

# Action Request Transmittal Aging and People with Disabilities



Ann McQueen

**Authorized signature**

**Number:** APD-AR-21-061

**Issue date:** 10/11/2021

**Topic:** Other

**Due date:**

**Subject:** Oregon ACCESS Branch clean-up for OPI and APD related to cost center assignment in OR PTC DCI

**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: Types A and B | <input type="checkbox"/> Health Services                                      |
| <input checked="" type="checkbox"/> Aging and People with Disabilities    | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs                        | <input type="checkbox"/> ODDS Children's Intensive In Home Services           |
| <input type="checkbox"/> County DD program managers                       | <input type="checkbox"/> Stabilization and Crisis Unit (SACU)                 |
| <input type="checkbox"/> Support Service Brokerage Directors              | <input type="checkbox"/> Other ( <i>please specify</i> ):                     |
| <input type="checkbox"/> ODDS Children's Residential Services             |   |
| <input type="checkbox"/> Child Welfare Programs                           |   |

**Action required:**

**OPI and LTSS service cases:**

- Oregon ACCESS (OA) cases must be transferred into the appropriate branch based on the service type the consumer is receiving.
- OPI consumers will be housed in the local AAA branch and LTSS consumers will be housed in the local APD branch within the district.
- LTSS and SPPC service cases will remain with the APD branches.
- OPI and APD case managers are responsible for ensuring their cases are housed in the correct branch.

For OPI services and APD eligibility only cases: ***These no longer need to be held in the APD branches for financial eligibility.*** OPI cases need to be transferred into the AAA's OPI branch.

- Priority cases for the branch clean-up are consumers who use a Home Care Worker (HCW.) This is an important step for OR PTC DCI to work correctly.
- Ongoing branch clean-up should be done on a regular basis to ensure service cases are assigned to the correct branch.

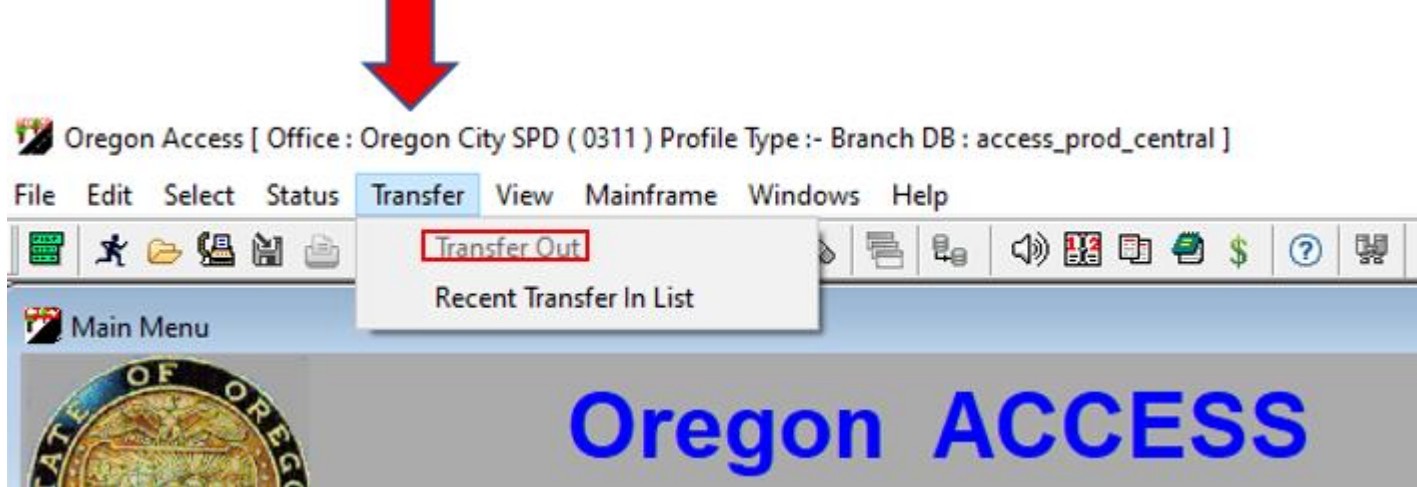
## OPI and APD Case Managers:

1. Identify your assigned cases in OA across all branches



The screenshot shows the Oregon ACCESS interface. At the top, it says "Oregon ACCESS" in large blue letters. Below that, there is a "Select Worker:" dropdown menu. To the right, there is a "Caseload" section with three radio buttons: "Branch", "All Access", and "All Access". The "All Access" radio button is selected, and a red arrow points to it from the right. Below the "Select Worker:" field, there are three radio buttons: "Case", "RA", and "Screening". Below these, there is a "Last Name Search:" text input field. At the bottom, there is a table header with columns: "Last Name", "First Name", "MI", "SSN", "Prime Nmbr", and "Branch".

2. Individually transfer cases into the correct branch.



The screenshot shows the Oregon ACCESS interface with the "Transfer" menu open. A red arrow points down from the "Transfer" menu item. The "Transfer" menu has two options: "Transfer Out" (highlighted with a red box) and "Recent Transfer In List". The interface also shows a "Main Menu" button and the "Oregon ACCESS" logo at the bottom.

3. Reassign your name and role.

Workers	
Role	Name
Eligibility	MF TRAINING ID, MF TRAINING ID
Service	MF TRAINING ID, MF TRAINING ID

OR

Workers	
Role	Name
Service	MF TRAINING ID, MF TRAINING ID
OPI	MF TRAINING ID, MF TRAINING ID

4. Narrate the reason for the transfer. “Case transferred to BRxxxx, consumer is receiving OPI services.” **or** “Case transferred to BRxxxx, consumer is receiving Medicaid LTSS.”
  
5. For consumers receiving services with a HCW, the cost center in OR PTC DCI must match the new branch. Follow business process [1.3.3 Process for Staff: Consumer Transfers to a New Branch](#) to ensure the branch and cost centers match. Please note, this includes making updates to ONGO.

**Reason for action:**

Service cases in OA must match with the cost center in OR PTC DCI. The OA branch where the case is held needs to correspond with the cost centers in OR PTC DCI for consumers who hire a HCW.

OA cases need to correspond to the correct branch for current and future systems to interact correctly.

**Field/stakeholder review:**     Yes     No

**If yes, reviewed by:**    APD district managers

*If you have any questions about this action request, contact:*

Contact(s): APD.Medicaidpolicy@dhsosha.state.or.us; OPI.Policy@dhsosha.state.or.us	
Phone:	Fax:
Email:	