

Seniors and People with Disabilities

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Authorized Signature

Number: SPD-IM-06-076

Issue Date: 9/21/2006

Topic: Systems Issues

Subject: Oregon ACCESS Patch 21.30

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 checked="" type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers | <input checked="" type="checkbox"/> Other (please specify): Oregon ACCESS Users outside of SPD/AAA |

Message: The Patch 21.30 includes the following:

New Forms

Updated Forms

Minor Fixes (response to Field suggestions and Service Desk Tickets)

OAA/NAPIS Client Billing Module

Please read the attachments for more information.

If you have any questions about this information, contact:

Contact(s):	Service Desk		
Phone:	503-945-5623	Fax:	
E-mail:	dhs.servicedesk@STATE.OR.US		

OA Release V21.30

Forms, Misc OA changes, and New Client Billing Module

Oregon ACCESS Forms Support

SPD is currently working on the Oregon ACCESS forms project that is broken into two phases (this release contains the second phase). Both phases are focused on updating several forms that are needed for eligibility and case management. The following is a brief summary of the changes that have been made to the system and the forms for phase two. Many of the changes have been based on form revisions that have gone through the SPD Forms Committee.

In addition to the forms, the packets were reviewed and restructured.

Overview on Updates to Forms

(Forms are listed as they appear on the Forms Module in Oregon ACCESS)

Packets

- The previous Packet 1 Community, Packet 2 Nursing Home, and Packet 3 GA have been replaced with a new format that is based on benefits.
- The new Packet format now includes the core forms necessary to complete an Initial Application or Re-Determination.
- The Packets contain the following forms:

New Application:

Medicaid Only:

- SDS 539A, SDS 539R, DHS 1005, DHS 2099, SDS 9001

Medicaid and Food Stamps:

- SDS 539A, SDS 539F, SDS 539R, SDS 491, DHS 1005, DHS 2099, DHS 3400, SDS 9001

Medicaid and Services:

- SDS 539A, SDS 539R, SDS 914, DHS 1005, DHS 2099, SDS 9001

Medicaid, Food Stamps and Services:

- SDS 539A, SDS 539F, SDS 539R, SDS 491, SDS 914, DHS 1005, DHS 2099, DHS 3400, SDS 9001

QMB Only:

- SDS 539C, SDS 539R, DHS 1005, DHS 2099, SDS 9001

Re-Determination:

Medicaid Only:

- SDS 539C, SDS 539R, DHS 2099, SDS 9001

Medicaid and Food Stamps:

- SDS 539A, SDS 539F, SDS 539R, SDS 491, DHS 2099, DHS 3400, SDS 9001

Medicaid and Services:

- SDS 539C, SDS 539R, DHS 2099, SDS 9001

Medicaid, Food Stamps and Services:

- SDS 539A, SDS 539F, SDS 539R, SDS 491, DHS 2099, DHS 3400, SDS 9001

QMB Only:

- SDS 539C, SDS 539R, DHS 2099, SDS 9001

DHS 210A Notice of Information or Verification Needed

- New form in Oregon ACCESS

NOTE: In a future release, the SDS 210A will replace the DHS 210A.

SDS 458A Financial Planning Title XIX (CAPS Service Summary Leaf/Facility)

- When generating this form, a new Pop Window appears that enables the effective dates for Partial Month, Full Month, and Ongoing Month to be entered. The option to complete the Full Month and Ongoing Month using the data within Oregon ACCESS or manually is available.
- Correction to data pulling to the form

SDS 458I Financial Planning Title XIX (Instn Tab/Institution)

- Same changes as the 458A

SDS 462A Medical Assistance Denial

- New form in Oregon ACCESS
- Basic case related data auto fills for the Primary Applicant and persons identified as Applying on the Case Overview Tab for Medical

DHS 462S Medical Assistance Denial through Seniors and People with Disabilities

- New form in Oregon ACCESS
- Basic case related data auto fills for the Primary Applicant and persons identified as Applying on the Case Overview Tab for Medical

SDS 514 Request for Exception

- Revised to match the new Forms Server Version
- Increased Comment fields on the 514 Details to accommodate more data on the forms
- The Types of Providers will auto fill the main type not the sub categories. Example: In-Home will auto fill and the user will need to manually check if Independent Choices, Spousal, and Adult Day Services are applicable.

SDS 538A Referral to Social Security Administration

- Updated to pull both Residential and Mailing address to Section 2 (5)

SDS 539A Application Form

- Revised to match the new Forms Server Version
- Refer to SPD-IM-06-18 for information on how to complete the Ethnicity and Race section of the form

SDS 539C Medicaid Redetermination/ Medicare Savings Program Application

- Updated the 539C to include the Medicare Savings Program Application

SDS 620 Request for Presumptive Medicaid Disability Decision

- New form in Oregon ACCESS
- Side bar auto fills and other areas must be manually entered

SDS 7208M Medicare Advantage Plan Election

- Updated to match the Forms Server Version
- Side bar auto fills other areas must be manually entered

DHS 2099 Authorization for Use & Disclosure of Information

- Updated to current version

Miscellaneous Oregon ACCESS (Provider, Call Module, OAA Batch, and Remote)

The upcoming release will contain a variety of updates and “fixes” to the Oregon ACCESS system.

