

Oregon Project Independence – Medicaid (OPI-M) Asset Verification System (AVS) Web Portal Guide

Updated: Sept. 8, 2026

Table of Contents

Table of Contents	1
Purpose	2
What is AVS?	2
Consent	3
Logging into AVS.....	4
Applicant Information - important fields	6
Applicant Information - important fields:	8
Adding a spouse to a case	8
Spouse Information - important fields.....	9
Adding banks to the AVS request	9
Viewing AVS response	13
Closing AVS request.....	16

Results After Decision Queue..... 17

Adverse action notice 18

Resources..... 18

Purpose

This QRG assists workers determining financial eligibility to:

- Describe the AVS process in the web portal.
- Navigate in AVS and use the AVS web portal system for OPI-M financial eligibility.

NOTE: This worker guide is only for OPI-M use.

What is AVS?

AVS stands for Asset Verification System. AVS only checks for some resources. AVS returns information held at banks and credit unions, as well as real property records nationwide. AVS does not return information held at investment banks or other assets.

AVS must be run manually at initial application and renewal for OPI-M. Use the OPI-M Request Type to ensure the correct look back period and resource limit is used. OPI-M has a two year continuous eligibility period, which is when AVS must be run at renewal. If AVS is run in ONE for the same look back period, and

the same known banks/credit unions, AVS does not need to be run again outside of ONE for OPI-M. This will prevent duplicate requests.

AVS must be allowed to process for 15 calendar days. You will see it processing in the Case Status section. The Central Office Financial Eligibility (CO FE) Team or the Eligibility Case Manager (ECM) at a Type B AAA need to track pending AVS requests, such as setting custom ticklers in Oregon ACCESS.

AVS has three steps in searching for relevant financial institutions for the individual and their spouse.

1. 12 large institutions are automatically searched. They are listed at the top of the participating [Financial Institutions document](#).
2. “Geo-Search” will look at financial institutions near the individual’s area and will add them to the request.
3. AVS picks up any additional financial institutions that are added as “Known Accounts.”

Note: AVS searches for real property automatically on every request.

Consent

AVS is a requirement of the applicant’s eligibility. They cannot waive consent by providing bank statements. We must receive consent on a [MSC 2639](#) using a wet signature or DocuSign. Consent is a condition of eligibility for any program that requires AVS. This means that if an individual refuses AVS and they are applying for a program that requires it, they will be denied.

AVS consent is optional for a non-applying spouse, however AVS helps speed up the eligibility process and lessens the burden of providing other verification. If a legally married, non-applying spouse refuses AVS

consent, the non-applying spouse may have to provide up to 5 years of financial records. Verifying resources is a requirement for all legally married couples, regardless of separation or living arrangement. In cases of domestic violence concerns, please staff with OPI-M Policy at [OPI-M Questions, Support and Feedback](#).

Logging into AVS

For OPI-M, the access is through the AVS web portal at this link: <https://or.pcgusavs.com/>.

- You must be connected securely to the internet, either by being in an office or using VPN/Citrix.
- Your login is your OR or P Number and your password is set up by you.

The AVS home screen will show up as the AVS Case Queue.

Asset Verification Service

PUBLIC
CONSULTING GROUP
Solutions that Matter

USERNAME
Username

PASSWORD
Password

Login

[I forgot my password](#)

By accessing this system, you are confirming that you have permissible purpose to do so and you agree to only use this system in a manner compliant with all applicable federal and state laws and requirements. All system activity is logged and monitored and unauthorized use of this system is prohibited.

