

Oregon ACCESS Provider Search & Select Guide

Background

In order to provide all the information needed to meet the HCW Collective Bargaining Agreement and to manage the In-Home program, extensive changes have been made to the Oregon ACCESS (OA) provider information. A new provider database has been created. The new provider database is designed to be used by both Oregon ACCESS and mainframe systems. The database will be kept synchronized with the OMAP/MMIS mainframe provider files.

In making these changes, we wanted to minimize the impact on most field staff. While staff who maintain provider records will be using several new screens, staff who primarily use the Oregon ACCESS provider database when working on client case records will see minimal changes. This guide is designed to describe the changes that you might see in the following areas:

- Provider Search Function – How the new search function operates, including the search criteria hierarchy and search filters.
- “Placeholder”/Administrative Provider Search -- How to select “Placeholder” administrative providers such as: “Provider Name Unknown”, “Master Plan”, etc...
- Provider Overview -- How to access additional information about providers that display in your search return results by viewing the Provider Overview
- “See Codes” – How to access the “See Codes” help function available on the new search screens

Note: Please note that Provider SSN/TIN numbers have been “blocked” in this document for privacy reasons.

The Provider Search

The provider search windows have been slightly modified. While the majority of the search screen is the same throughout the Oregon ACCESS application, some search windows have additional items that are particular to the type of search being conducted on the screen.

The basic Provider search window looks like this. In it, you may search using the basic search criteria like name, SSN/TIN, OMAP number and provider type. You may also elect to do a “Sounds Like” or Soundex search. You can still use city to limit your search. You may elect to search for only active providers, or all providers.

Oregon Access [Office : Cascades West Council of Governments (2211) Profile Type : Branch DB : access_prod_central]

Provider Search

Search

SSN/TIN: OMAP/MMIS Prov Nbr:

Last Name: First: City:

Business: Type: All

Sounds Like: Active Providers All Providers

Placeholder Provider Search Clear

Result

Return to Original Search Previous Names

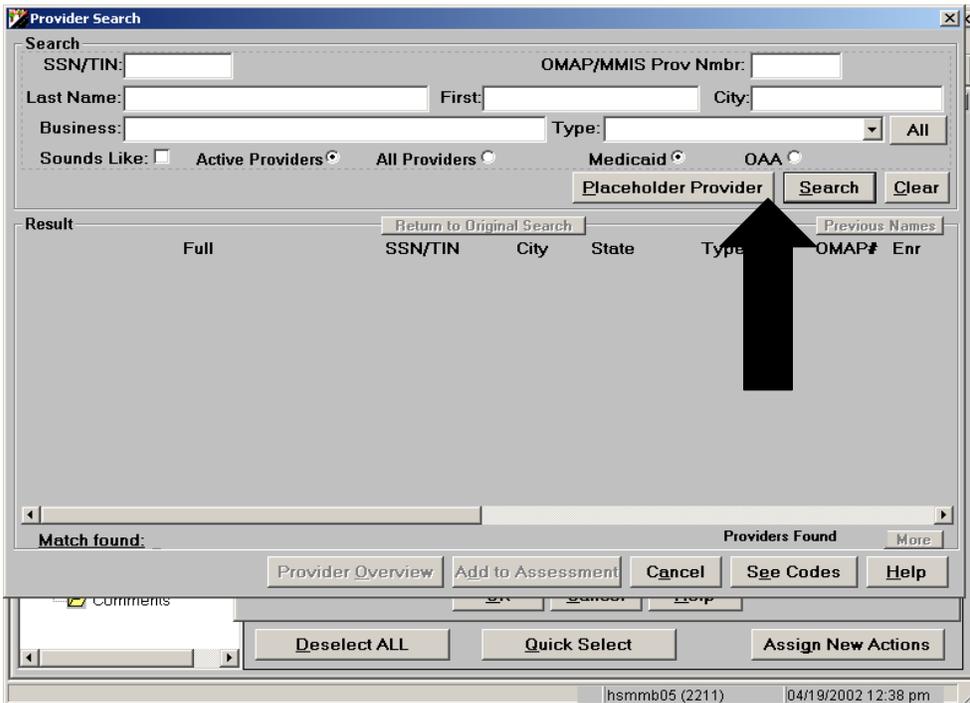
Full	SSN/TIN	City	State	Type	Previous Names	OMAP#	Enr
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Match found: Providers Found More

