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Authorized Signature
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Topic: Systems Issues

Subject: Oregon ACCESS Release 21.50 - Friday, May 4, 2007.

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

**Message:** Oregon ACCESS Release 21.50 will be released on the evening of May 4, 2007. The new version will be available to staff on Monday, May 7, 2007.

**The release will require that staff check in all cases and log out by 5:00pm on May 4<sup>th</sup>. Oregon ACCESS will be unavailable from 5:00 pm Friday, May 4<sup>th</sup> until 6:00 am Monday, May 7<sup>th</sup>.**

Please note that the initial installation and initial synchronization may take longer than normal. Do not undock your laptop until the entire installation and synchronization process is completed.

Please see the attached description of the changes and enhancements included in the release.

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

<b>Contact(s):</b>	OIS Service Desk		
<b>Phone:</b>	503-945-5623	<b>Fax:</b>	
<b>E-mail:</b>	<a href="mailto:Dhs.servicedesk@state.or.us">Dhs.servicedesk@state.or.us</a>		

## **Oregon ACCESS Release 21.50** **Available 05/07/2007**

Oregon ACCESS Release 21.50 will be released on the evening of May 4, 2007. **The release will require that staff check in all cases and log out by 5:00pm on May 4<sup>th</sup>.** The new version will be available to staff on Monday, May 7, 2007. This release contains the following changes, which are described in further detail below:

- Upgraded version of the Oregon ACCESS/Mainframe Client Index (CI-FIND) interface which includes the following:
  - Support for Departmental move to Federal Race/Ethnicity data standards
  - Support for the mainframe Client Index system data Verification and Source code identifiers
  - Improved handling of “Alias” Client Index data
  - Increased number of rows returned when the Oregon ACCESS person search results in a search of CI data
- Support for the transition of the Spousal Pay Program from a state general fund program to a program included in Oregon's Title XIX Home and Community-Based Services Waiver.
- Improvements to the Remote Synchronization process
- Miscellaneous changes and fixes

### **Improvements in the Oregon ACCESS/Mainframe Client Index (CI-FIND) interface**

Several years ago, a process to support the Oregon ACCESS/CI interface was built. Though CI has been modified over the years to include additional features, the programs used by Oregon ACCESS have not been upgraded. As a result, Oregon ACCESS was unable to take advantage of the improvements in CI and users had to complete some CI functions on the mainframe system.

As part of release 21.50, Oregon ACCESS has been modified to use the most current versions of the CI interface programs. This upgrade provides increased functionality for Oregon ACCESS users. The move to more current versions of the CI interface program will allow the following:

- Support for Departmental move to Federal Race/Ethnicity data standards
- Support for the mainframe Client Index system data Verification and Source code identifiers

- Improved handling of “Alias” Client Index data
- Increased number of rows returned when the Oregon ACCESS person search results in a search of CI data

*Support for Departmental move to Federal Race/Ethnicity data standards*

The Federal Office of Management and Budget (OMB) declared standards regarding the collection of Race and Ethnicity data several years ago. The department is currently making changes in several of its information systems to support the transition to the new standards. Oregon ACCESS and several mainframe systems will be moving to use the new standards effective May 7, 2007. Among the affected mainframe systems are Client Index System (CI-FIND), the Client Maintenance System (CMS), and the Food Stamp Information System (FSMIS).

The OMB regulations require that a recipient be able to declare multiple race designations along with an ethnicity designation. The standard code values are as follows:

Ethnicity:

- Hispanic or Latino
- Not Hispanic or Latino
- Unknown/Undeclared

Race:

- American Indian/Native Alaskan
- Asian
- Black or African American
- Native Hawaiian or Pacific Islander
- White
- Unknown/Undeclared

Oregon ACCESS has been modified to allow staff to collect the standard data. Race/Ethnicity data entry fields may be accessed at several points in the Oregon ACCESS application. In all areas, the data entry fields are accessible by clicking on a button and bringing up a data entry window. The fields are accessible on the following tabs: Person Details, Screening/Person Tab, Case/Person Tab.

