Oregon ACCESS Best Practice
for
OAA Provider and OAA Site
management screens

Change Log	Version	Date
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Department of Human Services

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1 INTRODUCTION

This best practice has been developed to assist Area Agencies on Aging (AAA) to effectively setup OAA/OPI service within Oregon ACCESS (OA) so that end reporting to state and federal agencies is correct, easy to maintain and responsive to reporting needs.

Before an AAA may log into Oregon ACCESS the State Unit on Aging (SUA) must perform some preliminary steps. The SUA must request that the DHS Office of Information Services (OIS) make additions to the tables that define organizational structures within OA. Those data elements are:

Data Elements	AAA Data	Contents
District	AAA District name	District number, District name
Branch	AAA offices	Office number, Office name
Security	sub-administrators, users	Employees and volunteers, Security level

FIGURE 1 PROVIDER & SERVICES SETUP OVERVIEW

1.1 PHILOSOPHY

The primary use of this information is for the administrative functions and data entry of OAA/OPI providers, services and service sites within Oregon ACCESS.

This guide will be a living document as the programs discussed within are continually updated in response to Oregon State and Federal requirement changes.

NOTE: Any personal data shown in this guide is fictional. Any resemblance to a person, living or dead is purely accidental.

1.2 GLOSSARY

Following are the terms and acronyms that appear throughout the document.

Acronym	Term	Other
AAA	Area Agencies on Aging	The designated entity with which the Division contracts to meet the requirements of the Older Americans Act and ORS Chapter 410 in planning and providing services to the elderly or elderly and disabled population for a designated Planning and Service Area.

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Acronym	Term	Other
AoA	Administration on Aging	US Dept of Health and Human Services department that oversees the Older Americans Act and Aging Network. http://www.aoa.gov
Branch	Branch	A numerical identifier assigned to each DHS/SPD and DHS partner agency office operating in a public capacity where clients may walk-in and obtain services.
DB	Database	This is a collection of relational data that is stored in a logical fashion to make it easy to extract specific information and produce reports.
DHS	Department of Human Services	This is the Oregon state agency responsible for administering and reporting information on AoA services and funding.
District	District	One of the 17 districts within Oregon. See PSA within this document.
OA	Oregon Access	This application is used to enter information about people receiving assistance services, the service providers and locations where services are provided within Oregon.
OAA	Older Americans Act	These are the laws that govern the systems in this guide.
OIS	Office of Information Services	Division with DHS responsible for application maintenance and database support. They maintain OA and the background database tables.
OPI	Oregon Project Independence	Oregon Project Independence (OPI) serves individuals who are age 60 and older or individuals who have been diagnosed with Alzheimer's disease or a related disorder. It provides in-home services to seniors who require the same level of care as people in nursing homes, but who typically do not qualify for Medicaid.
PSA	Planning and Service Area	The geographical area, consisting of one or more counties, for which one Area Agency on Aging is designated by the Seniors and People with Disabilities Division of the Department of Human Services to plan for and provide services under the Older Americans Act and Oregon Revised Statute (ORS) Chapter 410.
RACF	RAC-F	Resource Access Control Facility - an IBM-licensed data security product.

Acronym	Term	Other
SUA	State Unit on Aging	The Oregon DHS unit charged with oversight of AoA activities within Oregon.

FIGURE 2 ACRONYMS

1.3 TYPOGRAPHICAL CONVENTIONS

The following conventions will be observed throughout this guide.

Text Type or Symbol	Meaning
Bold Text	Bold text indicates a field name; the name used to define information used as input on a screen.
Appendix A	Designates a hyperlink. It may be within the document or to an external URL.
"**OAA Summary**".	The name of a screen or tab or button within Oregon ACCESS or RAIN.
"Unknown"	A value set within the system.
	This box designates the primary points of interest on a report page or the fields of interest on an application screen. Generally these are the OAA Required fields.
	This white box designates the path to get to a specific input screen. It might take several clicks to get to the final screen/tab.
	This designates a button that may navigate to an optional screen.
<CTL>+<Shift>	Entries in <> signs are keyboard keys. The plus sign indicates that the first key is held while the second key is struck.
<Click>	Left mouse click.

FIGURE 3 TYPOGRAPHICAL CONVENTIONS

2 OREGON ACCESS

The DHS Oregon ACCESS system is used to enter (and report) information about clients, providers, services and locations where AoA activities are provided or consumed.

The following Process flow outlines the complete series of steps, from the point of establishing a new AAA to the point of service delivery to a client, which are necessary to report utilizations to NAPIS.

We are covering the actual process of setting up an AAA within Oregon ACCESS and RAIN, not the contracts and legal paperwork that would have been completed prior to adding the AAA, providers and services in the OA and RAIN systems.

This Best Practice does not include adding a client to receive services which was fully discussed in the *User's Guide to Oregon ACCESS and RAIN for AoA and NAPIS Reporting (*OAA User's Guide).

The text in each box begins with a number where there is a process to be documented. Refer to the sections following for process details.

It is important to note that information that is entered at any branch modifies the providers/sites/services for all branches within that district.

