



**Office for People With
Developmental Disabilities**

**Service Amendment Request Tool
(SART) CHOICES User Guide for
Care Coordination Organizations
(CCOs)**



Service Amendment Request Tool (SART) CHOICES User Guide for Care Coordination Organizations

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Introductions and Instructions for How to Navigate this User Guide

This User Guide has been developed to provide technical instructions to Care Coordination Organization (CCO) staff on how to create and submit a Service Amendment Request Tool (SART) in the Office for People With Developmental Disabilities (OPWDD) CHOICES system.

There are links throughout this guide that will bring the reader to other locations within the document.

It is OPWDD's goal to keep this User Guide current to the best extent possible. Revisions will be made as needed when any service system or process changes impact the SART within CHOICES. Future updates made to this guide will be shared with CCOs.

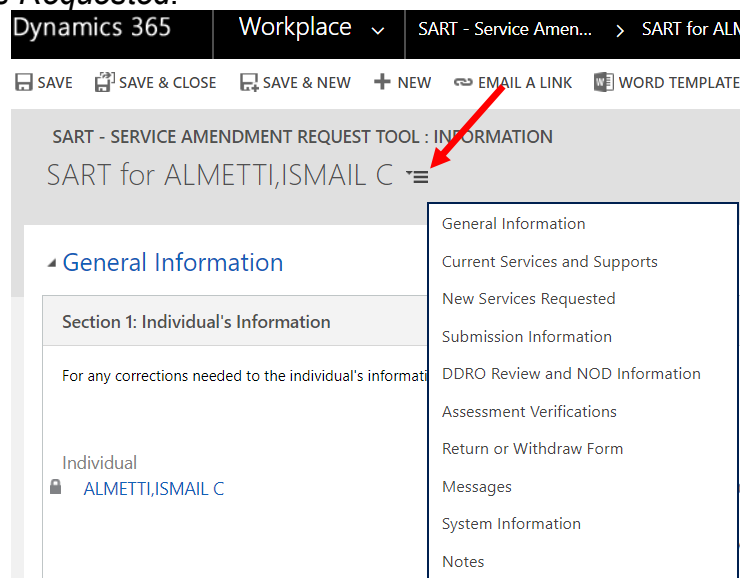
Further information regarding the Service Amendment process and policies can be found in the *Service Amendment Request Tool (SART) Manual*.

Disclaimer

The information shown in this guide is in the CHOICES Testing Environment and is entirely fictitious and used for illustrative purposes only. The examples given are not related to any real people and are provided to demonstrate how the tool functions but, are not intended to be used as a model for real-life scenarios.

Form Sections Menu

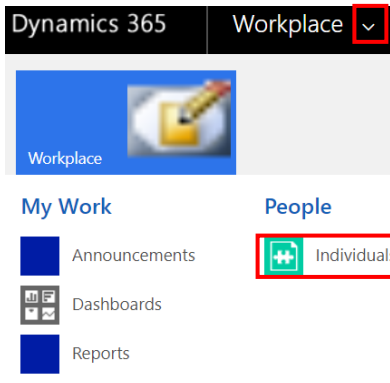
To navigate to different sections within the SART once it has been opened, there is a *Form Sections* menu (icon of 3 lines next to the title of the SART, *SART for Last Name, First Name* ☰). Click on the icon ☰ to display the *Form Sections* menu which lists the different sections of the SART that the user can move to directly by clicking the name of Section. For example, New Services Requested moves the user to *Section 8 – New OPWDD Services Requested*.



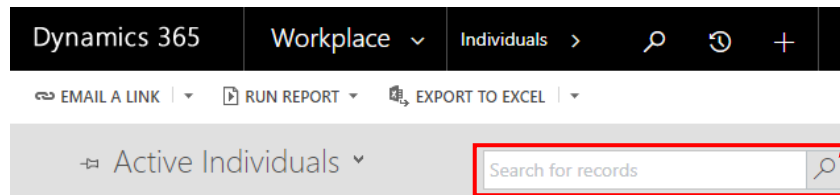
The screenshot shows the Dynamics 365 interface for the SART tool. The breadcrumb trail is "Dynamics 365 > Workplace > SART - Service Amen... > SART for ALM". The main title is "SART - SERVICE AMENDMENT REQUEST TOOL : INFORMATION" and the specific SART title is "SART for ALMETTI,ISMAIL C". A red arrow points to the menu icon (☰) next to the SART title. The menu is open, showing the following options: General Information, Current Services and Supports, New Services Requested, Submission Information, DDRO Review and NOD Information, Assessment Verifications, Return or Withdraw Form, Messages, System Information, and Notes. The "General Information" section is currently selected and expanded, showing "Section 1: Individual's Information" and a sub-section for "Individual" with the name "ALMETTI,ISMAIL C".

Creating a New SART

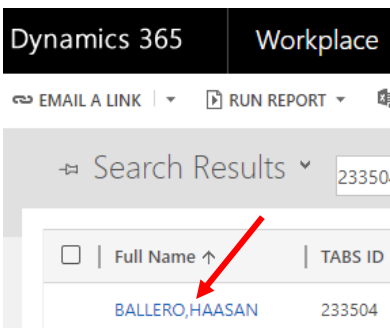
Navigate to the *Individuals* section of CHOICES. Click the arrow next to *Workplace* then click *Individuals* under the *People* column.



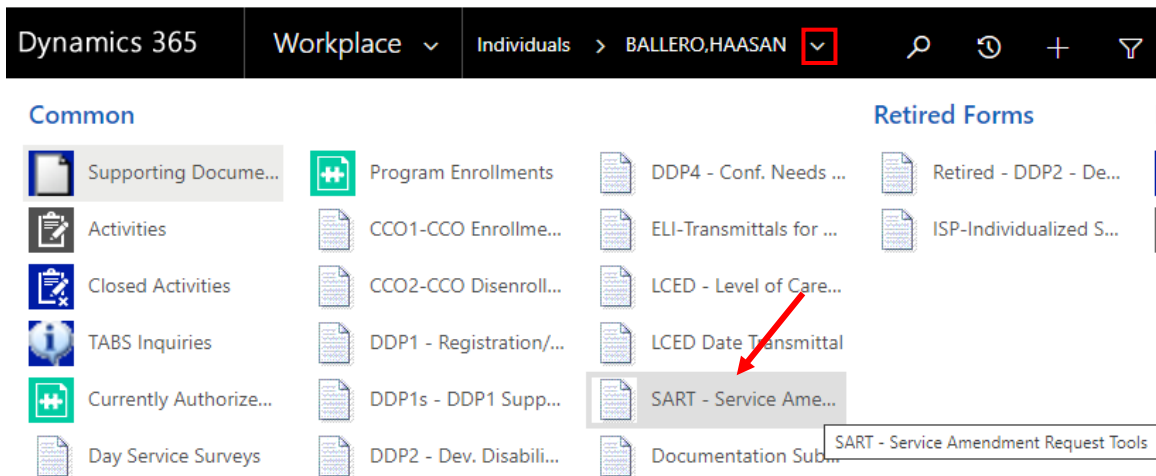
Next type the person's name (format must be: *Last Name,First Name* with no spaces) or type their TABS ID into the *Search for records* box and click the search icon (magnifying glass) or hit the enter key on your keyboard.



Then click the hyperlink of person's *Full Name* to bring you to the person's *Individual: Information* record in CHOICES.

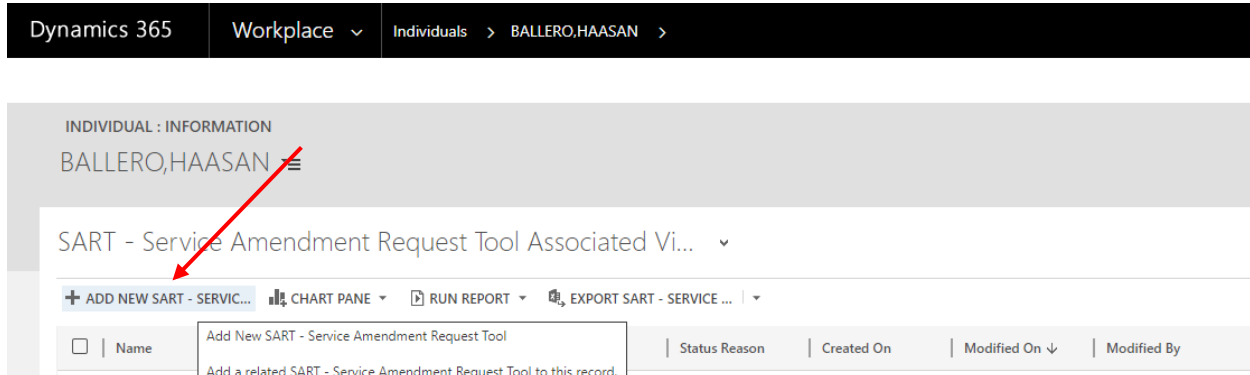


Once at the person's *Individual: Information* record, click the arrow next to the person's name to display the sections of the person's CHOICES record. Then click *SART – Service Amendment Request Tools*.



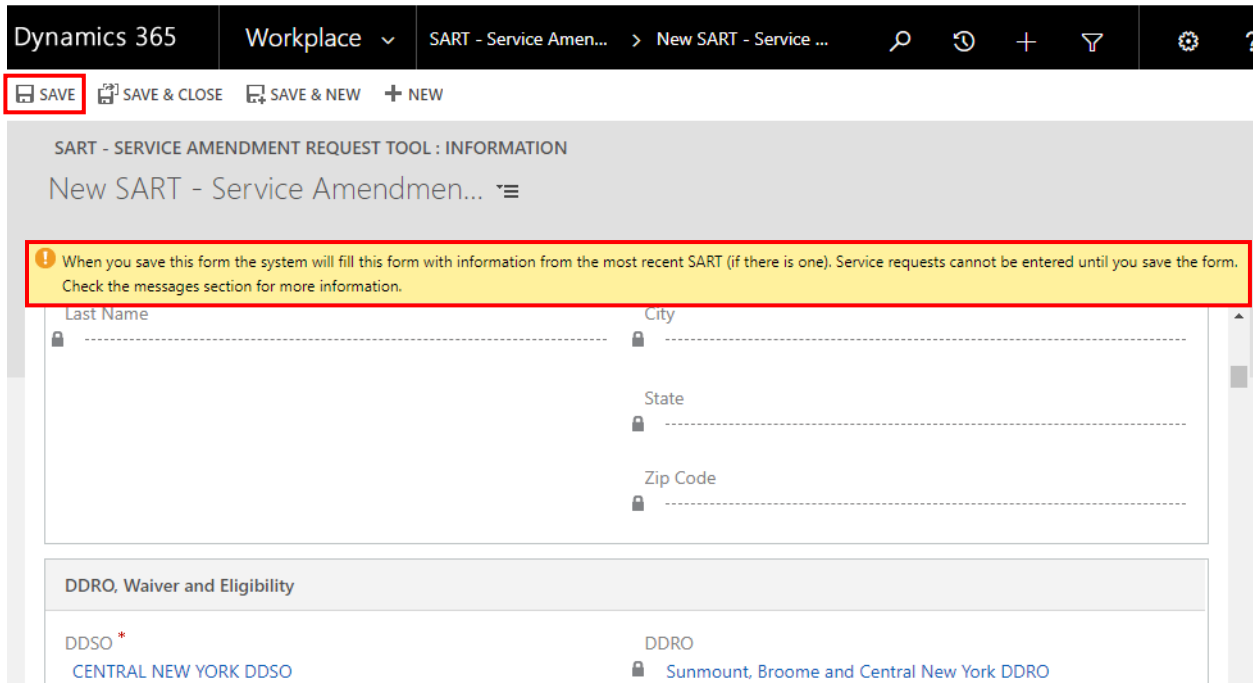
The screenshot shows the Dynamics 365 interface for the user BALLERO,HAASAN. The navigation pane on the left includes sections for 'Common' and 'Retired Forms'. In the 'Common' section, the 'SART - Service Ame...' form is highlighted with a red arrow. A tooltip for this form is visible, showing 'SART - Service Amendment Request Tools'.

