

Jeanette Burket

**Authorized Signature**

**Number: SPD-IM-06-054**

**Issue Date: 8/23/2006**

**Topic: OA NAPIS Change Summary**

**CORRECTED**

**Subject: Oregon ACCESS Version 21.2**

**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 type="checkbox"/> Children, Adults and Families     | <input type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers        | <input type="checkbox"/> Other (please specify):              |

**Message:**

**Oregon ACCESS Version 21.20**  
**NAPIS Change Summary – 6/16/2006**

The following is a list of changes to the Oregon ACCESS application for the 21.20 release scheduled on June 16, 2006.

Three primary areas of the ACCESS application are being modified for this release with changes related to the NAPIS program. The Call Module and OAA Service Summary screen both have minor enhancements to the usability and functionality. Several larger changes have been made to the OAA Batch screen, however the fundamental “look and feel” of the screen should remain.

The changes are summarized as follows:

*If you have any questions about this information, contact:*

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**Oregon ACCESS Version 21.20 NAPIS Change Summary –**  
**6/16/2006**

The following is a list of changes to the Oregon ACCESS application for the 21.20 release scheduled on June 16, 2006.

Three primary areas of the ACCESS application are being modified for this release with changes related to the NAPIS program. The Call Module and OAA Service Summary screen both have minor enhancements to the usability and functionality. Several larger changes have been made to the OAA Batch screen, however the fundamental “look and feel” of the screen should remain.

The changes are summarized below:

## Call Module:

Relation to Client defaults to 'Self'

Select Reasons allows multiple reasons to be listed

Mandatory fields were changed. Marked in Blue

- The Call Module screen has been modified to automatically default the value of the “Relation to Client” field as “Self” when a new call record is being created. This will cause the client name and phone number to automatically pre-fill based on the caller name and number. If the user changes the relationship, they can then edit the client name and number as appropriate.
- Multiple call reasons (1 or more) can now be added for a single call record. Reasons can be added/removed by using the “Add” and “Remove” buttons next to the “Select Reason” box on the Call Module screen.
- The mandatory fields on the Call Module screen have been modified – all mandatory fields are marked in a **blue** font.

- The old “Client Age 60 or Above” field has been removed and “Track for OAA/OPI” has been added in its place.
- The Call Count report has been modified to allow for multiple call reasons and still report on reasons for calls, total number of calls, and unduplicated persons.

## OAA Batch:

The **Route** button will allow you to change clients to a different route or to change the order of delivery

The Create button allows the user to create a new batch/roster.

The screenshot shows the OAA Batch application window. At the top, there are input fields for Roster #, Site (FRIENDS OF ESTACADA), District (Clackamas), Service (Home Deliv. Meals {#4}), Qualifier, Month (May), and Yr (2006). Buttons for Find, Create, and Clear are on the right. Below this is a 'List' section with a table showing Roster #, Service, and Qualifier. A 'Filter' box on the right allows filtering by Qualifier (Standard), Provider (ESTACADA, COMMUNIT), and Route. Below the filter is a 'Roster' table with columns for SI.No, Client Name, DOB, Qualifier, and Units. At the bottom, there are buttons for Modify Roster, Repeat Units, Complete, Print, Export, Route, Delete, View All Batches, Save, Close, and Help. A 'Comments' button is also present in the bottom right corner. The 'Other Units/Guests' box at the bottom right allows entering Eligible Units (1.00), Inelig. Units (2.00), and New Guests (3.00). The total units are shown as 119.25.

Roster #	Service	Qualifier
114419	Home Deliv. Meals {#4}	

SI.No	Client Name	DOB	Qualifier	Units
1	ROBERTO ROBERTO	06/17/36	Standard	12.00
2	JOHN JOHN, KATHRYN.	12/10/28	Standard	15.00
3	JOHNMANN, PAUL	04/13/20	Standard	7.50
4	JOHNAM, JOHN	09/05/27	Standard	14.00
5	JOHNAN, DARLENE	06/19/45	Standard	11.75
6	JOHNELL, FRANCES	09/01/35	Standard	21.00
7	JOHN, AUDREY	12/28/41	Standard	22.00
8	JOHNF, DOROTHY	01/29/22	Standard	5.00
9	JOHNIER, VIOLA	11/15/19	Standard	7.00

Other Units/Guests	
Eligible Units:	1.00
Inelig. Units:	2.00
New Guests:	3.00

Total Units: 119.25

Filter box allows the user to filter for qualifier, Provider and Route.