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Process to Create and Populate an AAA, Providers, Locations and Services
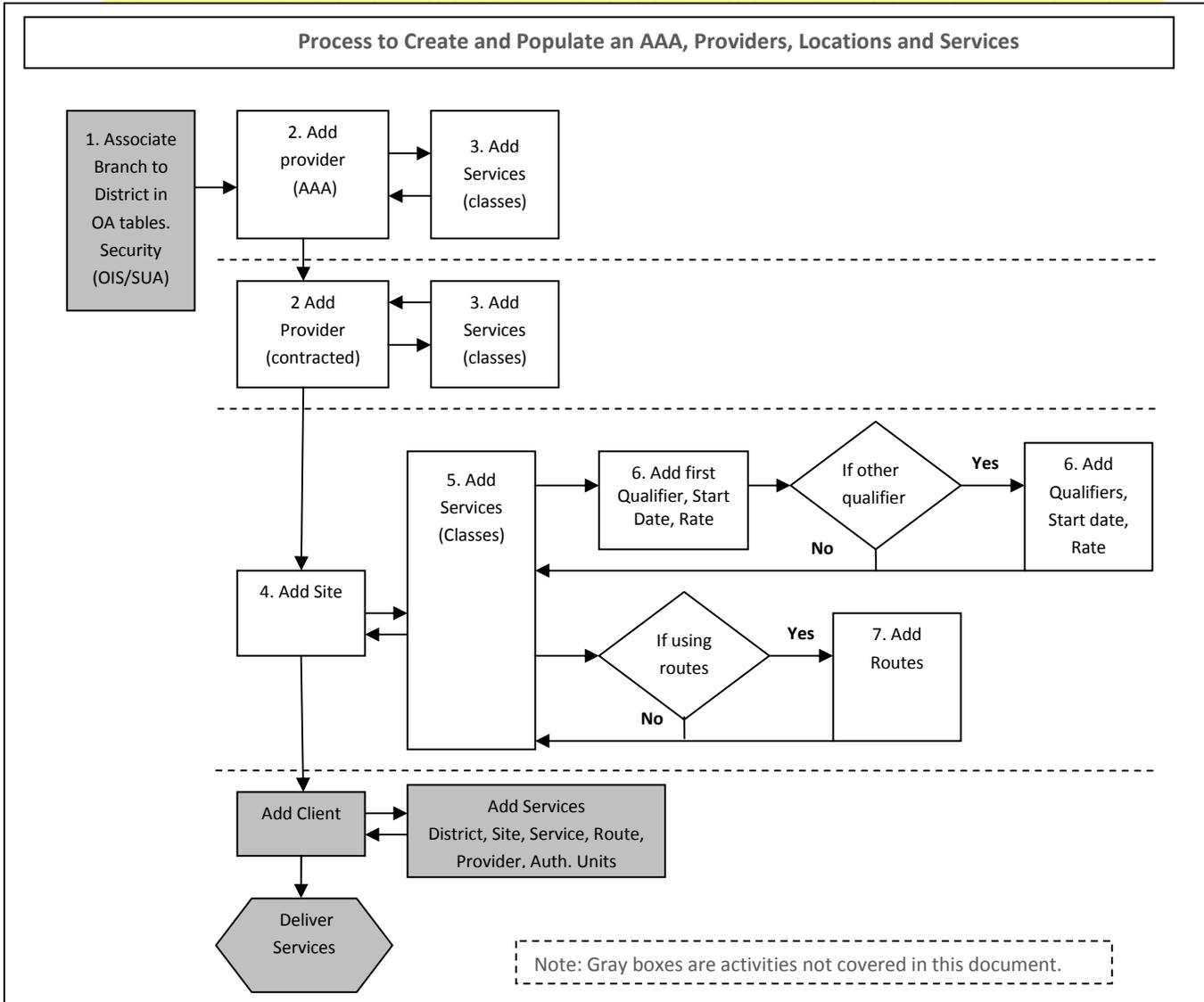
FIGURE 4 PROCESS FLOW

2.1 ASSOCIATE BRANCH TO DISTRICT IN OA TABLES. (STEP 1.)

This step isn't fully covered in this document since it is not direct data entry performed by the AAA.   Senior & People w/Disabilities will beginby performing the following administrative items:

- Establish the District name and number in Oregon ACCESS.

- Establish the Branch name(s) and number(s) in Oregon ACCESS and associate it to the District.

- Provide Individual User Profiles for AAA end-users to complete and submit requesting security access to DHS applications

- Request that the Oregon ACCESS client be installed or access to the OA application on CITRIX be granted for each end-user entering NAPIS data into the DHS applications.

When all of these items have been completed and processed, move on to step 2.

2.2 ADD PROVIDER. (STEP 2.)

The first step a AAA should perform is to add itself as a provider. Once this is completed, AAA contractors/providers are added. When adding the additional providers, the steps are identical except for selecting the AAA as provider **Provider Is AAA** ☑ box.

- Log into OA using the RACF ID and password assigned to you by DHS.

2.2.1 ADD PROVIDER IN OA

To get to the Provider Maintenance area:

1. <Click> on **Select** on the upper menu.

2. <Click> **Housekeeping** on the dropdown menu.

3. <Click**> Maintain OAA Provider** in the second dropdown menu.

