

Select originating cluster

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Authorized Signature

Number: SPD-IM-04-078
Issue Date: 08/20/04

Topic: Other

Subject: Oregon ACCESS Release 19.9

Applies to (check all that apply):

- | | |
|---|---|
| <input type="checkbox"/> All DHS employees
<input checked="" type="checkbox"/> Area Agencies on Aging
<input type="checkbox"/> Children, Adults and Families
<input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> County Mental Health Directors
<input type="checkbox"/> Health Services
<input checked="" type="checkbox"/> Seniors and People with Disabilities
<input type="checkbox"/> Other (please specify): |
|---|---|

Message:

Oregon ACCESS will be updated at 5:00 PM on Friday, August 27, 2004.

This release will impact areas of ACCESS that involve employment, including the Employed Persons with Disabilities (EPD) Program, the Employment Initiative (EI) Program, CA/PS and the employment screens. Major changes have been made on the employment screens and to EI data. Minor changes were made to the EPD tab and a new screen was added to CA/PS, which captures attendant care when a client is working. No other changes were made to CA/PS. Please refer to the attachment for more detailed information on the changes.

If you need additional information on these changes, there are still openings in the August 23rd and August 26th NetLink sessions. You can register on the DHS training website: https://dhstraining.hr.state.or.us/Training/FMPRO?-db=Sessions.fp5&-format=CoursesAvailConf.htm&-lay=main&CourseNbr=3101&-sortfield=date&Indexed_available=yes&-find.

If you have any questions about this information, contact:

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EMPLOYMENT

The employment tab on ACCESS has changed to allow for better tracking and processing. With the new functionalities, we will be able to capture employment history, including changes within a company (employment record). Data on the two Employment sub-tabs (**General Info** and **Job Detail**) have been rearranged and relabeled.

- **General Info Tab**

Oregon Access [Office : Disability Service Office (2417) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for ANDREA I BOCELLI (Case Branch : Disability Service Office)

Income / Empl Resources Property Prop Trans Shelt Cost Funeral Life/Bur Ins. EPD

Income Employment

Employer List

	Person	Employer Name	Final Pay	Monthly Gross	Final Work Date	Verified
1	BOCELLI, ANDR	SELF - Opera Singer	.00	3,850.00	03/22/2004	No
2	BOCELLI, ANDR	Sabarros	.00	967.50	00/00/0000	No

Employment Detail

General Info Job Detail

Empl. Status: **Employed**

Start Date: 01/23/1998

Job End Reason:

Employer: SELF - Opera Singer

Address:

Line 2:

City State ZIP:

Tele Nbr: () - Ext:

Final

Work Date: 03/22/2004

Pay Date: 00/00/0000 Pay Amt: .00

OHP Only

1st Prior month's income: .00

2nd Prior month's income: .00

Employee

Employee Name: BOCELLI, ANDREA I Verified:

Empl Status is the person's employment status. Employed, Job Loss/Quit and Strike remain valid choices in the drop down. A new choice of Volunteer has been added.

Job End Reason has been moved from the **Job Details** sub-tab to the **General Info** sub-tab. The functionality remains the same and the same drop down options are available.

Other changes to this screen:

- **Pay** section was moved to the **Job Details** sub-tab.
 - **OHP Only** Section was moved to the right-hand corner of the sub-tab.
 - **Job End Reason** was moved to the **Final Pay** section.
 - **Reason for Leaving** field was moved.
- **Job Detail Tab**

This tab has been renamed **Job Detail** (was **Job Info**).

The screenshot displays the Oregon Access software interface. The main window title is "Oregon Access [Office : Disability Service Office (2417) Profile Type :- Branch]". The application menu includes File, Edit, Select, Status, Transfer, View, Mainframe, Windows, and Help. The current case is "Case for ANDREA I BOCELLI (Case Branch : Disability Service Office)". The navigation tabs include Incm / Empl, Resources, Property, Prop Trans, Shelt Cost, Funeral, Life/Bur Ins., and EPD. The "Employment" sub-tab is active, showing an "Employer List" table and an "Employment Detail" form.

Person	Employer Name	Final Pay	Monthly Gross	Final Work Date	Verified
1 BOCELLI, ANDR	SELF - Opera Singer	.00	3,850.00	07/28/2004	No
2 BOCELLI, ANDR	Sabarros	.00	967.50	00/00/0000	No

Employment Detail

General Info | **Job Detail**

Job Type: Professional & Technical
Job Title:
Job Duties:

EI
Empl Type: FT without Benefits
Work Activity: Self Employment
Industry Type: Services
Ins Type: None

Pay
Pay Type: Hourly Salaried
Frequency: Monthly (x 1)
Gross Amt: 3,850.00 Net Amt: 3,425.00
Hrly. Wage: .00 Hrs / Week: .0
 Is income exempt from Food Stamp Calc?

