

eXPRS Activity / User Role Matrix for CDDPs

Who do they work for?	What work will they be doing?	The User Enrollment Form needed:	The user role(s) needed: (need at least one):	Organization Assignment Level
<p><i>Below are the minimum set of roles that a CDDP MUST HAVE to conduct business in eXPRS: Except where role exclusions are noted, one person can have multiple roles.</i></p>				
CDDP	MANAGE OVERALL SECURITY and user access for my organization.	Security Auth Form + Current Board Order	<ul style="list-style-type: none"> Local Auth Direct Contract Chief Security Officer 	<i>NOTE: this role can only be assigned by DHS.</i>
CDDP	Accept a SEPA (accept money/funding limits from the State).	IGA Manager Form + Current Board Order	<ul style="list-style-type: none"> Local Authority IGA Manager 	<i>NOTE: this role can only be assigned by DHS.</i>
CDDP	Create, update, submit a PLAN OF CARE (POC) .	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth POC Manager 	Assign to county organization
CDDP	To make Retro-active UPDATES to PLAN LINES and/or SPAs in a POC, and VOID SD billing entries.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth POC Super User <i>NOTE: ODDS Operations direction is a limit of 3 staff per CME with this role; additional training required.</i> 	Assign to county organization
CDDP	Review and approve/reject PENDING POC SERVICE DELIVERED (SD) Entries submitted by PSW providers.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth POC Claim Reviewer 	Assign to county organization
CDDP	Add provider records to my CDDP's POC PROVIDER PANEL , including viewing provider records.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth Provider Panel Manager 	Assign to county organization

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CDDP	Create & submit POC SERVICE DELIVERED (SD) Entries on behalf of, or for “generic,” providers for payment.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth POC Claims Manager 	Assign to county organization
CDDP	Create, save, SUBMIT and/or EDIT a CPA for client COMPREHENSIVE services.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth CPA Manager 	Assign to county organization
CDDP	Create, save, SUBMIT and/or EDIT an SE48 CPA for the CDDP’s Case Management services.	Case Management User Enrollment Form	<ul style="list-style-type: none"> CM CPA Manager <p><i>NOTE: Cannot have this role <u>AND</u> also have CM Encounter Manager role.</i></p>	Assign to County CM provider
CDDP	Create, submit, or void SE48 RFFS CM CLAIMS (aka: CM billable contacts).	Case Management User Enrollment Form	<ul style="list-style-type: none"> CM Encounter Manager <p><i>NOTE: Cannot have this role <u>AND</u> also have CM CPA Manager role.</i></p>	Assign to County CM provider
CDDP	Create & submit DD ELIGIBILITY ENROLLMENT (0337) information , submit TXIX waiver forms and SNAP budget pages using eXPRS.	Case Management User Enrollment Form	<ul style="list-style-type: none"> CDDP Eligibility Enrollment Processor 	Assign to County CM provider
CDDP	Have a Case Manager/Service Coordinator’s name show in the drop-down lists in eXPRS for our CDDP.	Case Management User Enrollment Form	<ul style="list-style-type: none"> CM Service Coordinator <p><i>NOTE: This role is used for eXPRS data only. It does <u>NOT</u> give the person access to eXPRS as a stand alone role. User must have another role assigned to have access to eXPRS.</i></p>	Assign to County CM provider

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<i>Below are additional/optional roles that CDDPs can utilize to do business:</i>				
CDDP	MANAGE USER ACCESS and assign permissions for users/employees in my organization.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth Security Officer 	Assign to county organization
CDDP	UPDATE/UNLOCK USER ACCOUNTS and re-set passwords (cannot assign roles/permissions) for users in my organization.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth User Maintainer 	Assign to county organization
CDDP	VIEW USERS who have access to eXPRS for my organization.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth User Viewer 	Assign to county organization
CDDP	View SEPA (accept money/funding limits from the State) information only.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Authority IGA Coordinator 	Assign to county organization
CDDP	View PPA information for allotment payments.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth PPA Coordinator 	Assign to county organization
CDDP	Create and save (but not submit) DD ELIGIBILITY ENROLLMENT (0337) information using eXPRS.	Case Management User Enrollment Form	<ul style="list-style-type: none"> CDDP Eligibility Enrollment Preparer 	Assign to County CM provider

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CDDP	View DD ELIGIBILITY ENROLLMENT (0337) information ONLY using eXPRS.	Case Management User Enrollment Form	<ul style="list-style-type: none"> • CDDP Eligibility Enrollment Viewer 	Assign to County CM provider
CDDP	View PSW or other PROVIDER records.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> • Local Auth Provider Viewer 	Assign to county organization
CDDP	Create and save a CPA (but <i>not</i> submit it) for client COMPREHENSIVE services. <i>The LA CPA Manager must submit them</i>	Local Authority User Enrollment Form	<ul style="list-style-type: none"> • Local Auth CPA Preparer 	Assign to county organization
CDDP	View CPA information and associated reports only.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> • Local Auth CPA Coordinator 	Assign to county organization
CDDP	View PLANS of CARE (POC) .	Local Authority User Enrollment Form	<ul style="list-style-type: none"> • Local Auth POC Viewer 	Assign to county organization
CDDP	View CLAIMS information for allotment and FFS claims.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> • Local Auth Claims Coordinator 	Assign to county organization
CDDP	Be able to VIEW INFORMATION ONLY in eXPRS for CDDP services that a Service Coordinator may need access to.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> • Local Auth Service Coordinator View Only 	Assign to county organization

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CDDP	Be able to access and pull REPORTS in eXPRS for CDDP services.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth eXPRS Report Access Only 	Assign to county organization
CDDP	Be able to only view most all information in eXPRS for CDDP services.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth eXPRS View Only 	Assign to county organization
CDDP	Access PC20 plan renewal date information only.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Local Auth PC20 Report Viewer 	Assign to county organization
CDDP	Be able to view finalized SIS Assessment records.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> SIS Local Auth Viewer Local Auth CPA Manager Local Auth CPA Coordinator Local Auth Claims Coordinator Local Auth IGA Manager Local Auth IGA Coordinator 	Assign to county organization
		Case Management User Enrollment Form	<ul style="list-style-type: none"> CM CPA Manager CM Encounter Manager 	Assign to County CM provider
CDDP	Be able to receive eXPRS notifications that a SIS Assessment record has been finalized.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> SIS Local Auth Viewer 	Assign to county organization

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Crisis Regional Program	View client and SIS information in eXPRS to assist in coordinating crisis/diversion services.	Local Auth Region	<ul style="list-style-type: none"> Local Auth Region View Only 	Assign to county organization for each CDDP in the Region