

Instructions for Registering & Reporting Case Management Client Data

All case management clients served through district centers are to be registered in the Oregon Access CA/PS assessment system. This includes OPI, OAA, Incomplete Assessment and Family Caregiver case managed clients. Case management clients who are not OPI recipients are identified as “Older Americans Act” (or “Title III”) or Incomplete Assessment case management clients.

INSTRUCTIONS

- Registration

For Older Americans Act and Oregon Project Independence Case management clients, enter client into Oregon Access, **assign a prime number** and complete the CA/PS assessment in the usual manner with the established instructions, as explained in the OPI Case Manager Desk Manual (OPI Case Management, Section 2

For Incomplete Assessment and Family Caregiver clients enter client into Oregon Access, **assign a prime number** and complete OAA screen.

Monthly Case Management service data for district center clients is reported to ADS each month.

A turnaround disk is sent out by ADS each month to the District Center. The following data is downloaded on to the disk:

- District Center two-letter code
- Client Prime or Case Number
- Client Name - Last and First
- Social Security Number
- Service Code
 - 34 - Family Caregiver Case Management
 - 35 - OAA Case Management
 - 35 - OPI Case Management
 - 37 - Alzheimer's Case Management
 - 3X – Incomplete Assessment
 - 38 – MPI Case Management
- Number of Service Units
 - Turnaround units are added to each client, (i.e. for Case Management OPI clients, service code 36, 0.5 turnaround units are added)
- Caseworker Code
- Client Status
 - 1 - OAA Case Management



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- 2 - OPI Case Management
- 34 - Family Caregiver Case Management
- 37 - Alzheimer's Case Management
- 3X – Incomplete Assessment
- 38 – MPI Case Management

The totals by service code are used for reporting to ADS on the monthly payment request form (Exhibit 5).

Central ADS

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