The following steps must be followed each time a user does a 'Person Search' from the Main Menu page in Oregon ACCESS. Searching in Oregon ACCESS utilizes the Client Index (CI) database. The CI database is the Department's official person registry and contains more client records than the Oregon ACCESS database. If the person is not found in CI, the user will then be able to search the full Oregon ACCESS database.

These steps are required in order to reduce the number of duplicate person records that are created. <u>A new record should only be created after performing a complete search.</u>

When searching, use the following steps:

- When searching by SSN, if the SSN is found, check to be sure it is the correct person;

- When searching by name, use the first three letters of the first name and the first three letters of the last name (i.e. BEC, JOH). This will display a list of potential matches, even if the name is misspelled;

- If the person is not in the list, try using the date of birth (DOB) in addition to the name as described above;

- If the person is found, but has incorrect information, such as a misspelled name, incorrect SSN, or incorrect DOB, do not create a new record. The incorrect information can be corrected much easier and faster than merging duplicate records;

- If the person is not found, click 'No Match -> Search in OA' to search in Oregon ACCESS.

- The 'Search Status' field indicates which system the currently displayed results are from. This will display as:
  - o 'CI' when CI results are displayed;
  - o 'OA' when OA records are displayed; and,
  - o 'Idle' when the search has not been initiated.

Person Search						
Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
SPD	NINE		- -		00/00/000ι

Sounds like: ☐ (CI Only)   Search Status: CI   Search in CI   Clear

- If the person is still not found, create a new record.

Person search scenarios with a description of how Oregon ACCESS will route users:

- Search scenario #1: Person is found in CI and there is a registered Oregon ACCESS record associated to the CI person.
- Search scenario #2: Person is found in CI, but there is no registered Oregon ACCESS record associated to the CI record.
- Search scenario #3: Person is not found in CI.

Search Scenario #1: Person is found in CI and there is a registered Oregon ACCESS record associated to the CI person. *(This means that there is an Oregon ACCESS record that has the same CI number as the CI record you selected. This connection is made during the Oregon ACCESS registration process).*

In this scenario, the **View Person** button will be enabled when users click on the person on the search return screen. The availability of this button indicates that there is a registered Oregon ACCESS record associated with the highlighted CI record.

Person Search

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
SPD	NINE		- -		00/00/0000

Sounds like: ☐ (CI Only)   Search Status: [CI]   Search in CI   Clear

Person 1 of 200   Prev

Last Name	First Name	MI	Type	SSN	Prime Nmbr	DOB
SPD	NINE	M	P	- -	TIA00L1K	05/01/1950
SPD	ONE	M	P	- -	TIA00L1C	05/05/1950
SPD	SEVEN	M	P	- -	TIA00L1I	05/05/1981
SPD	SIX	A	P	- -	TIA00L1H	06/01/1925
SPD	TEN		P	- -	TIA00L1L	05/05/1950
SPD	THREE	M	P	- -	TIA00L1E	09/01/1920
SPD	TWELVE	M	P	- -	TIA00L1P	05/05/1950
SPD	TWO	M	P	- -	TIA00L1D	01/01/1950
██████	████	M	P	██	████	08/15/1910
██████			A			03/18/1923
██████		D	P			03/18/1923

Next

[**View Person**]   No Match -> Search in OA   Not Found in OA -> Create Person

Download/Reg from CI   Add to Existing Case/ RA

When the user clicks on the [View Person] button, they will be taken to the Person Details window for this person. If the user would like to return to the search results window, they may click on the [Person Search] button in the Person Details window.

Search Scenario #2: Person is found in CI, but there is no registered Oregon ACCESS record associated to the CI record.

In this scenario, after users click on the person in the search return list, the user may download the CI record to Oregon ACCESS by clicking on the [Download/Reg from CI] button.

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
SPD	EIGHT		- -		00/00/0000

Sounds like: ☐ (CI Only)   Search Status: [CI]   Search in CI   Clear

Person 1 of 200   Prev

Last Name	First Name	MI	Type	SSN	Prime Nmbr	DOB	▲
SPD	EIGHT		P	- -	TIA00L1J	04/01/1962	
SPD	ELEVEN	M	P	- -	TIA00L1M	04/01/1958	
SPD	FIVE		P	- -	TIA00L1G	01/01/1900	
SPD	FOUR	M	P	- -	TIA00L1F	07/01/1965	
SPD	NINE	M	P	- -	TIA00L1K	05/01/1950	
SPD	ONE	M	P	- -	TIA00L1C	05/05/1950	
SPD	SEVEN	M	P	- -	TIA00L1I	05/05/1981	
SPD	SIX	A	P	- -	TIA00L1H	06/01/1925	
SPD	TEN		P	- -	TIA00L1L	05/05/1950	
SPD	THREE	M	P	- -	TIA00L1E	09/01/1920	
SPD	TWELVE	M	P	- -	TIA00L1P	05/05/1950	▼

Next

View Person   No Match -> Search in OA   Not Found in OA -> Create Person

Download/Reg from CI   Add to Existing Case/ RA

When the user clicks on the [Download/Reg from CI] button from the CI search results window, the system will perform a search of the Oregon ACCESS database, using the same search criteria that was entered to initiate the CI search.