Oregon Access [ Office : Cascades West Council of Governments ( 2211 ) Profile Type :- Branch DB : access\_test\_central ]

File Edit Select Status Transfer View Mainframe Windows Help

Persons Detail for : TEST M CASE

Person Detail

Last Name: CASE First Name: TEST M.I: M

Sex: Male  Female  DQB: 05/05/1950 Marital Status:

SSN: -- Prime Nmbr: Race:

Language Spoken: Status: Active

Address: Tele Nmbr: ( ) -

Ext:

Benefits Summary CIS Reg Show Calls Alias Clear

TEST's Role(s) and Case Name(s)

Role	Case Name	Br Cd	Status	Wkr

Select Assign New Assign Existing Vjw Person Search

Last Name of the Person

Click on the ellipsis button to bring up the Race/Ethnicity data entry window

Oregon Access [ Office : Cascades West Council of Governments ( 2211 ) Profile Type :- Branch DB : access\_test\_central ]

File Edit Select Status Transfer View Mainframe Windows Help

Screening for TEST M CASE ( Screening Branch : Cascades West Council of Governments )

Person Address FS Financial Medical Spouse / Contact Nutr Risk / ADL Referral

Detail

Last Name: CASE First Name: TEST M.I: M

Birth Date: 05/05/1950 Sex: Male  Female  Disabled

SSN: -- Prime Nmbr: Blind

Marital Status: Race/Ethnicity:

Live in: Lang Spoken:

Telephone: ( ) - Ext: Alt Format:

Current Loc: Initial Inquiry MMA?  Yes  No Urgent:

Benefits Requested

Medical:  Food Stamps:  Services:  Cash Assistance:  OPI:

VA Benefits  Other:

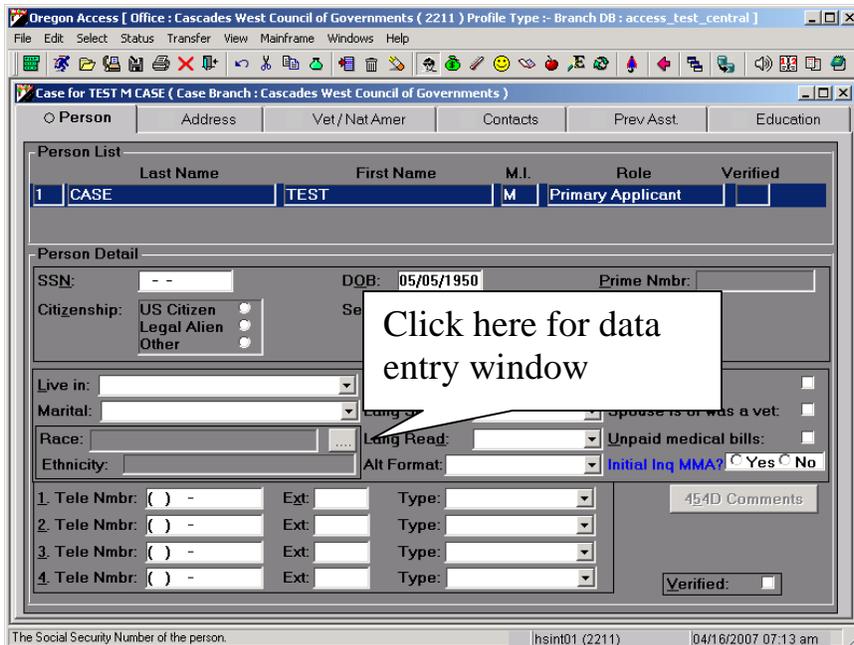
Caller Name: Address: Screening Date: 04/16/2007

Line 2: City / State / Zip: Screener: Tester, Tester T ( hsint01 )