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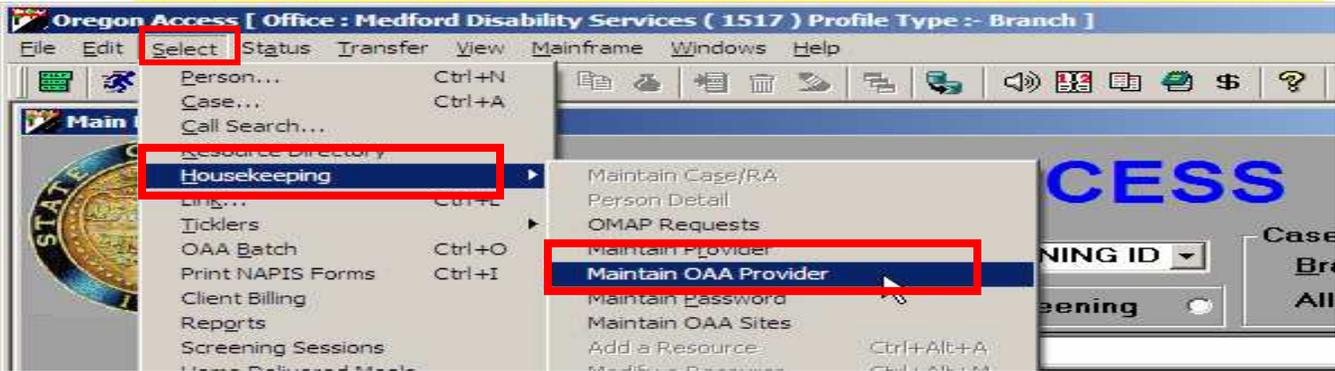
FIGURE 5 OAA PROVIDER MAINTENANCE

Note: Do NOT select Maintain Provider as this is Medicaid providers not OAA/OPI providers.
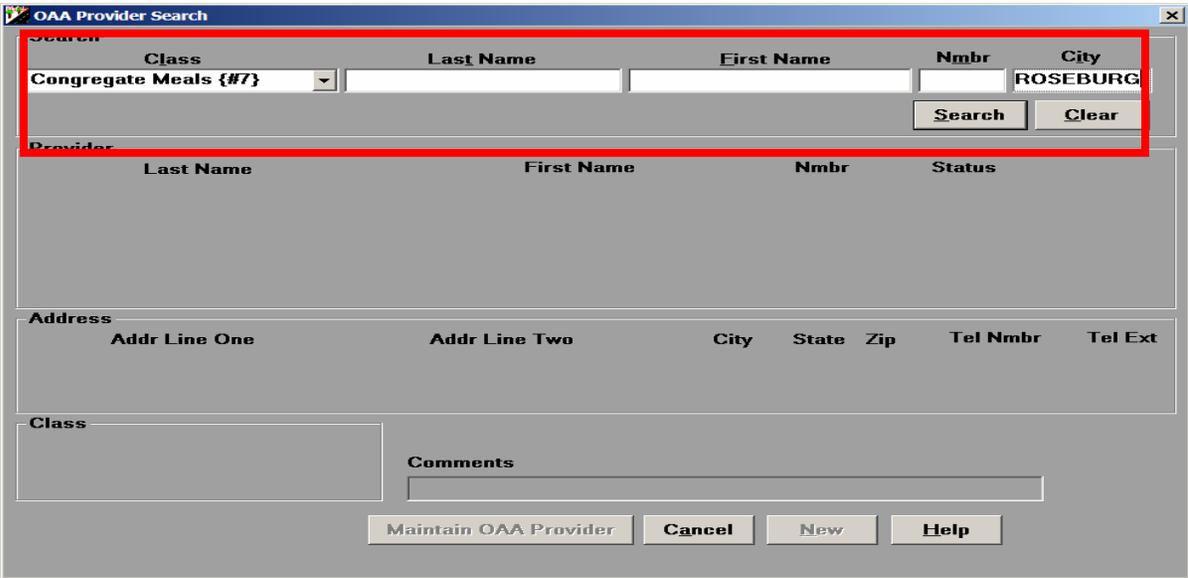
FIGURE 6 OAA PROVIDER SEARCH SCREEN

Make sure the provider does not exist before adding the new AAA office or provider by performing a **Provider Search**. To search for an OAA/OPI provider, you must enter a provider class, a last name or a provider number and <Click> **Search**. You can refine your search by entering a city to reduce the number of results you might receive.

If OA finds more then 50 records, it will display a pop-up message and only display the first 50 records. If it finds no providers, it will prompt you to add a new Provider. See *the OAA User's Guide* for specifics on provider maintenance.