Job Chg Rson: Career advancement within the
Job Chg Date: 05/01/2004

New Detail View Summary

Employee
Employee Name: BOCELLI, ANDREA I Verified:

Empl Type is a new field under the EI section. This drop down list was created to track the type of benefits a person receives with their employment. Valid choices are: Contract, FT with Benefits, FT without Benefits, PT with benefits, PT without benefits, Temp Position FT or Temp Position Hourly.

Pay Details and **Job Chg Rson** have been moved to this tab in order to accommodate a new feature, history tracking of employment records.

Two new buttons have been added to this screen: **New Detail** and **View Summary**.

To add details for a new job, select a **Job Chg Rson** and **Date**. The **Job Chg Date** will autofill today's date. (This date is editable, if needed.) Then select the **New Detail** button, the current detail will be moved to history and the screen will be cleared. Enter the new employment detail information.

NOTE: Be careful when clearing the screen. If you have not saved the record, the clear function will clear data of the **Job Detail** and **General Info** sub-tabs.

When **View Summary** is selected a pop-up data window will display historical job details for the associated employment record. The records will display in chronological order. If no employment job history exists, the **View Summary** button will be disabled.

EMPLOYED PERSONS WITH DISABILITIES (EPD)

The EPD tab on ACCESS has been changed and a new Client Contribution sub-tab has been added to allow for better tracking and processing.

- General Info Tab

Oregon Access [Office : Disability Service Office (2417) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for ANDREA I BOCELLI (Case Branch : Disability Service Office)

○ Incm/Empl ○ Resources ○ Property Prop Trans Shelt Cost Funeral Life/Bur Ins. ○ EPD

List

Last Name	First Name	Start Date	End Date	Verified
BOCELLI	ANDREA	01/01/2004		No

Detail

General Info | EIE | Approved Account | Client Contribution

EPD

Start Date: 01/01/2004 Elig Rvw.Date: 06/2005

End Date: 00/00/0000 End Reason: [Dropdown]

What challenges do you face in increasing your earned income?

Add

Remove

Verified

EPD Client Name : BOCELLI , ANDREA I

Start Date is an existing field. Data in this field should be the original date the EPD eligibility started. This field should only be changed if there was a break in EPD service and a new eligibility period was established. Do not change this field at each redetermination.

Elig Rvw Date replaced the “Redet Date” field. This is a non-editable field which displays the “Elg Rvw Date” from the Benefits - Medical tab. It is the same information which displays on UCMS as “Rvw.”

End Date is an existing field. This field is used to track the date an EPD case ends (closes). This is not to be used as a periodic review date. Only complete this field when the EPD case is closing.

End Reason is a new field for tracking. It is a drop down list which captures the reason the EPD case is closing.

What challenges do you face in increasing your earned income? This question was added to capture a person’s barriers to increasing their earnings/work. This is a drop down field. Multiple choices can be added.

- **EIE Tab**

The screenshot shows a software window titled "Oregon Access [Office : Disability Service Office (2417) Profile Type :- Branch]". The main window title is "Case for ANDREA I BOCELLI (Case Branch : Disability Service Office)". The "EPD" tab is selected. Below the tabs, there is a "List" section with a table:

Last Name	First Name	Start Date	End Date	Verified
BOCELLI	ANDREA	01/01/2004		Yes

Below the list is a "Detail" section with tabs for "General Info", "EIE", "Approved Account", and "Client Contribution". The "EIE" tab is active, showing "Employment and Independence Expenses (EIEs)".

Amount	Purpose	Frequency
250.00	Blind Work Expenses	Monthly

Buttons for "Add" and "Remove" are visible next to the table. At the bottom right of the detail section, there is a "Verified" checkbox which is checked. At the bottom of the window, there is a dropdown menu for "EPD Client Name" with "BOCELLI, ANDREA I" selected.

This sub-tab has not changed. Data entered on this tab is used to track EIE's used for eligibility. (Data listed on this screen is approved and documented on the SPD 850B.)

To add an EIE, select the “**Add**” button to create a new line. After you start typing the information into this field, a new line appears to allow multiple entries. After leaving the page, the blank line disappears.

To remove an EIE, select the record you wish to remove and select the “**Remove**” button.

