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 role[1] and select **Client > ONA Reports**

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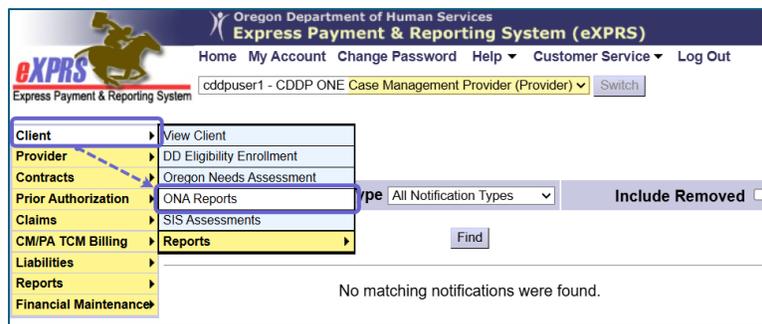
[1] In the example shown, a CDDP user has selected the Case Management Provider role. However, a Brokerage and State Kids User has a similar role they can select.

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

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

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