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

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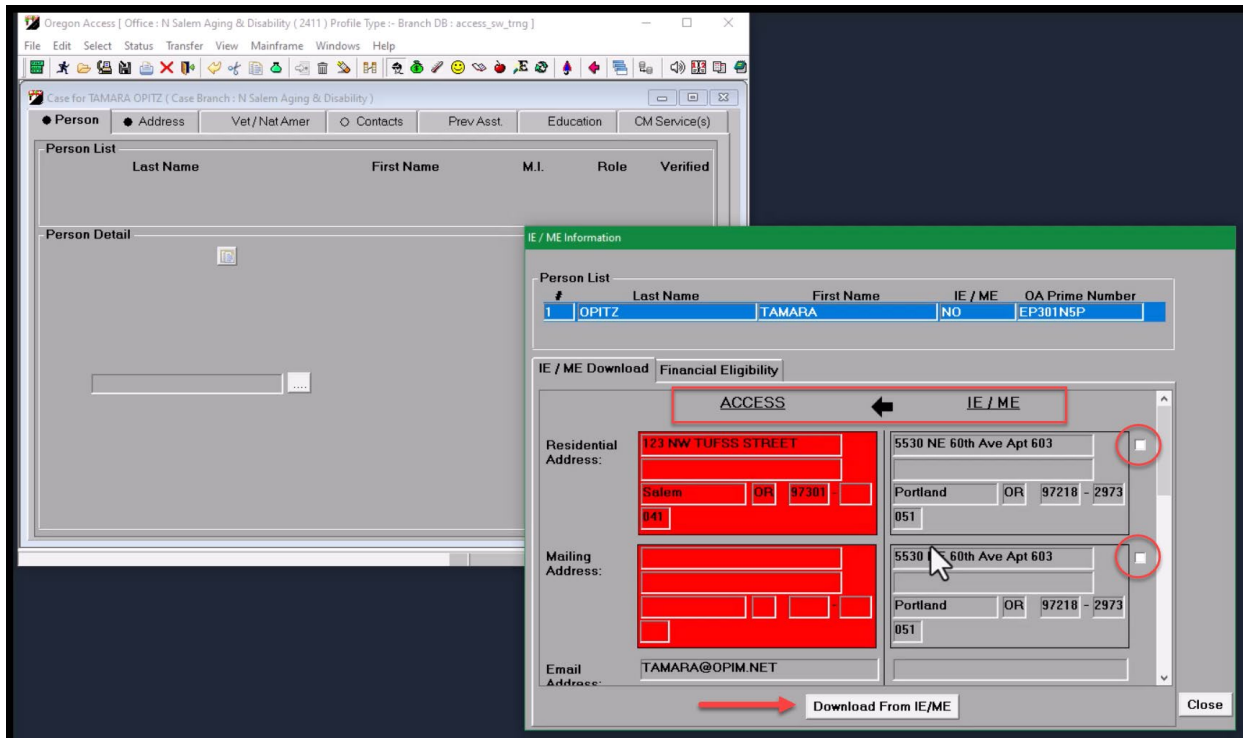
To resolve the discrepancies, the case manager should check the box(es) next to the accurate information, then select the Download From IE/ME button. This ensures the correct information is matching in both ONE and OA.

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.

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.

For questions contact:

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