After the SART Form Section opens, click + *Add New SART – Service Amendment Request Tool* to create a new SART.



The screenshot shows the Dynamics 365 interface for the user BALLERO,HAASAN. The navigation pane on the left includes sections for 'Common' and 'Retired Forms'. In the 'Common' section, the 'SART - Service Ame...' form is highlighted with a red arrow. A tooltip for this form is visible, showing 'SART - Service Amendment Request Tools'.

A *New SART – Service Amendment Request Tool* pop-up window will open. The SART will display at the bottom of the *Legal Guardian Information* Section. Click *Save* immediately so that information can be entered (the yellow message box reminds you to do this).



Dynamics 365 Workplace SART - Service Amen... > New SART - Service ...

SAVE SAVE & CLOSE SAVE & NEW + NEW

SART - SERVICE AMENDMENT REQUEST TOOL : INFORMATION

New SART - Service Amendmen... ☰

! When you save this form the system will fill this form with information from the most recent SART (if there is one). Service requests cannot be entered until you save the form. Check the messages section for more information.

Last Name City

State

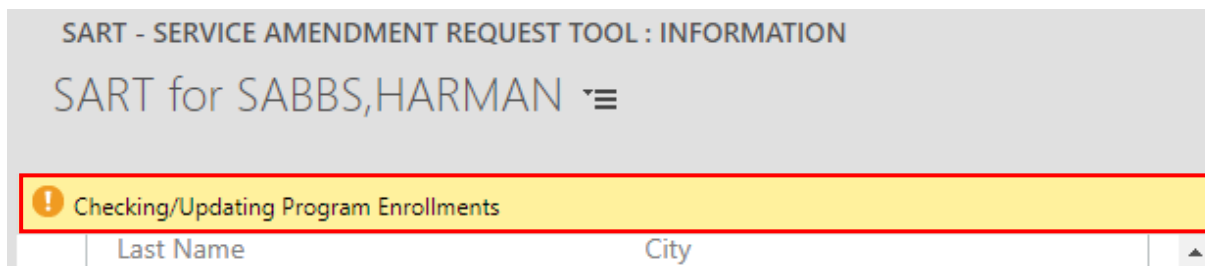
Zip Code

DDRO, Waiver and Eligibility

DDSO * DDRO

CENTRAL NEW YORK DDSO Sunmount, Broome and Central New York DDRO

A second yellow highlighted message displays immediately after you click *Save*. Allow the SART to finish processing all messages and then scroll to *Section 1 – Individual’s Information*.



SART - SERVICE AMENDMENT REQUEST TOOL : INFORMATION

SART for SABBS,HARMAN ☰

! Checking/Updating Program Enrollments

Last Name City

Section 1 – Individual’s Information

Section 1 – Individual’s Information contains the person’s demographic information that auto populates from the person’s record. This section is never editable. Any corrections **must** be made through the submission of a Developmental Disabilities Profile 1 (DDP1) for a demographic change.



SART - SERVICE AMENDMENT REQUEST TOOL : INFORMATION

SART for SABBS,HARMAN

General Information

Section 1: Individual's Information

For any corrections needed to the individual's information below, please complete and submit a DDP1 for demographic data change.

Individual	
<p> SABBS,HARMAN</p>	<p>Date Of Birth * 12/6/1970</p> <p>Medicaid Number (CIN) AG59103D</p> <p>Address Line 1 * 8267 TURIN ROAD</p> <p>Address Line 2</p> <p>Address City * ROME</p> <p>Address State NEW YORK</p> <p>Address Zipcode 13440</p> <p>County Of Residence ONEIDA</p> <p>Residence Type OMRDD/Agency Operated Residence</p> <p>Residence Type - Additional Optic</p>
<p>TABS ID</p> <p> 59103</p>	

Legal Guardian Information

The question: *Does the individual have a legal guardian?* automatically defaults to No. If the person has a Legal Guardian, change the response to Yes and complete all the other text fields.

SART - SERVICE AMENDMENT REQUEST TOOL : INFORMATION

SART for SABBS,HARMAN

Legal Guardian Information	
<p>Does the individual have a legal guardian?</p> <p>No</p>	<p>Address Line 1</p> <p></p>
<p>First Name</p> <p></p>	<p>Address Line 2</p> <p></p>
<p>Last Name</p> <p></p>	<p>City</p> <p></p>
	<p>State</p> <p></p>
	<p>Zip Code</p> <p></p>

DDRO, Waiver and Eligibility

This section will auto populate and only the DDSO field is editable. If changing the selected DDSO results in a different DDRO, the correct DDRO will auto populate.

To edit the selected DDSO, hover over the field and the search icon (magnifying glass) will display. Click the search icon then click the *Look Up More Records* hyperlink to open the Lookup Record pop up window and all the available DDSOs to select from will display.

DDRO, Waiver and Eligibility

DDSO *
CENTRAL NEW YORK DDSO

DDRO
Sunmount, Broome and Central New York DDRO

OPWDD Eligibility Status
Eligible

HCBS Waiver Enrolled?
Yes

DDRO, Waiver and Eligibility

DDSO *
CENTRAL NEW YORK DDSO

DDRO
Sunmount.

HCBS Waiver
Yes

Look Up More Records

1 result

Look Up More Records

In the Lookup Record pop up, click the X to remove the current DDSO selected.

Lookup Record

Enter your search criteria.

Look for

Look in

Search

Show Only My Records

Name ↑	DDSO Code	↻
<input checked="" type="checkbox"/> CENTRAL NEW YORK DDSO	0261	

Then scroll through the list to select the desired DDSO, then click *Add*.

Lookup Record ×

Enter your search criteria.

Look for: Show Only My Records

Look in:

Search:

Name ↑	DDSO Code	🔄
BERNARD M. FINESON DDSO	0230	
BROOKLYN DDSO	0235	
BROOME DDSO	0233	
<input checked="" type="checkbox"/> CAPITAL DISTRICT DDSO	0260	

1 - 15 of 15 (1 selected) Page 1

The selection added will then display on the SART. Click the Save button and that will save the selected DDSO the user added onto the SART. Now the newly selected/added DDSO will receive the SART once submitted. This action only changes the DDSO/DDRO that the SART is submitted to for review and completion. See the *Service Amendment Request Tool (SART) Manual* for instructions on how to change a person’s DDSO/DDRO throughout OPWDD databases.

Dynamics 365 Workplace SART - Service Amen... SART for SABBS,HAR...

SAVE & CLOSE SAVE & NEW + NEW DELETE EMAIL A LINK WORD TEMPLATES RUN R

SART - SERVICE AMENDMENT REQUEST TOOL : INFORMATION

SART for SABBS,HARMAN

DDRO, Waiver and Eligibility

DDSO *	DDRO
CAPITAL DISTRICT DDSO	Capital District, Hudson Valley and Taconic DDRO

Section 2 – Care Manager’s Information

The majority of fields within *Section 2 – Care Manager’s Information* auto populates from the CCO user’s CHOICES User Profile. The user **must** enter information into the



Care Manager’s Title, Supervisor’s Name and Supervisor’s Email as these required fields **do not** auto populate any information. The user cannot edit the auto populated information. Changes to those fields can made in the CHOICES User Profile.

Section 2: Care Manager's Information

Care Manager Completing this Form
chtrain15 chtrain15

Full Name * chtrain15 chtrain15

Main Phone * 555-555-5555

Primary Email chtrain15@cco.org

Title
.....

CCO Name *
LIFEPLAN CCO NY, LLC

Supervisor's Name
.....

Supervisor's E-mail
.....

Section 3 – Developmental Disabilities

Section 3 – *Developmental Disabilities* auto populates the person’s primary diagnosis information recorded in TABS/CHOICES at the time they were determined OPWDD eligible. This section is not editable.

Section 3: Developmental Disabilities

Primary Diagnosis at Eligibility List any other relevant conditions (when present)
Moderate intellectual disabilities

Primary Diagnosis at Eligibility - Code
F71

Section 4 – Education Information

Section 4 – *Education Information* requires the CCO to answer the question *Is the Individual currently attending school?* The answer to this question automatically defaults to *No*. If the person is currently attending school, change the response to *Yes* and complete the other required fields as appropriate. Either the *10 Month Student?* box or *12 Month Student?* box **must** be checked and a *Projected Graduation Date* **must** be entered. Both check boxes **cannot** be checked off at the same time.

Section 4: Education Information

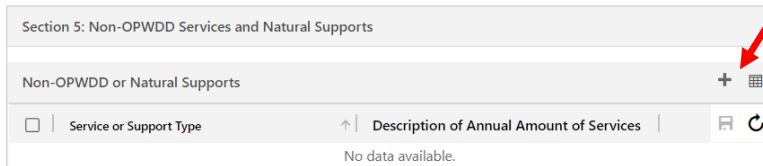
Is the Individual currently attending school?
No

10 Month Student? 12 Month Student?

Projected Graduation Date
.....

Section 5 – Non-OPWDD Services and Natural Supports

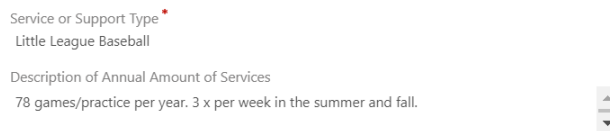
Non-OPWDD Services and Natural Supports are added to *Section 5* by clicking the **+** icon.



Section 5: Non-OPWDD Services and Natural Supports	
Non-OPWDD or Natural Supports	
Service or Support Type	Description of Annual Amount of Services
No data available.	

The *Quick Create: SART Non-OPWDD or Natural Support* window will pop up. The

[Quick Create: SART Non-OPWDD or Natural Support](#) ×



Service or Support Type*

Little League Baseball

Description of Annual Amount of Services


78 games/practice per year. 3 x per week in the summer and fall.