Once you <Click> **Search** you should see the following screen:
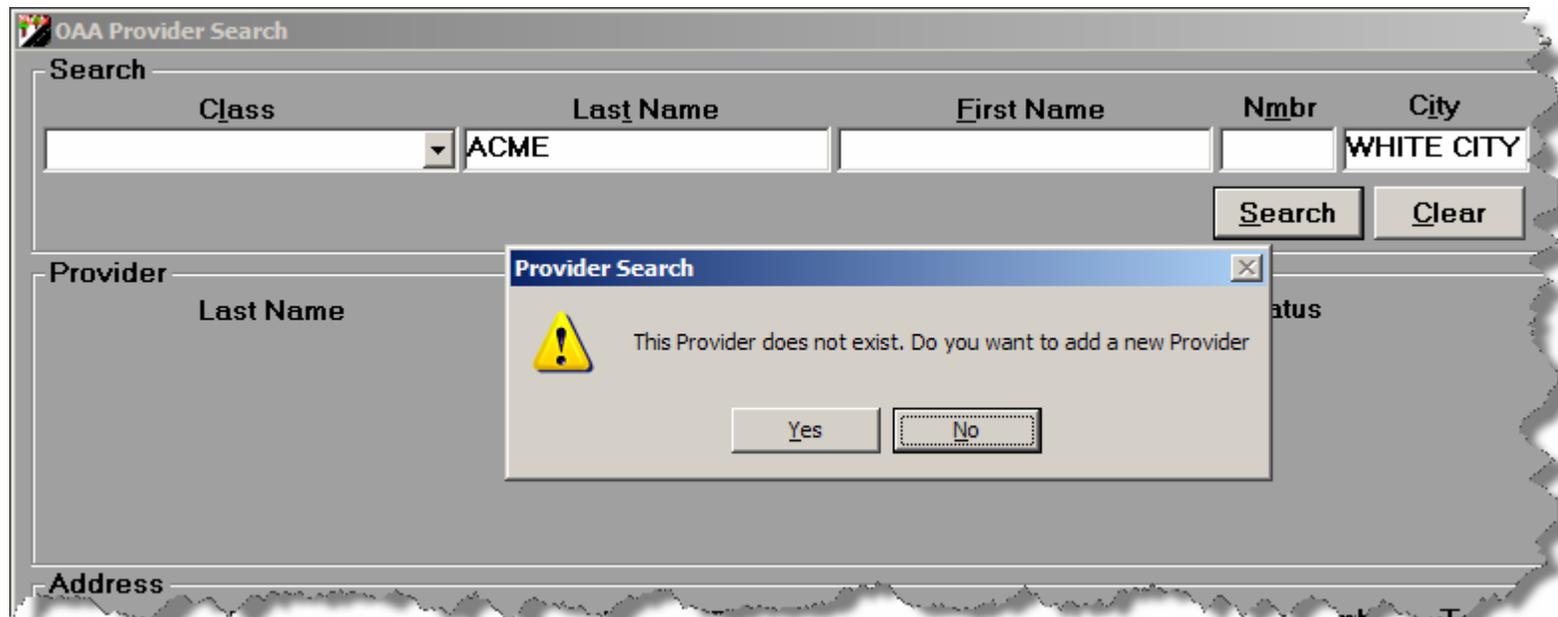
FIGURE 7 OAA PROVIDER MAINTENANCE

<Click> **Yes** and a blank provider screen is displayed.

FIGURE 8 OAA PROVIDER ADD SCREEN

Whatever criteria you used for the search will auto fill into the form fields. If you searched on a **Class**, it will be in the **Class** field. If you searched for a **Last Name**, it will be in the **Last Name** field. If you searched for a provider **Nmbr**, it will be inserted.

1. Enter the Provider **Last Name**. If this is a company or organization, only use the **Last Name** field.

2. Enter the Provider **First Name** if this is an individual.

3. Enter any informational **Comments**.

4. <Click> **Add Address.**   This will give you the following pop-up to enter the address.

FIGURE 9 OAA PROVIDER ADD SCREEN

5. It is important to check **Minority Provider** and **Rural provider** if these apply. See AoA guidelines below.

A **Rural Provider** is a provider of services to clients who live in rural areas. Rural providers are not necessarily providers of services only to rural clients. They may also be providers of services to clients in urban areas. A non–rural provider would only provide services to urban clients. Most of Oregon is considered rural so there will be few non-rural providers.

FIGURE 10 RURAL PROVIDER REQUIREMENTS

A **Minority Provider** meets one of the following criteria:
1. A not for profit organization with a controlling board comprises at least 51% of individuals in the racial and ethnic categories listed below.*
2. A private business concern that is at least 51% owned by individuals in the racial and ethnic categories listed below.*
3. A publicly owned business at least 51% of its stock owned by one or more individuals and having its management and daily business controlled by one of more individuals in the racial and ethnic categories listed below.*
    *The applicable racial and ethnic categories include American Indian or Alaskan Native, Asian, Black or African American, Native Hawaiian or other Pacific Islander or Hispanic.

FIGURE 11 MINORITY PROVIDER REQUIREMENTS

2.2.2 AAA AS PROVIDER

Usually an AAA will contract the provision of services out to specialized providers. However, in some situations the AAA is the actual provider of services, using their own staff resources.   In that situation, the AAA may check the **AAA as Provider** checkbox when setting up services.

- When an AAA is a provider of services, selecting the AAA is Provider check box **Provider Is AAA** ☑ will add the AAA into the provider counts in your State Program Report.

- ==Care should be taken to only add directly provided services under the AAA to avoid duplicate counts==
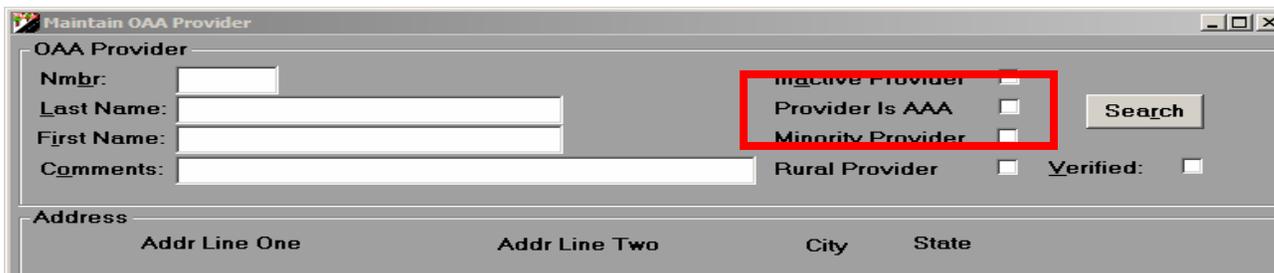
FIGURE 12 OAA MAINTAIN OAA PROVIDER DETAIL SCREEN

2.3 ADD SERVICES (CLASSES) FOR PROVIDER. (STEP 3.)

6. Continuing from step 6 above, the new provider **Class** defaults to the class for which you searched. If it was not part of the search criteria, you will need to <Click> **Add Class** to add the first provider **Class.**   If it is there, you may change it to a different **Class** by selecting it in the drop-down box. Continue adding classes until you have selected all classes for this provider. ==Do not create duplicate provider records with separate services on each record.==

- Once you save this provider with the associated service classes, they cannot be removed.   If you enter a class by mistake, use the Prompt on Save trick to leave the screen without saving.