COPYRIGHT © 2010-2024 PUBLIC CONSULTING GROUP. ALL RIGHTS RESERVED.
VERSION 95.0

AVS Case Queue

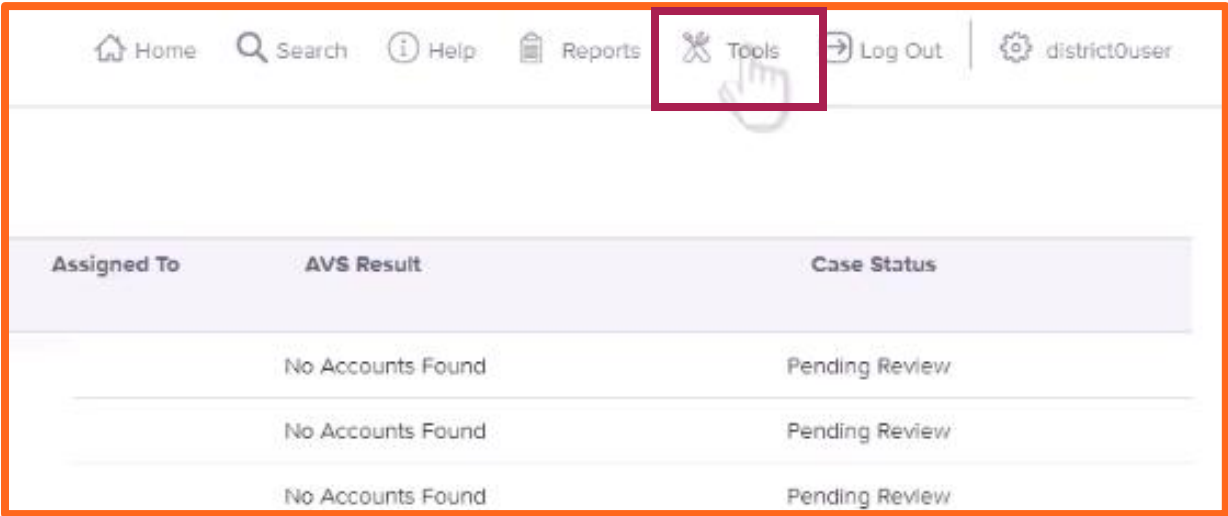
2938 Cases

Navigation: Home, Search, Help, Reports, Tools, Log Out, @districtUser

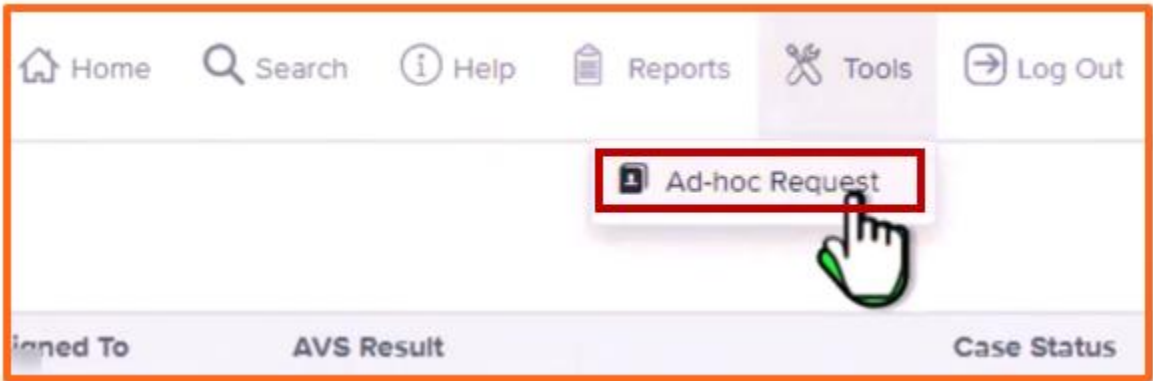
	Request Date	Request Type	Case Type	HH Size	Case Name	Case/Reg #	Assigned To	AVS Result	Case Status
☐ Edit	04/25/2023	OSIPM	Renewal	1	BAUTISTACHEVEZ, OSCAR J	[redacted]	[redacted]	No Accounts Found	Pending Review
☐ Edit	04/25/2023	OSIPM	Renewal	1	BATZNER SCHM, FREDERICK C	[redacted]	[redacted]	No Accounts Found	Pending Review

Submitting and AVS request

- 1. Select Tools tab at the top of the screen



- 2. Then, select ad hoc Request



3. Applicant information

- a. **Note:** The sections that have red boxes around them are required fields within the ad hoc request. See next page for more information on what is required.
- b. Once all sections are completed, select Run.