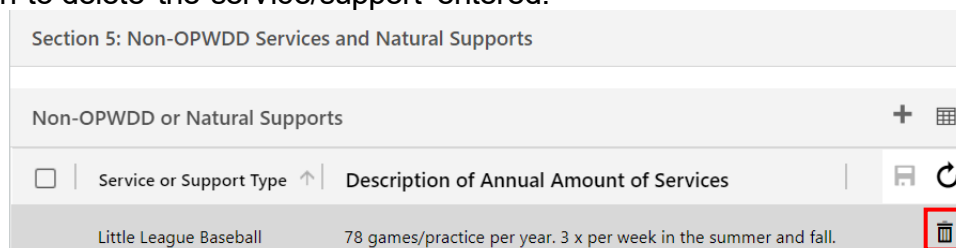
Save Cancel

Service or Support Type field is required. Only one service/support can be entered at a time. A new entry **must** be created for each service/support. Click *Save* to add the service/support onto the person's SART.

To add more services/supports, click the **+** icon to open another *Quick Create: SART Non-OPWDD or Natural Support* pop up window, enter the applicable information, click *Save*, and repeat as necessary to add all applicable services/supports.

The saved service/support now displays on the SART.

If necessary, a service/support can be deleted. Hover over the service/support line, it will highlight in gray and the delete icon (garbage can symbol ) will display. Click the delete icon to delete the service/support entered.



Section 5: Non-OPWDD Services and Natural Supports	
Non-OPWDD or Natural Supports	
Service or Support Type	Description of Annual Amount of Services
Little League Baseball	78 games/practice per year. 3 x per week in the summer and fall.

Section 6 – Current OPWDD Services Enrolled

The information in *Section 6 – Current OPWDD Service Enrolled* auto populates the person’s active program code enrollments from their TABS/CHOICES record. This information will only display once the SART is *Saved*.

Section 6: Current OPWDD Services Enrolled			
Current OPWDD Supports As Of Date 11/14/2023			
Program Code ↑	Program Class	Program Type	Enrollment Start Date
02330170 -- CLINIC	CLINIC	CLINIC	4/10/2006
60660810 -- FSS-RESPITE	FAMILY SUPPORT SERVICES	DAY/EVENING RESPITE	5/30/2001
66010972 -- LP PLAN SUPPORT 0233	CARE COORDINATION ORGANIZATION (CCO)	BASIC HCBS PLAN SUPPORT	6/1/2018

Section 6 is never editable. Any necessary changes need to be requested through the DDP1 process.

Section 7 – Current OPWDD Services Authorized and Receiving

In *Section 7 – Current OPWDD Service Authorized and Receiving*, the user **must** enter:

1. The services the person is currently authorized for in the *Service Type* field,
2. Corresponding authorized service amounts for each *Service Type* in the *Current Annual Number of Service Units Authorized* field,
3. Service amounts the person is currently receiving for each *Service Type* in the *Current Annual Number of Service Units Receiving* field, and
4. Any requests to make a change in the person’s annual amount of service units authorized or current providers in the *Change(s) to Service* field.

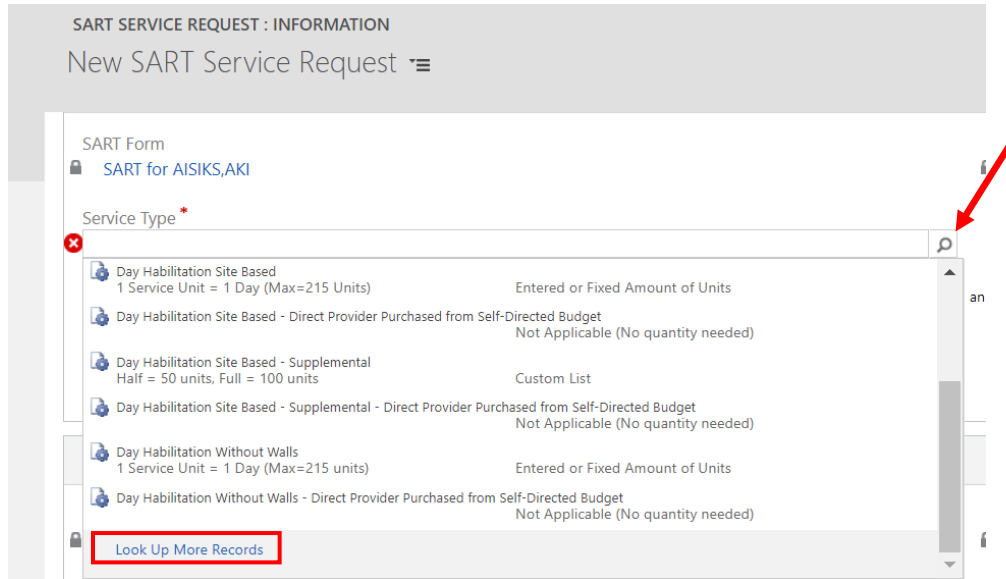
At a minimum, any SART *Service Type* that displays in *Section 6 – Current OPWDD Services Enrolled* **must** be entered in *Section 7*. Not all OPWDD services that display in *Section 6* are an available *Service Type* on the SART.

See [Subsequent SARTs](#) section below for information on how this section functions differently depending on if it is a person’s initial versus subsequent SART.

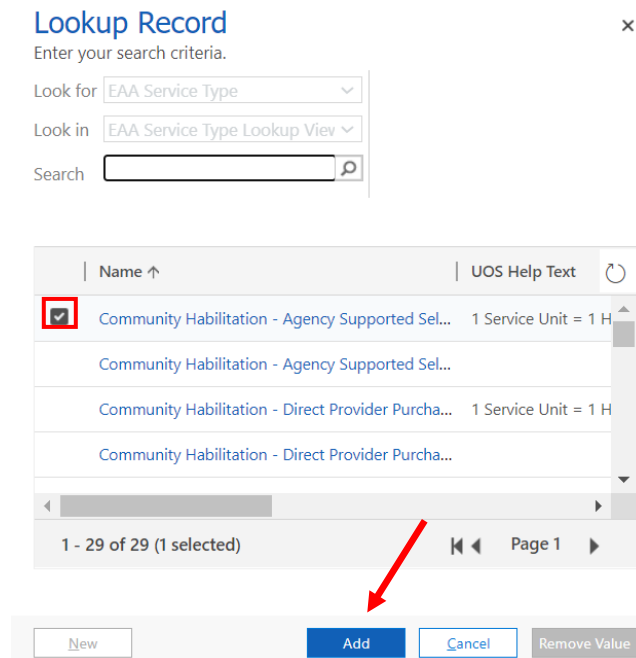
To add a service request, click the **+** icon.

SART for NAGEL,SHAYDAUIA S				
Section 7: Current OPWDD Services Authorized and Receiving				
Current Services Authorized and Receiving				+
Service Type ↑	Current Annual Number of Service Units Authorized	Current Annual Number of Service Units Receiving	Current Provider Name	Type of Request
 No SART Service Requests found for this SART - Service Amendment Request Tool. Select Add (+).				

The *New SART Service Request* window will open. Maximize the window for ease of use. Begin with adding the service the person is currently authorized for in the *Service Type* field. Click the search icon (magnifying glass) to open the *Service Type* list. If the *Service Type* is not visible, scroll down, and if necessary, click the *Look Up More Records* hyperlink to open the *Lookup Record* pop-up window to display the full list of *Service Types*.



To select a *Service Type* from the list, scroll down to the appropriate *Service Type*, check the box next to the *Name* of the *Service Type*, then click *Add*.



The selection added displays in the *Service Type* field. For *Section 7* service requests, the answer to *Has this service been previously authorized?* **must** be Yes. Once Yes is selected, additional fields unlock in *Section 7* .

New SART Service Request

General

SART Form: SART for NAGEL,SHAYDAUIA S

Individual: NAGEL,SHAYDAUIA S

Service Type *
Community Habilitation - Agency Supported Self-Directed with MOU

Has this service been previously authorized? *
Yes

Next the user will complete all required fields. Required fields are marked with a red asterisk (*). An error message will display if a required field is missing information.

Section 7: Current OPWDD Service Authorized and Receiving

Current Annual Number of Service Units Authorized *
100.00

Current Annual Number of Service Units Receiving *
75.00

Current Provider Name *
0233 - BROOME DDSO

Current Second Provider Name (if any)
.....

Current Third Provider Name (if any)
.....

Change(s) to Service? *
Increase Service Amount; Change Provider

Annual Number of Service Units Requested *
.....

Requested Provider Name *
.....

Hover over the *Change(s) to Service* field to display the down arrow, click the down arrow to display the *Change to Service(s)* options. Only five options in addition to *Select All* display at once. Scroll down the list to see the remaining options. Check off the applicable option for the *Service Type*. Multiple options can be checked off. For example, *Increase Service Amount* and *Change Provider*. *Select All* is not a functional option on the SART. Please ignore that option.

Change(s) to Service? *

Enter text here

Select All 6 Items

No Change

Add Provider

Change Provider

Discontinue Service

Change(s) to Service? *

Enter text here


Select All 6 Items

Change Provider

Discontinue Service

Increase Service Amount

Reduce Service Amount



Not all *Service Types* require entry within *Current Annual Number of Service Units Authorized* and *Current Annual Number of Service Units Receiving*. If the *Service Type* does not require the entry of service units, these fields will be locked for editing.

The user's selection in the *Change(s) to Service* field will determine when *Annual Number of Service Units Requested* and/or *Requested Provider Name* is required.

When *No Change* is checked, the *Annual Number of Service Units Requested* auto populates with the *Current Annual Number of Service Units Authorized* and, the field is locked and not editable.

