

Mike McCormick
Authorized signature

Number: APD-AR-15-039
Issue date: 7/15/2015

Topic: Long Term Care

Due date: N/A

Subject: Oregon ACCESS Copy and Create Management Report

Applies to (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> Health Services |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services(ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children’s Intensive In Home Services |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> ODDS Children’s Residential Services | <input type="checkbox"/> Other (<i>please specify</i>): |
| <input type="checkbox"/> Child Welfare Programs | |

Message: Effective 7/20/15 a new report will be available to monitor assessments that utilize the copy and create feature, and to confirm that case managers are making updates to the assessments that reflect the current needs of the individual.

- Managers are required to run the report quarterly for all case managers they supervise.

The title of the report is ‘Copy and Create Management Report’ and can be found on the Print Reports screen accessed through the Reports button on the Oregon ACCESS Main Menu.

- Tier 1 users (case managers) will only be able to view and print their own report for the branch that they are logged into.
- Tier 2 users (lead workers and managers) will be able to view and print the report listing the names of the clients for workers’ caseloads from the list of selected workers and assigned to the branch that they are logged into.

The ‘Report Start Date’ will default to the first of the previous month and the ‘Report End Date’ will default to the last day of the current month. Although both dates are editable, the ‘Report Start Date’ cannot be changed to a date prior to January 2015 and the ‘Report End Date’ cannot be beyond the current month.

The following are screen prints of how to preview or print the report:

Field/stakeholder review: Yes No

If yes, reviewed by: APD Operations

If you have any questions about this action request, contact:

Contact(s):	Christine Maciel		
Phone:	(503) 945-5690	Fax:	(503) 947-4245
Email:	Christine.C.Maciel@state.or.us		