The Delete button will allow you to delete a roster.

The Other Units/Guests box allows the user to enter eligible and ineligible units and new guests.

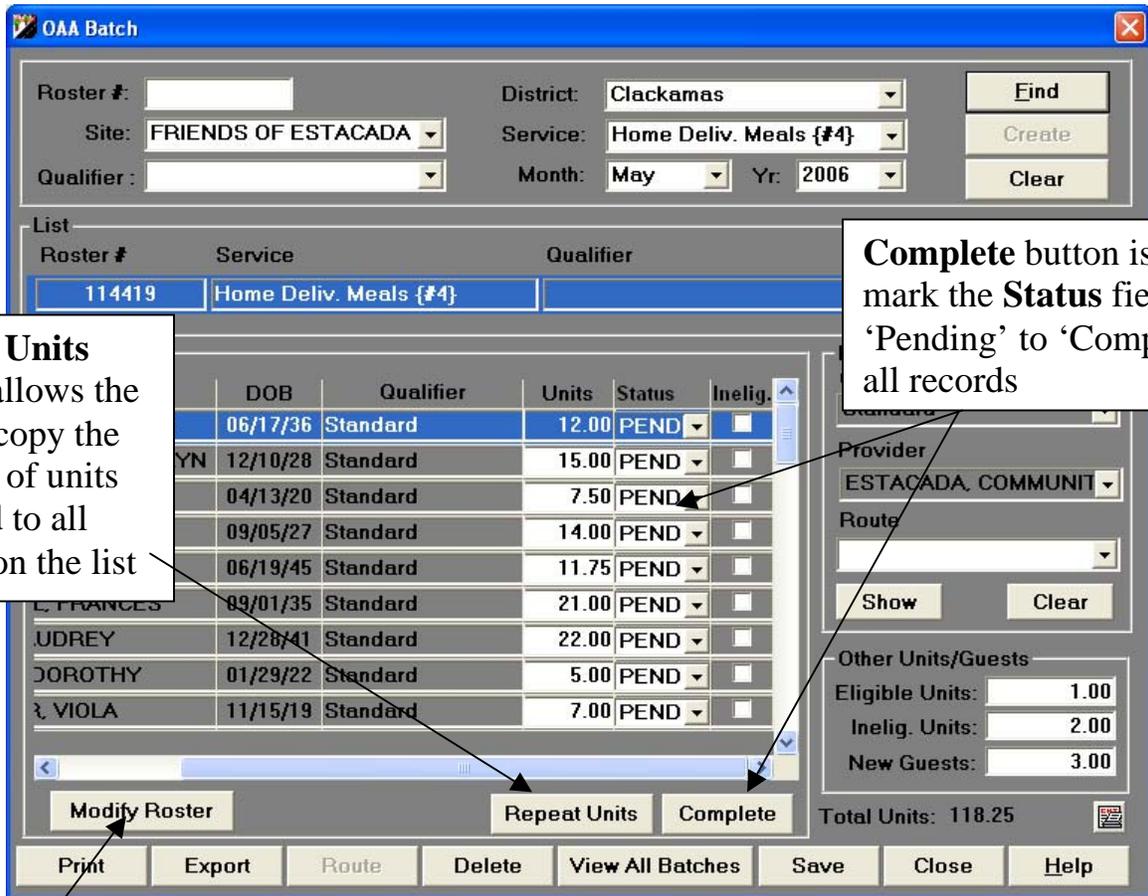
Comments Button allows the user to read comments entered from the RAIN web application

Several modifications have been made to the OAA Batch screen and screens that open off of this main screen. These changes are outlined in the next several pages:

- A “Create” button has been added to this screen. After searching for a batch (selecting desired criteria and clicking the “Find” button), if no matching record is found, the “Create” button becomes enabled. Clicking this button will create a new batch and pull the appropriate individuals onto the new roster record. The roster can be further modified (individuals can be manually added or removed) by using the “Modify Roster” button discussed below.
- The “Other Units/Guest” group box allows users to enter Eligible, Ineligible, and Total Guest Counts. This group box is specific to a provider and appears only after a provider is selected from the filter (or when there is only one provider on the batch in focus).
- A new “Filter” group box was created. The user can filter by Qualifier, Provider, or Route by selecting the desired information and clicking the “Show” button. The “Clear” button clears the filters. The filter allows the user to only view the subset of individuals on a particular roster who meet the specified criteria. If only one selection is available (for example the batch only has one provider or qualifier) the filter will be automatically preset and not be able to be changed.
- DOB and Qualifier was added to the Roster display area where the list of individual on a particular batch/roster display.
- A “Total Units” display was added to the bottom right of the screen. It is the sum of individual, eligible guest, and ineligible guest units.
- A new “Route” button was added that allows the users to reassign a group of people from one route to another or to change the order of persons on a particular route. This button is enabled only after a specific route is selected from the filter area (see below).
- A new “Delete” button was added that deletes the batch in focus (similar to the existing “Delete” button on the “View All Batches” screen. Units assigned to individuals will not be deleted, however batch records that are deleted will no longer show in the resulting batch searches or on the “View All Batches” screen.

