DHS Oregon Department of Human Services

Select originating cluster

Information Memorandum Transmittal

Cindy Hannum
Authorized Signature

Number: **SPD-IM-04-114**
Issue Date: 12/20/2004

Topic: Systems Issues

Subject: Oregon ACCESS Release 19.95

Applies to (check all that apply):

- ☒ All DHS employees
- ☒ Area Agencies on Aging
- ☐ Children, Adults and Families
- ☐ County DD Program Managers
- ☐ County Mental Health Directors
- ☐ Health Services
- ☒ Seniors and People with Disabilities
- ☐ Other (please specify):

Message:
The Oregon ACCESS Release 19.95 was available to the field on 12/20/04. The new version 19.95 has some enhancements, one bug fix, and a new sub-tab. For more information refer to the two attachments. To view the notes for the CA 598 Task List open the PDF online, if printed the notes will not be available.

If further assistance is required for systems issues contact the Help Desk at (503) 945-5623. For any policy related questions please contact the appropriate Central Office staff, they are as follows:

* Brenda Sheppard, EPD Program Coordinator (503) 947-5204
* Lauren Mitchell, EI Program Coordinator (503) 945-6479
* Mary Lang, In-Home Service Coordinator (503) 945-5799
* Amy Evenson, OAA Program Coordinator (503) 945-5734
* Judy Bowen, FCSP/OAA Program Coordinator (503) 945-6401

If you have any questions about this information, contact:

Contact(s):	DHS Help Desk		
Phone:	(503) 945-5623	**Fax:**	(503) 378-2161
E-mail:	DHR.HELPDESK@state.or.us		

Oregon ACCESS Release 19.95
Effective 12/20/04

Overview

- **General Functions**

  The CIS registration process for adding a person to an existing case record using the download feature from CIS was not working correctly in some instances. This is fixed in the current Oregon ACCESS version 19.95. (See the Detail section for more information)

- **CA 598 Task List**

  The CA598 Task List was modified in this release. The section 3 on the CA598 form has a correction to the text "Medical Management" to "Medication Management". The section 4 on the CA 598 form is new. (See the Detail section for more information)

- **SDS 708 Disability Referral data collection and form**

  The SDS 708 Disability Referral form has been updated to match the Forms Server version. The Education Tab, Physical Tab, Med. Services Tab, Income Tab and Employment Tab pull information to the SDS 708 Disability Referral form. In order for the form to be updated the tabs that collect data in Oregon ACCESS required some modifications. The SDS 708 will not print in Remote Oregon ACCESS all printing must be done in Consolidated Oregon ACCESS. The data that populates the SDS 708 can be completed in Remote Oregon ACCESS then a user can print in Consolidated Oregon ACCESS. (See the SPD-AR-04-055 Transmittal titled "Oregon ACCESS changes and 708 Form Updates".)

- **EPD Tab**

  The EPD Tab was updated in Oregon ACCESS Release 19.9. The update required a few post implementation enhancements in this release. The EPD Tab is located in the Financial Section of a Case Module the tab has four sub-tabs General Info, EIE, Approved Account, and Client Contribution. For policy questions please contact the EPD Policy

Analyst Brenda Sheppard (503) 947-5204. The following changes were made:

- New edit warning on the EPD sub-tabs. A delete action using the Trash Can Icon will delete the entire EPD record.

- New calculation type of "DD Collection" on the Contribution sub-tab located on the EPD Tab in a Case Module.

- The EPD Client Contribution Report will now display contribution amounts of $0.00 when the check box is marked.

(See the Detail section for more information)

- **Attendant Care Services (ACS) Reports**

  ACS Work Restrictions and ACS Work Supports Reports are removed from Oregon ACCESS. In the near future this information will be available on MOBIUS.

- **EI Assessment /EI Services Tab/EI Time Tracking**

  The Employment Initiative (EI) Tabs were updated and a new EI Time Tracking feature was added in Oregon ACCESS Release 19.9. The enhancements required some post implementation changes. For policy questions related to EI Program please contact the EI Policy Analyst, Lauren Mitchell (503) 945-6479. The following changes were made:

  - New edit warning a user that EI Time Tracking and EI Billing could be affected if the Eligibility Status is changed on the EI Assessment Tab in the Case Module.

  - New edit preventing overlapping dates for EI Assessment records.

  - New edit preventing entry of an EI assessment record end date if an EI service record exists beyond the end date, for that assessment record.

  - New edit preventing entry of an EI service record with a date beyond the existing end date of the EI assessment record.

- The EI service type of "OVRS Referral" is obsolete. ALL existing EI service records marked "OVRS Referral" were converted to the EI service type of "Other*".

- EI Time Tracking will display all clients assigned to an EI worker during a specified time period for all the branches with which that EI Worker is associated. This will only work if the EI Worker is assigned with the role of "EI Worker" on the Case Overview Tab in the Case Module.

- EI Services that display with an asterisk (*) after the text are non-billable to OVRS those with nothing are billable. They will now pull as such to the EI Billing Summary and Detail Reports.

- The Billable Group Activities that have clients with varied eligibility status (VR, SPD, Mutual, Pending) will default to highest level assigned in the group. The display order for the billing reports for EI group activities is OVRS, Mutual, SPD, then Pending. This means if one client is OVRS then the hours will display under OVRS billable column, if no clients have OVRS then the next highest will display on the EI billing reports.

  For example: Client A status VR, Client B status Pending, Client C status SPD, and Client C status Mutual. The hours will show once under Billable Group Activity OVRS.

- **Family Caregiver Support Program (FCSP) Tab**

  A new sub-tab has been added to the OAA Service Tab located in the Case Module Special Needs (AKA Smiley Face) section. The OAA Service Tab is now labeled OAA SVC/FCSP. When selected two tabs will appear –OAA Service and FCSP.

  The FCSP Tab is new in this release. It will be used for the Family Caregiver Support Program (FCSP) only. The AAA offices administer the FCSP program. Policy for the program is managed by OAA Program/Policy staff in the Central Office. The Family Caregiver Support Program serves a specific population of unpaid caregivers who may require supports to continue providing quality care. The caregiver is the client for this program.

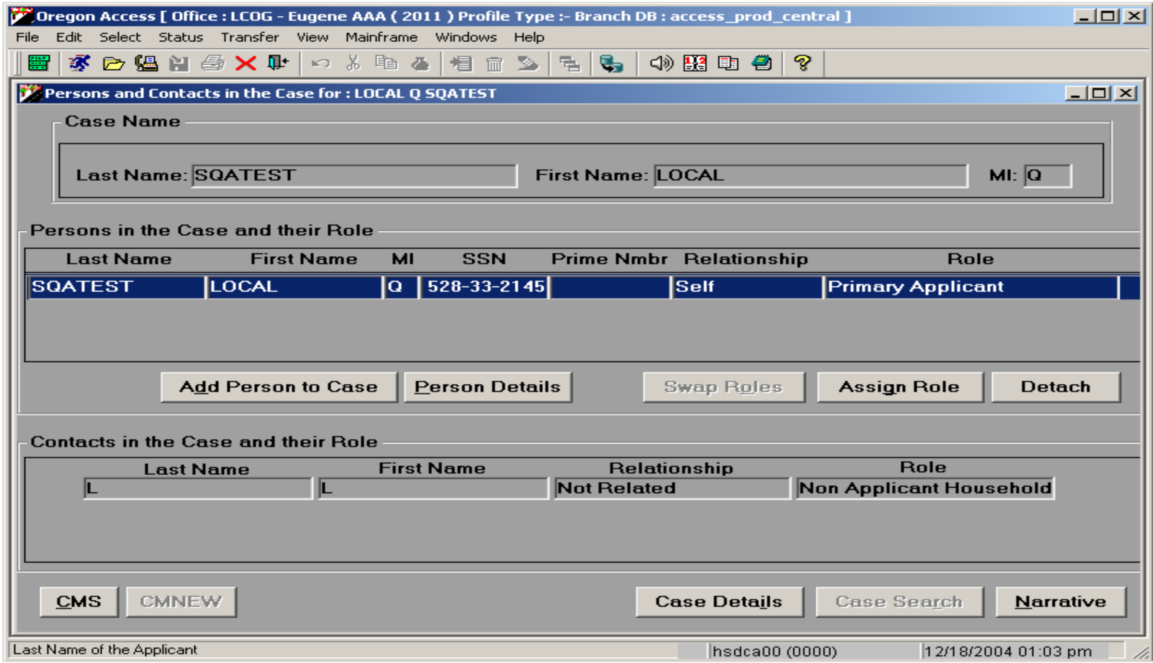
The Administration on Aging (AoA) requires all recipients of OAA and FCSP funds to report specific data using the National Aging and Program Information System (NAPIS). To meet this reporting requirement, additional data regarding the FCSP program needed to be collected in Oregon ACCESS. The new FCSP tab was designed for collecting this data. In a later phase, we will work on reporting out the collected FCSP data to meet Federal-reporting requirements. (See the SPD-IM-04-112 titled "Older Americans Act Programs-Family Caregiver Support Program Service Definition clarifications and addition of FCSP Tab in Oregon ACCESS".)

