

# Case Manager Homepage and Case Alert Overview

July 28, 2025

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**Overview**

The Case Manager Homepage provides information to case managers about specific actions taken in ONE that may require the case manager’s attention.

The alerts that are shown on the Case Manager Homepage do not generate automatic notification to case managers in Oregon ACCESS. Case managers will need to go into ONE and review this information. It is recommended that the homepage be checked every day, or at least weekly, for changes occurring on the caseload.

By continually monitoring the Homepage, case managers can prevent provider payment issues and provide timely notice for adverse actions.

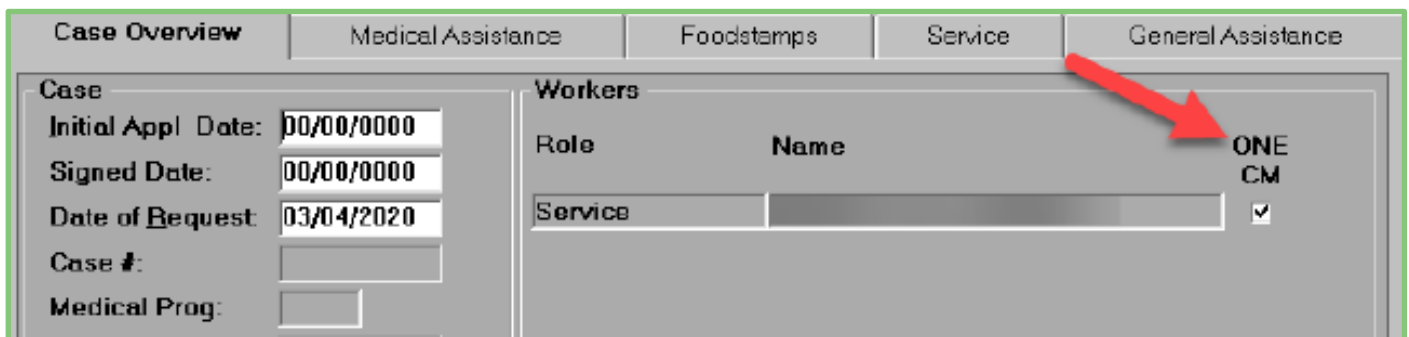
See the [Case Manager Alert Descriptions](#) document for a description of all the alerts.

## How Case Manager Information is Sent to ONE from Oregon ACCESS

Information about which case manager is assigned to a case is sent to ONE from Oregon ACCESS.

On the benefit screen in Oregon ACCESS on the Case Overview tab, case managers can see the Workers and their roles. The worker whose name has a checkmark in the ONE CM checkbox will have this individual on their caseload in ONE. Only one worker can have the ONE CM checkbox checked.

The ONE CM checkbox cannot be modified while the case is checked out in Remote



The screenshot shows the 'Case Overview' tab in the Oregon ACCESS system. On the left, there are fields for 'Case' information: 'Initial Appl Date' (00/00/0000), 'Signed Date' (00/00/0000), 'Date of Request' (03/04/2020), 'Case #' (empty), and 'Medical Prog' (empty). On the right, the 'Workers' section is displayed. It has a table with columns 'Role' and 'Name'. Below the table, there is a 'Service' dropdown menu and a 'ONE CM' checkbox. A red arrow points to the 'ONE CM' checkbox, which is checked. The 'General Assistance' tab is selected at the top.

The Primary Applicant on the case must be Client Index (CI) Registered, which assigns a prime number, for the information to be sent to ONE.

The ONE CM worker's Oregon ACCESS security profile must contain either an OR # or a P # for information to be sent to ONE.

If the ONE CM checkbox is checked but the case is not listed as assigned to the selected case manager on the Case Manager Homepage, please have the local security administrator verify that the case manager's OR# or P# in their Oregon ACCESS security profile is valid. Please take this step prior to submitting a [CA ticket](#) to the ONE Helpdesk.

Changes to the ONE case manager information accumulates during the day and is sent to ONE each evening. Keep in mind, the individual will not be displayed

on the My Case Load section of the new case manager's homepage until the next day.

### Accessing the Case Manager Alerts

There are two ways to access the case manager alerts in ONE: on the Case Manager Homepage or using the Case Manager Alert Log.

### Case Manager Homepage

When a case manager first logs into the ONE System, their Homepage will look similar to the screen capture below. There are two sections, Retrieve Cases and My Case Load.

### My Case Load

A case manager can see alerts on their Homepage by clicking the arrow to the left of My Case Load (outlined in a red box in the screen capture below). When the arrow faces down the case manager will see their case load and any alerts on the cases.

