How to Create a NEW DD Eligibility Enrollment (DDEE) Form in eXPRS *without a Prime Number*

(updated 10/29/2019)

The DD Eligibility & Enrollment (DDEE) process previously utilized by CME staff has been updated in eXPRS to be more streamlined. With the transition to direct DD Eligibility entry into eXPRS & implementation of the eXPRS module for the Oregon Needs Assessment (ONA) process to generate a Level of Care (LOC), much of the information submitted on a DDEE form is no longer needed. This has enabled the DDEE form & process to be streamlined for easier use in eXPRS for both CDDP and Brokerage staff.

There may be times when individuals new to DD services in Oregon will be determined eligible & the CME will need to report enrollment information, but that individual ***does not yet have a DHS Prime Number assigned***. CME staff can still submit a DDEE (0337) form for those individuals. This guide will show you that process.

For full details on the ODDS policies & procedures for when creation/submission of a DDEE (0337) form is now needed, please see the ***DD Eligibility and Enrollment*** *(DDEE/0337)* ***Worker Guide*** available here:
http://www.dhs.state.or.us/policy/spd/transmit/ar/2019/ar19043.pdf

Users will need to be assigned the below user roles to do this DDEE (0337) form work:

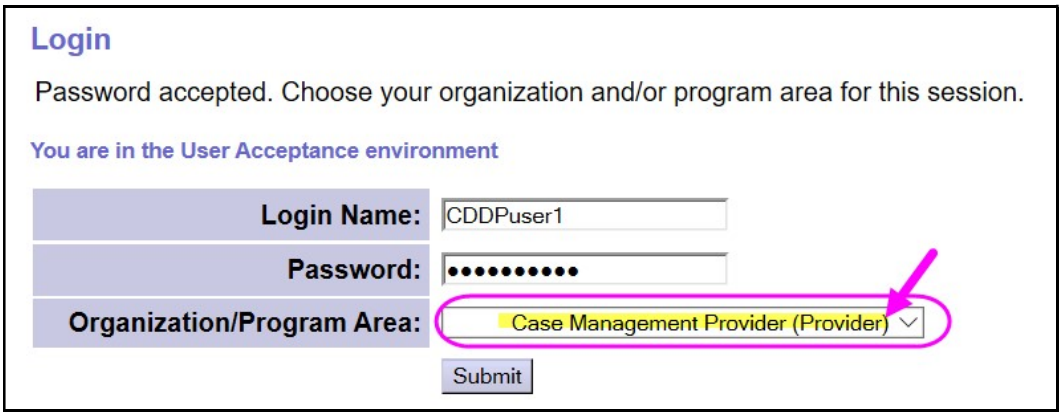
- **CDDPs**:
  - CDDP Eligibility Enrollment Preparer
  - CDDP Eligibility Enrollment Processor

- **Brokerages**:
  - Brokerage Eligibility Enrollment Processor

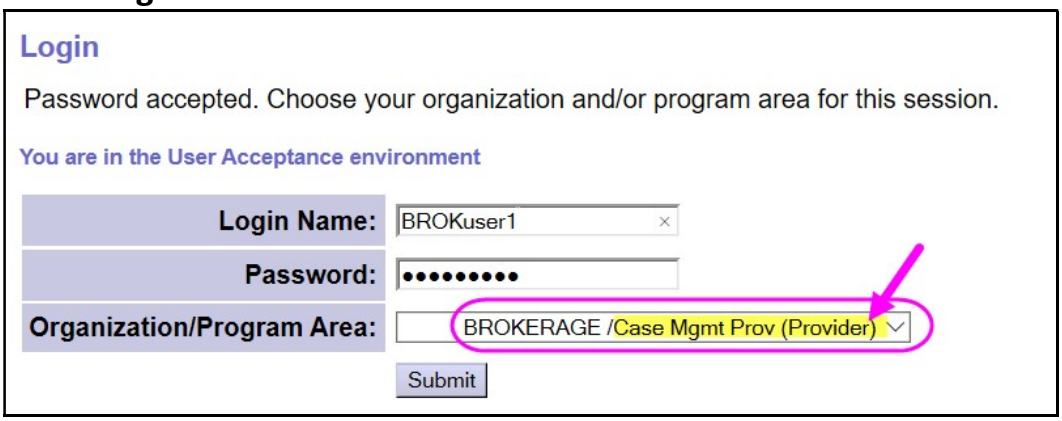
To create a NEW DDEE (0337) form without a Prime:

1. Log into eXPRS. You will need to select the ***Case Management (Provider)*** organization level when logging in to do this work.