Details

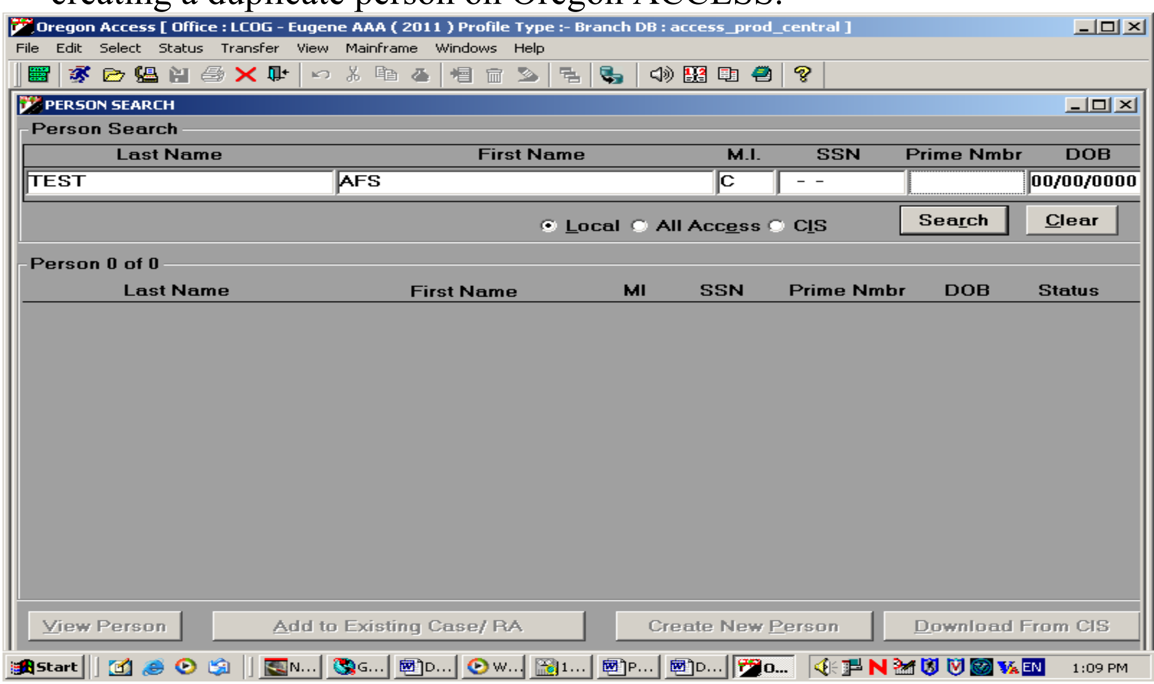
- **Add to Existing Person from CIS (Mainframe)**

We have fixed an existing bug on Oregon ACCESS. The bug occurred when staff attempted to add a new person to an existing case module by using the "Add Person to Case" function. If the person that was being added did not exist on Oregon ACCESS, but they existed on the Mainframe (WEBM,FIND/CIS) the "Assign Existing" button would be disabled and the "Assign New" button would be enabled. This would cause users to create a new case record for a person in error. The following screen samples show the steps to take for adding a person to a case.

1. To add a person to an existing case you must be on the Person and Contacts in the Case screen. In the middle of the screen is a button "Add Person to Case". To add a person to the existing case, click the button.

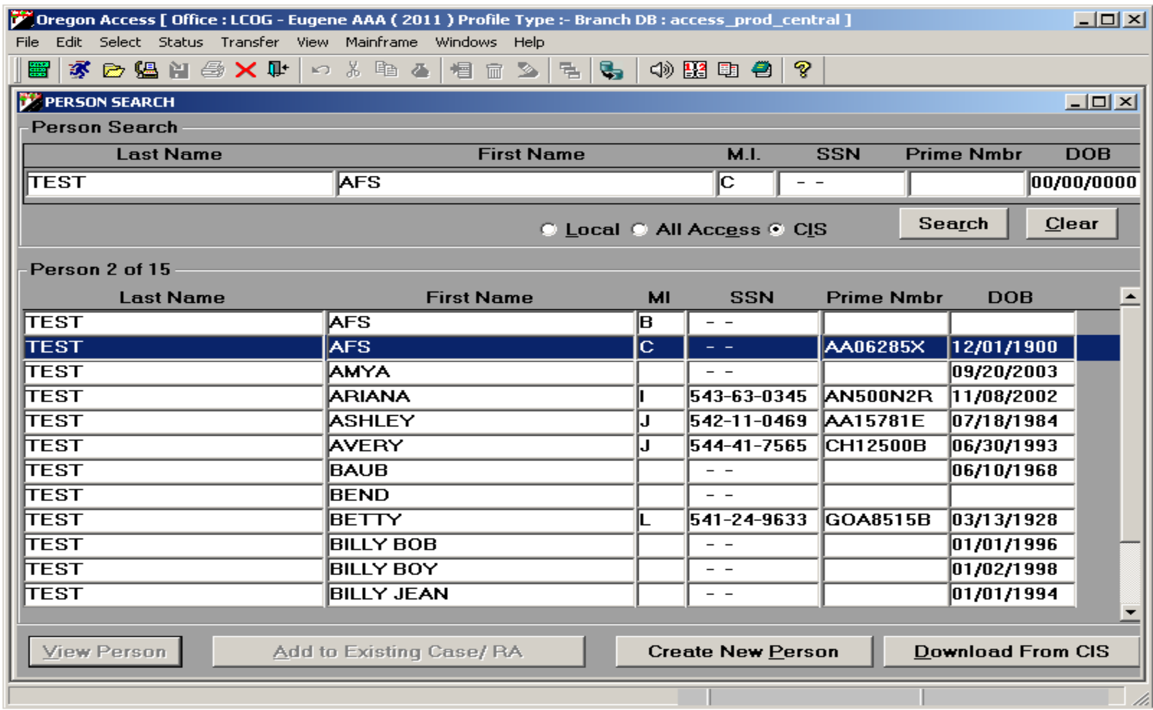


2. After the Add Person to Case button is clicked, the Person Search Screen will appear. Enter the Name, SSN, Date of Birth, and/or Prime Number to search the Local, All ACCESS, and CIS databases for the person. The more information you can enter the better to avoid creating a duplicate person on Oregon ACCESS.



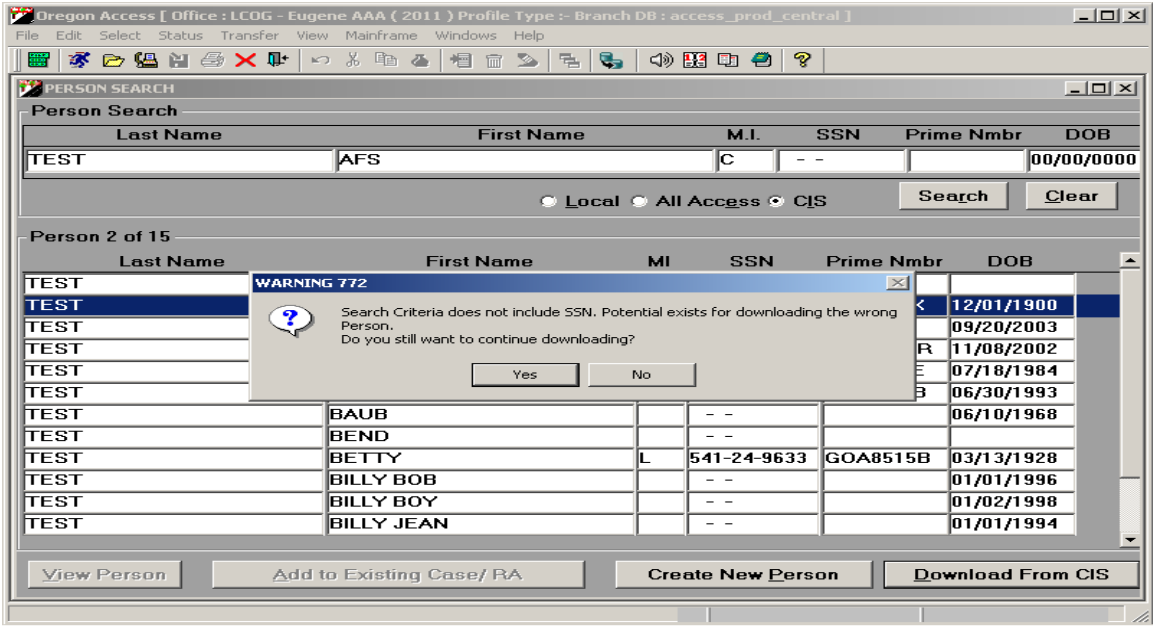
3. After the information for the person is entered click the "Search" button. If the person does not exist in Oregon ACCESS the radial

button for “CIS” in the middle of the screen will be populated. This means that the person is not found in Oregon ACCESS, and the system has proceeded to search the mainframe CIS system. The return list is the same list that you would get if you used the WEBM.FIND function directly on the mainframe.