The screenshot shows the OregonOneEligibility Case Manager Homepage. At the top, there is a navigation bar with links like Home, Application/Case, Inbox, Inquiry, Correspondence, Tools, Benefit Management, Quick Search, Calendar, and Recent Cases. Below the navigation bar, there is a 'Homepage' section with a 'Retrieve Cases' link highlighted by a red box. Below this, the 'My Case Load' section is expanded, showing a table of cases. The table has columns for Select For Action, Individual Name, Individual #, Prime #, Person #, Service Category, Overdue Alerts, New Alerts, Completed Alerts, Missed Appointment, and Earliest Outstanding Alerts. The table lists 15 cases, each with a checkbox and various alert icons. To the right of the table, there is an 'Alert Legend' section with icons and descriptions for different alert types: Medical TOA Transition, Benefit Termination, Incompatible TOA, Liability Change, Change in Address/Living Situation, Medical Renewal, Pending for Service Eligibility, and Pending Case.

| Select For Action        | Individual Name      | Individual # | Prime #  | Person # | Service Category | Overdue Alerts | New Alerts | Completed Alerts | Missed Appointment | Earliest Outstanding Alerts |
|--------------------------|----------------------|--------------|----------|----------|------------------|----------------|------------|------------------|--------------------|-----------------------------|
| <input type="checkbox"/> | GREEN, SUSAN 81      | 900001234    | AB123E3L | CD8EF9K  | APD              |                |            |                  |                    | 04-25-2023                  |
| <input type="checkbox"/> | SMITH, DAIMAN 73     | 900004385    | AB123B8R | CD7EF9R  | KPS              |                |            |                  |                    | 04-25-2023                  |
| <input type="checkbox"/> | OLIVER, CARA 56      | 900003950    | AB123K9F | CD9EF3S  | APD              |                |            |                  |                    | 05-06-2023                  |
| <input type="checkbox"/> | MILLS, GWEN 73       | 900003950    | AB123K3F | CD3EF9G  | ICP              |                |            |                  |                    | 05-07-2023                  |
| <input type="checkbox"/> | HUFFMAN, KAMAL 98    | 900003950    | AB123D5G | CD8EF3F  | ICP              |                |            |                  |                    | 05-15-2023                  |
| <input type="checkbox"/> | MIDDLETON, LENIMA 97 | 900009682    | AB123K3E | CD8EF3F  | APD              |                |            |                  |                    | 05-15-2023                  |
| <input type="checkbox"/> | LEE, VERNON 73       | 900003948    | AB123L9F | CD6EF3F  | PAC              |                |            |                  |                    | 05-15-2023                  |
| <input type="checkbox"/> | RIGGS, LEANN 29      | 900003847    | AB123M9G | CD3EF9T  | NFC              |                |            |                  |                    | 05-27-2023                  |
| <input type="checkbox"/> | BOWMAN, JAY 88       | 900002855    | AB123O9M | CD2EF9F  | APD              |                |            |                  |                    | 06-04-2023                  |
| <input type="checkbox"/> | SAWYER, CHERYL 89    | 900002334    | AB123K3F | CD6EF8T  | APD              |                |            |                  |                    | 06-04-2023                  |
| <input type="checkbox"/> | THOMPSON, JOHN 78    | 900002833    | AB123E3V | CD3EF9T  | APD              |                |            |                  |                    | 06-04-2023                  |
| <input type="checkbox"/> | WAGNER, ALFRED 102   | 900001938    | AB123L9F | CD6EF3T  | APD              |                |            |                  |                    | 06-04-2023                  |
| <input type="checkbox"/> | WAGNER, DOROTHY 97   | 900008366    | AB123O9M | CD2EF8T  | BPA              |                |            |                  |                    | 06-04-2023                  |

The My Case Load section of the Homepage has several columns. The Individual Name, Individual #, Prime #, and Person # are all ways to identify an individual. The case load is normally listed alphabetically by the individual's last name upon login, unless there are alerts on the case.

If there are alerts on a case, those cases will be at the top the My Case Load section and in order of Earliest Outstanding Alert date, starting with oldest date to newest date. If there are multiple alerts on the same date, those will be alphabetized by last name. Once the alert is marked as complete, the name will go back into alphabetical order.

The Service Category column displays the service category from the SELG record.

The next four columns display alerts: Overdue Alerts, New Alerts, Completed Alerts, and Missed Appointments.

Overdue alerts show when an alert is past due. Alerts are considered overdue when they have not been marked complete within 45 days of being generated. They also change to red text when overdue.

New alerts are when an alert has been created. "New" means 44 days or newer.

Completed Alerts are ones that have been marked as complete and are still within 60 days of the alert being generated.

The Missed Appointment column is specific to alerts for the Missed Appointment. In this column you will see the Missed Appointment Icon in black. This alert can be generated for medical or any other programs.


After 61 days an alert will expire, which means it will disappear from all alert columns.