- A new “Comments” icon will be enabled if comments have been added by a provider by using the new RAIN web application. This will open a screen where the user can view the respective comments.

[OAA Batch changes continued on the next page...]



**Repeat Units** button allows the user to copy the number of units selected to all clients on the list

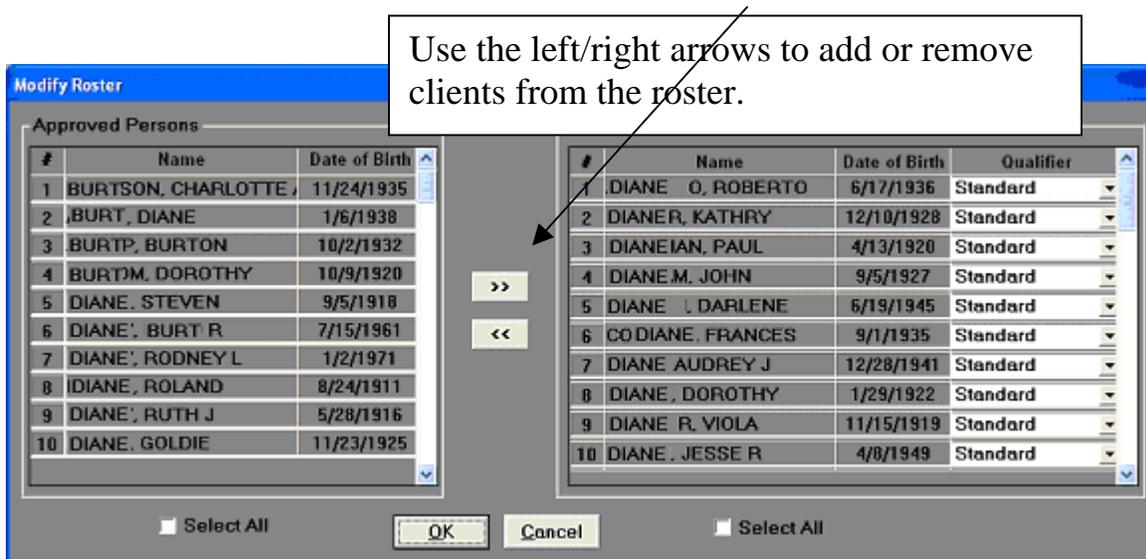
**Complete** button is used to mark the **Status** fields from 'Pending' to 'Complete' for all records

The **Modify Roster** button will allow you to Add or Delete Approved persons from your selected Roster

- A “Modify Roster” button was added that opens a “Modify Roster” screen described below. This screen can be used to manually add/remove individuals from the roster.
- A “Repeat Units” button was added that allows the user to easily specify the same number of units for all individuals in a batch.

When the cursor is placed in a specific box with units and this button is clicked, the units will be copied to all individuals on the roster.

- A new “Status” column was added to the display area where individuals display on a roster. The new RAIN application will allow providers only to update records where the status is “Pending” or where a new batch has been created and no units have been entered (i.e. the batch was created but the units are still zero). Once units have been entered and the records is saved with a “Complete” status, the units will not be able to be modified through the RAIN web application.
- A “Complete” button was added that will change all the records on a batch to “Complete” status and the will no longer be able to be edited by the RAIN application users (even the ones that are zero).



- A new “Modify Roster” screen has been created that allows users to add/remove individuals from a batch list. The box on the left shows a list of persons eligible for the batch and the box on the right shows those currently on the batch. The user can use the arrow keys to add or remove individuals from the batch/roster.

- If a qualifier was not specified when the batch was created, the user can specify the qualifier by selecting it from a dropdown for each individual (only relevant qualifiers will display). If a particular individual received units with a specific qualifier in the past 60 days, the system will default to that value, otherwise it default to “Standard”.
- One or more individuals can be selected and added in a single step by clicking the desired rows and then using the arrow keys. The “Select All” checkbox will select everyone in the list to add or remove from the batch.