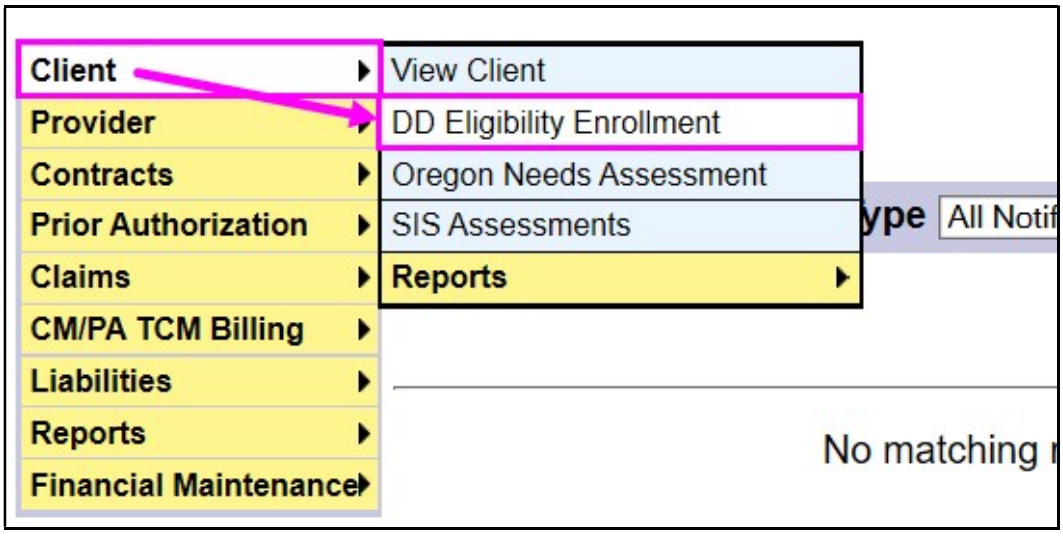
For **CDDPs**:



For **Brokerages**:

