Aging and People with Disabilities
Medicaid Services and Supports

OREGON DEPARTMENT OF
Human Services

Transmittal Summaries for Intake Module Updates

Updated: Oct. 8, 2025

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Screen shots have not been included in the summaries below. Staff may select each transmittal to view the screen shots for each update.

[APD-IM-25-102](#) Issue date Oct. 8, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday Oct. 9, 2025. Please avoid using the Intake Module on this day between 5:30 p.m. – 6:00 p.m.
  - **Note:** Before logging into the Intake Module following the release, staff are encouraged to clear the cache for their internet browser, by opening their browser and typing Ctrl + F5 to ensure they are accessing the updated Intake Module.
- **Update includes the following:**
  - A bug that was preventing staff from editing Intakes after being 'Reopened' has been resolved. Staff should once again be able to edit Intakes after being reopened.
  - A bug that was giving users an error message about an Invalid email for the applicant was preventing staff from saving an Intake record before attaching a worker to the assessment appointment has been resolved.
  - A bug that was causing an applicant's date of birth to clear upon filling out specific fields in the Intake module has been resolved.
  - Users will now receive the following warning message in the Intake Module when their Oregon ACCESS (OA) password is expired. Users must update their password in OA before they may log into the Intake Module.

    Password Expired: Your password is expired. Please reset your OREGON ACCESS password to unlock your account.
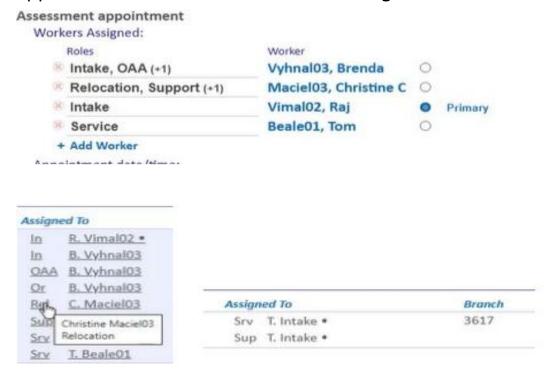
APD-IM-25-093 Issue date Sep. 16, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday Sep. 18, 2025. Please avoid using the Intake Module on this day between 5:30 p.m. – 6:00 p.m.
  - **Note:** Before logging into the Intake Module following the release, staff are encouraged to clear the cache for their internet browser, by opening their browser and typing Ctrl + F5 to ensure they are accessing the updated Intake Module.

- **Update includes the following:**
  - When the 'Lives with Applicant' box is checked, the address for an individual listed as a contact will be read-only. If staff need to change the contact address, they must either uncheck the 'Lives with Applicant' checkbox or update the address for the applicant.
  - To support staff with color vison deficiencies, we have added an underline to the fields that have been modified, making changes easier to identify.

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ttempt #1: 09/11/2025 02:12 PM

  - Staff will now be able to assign multiple workers and roles in the Workers Assigned section. Staff will be able to see all workers and the associated roles on the 'Your Intakes' Aging and People with Disabilities Number: APD-IM-25-093 All ODHS employees Aging and People with Disabilities Area Agencies on Aging: Type A and B Child Welfare Division Children's Intensive In Home Services Children's Residential Services County DD Program Managers Developmental

Disabilities Services Self-Sufficiency Programs Support Service Brokerage Directors Stabilization and Crisis Unit Other (please specify): ADRC list and on the 'Branch Intakes' list. To view the full name of the role, staff can hover over the role abbreviation to view the entire role name. The worker listed as the 'Primary' worker will be indicated with an * next to their name. The applicant's name will appear on the 'Your Intake' list for all assigned workers.

APD-IM-25-089 Issue date Aug. 28, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday Aug. 28, 2025. Please avoid using the Intake Module on this day between 5:30 p.m. – 6:00 p.m. Upon logging into the Intake Module following the release, staff are encouraged to clear the cache for their

internet browser, by opening their browser and typing Ctrl + F5 to ensure they are accessing the updated Intake Module.

- **Update includes the following:**
  - o LTSS assessment completed' is being added to the list of items that may be selected on the 'Call outcome' drop-down list.
  - o When a user selects 'Complete Intake' a confirmation message will appear to confirm they want to mark the Intake as complete. The user must select 'OK' or 'Cancel'. If 'OK' is selected, the Intake will be marked as complete. If 'Cancel' is selected, the Intake will remain in the same status.
  - o The 'Complete Intake' button is being moved to the far righthand corner to help staff avoid accidentally marking an Intake as complete.
  - o Closed Intakes will begin falling off the 'Your Intakes' and the 'Branch Intakes' list after being in closed status for 90 days (on the 91st day).
  - o Users will receive an informational message letting them know they must answer the new Veteran question before they may make changes to the assessment date/time on an Intake.