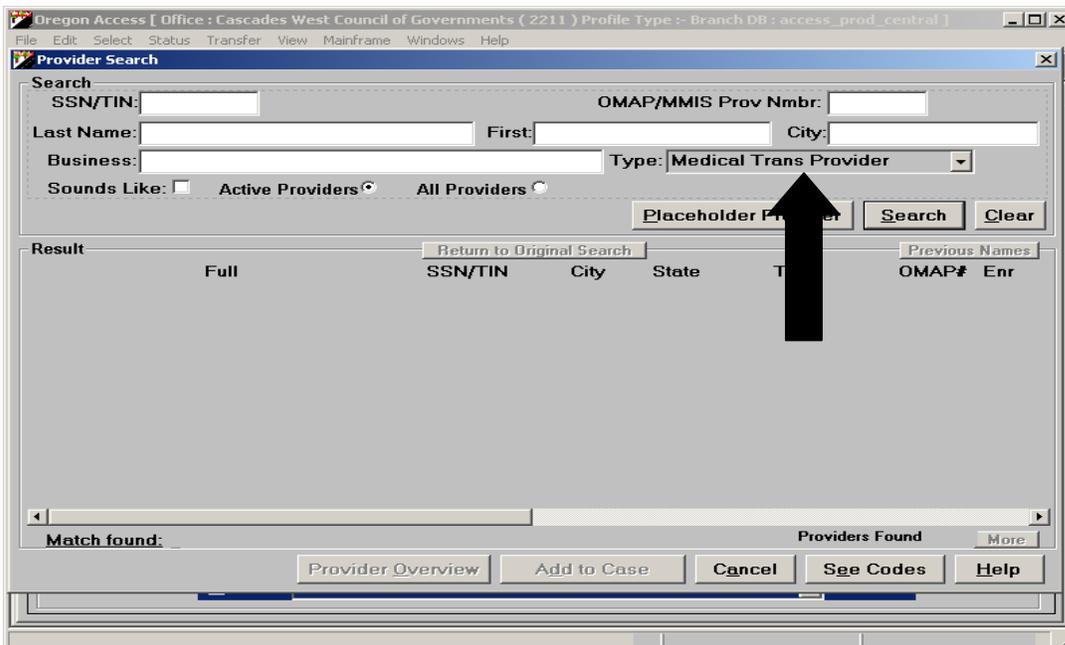
Provider Overview Add to Case Cancel See Codes Help

hsjdm00 (2211) 04/01/2004 10:46 am

The provider search in the CA/PS module looks a bit different. In addition to the search criteria fields in the basic provider search, the CA/PS search also allows you to search for Medicaid providers or OAA providers



On those screens for which only one provider type is generally “valid” for the screen, the search window will default to that provider type automatically. For example, on the Medical Transportation screens, the search screen will default to a provider type of Medical Transportation.



Search Criteria Hierarchy

The search function is designed to look for exact matches on OMAP/MMIS number and SSN/TIN, if they are entered. If no exact match is found, and

you have also entered some search criteria in the name fields, the system will return a list of names that most closely match what you entered. The search function has a built in search hierarchy.

OMAP/MMIS Number

At the top of the hierarchy is OMAP number. This means that if you enter an OMAP/MMIS number, the system will search for the exact match, regardless of other search criteria you may have entered. Notice how in the following search, we have entered a name, and an OMAP number. Because OMAP number was entered, the system looks only for that. It returns only the OMAP number match, and no name matches.

