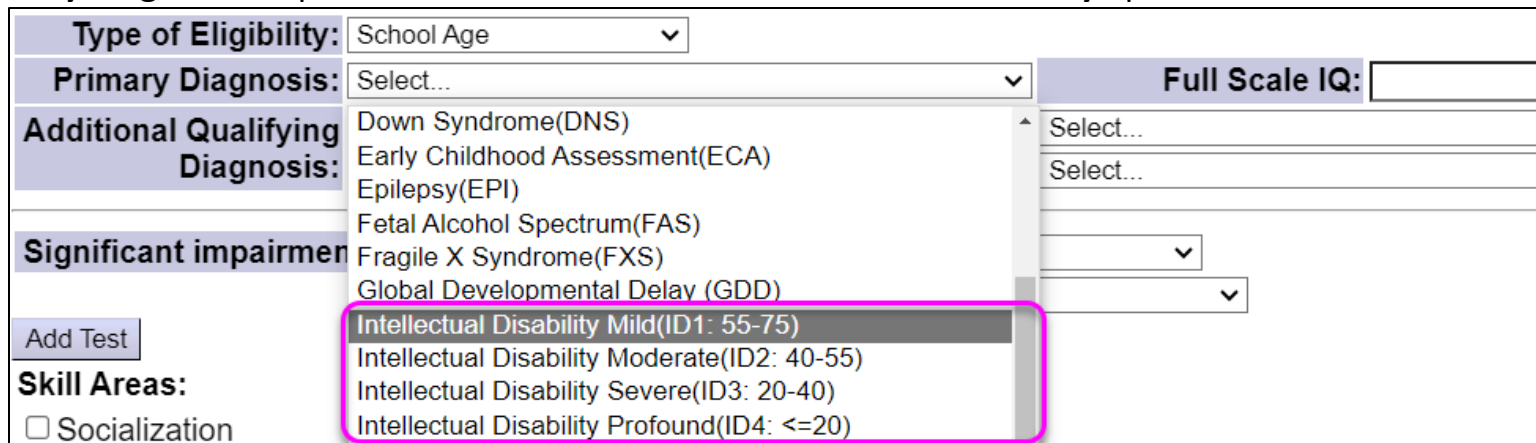
TIP: Before the Termination Date and Code can be changed to reflect the Presumptive Eligibility, a completed Eligibility Line must be saved. After the save, these fields can then be edited, and steps 9-11 of this process show how this is done.

4) Select the **Type of Eligibility** dropdown and choose either **Adult** or **School Age**. This will adjust what fields show onscreen.



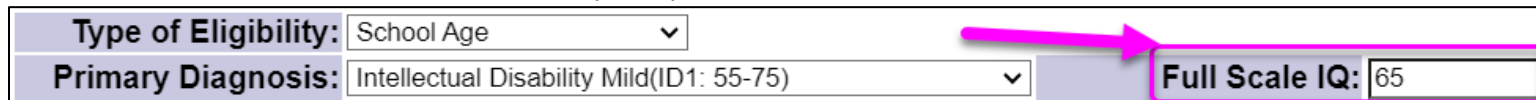
A screenshot of a form's 'Type of Eligibility' dropdown menu. The dropdown is open, showing options: 'Adult', 'Early Childhood Eligibility', and 'School Age'. The 'School Age' option is highlighted in yellow. A pink arrow points to the dropdown arrow. The form also shows 'Primary Diagnosis' and 'Additional Qualifying Diagnosis' dropdowns, and a 'Full Scale IQ' input field.

5) Select **Primary Diagnosis** dropdown and choose the correct **Intellectual Disability** option for the individual.



A screenshot of the 'Primary Diagnosis' dropdown menu. The dropdown is open, showing a list of conditions: 'Down Syndrome(DNS)', 'Early Childhood Assessment(ECA)', 'Epilepsy(EPI)', 'Fetal Alcohol Spectrum(FAS)', 'Fragile X Syndrome(FXS)', 'Global Developmental Delay (GDD)', 'Intellectual Disability Mild(ID1: 55-75)', 'Intellectual Disability Moderate(ID2: 40-55)', 'Intellectual Disability Severe(ID3: 20-40)', and 'Intellectual Disability Profound(ID4: <=20)'. The 'Intellectual Disability Mild(ID1: 55-75)' option is highlighted in grey. A pink box highlights this option. The form also shows 'Type of Eligibility' set to 'School Age', 'Additional Qualifying Diagnosis' dropdowns, and a 'Full Scale IQ' input field.