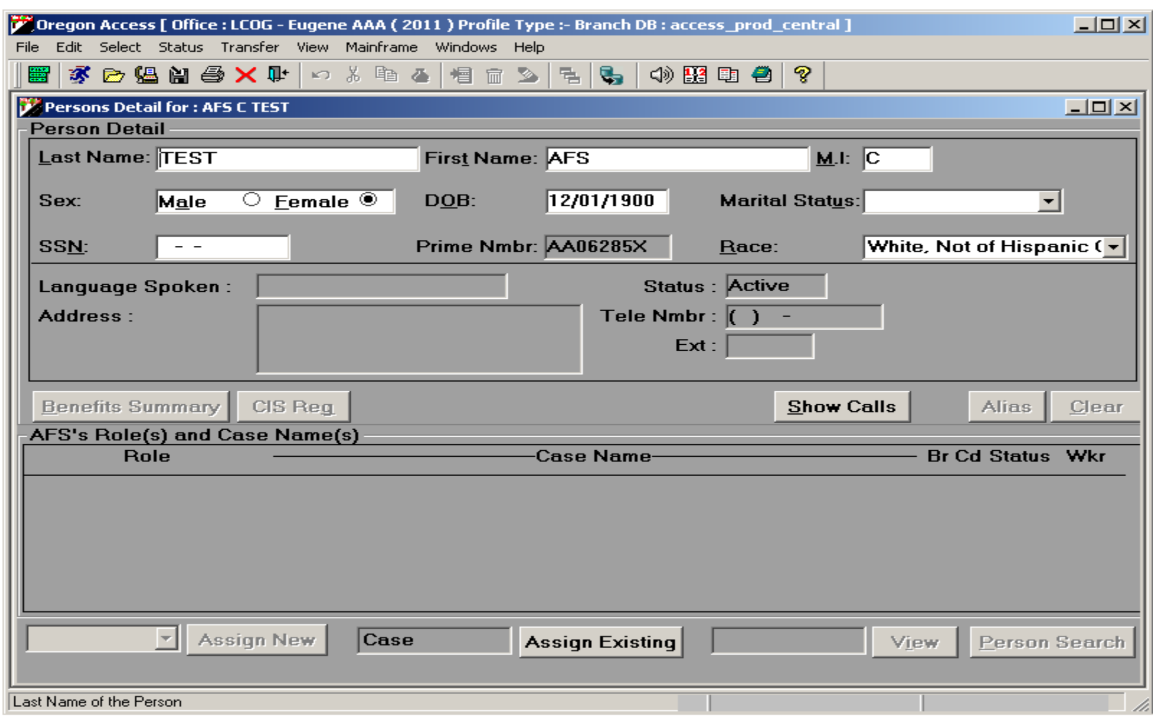


4. Review the results pulled back from CIS to find the correct person. If an exact match is found in CIS, the system will only return that match. Otherwise, they system will return a list of possible matches from which you may choose. Highlight the correct selection and click “Download From CIS” button at the bottom right hand corner of the screen.

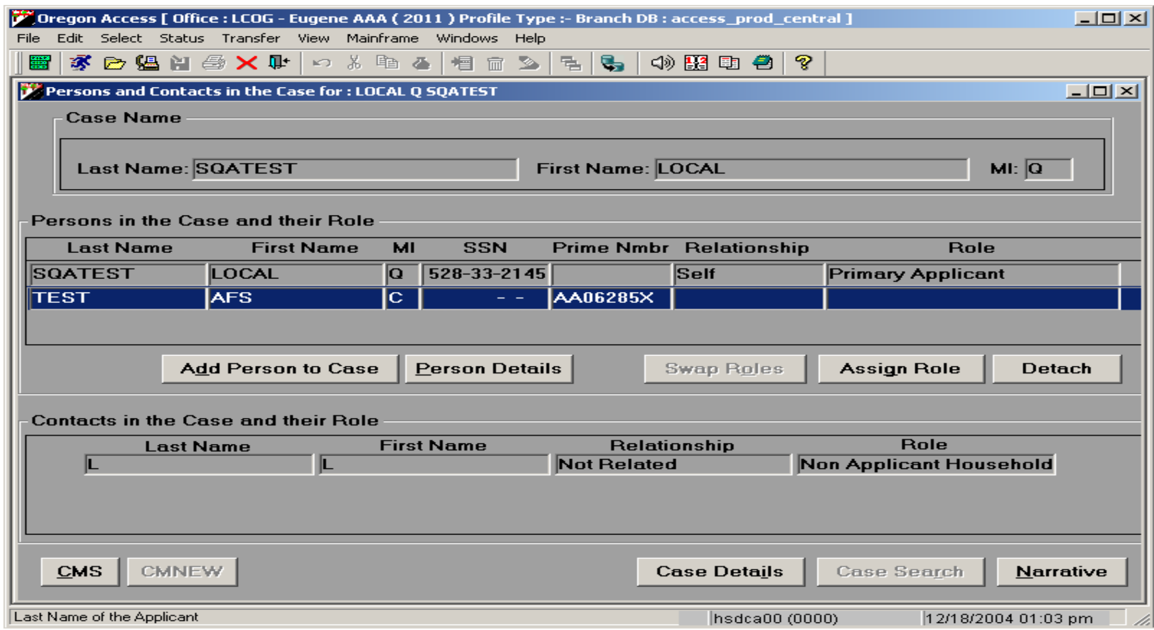
5. The Warning 772 will appear. Read it and respond accordingly. If you are not sure this is the person you want, stop and confirm SSN or Prime Number before continuing further.



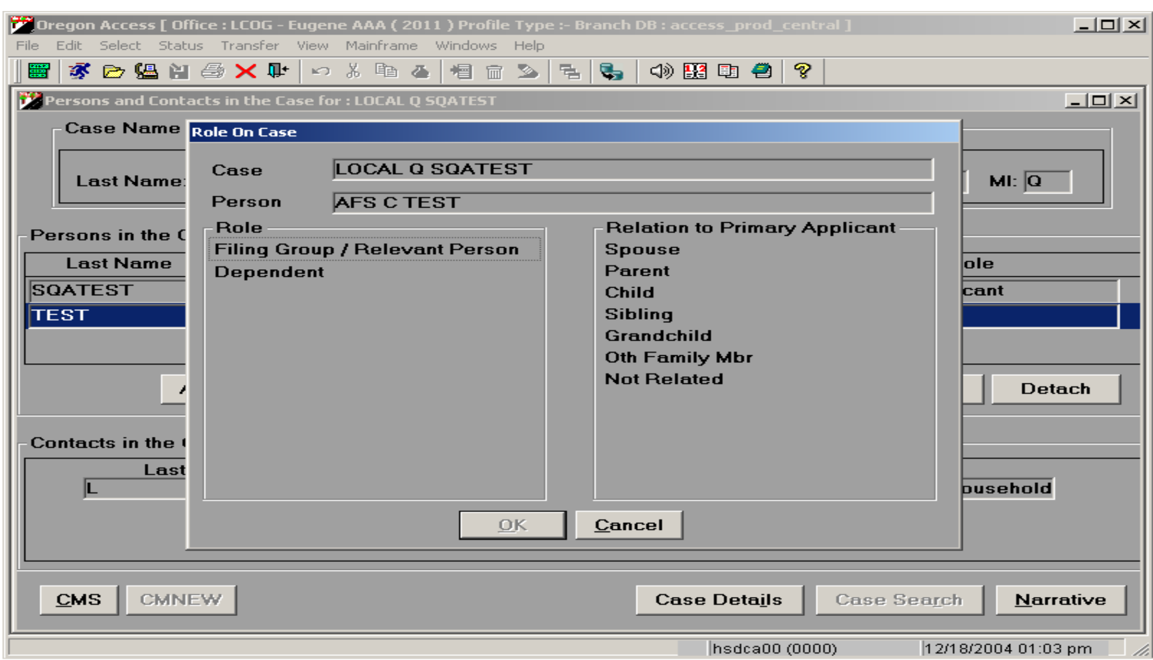
6. After the person information is confirmed and the "Yes" button is clicked for the warning message 772, the Person Detail Screen will appear. The user may add any missing information at this time. At the bottom of the page a button "Assign Existing" will be enabled. Click this button to proceed.