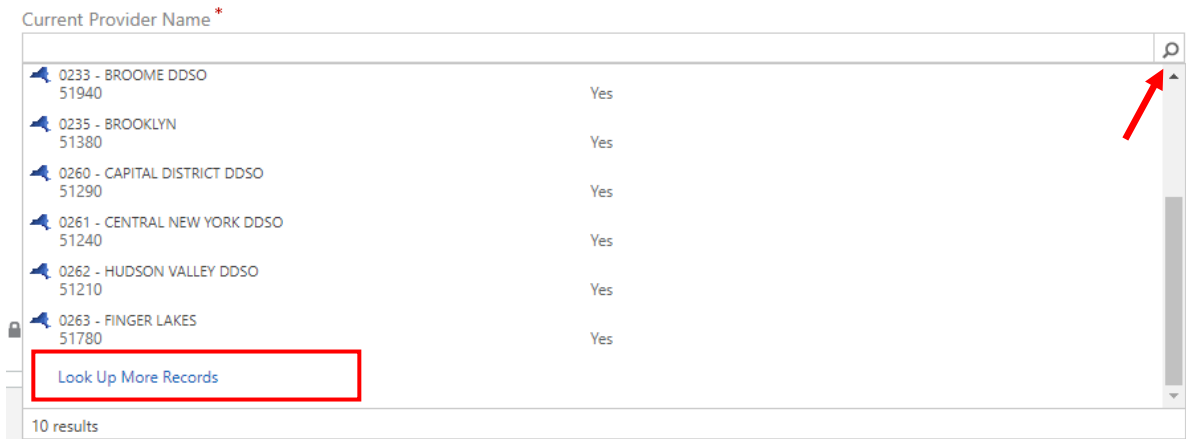
Section 7: Current OPWDD Service Authorized and Receiving

<p>Current Annual Number of Service Units Authorized * 100.00</p>	<p>Current Annual Number of Service Units Receiving * 75.00</p>
<p>Current Provider Name * 0233 - BROOME DDSO</p>	<p>Current Second Provider Name (if any)</p>
<p>Change(s) to Service? * No Change</p>	<p>Current Third Provider Name (if any)</p>
<div style="border: 2px solid red; padding: 2px;"> <p>Annual Number of Service Units Requested 100.00</p> </div>	<p>Requested Provider Name</p>

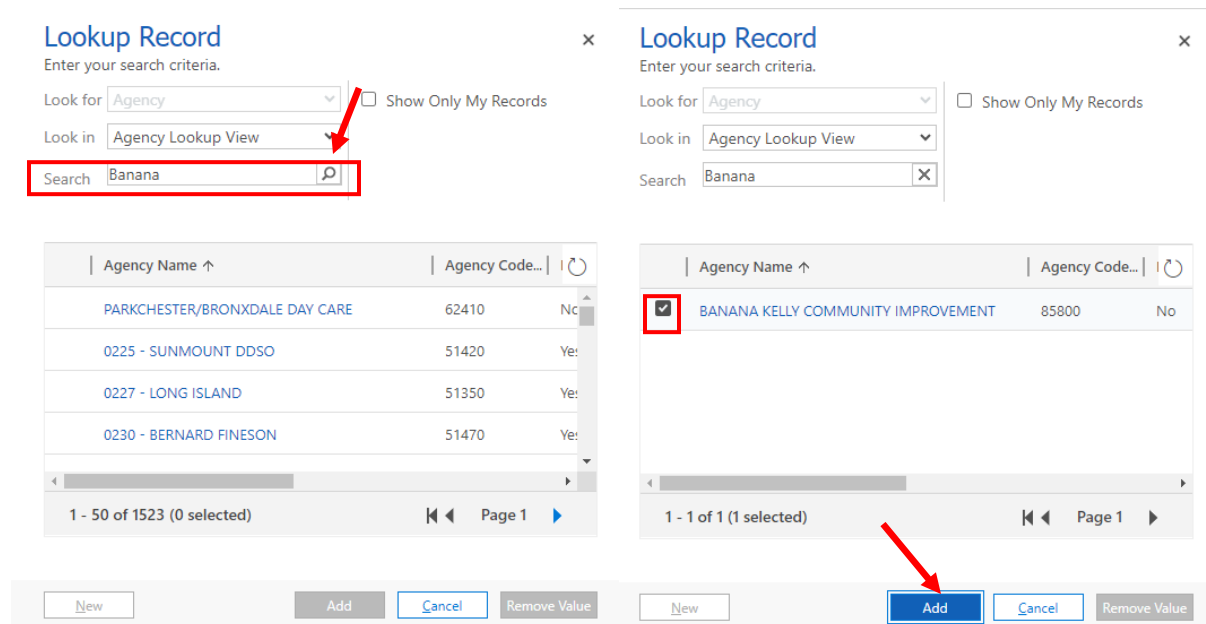
The *Annual Number of Service Units Requested* field **may not** be required since some *Service Types* **do not** require the entry of service units. If this field is not required, it will be locked for editing. When *Increase Service Amount* or *Reduce Service Amount* is checked the *Annual Number of Service Units Requested* **must** be entered by the user (if the *Service Type* requires the entry of service units). When *Increase Service Amount* or *Reduce Service Amount* are selected for a *Service Type* that does not require the entry of service units, the user will get an error message. When *Discontinue Service* is checked, the *Annual Number of Service Units Requested* will auto populate to Zero (0) and, the field will be locked and not editable.

To find the person's *Current Provider*, hover over the field to display the search icon (magnifying glass). If the desired provider does not display in the provider options

displayed, click the Look Up More Records hyperlink. The Lookup Record window will open.



Enter the provider's name in the *Search* box and click the search icon (magnifying glass). Find the correct provider and check the box next to the provider's name. Then click *Add*. If multiple providers need to be added, repeat these steps to enter information within the *Current Second Provider Name (if any)* and *Current Third Provider (if any)* fields.



If *Change Provider* or *Add Provider* is checked, select the provider in the *Requested Provider Name* field.



Dynamics 365 New SART Service Re...

SAVE SAVE & CLOSE SAVE & NEW + NEW

SART SERVICE REQUEST : INFORMATION

New SART Service Request

Section 7: Current OPWDD Service Authorized and Receiving

Current Annual Number of Service Units Authorized *	100.00	Current Annual Number of Service Units Receiving *	75.00
Current Provider Name *	0233 - BROOME DDSO	Current Second Provider Name (if any)
		Current Third Provider Name (if any)
Change(s) to Service? *	Change Provider; Increase Service Amount		
Annual Number of Service Units Requested *	125.00	Requested Provider Name *	0261 - CENTRAL NEW YORK DDSO

There is one *Service Type* where only three (3) options are allowed for the *Change(s) to Service* field, that is Pathway to Employment. The only allowable *Change(s) to Service* options are: *No Change*, *Change Provider*, or *Discontinue Service*. An additional *Pathway to Employment* sub-section displays. If the *Request Type (Purpose of submission)* field is completed with *Re-enroll a person into Pathway to Employment services and an extension to exceed allowable services limits has been approved by OPWDD Central Office* is selected, two additional fields will need to be completed.

Pathway To Employment

Request Type (Purpose of submission)

Re-enroll a person into Pathway to Employment services and an extension to exceed allowable service limits has been approved by OPWDD Central Office.

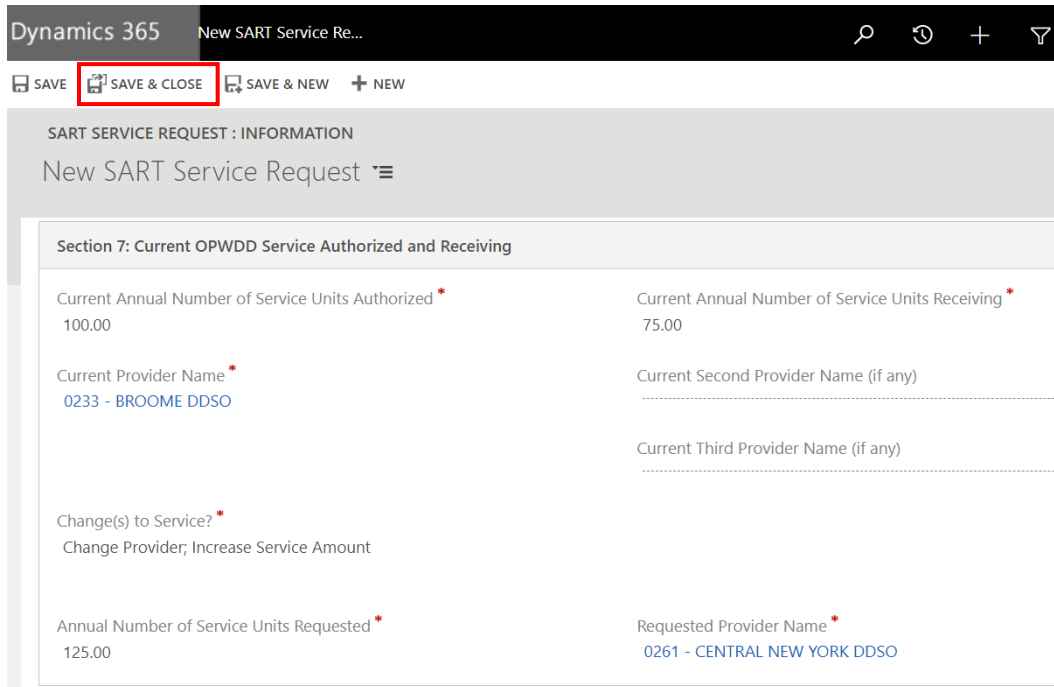
OPWDD Central Office Approval Number *

Date Approved *

Once information has been entered into all required fields, click *Save & Close*. The window closes and the user returns to the main SART window. If necessary scroll to *Section 7* to continue working in that section.

Only one service can be entered at a time. A new entry **must** be created for each service. To add more services, click the **+** icon to open another *New SART Service*

Request window, enter the applicable information, click *Save & Close*, and repeat as necessary to add all applicable services.



Dynamics 365 New SART Service Re...

SAVE SAVE & CLOSE SAVE & NEW + NEW

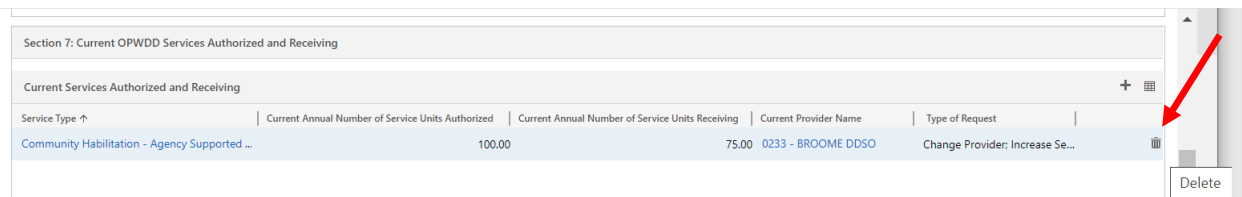
SART SERVICE REQUEST : INFORMATION


New SART Service Request

Section 7: Current OPWDD Service Authorized and Receiving

Current Annual Number of Service Units Authorized *	100.00	Current Annual Number of Service Units Receiving *	75.00
Current Provider Name *	0233 - BROOME DDSO	Current Second Provider Name (if any)	
Change(s) to Service? *	Change Provider; Increase Service Amount	Current Third Provider Name (if any)	
Annual Number of Service Units Requested *	125.00	Requested Provider Name *	0261 - CENTRAL NEW YORK DDSO

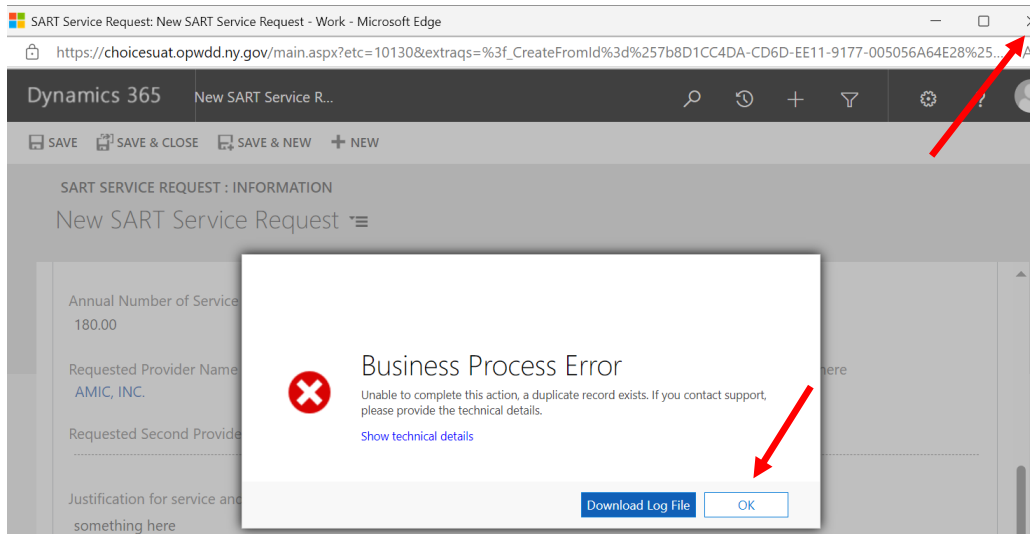
A service request can be deleted by hovering over the *Service Type* to highlight the desired row in blue, then the delete icon (garbage can) will display. Click the delete icon so that the service request no longer displays.