Applicant Information - important fields

The screenshot displays the 'Applicant Information' form in the AVS Web Portal. The form is organized into several sections, each with a blue header. Red boxes are drawn around specific fields to indicate they are required for an ad hoc request. The sections and their fields are as follows:

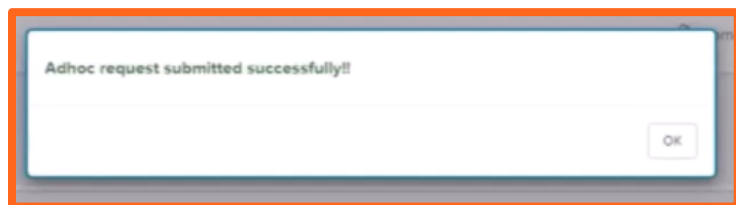
- Application Information:**
 - Applicant Type (dropdown menu, required)
 - Application or Renewal? (dropdown menu, required)
- Program Information:**
 - Region (dropdown menu, required)
 - Request Type (dropdown menu, required)
 - Household Size (dropdown menu, required)
- Worker Information:**
 - District (dropdown menu, required)
 - Office (text field, required)
 - Unit (text field)
 - Worker (text field)
- Applicant Information:**
 - First Name (text field, required)
 - Middle Name (text field)
 - Last Name (text field, required)
 - Social Security Number (text field, required)
 - Gender (dropdown menu)
 - Date of Birth (text field, required, format MM/DD/YYYY)
 - Application Date (text field, required, format MM/DD/YYYY)
 - Institutionalization Date (text field, format MM/DD/YYYY)
- Applicant Address Information:**
 - Residence Street (text field, required)
 - House/Apt# (text field)
 - City (text field, required)
 - State (dropdown menu, required)
 - Postal Code (text field, required)
 - Mailing Street (text field)
 - House/Apt# (text field)
 - City (text field)
 - State (dropdown menu)
 - Postal Code (text field)
 - Check if mailing address is same as residence (checkbox)
- Case Information:**
 - CIN (text field)
 - Case Name (text field, required)
 - Case # (text field)
 - Registry # (text field, required)
 - Applicant SSN to Link (text field)

At the bottom right of the form, there are two buttons: 'Cancel' and 'Run Request' (which is highlighted with a red box).

Required sections	What is needed
Applicant Type	Applicant (If both spouses are applying, it does not matter who you select as the applicant and who is the spouse.)
Application or Renewal	Application: for new applicants Renewal: Redeterminations
Request Type	OPI-M
Household Size	Select 1 or 2. If you need to also request AVS for a spouse you must select 2. You cannot add a spouse to a household size of 1. This is important as it will cause an error if not selected correctly.
District and Office	Select only your District and Office (branch) from the drop-down. You do not need to select Unit or Worker, this information is not necessary.
First and Last Name	First and Last Name
Social Security Number	No dashes for SSN
Date of birth	MM/DD/YYYY
Application Date	For new/initial applications, use the Date of Request. For renewals, use the first of the month in which you are submitting the renewal request. This field will drive the start date for the look-back.
Residence Address	Address of the applicant
Case Name	Enter in this format: Last Name, First Name
Registry #	SSN without dashes
Run Request	Click to submit the AVS request.

Applicant Information - important fields:

When submitted successfully, you will see a pop-up indicating the request was submitted successfully.