### **Alerts Follow the Oregonian, Not the Worker**

Alerts will not transfer when there is a case manager change. Alerts follow the person not the worker.

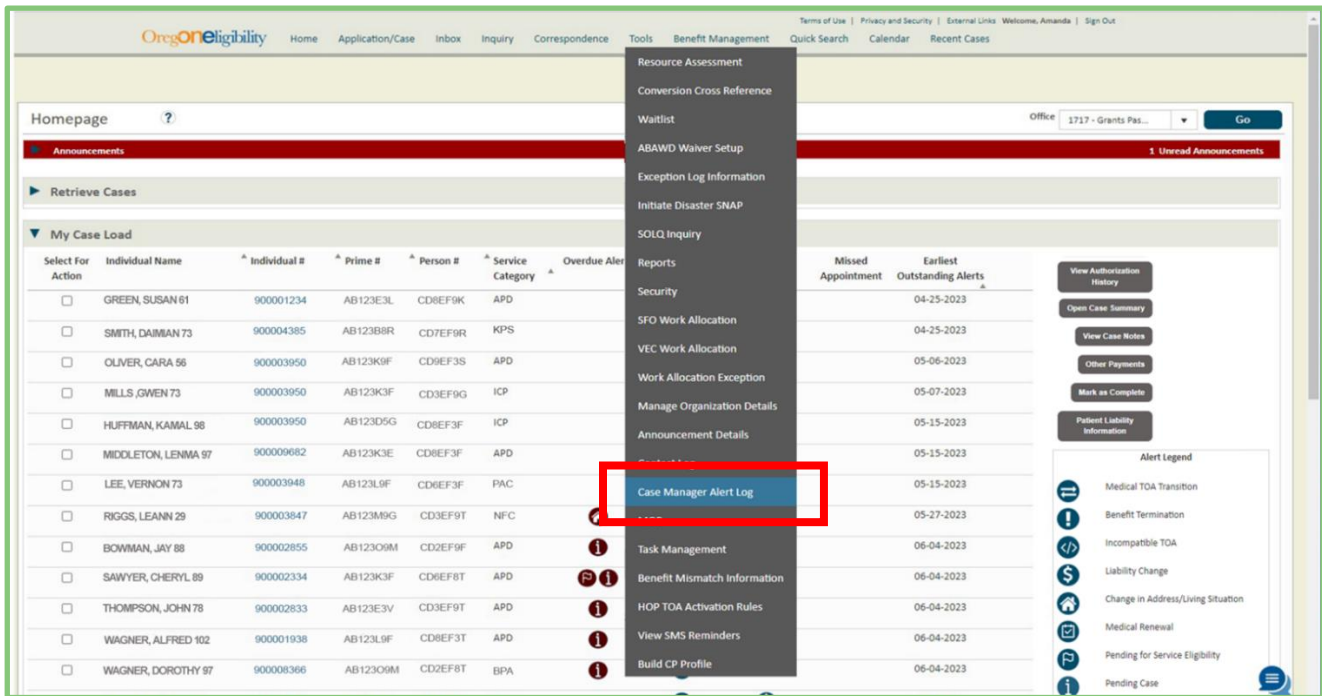
## APD Medicaid Financial Eligibility

If there is no alert icon displayed in any of the columns but there is an Earliest Outstanding Alert date, as we see for Vernon Lee in the screen capture below, then there is an alert that has been generated on the case when another case manager was assigned to the case or the case was unassigned. The case manager will need to search for this alert using the Case Manager Alert Log.

|                          |                      |           |          |         |     |   |            |
|--------------------------|----------------------|-----------|----------|---------|-----|---|------------|
| <input type="checkbox"/> | MIIDDLETON, LENMA 88 | 900009682 | AB123K3E | CD8EF3F | APD |  | 05-15-2023 |
| <input type="checkbox"/> | LEE, VERNON 95       | 900003948 | AB123L9F | CD6EF3F | APD |   | 05-15-2023 |
| <input type="checkbox"/> | RIGGS, LEANN 56      | 900003847 | AB123M9G | CD3EF9T | APD |    | 05-27-2023 |

## Case Manager Alert Log

The Case Manager Alert Log offers the most search criteria to view alerts. To access the log, select the Tools tab on the top of the ONE Homepage then select Case Manager Alert Log (outlined in a red box in the screen capture below).



The screenshot shows the OregonOneEligibility homepage. The 'Tools' tab is selected in the top navigation bar. A dropdown menu is open under 'Tools', and 'Case Manager Alert Log' is highlighted with a red box. The main content area shows a table of cases with columns for 'Select For Action', 'Individual Name', 'Individual #', 'Prime #', 'Person #', 'Service Category', and 'Overdue Alert'. The 'Overdue Alert' column shows 'Earliest Outstanding Alerts' with dates. A sidebar on the right contains buttons for 'View Authorization History', 'Open Case Summary', 'View Case Notes', 'Other Payments', 'Mark as Complete', and 'Patient Liability Information'. An 'Alert Legend' is also visible at the bottom right.