7. The “Assign Existing” button will open the Persons and Contacts for Case Screen. The screen will now show the person you just added on the Person in the Case and Role list.

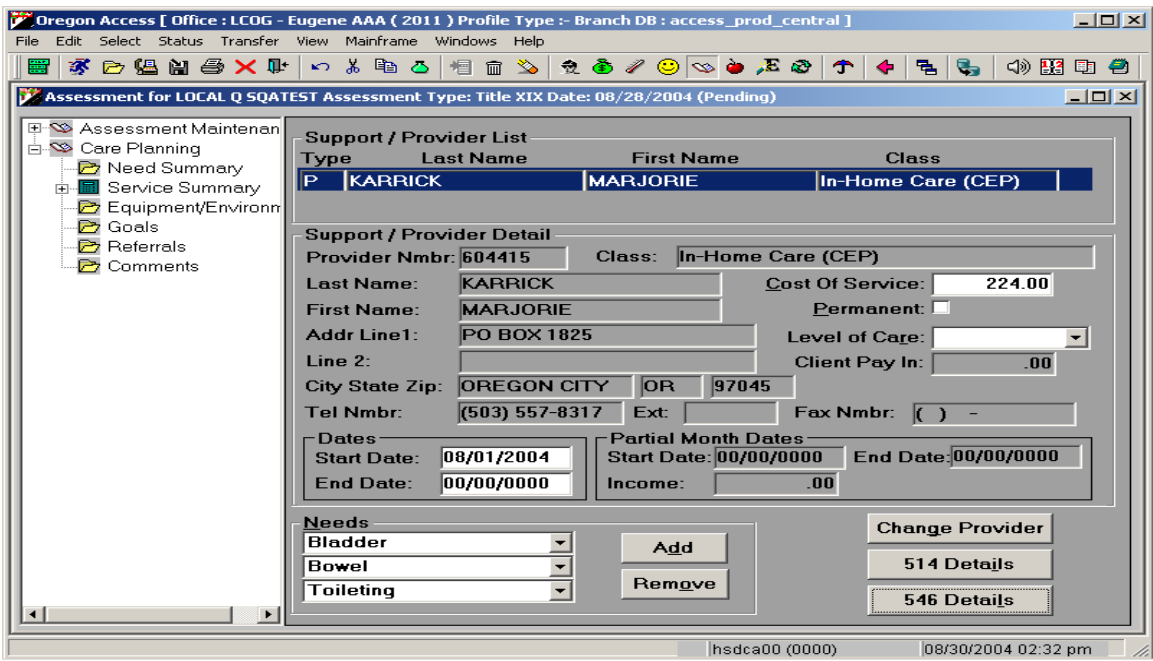


8. The final step is to assign the Role and Relationship for the new person on the case record.

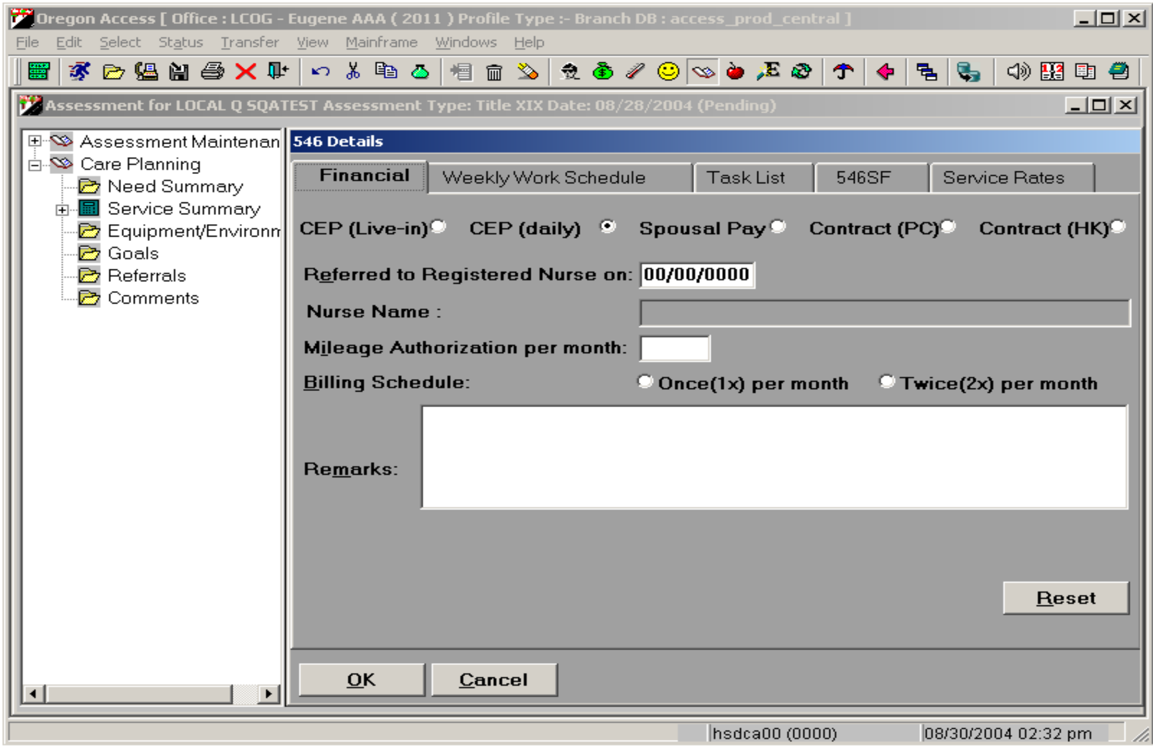


- **CA 598 Task List**

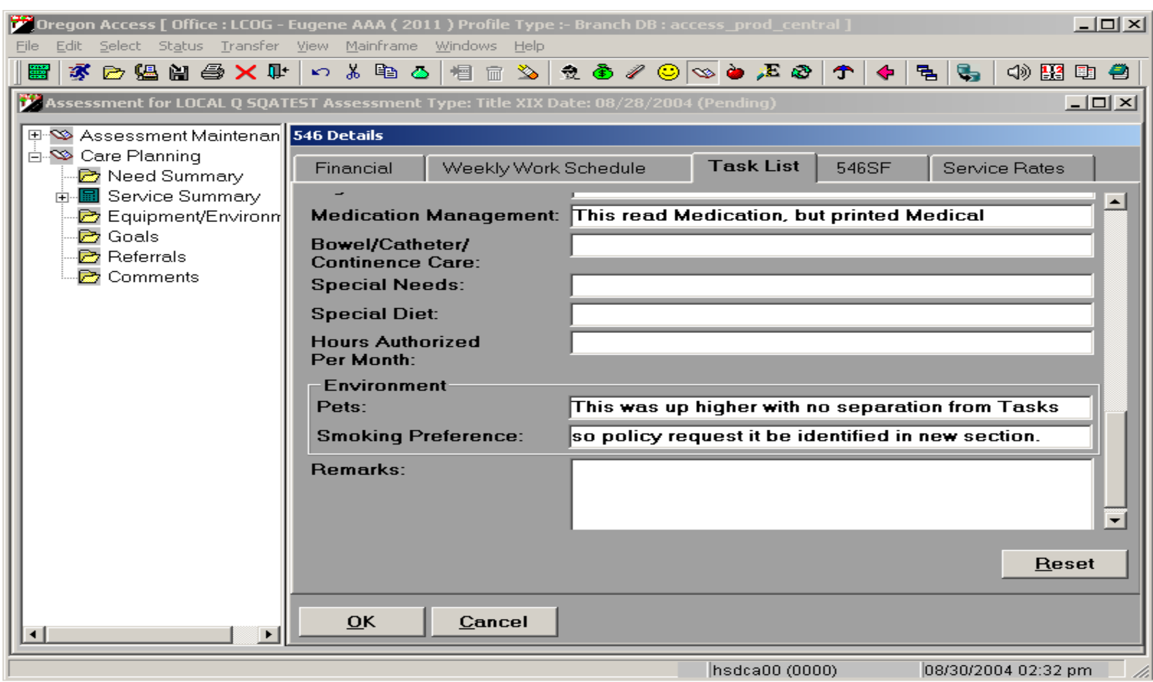
The SDS598 Task List was not modified, since it is obsolete and should not be used anymore. The CA 598 Task List had a discrepancy in the wording that appeared on both the CA/PS 546 Details Task List Tab and the actual printed form. Medication Management displayed and printed as Medical Management. This has been corrected both online and in the printed version. The wording now reads Medication Management. The Pet and Smoking Preference questions are in a new section labeled Environment section 4.