- There is NO facility to remove any information once a provider is entered and saved. Contractors no longer providing services for the AAA are to be inactivated. If a provider later contracts with your agency again – you will deselect "Inactivate provider".

2.4 ADD SITE. (STEP 4.)

Log into OA using the RACF ID and password assigned to you by DHS.

After entering a provider, you must enter a site for them to provide services.

To get to the Site Maintenance area:

1. <Click> **Select** on the upper menu.

2. <Click> **Housekeeping** on the dropdown menu.

3. <Click> **Maintain OAA Sites** in the second dropdown menu.
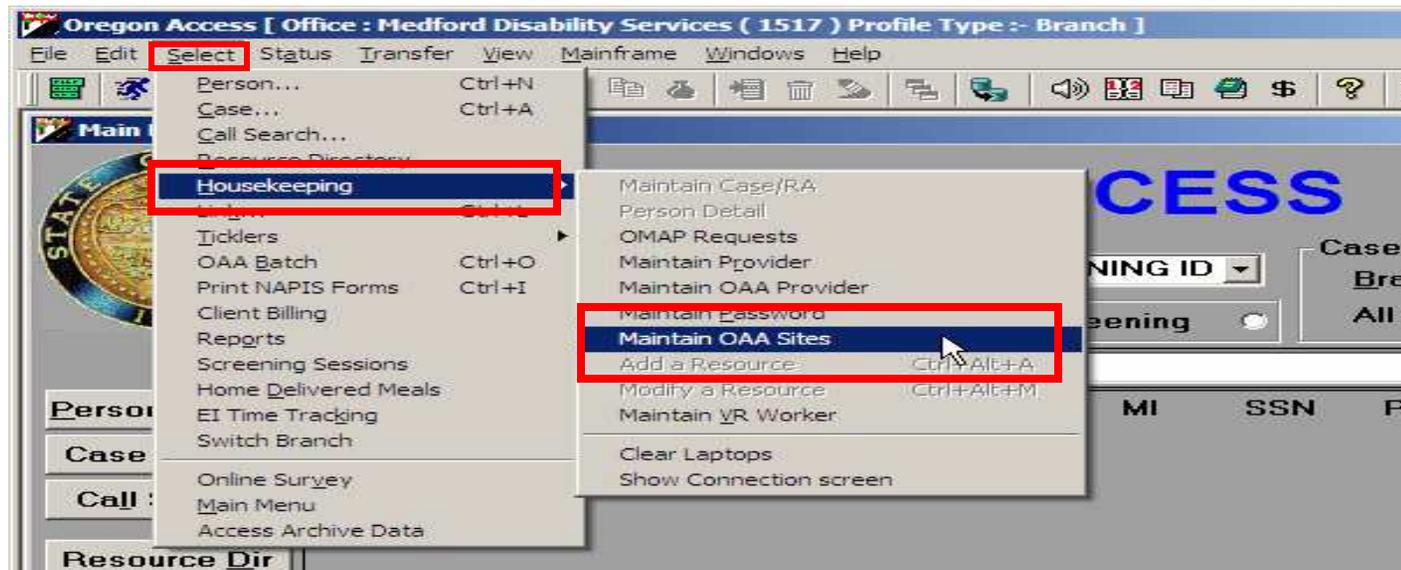
FIGURE 13 OAA SITE MAINTENANCE SELECTION

The following screen will be displayed. For a new District/Branch, the Site List and associated information will be blank.

AAA's have been allowed to determine the structure they wish their OAA sites to be. **DHS recommends that you use a structure such as create a Site name for each community within your district and then under that site you will associate each Provider that provides services within that community.**
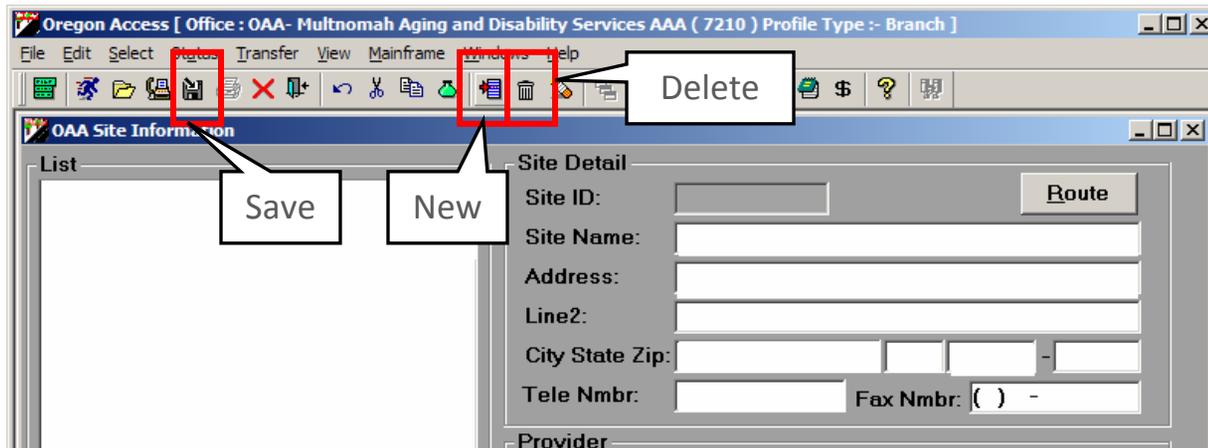
FIGURE 14 OAA SITE SELECTION SCREEN