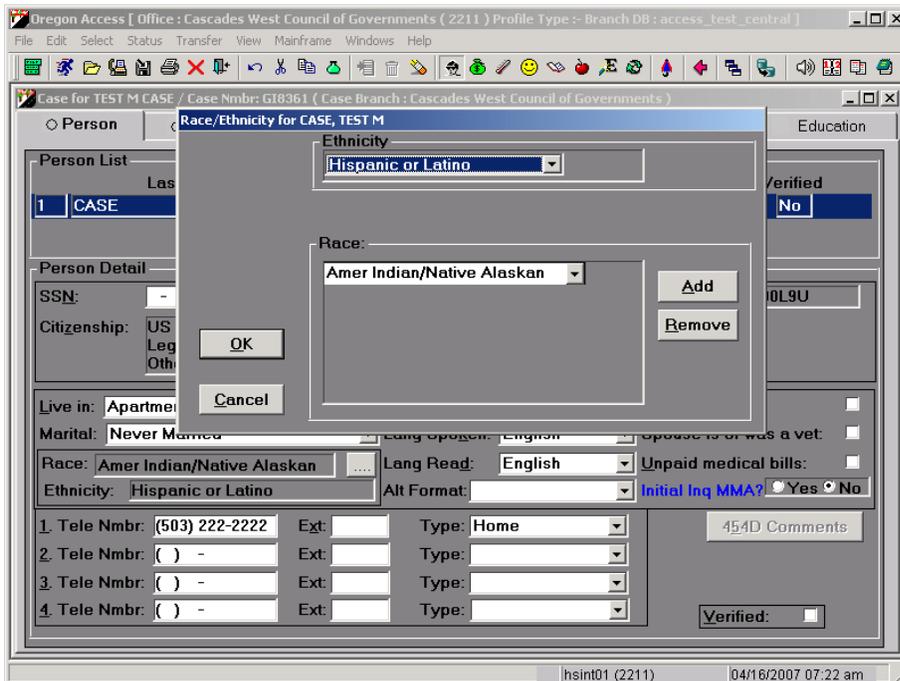
Telephone: ( ) - Ext: Branch: 2211

|hsint01 (2211) |04/16/2007 07:13 am

Click here for data entry window

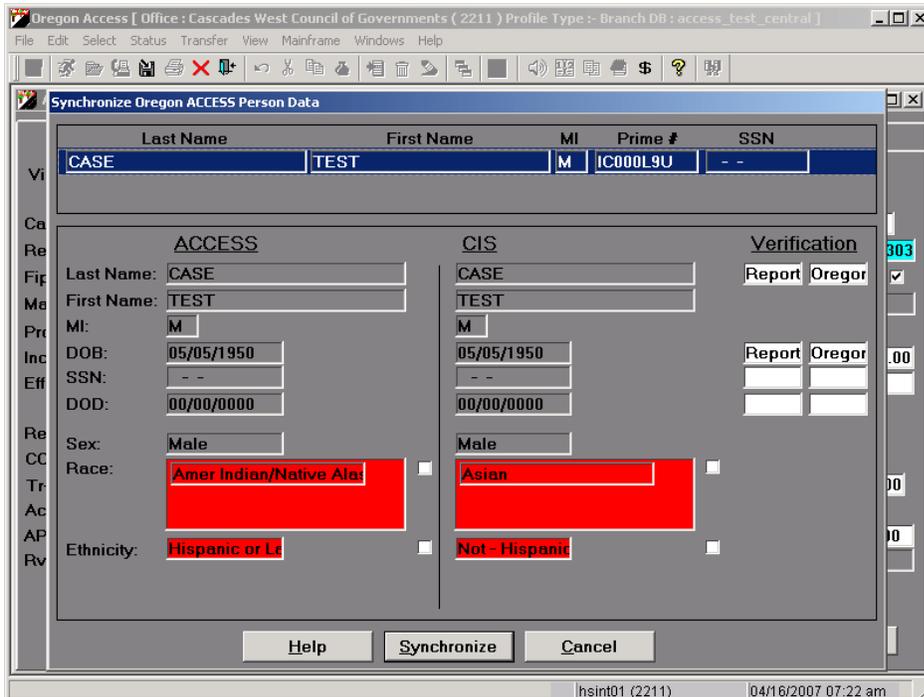


The Race/Ethnicity data entry window looks like this. Users must select Race and Ethnicity data once they enter the window.



Differences in Race/Ethnicity data between Oregon ACCESS and the mainframe CI system will need to be reconciled before mainframe integration can be completed. When attempting to complete a CMNEW or CMS integration action, the system will note discrepant data and present the user with a data

synchronization screen. The user must mark which data to use and synchronize the data before proceeding with integration.