Tools tab allows you to search by specific criteria including:

- Case Manager Office
- Case Office
- Case Manager Name

A search from this screen must include at least one of the following fields:

- Case Manager Office
- Case Manager Name
- Person #
- Individual #

The screenshot shows the 'Case Manager Alert Log' search interface. At the top is a navigation bar with links: Home, Application/Case, Inbox, Inquiry, Correspondence, Tools, Benefit Management, Quick Search, Calendar, and Recent Cases. The main title is 'Case Manager Alert Log'. Below it is a 'Search Criteria' section with several input fields and checkboxes. On the left, there are dropdowns for 'Case Manager Office', 'Case Office', and 'Person #'. On the right, there are dropdowns for 'Case Manager Name' and 'Individual #', and a 'Lookup' button. Below these are two scrollable lists of checkboxes for 'Alerts' (Medical TOA Transition, Benefit Termination) and 'Services' (Other (Non I/DD or BH), I/DD). There is also a checkbox for 'Alert Status' (New, Overdue). At the bottom, there are date pickers for 'Generated From' and 'Generated To', and 'Reset' and 'Search' buttons. The 'Search Results' section at the bottom shows 'No Results Found'.

Using the Case Manager Alert Log from the Tools tab allows workers to search by any Case Manager Name and for alerts that did not have an assigned case manager when the alert was generated.

Search results can be refined to include only certain Alerts, Alert Status or Services by selecting preferences using the checkboxes.

The Reset button can be used to reset all the search criteria to the default values, if a change to the search criteria is needed.

After selecting all search criteria, press the Search button to see the results.

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In the example in the screen capture below, the search criteria will include the Liability Change alert using the Case Manager Name of Unassigned and Services of Other (Non I/DD or BH). This will show APD individuals with a Liability Change that do not have an assigned case manager in ONE.

Case Manager Alert Log

Search Criteria

Case Manager Office

Case Office

Person #

Alerts

Services

☐ Benefit Termination

☐ Incompatible TOA

☒ Liability Change

☐ Select All

☒ Other (Non I/DD or BH)

☐ I/DD

☐ Also show individuals who are requesting services or have an active SELG record (including those closed within the past 6 months)

Outstanding Alerts

Generated From

Generated To

Case Manager Name

Unassigned

Individual #

Prime #

Alert Status

☐ Select All

☐ New

☐ Overdue

Lookup

Reset

Search

Local Offices could use a search like this to review cases that had an alert before a case manager was assigned to the individual using the ONE CM checkbox in Oregon ACCESS.

The search results could be used to identify cases for which the 512 needs to be touched or to check MMIS to make sure the liability was updated as expected.

## Retrieve Cases

Another way to search for alerts is by using the Retrieve Cases section of the Case Manager Homepage (outlined in a red box in the screen capture below). This section will only display alerts for the case manager that is logged into ONE. It can be used to focus on alerts that are higher priority and filter their caseload.



# APD Medicaid Financial Eligibility

The screenshot shows the OregonEligibility homepage. The top navigation bar includes links for Home, Application/Case, Inbox, Inquiry, Correspondence, Tools, Benefit Management, Quick Search, Calendar, and Recent Cases. Below the navigation bar, there's a 'Homepage' section with a search bar and a 'Go' button. A red banner at the top indicates '0 Unread Announcements'. The 'Retrieve Cases' section is highlighted with a red box. It contains several search filters: Prime #, Individual #, Person #, Services (Select All, Other (Non I/DD or BH), I/DD), Alerts (Select All, Medical TOA Transition, Benefit Termination), Alert Status (Select All, New, Overdue), and a checkbox for 'Also show individuals who are requesting services or have an active SELG record (including those closed within the past 6 months)'. There are also 'Generated From' and 'Generated To' date pickers, and 'Reset' and 'Search' buttons.

## Tooltips

Case managers can get a quick look at why an alert has been generated by hovering over the alert icon. A tooltip will be displayed. The tooltip displays more information about the alert.

An example is shown in the screen capture below. In this example, the case manager hovered over the Missed Appointment icon, the tooltip displayed was Missed Appointment – 1 Program 12345609 Medical, 07/11/2023 : 4:30 PM.

The screenshot shows a tooltip displayed over a 'Missed Appointment' icon. The tooltip text reads: 'Missed Appointment - 1 Program, 12345609 Medical, 07/11/2023 : 04:30 PM'. Below the tooltip, there are navigation links: '< Prev 1 Next >'. To the right of the tooltip, there are two buttons: 'View Authorization History' and 'View Case Notes'. The background shows a table with columns for 'Missed Appointment' and 'Earliest Outstanding Alerts', with a date '06-15-2023' visible.