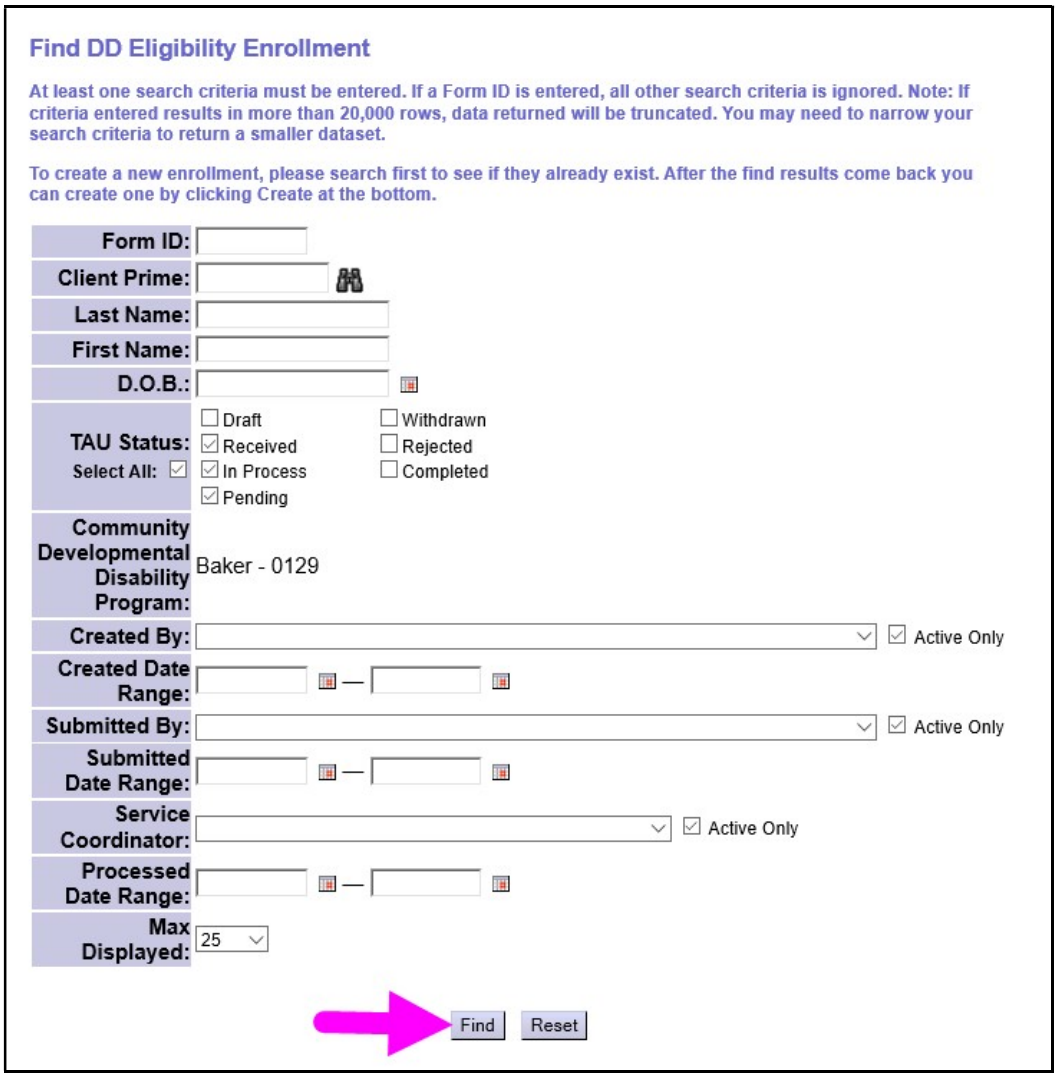


2. From the left-hand yellow navigation menu, select ***Client → DD Eligibility Enrollment***.

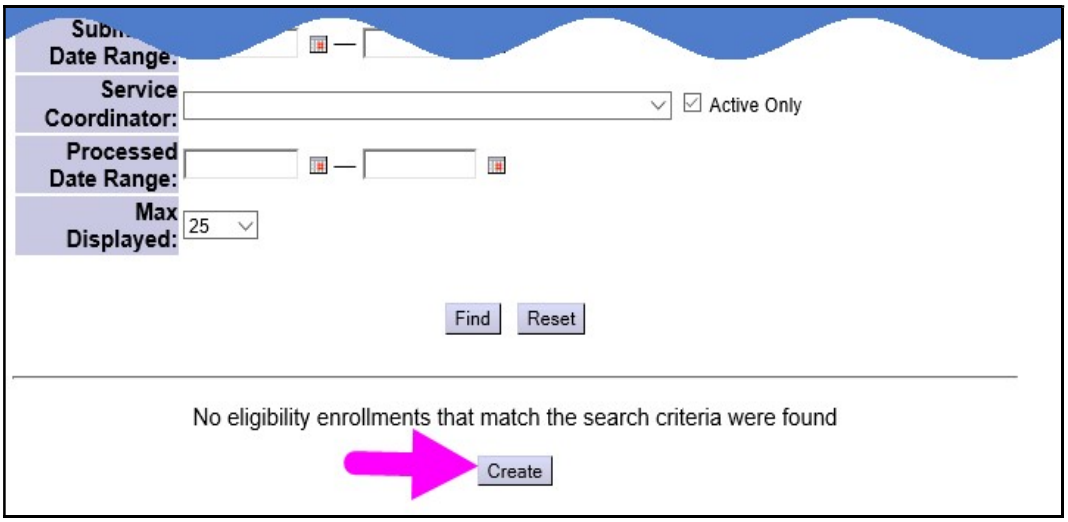


3. This will take you to the **Find DD Eligibility Enrollment** search page. In this page, you can search by clicking the Find button at the bottom of the page to trigger the Create button, or to see if there is an existing DDEE (0337) form for the individual you need to submit information on.

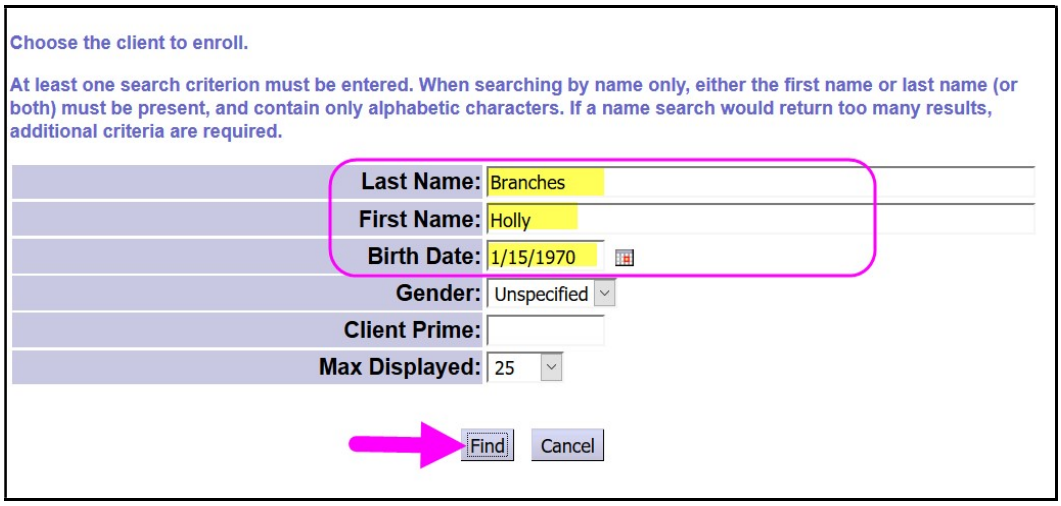
To trigger the **Create** button to appear, simply click **FIND**.



