

## How to Find the Service Group for Individuals Served by Your Case Management Entity

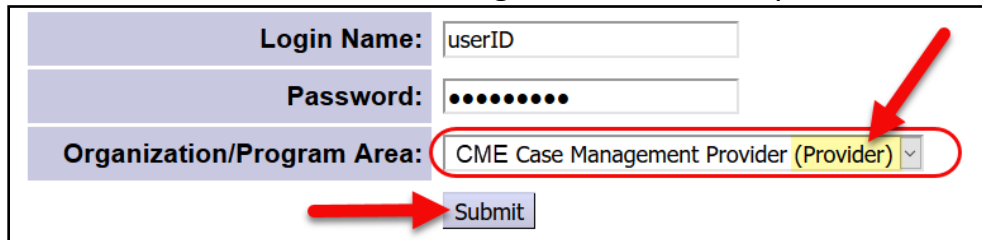
The Oregon Needs Assessment (ONA) has reports that allow specific users to view Service Group (SG) information. These reports can pull SG information for an individual or for all those enrolled with your Case Management Entity (CME).<sup>1</sup>

To take the steps in this guide, users will need to be assigned one of following user roles for your type of CME:

- **ONA Viewer**
- **ONA SC/PA**
- **ONA Assessor**

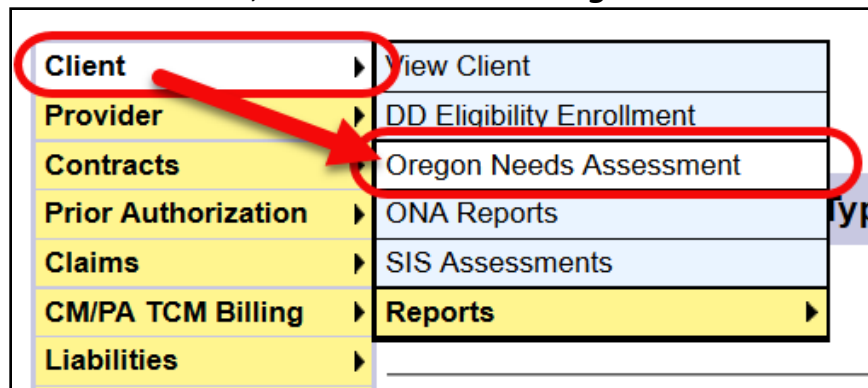
### How to Find the SG Information for Individuals Enrolled with your CME:

1) Log in to eXPRS under the Case Management Provider option.



<b>Login Name:</b>	<input type="text" value="userID"/>
<b>Password:</b>	<input type="password" value="••••••••"/>
<b>Organization/Program Area:</b>	<input type="text" value="CME Case Management Provider (Provider)"/>
	<input type="button" value="Submit"/>

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



<b>Client</b>	View Client
<b>Provider</b>	DD Eligibility Enrollment
<b>Contracts</b>	Oregon Needs Assessment
<b>Prior Authorization</b>	ONA Reports
<b>Claims</b>	SIS Assessments
<b>CM/PA TCM Billing</b>	Reports
<b>Liabilities</b>	

<sup>1</sup> Detailed information on Service Groups and how they are evaluated in the ONA can be found on the **Compass Project: Service Group Framework** webpage, which is on ODDS' main website.

- 3) On the **Find Oregon Needs Assessment** page, set the following criteria and select **Find**.
  1. **Status:** Approved
  2. **ONA Expiration Date From:** Enter the start of the current month (e.g. 6/1/2023)
  3. **ONA Expiration Date To:** Enter the end of the month one full year later (e.g. 6/30/2024)
  4. **Display Format:** Select SG Score columns

**Find Oregon Needs Assessment**

At least one search criteria must be entered.

Assessment ID:	<input type="text"/>
Client Prime:	<input type="text"/>
Status:	Approved <span style="color: purple;">1</span>
County:	<input type="text"/>
Service Setting:	<input type="text"/>
ONA Submit Date From:	<input type="text"/>
ONA Expiration Date From:	06/01/2023 <span style="color: purple;">2</span>
Service Group:	<input type="text"/>
LOC Status:	<input type="text"/>
Current Individuals Only:	<input checked="" type="checkbox"/>
Max Displayed:	25
ONA Submit Date To:	<input type="text"/>
ONA Expiration Date To:	06/30/2024 <span style="color: purple;">3</span>
Enhanced:	<input type="text"/>
Display format:	SG Score columns <span style="color: purple;">4</span>

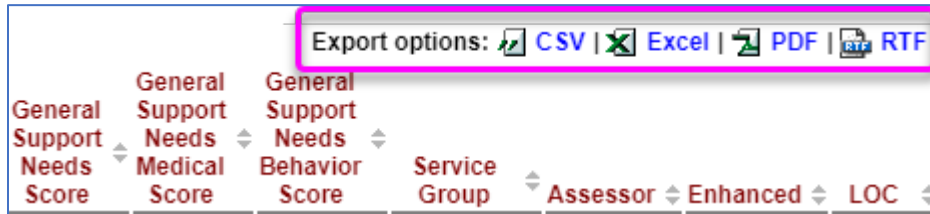
**TIP:** The **Display Format** dropdown options can be used to adjust the information that displays in the results list. For example, the **SG Score Columns** selection gives details information on Age Cohort, Service Group and Support Needs. Try the other options and vary your search criteria to see different information if needed.

- 4) From the Results list, you can view the Service Group information.

