Office for People With Developmental Disabilities

Capacity Management Application (CMA)

Care Coordination Organization Quick Reference Guide

This application is used to manage housing for persons served by OPWDD. For more comprehensive instructions with screenshots, please see the Care Coordination Organization User Guide for Capacity Management.

First, log In to the CMA system using Multi-Factor Authentication as appropriate.

Adding a New Person to the system: create a new residential referral packet:

1. Click Packet Records on the left side menu
2. Click New on the menu across the top of the screen
   (The person must already have a TABS ID to enter a new residential referral packet)
3. Choose to search by either TABS ID or Demographic Info
   If demographic info is chosen, at least two criteria are required
4. Enter info to execute search by your preferred method
   a. System will show a button with "Create: [Last name, TABSID]" if search is successful or,
   b. System will tell you the search failed if the person is unable to be found
5. Click "Create: [Last name, TABSID]" and then "Navigate" to be taken to the newly created packet
   If the packet does not load immediately, click "refresh" to load.
6. Enter required General Information including the care manager phone number and supervisor
   The application uses this information to send OPWDD autogenerated messages from the application
7. Click "save" on the menu across the top of the screen
   The status "-Saved" should appear just after the person's name on the top left of the packet record screen.
8. You can exit and revisit later by navigating to the person's packet through left pane menu options, "Individual" or "Packet Record"

Add H005 CRO Referral: This is a required form and will be added to the packet by the system. From inside the Packet Record, the H005 – Certified Residential Opportunities section is visible.

1. Click "[Person's Name] – H005" to access the draft H005 Referral Form
2. Enter appropriate information into all applicable fields of the form
   - Required fields are marked with a red asterisk
   - Home Region Demographics field must be updated to indicate if the home/responsible county is the same as the county OPWDD eligibility was established.
   - This form has a special "partial save" feature under "H005 actions" on the menu at the top of the page – use this often as you fill the form, saving the draft of the H005 form to ensure that no work is lost.
   - "Save" and "Save & Close" have a special function in this form of validating the completion of all required fields. They will not save an incomplete form but will tell you what fields are incomplete with a notification banner. Click into the banner for detailed info on incomplete fields.
   - "Required" residential considerations will require supporting documentation be uploaded in the documents section of the record.
3. While working on the H005, click "H005 actions" and "Partial Save" to save updates to draft.
4. When complete, click "H005 actions" and "Finalize"
   This will indicate that the form is ready to be submitted as part of the complete referral packet. All documents must be finalized before the packet can be submitted. Once "finalized", the packet cannot be edited.

Upload Necessary Documents: This is done in the "Documents (Packet)" section of the person's record. All core documents are pre-loaded with a standard file. The user can add additional documents as needed.

1. Complete all pre-loaded core documents by clicking on the row in the documents section
2. Fill in all fields and upload the document from computer files using the "browse" option.
   a. Date of signature/Date of document should match the date of documents, not date of entry.
   b. The date entered should be the date of person's signature on the document if there is a signature.

3. Click “Document Actions” and “Finalize” for each file as it is completed
   This will indicate that the document is ready to be submitted as part of the complete referral. All documents must be finalized before the packet can be submitted.

Add New Document Files as appropriate: If additional documents are needed that were not pre-loaded:

1. Within the Documents (Packet) section click “+ New OPWDD Document”
2. Choose the “Document Type” from the drop down and click the “Save” button to create the document file
3. Fill in any fields and upload the document as above.
4. Finalize all documents as above.
5. If needed, user can un-finalize using “Document Action” and choosing “Needs Review”.
6. User-added files in an unsubmitted packet record can be hidden using “deactivate” if added in error.

Submit Packet: Once all sections are completed and contents “Finalized”

1. Click “Packet Actions” on the menu at the top of the screen and choose “submit”
   This will verify that all packet contents are finalized. A notification banner will appear with details on any outstanding items. Once the packet is successfully submitted, the status will change from “Unsubmitted” to “Packet Submitted”.

Resubmitting Packets returned as “Missing Information, Needs Review” or “Require More Information”: If a packet is returned by OPWDD, you will receive both an email and a queue task item within the “My Work” section of the CMA. Resubmit only when all requested information has been completed/collected.

1. Click on My Work in the left side menu
2. Click on a task item to view the details, description of issues and the person’s name
3. Click on the person’s name to enter the related packet
4. Review, update and finalize all documents/forms indicating “Needs Review”.
   a. For those returned for Missing Information, the document flagged as “Needs Review” is one of the following: CAS/CANS/DDP2 is not completed or is not current, document is missing from the packet submitted, document is incomplete/missing pages, document is not current (within 365 days), document is not the appropriate document, or the document is not for the person’s intended packet.
   b. For those returned for More Information, the document flagged as “Needs Review” will also have a message requesting clarification or additional information be submitted for the committee to review.
   c. After uploading all (not partial) missing documents or adding more information, all documents flagged as “Needs Review” need to be updated to “Finalize”
5. Resubmit the packet by clicking “Packet Actions” on the menu across the top of the screen and choosing the “Update Packet” option. The packet status will update to “Resubmitted to Housing Liaison” or “Resubmitted to Committee” as appropriate.
6. Return to the Queue Task item and choose “Mark Complete” from the top menu to remove from your “My Work” list

Completed Packets: The NOD15 and/or H004 will be emailed to the user outside of the CMA from OPWDD once a packet is complete. The care manager can access the person’s profile in the CMA system from the “Individuals” or “Packet Records” menus to see their last designation/determination information.

Cloning Packets: Once a packet is “Complete” a user has the option to “Clone Packet” from the top menu. This will open a new packet record, and the user must indicate either “Yearly Update” for any updates, and or “Review of Designation” as appropriate. If the H005 does not immediately populate in the cloned packet, use “refresh” to generate. It may take a few minutes to pull over the data. Then follow the process as above (for a new packet) to update the cloned packet. New updated documents will need to be uploaded to reflect any updated or current information.

Changing/Updating Care Manager: Limited within the respective Business Owning Unit, go to Individuals Profile, click “Change Care Manager” from the top menu and update Care Manager, Phone Number, Care Manager Supervisor data fields and select save and close.

Reports: Select reports are available by choosing “Reports” on the left menu.

Advanced Find: Options to customize filters for specific needs go to “edit columns” and “edit filters” and personalize results display.