4. Then scroll to the bottom of the page and click on **Create** to create new DDEE (0337) Form.

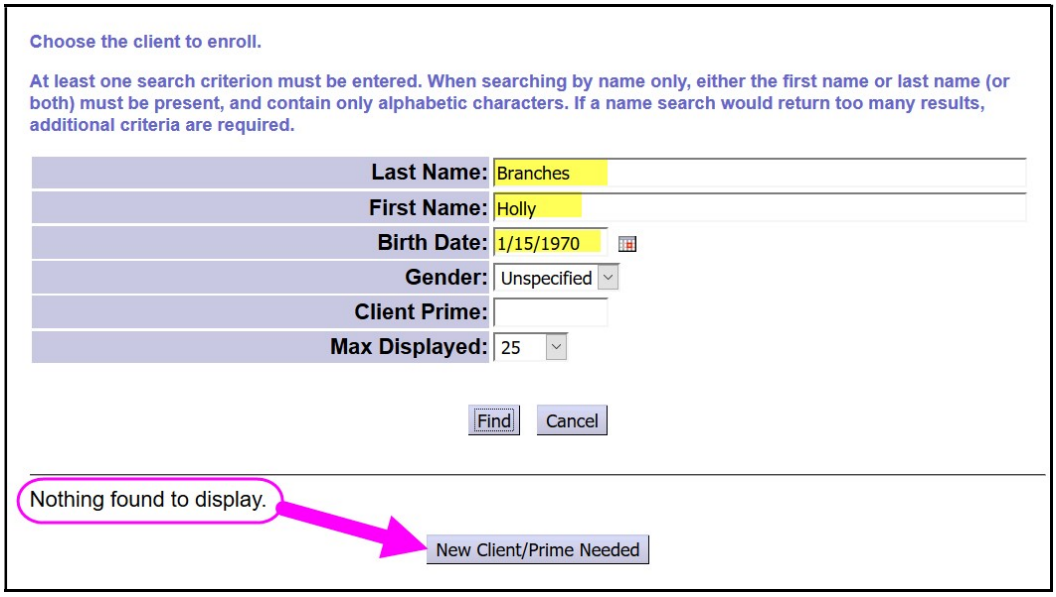


5. Once you click on **CREATE**, a smaller window will pop-up to help you search for the individual for whom you need to create a new DDEE (0337) form. For individuals who do not yet have a Prime Number, enter their **Last Name**, **First Name** & **Birth Date** for the individual in the corresponding fields & click **FIND**.



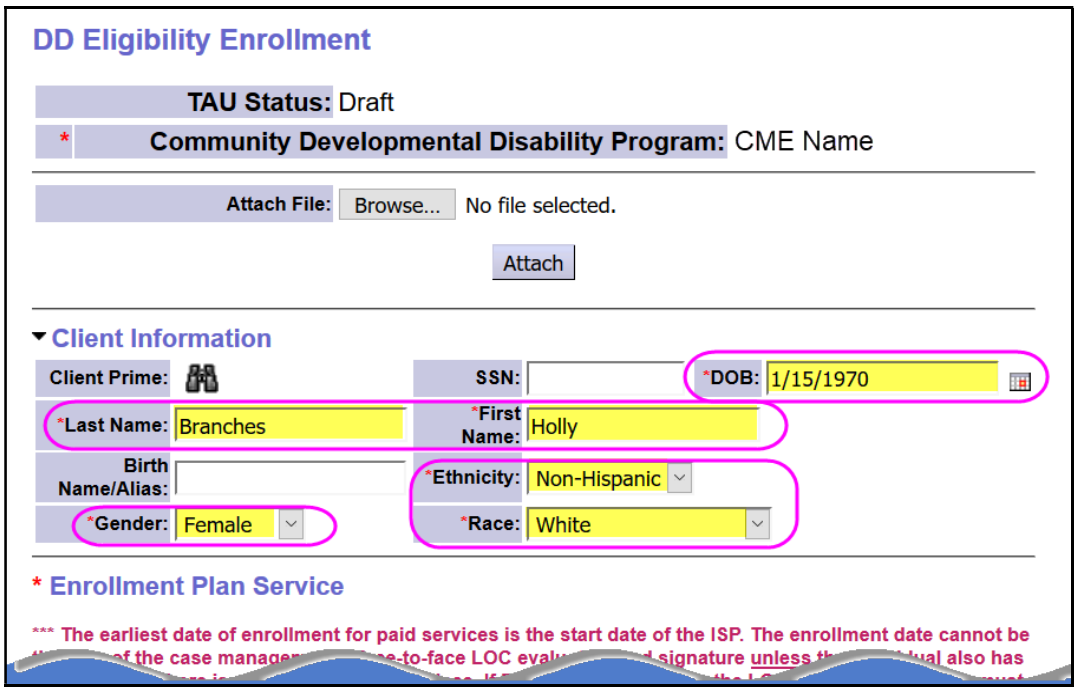
6. If DHS has no record for the individual you entered, you will get the message "**Nothing found to display**".