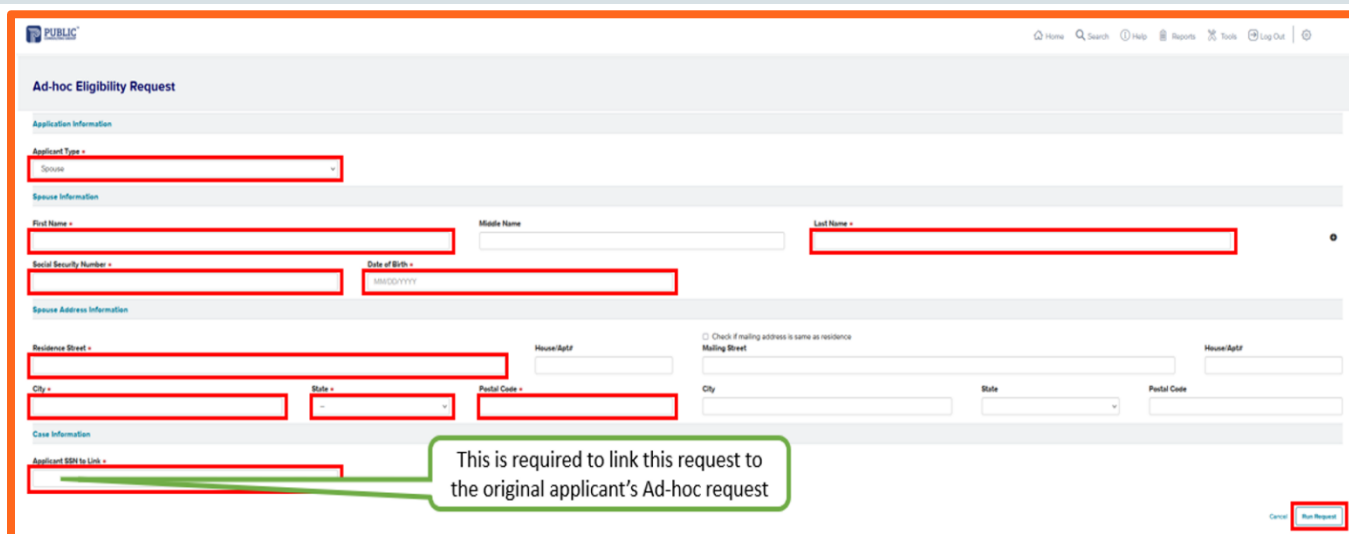
Search the case queue once submitted AVS request to ensure no errors are on the case. Narrate the AVS submission in Oregon ACCESS.

If you need to add a spouse to a case, you will need to do another Ad hoc Request.

Adding a spouse to a case

After clicking Run Request for the applicant, a green box will appear at the top indicating that the request was submitted. To add the spouse, click Tools and Ad hoc Request to open a new request.

Use the Applicant SSN to Link field to link to the original applicant's ad hoc request.

A screenshot of the "Ad-hoc Eligibility Request" form in the PUBLIG system. The form is divided into sections: "Application Information", "Spouse Information", "Spouse Address Information", and "Case Information". Red boxes highlight the "Applicant Type" dropdown (set to "Spouse"), the "First Name", "Middle Name", and "Last Name" fields, the "Social Security Number" and "Date of Birth" fields, the "Residence Street", "City", "State", and "Postal Code" fields, and the "Applicant SSN to Link" field. A green callout box with a pointer to the "Applicant SSN to Link" field contains the text: "This is required to link this request to the original applicant's Ad-hoc request". The "Run Request" button is highlighted with a red box at the bottom right. The form also includes a "Cancel" button and a "Check if mailing address is same as residence" checkbox.