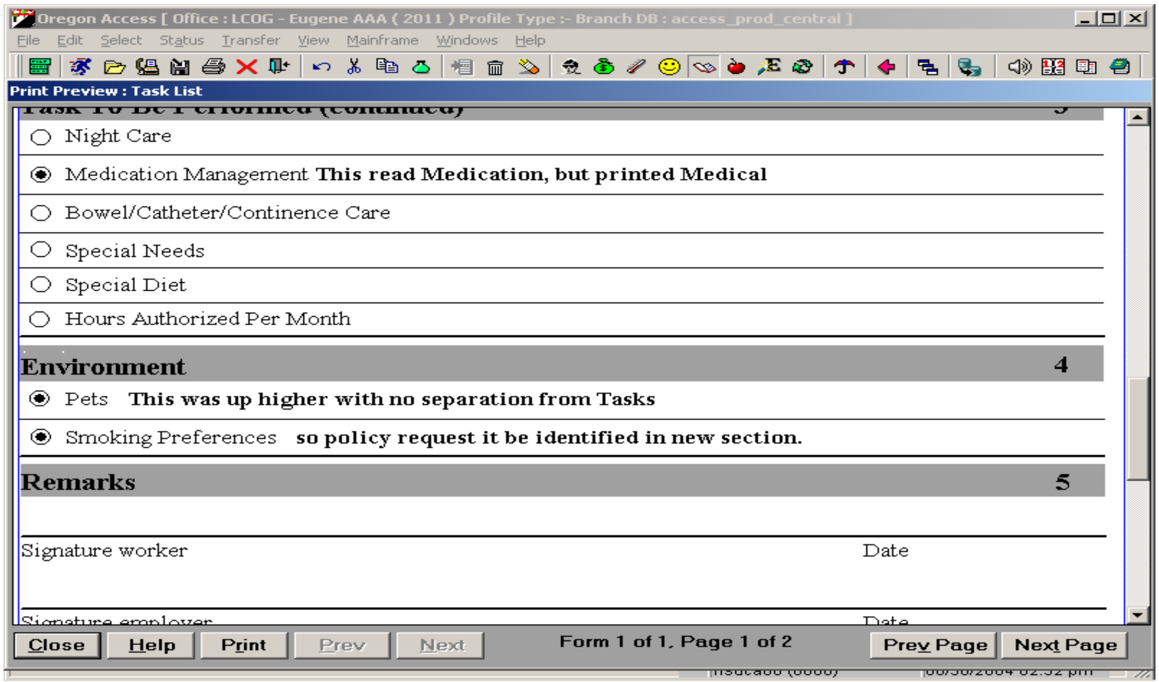


The CA 598 data is entered on the 546 Details Screen. To access the data, go into the appropriate CA/PS Assessment in the Care Planning then Service Summary section. Click the “546 Detail” button on bottom right hand corner. This will open the 546 Detail Screen; select the Tasks sub-tab (see following screen samples). Once the Task List is showing scroll to the bottom. The list has a line for Medication Management; this was showing on the printed version as Medical Management in error. This is corrected now. The section with a white box labeled Environment is now section 4 of the list as requested by policy. They wanted the tasks separated from environmental information.



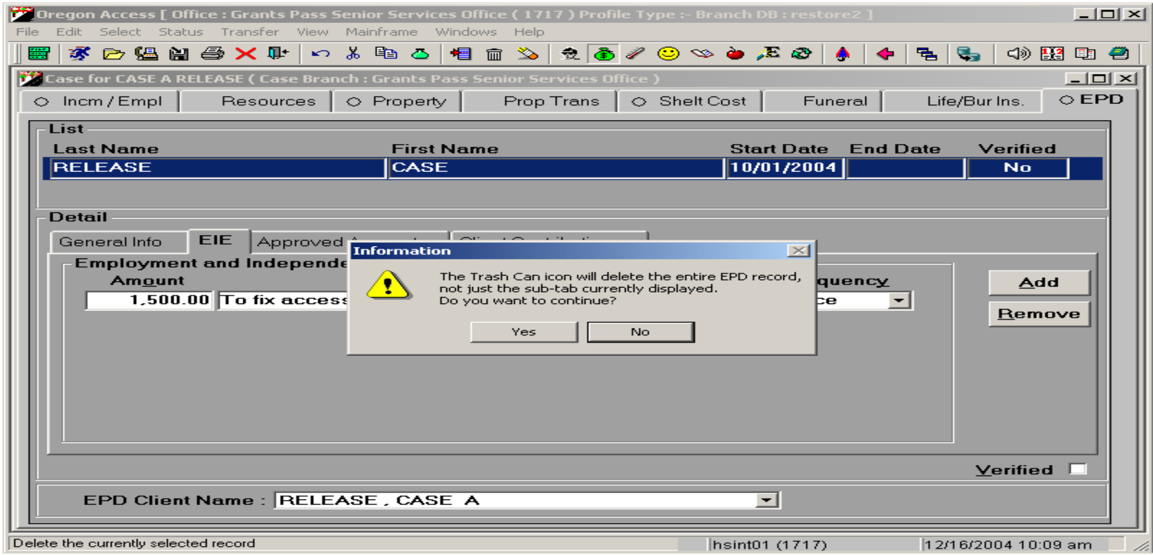
The next two screen samples show the text on the 546 Detail Screen and actual preview of text on the CA598 Task List.