A conversion will be performed to populate the new Ethnicity fields and move to the new Race values. Oregon ACCESS currently stores Race data for both Medicaid and OAA clients. For Medicaid clients, the current application only stores Race data. For OAA clients, the application stores both Race and Ethnicity data. The Medicaid and OAA Race/Ethnicity data is currently stored separately. As part of the conversion, both data stores will be consolidated into one. The conversion logic the Department has chosen is as follows:

- If the current Race code is “Hispanic”, we will convert the Ethnicity to “Hispanic or Latino” and the Race to “Unknown”
- If the current Race code is anything other than Hispanic, we will convert the Ethnicity to “Not Hispanic or Latino” and the Race to the corresponding Race code as follows:
  - American Indian/Native Alaskan → American Indian/Native Alaskan
  - Asian → Asian
  - Black, Not of Hispanic Origin → Black or African American
  - Native Hawaiian or Pacific Islander → Native Hawaiian or Pacific Islander
  - Other → Unknown or Undeclared
  - White, Not of Hispanic Origin → White

- If no Race or Ethnicity data is present, we will leave both the Race and Ethnicity fields blank.
- If Oregon ACCESS has both Medicaid and OAA Race data, and they are different, both values will be stored as the application now allows for multiple Race designations.

*Support for the mainframe Client Index system data Verification and Source code identifiers*

In 2002, the Client Index (CI) system was modified to include Verification and Source code identifiers for recipient person data. Since that date, each piece of person data in CI has carried an indicator telling if the item has been verified by an outside source (e.g. birth certificate) or is simply being reported by the client as accurate data.

This information is displayed on the CI Person Alias Update screen.

```

WCIW031C                Person Alias/Update                04/16/2007 07:42 am

Fast path                EB
. Pref Last CASE                1st TEST                MI M TTL                V/R A CM
. Legl Last                1st                MI TTL                V/R
. SSN 296-52-9985 V/R V BE . Prime IC000L9U . Sex M . Race I . Cit X V/R
. DOB 05/05/1950 V/R A CM . DOD N                V/R                . Lang EN . Prnt
                                                Scroll ALL

Dsg Last                First                MI Title

Dsg Prime Designated Othr per Status

Dsg SSN Othr per IPV Bendex Emp Wages UC Invalid

Last chg: 04/16/2007 Oper ID: HSINT01 Src: CM Status: . Lock N
70000I Ready
F1=Help F2=Asgn Prime F3=Exit F5=Refresh F6=Fast Path F7=Bkwd F8=Fwd F9=Save
F13=Access 1 F14=Access 2 F15=Manl F18=Copy F21=Prsn Merge F24=Prsn Split

```

There are three valid V/R indicator codes.

