Information Memorandum Transmittal
Developmental Disabilities Services

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Number: DD-IM-21-058
Issue date: 7/20/2021

Topic: Developmental Disabilities

Subject: Service Groups in eXPRS and Agency Provider Rates

Applies to (check all that apply):

☐ All DHS employees
☐ Area Agencies on Aging: {Select type}
☐ Aging and People with Disabilities
☐ Self Sufficiency Programs
☒ County DD Program Managers
☒ Support Service Brokerage Directors
☒ ODDS Children’s Residential Services
☐ Child Welfare Programs
☐ County Mental Health Directors
☐ Health Services
☒ Office of Developmental Disabilities Services (ODDS)
☒ ODDS Children’s Intensive In Home Services
☐ Stabilization and Crisis Unit (SACU)
☒ Other (please specify): Medicaid Certified Agency Providers (24-Hour Residential, Employment, Host Homes, Supported Living, Community Living Supports)

Message:
The Office of Developmental Disabilities Services (ODDS) has, for the past few years, been engaged in the Compass Project. One goal of the project is to use the Oregon Needs Assessment (ONA) to replace other assessment tools, including the Adult and Child Needs Assessment (ANA/CNA) and the Supports Intensity Scale (SIS). Among other things, the ONA assigns every individual to a service group based on assessed need. Please go here to learn more about service groups.

On Thursday, July 22, 2021, the ability to see the assigned service group for any individual with a current ONA, who is enrolled in a program for which the rate is set according to the service group, will be made available to Case Management Entities (CME) and certified Medicaid agency providers.

Beginning in July 2022, the service group will be used to establish a rate for certain services. These are all the services for which the rate will be set according to the

MSC 0080 (01.19)
service group during the initial roll out in July 2022:
  - 24 Hour Residential
  - Host Homes
  - Employment Path
  - Small Group Supported Employment
  - Day Support Activities
  - Job Coaching
  - Job Development
  - Discovery

Every individual will be assigned to one service group. Each service group has a payment category associated with it that determines the rate for the service. There are four payment categories. Some payment categories apply to more than one service group.

<table>
<thead>
<tr>
<th>Service Groups 1 and 2</th>
<th>Payment Category 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Group 3</td>
<td>Payment Category 2</td>
</tr>
<tr>
<td>Service Group 4</td>
<td>Payment Category 3</td>
</tr>
<tr>
<td>Service Group 5</td>
<td>Payment Category 4</td>
</tr>
</tbody>
</table>

For most individuals this can be considered INFORMATION ONLY at this time. The only services that are currently impacted are the Children’s Residential Program (SE142) and Host Homes (SE152). The rates for those two services are currently based on the service group. Other service types whose rates will be based on service groups will be impacted in July 2022. The rate paid to provider will be based on the individual’s assigned service group. Please go [here](#) to see more about rates and the rate models.

The role of the ONA will continue to become more significant over the course of the next couple of years. It is critical that these assessments are accurate. The service groups are being released well in advance of the time they will impact rates so there is time to make them as accurate as possible as reassessments occur. CMEs and those contributing to the ONA must make every reasonable effort to assure their accuracy.

See the attachment to this transmittal below for instructions for finding service groups in eXPRS. These will be posted to the eXPRS help menu at the time of the next eXPRS update, later this fall.

**Communication/training:**
This transmittal will be discussed during the next Monthly Transmittal Review. These meetings are held the second Wednesday of every month at 2 pm using the TEAMS platform. The link to participate is here: [Join Microsoft Teams Meeting](#), or you can call
971-277-2343 using conference ID: 468 508 153# to hear only the audio portion of the meeting. Please send questions in advance to ODDS.Questions@dhsoha.state.or.us.

