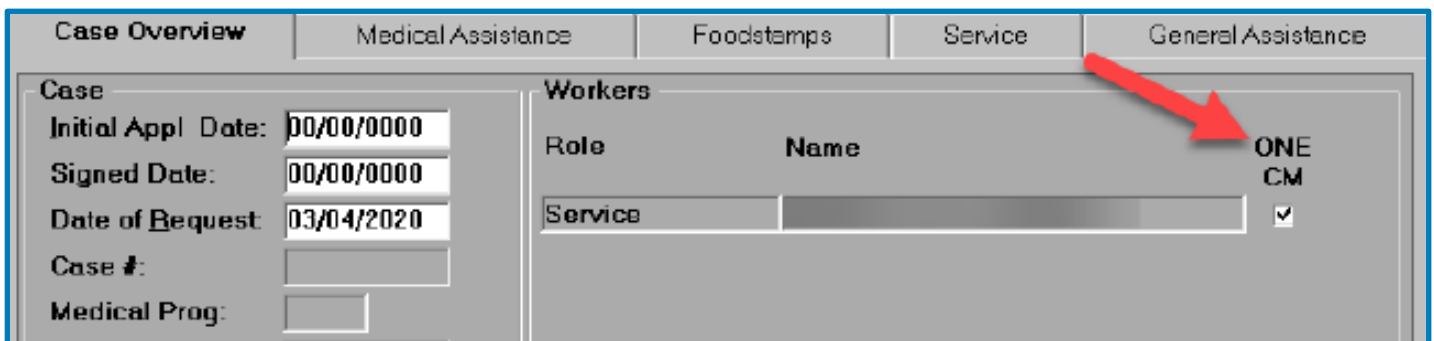# Case Manager Homepage Overview

The Case Manager (CM) Homepage provides information to case managers about specific actions taken in ONE that may require the case manager's attention. This homepage should be checked every day for changes occurring on the caseload. By continually monitoring the Homepage, case managers should be able to prevent provider payment issues and provide timely notice for adverse actions.

The alerts that are shown on the CM Homepage do not generate automatic notification to case managers. Case managers will need to go into ONE and review this information.

How Case Manager Information is Sent from Oregon ACCESS

Information about what case manager is assigned to a case is sent to ONE from Oregon ACCESS. On the benefit screen of Oregon ACCESS on the **Case Overview** tab, case managers can see the Workers and their roles. The worker whose name has a checkmark in the **ONE CM** checkbox will have this individual on their caseload in ONE. Only one worker can have the **ONE CM** checkbox checked.

The Primary Applicant on the case must be Client Index (CI) Registered, which assigns a prime number, for the information to be sent to ONE.

The **ONE CM** worker's Oregon ACCESS security profile must contain either an OR # or a P # for information to be sent to ONE.

If the **ONE CM** checkbox is checked but the case is not listed as assigned to the selected case manager on the CM Homepage, please have the local security administrator verify that the CM's OR# or P# in their Oregon ACCESS security profile is valid. **Please take this step prior to submitting a ticket to the ONE Helpdesk.**

Changes to the **ONE CM** information accumulates during the day and is sent to ONE each evening. Keep in mind, the individual will not be displayed on the **My Case Load** section of the new case manager's homepage until the next day.

Accessing the Case Manager Alerts

There are two ways to access the case manager alerts in ONE: on the CM **Homepage** or using the **Case Manager Alert Log**.

Case Manager Homepage

When a case manager first logs into the ONE System, their **Homepage** will look similar to the screenshot below. This data has been redacted. There are two sections, **Retrieve Cases** and **My Case Load**.

A case manager can see alerts on their **Homepage** by clicking the arrow to the left of **My Case Load** (outlined in a red box in the screenshot below). When the arrow faces down the CM will see their case load and any alerts on the cases.


The **My Case Load** section of the **Homepage** has several columns. The **Individual Name**, **Individual #**, **Prime #**, and **Person #** are all ways to identify an individual. The case load is normally listed alphabetically by the individual's first name upon login unless there are alerts on the case.

There is also a **Service Category** column that displays that displays the SELG record.

The next four columns display alerts: **Overdue Alerts**, **New Alerts**, **Completed Alerts**, and **Missed Appointments.**

If there are alerts on a case, those cases will be at the top the **My Case Load** section and in order of **Earliest Outstanding Alert** date starting with oldest date to newest date. If there are multiple alerts on the same date, those will be alphabetized by name. Once the alert is marked as complete, the name will go back into alphabetical order.