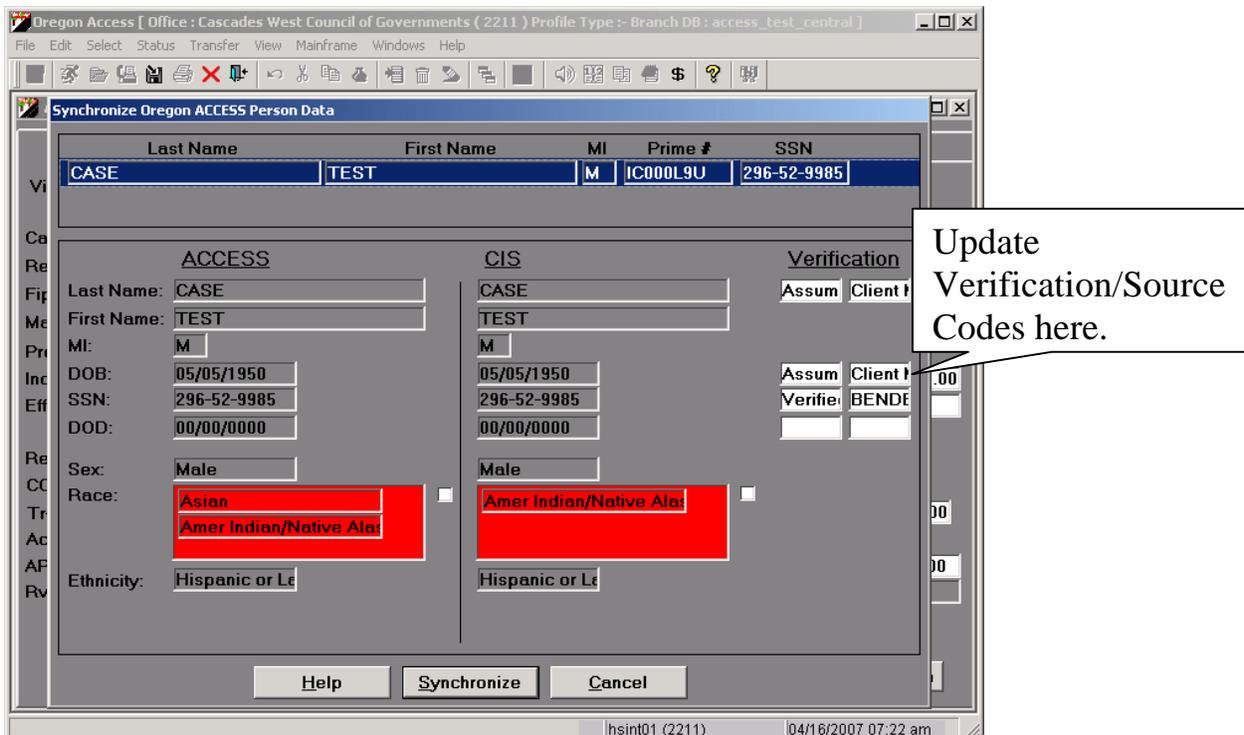
- V = Verified. The data has been verified by an outside source
- R = Reported. The data has been reported by the client as accurate information
- A = Assumed Verified. The data is assumed verified because it comes from an external information system whose program rules require that the data be verified. This code will be used primarily for certain pieces of data coming from the CMS and FS systems that must be verified. Because the V/R indicator has not yet been added to the CM and FS systems, workers have no way to indicate whether an item is verified or reported when entering data

into those systems. Therefore, the Assumed Verified code will display on CI for select data items fed from the CM and FS systems.

Along with the V/R indicator, is a source code. This indicates the item or document that the worker used in determining whether the information is considered Verified or Reported. See SPD-IM-02-054 for additional information on these changes.

Oregon ACCESS was never modified to allow staff to maintain the Verification and Source code data. As a result, staff were required to complete some CI update actions on the mainframe. Oregon ACCESS will now allow staff to maintain the Verification and Source code data and properly handle CI person data.

The Verification and Source code data is available on the CI Data Synchronization screen. Each data item that carries the indicators will display the current mainframe values when the screen first comes up. If staff have updated a piece of person data in the body of the Oregon ACCESS application, they will be required to synchronize that data to CI if there is a discrepancy. Staff may update the Verification and Source code data at this time.



Remember, that the CI Verification and Source code data operates under a hierarchy. Data may only be updated according to the following rules:

- Verified information can only be updated by data marked as verified.
- Assumed verified information can be updated by data marked as either verified or assumed verified.
- Reported information can be updated by data marked as either reported, assumed verified, or verified.

The Oregon ACCESS synchronization screen will operate according to the above rules with one additional rule. Assumed Verified is not available for staff to select as a verification code because only CMS and FSMIS system updates may assign a Verification code of Assumed Verified. Error messages will display in Oregon ACCESS if a user is attempting to update data outside the rules.