If you have any questions about this information, contact:

<table>
<thead>
<tr>
<th>Contact(s): Mike Parr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone:</td>
</tr>
<tr>
<td>Fax:</td>
</tr>
<tr>
<td>Email: <a href="mailto:mike.r.parr@dhsoha.state.or.us">mike.r.parr@dhsoha.state.or.us</a></td>
</tr>
</tbody>
</table>
How to Find & View the Service Group (SG) Information on an Individual’s Oregon Needs Assessment (ONA) Case Management Entities
(updated 7/19/2021)

The eXPRS permissions for CMEs to view the Service Group (SG) information on an individual’s Oregon Needs Assessment (ONA) have been updated. CMEs can now view SG information in eXPRS.

Detailed information on Service Groups can be found on the ODDS website for Service Groupings here: https://www.oregon.gov/dhs/SENIORS-DISABILITIES/DD/Pages/Service-Groupings.aspx

Users will need to be assigned one of the below user roles to view the ONA Service Group information:

CDDPs:
- CM ONA Viewer
- CM ONA SC
- CM ONA Assessor

Brokerages:
- Brokerage ONA Viewer
- Brokerage ONA PA
- Brokerage ONA Assessor

State Kids Services
- State Kids Svcs ONA Viewer
- State Kids Svcs ONA SC/PA
- State ONA Assessor
To Find & View the SG Information on an ONA:

1. Log in to eXPRS. Users will need to select the (Provider) log in option from the Organizational/Program Area dropdown (if dropdown is present).

![Login](image1)

2. From the left-hand menu, click on Client → Oregon Needs Assessment.

![Menu](image2)

3. In the Find Oregon Needs Assessment (ONA) page, enter the criteria needed to find the desired individual’s ONA. Simply using the individual’s Client Prime number to search should be sufficient. With the criteria entered, click Find to search.
4. From the list of ONAs returned, you can view the individual’s Service Group information from the list. Or click on the blue ID number for the ONA desired to open it. *Results list columns are defined in Appendix A, on page 5 of this guide.*

5. With the ONA open, click on the last box in the progress/status bar so it turns red. This will take you to the last page of the individual’s ONA.
6. When viewing the last page of the ONA – the **Comprehensive Review** page - scroll to the bottom to view the Service Group information.

The ONA Service Group information is defined as:

- **General Support Needs Score** = a numeric score result for the individual’s ADL/IADL assessed support needs.

- **Medical Support Score** = YES / NO value; indicates if the individual’s assessment lists medical conditions or needs requiring treatment or support.
• **Behavior Support Score** = YES / NO value; indicates if the individual’s assessment lists behavioral support needs requiring supports.

• **Age Cohort** = the service grouping age category that the individual falls within based on their age at the time of the assessment.

• **Service Group** = the individual’s service group based on the assessment; the service group indicates rates for specific services and/or hourly service limits for the individual based on their assessed need.

Detailed Service Group scoring information is available in this guide: https://www.oregon.gov/dhs/SENIORS-DISABILITIES/DD/Documents/Service-Grouping-Scoring.pdf
1. **ID** = the ONA ID number assigned to the assessment by eXPRS.

2. **Status** = status of the Oregon Needs Assessment

3. **Prime** = the individual’s DHS Prime Number

4. **Client Name** = the name of the individual being assessed

5. **County** = the individual’s home county.

6. **Service Setting** = the individual’s residential service setting at the time of the assessment.

7. **ONA Submit Date** = the date the assessment was submitted out of *draft* status.

8. **ONA Expiration Date** = the date the assessment expires.

9. **Assessor** = the name of the person completing the assessment.

10. **Service Group** = service level group category for the individual, based on their assessed support needs.

11. **Enhanced/Exceptional** = YES / NO; indicating whether that individual has been assessed to have Enhanced/Exceptional support needs.

12. **LOC** = Status of the Level of Care (LOC) generated from the completed ONA; also a hyperlink to open the ONA’s Level of Care report.

13. **Risk Report** = the date the risk report was created; also a hyperlink to open the Risk report for more details.
How to Find & View the Service Group (SG) Information from an Individual’s Oregon Needs Assessment (ONA) 
Agency Providers  
(updated 7/19/2021)

The eXPRS permissions for Agencies to view the Service Group (SG) information from an individual’s Oregon Needs Assessment (ONA) have been updated. DD Agency Providers can now view SG information in eXPRS.