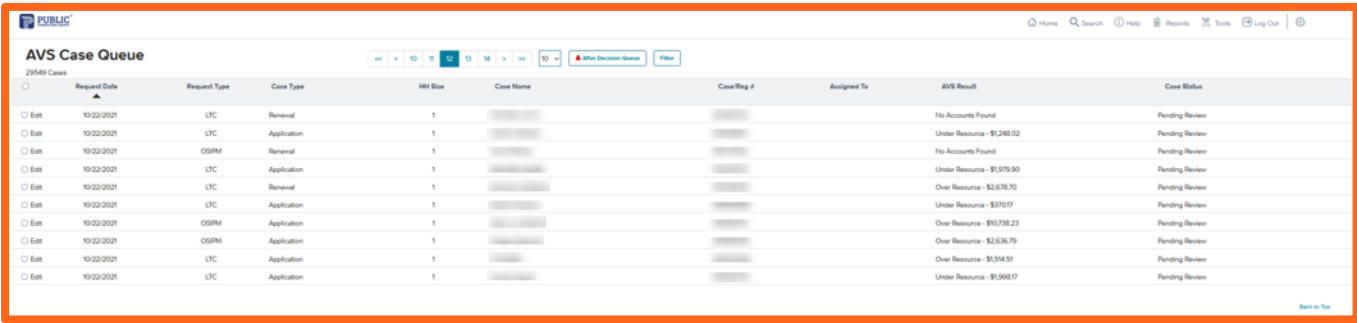
Spouse Information - important fields

Required sections	What is needed
Applicant Type	Spouse
Spouse Information	First Name, Last Name, Social Security Number (no dashes), Date of Birth, Spouse's Address Information
Applicant SSN to link	This field is mandatory because you must enter the applicant's SSN to link this request to the original ad hoc request.
Run Request	Click to submit request and link to spouse of applicant's AVS record.

Adding banks to the AVS request

Once the AVS request is submitted, you will want to add the “known accounts.”

1. From the AVS Case Queue, search and select the desired AVS request.



The screenshot shows the 'AVS Case Queue' interface. At the top, there's a header with 'PUBLIC' and navigation links like Home, Search, Help, Reports, Tools, Log Out. Below the header, there's a sub-header 'AVS Case Queue' with a filter icon and a 'Filter' button. The main table has columns: Request Date, Request Type, Case Type, ERI Size, Case Name, CaseReg #, Assigned To, AVS Result, and Case Status. The table contains 10 rows of data, each representing a case. The 'Case Name' column is redacted with a grey box. The 'AVS Result' column shows various outcomes like 'No Accounts Found', 'Under Resource', and 'Over Resource'. The 'Case Status' column shows 'Pending Review' for all cases.

Request Date	Request Type	Case Type	ERI Size	Case Name	CaseReg #	Assigned To	AVS Result	Case Status
10/22/2021	LTC	Renewal	1	[Redacted]	[Redacted]	[Redacted]	No Accounts Found	Pending Review
10/22/2021	LTC	Application	1	[Redacted]	[Redacted]	[Redacted]	Under Resource - \$1,348.02	Pending Review
10/22/2021	OSPM	Renewal	1	[Redacted]	[Redacted]	[Redacted]	No Accounts Found	Pending Review
10/22/2021	LTC	Application	1	[Redacted]	[Redacted]	[Redacted]	Under Resource - \$1,979.90	Pending Review
10/22/2021	LTC	Renewal	1	[Redacted]	[Redacted]	[Redacted]	Over Resource - \$2,676.70	Pending Review
10/22/2021	LTC	Application	1	[Redacted]	[Redacted]	[Redacted]	Under Resource - \$3,701.07	Pending Review
10/22/2021	OSPM	Application	1	[Redacted]	[Redacted]	[Redacted]	Over Resource - \$10,738.23	Pending Review
10/22/2021	OSPM	Application	1	[Redacted]	[Redacted]	[Redacted]	Over Resource - \$2,636.79	Pending Review
10/22/2021	LTC	Application	1	[Redacted]	[Redacted]	[Redacted]	Over Resource - \$1,514.51	Pending Review
10/22/2021	LTC	Application	1	[Redacted]	[Redacted]	[Redacted]	Under Resource - \$1,598.17	Pending Review

