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**Number: APD-IM-17-055**

**Issue date: 7/27/2017**

**Topic:** Long Term Care

**Subject:** Oregon Access Enhancements for July 31, 2017

**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"/> 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"/> ODDS Children's Residential Services          | <input type="checkbox"/> Other ( <i>please specify</i> ):                    |
| <input type="checkbox"/> Child Welfare Programs                        |  |

**Message:**

The following Oregon Access enhancements will be available for use on July 31, 2017:

**Modeling Across Assessments**

- *Please note that with this update, it is necessary to remove the ability to model hours on State Plan Personal Care plans. However, the provider can still be modeled.*

Oregon ACCESS CA/PS is being enhanced to allow modeling of Service Plan from a previous assessment. The intent of this change is to decrease the amount of time spent creating new Service Plans. The following steps must be taken in order to model a Service Plan from a previous assessment:

- Create the same Benefit type as the previous assessment.
  - *If a different Benefit type is selected (even if the change is going to or from APD-In Home and KPS-In Home), the system will not allow for modeling to occur.*
- Create a Blank Hours Segment and Services Segment (do not fill in any information, however invalidated segments will work).
- Click the Model button in the lower left corner of the Benefit Eligibility and Service Planning screen.

Assessment by:  
Tester6, Tester6

Referrals

Plan Summary

**Model**

Plan #	Begin Date	End Date	Status
1	00/00/0000	06/30/2018	Pending

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1				06/30/2018	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

- The modeling screen will look similar to the current modeling pop-up window. However, you will now be able to select an assessment that was previously completed. In the example below, the most current assessment is 6/6/17, however a previous assessment was also completed on 6/1/17.
- When a previous assessment is selected with the same assessment type and has In-Home hours associated with it, the "Model Hours" box may be checked. If the box is checked, the hours in the Hours Segment (and in some cases, also assigned to the providers) and providers from the previous assessment will be modeled. If the box is not checked, only the providers will be modeled.

### Model Services

Assessment Type	Assmt. Date	Create Date	End Date	Status
Title XIX	06/06/2017	06/26/2017	06/30/2018	Completed
Title XIX	06/01/2017	06/26/2017	06/30/2018	Completed

  

Benefit Type	Begin Date	End Date	Status
KPS-In Home	06/01/2017	06/05/2017	Ended

  

Hours No	Begin Date	End Date	Status
1	06/01/2017	06/05/2017	Ended

  

Plan No	Begin Date	End Date	Status
2	06/01/2017	06/05/2017	Ended
1	06/01/2017	06/05/2017	Invalid

  

Service Type	Provider	Begin Date	End Date	Status
In Home Care (HCW) Hour		06/01/2017	06/05/2017	Ended
In Home Care (HCW) Hour		06/01/2017	06/05/2017	Ended

**Model Hours**    OK    Cancel

Modeling hours works as follows:

### Hours Segment:

- The system will compare the “Assessed Hours” in the newly created Hours Segment and the “Allowed Hours” in the modeled Hours Segment in each ADL/IADL category. The lower of the two amounts will be inserted into the “Allowed Hours” section of the new Hours Segment.
- Any hours in the “Exception Hours” column will not be modeled, as the expectation is to review any exception hours for appropriateness.

### Services Plan Segment:

- If there is only one provider from the plan that is being modeled (an In-Home Agency counts as one provider, even though two lines are listed), the hours from the Hours Segment will be automatically inserted.
- If there is more than one provider from the plan being modeled, the hours will not be automatically inserted unless the consumer’s need levels have not changed between the two assessments.

### “Review Before” Date Entry

Oregon ACCESS CA/PS is also being enhanced to enter in the “Review Before” date when completing an assessment (instead of when creating the assessment), in order to help staff actively consider when the next assessment should occur. In the example below, please note the “Review Before” date is grayed out and therefore not editable:

The screenshot shows a web form titled "Assessment Wizard Entry". The form contains several input fields and dropdown menus. The "Review Before" field, which consists of two adjacent dropdown menus, is highlighted with a yellow circle and has a gray background, indicating it is disabled. Other fields include "Assessment Status" (Pending), "Type" (Title XIX), "SPL" (empty), "Worker" (Tester6, Tester6), "Assessment Date" (06/28/2017), "Valid Until" (06/30/2018), "Status Reason" (empty), and "Details" (empty text area).

Once the assessment is completed, you will have the opportunity to add the "Review Before" date (see example below). The latest the "Review Before" date can be is one year from the month the assessment was completed (i.e. if an assessment was completed in September 2017, the "Review Before" date can be no later than September 2018). However, if there is an anticipated change of condition, please enter in the appropriate date when the next assessment should occur.

- As a tip, please consider updating the Benefit end date in the Service Plan to match the "Review Before" date for Buckley Bill purposes.

Full Assessment Decision Point

Select Action

ASSESSMENT COMPLETE - Go To SERVICE PLAN

ASSESSMENT COMPLETE

Go To SPPC - State Plan Personal Care

Review Before: [Month] [Year]

Tester6, Tester6

I acknowledge that the assessment, treatments and comments are complete and accurate.

Next Cancel

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