Last Name	First Name	M.I.	SSN	Prime Nmbr	DOB
SPD	FIVE		- -	TIA00L1G	00/00/000(

Sounds like: ☐ (CI Only)   Search Status: OA   [Search in CI] [Clear]

Person 1 of 1 - Potential OA Matches   [Prev]

Last Name	First Name	MI	SSN	Prime Nmbr	DOB	Status
SPD	FIVE		- -		00/00/0000	Active

[Next]

[View Person] [No Match -> Search in OA]   [Not Found in OA -> Create Person]

[No Match -> Download]   [Add to Existing Case/ RA]

If a match is found among the OA search results, the user may view the record by clicking
[View Person]. At that point, the user may register/re-register, as necessary. If no match is
found among the Oregon ACCESS search results, the user may click
[No Match -> Download] and continue with the download process. If the user
would like to search again, using different criteria, they may click the [Clear] button,
enter the new search criteria, and search again.

Search Scenario #3: Person is not found in CI.

In this scenario, the user has performed a CI search, but does not find a record that matches
the consumer's data.

The user may click ![No Match -> Search in OA]. The system will perform a search of the Oregon ACCESS database, using the same search criteria that was entered to initiate the CI search.

If the record is found in the OA search results, the user may click **View Person** to go to the Person Details Window. At that point, the user may register/re-register, as necessary.

If the person is not found in the Oregon ACCESS search results, the user may click the **Not Found in OA -> Create Person** button and create an Oregon ACCESS record.

CIS Registration Triggers

Oregon ACCESS 'forces' a CI Search when particular actions are taken. Users are navigated to a CI search in the following instances:
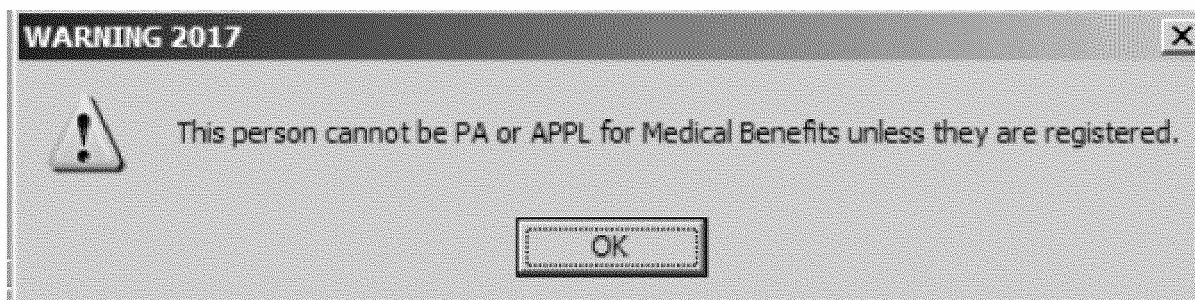
- When a user add a SSN to a person record.
- When the user attempts to enter the CA/PS system and the consumer is unregistered.
- When a user attempts to perform CMS integration and the consumer is unregistered.
- When a user changes the 'Applying For' status for the MED benefit to PA or Applying, and the consumer is unregistered.

When the above actions are taken, Oregon ACCESS will return a message asking the user if they would like to register the consumer.

WARNING 408

? This client is not CIS registered. Would you like to register this client now?

[Yes] [No]
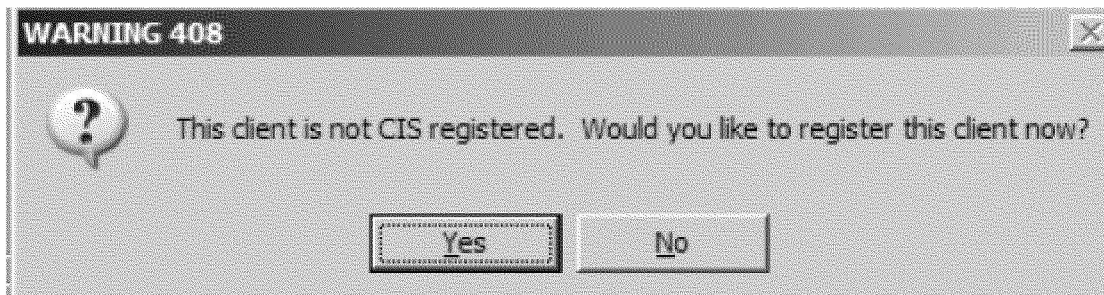
If the user selects [Yes] they will be navigated to the Registration screen.

If the user selects [No] they will receive a second message informing them that the action cannot be completed.

WARNING 2017

⚠ This person cannot be PA or APPL for Medical Benefits unless they are registered.

[OK]

Synchronization Screens

Since ONE and Oregon ACCESS are two different databases they must be updated individually. In order to ensure the person data in Oregon ACCESS is synchronized with the person data in ONE, the synchronization screen will be launched within the Oregon ACCESS. This screen will display automatically if a mismatch of information is found between ONE and the Oregon ACCESS record for the same person.

To resolve discrepancies, the user would check the box(es) next to the accurate consumer information, then select the Download From IE/ME button. This ensures the correct information displays in ONE and Oregon ACCESS.