6) Enter in the individual's last known Full Scale IQ (FSIQ).



A screenshot of the 'Full Scale IQ' input field. The field contains the number '65'. A pink arrow points to the input field. The form also shows 'Type of Eligibility' set to 'School Age' and 'Primary Diagnosis' set to 'Intellectual Disability Mild(ID1: 55-75)'. A pink box highlights the 'Full Scale IQ' field.

TIP: If an individual's **Primary Diagnosis** is an Intellectual Disability and it is determined that their IQ is too low to test, enter it as **Intellectual Disability Profound (ID4: <20)** and enter 20 into the **FSIQ** field.

7) In the **Significant Impairment...** section, select **Assessment Not Required – IQ 65 or less** and **NA** from the 2 dropdown menus.

Type of Eligibility:	School Age	
Primary Diagnosis:	Intellectual Disability Mild(ID1: 55-75)	Full Scale IQ: 65
Additional Qualifying Diagnosis:	Select...	Select...
	Select...	Select...
Significant impairment in adaptive behavior:	Assessment not required - IQ 65 or less	NA

TIP: If the individual is unable to test, an Adaptive Assessment is required. Follow steps #6-13 under the heading **How to Enter Presumptive Eligibility for a Developmental Disability** to complete the eligibility line.

8) Enter the following information and **Save**:

- Add the phrase “PRESUMPTIVE ELIGIBILITY” into the **Notes** field, along with any other notes needed.
- The **Eligibility Specialist** field prefills with the name of the current Eligibility Specialist accessing the page. Select a different specialist as needed.
- Upload & attach a document.

Notes:
PRESUMPTIVE ELIGIBILITY. Any other notes can also be added here.
Eligibility Specialist: EligibilitySpecialist ONE <input checked="" type="checkbox"/> Active Only
Attach Type: <input checked="" type="radio"/> Eligibility Notice <input type="radio"/> Other
Attach File: Choose File Sample Eligibility Notice.pdf File size must not exceed 4 MB
Save Reset Cancel

TIP: After saving, you will be returned to the **View Client** page. To attach more than one document to the Eligibility line, select the **Edit** Button, scroll down to the bottom of the page, and upload another document as needed.

9) You will be returned to the individual's **View Client** page. The **Intake Status** will show as **Completed** and the **Determination Status** will show as **Approved**. Now, select the **Edit** button.

▼ **DD Eligibility**
Initial Eligibility Date: 7/2/2023

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	
3029	7/1/2023	Completed	Approved	7/2/2023	12/31/9999		<input type="button" value="Edit"/> <input type="button" value="View Details"/>

10) Update the following information into the appropriate field, and then select **Save**.

- **Termination Date:** Set to the day before 12 months from the **Notice Date**. For example, if the Notice Date is 7/2/2023, then enter 7/1/2024.
- **Termination Code:** Select **Re-Determine Eligibility – not because of age**.

Determination CDDP: 3029	Intake Date: 7/1/2023	Intake Status: Completed	Determination Status: Approved
Notice Date: 7/2/2023	Termination Date: 7/1/2024	Termination Code: Re-determine Eligibility - not because of age	

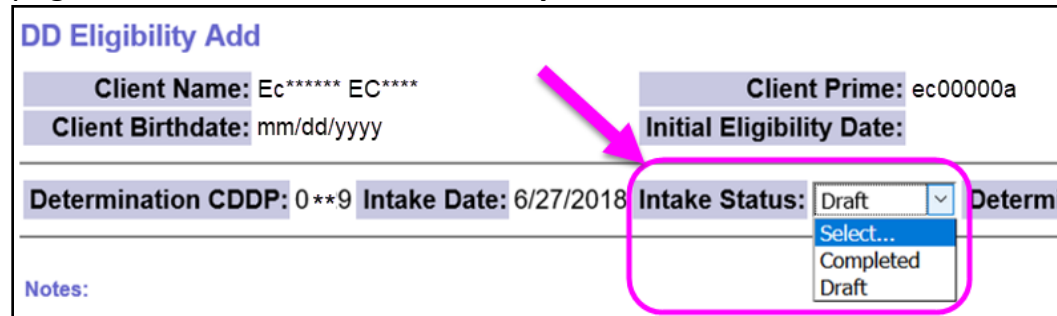
11) You will be returned to the individual's **View Client** page. The updated **Termination Date** and **Code** will display.

