

Start with one useful request

New York intake route

OPWDD Front Door and CCO/Service Access Agency

1. Begin with the deciding system

Call OPWDD at 866-946-9733 and ask for Front Door serving the home county. Ask a CCO or Service Access Agency to help assemble the requested eligibility packet. Track packet completeness and eligibility separately from Medicaid, authorization and service availability.

2. Use the person's actual needs

Describe one chosen outcome and the support currently missing. Use the state guide to distinguish application, required evidence, eligibility and service authorization. A school plan, diagnosis or referral does not complete every agency process.

3. Send, save and confirm

Use Contact record, Service request record and Submission and receipt record. Ask for the exact missing evidence, who obtains it and the next deciding worker. Keep the application and delivery proof together.

4. Assign the next action

On Our next 30 days, name who acts next and a chosen check-in date. Record formal notice deadlines separately. An informal follow-up does not file an appeal.

Official state starting route

<https://opwdd.ny.gov/get-started/front-door>

Worked example: New York

Fictional situation

Alex, age 19, wants help planning supports and chooses a trusted supporter to help. The next three pages use actual workbook layouts. All responses and follow-up dates are fictional examples, not agency promises or legal deadlines.

The actual state workflow

Call OPWDD at 866-946-9733 and ask for Front Door serving the home county. Ask a CCO or Service Access Agency to help assemble the requested eligibility packet. Track packet completeness and eligibility separately from Medicaid, authorization and service availability.

What to copy from the examples

Record the deciding office and exact request. Separate receipt from eligibility, financial review and a service start. Assign missing-evidence work to a named person and retain proof of submission. Replace fictional responses with the actual office's instructions.

Keep your own application and authority

These are recordkeeping examples, not agency applications, consent forms or appeals. Confirm adult consent/information-sharing authority with the person and office; a parent is not automatically the representative for every adult decision.

Save a working copy

Open the fillable workbook in a form-capable reader, save a separate copy, close and reopen it to check entries. Keep completed family records private. These three example pages are intentionally static; the blank workbook remains interactive.

Official evidence

<https://opwdd.ny.gov/get-started/front-door>

Use the companion state guide/source record for the original research scope and program-specific limits. No individual eligibility, opening or staffed start was confirmed.

Contact record

Use a fresh copy for each call, email or meeting.

Person or program

Alex (fictional)

Date and record ID

Monday - example

Agency, contact name, role, phone, and secure reply method

OPWDD Front Door and CCO/Service Access Agency. Ask for worker name and secure reply method.

Reason for contact and the exact request

Call OPWDD at 866-946-9733 and ask for Front Door serving the home county.

Response, reference number, and documents requested

Fictional response: receipt acknowledged; a requested record is missing. No eligibility, funding or service start is confirmed.

Next action, responsible person, and follow-up date

Alex/supporter obtains the requested evidence and saves delivery proof. Friday is a chosen check-in.

FICTIONAL EXAMPLE - Chosen follow-up dates are not agency or legal deadlines.

Service request record

Use one copy per program. A referral, completed application and authorization are separate stages.

Person or program

Alex (fictional)

Date and record ID

State intake request 01

Program, service requested, and reason

Call OPWDD at 866-946-9733 and ask for Front Door serving the home county.

Referral and application dates, completeness status, and receipt

Receipt tracked separately from eligibility, financial review, funding and staffed start.

Decision, authorized support, service dates, and provider

Ask the deciding office which evidence is missing and what existing reports it will accept.

Remaining step, responsible person, deadline, and interim support

Alex/supporter submits requested evidence securely and confirms the next deciding worker.
Chosen follow-up: Friday.

FICTIONAL EXAMPLE - Chosen follow-up dates are not agency or legal deadlines.

Our next 30 days

Choose no more than three active priorities at a time.

Person or program

Alex (fictional)

Date and record ID

Next 30 days - example

Priority one: action, responsible person, due date, and completion evidence

Alex/supporter: identify the serving OPWDD Front Door and CCO/Service Access Agency.
Target: Monday. Evidence: current instructions saved.

Priority two: action, responsible person, due date, and completion evidence

Alex/supporter: gather only the records requested and submit securely. Target: Thursday.
Evidence: dated receipt.

Priority three: action, responsible person, due date, and completion evidence

Alex/supporter: confirm completeness and the next deciding worker. Chosen check-in: Friday.
Evidence: written status.

Weekly review dates and next steps if an action stalls

Review Friday. If denied, retain the notice and use its formal filing route; an informal call does not file an appeal.

FICTIONAL EXAMPLE - Chosen follow-up dates are not agency or legal deadlines.