In this example, the case manager hovered over the Missed Appointment icon, the tooltip displayed was Missed Appointment – 1 Program 12345609 Medical, 07/11/2023 : 4:30 PM.

Tooltips usually include the effective date of the change that created the case alert. This date is helpful when reviewing the case for more details about the alert.

But be aware, these tooltips aren't updated after the alert is generated. They are showing the status only on the date the alert was generated, and the case may have had a change since then. You need to look at the case to see current information and benefits.

The table below shows the alert details that will be shown when hovering over an alert.

| Alert Name                                | Alert Details  |
|---|--|
| <b>Medical TOA Transition</b>             | <Previous TOA> to <New TOA>, <Effective Date>  |
| <b>Benefit Denial/Termination</b>         | <TOA Code>, <Termination date of closing TOAs>, <Case Mode/Status>, <Effective Date><br><br>For denials: 'Termination date of closing TOAs' field will be printed as "N/A" |
| <b>Incompatible TOA</b>                   | <Mismatched TOA1>/<Mismatched TOA2>, <Effective Date>  |
| <b>Liability Change</b>                   | <Previous Amount> to <New Amount>, <Effective Date>  |
| <b>Change in Address/Living Situation</b> | <Effective Date>, <Old Address/L.A.> to <New Address/L.A.>   |
| <b>Medical Renewal</b>                    | <Current Renewal status>, <Renewal due date>   |
| <b>Pending for Service Eligibility</b>    | <Current Service TOA Pending SELG>, due <Date SELG record is due>  |

| Alert Name                   | Alert Details   |
|------------------------------|---|
| Pending Case                 | <RFI Details, due <F=RFI due date> or Agency Pend or Non-Financial pend.  |
| Missed Appointment           | <Appointment Details>, <Case/Program>, <Appointment Date>   |
| Disqualifying Asset Transfer | <current Service TOA with disqualifying transfer penalty> - <disqualifying transfer penalty begin date> - disqualifying penalty end date> |

## Reviewing Information on Homepage or Case Manager Alert Log

Case managers need to review screens within ONE to view the current information on the case, before taking action on an alert. See the [Case Manager Steps to Take Before Marking Alerts as Complete](#) document for more information on suggested steps.

This can be done by selecting the case in the select for action column and then selecting a button. See the screen capture below. These buttons will be grey until you check the Select for Action checkbox next to an individual’s name, then they will turn blue and can be selected.

Search Results

| Select For Action                   | Individual Name   | Individual # | Prime #  | Person # | Service Category | Overdue Alerts | New Alerts | Completed Alerts | Missed Appointment | Earliest Outstanding Alerts |
|-------------------------------------|-------------------|--------------|----------|----------|------------------|----------------|------------|------------------|--------------------|-----------------------------|
| <input checked="" type="checkbox"/> | BABCOCK, DARCI 94 | 800012345    | AB123J9L | B123J9L  | APD              |                |            |                  |                    | 01-13-2024                  |
| <input type="checkbox"/>            | WADE, EVALINE 91  | 800023456    | CDE2345A | DE2345A  | KPS              |                |            |                  |                    | 01-13-2024                  |
| <input type="checkbox"/>            | HINTON, CARL 90   | 800054321    | EFG123AB | FG123AB  | APD              |                |            |                  |                    | 01-22-2024                  |
| <input type="checkbox"/>            | KAY, KIMBERLY 86  | 800065432    | HIJ1234A | IJ1234A  | APD              |                |            |                  |                    | 01-22-2024                  |
| <input type="checkbox"/>            | CHASE, MIQUEL 90  | 800098765    | KLM1234A | LM1234A  | APD              |                |            |                  |                    | 01-30-2024                  |
| <input type="checkbox"/>            | WANG, ANNIE 76    | 800013579    | ACD123NH | CD123NH  | APD              |                |            |                  |                    | 01-30-2024                  |

View Authorization History

Open Case Summary

View Case Notes

Other Payments

Mark as Complete

Patient Liability Information

Some buttons open a new screen, and you lose your search results. Other buttons open a window over your caseload or search screen, and after reviewing the information you can return to the list of individuals you were viewing.

The View Authorization History, View Case Notes, and Patient Liability Information buttons open in a new window. You can use these screens and then close them and return to your dashboard or search results.

The Open Case Summary and Other Payments buttons open to that screen in the case, in the current browser tab. Any search results will be lost, and the search will need to be repeated when the review is finished.

Below you will find more information about each of the buttons.

**View Authorization History Button**

The View Authorization History button will open the Authorization History screen (see the screen capture below). You can search and view the authorization history information for the individual you selected to review the benefits that have been authorized along with the Notice Reasons, RFIs, Financial Summary, Liability Summary, and disqualifications. When you close the window, you will be returned to the Case Manager Alert Log or your Dashboard, depending on where you started.