This **OAA Site Information** screen applies to a district and all the branches associated with it.   When beginning with a new District/Branch, type the **Site Name**, **Address**, **City**, **State, Zip, Tele Nmbr** and **Fax Nmbr.**

<Click> **Save.** This will create the first location. To add additional sites, <Click> **New.**

The **Site Detail** information will be blank so that you can enter the next site information.   Continue this until you have added all the location information for your district. It will look similar to the List below.
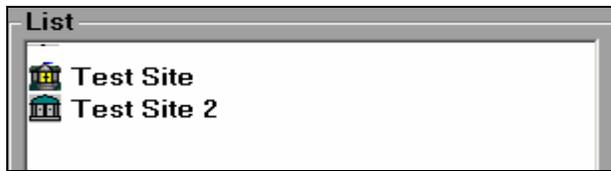
FIGURE 15 OAA SITE DETAIL SCREEN

<Click> **Save** when you have added your last site.

If you should create a location with an error, you may delete it by highlighting it and <Click> **Delete**. If you have added services at a location, you must first delete them and then you can delete the site.

2.5 ADD SERVICES (CLASSES) TO SITE. (STEP 5.)

After adding locations, highlight a location then <Click> **Add** and an **OAA Provider Search** screen will allow you to search for services.
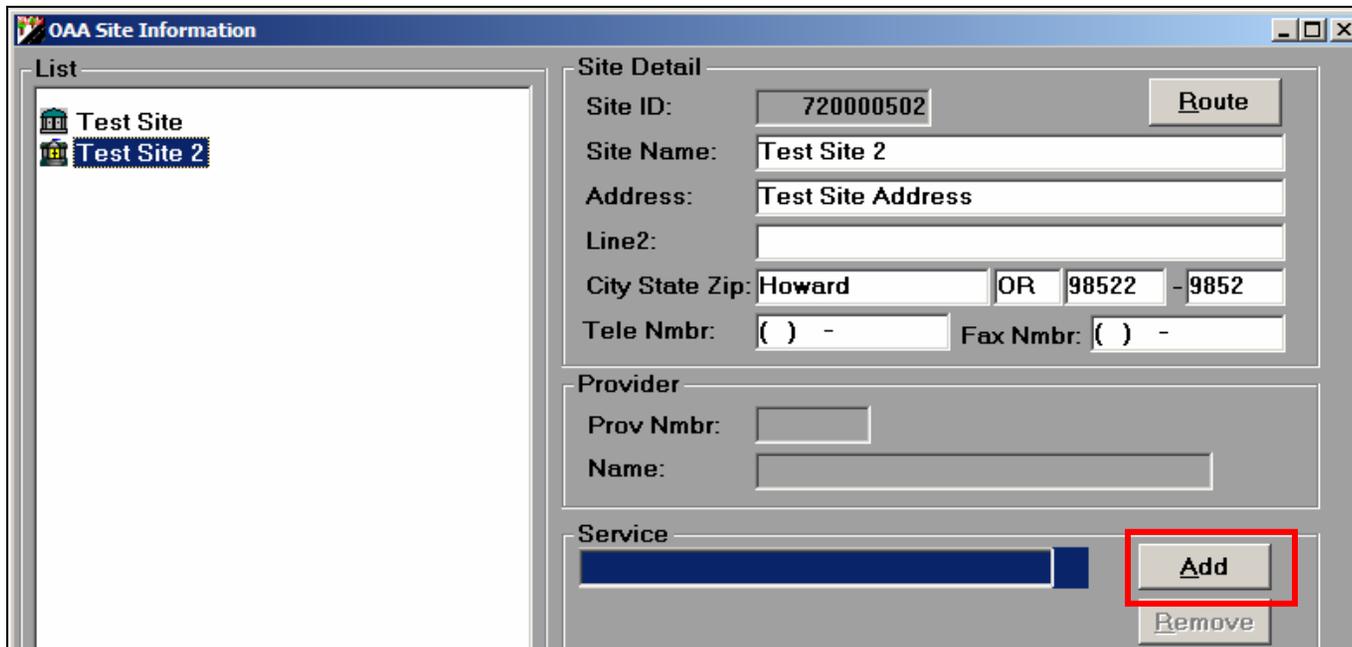
FIGURE 16 OAA SITE DETAIL SCREEN

Highlight the Provider you wish to use and select the provider that will provide services at this location.   Then <Click> **Add to Site.**

FIGURE 17 OAA SITE DETAIL SCREEN

FIGURE 18 OAA SITE DETAIL SCREEN

Notice that adding the provider brought all the services the provider offers to the site.

2.6 ADD QUALIFIERS. (STEP 6.)

Qualifiers are a wonderful way to delineate between variations of a single service. An example would be adding multiple qualifiers under Home-Delivered Services. Perhaps your AAA serves frozen, shelf-stable, standard, low-salt, diabetic, and non-dairy meals. Using multiple qualifiers will allow you to pull more detailed performance reports with client numbers and service unit breakdowns of each qualifier for a particular period.

Once you have added a service to a location, you will need to add at least the STANDARD qualifier for that service.

FIGURE 19 OAA RATES SCREEN SELECTION

From the **OAA Site Information** screen, <Click> **Qualifier/Rates** to get to the next screen.