ID	Status	Prime	Client Name	County	Age Cohort	Service Setting	ONA Submit Date	Expiration Date	General Support Needs Score	General Support Needs Medical Score	General Support Needs Behavior Score	Service Group	Assessor	Enhanced	LOC
2	Approved				ADL	Comp In-Home (SE49)	6/14/2023	6/30/2024	60	0(N)	1(Q)	4 - High		No	Approved
7	Approved				CHI	Children's In-Home Services (SE151)	6/14/2023	6/30/2024	72	1(N)	3(N)	4 - Moderate		No	Approved
7	Approved				INF	Children's In-Home Services (SE151)	6/14/2023	6/30/2024	84	0(N)	0(N)	5 - Infant/Toddler Supports		No	Approved

**TIP:** This search criteria will return the majority of individuals served by your CME, but it may not return all of those served. For example, there may be an individual who has an Accepted Client Prior Authorization with your CME, but the Oregon Needs Assessment is not yet complete.

**TIP:** You can also sort this data by a column header and export it if needed.



**How to Find SG Information for a Specific Individual:**

- 1) Follow Steps #1-3 listed above. You may adjust the criteria as needed to find your individual. For example, you can enter a Prime # to limit the results to just one individual.

**Find Oregon Needs Assessment**  
At least one search criteria must be entered.

Assessment ID:

**Client Prime:**

Status:

County:

Service Setting:

ONA Submit Date From:  ONA Submit Date To:

ONA Expiration Date From:  ONA Expiration Date To:

Service Group:  Enhanced/Exceptional:

LOC Status:

Current Individuals Only:  Display format: Default columns

Max Displayed: 25

- 2) From the Results list, you can view the individual’s Service Group information from the list. You can also click the **ID** hyperlink for the ONA to open it.

Current Individuals Only:  Display format: Default columns

Max Displayed: 25

Export options:

ID	Status	Prime	Client Name	County	Service Setting	ONA Submit Date	ONA Expiration Date	Assessor	Service Group	Enhanced/Exceptional	LOC	Risk Report
<a href="#">3*****-3</a>	Approved	xyz0000a	VADER, ELLA		Adult Foster Care (SE158)	10/22/2020	10/31/2021	Assessor's Name	2 - Low	No	Approved	
<a href="#">3*****-2</a>	Approved	xyz0000a	VADER, ELLA		Adult Foster Care (SE158)	12/31/2019	10/21/2020	Assessor's Name	2 - Low	No	Approved	
<a href="#">3*****-1</a>	Approved	xyz0000a	VADER, ELLA		Adult Foster Care (SE158)	10/25/2019	12/30/2019	Assessor's Name	2 - Low	No	Approved	
<a href="#">3*****</a>	Approved	xyz0000a	VADER, ELLA		Adult Foster Care (SE158)	10/23/2018	10/24/2019	Assessor's Name	2 - Low	No	Approved	

**TIP:** See Appendix A for the definitions of the column results list.

- 3) On the Oregon Needs Assessment, click on the last box in the progress bar to go to the last page of the ONA.

**Oregon Needs Assessment**

I - Assessment and Demographic Information

Assessment ID: 3\*\*\*\*\* -3  
 Status: Approved

Assessment Type: Annual (Certified Assessor ONA)  
 Date of

- 4) On the **Oregon Needs Assessment > Comprehensive Review** section, scroll to down to view the Service Group information.

**Oregon Needs Assessment**

Comprehensive Review

Legal Name: VADER, ELLA      Date of Birth: mm/dd/yyyy      Age at time of Assessment: 3  
 Client Prime: xyz000a      Gender: M or F

Assessment ID: 3\*\*\*\*\* -3      Assessment Status: Approved  
 Date of Face-to-Face: 10/21/2020      Assessment Type: Annual (Certified Assessor ONA)

▶ V - Safety  
 ▶ VI - Medical

Expand all    Collapse all

General Support Needs Score	Medical Support Score	Behavior Support Score	Age Cohort	Service Group
31	No	No	Adult	2 - Low

Cancel    Previous    Print Full    Print Summary    Create Risk Report    ONA Reports

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. 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.

## APPENDIX A: ONA search results list columns defined

- **ID:** The ONA ID number assigned to the assessment by eXPRS.
- **Status:** Status of the Oregon Needs Assessment.
- **Prime:** The individual's DHS Prime Number.
- **Client Name:** The name of the individual being assessed.
- **County:** The individual's home county.
- **Birthday:** The individual's date of birth.
- **Age:** The individual's current age.
- **Age Cohort:** The current Age Cohort for the individual (ADT for Adult, CHI for Child, INF for Infant).
- **Service Setting:** The individual's residential service setting at the time of the assessment.
- **ONA Submit Date:** The date the assessment was submitted out of *draft* status.
- **ONA Expiration Date:** The date the assessment expires.
- **General Support Needs Score:** The numeric score result for the individual's ADL/IADL assessed support needs.
- **General Support Needs Medical Score:** A numeric score and letter combination that shows the result for individual's medical support needs. For example, 7(Q) indicates the score and that the individual has a qualifying medical need. **Q** means Qualified, **N** means Not Qualified.
- **General Support Needs Behavior Score:** A numeric score and letter combination that shows the result for individual's behavioral support needs. For example, 3(N) indicates the score and that the individual does not have a qualifying behavioral. **Q** means Qualified, **N** means Not Qualified.
- **Assessor:** The name of the person completing the assessment.
- **Service Coord./Personal Agent:** The individual's Service Coordinator or Personal Agent
- **Service Group:** The Service Group for the individual, based on their assessed support needs.
- **Enhanced/Exceptional:** Yes/No. Indicates whether an individual has been assessed to have Enhanced/Exceptional support needs.
- **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.
- **Risk Report:** The date the risk report was created; also a hyperlink to open the Risk report for more details.