

## How to Find Service Group Information for Individuals with Very High Behavior or Very High Medical Needs

There are instances where Service Coordinators or Personal Agents may need to find individuals that are in Service Group 5 with Very High Medical (5m) or Very High Behavioral Needs (5b).

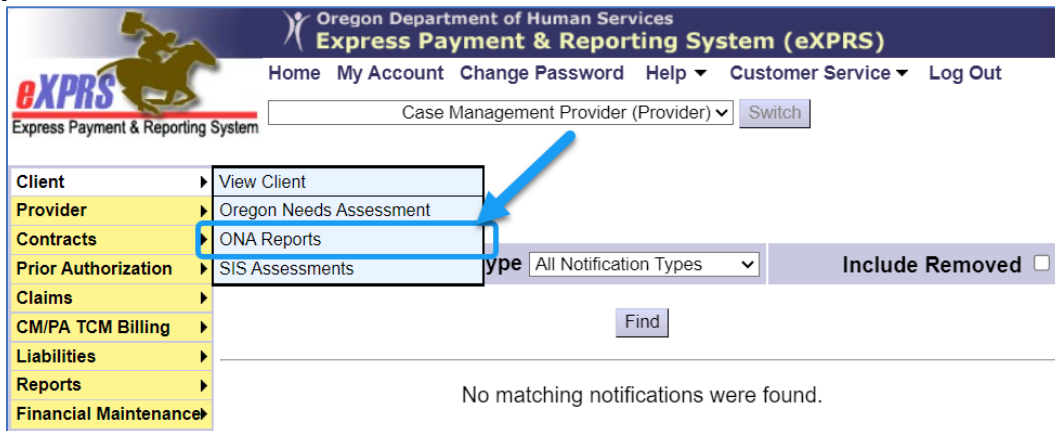
The **ONA Reports** page allows specific users to return a results list with information that can be used to infer that someone is in Service Group 5(m) or 5(b). These reports can pull SG information for an individual or for all those enrolled with your Case Management Entity (CME).<sup>1</sup>

To take the steps in this guide, users will need to be assigned one of following user roles for your type of CME:

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

### [How to Find SG Information for Individuals that are 5\(m\) or 5\(b\)](#)

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



<sup>1</sup> Detailed information on Service Groups and how they are evaluated in the ONA can be found on the **Compass Project: Service Group Framework** webpage, which is on ODDS' main website.

- 2) On the **ONA Reports > Service Group Report** dropdown, select one of the following reports:
- ONA Full
  - ONA Summary
  - Service Group Letter
  - Service Group Report

The screenshot shows the 'ONA Reports' interface. The 'Report' dropdown menu is open, showing options: 'Service Group Report' (selected and highlighted in blue), 'Comparative All Questions & Answers Report', 'Comparative Service Group Report', 'ONA Full', 'ONA Summary', 'Service Group Letter', and 'Service Group Report'. A blue arrow points to the selected option. Other fields like 'Assessment ID', 'Client Prime', 'Status', 'County', and date ranges are visible but not filled.

**TIP:** Each report in the **Report** dropdown on this page has a specific use. For more information about each of them, hover over the **Report Glossary** on the upper-right hand corner of the page. For the objective in this document, any of the reports highlighted above in blue will work.

- 3) Enter any search criteria needed to return individuals served by your Case Management Entity, and then select **Find**. Some sample criteria is shown below:

1. **Status:** Approved
2. **ONA Expiration Date From:** The start of the current month (e.g. 5/1/2024)
3. **ONA Expiration Date To:** The end of the month one full year later (e.g. 5/31/2024)

The screenshot shows the 'ONA Reports' search form with the following criteria entered: 'Report' is 'Service Group Report'; 'Status' is 'Approved' (marked with a blue circle '1'); 'ONA Expiration Date From' is '5/1/2023' (marked with a blue circle '2'); and 'ONA Expiration Date To' is '5/31/2024' (marked with a blue circle '3'). Other fields like 'Assessment ID', 'Client Prime', and 'County' are empty. A 'Report Glossary' link is visible in the top right.

- 4) From the Results list, you can view the Service Group information. Note the **Medical Score** Column (A) and **Behavior Score** Column (B). These are Yes/No columns. If the column is marked **Yes**, it indicates that the individual's ONA identifies them as having Very High Medical or Very High Behavioral Needs respectively.

In the example shown below, the individual in the third row is 5(b), and the individual in the fourth row is 5(m).

[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]										Export options: <b>A</b> CSV   <b>B</b> Excel   PDF   RTF					
ID	Status	Prime	Client Name	County	Service Setting	ONA Submit Date	ONA Expiration Date	Assessor	Enhanced	GSN Score	Medical Score	Behavior Score	Service Group	LOC	Risk Report
950					Other	5/1/2024	5/1/2024				No	No	5 - null	Approved	
950					Children's In-Home Services (SE151)	4/30/2024	5/2/2024				No	No	5 - null	Approved	
870					24hr Residential (SE50)	4/30/2024	4/30/2024				No	Yes	5 - null	Approved	
10					Children's Intensive In-Home (SE145)	4/30/2024	4/30/2024				Yes	No	5 - null	Approved	
10					Adult Foster Care (SE158)	4/29/2024	4/29/2024				No	Yes	5 - null	Approved	

**TIP:** You can also export and sort this data if needed.

Export options: **CSV** | **Excel** | **PDF** | **RTF**

Enhanced **GSN Score** **Medical Score** **Behavior Score** **Service Group** **LOC** **Risk Report**

For example, you can use Excel's **Filter** option to show only individuals who have a "Yes" value in the **Medical Score** or **Behavior Score** column.

## APPENDIX A: ONA Reports Search Results List Column Definitions

- **ID:** The ONA ID number assigned to the assessment by eXPRS.
- **Status:** Status of the Oregon Needs Assessment.
- **Prime:** The individual's DHS Prime Number.
- **Client Name:** The name of the individual being assessed.
- **County:** The individual's home county.
- **Service Setting:** The individual's service setting at the time of the assessment.
- **ONA Submit Date:** The date the assessment was submitted out of **draft** status.
- **ONA Expiration Date:** The date the assessment expires.
- **Assessor:** If the ONA was completed by a Certified ONA Assessor, the name of the assessor will populate here. Otherwise, the field will be blank.
- **Enhanced:** A Yes/No value that indicates that an individual is assessed to have certain extraordinary support needs (5b/5m). If enhanced, then a PSW employed by the individual can receive additional training and may be eligible for a higher rate of pay.
- **GSN Score:** The numeric score result for the individual's ADL/IADL assessed support needs.
- **Medical Score:** A Yes/No value that indicates whether the ONA for the individual indicates that they are 5(m), having very high medical needs.
- **Behavior Score:** A Yes/No value that indicates whether the ONA for the individual indicates that they are 5(b), having very high medical needs.
- **LOC:** Status of the Level of Care (LOC) generated from the completed ONA. Also a hyperlink to open the ONA's Level of Care report.
- **Risk Report:** The date the risk report was created; also a hyperlink to open the Risk report for more details.