FIGURE 20 OAA RATES SCREEN

The Qualifiers appropriate for that service will be loaded into the drop-down box. Multiple qualifiers can be added for each service. Once added, you may enter a start date, end date and a rate but they are not required. The rates and dates are used in the OA Billing module.

This is a good place to differentiate different types of the same service. IE Home Delivered Meals could be Frozen, Fresh, Shelf-Stable, OPI or Medicaid. Then you can select the qualifier to produce reports for various uses.

2.7 ADD ROUTES TO SERVICES. (STEP 7.)

If this service has defined routes for service delivery, such as Home Delivered Meals, you can set up different routes so delivery is optimized. To add routes for a service, select the provider and service then <Click> **Route**.

FIGURE 21 OAA ADDING ROUTES

This will display a popup box where you may enter Route numbers.

FIGURE 22OAA ROUTE ENTRY

Enter the Route information in the **Description** box. Use the Insert button to add additional lines. Enter as many as needed for all the routes then <Click> **Close** to return to the **OAA Site Information** screen.   At this point, you will have completed setting up all Providers, Sites and Services for your District. You can now go select a client, go into your **OAA Svc/FCSP** screen and add services.

APPENDIX A – SAMPLE DISTRICT-BRANCH TABLE

DIST	DIST_Desc	Branch	BR_OFF_Desc
001	Dist 001 - Clatsop, Tillamook, Marion, Polk, Yamhill	411	Gearhart Aging
001	Dist 001 - Clatsop, Tillamook, Marion, Polk, Yamhill	417	Gearhart Disability
001	Dist 001 - Clatsop, Tillamook, Marion, Polk, Yamhill	2911	Tillamook Aging
001	Dist 001 - Clatsop, Tillamook, Marion, Polk, Yamhill	2912	MWVSSA Tillamook
001	Dist 001 - Clatsop, Tillamook, Marion, Polk, Yamhill	2917	Tillamook Disability
003	Dist 003 - Marion, Polk, Yamhill	1911	Woodburn Aging
003	Dist 003 - Marion, Polk, Yamhill	1917	Woodburn Disability
003	Dist 003 - Marion, Polk, Yamhill	2411	N Salem Aging
003	Dist 003 - Marion, Polk, Yamhill	2412	South Salem Aging - NWSDS
003	Dist 003 - Marion, Polk, Yamhill	2417	South Salem Disability
003	Dist 003 - Marion, Polk, Yamhill	2418	North Salem Disability
003	Dist 003 - Marion, Polk, Yamhill	2711	Dallas Aging
003	Dist 003 - Marion, Polk, Yamhill	2712	Dallas Disability
003	Dist 003 - Marion, Polk, Yamhill	3617	McMinville Disability
003	Dist 003 - Marion, Polk, Yamhill	7310	Northwest Senior & Disability Services
004	Dist 004 - Linn, Benton, Lincoln	2111	OCWCOG Lincoln County Senior Services
004	Dist 004 - Linn, Benton, Lincoln	2117	OCWCOG Lincoln County Disability Services
004	Dist 004 - Linn, Benton, Lincoln	2211	OCWCOG Linn/Benton County Senior Services
004	Dist 004 - Linn, Benton, Lincoln	2217	OCWCOG Linn/Benton County Disability Srvs
004	Dist 004 - Linn, Benton, Lincoln	2219	OCWCOG Lebanon Disability Services
004	Dist 004 - Linn, Benton, Lincoln	7410	OAA- OR Cascades West COG AAA
005	Dist 005 - Lane	2011	LCOG - Eugene AAA
005	Dist 005 - Lane	2015	LCOG - Springfield
005	Dist 005 - Lane	2017	LCOG - Eugene DSO
005	Dist 005 - Lane	2019	LCOG - Cottage Grove
005	Dist 005 - Lane	3211	LCOG - Florence
005	Dist 005 - Lane	7510	OAA- Lane COG - Senior and Disability Services AAA
006	Dist 006 - Douglas	1011	Douglas County SSD
006	Dist 006 - Douglas	1015	Reedsport
006	Dist 006 - Douglas	1017	Roseburg Disability Services
006	Dist 006 - Douglas	7610	OAA- Douglas Co Senior Services Division AAA
007	Dist 007 - Coos, Curry	611	Coos Bay Senior & Disabled Services
007	Dist 007 - Coos, Curry	612	Coos Bay AAA
007	Dist 007 - Coos, Curry	613	Coquille MSO
007	Dist 007 - Coos, Curry	811	Senior and Disabled Services Division
007	Dist 007 - Coos, Curry	812	Curry OPI
007	Dist 007 - Coos, Curry	1715	Brookings/Harbor Senior & Disabled Services