The screenshot shows a 'Provider Search' window with the following search criteria:

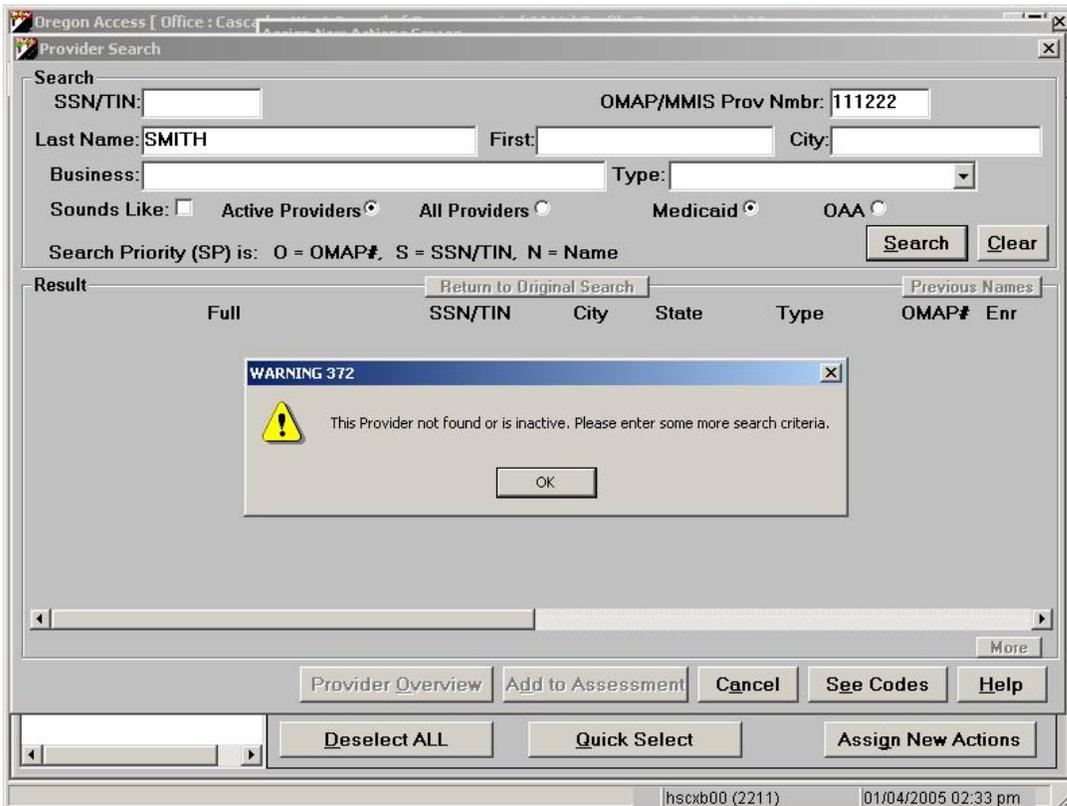
- SSN/TIN: [Empty]
- OMAP/MMIS Prov Nbr: 714828
- Last Name: SMITH
- First: [Empty]
- City: [Empty]
- Business: [Empty]
- Type: [Dropdown]
- Search Priority (SP) is: O = OMAP#, S = SSN/TIN, N = Name

The search results table is as follows:

Full	SSN/TIN	City	State	Type	OMAP#	Enr
JONES, ALICE M	[Redacted]	PORTLAND	OR	Homecare Worker	714828	AA