   Click on the **New Client/Prime Needed** button to continue.



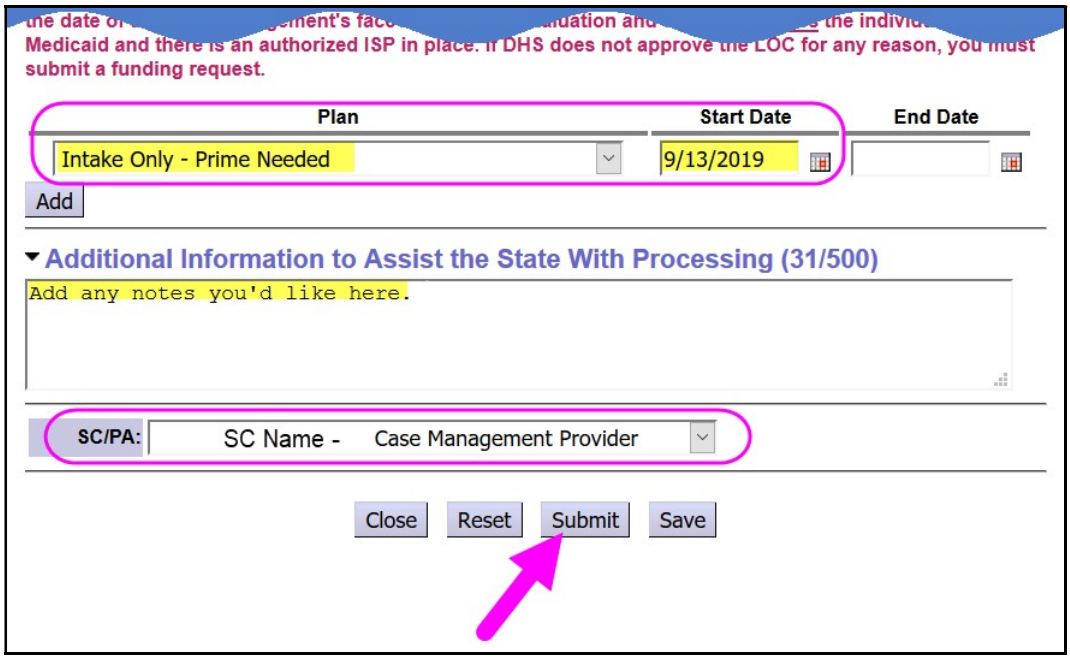
7. You will be returned to the main DDEE (0337) form page where you can enter the individual's information manually.

   In the **Client Information** section, complete all fields for the individual that are noted by a red asterisk (*).



8. Continue to complete the rest of the DDEE (0337) form for the individual. At a minimum, in the **Enrollment Plan Service** section, select "***Intake Only – Prime Needed***" from the **Plan** dropdown & add the date of intake in the **Start Date** field.

   Add any notes you'd like in the **Additional Information to …** field, then select the name of your agency staff who will be assigned to work with the individual from the **SC/PA** dropdown.



Click on the button to take the appropriate action on the DDEE (0337) form.

- **CLOSE =** will close the page. If you have not yet clicked **SAVE** *(which will save your information in **Draft** and assign the electronic form a form number)* you will lose all your data you've just entered.
- **RESET =** will clear the form & take you back to the client find process discussed in step #5 above.
- **SUBMIT =** will create a Form ID #, submit the completed form to the state DD TAU for processing with a TAU status of ***Received***. If an error was made on the DDEE (0337) form or this submission needs recalled, the CME can withdraw this DDEE (0337) form ***only*** if the TAU status is ***Received***.
- **SAVE** = will save the form in ***Draft*** & create a Form ID # so you can update information to the form, if needed, before submitting it to the DD TAU.