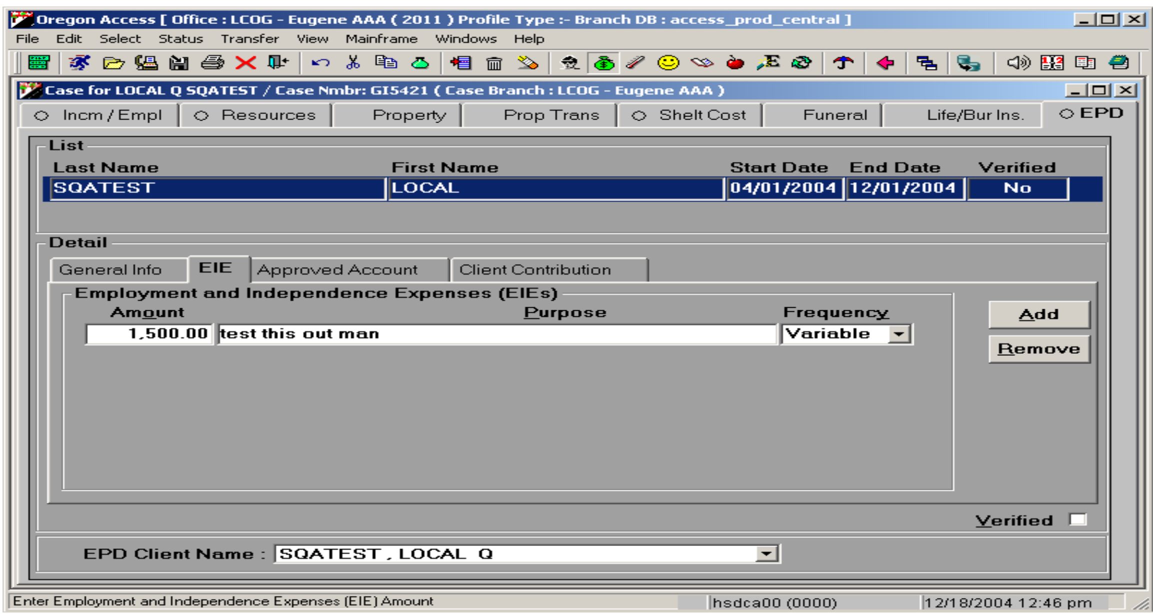


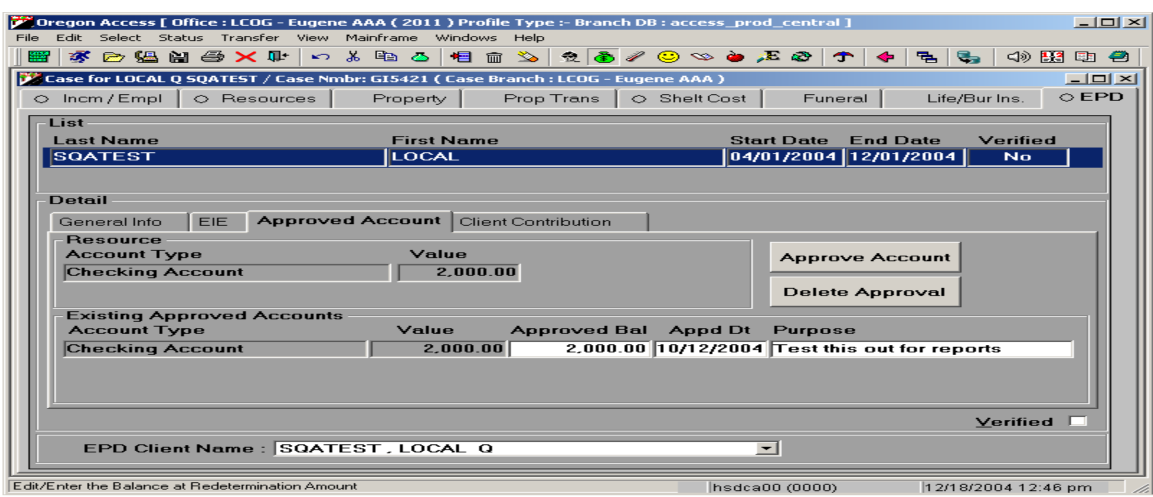


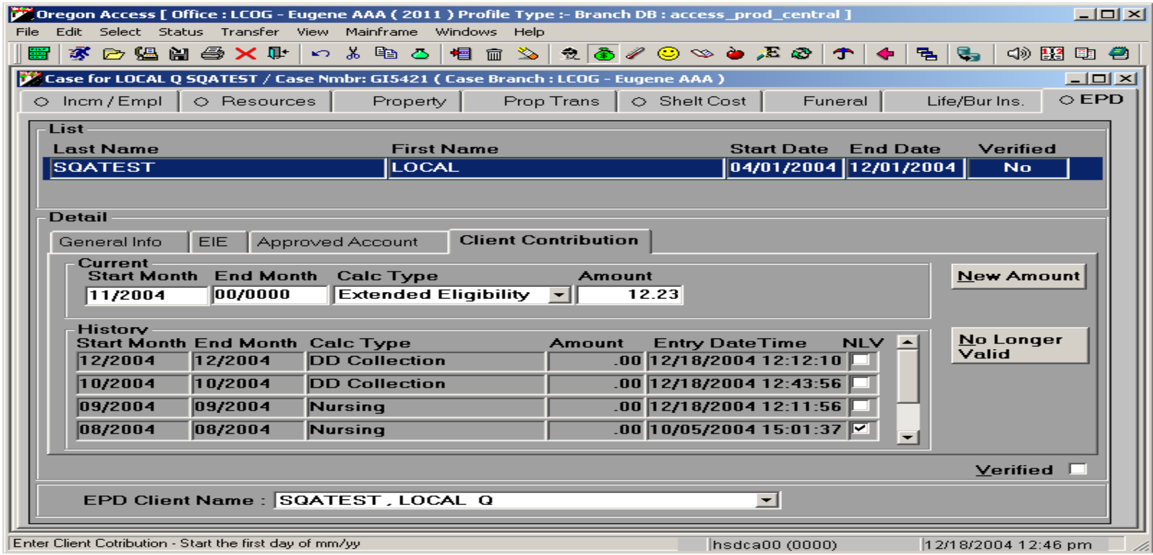
- **New EPD Edit**

The new edit will warn a user that using the Delete Icon (trash can on toolbar) on any of the EPD sub-tabs will delete the entire EPD record. The user should remove unwanted information on the sub-tabs using the unique buttons for this functionality on each sub-tab. The General Info and EIE sub-tabs use "Add/ Remove" buttons on right hand side of the screen. The Approved Accounts sub-tab uses the "Approve Account" and "Delete Approval" buttons on right hand side of the screen. The Client Contribution sub-tab uses the "New Amount" and "No Longer Valid" buttons. They all work the same way. To add a new record select Add, Approve Account, or New Amount the screen may require the user to highlight the selection they are adding. To remove a record or mark one no longer valid highlight the record you want to delete or mark invalid then click the appropriate button. See the screen samples on the next two pages.

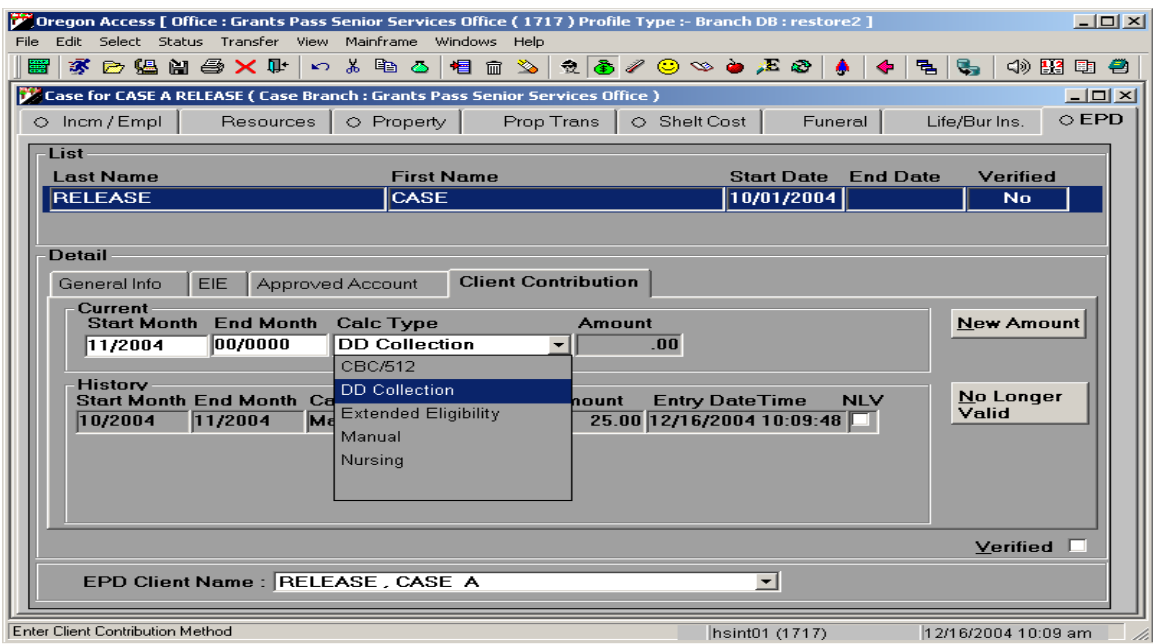

Oregon Access [Office : Grants Pass Senior Services Office (1717) Profile Type :- Branch DB : restore2]
File Edit Select Status Transfer View Mainframe Windows Help
Case for CASE A RELEASE (Case Branch : Grants Pass Senior Services Office)
Incm / Empl
Resources
Property
Prop Trans
Shelt Cost
Funeral
Life/Bur Ins.
EPD
List
Last Name
First Name
Start Date
End Date
Verified
RELEASE
CASE
10/01/2004
No
Detail
General Info
EIE
Approved
Employment and Independe
Amount
1,500.00
To fix access
Information
The Trash Can icon will delete the entire EPD record, not just the sub-tab currently displayed.
Do you want to continue?
Yes
No
Add
Remove
Verified
EPD Client Name :
RELEASE , CASE A
Delete the currently selected record
hsint01 (1717)
12/16/2004 10:09 am


Oregon Access [Office : LCOG - Eugene AAA (2011) Profile Type :- Branch DB : access_prod_central]
File Edit Select Status Transfer View Mainframe Windows Help
Case for LOCAL Q SQATEST / Case Nmbr: GI5421 (Case Branch : LCOG - Eugene AAA)
Incm / Empl
Resources
Property
Prop Trans
Shelt Cost
Funeral
Life/Bur Ins.
EPD
List
Last Name
First Name
Start Date
End Date
Verified
SQATEST
LOCAL
04/01/2004
12/01/2004
No
Detail
General Info
EIE
Approved Account
Client Contribution
Employment and Independence Expenses (EIEs)
Amount
Purpose
Frequency
1,500.00
test this out man
Variable
Add
Remove
Verified
EPD Client Name :
SQATEST , LOCAL Q
Enter Employment and Independence Expenses (EIE) Amount
hsdca00 (0000)
12/18/2004 12:46 pm