2. Once inside the case, you select Account Information.



Home

Search

Help

Reports

Tools

Log Out

districtUser

Oregon Sample

CASE NAME: Sample

APPLICATION DATE

October 10, 2018

REQUEST DATE

December 10, 2018

Spouse Sample

CURRENT CASE STATUS

Pending Review

Select Case Status

▼

Update Status

Initiate New Ad-hoc Request

8972 Forest Dr

Salem, OR 97001

Applicant DOB

9/14/1965

Applicant SSN

487-62-6736

Spouse DOB

2/16/1963

Spouse SSN

647-38-2762

CASE #

Registry #

487626736

RESOURCE LIMIT

\$3,000.00

CURRENT

\$34,687.00

SPOUSE RESOURCES

\$0.00

AVS Result

Over Resource

APPLICATION INFORMATION

OREGON SUPPLEMENTAL INCOME PROGRAM-MEDICAL APPLICATION

ACCOUNT INFORMATION

\$34,687.00

PROPERTY INFORMATION

\$165,900.00

AVS SUMMARY

2 - OVER RESOURCE

FLAGGED TRANSFERS

ELIGIBILITY HISTORY

0

Account Information

Account View

Month View

5 Accounts Found

Total Liquid Assets as of October 2018 - \$34,687.00

Countable Accounts

Account Owner: SAMPLE, OREGON; SAMPLE, SPOUSE

WELLS FARGO - (6332108970)

109 COMMERCIAL ST NE, SALEM, OR 97001

Checking

Balance as of October 2018 - \$34,687.00

Refresh Date: December 10, 2018

Account Owner: SAMPLE, OREGON

BANK OF AMERICA - (772108970)

109 COMMERCIAL ST NE, SALEM, OR 97001

IRA

Balance as of October 2018 - \$3,000.00

Refresh Date: December 10, 2018

Account Owner: SAMPLE, OREGON

BANK OF OREGON - (772108970)

109 COMMERCIAL ST NE, SALEM, OR 97001

Burial Funeral

Balance as of October 2018 - \$29,000.00

Refresh Date: December 10, 2018

+ Add Bank(s) for Verification

4. On the Search Bank screen, you need to fill out the highlighted sections and select only one branch from the list. Then select Save. Make sure to select the correct spelling of the bank. See document [Top AVS Banks for Oregon](#).

Search Bank

Request For

RTN

Enter complete RTN

Institution Id

Institution Name

U.S. Bank

Address

City

Salem

State Code

Zip Code

97301

Reset

Search

Close

	Title	Address	City	State Code	ZIP
☐	U.S. Bank, National Association	1317 State St	Salem	OR	97301-2296
☐	U.S. Bank, National Association	302 State St	Salem	OR	97301-3532
☐	U.S. Bank, National Association	3955 Center St NE	Salem	OR	97301-2937

Save

Close

5. Then you see the Known Banks in the Verification Requests section.

Verification Requests

Sunset Science Park FCU

(Applicant)

Verification Requested: 10/22/2021

Sunset Science Park FCU

(Spouse)