Service Type ↑	Current Annual Number of Service Units Authorized	Current Annual Number of Service Units Receiving	Current Provider Name	Type of Request	
Community Habilitation - Agency Supported ...	100.00	75.00	0233 - BROOME DDSO	Change Provider; Increase Se...	

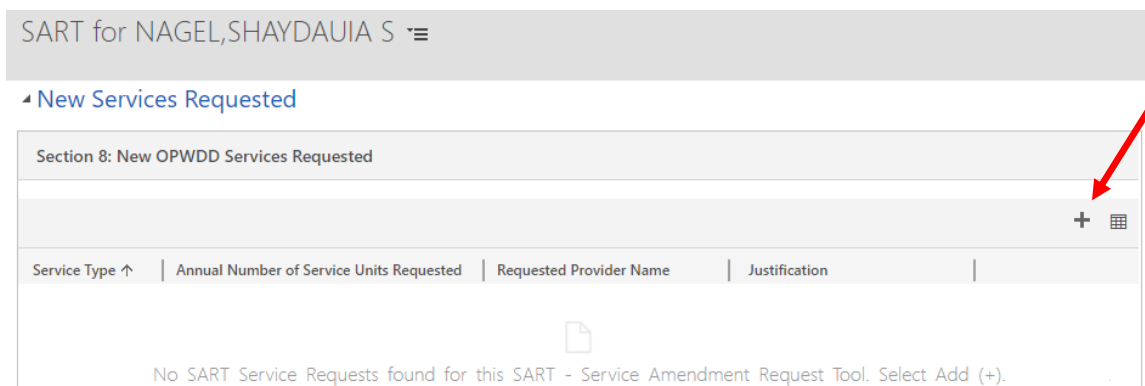
Delete

A user cannot add the same *Service Type* more than once. The user will receive a *Business Process Error* pop-up. Click *OK* on the *Business Process Error* pop-up and edit the information as applicable or if the service request has not been saved, close the *New SART Service Request* pop-up window by clicking the *X*.



Section 8 – New OPWDD Services Requested

Click the **+** icon to open a new service request.



The *New SART Service Request* window opens. Maximize the window for ease of use. Begin with adding a service the person is requesting (i.e., not currently authorize for) in the *Service Type* field. Click the search icon (magnifying glass) to open the *Service Type* list. If the *Service Type* is not visible, scroll down, and if necessary, click *Look Up More Records* to open the *Lookup Record* window to display the full list of *Service Types*. See instructions provided [above](#) in *Section 7 – Current OPWDD Services Authorized and Receiving* for how to use the *Service Type Look Up Records* window.

Once the *Service Type* displays, select *No* as the answer to *Has this service been previously authorized?* The answer **must** be *No* because *Section 8* is only used to enter service requests for new services that the person is not currently authorized for. Once *No* is selected, *Section 8* of the *New SART Service Request* window displays.



New SART Service Request

SART Form SART for NAGELSHAYDAUIA S	Individual NAGELSHAYDAUIA S
Service Type* Day Habilitation Site Based	Has this service been previously authorized? No

If the *Service Type* requires the entry of *Annual Number of Service Units Requested*, service units **must** be entered in this field. Select a provider in the *Requested Provider Name (if known)*. If the provider is not known, check the *If provider is not known at this time, check here* box.

Dynamics 365 | New SART Service R...

SAVE SAVE & CLOSE SAVE & NEW + NEW

SART SERVICE REQUEST : INFORMATION

New SART Service Request

SART Form SART for NAGELSHAYDAUIA S	Individual NAGELSHAYDAUIA S
Service Type* Day Habilitation Site Based	Has this service been previously authorized? * No

Answer 'yes' to the question 'Has this service already been authorized?' if the service has been authorized on previous form (for example, an EAA form). Answer 'no' if this is a new service request. New service requests will be shown in section 8 or the SART form and previously authorized services will be shown in section 7 of the SART form.

Unit Conversion 1 Service Unit = 1 Day (Max=215 Units)

Section 8: New OPWDD Service Request

Annual Number of Service Units Requested *

Requested Provider Name (if known) If provider is not known at this time, check here

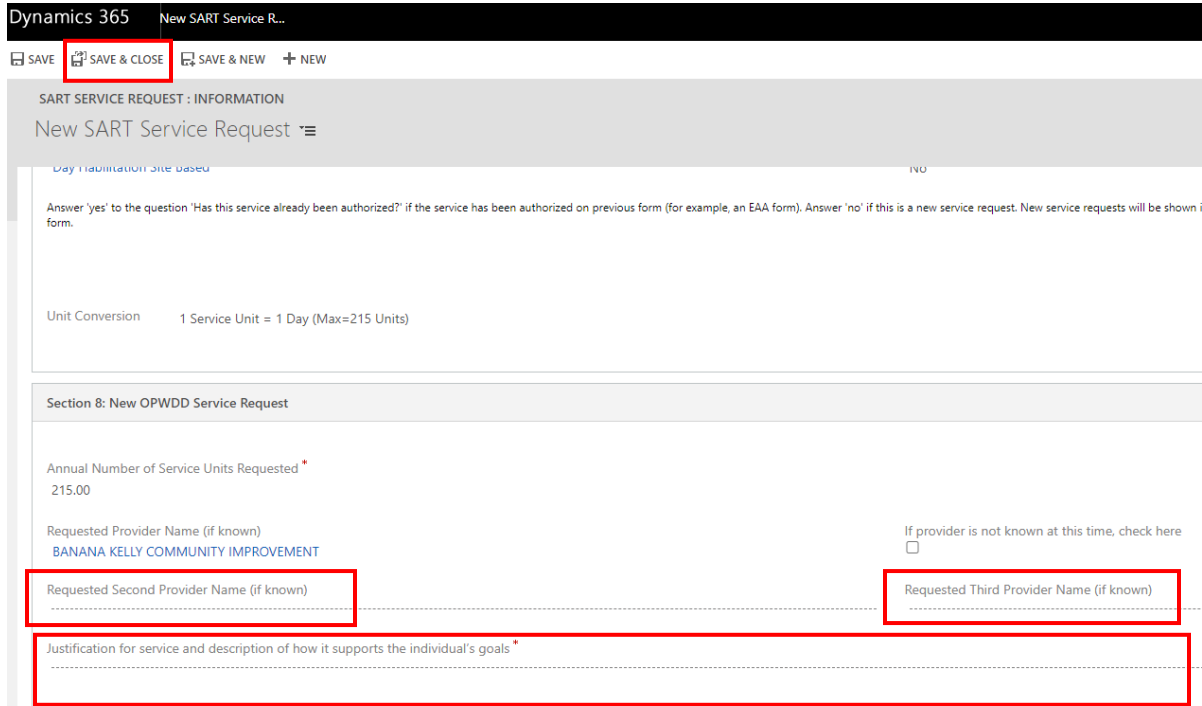
Requested Second Provider Name (if known) Requested Third Provider Name (if known)

Justification for service and description of how it supports the individual's goals *

If the Provider is known, then hover over the field to display the search icon (magnifying glass). If the desired provider does not display in the provider options displayed, click the Look Up More Records hyperlink. The Lookup Record window will open. See instructions [above](#) in *Section 7 – Current OPWDD Services Authorized and Receiving* for how to use the *Provider Lookup Record* window.

If multiple providers need to be added, repeat the above steps to enter information within the *Requested Second Provider Name (if known)* and *Requested Third Provider*

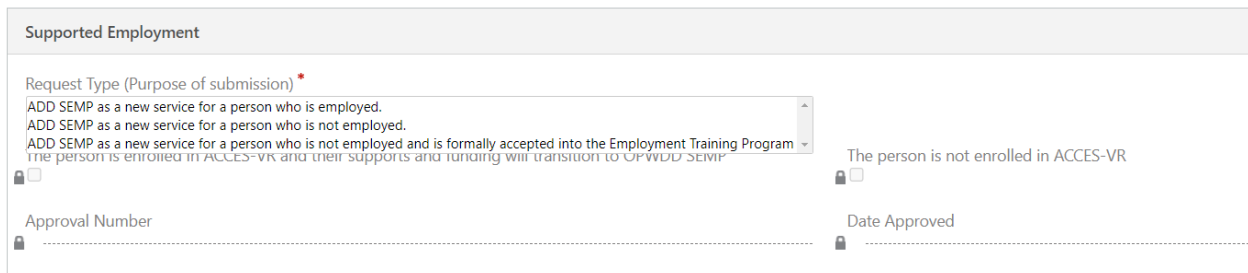
(if known) fields. Enter information into the *Justification for services and description of how it supports the individual's goals*. Then click *Save & Close*.



The *New SART Service Request* window closes and the user returns to the main SART window. If necessary, scroll back to *Section 8* to continue working in that section.

Only one service can be entered at a time. A new entry **must** be created for each service. To add more services, click the **+** icon to open another *New SART Service Request* window, enter the applicable information, click *Save & Close*, and repeat as necessary to add all applicable services.

An additional sub-section or fields within *Section 8* displays when authorization is being requested for Pathway to Employment, Self-Direction with Budget Authority, Supplemental Day Habilitation, and Supported Employment services. Required fields are marked with a red asterisk (*). If a required field is not completed, an error message will display.



If the user needs to delete a service request, follow the same instructions provided [above](#) in *Section 7* for how to delete a service request row.