#### *Improved “Alias” data handling*

The mainframe CI System identifies person data as “Primary/Designated” or “Alias” data. Data marked as Primary/Designated is data that is determined to be valid at the current point in time. Alias data is data that was previously associated with the person, either in error or because something regarding the person has changed. For example:

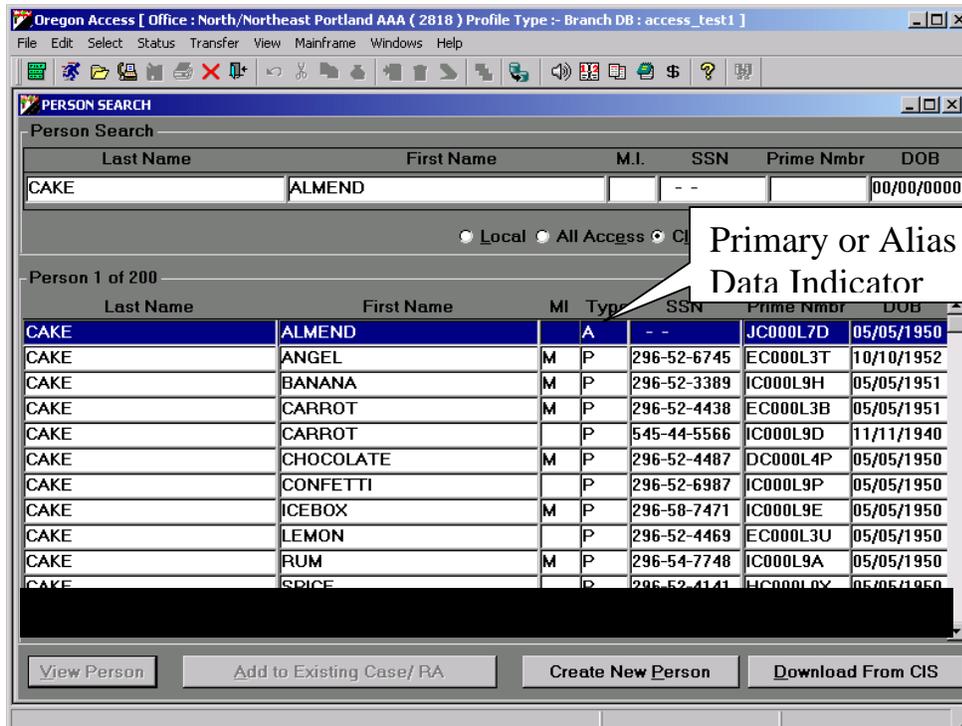
- If the person’s SSN was originally entered incorrectly but was later corrected, both SSNs will be stored with the person record. The correct SSN will be marked as the Primary/Designated SSN and the incorrect SSN will be marked as an Alias SSN.
- If a client first became known to DHS as Jane Doe, but later got married and changed her name to Jane Smith, both names will be stored with the person record. Jane Smith will be marked as the Primary/Designated name and Jane Doe will be marked as an Alias name.

Oregon ACCESS has not previously handled CI Alias data properly. In the past, using the SSN example above, if staff conducted an Oregon ACCESS/CIS person search using the incorrect/alias SSN, the system would return a match because the SSN was found on CI. However, Oregon ACCESS was unable to detect that the entered SSN was Alias data, and would allow the user to download the alias data into Oregon ACCESS. This caused problems in integration and resulted in duplicate person records in CI.

The upgraded Oregon ACCESS/CI interface programs are able to detect alias data. Now, when a user conducts a search using alias data, the system will return the record from CI, but will download the primary data associated with the record into

Oregon ACCESS. This should result in fewer data problems between the two systems.

The Oregon ACCESS/CI search window has also been modified to indicate if a name is a Primary/Designated or Alias Name. The indicator works similarly to Alias indicator on the mainframe CI WEBM,FIND screen.



*Increased number of rows returned when the Oregon ACCESS person search results in a search of CI data*

When an Oregon ACCESS Person Search results in a search of CI data, the system will now return 100 rows. This will give users a larger pool of person records to review before creating an Oregon ACCESS record. The hope is that by giving users a larger results set to review, fewer duplicate person records will be created.