Detailed information on Service Groups can be found on the ODDS website for Service Groupings here: [https://www.oregon.gov/dhs/SENIORS-DISABILITIES/DD/Pages/Service-Groupings.aspx](https://www.oregon.gov/dhs/SENIORS-DISABILITIES/DD/Pages/Service-Groupings.aspx)

DD Agency Provider users will need to be assigned the below user role to view the ONA Service Group information:

- Provider Agency Claims Manager

**To Find & View the SG Information from an ONA:**

1. Log in to eXPRS. Users will need to select the [Provider] log in option from the Organizational/Program Area dropdown (if dropdown is present).
2. From the left-hand menu, click on **Client → Agency Service Group Report**.

![Client Menu](image)

3. In the **Agency Service Group Report** page, enter the criteria needed to find the desired individual’s Service Group (SG) information.

**Search Tips:**
- To search for SG information for a specific individual, enter their prime number in the **Client Prime** field.
- To search for a current list of individuals receiving services from your Agency, enter a current date range (ex: 1/1/2021 – 6/30/2021) in the **ONA Submit Date From** and the **ONA Submit Date To** fields.

With the criteria entered, click **Find** to search.
4. A results list will populate below the search criteria fields. The service group information will be listed in the far-right column. *The results list columns are defined in Appendix A, on page 4 of this guide.*

5. The result list can be exported if desired. Simply use the export options found at the top of the results list.
APPENDIX A:
Agency Service Group report search results list columns defined:

<table>
<thead>
<tr>
<th></th>
<th>ID</th>
<th>Status</th>
<th>Prime</th>
<th>Client Name</th>
<th>County</th>
<th>Service Setting</th>
<th>ONA Submit Date</th>
<th>ONA Expiration Date</th>
<th>Service Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ID1</td>
<td>Approved</td>
<td>xyz000a</td>
<td>BOATMAN, FISHER</td>
<td>Washington</td>
<td>Children's In-Home Services (SE151)</td>
<td>6/29/2021</td>
<td>6/30/2022</td>
<td>5 - High to Very High</td>
</tr>
<tr>
<td>2</td>
<td>ID2</td>
<td>Approved</td>
<td>xyz000a</td>
<td>BOATMAN, FISHER</td>
<td>Multnomah</td>
<td>Children's In-Home Services (SE151)</td>
<td>10/13/2020</td>
<td>6/28/2021</td>
<td>5 - High to Very High</td>
</tr>
<tr>
<td>3</td>
<td>ID3</td>
<td>Approved</td>
<td>xyz000a</td>
<td>BOATMAN, FISHER</td>
<td>Multnomah</td>
<td>Children's In-Home Services (SE151)</td>
<td>10/25/2019</td>
<td>10/12/2020</td>
<td>5 - High to Very High</td>
</tr>
<tr>
<td>4</td>
<td>ID4</td>
<td>Approved</td>
<td>xyz000a</td>
<td>BOATMAN, FISHER</td>
<td>Washington</td>
<td>Children's In-Home Services (SE151)</td>
<td>6/12/2019</td>
<td>10/24/2019</td>
<td>5 - High to Very High</td>
</tr>
</tbody>
</table>

1. **ID** = the ONA ID number assigned to the assessment by eXPRS.
2. **Status** = status of the Oregon Needs Assessment
3. **Prime** = the individual’s DHS Prime Number
4. **Client Name** = the name of the individual being assessed
5. **County** = the individual’s home county.
6. **Service Setting** = the individual’s residential service setting at the time of the assessment.
7. **ONA Submit Date** = the date the assessment was submitted out of *draft* status.
8. **ONA Expiration Date** = the date the assessment expires.
9. **Service Group** = service level group category for the individual, based on their assessed support needs.