DIST	DIST_Desc	Branch	BR_OFF_Desc
007	Dist 007 - Coos, Curry	7710	OAA- South Coast Business Employment Corp. AAA
008	Dist 008 - Jackson, Josephine	1513	Medford Senior Services Office
008	Dist 008 - Jackson, Josephine	1517	Medford Disability Services
008	Dist 008 - Jackson, Josephine	1717	Grants Pass Senior Services Office
008	Dist 008 - Jackson, Josephine	7810	OAA- Rogue Valley COG Senior and Disables Svcs. AAA
009	Dist 009 - Gilliam, Hood River	3311	The Dalles, SDSD
009	Dist 009 - Gilliam, Hood River	3312	Hood River, SDSD
009	Dist 009 - Gilliam, Hood River	3313	Mid-Columbia COG
009	Dist 009 - Gilliam, Hood River	7910	OAA- Mid-Columbia COG Senior and Disabled Svcs. AAA
010	Dist 010 - Crook, Deschutes	911	Dept. of Human Services
010	Dist 010 - Crook, Deschutes	912	Bend OPI
010	Dist 010 - Crook, Deschutes	913	Lapine Senior & Disabled Services
010	Dist 010 - Crook, Deschutes	914	Senior and Disabled Services Division
010	Dist 010 - Crook, Deschutes	1611	Senior and Disabled Services Division
010	Dist 010 - Crook, Deschutes	1612	Senior and Disabled Services Division
010	Dist 010 - Crook, Deschutes	8010	OAA- Central Oregon Council on Aging AAA
012	Dist 012 - Morrow	3011	Pendleton Senior & Disabled Services
012	Dist 012 - Morrow	3012	Capeco OPI
012	Dist 012 - Morrow	3013	Hermiston MSO
012	Dist 012 - Morrow	3014	Milton-Freewater Senior & Disabled Services
012	Dist 012 - Morrow	8210	OAA- Community Action Program East Central Oregon (CAPECO) A
013	Dist 013 - Union, Baker, Wallowa & Grant	111	Baker City SPD
013	Dist 013 - Union, Baker, Wallowa & Grant	112	Baker Help
013	Dist 013 - Union, Baker, Wallowa & Grant	3111	La Grande Branch Senior & Disabled Svc Div
013	Dist 013 - Union, Baker, Wallowa & Grant	3112	Enterprise Senior & Disabled Services
013	Dist 013 - Union, Baker, Wallowa & Grant	3113	Union CCNO
013	Dist 013 - Union, Baker, Wallowa & Grant	3114	Wallowa Help
013	Dist 013 - Union, Baker, Wallowa & Grant	8310	OAA- Community Connection of NE Oregon AAA
013G	Dist 013G - Grant	1211	John Day Senior & Disabled Services
013G	Dist 013G - Grant	9010	OAA- Grant County Seniors AAA
11K	Dist 11K - Klamath	1811	Klamath Falls MS
11K	Dist 11K - Klamath	1812	Klamath AAA
11K	Dist 11K - Klamath	8110	OAA- Klamath Basin Senior Citizens Council AAA
11L	Dist 11L - Lake	1813	Lakeview AAA
11L	Dist 11L - Lake	1814	Lakeview MS
11L	Dist 11L - Lake	8910	OAA - Lake County Seniors
14H	Dist 14H - Harney	1311	Burns Senior & Disabled Services
14H	Dist 14H - Harney	1312	Burns OPI
14H	Dist 14H - Harney	8410	OAA- Harney County Senior Center AAA

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DIST	DIST_Desc	Branch	BR_OFF_Desc
14M	Dist 14M - Malheur	2311	Ontario Senior & Disabled Services
14M	Dist 14M - Malheur	2312	Malheur OPI
14M	Dist 14M - Malheur	8510	OAA- Malheur Council on Aging AAA
2CL	Dist 2CL - Clackamas	312	Clackamas County Social Services
2CL	Dist 2CL - Clackamas	8610	OAA- Clackamas County Social Services AAA
2CO	Dist 2CO - Columbia	511	St. Helens Senior & Disabled Services
2CO	Dist 2CO - Columbia	512	Community Action Team
2CO	Dist 2CO - Columbia	8710	Community Action Team
2MU	Dist 2MU - Multnomah	1411	Southeast Aging Services Br.
2MU	Dist 2MU - Multnomah	1412	Impact OPI
2MU	Dist 2MU - Multnomah	1417	Southeast Portland Disability Services
2MU	Dist 2MU - Multnomah	1418	SE Aging & Disability Services
2MU	Dist 2MU - Multnomah	2511	Aging Services Dept - West Branch
2MU	Dist 2MU - Multnomah	2512	Friendly HSE
2MU	Dist 2MU - Multnomah	2513	NW Pilot OPI
2MU	Dist 2MU - Multnomah	2514	Neighbor HSE
2MU	Dist 2MU - Multnomah	2517	West Portland Disability Services
2MU	Dist 2MU - Multnomah	2518	West Area Aging and Disability Services
2MU	Dist 2MU - Multnomah	2617	North Portland Disability Services Office
2MU	Dist 2MU - Multnomah	2812	Urban League
2MU	Dist 2MU - Multnomah	2813	YWCA St John
2MU	Dist 2MU - Multnomah	2814	Hollywood
2MU	Dist 2MU - Multnomah	2818	North/Northeast Portland AAA
2MU	Dist 2MU - Multnomah	3511	Multnomah ADS Nursing Facility
2MU	Dist 2MU - Multnomah	3512	IRCO Senior District Center
2MU	Dist 2MU - Multnomah	3515	Mid County Aging and Disability Services
2MU	Dist 2MU - Multnomah	3517	Mid Aging and Disability Services
2MU	Dist 2MU - Multnomah	3518	East Area Aging and Disability Services
2MU	Dist 2MU - Multnomah	3519	E Mult DO-YW
2MU	Dist 2MU - Multnomah	7210	OAA- Multnomah Aging and Disability Services AAA
2WA	Dist 2WA - Washington	3411	Hillsboro DAVS
2WA	Dist 2WA - Washington	3412	Wash Cty OPI
2WA	Dist 2WA - Washington	3415	Tigard DAVS
2WA	Dist 2WA - Washington	3417	Beaverton DAVS
2WA	Dist 2WA - Washington	3419	Beaverton Senior Resource Center
2WA	Dist 2WA - Washington	8810	OAA- Washington Co. Dept. of Aging and Veterans Services AAA