Enrolling participant with Provider(s)

1. Once the DDO Provider and Participant have accepted the referral and the referral process is complete, the DDO Provider needs to be added to the CMA/Service Provider tab. The following is the process for enrolling the participant with DDO Provider in the **CMA/Service Provider** tab.
    a. Within the **actual participant's record**, click on **CMA/Service Providers** tab
    b. Click **File, Add CMA/Service Provider**
    c. Select the **CMA/Service Provider** by clicking the **ellipsis (…)** and searching for the Provider agency (**see list of Provider IDs**)
        i. Enter at least the first three letters of the Provider name in the box and click search **OR** change Search By drop down to Vendor ID and add the Provider ID in search text box and click search.
        ii. From the records returned, select the Provider Agency
        iii. **Caution:** Be select the correct instance (agency vs FI) when an agency has both instances
    d. Change **Case Manager**
        i. Click **Lookup** in Case Manager row
        ii. In Search text box, search for DDO Provider Worker
            1. Enter at least three letters of the person's last name (add named contact or who you were corresponding with in Referral Note).
            2. You can also change the drop down in the search box to Provider. Type provider name and click search to see all workers associated with the provider. Then select the worker.
        iii. Click the correct name/worker
        iv. If unable to search for provider worker, leave Case Manager field as is
    e. From the Disposition drop down, select **Open**
    f. Click **File, Save CMA/Service Provider**

Note: If the provider was added previously but the status is Closed, the provider will need to be added again.

Ending Service Provider (CMA/Service Provider tab)

1. From the participant's record, click on CMA/Service Provider tab
2. Click on the row of the CMA/Service provider you wish to end.
3. Click on the **Disposition** drop down and select **Closed**
    a. Next to **Closure Type, leave blank (no change needed)**
    b. Next to **Close Date**, select the date the participant was closed to Service Provider

c. Next to **Outcome**, add details including reason and information regarding closure
d. Click **File, Save CMA/Service Provider**

3. On the left side menu, select **CMA/Service Provider Workers**
   e. Click **File, Assign CMA/Service Provider Worker**
   f. Click **Lookup**
   g. In the search bar, enter **BHDDH or Closed** (for worker name) and click search
   h. Click on the record returned = **BHDDH, Closed** or **Closed, Case**
   i. Click **File, Save and Close Referral Worker**
   j. On the line with the newly added worker (BHDDH, Closed or Closed, Case), click the (unmarked) box on the right at the end of the row
   k. From the **Tools** menu, select **Designate as Primary**
   l. This makes the selected worker the primary worker
   m. Click on row of the previous worker(s) listed (from the CMA/Service Provider agency)
   n. Select an **End Date** for the worker
   o. Uncheck the box next to Active
   p. Click **File, Save and Close Referral Worker**

Note: If discharging participant from Provider mid plan year and provider still has active auths, the fiscal team will need to be notified so they can end the auths.

Notifying Fiscal

1. Click on **Notes** tab
2. Click **File, Add Note**
3. From **State Agency/Program** drop down, select **BHDDH/IDD/HCBS**
4. From **Note Type** drop down, select **Documentation**
5. From Note Subtype drop down, select **Other**
6. In **Other (Describe)** *AND* **Description** text box add a detailed description **= End auths for [Agency] as of [date].**
7. In **Note** text box, include a brief note, if needed
8. Add Fiscal team members Nicholas Girardi and Lowell Hillman as **Note Recipients**
   a. Click **Lookup** under **Note Recipients**, next to **Add Note Recipient**.
   b. In the **Search Text** box, enter at least the first three letters of the recipient's last name (searching for provider contact for referral)
   c. Click **Search** and select the recipient from the list of names
   d. The recipient's name(s) will now appear in the **Note Recipients Grid**. This grid displays all recipients that will receive the note.
9. From **Status** drop down, select **Pending**
10. Click **File, Save and Close Notes**