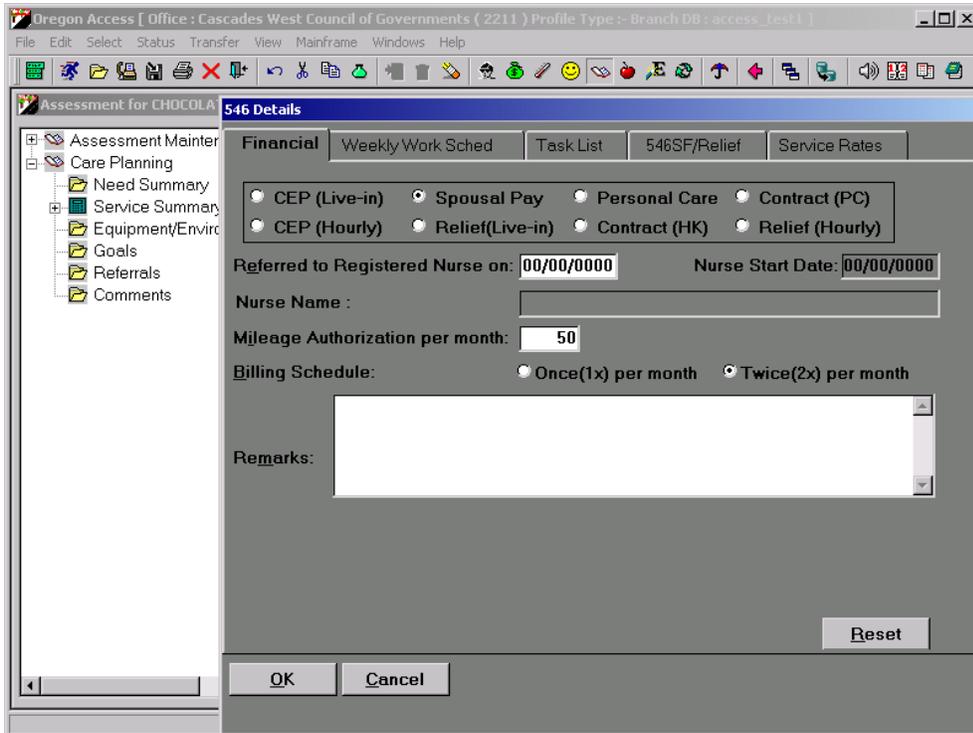
In future releases, we hope to take advantage of more of the options available to us in the Oregon ACCESS/CI interface programs.

### **Spousal Pay and Oregon ACCESS Pay-In Worksheet Modifications**

The spousal pay program is transitioning from a general fund program to one covered under the Home and Community Based Care waiver. A Policy Transmittal describing this change will be released shortly. Because the spousal

pay services will now be considered waived services, spousal pay service costs must be included in the client pay-in calculation along with other waived service costs.

To support this change, the Oregon ACCESS Pay-In worksheet has been modified to include costs associated with Spousal Pay service plans. Spousal Pay service plans are those for which the provider's 546 type is marked as Spousal Pay.



Remember, per rule, Spousal Pay providers are only paid for ½ the authorized Self Management and 24 Hour Availability hours. Oregon ACCESS automatically adjusts the assigned Self Management and 24 Hour Availability hours per rule. The adjusted Spousal Pay hours will be used in the pay-in calculation.

### **Improvements to the Remote Synchronization process**

The Remote Synchronization process occurs in two parts. First, the Oregon ACCESS person/screening/case/CAPS data is synchronized. In a second process, the Oregon ACCESS provider data is synchronized. In the past, the Remote Synchronization window did not depict the provider portion of the synchronization process. Users would leave the synchronization window and undock the laptop before the provider synchronization was completed. The result was that some components could not be checked back in and would be “stuck” on the laptop because the synchronization process had been interrupted.

The Remote Synchronization window has been modified to depict the full synchronization process. The synchronization window will not indicate that synchronization is complete until the full process has been completed. **Staff must allow the full synchronization process to complete before undocking the laptop. Failure to do so could result in a loss of data on the laptop.**

### **Miscellaneous Fixes and Changes**

- The “Time Off” Section of the SDS 546SF no longer displays when the 546 Provider type is Live-In
- The Income selections on the SDS 539A will all display on both versions of the SDS 539A printed form - Application version and Recert Version. If any income types have been selected in the body of Oregon ACCESS, those will be marked on the SDS 539A Application version and all other types will display unmarked. The SDS 539A Recert Version will show all income selections unmarked.
- The SDS 540 form has been updated to display a new web address, referenced in the static text on page two of the form.
- Several changes have been made to the NAPIS/Billing components. Information on these changes will be released in a separate communication.