

How to Create a Service Group Letter

Overview

Case Management Entity (CME) staff can generate a Service Group Letter for an Oregon Needs Assessment (ONA) in eXPRS. This letter can be sent to the individual, and it informs them about specific results from that ONA, such as what their service group is and how they can learn more about it.

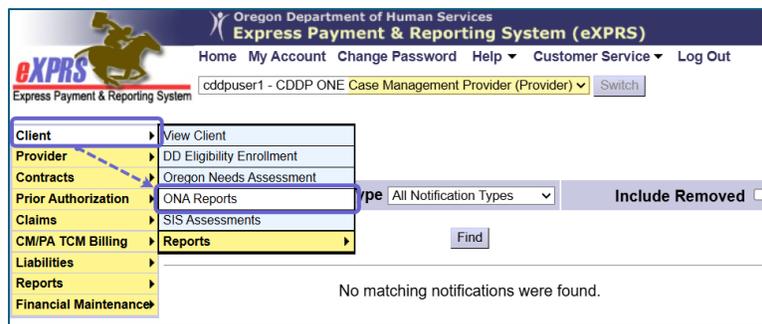
The letter also provides instruction on when and why they might contact their Service Coordinator or Personal Agent about the ONA. It informs them that the ONA does not determine the services they will receive or who provides those services. It also shows the rate that providers may be paid for the services they provide.

To create this report, a user must have one of the following roles:

- **ONA Assessor**
- **ONA SC/PA**
- **ONA Viewer**

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- 1) Log into eXPRS under the Case Management Provider role¹ and select **Client > ONA Reports**



¹ In the example shown, a CDDP user has selected the Case Management Provider role. However, a Brokerage and State Kids User has a similar role they can select.

- 2) On the **ONA Reports** page, select the following options:
 - 1) **Report > Service Group Letter**
 - 2) Enter Search Criteria and select **Find**

ONA Reports 1

* Report: Service Group Letter Report Glossary

At least one search criteria must be entered.

Assessment ID: 2

Client Prime: AM

Status: v

County: v

ONA Submit Date From: [calendar icon] ONA Submit Date To: [calendar icon]

ONA Expiration Date From: [calendar icon] ONA Expiration Date To: [calendar icon]

Find Reset

- 3) From the Result Set, select the following options for the ONA you want to create a Service Group Letter for:
 - 1) **Letter Type > Service Group Letter**
 - 2) **Print** Button

1 Letter Type	2	ID	Status	Prime	Client Name	County
Service Group Letter v	Print	539	Approved		MDOZKB, DGDDGOB	
v	Print	539	Approved		MDOZKB, DGDDGOB	
v	Print	539	Approved		MDOZKB, DGDDGOB	
v	Print	539	Approved		RATEXC, EBEEBTC	

Once Print is selected, the Service Group Letter will be created.

Service Group Letter - Service Group Letter

FUHQDI, KPKKPHI

You recently had an Oregon Needs Assessment (ONA) completed. The ONA is used to document your unique needs and determine your service group. You are in service group Low - 2. To learn more about the different service groups and how the ONA determines your service group, ask your services coordinator or personal agent for more information.