Authorization History

Search Criteria

Begin Date

<mm/dd/yyyy>

15

End Date

<mm/dd/yyyy>

15

Individual

Program

Authorization Status

Search

**Open Case Summary Button**

The Open Case Summary button will open the Case Summary screen (see below) in ONE. It will not be a window over the Dashboard or Case Manager Alert Tool.

# APD Medicaid Financial Eligibility

Oregoneligibility

[Home](#)[Application/Case](#)[Inbox](#)[Inquiry](#)[Correspondence](#)[Tools](#)[Benefit Management](#)[Quick Search](#)[Calendar](#)[Recent Cases](#)

Case Summary

Expand All

Returned Mail Received – Initiate Outreach

Submit

Case: 400012345

Case ModeActive

MedicalApproved (Active)

SNAPDiscontinued (Inactive)

Upcoming Renewal08/31/2024

Case Summary Information

| Case#     | Case Name        | Case Mode | Case Status | Office Name                  | Office County | Branch Code |
|-----------|------------------|-----------|-------------|------------------------------|---------------|-------------|
| 400012345 | WADE, EVALINE 91 | Active    | Approved    | 0111 - Baker City DHS Office | BAKER         | 0111        |

Outstanding Tasks

Select All

| Task ID                           | Status | Action | Task Name | Queue Type | Assigned To | Due Date | On Hold Reason | On Hold Comments | Applicant Portal Changes |
|-----------------------------------|--------|--------|-----------|------------|-------------|----------|----------------|------------------|--------------------------|
| No records found to be displayed. |        |        |           |            |             |          |                |                  |                          |

Assign to Me

Upcoming Appointments

Assigned Worker Information

| Individual Name  | Person # | User Type    | Worker Name  | Worker ORN | Office Name                  | ODDS Case |
|------------------|----------|--------------|--------------|------------|------------------------------|-----------|
| WADE, EVALINE 91 | DE2345A  | Case Manager | JANE ROWLING | OR0123456  | 0111 - Baker City DHS Office | No        |

View Assigned Worker History

View Case Notes

Document Upload

Proceed To Verification

Continue Previously Selected Action

Perform Intake

Report a Change

Renew/Periodic Report

Non Eligibility Update

View

Add or Reopen Program

Processing Timeframe Extension

## View Case Notes Button

The View Case Notes button will open a window (see below) on top of the search results. It will allow you to search and view the case notes. This is a quick way to see the latest actions that have been taken on a case.

When you close the window, you will be returned to the Case Manager Alert Log or your Dashboard, depending on where you started.

APD Medicaid Financial Eligibility

Case Notes Summary

Case Notes Search

Date Range From

<mm/dd/yyyy>

15

To

<mm/dd/yyyy>

15

Updated By

Lookup

Case Mode

Category

☒ Include System Generated Case Notes

Add Note

Reset

Search

Download/Print All

Download/Print Selected

Search Results

Expand All/ Collapse All

☐ Select All

Updated Date Time

Updated By

Category

Duplicate ?

Secured ?

Originally Created By

Originally Created Date

☐ ▼

12/29/2023 21:16 PM

General

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--

12/29/2023 21:16 PM

Case successfully authorized for MSERV (AP) (12/1/2023 12:00:00 AM-12/31/2023 12:00:00 AM), LTCSERV (AP) (1/1/2024 12:00:00 AM-1/31/2024 12:00:00 AM), LTCSERV (AP) (2/1/2024 12:00:00 AM-), ADLT (TN) (1/1/2024 12:00:00 AM-), MSERV (TN) (1/1/2024 12:00:00 AM-) Authorized by: IN025 - Run eligibility when SELG record is received, IN035 - Reevaluate Medical benefits after AVS response is received

Other Payments Button

The Other Payments button will open the Other Payments Summary in ONE (see below). Here you can review or process medical related payments for the individual. To learn more about medical related payment refer to the [Program Payments and Supports QRG](#).

Other Payments Summary

< Previous

Save

Next >

Medical Related Payments Request

☐ View Inactive Records

For actual payment details information, please see the Benefit Details screen.

| Individual Name                   | Payment Type | Amount | Recurring | Request Status | Authorized? | Start Date | Requested End Date | Actual End Date | Actions |
|-----------------------------------|--------------|--------|-----------|----------------|-------------|------------|--------------------|-----------------|---------|
| No records found to be displayed. |              |        |           |                |             |            |                    |                 |         |

+ New Medical Related Payment Request

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Mark as Complete Button

The Mark as Complete button immediately moves the alert to the Completed Alerts column, there is no confirmation required for this action. So, don't select that button until all recommended actions have been completed. As shown in the screen capture below, multiple search results can be selected to Mark as Complete at one time.