▼ **DD Eligibility**
Initial Eligibility Date: 7/2/2023

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	
3029	7/1/2023	Completed	Approved	7/2/2023	7/1/2024	RED	<input type="button" value="Edit"/> <input type="button" value="View Details"/>

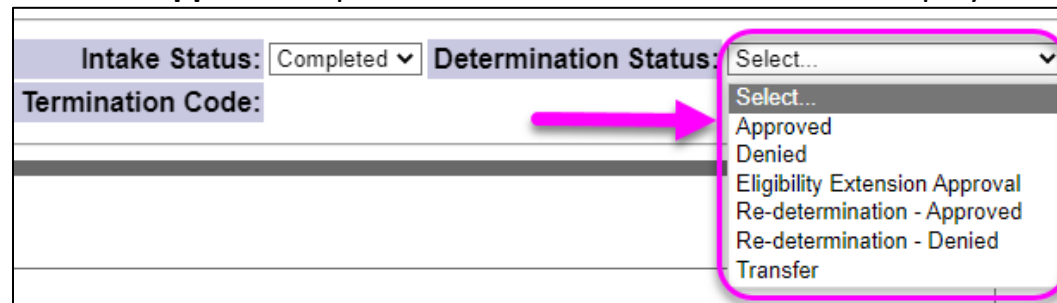
How to Enter Presumptive Eligibility for a Developmental Disability:

1) On the **DD Eligibility Add** page, set the **Intake Status** to **Completed**. This will cause more fields to appear.



The screenshot shows the 'DD Eligibility Add' form. Fields include Client Name (Ec***** EC****), Client Prime (ec00000a), Client Birthdate (mm/dd/yyyy), Intake Date (6/27/2018), and Intake Status (Draft). A pink arrow points to the Intake Status dropdown menu, which is open and shows options: Draft, Select..., Completed, and Draft. The 'Completed' option is highlighted.

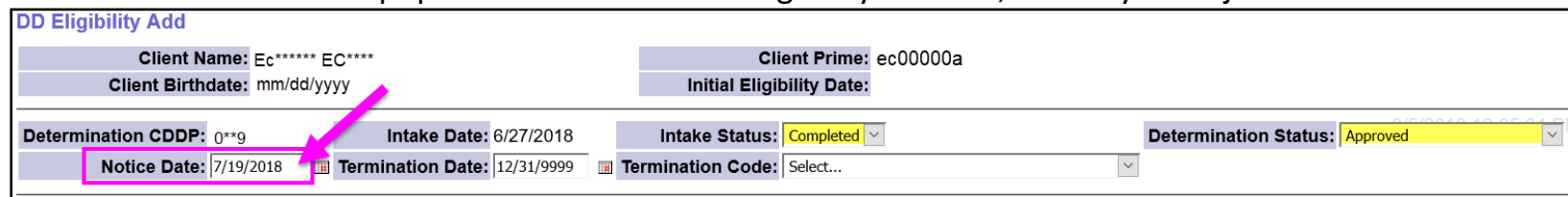
2) Select the **Determination Status > Approved** Option. This will cause more fields to display.



The screenshot shows the 'DD Eligibility Add' form with Intake Status set to 'Completed'. The Determination Status dropdown menu is open, showing options: Select..., Select..., Approved, Denied, Eligibility Extension Approval, Re-determination - Approved, Re-determination - Denied, and Transfer. A pink arrow points to the 'Approved' option.

3) Enter the following information:

- **Notice Date:** The date the Eligibility Determination notice was sent to the individual and/or their guardian informing them of the eligibility determination decision.
- **Termination Date:** Auto-populates as 12/31/9999 if the eligibility is active, but may adjust based on other selections.
- **Termination Code:** Auto-populates as blank if the eligibility is active, but may be adjusted based on other selections.



The screenshot shows the 'DD Eligibility Add' form with all fields filled out. Fields include Client Name (Ec***** EC****), Client Prime (ec00000a), Client Birthdate (mm/dd/yyyy), Intake Date (6/27/2018), Intake Status (Completed), Determination Status (Approved), Notice Date (7/19/2018), Termination Date (12/31/9999), and Termination Code (Select...). A pink arrow points to the Notice Date field.

TIP: Before the Termination Date and Code can be changed to reflect the Presumptive Eligibility, a completed Eligibility Line must be saved. After the save, these fields can then be edited, and steps 13-15 of this process show how this is done.

4) Select the **Type of Eligibility** dropdown and choose either **Adult** or **School Age**. This will adjust what fields show onscreen.

A screenshot of a web form showing a dropdown menu for 'Type of Eligibility'. The menu is open, displaying options: 'Select...', 'Adult', 'Early Childhood Eligibility', and 'School Age'. A pink arrow points to the dropdown arrow, and another pink arrow points to the 'School Age' option. Other form fields like 'Primary Diagnosis' and 'Full Scale IQ' are partially visible.