Oregon Access [Office : LCOG - Eugene AAA (2011) Profile Type :- Branch DB : access_prod_central]
File Edit Select Status Transfer View Mainframe Windows Help
Case for LOCAL Q SQATEST / Case Nmbr: GI5421 (Case Branch : LCOG - Eugene AAA)
Incm / Empl
Resources
Property
Prop Trans
Shelt Cost
Funeral
Life/Bur Ins.
EPD
List
Last Name
First Name
Start Date
End Date
Verified
SQATEST
LOCAL
04/01/2004
12/01/2004
No
Detail
General Info
EIE
Approved Account
Client Contribution
Resource
Account Type
Value
Checking Account
2,000.00
Approve Account
Delete Approval
Existing Approved Accounts
Account Type
Value
Approved Bal
Appd Dt
Purpose
Checking Account
2,000.00
2,000.00
10/12/2004
Test this out for reports
Verified
EPD Client Name :
SQATEST , LOCAL Q
Edit/Enter the Balance at Redetermination Amount
hsdca00 (0000)
12/18/2004 12:46 pm



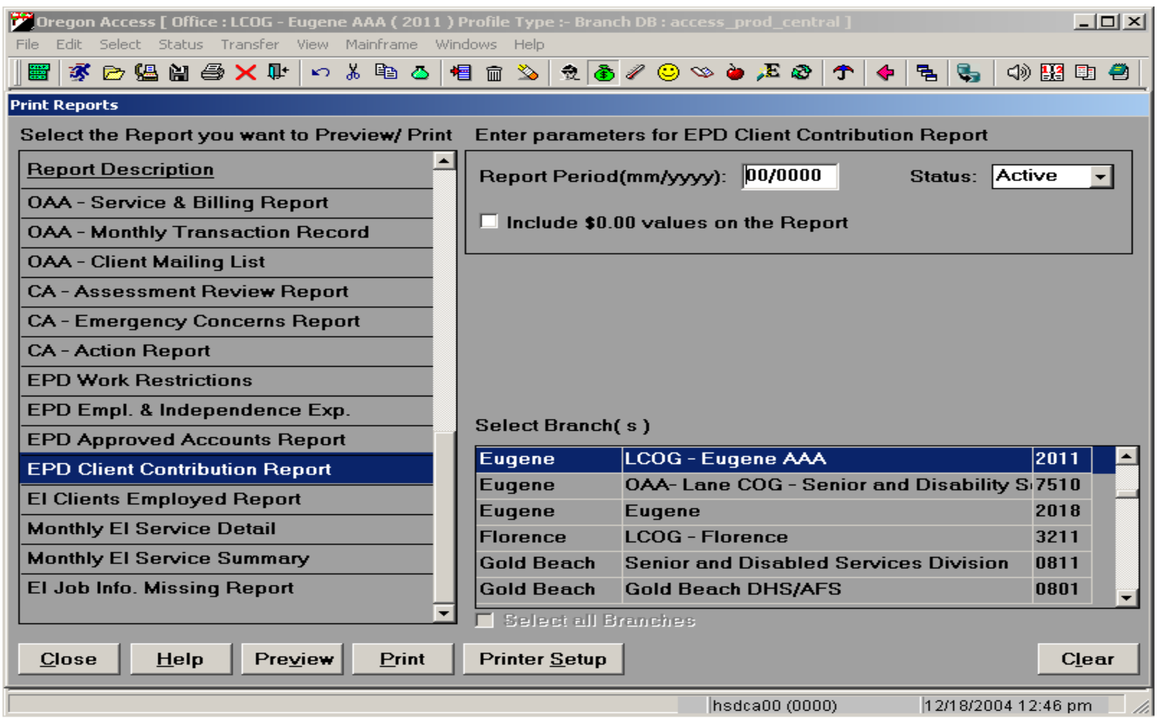
- **EPD New Client Contribution**



The EPD Client Contribution sub-tab has a drop down selection for DD Collection. This will automatically give a $0.00 amount per policy.

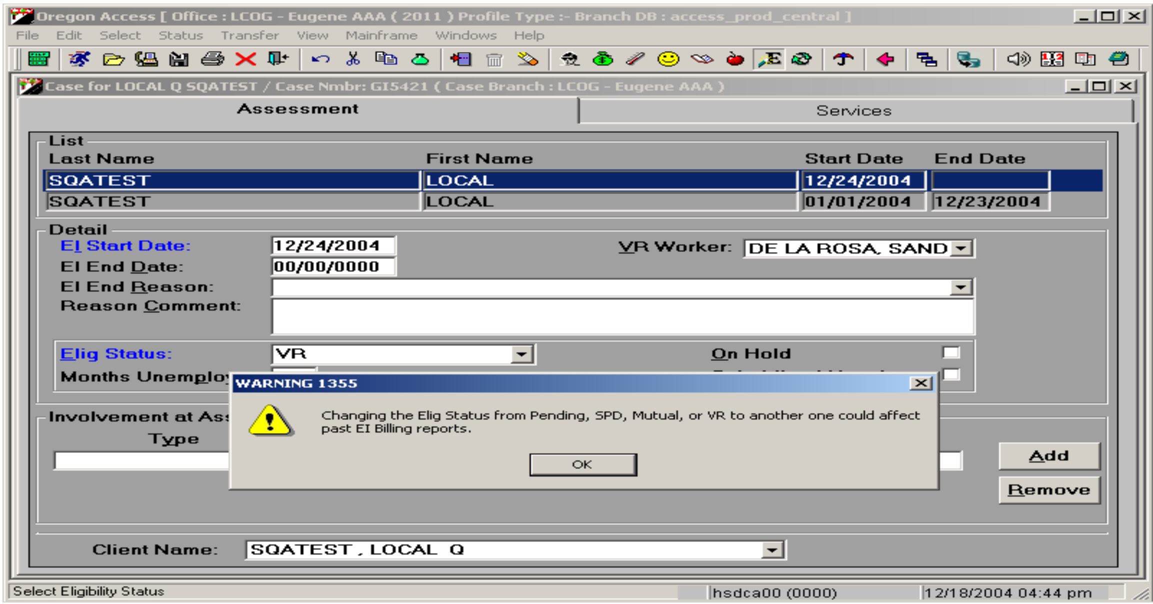
- **EPD Client Contribution Report**

The Client Contribution Report can be viewed for contributions with $0.00 cost. The user must check the box for “include $0.00 values on the Report” to display in the report. The user must also select what case status they would like to view. This is done by selecting from the “Status” dropdown list. For example, if a user would like to see the 10/2004 contribution for a case that closed in 11/2004, they would have to generate the report for Closed cases by selecting “Closed” from the “Status” drop down list.