Search Results

| Select For Action                   | Individual Name   | * Individual # | * Phone # | * Person # | * Service Category | Overdue Alerts | New Alerts | Completed Alerts | Missed Appointment | Earliest Outstanding Alerts |
|-------------------------------------|-------------------|----------------|-----------|------------|--------------------|----------------|------------|------------------|--------------------|-----------------------------|
| <input checked="" type="checkbox"/> | BARCOCK, DARCE 94 | 800012345      | AB123456  | BB234567   | APD                |                |            |                  |                    | 01-13-2024                  |
| <input type="checkbox"/>            | WADE, EVALINE 92  | 800023456      | CD62345A  | DE2345A    | KPS                |                |            |                  |                    | 01-13-2024                  |
| <input checked="" type="checkbox"/> | HINTON, CARL 90   | 800054321      | EF6234AB  | FG234AB    | APD                |                |            |                  |                    | 01-22-2024                  |
| <input checked="" type="checkbox"/> | KAY, KIMBERLY 86  | 800065432      | HI1234A   | IJ1234A    | APD                |                |            |                  |                    | 01-22-2024                  |
| <input type="checkbox"/>            | CHASE, MIGUEL 90  | 80008765       | KLM1234A  | LM1234A    | APD                |                |            |                  |                    | 01-30-2024                  |
| <input type="checkbox"/>            | WANG, ANNIE 76    | 800012378      | ACD234NH  | CD123NH    | APD                |                |            |                  |                    | 01-30-2024                  |

View Authorization History

Open Case Summary

View Case Notes

Close Payments

Mark as Complete

Patient Liability Information

Patient Liability Information Button

The Patient Liability Summary button opens a window over the search results. This is a quick way to review liability information on the case.

Patient Liability Summary

EVALINE WADE EDG# 1234567

| View                  | Patient Liability Begin Date | Patient Liability End Date | Patient Liability - Client Obligation | SELG Begin Date | SELG End Date | Service Category                    |
|-----------------------|------------------------------|----------------------------|---------------------------------------|-----------------|---------------|-------------------------------------|
| <input type="radio"/> | 12/01/2023                   | 12/31/2023                 | \$ 836.50                             | 10/02/2023      | 09/30/2024    | Aged and Physically Disabled (CAPS) |
| <input type="radio"/> | 01/01/2024                   | 09/30/2024                 | \$ 848.10                             | 10/02/2023      | 09/30/2024    | Aged and Physically Disabled (CAPS) |

Income

Earned Income Details

| Individual                       | Income Type | Amount | Excluded Amount | Countable Amount |
|----------------------------------|-------------|--------|-----------------|------------------|
| No records found to be displayed |             |        |                 |                  |

Individual # Hyperlink

There is also an Individual # hyperlink on both the Case Alert Log and the case manager Dashboard. This is a helpful way to open a new tab in your browser and navigate to the Case Summary.

When you select the hyperlink, see red box in the screen capture below, the Individual Summary opens in a new tab

| Search Results                      |                    |              |          |          |                  |                |            |                  |                    |                             |   |  |
|-------------------------------------|--------------------|--------------|----------|----------|------------------|----------------|------------|------------------|--------------------|-----------------------------|---|--|
| Select For Action                   | Individual Name    | Individual # | Prime #  | Person # | Service Category | Overdue Alerts | New Alerts | Completed Alerts | Missed Appointment | Earliest Outstanding Alerts |   |  |
| <input checked="" type="checkbox"/> | BABCOCK, DARCIÉ 94 | 800012345    | AB123J9L | B123J9L  | APD              |                |            |                  |                    | 01-13-2024                  | <a href="#">View Authorization History</a>    |  |
| <input type="checkbox"/>            | WADE, EVALINE 91   | 800023456    | CDE2345A | DE2345A  | KPS              |                |            |                  |                    | 01-13-2024                  | <a href="#">Open Case Summary</a>             |  |
| <input type="checkbox"/>            | HINTON, CARL 90    | 800054321    | EFG123AB | FG123AB  | APD              |                |            |                  |                    | 01-22-2024                  | <a href="#">View Case Notes</a>               |  |
| <input type="checkbox"/>            | KAY, KIMBERLY 86   | 800065432    | HIJ1234A | IJ1234A  | APD              |                |            |                  |                    | 01-22-2024                  | <a href="#">Other Payments</a>                |  |
| <input type="checkbox"/>            | CHASE, MIQUEL 90   | 800098765    | KLM1234A | LM1234A  | APD              |                |            |                  |                    | 01-30-2024                  | <a href="#">Mark as Complete</a>              |  |
| <input type="checkbox"/>            | WANG, ANNIE 76     | 800013579    | ACD123NH | CD123NH  | APD              |                |            |                  |                    | 01-30-2024                  | <a href="#">Patient Liability Information</a> |  |

The search results are still available in the original tab.