Verification Requested: 10/22/2021

Viewing AVS response

1. On the AVS Case Queue, select Search.

Home Search Help Reports Tools Log Out

AVS Case Queue

29549 Cases

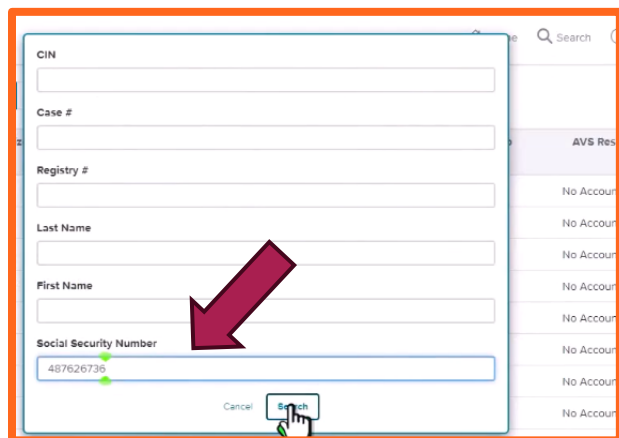
<< < 10 11 12 13 14 > >>

After Decision Queue Filter

☐	Request Date	Request Type	Case Type	HH Size	Case Name	Case/Reg #	Assigned To	AVS Result	Case Status
☐ Edit	10/22/2021	LTC	Renewal	1				No Accounts Found	Pending Review
☐ Edit	10/22/2021	LTC	Application	1				Under Resource - \$1,248.02	Pending Review
☐ Edit	10/22/2021	OSIRM	Renewal	1				No Accounts Found	Pending Review
☐ Edit	10/22/2021	LTC	Application	1				Under Resource - \$1,979.90	Pending Review
☐ Edit	10/22/2021	LTC	Renewal	1				Over Resource - \$2,678.70	Pending Review
☐ Edit	10/22/2021	LTC	Application	1				Under Resource - \$370.17	Pending Review
☐ Edit	10/22/2021	OSIRM	Application	1				Over Resource - \$10,738.23	Pending Review
☐ Edit	10/22/2021	OSIRM	Application	1				Over Resource - \$2,636.79	Pending Review
☐ Edit	10/22/2021	LTC	Application	1				Over Resource - \$1,514.51	Pending Review
☐ Edit	10/22/2021	LTC	Application	1				Under Resource - \$1,998.17	Pending Review

Back to Top

2. Search by Social Security Number, no dashes.



The screenshot shows a search form with the following fields: CIN, Case #, Registry #, Last Name, First Name, and Social Security Number. The Social Security Number field contains the value '487626738'. A red arrow points to this field. Below the fields are 'Cancel' and 'Search' buttons. A hand cursor is over the 'Search' button. To the right of the form, a table is partially visible with the header 'AVS Res' and several rows containing 'No Account'.

3. Review the five boxes of information (Application Information, Account Information, Property Information, AVS Summary, Eligibility History). While reviewing the information, take note of any flags and changes in account balance.

If you notice any issues such as flags or significant changes in account history, contact the applicant and ask about what you are seeing. For example, “In reviewing some information, I see that there was \$50,000 taken out of your bank account. Can you tell me a little bit about what happened to that \$50,000.” You may need to pend the individual for more information.

Public

Oregon Sample
CASE NAME: Sample
APPLICATION DATE: October 10, 2018
REQUEST DATE: December 10, 2018

Spouse Sample
CURRENT CASE STATUS: Pending Review
Select Case Status:
Update Status

Initiate New Ad-hoc Request

8972 Forest Dr
Salem, OR 97001

Applicant DOB: 9/14/1965
Applicant SSN: 487-62-5736
Spouse DOB: 2/16/1963
Spouse SSN: 647-38-2762
CASE #
Registry # 487626736

RESOURCE LIMIT: \$3,000.00
CURRENT: \$34,687.00
SPOUSE RESOURCES: \$0.00
AVS Result: Over Resource

1 APPLICATION INFORMATION
OREGON SUPPLEMENTAL INCOME PROGRAM-MEDICAL APPLICATION

2 ACCOUNT INFORMATION
\$34,687.00

3 PROPERTY INFORMATION
\$185,900.00

4 AVS SUMMARY
2 - OVER RESOURCE
FLAGGED TRANSFERS

5 ELIGIBILITY HISTORY
0

Home Search Help Reports Tools Log Out districtUser

Account Information
Account View Month View

5 Accounts Found Total Liquid Assets as of October 2018 - \$34,687.00

+ Add Bank(s) for Verification

Countable Accounts

Account Owner: SAMPLE, OREGON; SAMPLE, SPOUSE
WELLS FARGO - (6332108970)
109 COMMERCIAL ST NE, SALEM, OR 97001
Checking Account
Balance as of October 2018 - \$1,987.00
Refresh Date: December 10, 2018

Account Owner: SAMPLE, OREGON
BANK OF AMERICA - (772108970)
109 COMMERCIAL ST NE, SALEM, OR 97001
IRA
Balance as of October 2018 - \$3,000.00
Refresh Date: December 10, 2018

Account Owner: SAMPLE, OREGON
BANK OF OREGON - (772108970)
109 COMMERCIAL ST NE, SALEM, OR 97001
Burial Funeral
Balance as of October 2018 - \$29,000.00
Refresh Date: December 10, 2018

Closing AVS request

Once you have reviewed the AVS request it is important to close the request so that it is moved out of the AVS case queue. This will not delete the request; it will be archived and remain searchable. It will also be attached to any future requests for the same individual.

