How to Find Expiring ONAs in eXPRS
CMEs
(updated 12/7/2021)

To assist Case Management Entities (CMEs) in making sure that the individuals they coordinate services for maintain continuity of care, CMEs can search for Oregon Needs Assessments (ONAs) that are ending or due to expire. Doing so will enable CMEs to keep track of ONAs that are due to be completed again and prevent loss of the individual's Medicaid eligibility due to ONA lapse/gaps.

To find expiring ONAs:

1. Log in to eXPRS. If you have multiple **Organization/Program Area** log in options, be sure to select the correct one, as shown below.

    CDDPs – select "**Case Management Provider (Provider)**"

    Login

    | Login Name: | userID |
    | Password: | ••••••••• |
    | Organization/Program Area: | CME Case Management Provider (Provider) ⌄ |

    Submit

    Brokerages – select "**Case Mgmt Prov (Provider)**"

    Login

    | Login Name: | user ID |
    | Password: | ••••••••• |
    | Organization/Program Area: | BROKERAGE /Case Mgmt Prov (Provider) ⌄ |

    Submit

    State Kids services – select "**State CM (Provider)**"

    Login

    | Login Name: | userID |
    | Password: | ••••••••• |
    | Organization/Program Area: | State CM (Provider) ⌄ |

    Submit

2. From the yellow, left-hand menu, click on *Client* → *Oregon Needs Assessment*.
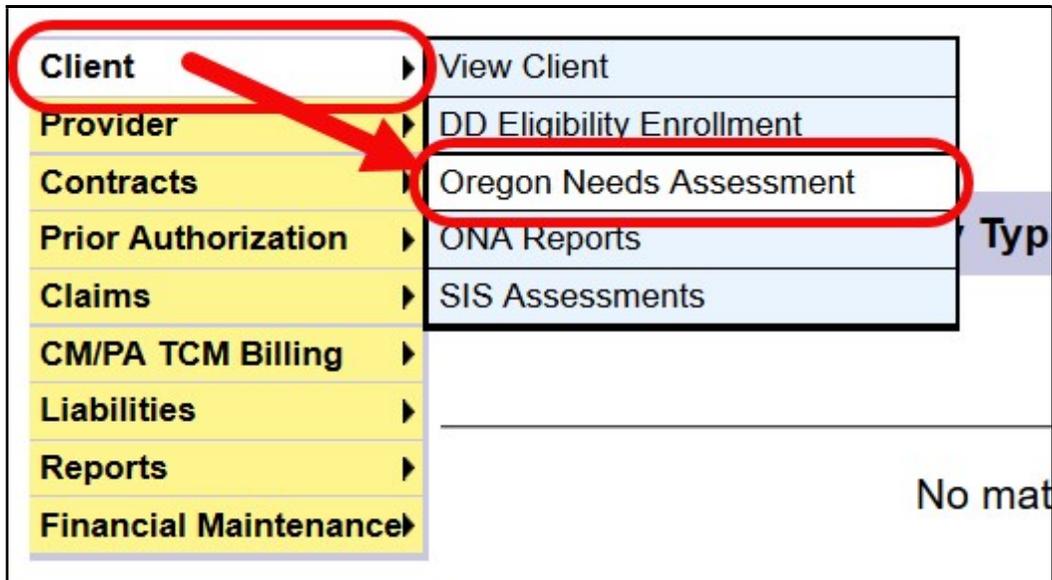
3. In the **Find Oregon Needs Assessment** page, search for your expiring ONAs by using the criteria:
   - **ONA Expiration Date From** = report start date
   - **ONA Expiration Date To** = report end date
     - → *Pro Tip*: Search using a date range large enough and including future dates to return expiring ONAs in the future to give ample time to schedule a new assessment or ISP team meetings, as needed.
   - **Display Format =** Expiration Report columns

   Click **Find** to search.

4. Any ONAs with end/expiration dates that that fall within the **ONA Expiration Date From/To** date range used will return below. Export your results list to an Excel spreadsheet and save the file.

5. Now return to the **Find Oregon Needs Assessment** page and pull a second list to see if any of the individuals with expired ONAs retuned in #3 above have had a new ONA completed/submitted.

   Search using this suggested criteria:
   - **ONA Submit Date From** = the first day of the month **PRIOR** (*ex: 4/1/2021*) to the date used for *ONA Expiration Date From* (*ex: 5/1/2021*) in #3 above.
   - **ONA Submit Date To** = the same date used for the *ONA Expiration Date To* in #3 above (*ex: 6/30/2021*).

   Click **Find** to search.

6. When the results list returns for this search, export the new list to an Excel spreadsheet and save the file.

7. Now copy/paste the data rows from one of the two Excel spreadsheets into the other. You may need to add a couple of new columns to accommodate all the data from both spreadsheets together. Once combined and saved, you can sort or filter the new combined list to see who of the Expired ONA list **_does not have_** a new ONA that has been submitted to **_approved_** status. Theses are the individuals who need new ONAs completed.