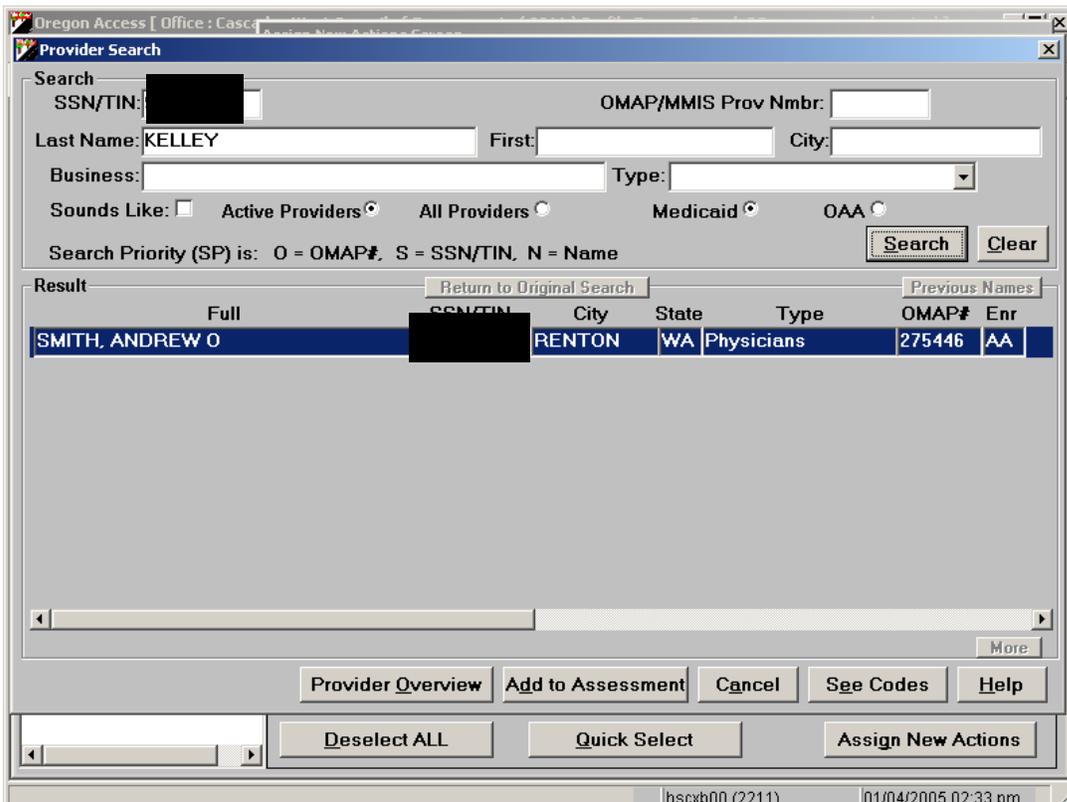
Buttons at the bottom include: Provider Overview, Add to Assessment, Cancel, See Codes, Help, Deselect ALL, Quick Select, and Assign New Actions.

In the following example, we are using the same criteria – OMAP NUMBER and Name. In this instance, however, no OMAP number match is found.



SSN/TIN

The second item in the search hierarchy is SSN/TIN. If you enter an SSN/TIN and a name, the system will search for an exact match on SSN/TIN and will not consider other search criteria you have entered.



Name Search

Finally, if no OMAP NUMBER or SSN/TIN is entered, and name is entered, the system will conduct a name search and look for all names that are like the name entered. It will also display the names that follow alphabetically. The search will return a maximum 100 names.

Full	SSN/TIN	City	State	Type	OMAP#	Enr
KELLEY, ANGEL ANNE	[REDACTED]	STANFLEED	OR	Homecare Worker	620384	AA
KELLEY, BETTY JO	[REDACTED]	NORTH BEND	OR	Adult Foster Care	512197	AA
KELLEY, BETTY L	[REDACTED]	CONDON	OR	Homecare Worker	616431	AA
KELLEY, BRIAN P	[REDACTED]	GRESHAM	OR	Homecare Worker	625966	AA
KELLEY, CHERYL R	[REDACTED]	PORTLAND	OR	Homecare Worker	751149	AA
KELLEY, FREDITH K	[REDACTED]	MYRTLE CRE	OR	Homecare Worker	759969	AA
KELLEY, HELEN L	[REDACTED]	ALBANY	OR	Homecare Worker	616804	AA
KELLEY, JACKIE M	[REDACTED]	SPRINGFIELD	OR	MH/DD Personal Care	662227	AA
KELLEY, JORDAN ALLEN	[REDACTED]	MADRAS	OR	Homecare Worker	658438	AA

Search Filters

The Search window also allows you to filter your search results. You will only receive results that match the characteristics that you selected. You may filter on the following characteristics:

Active Providers: The search window will default to a search for active providers. When this button is “clicked” the system will only return providers who are in an active status on the OMAP/MMIS provider files. Remember, however, that if the system finds an exact match on OMAP NUMBER or SSN/TIN, it will return that matching record, even if the provider record is not in an active status.