5) Select **Primary Diagnosis** dropdown and choose the correct **Developmental Disability** option for the individual³. In this example, **Autism Spectrum (AUT)** has been selected.

A screenshot of a web form showing a dropdown menu for 'Primary Diagnosis'. The menu is open, displaying options: 'Select...', 'Acquired Brain Injury(ABI)', 'Angelman Syndrome(ANG)', 'Autism Spectrum(AUT)', 'Children's Intensive In-Home Supports for Non-DD(CII)', 'Cerebral Palsy(CPY)', 'Down Syndrome(DNS)', and 'Early Childhood Assessment(ECA)'. A pink arrow points to the 'Autism Spectrum(AUT)' option. Other form fields like 'Determination CDDP', 'Intake Date', 'Notice Date', and 'Termination Date' are visible.

6) In the **Significant Impairment...** dropdown, select **Assessment Completed & Composite Score of 70 or below**

A screenshot of a web form showing a dropdown menu for 'Significant impairment in adaptive behavior'. The menu is open, displaying options: 'Assessment completed' and 'Composite score of 70 or below'. A pink arrow points to the 'Composite score of 70 or below' option. An 'Add Test' button is visible below the dropdown.

7) Select **Add Test**, then enter the date of the last adaptive/informal assessment, or Physician's Statement of Areas Impaired.

A screenshot of a web form showing a date input field for 'Test Date'. The date '6/15/2023' is entered. A pink box highlights the date field. Other form fields like 'Significant impairment in adaptive behavior' and 'Test Name' are visible.

³ Remember, selecting **Other Genetic Condition** or **Other Health Impairment** requires ODDS approval and additional information to be entered.

8) Select the Applicable **Test Name**, or select **Other** if an informal assessment or Physician’s Statement is being used.

Significant impairment in adaptive behavior: Assessment completed
Composite score of 70 or below
Test Date: 6/15/2023
Test Name: Other

9) Select any checkboxes in the **Skill Areas** or **Domain Areas** section as needed

Skill Areas:
 Socialization
 Self-Care
 Health and safety
 Work
 Community Use
 Self-direction
 Mobility
 Home/school living
 Communication
 Functional academics
 Leisure

Domain Areas:
 Communication
 Conceptual
 Daily Living Skills
 Motor Skills
 Practical
 Socialization
 Social

10) Enter the following information and **Save**:

- Add the phrase “PRESUMPTIVE ELIGIBILITY” into the **Notes** field, along with any other notes needed.
- The **Eligibility Specialist** field prefills with the name of the current Eligibility Specialist accessing the page. Select a different specialist as needed.
- Upload & attach a document.

Notes:
PRESUMPTIVE ELIGIBILITY. Any other notes can also be added here.

Eligibility Specialist: EligibilitySpecialist ONE Active Only

Attach Type: Eligibility Notice Other

Attach File: Choose File Sample Eligibility Notice.pdf File size must not exceed 4 MB

Save Reset Cancel

TIP: After saving, you will be returned to the **View Client** page. To attach more than one document to the Eligibility Line, select the **Edit** Button, scroll down to the bottom of the page, and upload another document as needed.

11) You will be returned to the individual's **View Client** page. The **Intake Status** will show as **Completed** and the **Determination Status** will show as **Approved**. Now, select the **Edit** button.

▼ **DD Eligibility**
Initial Eligibility Date: 7/2/2023

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	
3029	7/1/2023	Completed	Approved	7/2/2023	12/31/9999		<input type="button" value="Edit"/> <input type="button" value="View Details"/>

12) Update the following information into the appropriate field, and then select **Save**.

- **Termination Date:** Set to the day before 12 months from the **Notice Date**. For example, if the Notice Date is 7/2/2023, then enter 7/1/2024.
- **Termination Code:** Select **Re-Determine Eligibility – not because of age**.

Determination CDDP: 3029	Intake Date: 7/1/2023	Intake Status: Completed	Determination Status: Approved
Notice Date: 7/2/2023	Termination Date: 7/1/2024	Termination Code: Re-determine Eligibility - not because of age	

13) You will be returned to the individual's **View Client** page. The updated **Termination Date** and **Code** will display.

▼ **DD Eligibility**
Initial Eligibility Date: 7/2/2023

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	
3029	7/1/2023	Completed	Approved	7/2/2023	7/1/2024	RED	<input type="button" value="Edit"/> <input type="button" value="View Details"/>