Section 9 – SART Service Request Summary

Section 9 will display a summary grid of service requests entered in Section 7 – Current OPWDD Services Authorized and Receiving and Section 8 – New OPWDD Services Requested above. All service requests entered may or may not display initially. If all service requests do not display, click the, *Click here to reload the Summary Grid* link.

Section 9: SART Service Request Summary					
	Service Type	Annual Service Units Requested	Type of Service Request	Provider(s)	Justification
1	Community Habilitation - Agency Supported Self-Directed with MOU	125	Change Provider; Increase Service Amount	0261 - CENTRAL NEW YORK DDSO	

[Click here to reload the Summary Grid](#)

The grid will reload with all service requests.

Section 9: SART Service Request Summary					
	Service Type	Annual Service Units Requested	Type of Service Request	Provider(s)	Justification
1	Supported Employment (SEMP) - Direct Provider Purchased	N/A	New	Not known at this time	Example
2	Community Habilitation - Agency Supported Self-Directed with MOU	125	Change Provider; Increase Service Amount	0261 - CENTRAL NEW YORK DDSO	

[Click here to reload the Summary Grid](#)

Section 10 – Care Manager’s Signature

After a Care Manager has reviewed the entire SART, they **must** check off the attestation box and then click the *Submit Form* button. **Save & Close does not** submit the SART. Rather, the SART will Save and the form closes.

SAVE ~~SAVE & CLOSE~~ SAVE & NEW + NEW DELETE EMAIL A LINK WORD TEMPLATES RUN REPORT **SUBMIT FORM** ...

SART - SERVICE AMENDMENT REQUEST TOOL : INFORMATION
SART for NAGEL,SHAYDAUIA S

Section 10: Care Manager's Signature

Required - Please attest by checking this box that a person-centered conversation with the individual about their needs has occurred and that you are requesting a service that the individual wants, that promotes community integration and is being provided in the least restrictive environment.

Care Manager Electronic Signature Submitted On

Submitting a SART

Care Managers **must** click *Submit Form* after checking the attestation box on the main SART window to apply their electronic signature, signature date, and submission date onto the form. After *Submit Form* is clicked, the *Signature Form* window displays. The user **must** check *By checking this box you agree to the above*, then add their CHOICES password, and click *Submit*.

The SART *Status Reason* changes to *Submitted*, and the SART main window closes.

Deleting a SART

If an *Active* SART has a *Status Reason* of *Saved* and it has never been *Submitted*, the SART can be deleted if no longer needed. To delete a SART, click *Delete*.

A dialog box will display to confirm if the user would like to delete the SART. Click *Delete* to delete the SART or *Cancel* if deletion is not necessary.

The SART will no longer display in any System Views or on the person's *SART – Service Amendment Request Tools* Form Section of their CHOICES record.

INDIVIDUAL: INFORMATION
 GADZO,JONEE

SART - Service Amendment Request Tool Associa...

+ ADD NEW SART - SERVIC... | CHART PANE | RUN REPORT | EXPORT SART - SERVICE ...

Name	Agency/CCO	Status Reason	Created On	Modified On	Modified By
<p>No SART - Service Amendment Request Tools found for this Individual. Select Add (+).</p>					

Reviewing or Editing another User's SART

If the SART has the *Status Reason* of *Saved*, it can be reviewed or edited by CCO staff other than the original user whose information auto populated onto the SART. The other CCO staff can open a person's SART from person's *SART – Service Amendment Request Tools* Form Section within their CHOICES record. See instructions above in [Creating a SART](#) for how to navigate to a person's *SART – Service Amendment Request Tools* Form Section.

To open the person's SART, click the hyperlink of the SART to be reviewed or edited.

SART - Service Amendment Request Tool Associated...

+ ADD NEW SART - SERVIC... | CHART PANE | RUN REPORT | EXPORT SART - SERVICE ...

<input type="checkbox"/>	Name	Agency/CCO	Status Reaso...	Created On	Modified On	Modified By
SART for COWEN,KEEWAN	LIFEPLAN CCO NY, LLC	Saved	12/28/2023 8:48 AM	1/17/2024 9:37 AM	chtrain15 chtrain15	
SART for COWEN,KEEWAN	LIFEPLAN CCO NY, LLC	Completed	12/5/2023 9:18 AM	12/5/2023 9:29 AM	cadmin-uat System	

Once the new CCO staff has opened the desired SART, a dialog box displays asking the user if they want their information to be added onto the person's SART. The user will click *OK* if they want their information to be added and if they want to edit the SART. The user will click *Cancel* if they do not want their information added and only want to view the information.

Confirmation Dialog

You are not the selected Care Manager. Do you want to change it to yourself?



Subsequent SARTs

For subsequent SARTs, information that was manually entered at some point either on an initial or previous SART for *Section 1- Legal Guardian Information*, *Section 2 – Care Manager’s Information*, *Section 4 – Education Information*, and *Section 5 – Non-OPWDD Services and Natural Supports* will auto populate the information previously entered by a CCO user from the most recent *Completed* SART on the person’s record. The information auto populated will be editable. CCO staff **must** review the information auto populated onto the subsequent SART and update this information accordingly.

Differences between Initial and Subsequent SARTs for Section 7

For *Section 7 – OPWDD Services Authorized and Receiving* of subsequent SARTs, the *Service Type* and the *Current Annual Number of Service Units Authorized* fields will auto populate from the person’s most recent *Completed* SART. These two auto populated fields **are not** editable. Users **must** continue to enter the *Current Annual Number of Service Units Receiving*, *Current Provider Name*, and *Change(s) to Service*.

Necessary changes to a *Service Type* **must** be entered in the applicable field(s). A *Service Type* row **cannot** be deleted on a subsequent SART. Rather, the user **must** request *Discontinue Service* in the *Change(s) to Service* field for the *Service Type*.

If a *Service Type* is missing from *Section 7* after an initial SART has been completed, the user **must** enter the *Service Type* as a net new service request in *Section 8 – New OPWDD Services Requested* as the SART does not recognize the *Service Type* as a currently authorized service in *Section 7*.

Limit of One Active SART

A person can only have **one** *Active* SART within the CHOICES system at any given time. If the person has a *Saved*, *Submitted*, *Assigned*, or *Returned* SART on record, another SART **cannot** be created. In this example below, another SART cannot be created as the person already has an *Active* SART with a *Status Reason* of *Assigned*.

BALLERO,HAASAN ☰

SART - Service Amendment Request Tool Associated Vi... ▾

+ ADD NEW SART - SERVIC... | CHART PANE ▾ | RUN REPORT ▾ | EXPORT SART - SERVICE ... ▾

<input type="checkbox"/>	Name	Agency/CCO	Status Reason	Created On	Modified On ↓	Modified By
<input type="checkbox"/>	SART for BALLERO,HAASAN	LIFEPLAN CCO NY, LLC	Assigned	11/24/2023 11:41 AM	1/11/2024 5:13 PM	SYSTEM
<input type="checkbox"/>	SART for BALLERO,HAASAN	LIFEPLAN CCO NY, LLC	Completed	11/13/2023 12:53 PM	11/15/2023 12:29 PM	cadmin-uat System
<input type="checkbox"/>	SART for BALLERO,HAASAN	LIFEPLAN CCO NY, LLC	Withdrawn	10/24/2023 2:31 PM	11/13/2023 12:52 PM	cadmin-uat System



DDRO Review and Completion

DDRO Assignment

After a SART has been *Submitted*, it is *Assigned* to DDRO staff. The CCO user who *Submitted* the SART will receive an automatic email message with the name and DDRO Region # of the *DDRO Staff Assigned*.

SART for BALLERO,HAASAN

DDRO Review and NOD Information

Section 11: DDRO Review	
DDRO Staff Assigned Lauren Porter	DDRO Staff Assigning SART Lauren Porter
DDRO Staff Assigned On 12/6/2023	

Section 11 – DDRO Review

After the DDRO user has completed work in *Section 12 – Assessment Verifications* and if/when they are satisfied with the information submitted or re-submitted on the SART, they select the *Authorization Decision* and enter the *Annual Service Units Authorized* (if required) for each service request entered by the CCO user in *Section 7 – Current OPWDD Services Authorized and Receiving* and *Section 8 – New OPWDD Services Requested* in *Section 11 – DDRO Review*.

Section 11: DDRO Review	
DDRO Staff Assigned Srujana Puttreddy	DDRO Staff Assigning SART Srujana Puttreddy
DDRO Staff Assigned On 10/24/2023	

SART Service Requests (SART Form)				
Service Type ↑	Authorization Decision ↑	Annual Service Units Authorized	DDRO Reviewer	DDRO Review Date
Community Habilitation - Direct Provider Pur...	Authorized	100.00	Srujana Puttreddy	10/26/2023
Self-Direction with Budget Authority	No Change		Srujana Puttreddy	10/26/2023
Day Habilitation Site Based	Terminated	0.00	Srujana Puttreddy	10/26/2023

The DDRO will *Return* a SART if they are unable to complete their work within *Section 11* without additional information. See [Returned SART](#) below for further instructions.

The *Authorization Decision* options the DDRO user will select from if they agree with the service request as submitted or are issuing a different decision as a result of the DDRO review process are:

- For *Section 7 – Current OPWDD Services Authorized and Receiving* service requests:



- *Increased* – DDRO has authorized an increase in *Annual Service Units Authorized* for the *Service Type* from the amount the person was previously authorized for (i.e., number entered by CCO user in *Current Annual Number of Service Units Authorized* field). DDRO user can enter an amount in *Annual Service Units Authorized* field that is less than the amount the CCO user requested in the *Annual Number of Service Units Requested* field.
- *No Change* – DDRO has re-authorized the same amount of *Annual Service Units Authorized* that the person was previously authorized for (i.e., number entered by CCO user in *Current Annual Number of Service Units Authorized* field). Selected when person has requested to only *Add Provider* or *Change Provider* as these requests do not impact the number of *Annual Service Units Authorized*.
- *Reduced* – DDRO has reduced the amount of *Annual Service Units Authorized* for the *Service Type* than the amount the person was previously authorized for (i.e., number entered by CCO user in *Current Annual Number of Service Units Authorized* field).
- *Terminated* – DDRO has terminated the person’s authorization for the *Service Type*. *Annual Service Units Authorized* displays as Zero (0).

Service Type	Authorization Decision	Annual Service Units Authorized
Community Habilitation - Direct Provider Purchased	No Change	100.00
Day Habilitation Site Based	Increased	75.00
Prevocational Services – Site Based	Reduced	50.00
Family Education and Training (FET)	Terminated	0.00

- For *Section 8 – New OPWDD Services Requested* service requests:
 - *Authorized* – DDRO has authorized *Service Type* for amount entered in *Annual Service Units Authorized*. DDRO user can enter an amount in *Annual Service Units Authorized* field that is less than the amount the CCO user requested in the *Annual Number of Service Units Requested* field.
 - *Not Authorized* – DDRO has denied *Service Type* requested. *Annual Service Units Authorized* displays as Zero (0).