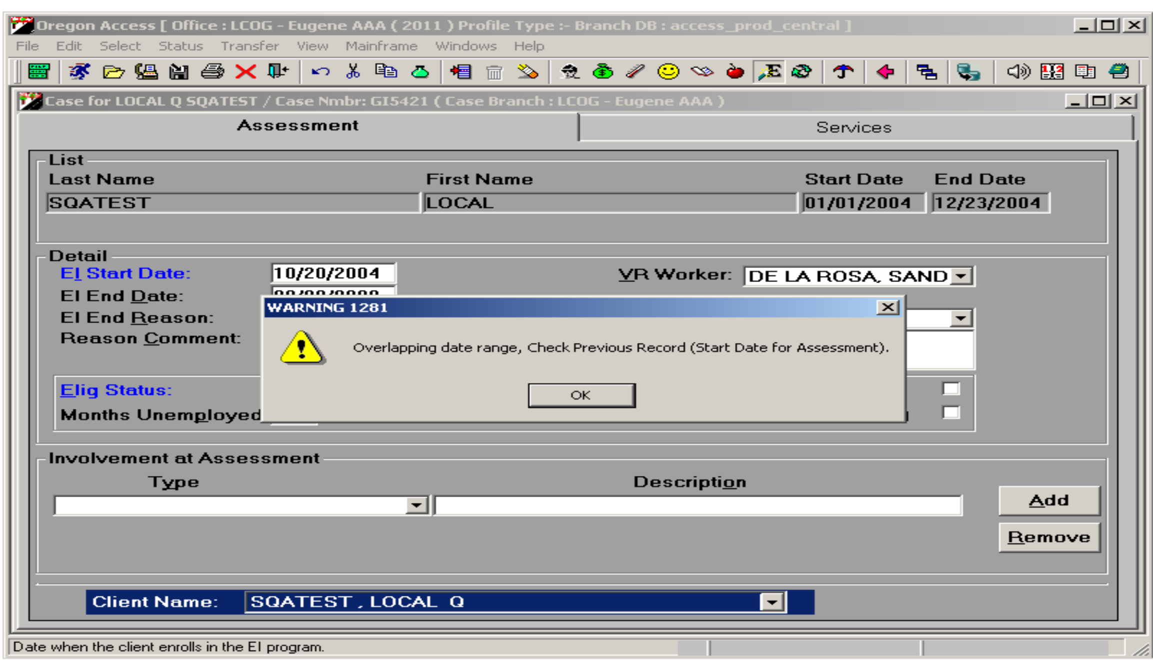


- **EI Assessment Edits**

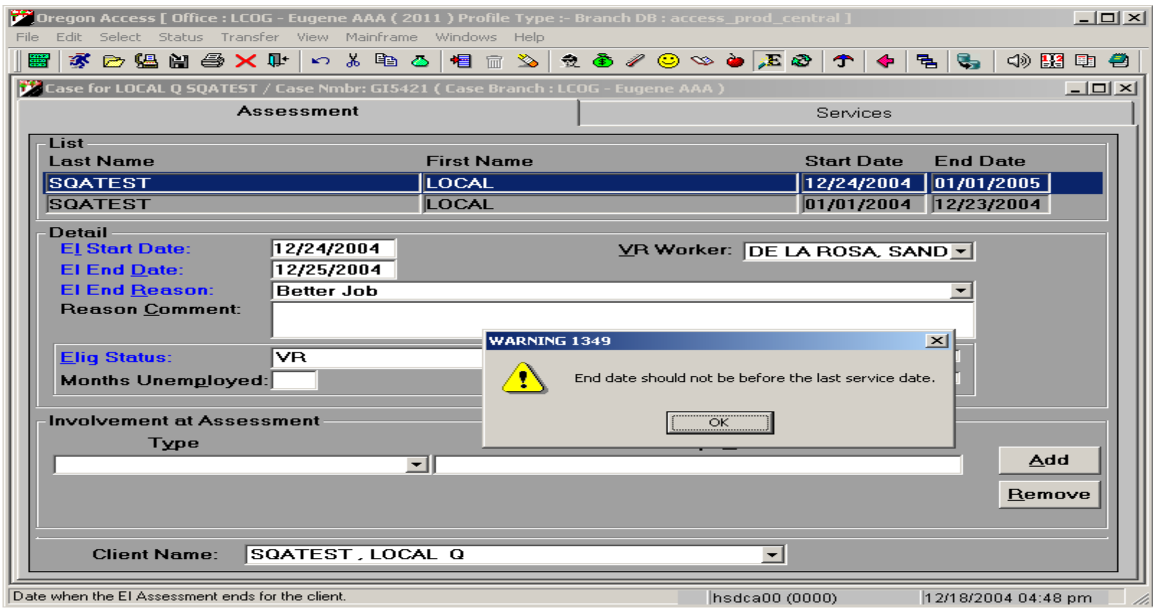
The following warning will appear if a user changes an eligibility status on a saved EI Assessment record. Changing the eligibility status will change all the billing reports information in the past and future, no history exists at this time.



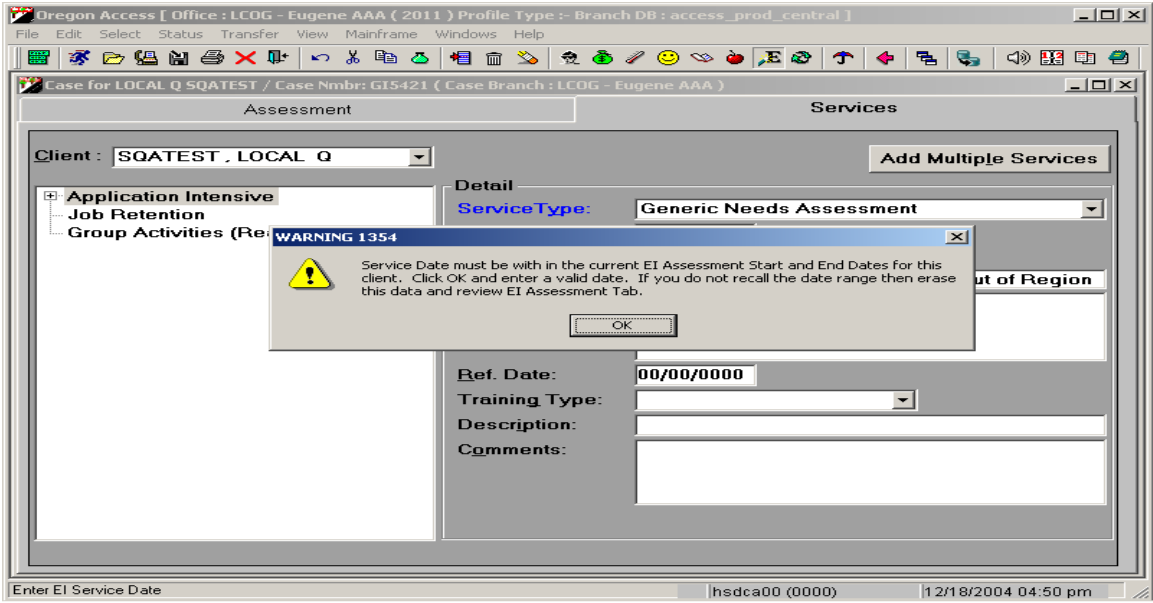
The next edit will appear if a user tries to create a new EI Assessment during the time period of an existing or closed EI Assessment. Per Policy only one EI Assessment should be open per client at a time. If a user has more service information to enter this must be done on the EI Assessment record for the time period. Review the EI Assessment Tab List for the correct record to update.



The following edit will be returned if a worker tries to enter an EI End date for an EI Assessment record with services beyond the date being entered. The following example had a service on the EI Service Tab dated 12/31/2004. The user tried to enter an EI End date for a record with services that extended beyond that end date.



The following edit will be returned if a user tries to enter an EI service beyond the date the EI Assessment record that is currently open was ended. This case had an end date of 12/31/2004 for the current EI Assessment. The user tried to add a service dated 01/02/2005.


Oregon Access [Office : LCOG - Eugene AAA (2011) Profile Type :- Branch DB : access_prod_central]
File Edit Select Status Transfer View Mainframe Windows Help
Case for LOCAL Q SQATEST / Case Nmbr: GI5421 (Case Branch : LCOG - Eugene AAA)
Assessment
Services
Client : SQATEST , LOCAL Q
Add Multiple Services
Application Intensive
Job Retention
Group Activities (Re
Detail
ServiceType:
Generic Needs Assessment
WARNING 1354
Service Date must be with in the current EI Assessment Start and End Dates for this client. Click OK and enter a valid date. If you do not recall the date range then erase this data and review EI Assessment Tab.
OK
ut of Region
Ref. Date:
00/00/0000
Training Type:
Description:
Comments:
Enter EI Service Date
hsdca00 (0000)
12/18/2004 04:50 pm

Task List

Oregon

Employer 1

Name **SQATEST, LOCAL Q**

Street **11 LOC2234AL SQATEST Remote test**

City **Salem** State **OR** Zipcode **97303**

Telephone **(503) 305-5555 (H)**

Employee 2

Name **KARRICK, MARJORIE** Provider Number **604415**

Mileage Authorization per month: **0**

Task To Be Performed 3

Kitchen	● Clean the stove	○ Clean and defrost refrigerator
	○ Sweep and mop floors	○ Wash the dishes
	○ Empty the garbage	○ Wash the kitchen counters
Living area	○ Vacuum the floor	● Dust the furniture
Bedroom	○ Make the bed(s)	○ Change the sheets
	● Vacuum the floor	○ Dust the furniture
Bathroom	● Clean the sink/tub	○ Clean the toilet
	○ Mop the floor	
Shopping	● Do the grocery shopping	○ Run other errands
	○ Store food and supplies	
Laundry	○ Wash and dry clothes	○ Put away the clothes
Meals	○ Prepare Breakfast	○ Prepare Lunch
	○ Prepare Dinner	○ Prepare food for next day
	○ Assist with eating	
Bathing	● Stand by for safety	○ Assist with tub or shower
	○ Shampoo hair	
Grooming	● Personal hygiene (brushing, shaving, combing)	
	○ Assist with dressing	
Mobility	● Assist with ambulation	○ Assist with transfers
	○ Assist with range/motion	○ Assist with padding/position

DEPARTMENT OF HUMAN SERVICES

Human Services Bldg

SENIORS AND PEOPLE WITH DISABILITIES

SPD 598

File name
SQATEST, LOCAL Q

Client
SQATEST, LOCAL Q

Date sent
12/20/2004

Case number
GI5421

Prime number

Date of birth
10/25/1950

Program
D4

Branch Code
2011

Worker
Danka, Kurtis

Please continue on following page

Task To Be Performed (continued) 3

○ Night Care

◉ Medication Management**This read Medication, but printed Medical**

○ Bowel/Catheter/Continence Care

○ Special Needs

○ Special Diet

○ Hours Authorized Per Month

Environment 4

◉ Pets **This was up higher with no separation from Tasks**

◉ Smoking Preferences **so policy request it be identified in new section.**

Remarks 5

Signature worker Date

Signature employer Date