APD-IM-25-081 Issue date Aug. 6, 2025

- **Message:** Release on Thursday August 7, 2025. Upon logging into the Intake Module following the release, staff are encouraged to clear the cache for their internet browser, by opening their browser and typing Ctrl + F5 to ensure they are accessing the updated Intake Module.
- **Update includes the following:**

- o A new question and response selection is being added in the Applicant Information section, related to the applicant's military status. Staff will be required to address the question/response before they may enter an assessment date and time.
- o Staff will now be able to assign multiple workers and multiple roles for each worker listed associated with an Intake.
- o Users will start receiving a warning message to update their Oregon ACCESS password in the Intake Module five days before the password is set to expire.

APD-IM-25-075 Issue date July 18, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday July 17, 2025, at 11:00 p.m.
- **Update includes the following:**
    - o When a worker is removed, staff will be able to select 'Email worker' to notify the worker who has been remove from the Intake.
    - o A new selection of 'ADRC' is being added to the 'Role' list next to the 'Staff taking call indicator.
    - o When a field is required to be completed before the Intake can be saved, the user will see those fields highlighted in pink.

APD-IM-25-067 Issue date June 27, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday June 26, 2025, at 11:00 p.m.
- **Update includes the following:**

- o The Intake status is being removed from the 'Your Intakes' and the 'Branch Intakes' columns since the Intake status is included in each section header.
- o Users will be able to transfer Intakes out of their branch by changing the assigned branch number in the Intake Module.
- o Users will be able to select the 'Request Transfer' button next to the Branch indicator which will trigger an email to send to the branch the Intake is currently assigned to.
  - ▪ Users can utilize the Branch Transfer Email List to find the email address for the branch the Intake is being requested from.
- o When a user is attempting to save an Intake and there are required fields which must be completed before the Intake can be saved, the required fields will be marked with a yellow highlighted red exclamation point, so users are able to identify the fields more quickly.
- o Intakes in 'Closed' status will no longer be editable. If a user needs a Closed intake to be updated or reopened, they will need to contact the service desk for assistance.
- o A new checkbox titled 'Caller is Applicant' is being added above the name in the Applicant section. Checking this box will auto populate the Applicant information into the Caller Information section and will auto select 'Self' from the Relationship selection list.

APD-IM-25-058 Issue date June 5, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday June 5, 2025, at 11:00 p.m.

- **Update includes the following:**
  - When a user selects 'Withdrawn' from the 'Call outcome' list, another list will appear requiring the user to select from the withdrawal reason list. Users will be able to select multiple reasons from the list. The withdrawal reason list will include the following:
    - Estate Administration Unit (EAU)
    - Not interested in services at this time
    - Did not intend to apply
    - Not financially eligible
    - Not willing to provide required verification
    - Not willing to participate in assessment
    - Changed their mind
    - Other
      - When 'Other' is selected the user must indicate in the free text box the reason which is not available on the list. The reason must be no less than 10 characters.
  - A text box titled 'ONE case number' has been added next to the individual's Prime number at the top of the Intake screen. This is a free text box for staff to enter the individual's case number from ONE but will not be directly linked to the ONE case.

APD-IM-25-052 Issue date May 15, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday May 15, 2025, at 11:00 p.m.
- **Update includes the following:**

- o Adding the option of 'Scheduled' from the drop-down selection list for the 'Financial eligibility status' indicator.
- o Adding a new column on the 'Your Intakes' and the 'Branch Intakes' lists on the Intake homepage listing the date for the date 'Contact Made'.
- o Adding a new 'Branch Management Report' on the Intake homepage for local office management to access. When selected, the report will be exported to Excel allowing managers to filter the information to meet their needs. The report includes the following data elements:
  - Applicant name
  - Applicant prime number
  - Date of request (DOR)
  - Date contact made
  - Oregon ACCESS (OA) date of assessment
  - Service Priority Level (SPL) results
  - 45th day
  - District number
  - Branch number (with the ability for managers to select multiple branches which they have access to in OA)
  - Intake worker assigned
  - Total number of intakes
  - Role of person who submitted the intake request

APD-IM-25-041 Issue date April 17, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday April 17, 2025, at 11:00 p.m.
- **Update includes the following:**
  - An edit will be added to prevent staff from attaching an Inactive person to an Intake. This will help reduce the number of accidental duplicate Intake records.
  - Staff will be able to re-open an Intake within 45-days from the 'Date of Request' (DOR) or within 60-days of the 'Date Contact Made' if there is no DOR.
    - Staff will need to open the Intake and select the 'Reopen' button (see Figure 1) at the top left corner of the Intake Detail screen, scroll down to edit the 'Call Outcome' section with the new appropriate Intake Call Outcome selection and select 'Save'.
      - For example, uncheck the 'Request withdrawn' box and check the 'Intake requested' box.
    - That action will put the Intake back into Active status. Once the Worker is assigned the status will change to 'Assigned'. Once the Appointment Date/Time are entered, the status will change to 'Scheduled'.
  - Branches that are inactive and cannot be logged into in Oregon ACCESS (OA) will be removed from the Intake branch list.
  - The 'Your Intakes' list will be updated to remove the filter on branch and will now list all Intakes assigned to a worker regardless of which branch they are logged into in the Intake Module.