Once the Individual Summary is open you can select the hyperlink for the Case #, see red box in the screen capture below.

OregoneEligibility

HomeApplication/CaseInboxInquiryCorrespondenceToolsBenefit ManagementQuick SearchCalendarRecent Cases

Individual Summary

Individual Information

|  |           |  |                |
|--|-----------|--|----------------|
| Individual #   | 800023456 | Case #   | 400012345      |
| ONE Online Account   | None      |  |                |
| First/Given Name(s)  | EVALINE   | MI   | S              |
| Last/Family Name(s)  | WADE      | Suffix   |                |
| First Name(s) individual would like us to use  | EVALINE   | Middle Initial individual would like us to use |                |
| Last Name(s) individual would like us to use   | WADE      | Suffix individual would like us to use         |                |
| Person #   | DE2345A   | DOB  | 10/31/1933     |
| Prime #  | CDE2345A  | Date of Death                                  |                |
| We recognize and respect everyone's gender identity. We use federal data to verify your gender information. <a href="#">Gender Information Summary</a> |           | Gender Identity                                | Did not Answer |

PMOYT Determination

View Disqualification

Manage TANF Time Clock

Manage ABAWD Months

Program Compliance

View Service Eligibility

Manage IPV (eDRS)

Document Upload

EXT Medical

Link To Applicant Portal

After you select the Case #, the Case Summary screen will be displayed, just as if you had completed a quick search for the case.



# APD Medicaid Financial Eligibility

Oregoneeligibility

[Home](#)[Application/Case](#)[Inbox](#)[Inquiry](#)[Correspondence](#)[Tools](#)[Benefit Management](#)[Quick Search](#)[Calendar](#)[Recent Cases](#)

Case Summary

Expand All

Returned Mail Received – Initiate Outreach

Submit

Case: 400012345

Case ModeActive

MedicalApproved (Active)

SNAPDiscontinued (Inactive)

Upcoming Renewal08/31/2024

Case Summary Information

| Case#     | Case Name        | Case Mode | Case Status | Office Name                  | Office County | Branch Code |
|-----------|------------------|-----------|-------------|------------------------------|---------------|-------------|
| 400012345 | WADE, EVALINE 91 | Active    | Approved    | 0111 - Baker City DHS Office | BAKER         | 0111        |

Outstanding Tasks

Select All

| Task ID                           | Status | Action | Task Name | Queue Type | Assigned To | Due Date | On Hold Reason | On Hold Comments | Applicant Portal Changes |
|-----------------------------------|--------|--------|-----------|------------|-------------|----------|----------------|------------------|--------------------------|
| No records found to be displayed. |        |        |           |            |             |          |                |                  |                          |

Assign to Me

Upcoming Appointments

Assigned Worker Information

| Individual Name  | Person # | User Type    | Worker Name  | Worker ORN | Office Name                  | ODDS Case |
|------------------|----------|--------------|--------------|------------|------------------------------|-----------|
| WADE, EVALINE 91 | DE2345A  | Case Manager | JANE ROWLING | OR0123456  | 0111 - Baker City DHS Office | No        |

View Assigned Worker History

## ONE Updates

The updates listed below are described in the document above but listed here as well as a convenience to experienced workers.

### March 2024 Updates

- Names, on both the Case Manager Homepage and in the Case Manager Alert Log, will be displayed as Last Name, First Name Age.
- The individual number hyperlink will open the Individual Summary screen in a new tab. In earlier versions the window opened in a screen over the search results.
- There is a new button labeled Patient Liability Information. When the individual checkbox is checked and this button is selected, a window will open over the search results displaying the Liability Summary screen.

### July 2024 Updates

- A new condition for the Benefit Termination alert on the Case Manager Dashboard was added to ONE. The Benefit Termination alert for the Case Manager’s dashboard will now generate at authorization when the

primary Medical Type of Assistance and/or services Type of Assistance is terminated or transitions to BHP or PME for the Individual who has an active SELG record and the SELG end date is later than or equal to the Eligibility Run date or is pending for a SELG record. The Case Alerts Descriptions document has been updated to describe this change

### December 2024 Updates

- The Benefit Termination alert is now the Benefit Denial/Termination alert. The CM Alert Description document has been updated to note that this alert is now generated for a denial, in addition to a termination.

### August 2025 Updates

- The Benefit Denial/Termination alert now include the TOA Code in the tooltip.

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You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the APD Training at [APD.Training@odhsoha.oregon.gov](mailto:APD.Training@odhsoha.oregon.gov) or 503-428-1345. We accept all relay calls.



**Aging and People with Disabilities**

Medicaid Financial Eligibility

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