Service Type	Authorization Decision	Annual Service Units Authorized
Pathway to Employment	Authorized	278.00
Day Habilitation Site Based - Supplemental	Not Authorized	0.00

The *DDRO Reviewer* and *DDRO Review Date* will display. Dates that were entered on the Service Authorization Notice of Decision (NOD) sent to the CCO display in the *NOD Information* section as applicable.



Section 12 – Assessment Verifications

DDRO users will begin their work in *Section 12 – Assessment Verifications*. The person’s Developmental Disabilities Profile 2 (DDP2) and CAS/CANS information is imported onto the SART from their TABS/CHOICES record by the DDRO user. Then, the DDRO user will select the applicable option in the *DDP2 Verification* and *CAS/CANS Verification* fields before they scroll up to *Section 11 – DDRO Review* to continue their work.

▸ [Assessment Verifications](#)

Section 12: Assessment Verifications	
Section 12a: DDP2 Verification	
DDP2 Adaptive	DDP2 Completion Date
DDP2 Behavioral	DDP2 Verification DDP2 is not required
DDP2 Health	
DDP2 ISPM Score	DDP2 Scores last retrieved on date
Section 12b: CAS/CANS Verification	
CAS Finalized Date	CANS Finalized Date
CAS/CANS Verification CAS/CANS not required: Other Reason	CAS Verification Other Reason test
CAS/CANS info last retrieved date	

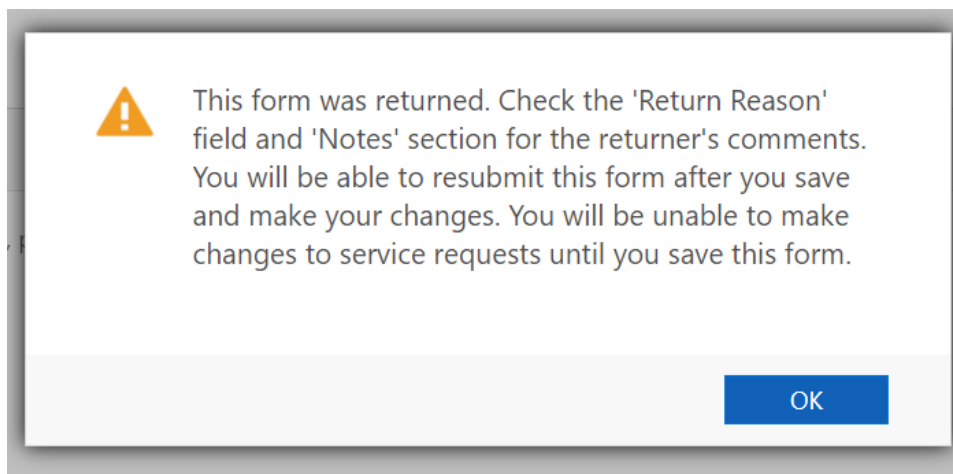
Completed SART

After the DDRO user has reviewed their work in *Section 11 – DDRO* and *Section 12 – Assessment Verifications* they will *Complete* the SART. Then the completion date will display, and the form will become *Inactive*. A *Completed* SART cannot be re-activated for further editing. Any edits needed once a SART has been *Completed* requires the creation and submission of a new SART.

Section 11: DDRO Review					
DDRO Staff Assigned Srujana Puttreddy		DDRO Staff Assigning SART Srujana Puttreddy			
DDRO Staff Assigned On 10/24/2023					
SART Service Requests (SART Form)					
Service Type ↑	Authorization Decision ↑	Annual Service Units Authorized	DDRO Reviewer	DDRO Review Date	
Community Habilitation - Direct Provider Pur...	Authorized	100.00	Srujana Puttreddy	10/26/2023	
Self-Direction with Budget Authority	No Change		Srujana Puttreddy	10/26/2023	
Day Habilitation Site Based	Terminated	0.00	Srujana Puttreddy	10/26/2023	
NOD Information					
NOD Sent Date 10/26/2023		Effective Date - Authorized Services 10/26/2023			
Effective Date - Reduced Services -----		Effective Date - Terminated Services 11/5/2023			
SART Completion					
Date SART Completed 10/26/2023					

Returned SART

The DDRO can *Return* a SART. Navigate to the person's *Returned* SART. Click the link of the *Returned* SART to open it. Once the *Returned* SART is opened a message will display, read the message then click OK.



Scroll down to the *Return or Withdraw Form* section. The *Return Reason*, *Return Date*, who it was *Returned By*, and *Return Count* (number of times it has been *Returned*) displays.



Return or Withdraw Form

Return Form	
Return Reason Incomplete or inaccurate information	Return Date 10/18/2023
Returned By Patricia Walhwasserman	Return Count 1

Go to the *Notes* section to check if the DDRO entered any information about the *Returned SART*.

Notes

ACTIVITIES	NOTES
	<p>Enter a note</p> <p>Testing adding a note prior to returning a SART. SYSTEM - 10/25/2023 8:34 AM</p> <p>Return to Submitter Comments Further info needed- this is a test; SYSTEM - 10/25/2023 8:34 AM</p>

CCO users can enter text in the *Notes* section by clicking inside the field. Enter text then, click Done. *Attach* button has no functionality. Please ignore this button. *Notes* are visible to all users who have access to the particular SART.

Notes

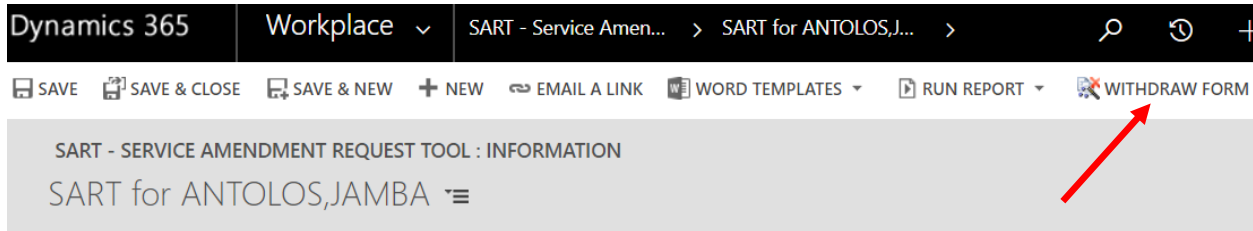
ACTIVITIES	NOTES
	<p>Title</p> <p>Testing CCO user adding a note before re-submitting a Returned SART</p> <p>Attach Done</p>

Once the user has begun to work on *Returned SART*, click Save. Clicking *Save* will change the *Status Reason* to *Saved*. The *Saved Status Reason* indicates to all users that the *Returned SART* is being worked on. The CCO user **must** *Submit* the SART to the DDRO after it has been *Returned*. Follow instructions provided above in [Section 10 – Care Manager’s Signature](#) and [Submitting a SART](#) to sign and

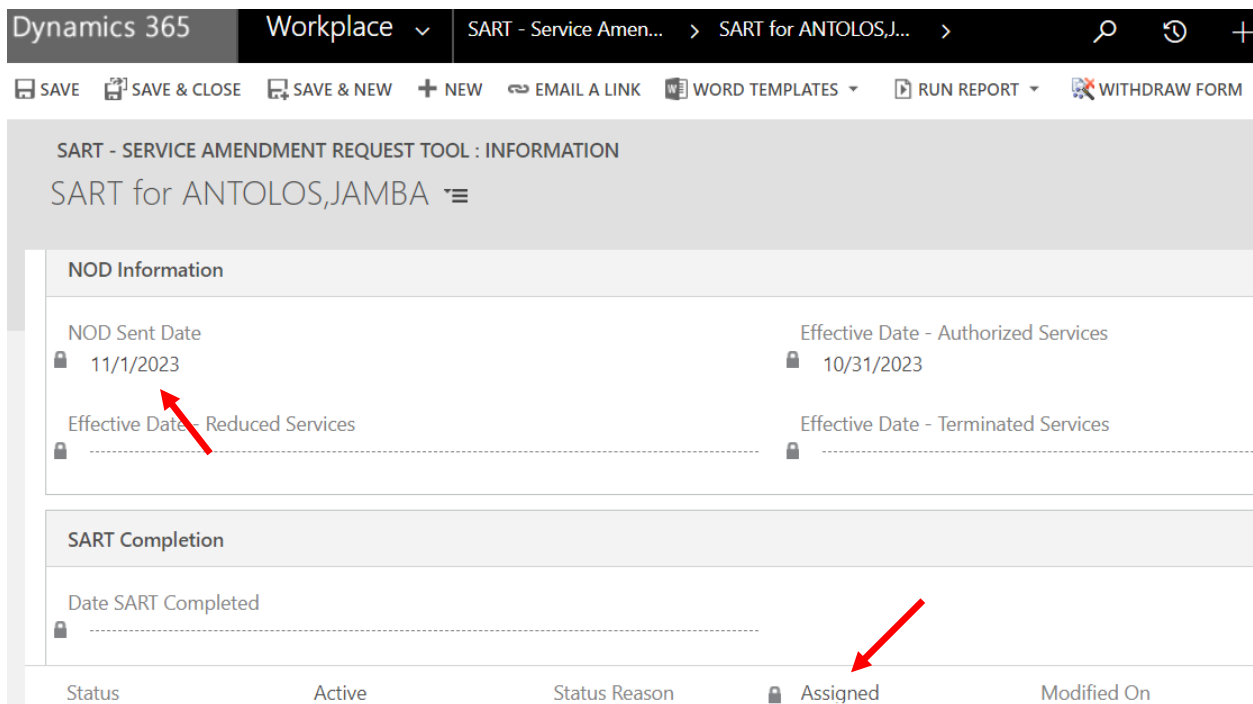
Submit the SART. The form closes and is given a *Status Reason* of *Assigned* as it is sent back to the DDRO.

Withdrawn SART

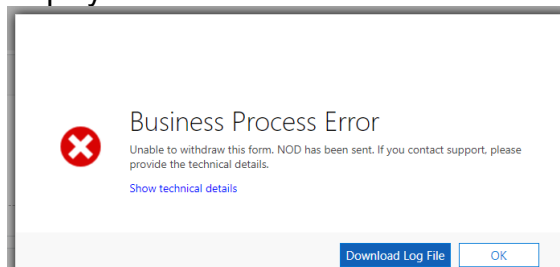
CCO users can *Withdraw* a SART after it has been *Submitted*. Clicking *Withdraw Form* withdraws the SART and closes the SART window.



The *Status Reason* changes to *Withdrawn* and the *Status* changes to *Inactive*. A *Withdrawn* SART cannot be re-activated for further editing or submission. The CCO user **must** create and submit a new SART. A SART cannot be *Withdrawn* once a DDRO user has entered a date in the *NOD Sent Date* field even if the DDRO has not *Completed* the SART yet (i.e., *Status Reason* is *Assigned*).