Seq	Client Name	Addr Line One Text
1	JOHN. JOHN	91091 SE VIOLA Road.
2	JOHN. ERNIE	91591 SE VIOLA Road.
3	JOHN. VIOLA	91291 SE VIOLA Road.

Reassign Entire Route

From: BORING

To: [Dropdown]

Up

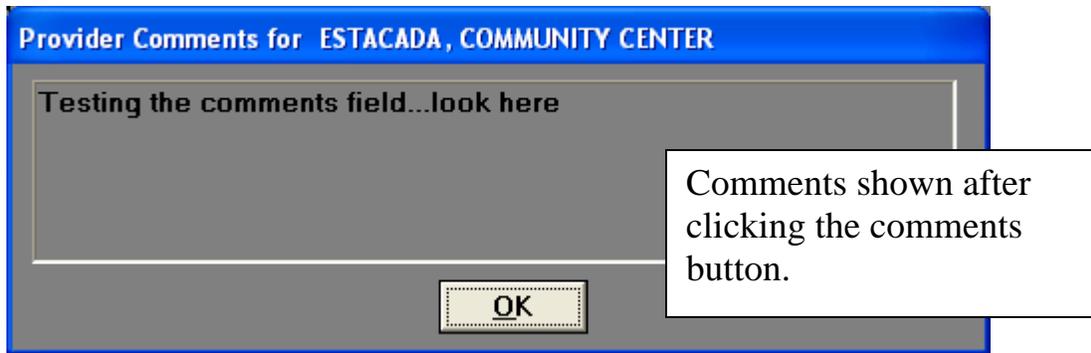
Down

Delete

Save

Close

- The “Route Reassignment” screen allows users to move all individuals from one Route to another (however not one individual at a time). It also allows the user to remove an individual from a route, or change the sequence of persons on a route.



- As part of the new Oregon RAIN web application, providers who have access to update batch unit information may also add comments to the batch. From the main batch screen, if comments have been entered, an icon will be enabled. When the user clicks this icon the “Provider Comments” screen will open and display the entered comments. The comments are read only from this screen and serve to provide additional miscellaneous information only.

Batch #	Date	Site Name	Service	Qualifier
114407	05/2006	CITY OF LAKE OSWEGO	Info. and Assistance {#13}	
114408	05/2006	CITY OF LAKE OSWEGO	Medication Management {#40}	
114409	05/2006	CITY OF LAKE OSWEGO	Personal Care {#1}	
114410	05/2006	CITY OF LAKE OSWEGO	Personal Care(CEP) {#1a}	
114411	05/2006	CITY OF LAKE OSWEGO	Respite {#30-4}	
114412	05/2006	CITY OF LAKE OSWEGO	Transportation {#10}	
114413	05/2006	CITY OF LAKE OSWEGO	Utility Asst. {#80-3}	
114414	05/2006	CITY OF LAKE OSWEGO	Wellness Education {#40-3}	
114415	05/2005	CITY OF MOLALLA	Access to CG Services {#16}	Standard
114416	08/2014	FRIENDS OF ESTACADA	Congregate Meals {#7}	
114417	08/2014	FRIENDS OF ESTACADA	Home Deliv. Meals {#4}	
114419	05/2006	FRIENDS OF ESTACADA	Home Deliv. Meals {#4}	

- The “View All Batches” screen remains unchanged, however if the user double clicks a row on the list, the batch will be selected and put into focus (previously the user had to select a row and click “Close”, which will still work as well).

## OAA Service Summary – OAA Service Qualifier Screen

The screenshot shows a software window titled "OAA Service Qualifier For Info. and Assistance [#13]". At the top, it displays "Authorized Units : 0". Below this is a "List" section with a dropdown menu currently set to "Standard" and two buttons: "Add" and "Remove". The "Actual Units" section contains a table with two columns: "Date(mm/yyyy)" and "Actual Units". The table has three rows of data. An arrow points from a text box to the "06/2005" entry in the date column. To the right of the table are "Add" and "Remove" buttons. At the bottom of the window are "OK" and "Cancel" buttons.

Date(mm/yyyy)	Actual Units
04/2005	17.00
05/2005	18.00
06/2005	21.00

Date field changed to Month and Year only. Only one entry per month can be made

- The OAA Service Qualifier screen has been modified so that the date field is now in the format of month and year only (and duplicate records for the same month cannot be entered). Previously the date field was in the MM/DD/YYYY format.