- **Approved Account Tab**

This tab has changed to better track approved accounts used for eligibility.

The screenshot shows the Oregon Access software interface. The title bar reads "Oregon Access | Office : Disability Service Office (2417) Profile Type :- Branch". The menu bar includes File, Edit, Select, Status, Transfer, View, Mainframe, Windows, and Help. The toolbar contains various icons for file operations and navigation. The main window title is "Case for ANDREA I BOCELLI (Case Branch : Disability Service Office)". Below the title bar, there are several tabs: Incm / Empl, Resources, Property, Prop Trans, Shelt Cost, Funeral, Life/Bur Ins., and EPD. The "EPD" tab is selected. The interface is divided into several sections:

- List:** A table with columns: Last Name, First Name, Start Date, End Date, and Verified. The data row shows: BOCELLI, ANDREA, 01/01/2004, (blank), and Yes.
- Detail:** A section with sub-tabs: General Info, EIE, Approved Account, and Client Contribution. The "Approved Account" sub-tab is selected.
- Resource:** A table with columns: Account Type, Value, and buttons for "Approve Account" and "Delete Approval". The data rows are: Money Held for You by Others (100.00) and Retirement Fund (120,000.00).
- Existing Approved Accounts:** A table with columns: Account Type, Value, Approved Bal, Appd Dt, and Purpose. The data rows are: Retirement Fund (120,000.00, 120,000.00, 02/20/2004, To Retire at a Decent Age) and Savings Account (1,800.00, 1,800.00, 02/20/2004, Save for a Guide Dog).
- Verified:** A checkbox labeled "Verified" which is checked.
- EPD Client Name:** A dropdown menu showing "BOCELLI, ANDREA I".

Resource - Any resource listed on the Resource tab in ACCESS will be listed on this tab under the “Resource” section. If there are more than two resources, a scroll bar can be used to view additional resources.

To “approve” an account, highlight the appropriate resource and select the “Approve Account” button. The resource information will then display in the

Existing Approved Accounts section. The **Value** displayed on this screen is the value entered on the Resource page. It displays “greyed out” on this page and any changes to this field must be made on the Resource page. (NOTE: All Approved Accounts should be approved and documented using the SPD 805C.)

The **Approved Bal** (Approved Balance) is a new field and is editable. This field was created to capture the amount of the resource at the time of recertification.

Approved Dt (Approved Date) is a new field and is editable. This field was created to capture the date the resource was approved. It should only be changed if the purpose or approval has changed.

Purpose is a new field and is editable. This field was created to capture the reason for an approved account. This data should be the purpose which was listed on the SPD 850C.

- **Client Contribution**

This is a new sub-tab on the EPD tab. Previously the Cost Share and Premium were captured on the General Info tab. This information has been changed and moved to this new sub-tab to allow tracking and storage of this data.

List

Last Name	First Name	Start Date	End Date	Verified
BOCELLI	ANDREA	01/01/2004		Yes

Detail

General Info | EIE | Approved Account | **Client Contribution**

Current

Start Month	End Month	Calc Type	Amount	New Amount
00/0000	00/0000		.00	

History

Start Month	End Month	Calc Type	Amount	Entry DateTime
01/2004	02/2004	CBC/512	.00	8/9/2004 07:57:55
03/2004	04/2004	Nursing	.00	8/9/2004 07:59:06
04/2004	05/2004	Manual	37.00	8/9/2004 07:58:40
06/2004	06/2004	Manual	137.00	8/9/2004 08:12:05

Verified

EPD Client Name : BOCELLI , ANDREA I

Current Start Month is the month that the Client Contribution starts or the date a new calculation starts.

End Month is the month the person is no longer responsible for a Client Contribution or the last month of a calculation.

Calculation Type is a new field. This field was designed to display the type of calculation method used to determine their Client Contribution. Drop down choices include: CBC/512 (processed in the 512 system), Extended Eligibility (in extended eligibility status and calculating the amount using an SPD 850D), Manual (calculating the amount using an SPD 850D), or Nursing (processed through the ELGF system). Only Extended Eligibility and Manual will allow an amount to be entered for the Client Contribution. The other calculation types will have the amount field greyed out and uneditable, since they are collected through other payment systems.

When changing to a new calculation method, enter the month and year the calculation is changing into the End Month field. Select the **New Amount** button. The data which was in the “Current” section will move to “History” and a new blank line will be created in the Current section. Enter the new data in the Current section. The data in the Current section will remain there until the Client Contribution changes or ends.

If a mistake was made on a History record, highlight the record which was incorrect and select the Delete button. NOTE: This function will delete the record. It will appear as if the transaction had not existed and may create a break in history.