All Providers: You may elect to search all providers, both active and inactive.

City: You may filter your results by City. Type the city you are looking for in the City field, and the system will return results for the city indicated. Remember, however, that if the system finds an exact match on OMAP NUMBER or SSN/TIN, it will return that matching record, even if it is not in the city that you entered.

Type/Class: You may filter your results by Oregon ACCESS provider type or class. Oregon ACCESS has historically grouped its providers into general “provider classes” or “Types”. While some of these classes were exact matches to existing OMAP/MMIS provider types, some were not.

The OMAP/MMIS provider files have over 100 different provider type codes. Because it would be burdensome for field staff to have to look through 100 different provider types in order to find a particular type of provider, we decided to retain the more general groupings used in Oregon ACCESS. In most cases, this means that an Oregon ACCESS provider class will encompass several OMAP/MMIS provider types. For example, the Oregon ACCESS type of Medical Transportation includes all of the following MMIS/OMAP provider types:

- AA – Air Ambulance
- AM -- Ambulance
- BR – Transportation broker
- Etc....

Medicaid/ OAA Providers: In the CA/PS module, the search window also allows you to filter your search to return only Medicaid providers, or only OAA providers. When you enter the search window, the default setting will be a Medicaid Provider search. If you want to search for an OAA provider, you will click the button labeled OAA.

Placeholder Providers

There are four providers in the old Oregon ACCESS provider database that have been used as “placeholders” when staff don’t yet have a specific provider name to attach to a case record. SPD-IM-04-094 describes how the multiple administrative or placeholder providers were merged into four standard provider records. The available placeholder providers are:

- Provider Name Unknown
- To Be Determined (used to be To Be Selected)

- Master Plan
- Independent Choices

Because these providers are neither true OAA or true Medicaid providers, we had to devise a different way for staff to access these placeholder administrative provider types.

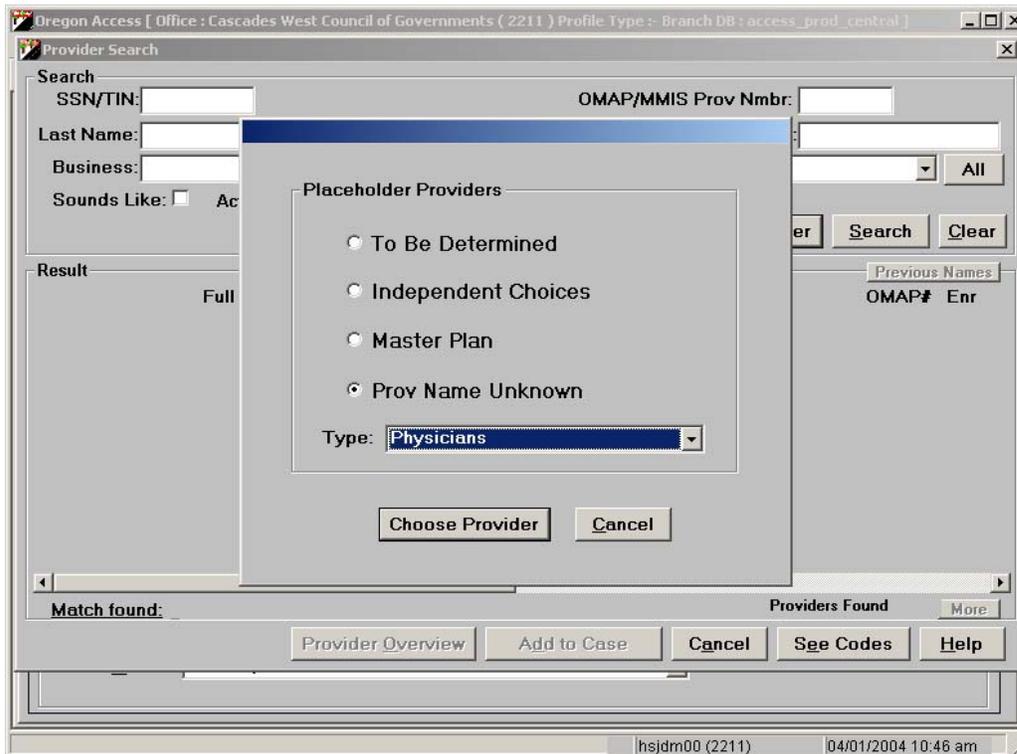
The new search windows display a button called Placeholder Provider.