- On the Provider Maintenance Screen in Maintain Provider Module a new option was added for the Credential Level. The new option is “Restricted Credential”. Please continue using the current process for determining the Credential Level. The HCW Policy staff will release instructions for using the new Credential Level. The new code was added to ensure its in place for when the updated policy instructions from HCW Policy staff are provided.
- Several Error Messages that are generated with in Oregon ACCESS have been modified for clarification.

***NOTE:** If it is necessary to contact the Service Desk due to an error message please alert them of the number located on the top left hand-side of the pop up window.*

- The Report “Follow-Up Call Report” for Call Module will now sort the information by Worker Name (Alphabetically), Date (Chronologically), then Reason for Call (Alphabetically).
- Per field request the OAA Batch Module was updated.
 - The roster will sort alphabetically by last name when screen refreshes
 - Service status will default to 'PEND' for new batch
 - The year is defaulted to the new year on the batch

- The order of years in the drop down has changed
- The batch number will appear on the Monthly Transaction
- When the year is entered the cursor will jump to the next field
- A new step-by-step procedure document is attached that describes the process for “Changing Passwords” in Remote Oregon ACCESS. If applicable please review the attached document. This primarily affects users who have a desktop and a separate laptop.

New Client Billing Module for OAA/NAPIS

The Module will allow client billing to be completed within Oregon ACCESS for the Older American Act/Oregon Project Independence Programs.

For more information refer to the upcoming Information Memorandum/User Guide that will be sent out by the OAA/OPI Policy Unit.

Security Reminder:

A new group has been added (OAA Client Bill Update). If you have staff that need rights to use the new OAA client billing function, please work with your local sub-administrator to have them added to the new group.

If you use a laptop in Oregon ACCESS, please review the following procedure for changing your password. It is important that you follow these steps so your password does not become out of sync between consolidated and remote. If you use 2 computers - a "Desktop" and a "Laptop", it is very important that you take the following steps when changing your password in Oregon ACCESS:

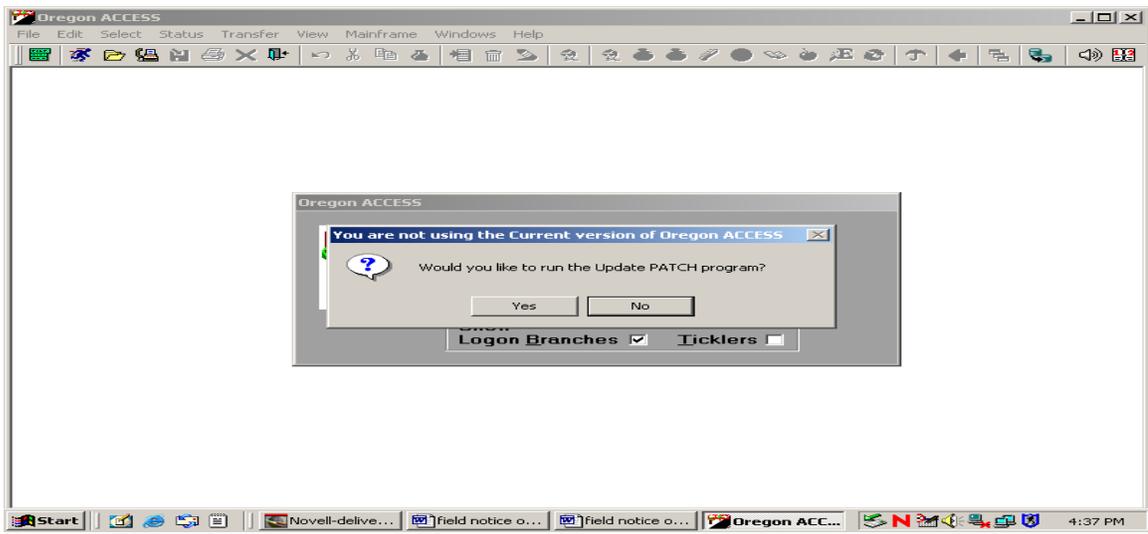
1. Make sure your laptop is docked and connected to the network. This is what you do when you are going to Checkin/Checkout cases from/to your laptop. Please do that before going to any further steps.
2. Log into your "Laptop" computer. This is very important. Do not log into your "Desktop" computer. Your laptop is the computer you "dock" and "undock" to take out for field visits.
3. Click "Consolidated"
4. Now you are ready to change your password. If it has expired, you will be prompted to change it. If it has not yet expired, you can go to "Select-->Maintain Password"
5. After you change your password, it will change on your "Laptop" (Remote) and "Desktop"(Consolidated). You are done.

