Active and Inactive in OACCESS

- OACCESS has the ability to <u>activate</u> or <u>inactivate</u> a Case or Screening. Until inactivation is done, OACCESS records are considered active. Activation and inactivation actions are completed from the Person Detail screen, which can be accessed from the Person Search results.

- When a Person Search is completed, check the results. The highlighted name at the top of the list is the system's best guess for who you're searching for. If the correct person is not highlighted, search the results and click the appropriate record. Searching by prime number is best, because it will only show one result, rather than a long list of names. Once the desired name is selected, click the View Person button at the bottom to navigate to the Person Detail screen.

- The Person Detail screen has an area called the Role(s) and Case Name(s). This area will have a column listing the Status. This Status will indicate whether the application, RA, or screening is in an Active or Inactive status.

- Inactivation of records may occur for cases or screenings that are no longer current, but may need to be updated and used again.

- Inactive records will not show as assigned to the local branch during a search, even though they may have been in the local branch prior to being inactivated. They will still show up after the user searches OACCESS, and are then available for reactivation and use.

- Inactive records will not show on reports.

Person Details:

This page will allow the user see the Case, Screening or Resource Assessment status. It will also allow activation, inactivation and archiving of certain records.

Inactive:

To Inactivate an Application or Screening, start on the Person Detail screen. In the persons Role(s) and Case Name(s) area of the screen, highlight the record to be inactivated. From here, select Status on the title bar and choose Inactivate. The status will then change from Active to Inactive.

To inactivate an Application, all case statuses must be closed, deceased, denied, or withdrawn, not just the OAA (or other) program.

When an Application or Screening has become inactive, it will no longer be available locally. The inactive record becomes available to any office, regardless of which office inactivated it. Any user, statewide, can retrieve it without having to request a transfer. All active records should be transferred as usual.

Certain records will be inactivated automatically, based on pre-defined criteria.

- A case will automatically become inactive 90 days after the status of all benefits received by the person(s) in the application have been marked as closed, deceased, denied or withdrawn, or the case status field, in the benefits section, is left blank.
- A screening will automatically become inactive 90 days after the date of contact or after the last modified date of the screening narrative, whichever is later.