Match found: _____ Providers Found [More](#)

[Provider Overview](#) [Add to Case](#) [Cancel](#) [See Codes](#) [Help](#)

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When you click on this button, a pop up window will display. You may select the appropriate placeholder/administrative provider name and category on this window, and then add the placeholder provider to your case record.



Provider Overview Screen

If your search finds a Medicaid provider that appears to be the one you are looking for, you can access additional information about that provider to verify that it is the correct one. If you highlight the provider row and click on the provider overview button, you will be taken to the 'Provider Overview' screen. The Provider Overview screen will display additional information about the provider. You may add the provider to the case record from either the search window or the Provider Overview screen. The provider overview button will not work for OAA only providers.

Provider Search

Detail

Record Type: OrACCESS Prov

Last: JONES First: ALISHIA Mid: K Title:

SSN: [REDACTED] DOB: 00/00/0000 Primary E-mail:

Phone Type Number Ext Other Types

Conversion (541) 981-9407 00000

Prov Credential / MMIS Provider Info

Type	Status	Branch	Start	End	Review Due
In-Home Care	Active Prior To Conv	2217	07/20/2004	07/31/2007	07/31/2007

MMIS Prov # Prov Type Status Enroll Status Dt

670555 HK AA 07/20/2004

MMIS Name: JONES, ALISHIA K

Financial / Tax

TIN: [REDACTED] TIN Name:

Filing Status: Alwnc: 00 Addl WH: 000.00 Pymt Mthd: Check

Physical Address

755 NE CIRCLE BLVD CORVALLIS, OR 97330-0000

In Care Of:

Buttons: Add to Assessment, See Codes, Back to Search, Previous, Next, Deselect ALL, Quick Select, Assign New Actions

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See Codes/Help

The new provider search screens and the provider overview screens display a button called “See Codes” When you click on the ‘See Codes’ button, a pop-up window will display. It will show you a list of codes that appear on the screen, along with a description of what each code means.

Provider Search

Search

SSN/TIN: OMAP/MMIS Prov Nbr:

Last Name: First: City:

Business: Type: All

Sounds Like: Active Providers All Providers Medicaid OAA

Placeholder Provider Search Clear

Result

Return to Original Search Previous Names

Full	SSN/TIN	City	State	Type	OMAP#	Enr
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Match found: Providers Found More

Buttons: Provider Overview, Add to Assessment, Cancel, See Codes, Help, Deselect ALL, Quick Select, Assign New Actions

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The image shows a software window with a title bar and a close button. The main content area is divided into two sections. The first section is titled "Field: Enrollment Status" and lists the following items:

- AA Active
- AC Active on Conversion
- AN Active non Contracted
- AP Active Contracted
- BT Business Terminated
- DE Deceased
- IC Inactive on Conversion
- IW AFS/DHEW Involuntary Withdrawal
- ID Inactive Due to Last Check Written Date
- PA Pending Active
- LS License Suspended
- LV License Revoked
- VW Voluntary Withdrawal from Program

The second section is titled "Field: Type" and lists the following items:

- AA Air Ambulance Serv
- AC A & D Abuse Prog

Below the lists, there is a "Close" button. At the bottom of the window, there are three buttons: "Deselect ALL", "Quick Select", and "Assign New Actions". The status bar at the very bottom shows "hscxb00 (2211)" and "01/04/2005 02:33 pm".