- A financial information disclosure statement is being added in the Financial Information section which will read, 'Staff should not ask for financial information during an Intake but if financial information is shared, it should be captured in the Financial Information section. Staff must add a case note to ONE with the financial information shared.'
- **Additional Intake Module Tips:**
  - Following the Intake update released on April 11, 2025:
    - Tier 1 users can create an assessment with an active Benefit in OA within the last 30-days or an Intake record with a DOR within the last 90-days.
    - Tier 2 users can create an assessment with an active Benefit in OA within the last 60-days or an Intake record with a DOR within the last 120-days.
      - If neither applies for Tier 1 or Tier 2 users, then a new Intake must be created for that individual.
  - Staff will need to create an assessment before moving into remote within OA. Staff are not able to create an assessment while in remote.

APD-IM-25-038 Issue date April 15, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday April 11, 2025, at 11:00 p.m.
- **Update includes the following:**
  - All Screenings in OA will be changed from Active status to Inactive status.

- Staff must create an Intake record for Screenings that are still being worked on.
    - Staff will be able to put Screenings back into Active status, but the Screening will be read-only and will not be editable.
  - All Screenings change to Active status will be changed back to Inactive status during a nightly batch process.

APD-IM-25-030 Issue date Mar. 20, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday Mar. 20, 2025, at 11:00 p.m.
- **Update includes the following:**
  - The ability to filter the information on the Intake lists.
    - The following column headers will have filters allowing staff to click on the column header to change the information from ascending to descending order and vice versa.
      - DOR
      - 45th Day
      - Assessment Scheduled
  - The ability to filter by date range for a specific period for the following topics by clicking on the 'Filter by date range' icon indicated as number one on the screen shot below:
    - DOR
    - 45th Day
    - Assessment Scheduled
  - The ability to export the filtered report to Excel by clicking on the 'Export to Excel' icon.

- o The ability to filter by specific information (i.e., name or prime number) by typing that information I the 'Filter' text box.

APD-IM-25-026 Issue date Mar. 6, 2025

- **Message:** Aging and People with Disabilities (APD) has made some additional edits to the Intake Module which are being updated in a release on Thursday Mar. 6, 2025, at 11:00 p.m.
- **Update includes the following:**
  - o Branch name in the Intake header is being updated to indicate the correct branch name the user is logged into.
  - o The Intake Caseload Report is being updated to identify the worker assigned to the Intake.
  - o The selection option of 'GA Referral' is being added to the Call Outcome and Reason for Call drop-down lists.
  - o Tier 1 and Tier 2 staff will now be able to change an Inactive 'Screening' and 'Case' in Oregon ACCESS back to Active status.

APD-PT-25-004 Issue date Feb. 20, 2025

- **Discussion/interpretation:** Effective Feb. 24, 2025, all Aging and People with Disabilities (APD) and Area Agency on Aging (AAA) service case managers (CMs), supervisors, and any staff involved with intakes for service requests will be required to begin using the new Intake Module. The Intake Module will replace the Screening tool in Oregon ACCESS (OA). No new DHS 0079 (01.19) Screenings should be created in OA after the Feb. 24th go-live date for the Intake Module.

  Staff must complete all current Screenings in OA by April 11, 2025. After this date, Screenings will be marked as Inactive and will no longer be

editable. If a Screening cannot be completed by this deadline, staff will need to create a new Intake in the Intake Module, ensuring that the same information from the Screening is included.

Note: APD is making ongoing updates to the Intake Module to enhance the user experience, while the functionality will remain unchanged. For example, we have removed the 'Call Taken By' column from the Intake Module home screen and replaced it with a new column titled 'Assessment Scheduled' to display information that is more useful to staff.

- **Training/communication plan:**
  - o Review the Intake Module Webinar recording in Workday.

APD-IM-25-022 Issue date Feb. 27, 2025

- **Message:** Aging and People with Disabilities (APD) has identified a few items that need to be addressed in the Intake Module (released on Monday Feb. 24, 2025) which are being updated in a release on Thursday Feb. 27, 2025, at 11:00 p.m.
- **Update includes the following:**
  - o Users will be prompted to save narratives when leaving the narrative window without saving.
  - o Add a call outcome option of 'Duplicate' for staff to select when a duplicate Intake is accidentally created. This will change the duplicate intake status to Closed.
  - o Intake showing in Oregon ACCESS (OA) under the worker who took the call and not the assigned worker is being updated to correctly show on the Intake list in OA for the assigned worker.

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Aging and People with Disabilities at apd.ltss@odhs.oregon.gov or **503-945-5600**. We accept all relay calls.

OREGON DEPARTMENT OF
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