

Information Memorandum Transmittal Aging and People with Disabilities



Mat Rapoza

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Number: APD-IM-23-040

Issue date: 4/20/2023

Topic: Long Term Care

Due date:

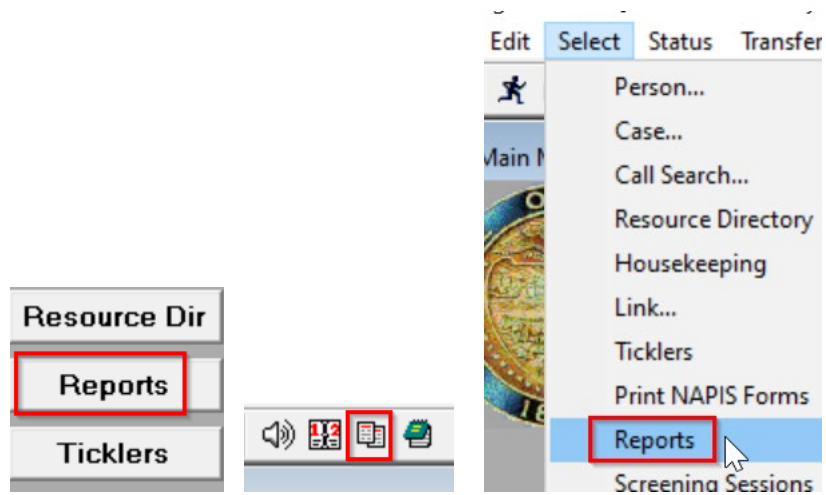
Subject: CA/PS 2 Assessment Due Report Update in Oregon ACCESS (OA)

Applies to (check all that apply):

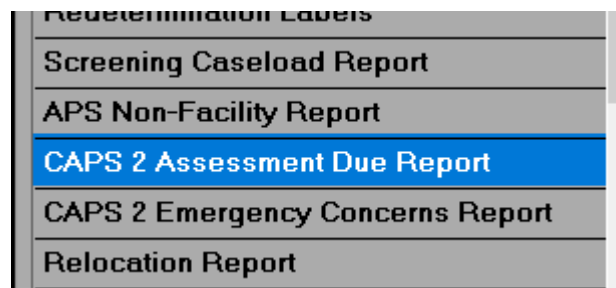
- | | |
|---|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging: Types A and B | <input type="checkbox"/> Health Services |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input type="checkbox"/> County DD program managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> Support Service Brokerage Directors | <input type="checkbox"/> Other (<i>please specify</i>): |
| <input type="checkbox"/> ODDS Children's Residential Services | |
| <input type="checkbox"/> Child Welfare Programs | |

Message: Effective Sunday 04/23/23, OA is being updated with a new report titled "CAPS 2 Assessment Due Report", which will replace the previous "CAPS 2 Assessment Review Report". The report is intended to be used by case managers to determine what CA/PS reassessments are due within the report parameters entered by the user. The updated report includes additional information that will help case managers better track when a reassessment must be completed.

- To generate the report:
 - Select "Reports" on the OA homepage, or
 - Select the "Reports" button on the OA homepage toolbar, or
 - Select "Reports" from the menu.



- Select the “CAPS 2 Assessment Due Report” on the Print Reports screen.



- Report parameters include the following:
 - Report Start Date and Report End Date
 - Both default to 00/00/0000
 - Select Living Situation(s):
 - Defaults with the “Select all Living Situations” checked, but users may uncheck the box and select only the desired living situation(s)
 - Select Worker(s):
 - The user who is logged in to OA is selected by default
 - The “Select all Workers” box is unchecked by default
 - Users can select and deselect worker name(s) they wish to include/exclude on their report

Enter parameters for CAPS 2 Assessment Due Report

Report Start Date: Report End Date:

Select Living Situation(s)

- Adult Foster Home
- Apartment
- Assisted Living Facility
- Child Foster Care

Select all Living Situations

Select Worker(s)

- Castillo, Maria
- Coleman, Jennifer
- Davis, Jack

Select all Workers

- The report can be generated for the following assessment types:
 - Title XIX
 - OPI
 - PAS
 - SPPC
- The report will include the following:
 - Report Period: Start date and end date (dates entered on the Print Reports screen)
 - Print Date (date the report is generated)
 - Worker Name
 - Branch #
 - Consumer Name
 - Prime #
 - Benefit Type
 - Assessment Type
 - Pay Date
 - Valid Until/Admin Date
 - Review Before Date
 - Benefit end date
 - Number of Assessments for Worker
 - Total number of Assessments
 - Page x of y

- Records will appear on the report if one of the following criteria is met:
 - The “Review Before” date for an assessment that is in “Comp” or “Admin” status falls within the selected report date range.
 - If an assessment meets the criteria, it must also have an associated benefit in Approved or Ended status.
 - If there is a “Review Before” date which is further in the future and from a different assessment, the individual result will not display on the report.
 - The benefit “End Date” for an Approved or Ended benefit falls within the report date range.
 - If two or more benefits are associated with an assessment, the benefit with the End Date furthest in the future will be listed on the report.
 - If the Report End Date is the last day of the month, the report will include records with a benefit End Date up to the next Pay Date after the Report End Date.

If you have any questions about this information, contact:

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