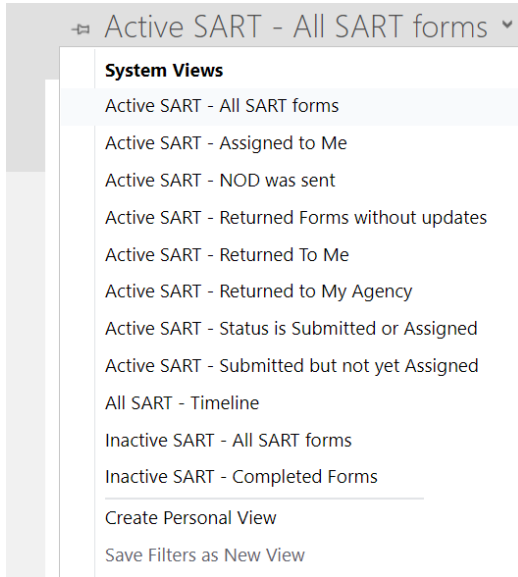
If a CCO user attempts to *Withdraw* a SART with an *NOD Sent Date*, an error displays.



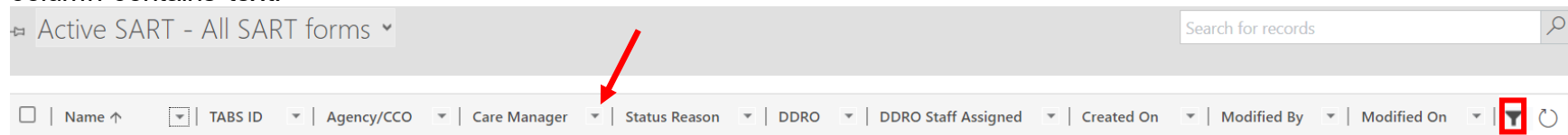


SART System Views – Monitoring and Tracking SART Activity

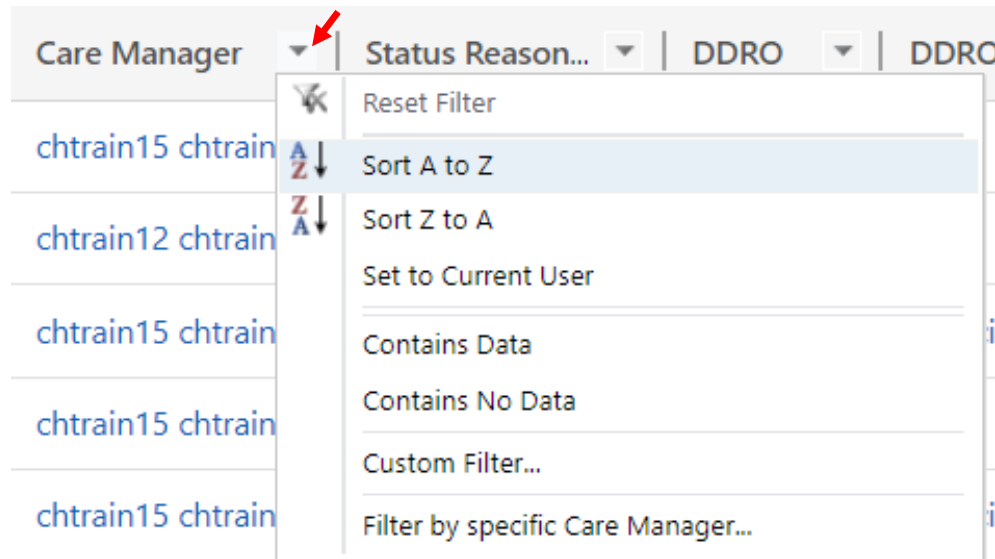
This is a list of all the System Views available to CCO staff who have access to the SART.



To filter a System View, click the filter icon (funnel). Down arrows then display next to the title of the column. Clicking the title of the column sorts the column from oldest to newest if the column contains dates or alphabetically from A to Z if the column contains text.



Click the down arrow. A menu of filter options to select from displays. To filter the Care Manager column to the current user logged in, click *Set to Current User*. A filter can be applied to another user or multiple users by clicking *Filter to specific Care Manager...*



Once *Filter to specific Care Manager...* has been clicked, the *Care Manager Look Up Records* window displays. The user can type the full name or partial name of the user(s) in the *Search* field or scroll down using the side bar to find the user(s) they are looking to filter the column to. Use of the side bar is not recommended given the large volume of Care Manager users available to select from within a CCO. Once the desired Care Manager(s) have been found, check the box to the right of the Care Manager's *Full Name*. Click *Select* to add the Care Manager(s) to the *Selected records* box. The selected Care Managers display in the *Selected records* box.



Look Up Records

Enter your search criteria.

Look for

Look in

Search

Look Up Records

Enter your search criteria.

Look for

Look in

Search

<input type="checkbox"/>	Full Name ↑	Agency	
<input type="checkbox"/>	chtrain13 chtrain13	LIFEPLAN CC...	6€
<input checked="" type="checkbox"/>	chtrain14 chtrain14	LIFEPLAN CC...	6€
<input checked="" type="checkbox"/>	chtrain15 chtrain15	LIFEPLAN CC...	6€

1 - 6 of 6 (2 selected) Page 1

Selected records:

chtrain14 chtrain14 chtrain15 chtrain15

<input type="checkbox"/>	Full Name ↑	Agency	
<input type="checkbox"/>	BERNARD M. FINESON SYSTEM USER	0230 - BERN...	BE
<input type="checkbox"/>	BROOKLYN DDSO SYSTEM USER		BF
<input type="checkbox"/>	BROOME DDSO SYSTEM USER		BF

1 - 16 of 16 (0 selected) Page 1

Selected records:

BERNARD M. FINESON SYSTEM USER

BROOKLYN DDSO SYSTEM USER

To remove a Care Manager displayed in the *Selected records* box, click the Care Manager's name in the *Selected records* box to highlight it in blue, then click *Remove*. Click *Add* to apply the filter. The user returns to the System View with SARTs filtered to the Care Manager(s) selected displayed.

Active SART - All SART forms

Search for records

<input type="checkbox"/>	Name ↑	TABS ID	Agency/CCO...	Care Manager	Status Reason...	DDRO	DDRO Staff Assigned	Created On	Modified By	Modified On
	SART for DAFFERN,BUD	331673	LIFEPLAN CCO N...	chtrain14 chtrain14	Saved	Capital Dis...		10/24/2023 10:2...	chtrain14 chtrain...	10/25/2023 1:59 P...
	SART for DIPROJETTO,SHAQUIL	95958	LIFEPLAN CCO N...	chtrain15 chtrain15	Assigned	Sunmount,...	Jerry Brennan	11/15/2023 1:23 ...	Lauren Porter	1/2/2024 2:09 PM



To remove the filter, click *Reset Filter* in the filter menu (shown [above](#)).

Additional information on Views can be found in the Navigating CHOICES User Guide.

Active SART – All SART Forms

Displays all *Assigned, Saved, Submitted, or Returned* SARTs created by all staff from the user's CCO display.

Active SART - All SART forms

| Name | TABS ID | Agency/CCO | Care Manager | Status Reason | DDRO | DDRO Staff Assigned | Created On | Modified By | Modified On

Active SART – Assigned to Me

All *Assigned, Saved, Submitted, or Returned* SARTs created by the user displays. *Assigned* SARTs include SARTs that have been *Submitted* after being *Returned*. Recommended default System View to display for Care Manager users. System View default view can be set-up by clicking the pin next to the name of the View.

Active SART - Assigned to Me

| Name | TABS ID | Agency/CC... | Care Manager | DDRO | DDRO Staff Assigned | Modified On | Status Reason...

Active SART – NOD was Sent

All *Assigned* SARTs created by all staff from the user's CCO that have an NOD Sent Date displays. The SARTs displayed **cannot** be *Withdrawn* by a CCO user.

Active SART - NOD was sent

| Name | TABS ID | Agency/CCO | Care Manager | DDRO | DDRO Staff Assigned | NOD Sent Date | Modified By | Modified On



Active SART – Returned Forms without Updates

All *Returned* SARTs created by all staff from the user’s CCO displays. These SARTs have not been worked on since being *Returned*.

Active SART - Returned Forms without updates Search for records

Name	TABS ID	Agency/CCO	Care Manager	DDRO	Modified By	Modified On	Return Count	Return Date	Return Reason	Returned by
------	---------	------------	--------------	------	-------------	-------------	--------------	-------------	---------------	-------------

Active SART – Returned to Me

All *Saved* and *Returned* SARTs created by the user displays. The SARTs displayed include those that have been updated (*Saved*) and have not been updated (*Returned*) since they were *Returned* by a DDRO user.

Active SART - Returned To Me Search for records

Name	TABS ID	Created By	Created On	Modified By	Modified On	Return Date	Return Reason	Status Reason
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Active SART – Returned to My Agency

All *Saved* and *Returned* SARTs created by all staff from the user’s CCO displays. The SARTs displayed include those that have been updated (*Saved*) and have not been updated (*Returned*) since they were *Returned* by a DDRO user.

Active SART - Returned to My Agency Search for records

Name	TABS ID	DDRO	Returned by	Return Date	Return Reason	Status Reason	Created By	Created On	Modified On
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Active SART – Status is Submitted or Assigned

All *Assigned* and *Submitted* SARTs created by all staff from the user’s CCO displays.

Active SART - Status is Submitted or Assigned Search for records

Name	TABS ID	Status Reason	Agency/CCO	Care Manager	DDRO	Submitted On	DDRO Staff Assigned	Modified By	Modified On
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Active SART – Submitted but not yet Assigned

All *Submitted* SARTs created by all staff from the user’s CCO displays.

☞ Active SART - Submitted but not yet Assigned ▾

<input type="checkbox"/>	Name ↑	TABS ID	Submitted On ↑	Agency/CCO	Care Manager	DDRO	Modified By	Modified On
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All SART – Timeline

Timeline of actions for all *Active* and *Inactive* SARTs created by all staff from the user’s CCO displays.

☞ All SART - Timeline ▾

<input type="checkbox"/>	Name	TABS ID	Agency/CCO	Care Manager	DDRO	Status ↑	Status Reason	Originally Submitted On	DDRO Staff Assigned	DDRO Staff Assigned On	Return Date	Return Count	Submitted On	NOD Sent Date	Completed on Date ↓
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Inactive SART – All SART Forms

All *Withdrawn* and *Completed* SARTs created by all staff from the user’s CCO displays.

☞ Inactive SART - All SART forms ▾

<input type="checkbox"/>	Name ↑	TABS ID	Agency/CCO	Care Manager	DDRO	DDRO Staff Assigned	Status Reason	Created On	Modified On
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Inactive SART – Completed Forms

All *Completed* SARTs created by all staff from the user’s CCO displays.

☞ Inactive SART - Completed Forms ▾

<input type="checkbox"/>	Name	TABS ID	Agency/CCO	Care Manager	DDRO	DDRO Staff Assigned ↑	Created On	NOD Sent Date	Completed on Date
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