***Note:** The Mainframe Password must be updated separately. The Password must be the same for the Mainframe and Oregon ACCESS.*

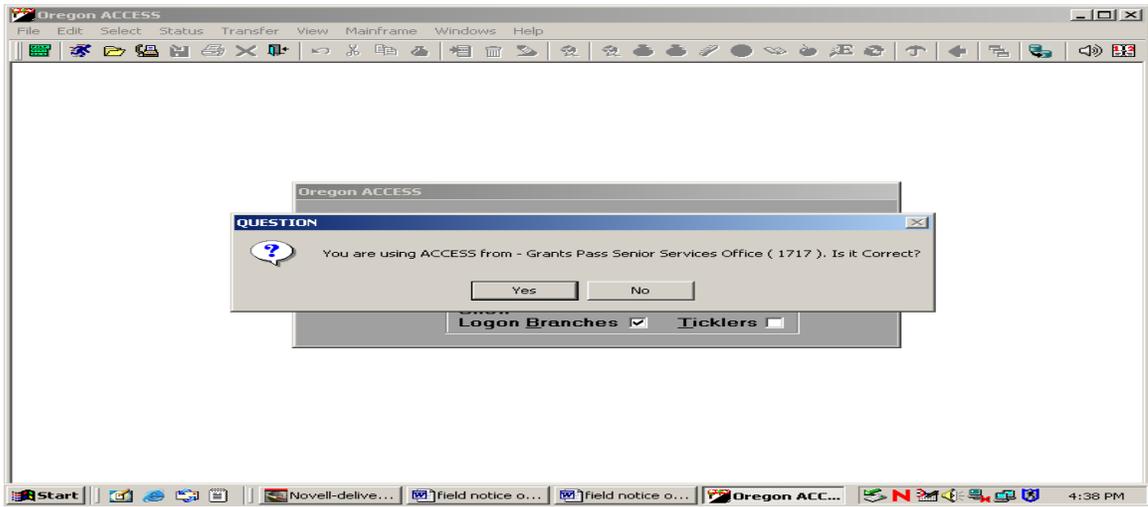
How do I get the Patch?

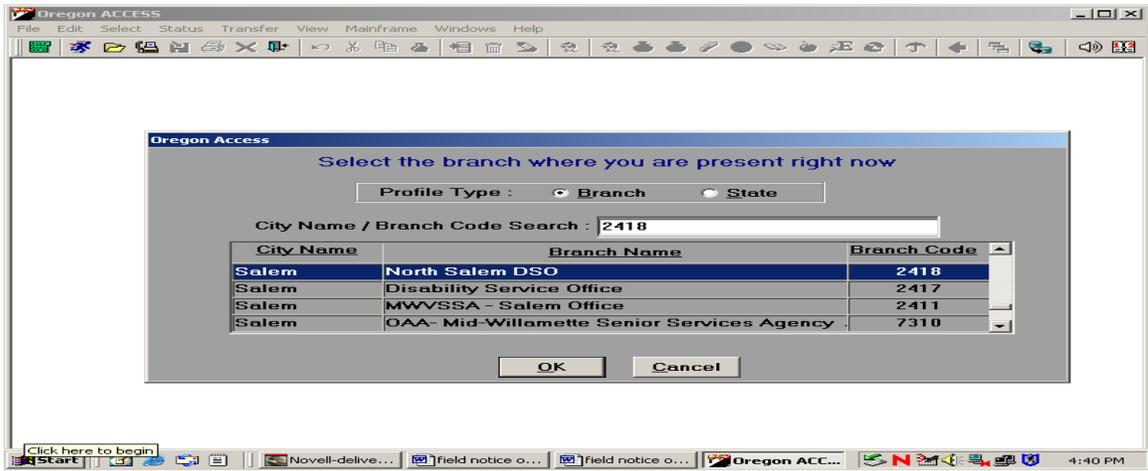
- **Existing Oregon ACCESS User:**

On or after 9/25/06 a user will get the following message when they log into Oregon ACCESS. Click “Yes” this will take you to the next message.



This message is confirming your default branch office. If it is correct click “Yes”, if not click “No” and enter the correct branch on the following screen.





Then click “OK”. The Patch will begin to install the Oregon ACCESS Patch Setup screen will appear click “Next”. The setup process will begin, when it is finished the Oregon ACCESS log on screen will appear. Log back into Oregon ACCESS.

- **New or Re-installed Oregon ACCESS User:**

On or after 09/25/06 a New or Re-installed Oregon ACCESS user will need to use the usual setup files located at N:\OACCESS. This will install the latest Oregon ACCESS Version.