Remember, if the person is responsible for a Client Contribution, complete an SPD 850E complete with Hearing Rights on the back.

Edits were also created to allow for better tracking of the EPD program.

- **Medical Benefit - Pop-up Messages**

If the medical benefit status is changed on the medical benefits screen and there is an open EPD case, the worker will be prompted to close the EPD case in certain circumstances:

- If the Medical Benefit status is changed to: Closed, Denied, Death, Susmend or Withdrawn, and an EPD case is open, the worker will be prompted to close the EPD case.
- If the person status changes to NREL or INFO on the benefits overview screen and the EPD case is active, the worker will be prompted to close the EPD case.
- If a death date is entered, the EPD end date will prefill with the date of death and an EPD End Reason will be prefilled with Death. The Client Contribution will also end.

- **Pre-Integration Edits**

Edits have been added to validate EPD status. All edits were created to prompt the worker to take action; however, they are all bypassable.

- If there is an EPD Start Date and no EPD End Date, an edit will prompt the worker to add an EPD case descriptor to the case.
- IF there is an EPD Start Date and an EPD End Date, the edit will prompt the worker to remove the EPD case descriptor from the case.

EMPLOYMENT INITIATIVE (EI) PROGRAM

ACCESS has been modified to better capture the work activities of the EI Specialists and track services provided to EI clients. The module has been revised significantly and a new tracking system has been developed to track the hours worked by EI Specialists. A specialized training is being developed and presented to EI Specialists. EI Specialists and their managers are welcome to attend.

Security is also being added the Employment Initiative screens. The existing and new screens for the EI Program will now be view only. Only EI Specialists will be allowed to update/change data on these screens. Questions on screen availability and security should be directed to the local sub-administrator.

Specific questions about the EI changes or the training can be directed to Brenda Sheppard (503-947-5204) or Lauren Mitchell (503-945-6479).

CLIENT ASSESSMENT AND PLANNING SYSTEMS (CA/PS)

A new screen was created in the CA/PS system to capture work supports needed. This screen is referred to as the Work Support Screen or Attendant Care Services (ACS) screen.

This new screen is a “leaf” in the Care Planning section, entitled “Work Supports.” This screen was created to capture the At Work Support hours required by an individual when working. This screen will be available when a person has a CA/PS assessment and an open employment record.

ADL/IADL Need	Hours of Paid/Unpaid Support at Work
Eating	1
Dressing/Grooming	2
Bath/Personal Hygiene	2
Mobility	10
Bowel/Bladder	
Cognition	
Medication Management	
Transport	10
Breakfast	

No supports provided at work

What impacts your ability to work more?

- Lack of ACS
- Limited Transport
- Loss of Benefit

Add Remove

- **At Work Support** hours can be captured by each ADL/IADL, or there is a selection for “**No Supports Provided at Work.**” Hours must be entered in full hour increments. No partial hours will be accepted.
- The first time you enter this screen, the “No Supports Provided at Work” flag will be selected and the screen will be “greyed out.” Deselect the flag to activate the screen.

NOTE: Hours captured on this screen should reflect hours being used, either paid or unpaid, to support the individual at work. These are **not** additional hours to those designated in the In-Home Plan and should be entered for clients in any service setting.

- **What impacts your ability to work more?** This question was added to capture a person's barriers to working. This is a drop down field.

REPORTS

- **ACS Work Restrictions Report**
 - This is a new report. (Primarily Central Office Use)
 - This report sums the number of occurrences of each restriction (impact) type by branch and number of clients.
- **ACS Work Supports Screen**
 - This is a new report. (Primarily Central Office Use)
 - It is sorted by branch and ADL/IADL, according to the date range chosen.
- **EPD Approved Accounts Report**
 - This is a new report.
 - Sorted by branch, then by EPD status.
 - Displays: client name, SSN, EPD status, resource name, purpose, balance, and approved date.
- **EPD Branch Report**
 - This is an existing report.
 - It has been modified with a new filter: active, new or closed EPD cases.
- **EPD Client Contribution Report**
 - This is a new report.
 - It can be filtered by: branch, month/year or active/closed status.
 - Displays: worker name, client name, SSN, current status, contribution method and amount.
- **EPD Employment and Independence Expense Report**
 - This is a new report.
 - Sorted by branch, then by EPD status.
 - Displays: client name, SSN, EPD status, EIE purpose, EIE frequency and EIE amount.

No new reports were created for the employment screen changes. EI Reports will be discussed in the EI Specialists training.