Case managers can get a quick look at why an alert has been generated by hovering over the alert icon, a tooltip will be displayed. An example is shown below. The CM hovered over the **Missed Appointment** icon, the tooltip displayed was **Missed Appointment – 1 Program 12345609 Medical, 07/11/2023 : 4:30 PM.**
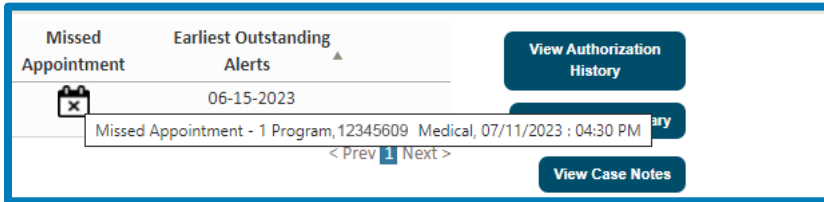
Note: Alerts will not transfer when a there is a case manager change. Alerts follow the Oregonian not the worker. If there is no alert icon displayed in any of the alert columns but there is an **Earliest Outstanding Alert** date, then there is an alert that has been generated on the case when another CM was assigned to the case or the case was unassigned. The CM will need to search for this alert using the **Case Manager Alert Log**.

Case Manager Alert Log

The **Case Manager Alert Log** offers the most search criteria to view alerts. To access the log, select the **Tools** tab on the top of the **ONE Homepage** then select **Case Manager Alert Log** (outlined in a red box in the screenshot below).
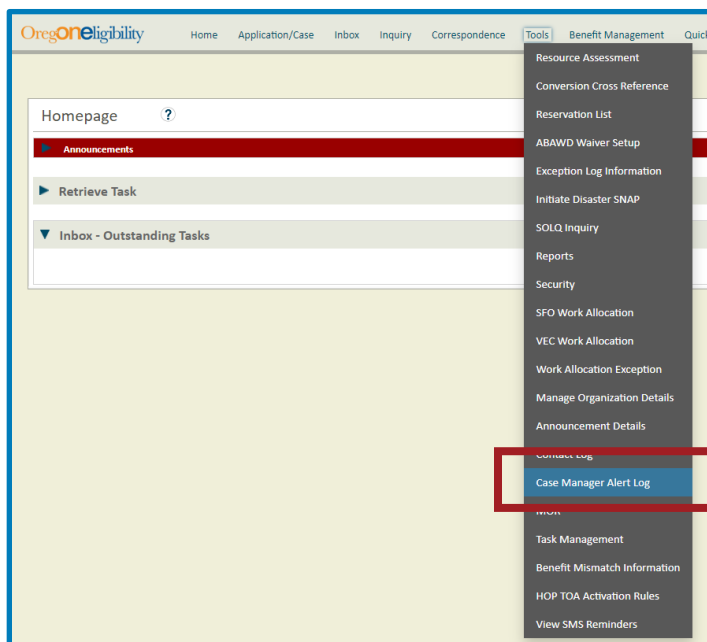
Accessing the **Case Manager Alert Log** through the **Tools** tab allows search criteria that includes **Case Manager Office**, **Case Office**, and **Case Manager Name**. A search from this screen must include at least one of the following fields: **Case Manager Office**, **Case Manager Name**, **Person #**, or **Individual #**.

Using the **Case Manager Alert Log** from the **Tools** tab allows workers to search by any **Case Manager Name** and also alerts that do not have an assigned case manager when the alert was generated.

Search results can be refined to include only certain **Alerts**, **Alert Status** or **Services** by selecting preferences using the checkboxes.

The **Reset** button can be used to reset all the search criteria to the default values, if a change to the search criteria is needed.

After selecting all search criteria, press the **Search** button to see the results.

In the example below, the search criteria included the **Liability Change** alert using the **Case Manager Name** of **Unassigned** and **Services** of **Other (Non I/DD or BH).** This will show APD individuals with a Liability Change that do not have an assigned case manager in ONE. Local Offices could use a search like this to review cases that had an alert before a case manager was assigned to the individual using the ONE CM checkbox in Oregon ACCESS. The search results could be used to identify cases for which the 512 needs to be touched or to check MMIS to make sure the liability was updated as expected.

Retrieve Cases

Another way to search for alerts is by using the **Retrieve Cases** section of the CM **Homepage** (outlined in a red box in the screenshot below). This section will only display alerts for the case manager that is logged into **ONE**. It can be used to focus on alerts that are higher priority and filter their caseload.

This document was created by APD Medicaid Financial Eligibility Training. Please contact us with any questions or clarification needs.