1. Search and find the request from the AVS Case Queue screen.
2. Click on the Edit box at the far left of the request.
3. Click Decide at the top of the AVS Case list.
4. Select Close/Withdrawn.
5. Click Save on the right. You must click Save for this to take effect.

The screenshot shows the AVS Case Queue interface. At the top, there's a navigation bar with 'PUBLIC CONSULTING GROUP' logo and links for Home, Search, Help, Reports, Tools, Log Out, and a settings icon. Below this, the 'AVS Case Queue' section shows '29551 Cases' and '1 Case selected'. A pagination bar includes navigation arrows, page numbers (13, 14, 15, 16, 17), a dropdown for '25', and buttons for 'After Decision Queue' and 'Filter'. On the left, there are buttons for 'Assign', 'Decide' (highlighted with a green box and a purple circle with '3'), and a 'Select Case Status' dropdown menu (highlighted with a purple circle with '4') which has 'Close/Withdrawn' selected. On the right, there are 'Save' (highlighted with a green box and a purple circle with '5') and 'Cancel' buttons. The main table has columns: Request Date, Request Type, Case Type, HH Size, Case Name (highlighted with a purple circle with '1'), Case/Reg #, Assigned To, AVS Result, and Case Status. The first row of data shows a request for 'HALL, JAMES' with status 'Pending Review'. The 'Edit' button for this row is highlighted with a green box and a purple circle with '2'. The second row shows a request for 'SMITH, VICTOR' with status 'Pending Review'.

	Request Date	Request Type	Case Type	HH Size	Case Name	Case/Reg #	Assigned To	AVS Result	Case Status
☒ Edit	01/05/2022	OSIPM	Application	1	HALL, JAMES	Individual's SSN		Under Resource - \$786.31	Pending Review
☐ Edit	01/03/2022	LTC	Application	1	SMITH, VICTOR	Individual's SSN		Over Resource - \$2,842.52	Pending Review

Results After Decision Queue

At the top of the AVS Case Queue screen you will see button marked “after decision queue.”

AVS Case Queue

29551 Cases

	Request Date	Request Type	Case Type	HH Size	Case Name	Case/Reg #	Assigned To	AVS Result
--	--------------	--------------	-----------	---------	-----------	------------	-------------	------------

Click this to open the Results After Decision Queue. Here you will find requests that had additional information returned **after** the request was closed, meaning we did not see this information when it was reviewed originally. Local offices should develop a process to review this queue regularly and follow up with the individual on any discrepant or undisclosed information as necessary. Make sure to close the request in this queue following the same steps discussed previously.

AVS Results After Decision Queue

524 Cases

	Request Date	Request Type	Case Type	HH Size	Case Name	Case/Reg #	Reviewer Assigned To	AVS Result
--	--------------	--------------	-----------	---------	-----------	------------	----------------------	------------

Adverse action notice

AVS is considered a consumer reporting agency, which means we must send a consumer reporting disclosure when we are taking adverse actions based on AVS results. Form [2379](#) must be included with the adverse action notice.

Resources

[Non-MAGI Financial Eligibility Staff Tools - Worker Helps - AVS](#): Resources for AVS in the Web portal

[Medical Asset Check via AVS QRG](#): Reviews how to check AVS and when AVS is required in ONE.

[OPI-M Training Series in Workday Learning](#)

Need this document in another format?

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact ODHS at apd.ltss@odhsoha.oregon.gov or at 503-945-5600 (voice/text). We accept all relay calls.