

Expectations for Updating OA Information

Quick Reference Guide (QRG)

Purpose

To ensure the health and safety of consumers receiving Long-Term Services and Supports (LTSS) by Aging and People with Disabilities (APD), case managers must keep consumers' demographic information, such as addresses and phone numbers, current in Oregon ACCESS (OA).

Accurate information helps consumers remain eligible for LTSS based on their residence, receive timely agency notifications and continue accessing their medical benefits. This also helps the agency manage emergency situations more effectively in case of wildfires, natural disasters, and urgent facility move outs.

All references made to OA updates in this guide are meant for OA cases also found in the ONE system. This QRG does not apply to Oregon Project Independence-Medicaid or OPI-M cases not found in the ONE system.

Best Practice

Review demographic and OA case information with consumers when scheduling a home visit, while completing direct contacts, or during an office visit.

Data Sources

Consumer information must match in all the systems we use. This includes the ONE system and OA. Since ONE and OA are two different databases, they must be updated individually. Information such as income amounts are not synced to OA. Keep in mind demographic information flows from ONE to OA only.

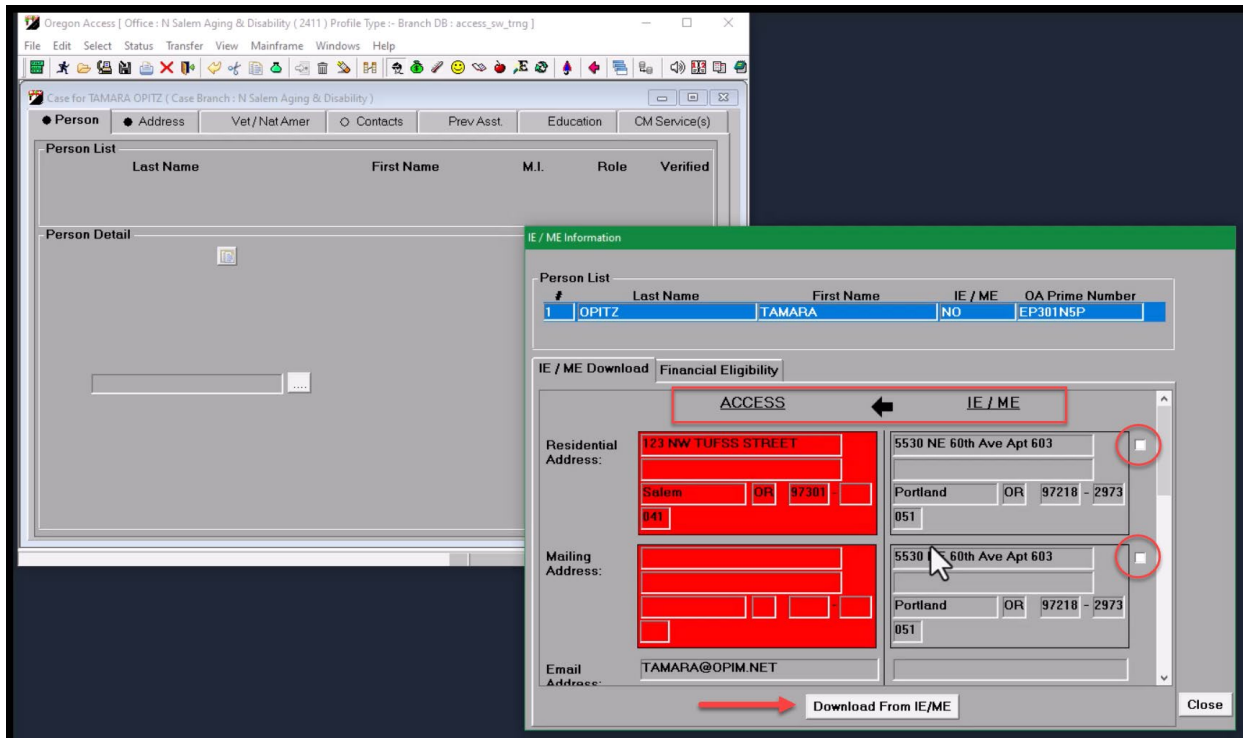
If there is a change needed, case managers should inform an eligibility worker or follow your local office process. Case managers have not been given rights to edit information in ONE.

When a change has been made in ONE, the next time the CM revisits the same case in OA, the system will prompt them to sync the new information

to OA through a synchronization screen. This is when the CM will take action.

Synchronization Screen

This screen will display automatically if a mismatch of information is found between ONE and the OA record for the same individual (see example below).



To resolve the discrepancies, the case manager should check the box(es) next to the accurate information, then select the Download From IE/ME button. This ensures the correct information is matching in both ONE and OA.

Address Tab

Case managers should also ensure no additional information gets entered into the address field. The address field should not be used as a place to store case notes.

Oregon Access [Office : Hillsboro APD (3411) Profile Type :- Branch DB : access_sw_trng] - [Case for NADIA GUSEV (Case Branch : Hillsboro APD)]

File Edit Select Status Transfer View Mainframe Windows Help

Person Address Vet/NatAmer Contacts Prev Asst Education CM Service(s)

Address List

	Address	City	Verified
1	1564 Summer St	Nowhere	No

Address Detail

Address: 1564 Summer St
Line 2: ~~HAS A LARGE DOG~~
City: Nowhere
State ZIP: OR 97555 - 5236

Address Confidentiality Program: ACP
Protected/Do Not Disclose Address: DND
Homeless/No Fixed Address: TEMP

FIPS Cnty Code:
Directions:
OAA/NAPIS: Is this address within the city limits? Verified:

Address Owners

Name	Use	
GUSEV , NADIA	Residence Address	<input type="button" value="Add"/> <input type="button" value="Remove"/>

Person Tab

The living situation listed in a case is important to update in OA as well. Open the case in OA and select the Person tab. Under Live in, select the drop down menu. This provides you with a number of options. Select the best option based on the consumers current living situation.

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File Edit Select Status Transfer View Mainframe Windows Help

Person Address Vet/Nat Amer Contacts Prev Asst Education CM Service(s)

Person List

	Last Name	First Name	M.I.	Role	Verified
1	GUSEV	NADIA		Primary Applicant	No

Person Detail

SSN: [] DOB: 05/09/1954 Prime Nbr: UN301N01

Citizenship: US Citizen (selected), Legal Alien, Other

Sex: Male (selected), Female

Disabled: Blind:

Live in: Apartment (selected) [dropdown menu open]

Marital: Apartment

Race: [] Ethnicity: []

Death Date: 00/00/0000 Stay in Oregon:

Lang Spoken: English Spouse is or was a vet:

Lang Read: Russian Unpaid medical bills:

Alt Format: [] CAM:

1. Tele N Homeless Type: Cell

2. Tele N House Type: []

3. Tele Nbr: () - Ext: [] Type: []

4. Tele Nbr: () - Ext: [] Type: []

Email: []

454D Comments

IE/ME: NO

Verified:

For questions contact:

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