

## How to Run the Expiring POC Report 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, eXPRS has a report for CME users to track when individual's Plans of Care are due to expire.

Users will need one of the following roles assigned to run this report:

- **Brokerages:**
  - POC Viewer
  - POC Preparer
  - POC Manager
  - POC Super User
  - eXPRS Report Access Only
  
- **Local Authority/CDDPs:**
  - POC Viewer
  - POC Preparer
  - POC Manager
  - POC Super User
  - eXPRS Report Access Only
  
- **State Kids Services (CIIS/Res):**
  - POC Viewer
  - POC Manager
  - POC Super User
  - View Only

### To run the Expiring POC report:

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 “**(Local Authority)**”

**Login**

**Login Name:**

**Password:**

**Organization/Program Area:**  ▼

Brokerages – select “(Contractor)”

**Login**

**Login Name:**

**Password:**

**Organization/Program Area:**  ▼

State Kids services – select “(State)”

**Login**

**Login Name:**

**Password:**

**Organization/Program Area:**  ▼

- From the yellow, left-hand menu, click on **Plan of Care** → **Reports** → **Expiring POC**. You may also find this report under the **Reports** menu option as well.

The screenshot shows a web application interface. On the left is a yellow navigation menu with the following items: Client, Provider, Contracts, Prior Authorization, Plan Of Care, Claims, CM/PA TCM Billing, Liabilities, Reports, and Financial Maintenance. On the right, under the heading 'My Notifications', there is a section 'Filtered By Type' with a dropdown set to 'All Notification Types'. Below this is a table of notifications. The 'Plan Of Care' menu item is circled in red, with an arrow pointing to the 'Plan Of Care' row in the notification table. Another arrow points from the 'Reports' row in the table to the 'Expiring POC' notification. A third arrow points from the 'Expiring POC' notification back to the 'Reports' row in the table. A 'Find' button is visible to the right of the notification table.

- In the report criteria page, enter the criteria needed to return the data desired. At a minimum, a date range is required\*. eXPRS will default to the current month + the next calendar month and return all Plans of Care that have end dates (ie: expire) within this date range. However, you can enter any date range you wish.

**Expiring POC Criteria**

Expiring POCs.

\* Start Date: 12/01/2021

\* End Date: 01/31/2022

DHS Contract Num:

Client Prime:

Format: HTML

Submit Close

- When the report results return, you will see which individuals' Plans of Care end or expire within that date range you entered. This should help CME staff in their annual service planning for the individuals they serve.

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Oregon Department of Human Services  
Express Payment & Reporting System (eXPRS)

**Expiring POC**  
2021-12-01-2022-01-31

Plan Id	Client Prime	Client Name	Plan Start	Plan End	Authorizing Contract	Authorizing Entity
40****6	xyz0000a	BAYCON, CHRIS P	1/1/2021	12/31/2021		Oregon CDDP CM Provider SE48 All
41****5	xyz0000b	BOATMAN, FISCHER	2/1/2021	1/31/2022		Oregon CDDP CM Provider SE48 TCM
41****7	xyz0000c	DACTYL, TERRY	2/1/2021	1/31/2022		Oregon CDDP CM Provider SE48 TCM
41****5	xyz0000d	THYME, JUSTIN	2/1/2021	1/31/2022		Oregon CDDP CM Provider SE48 TCM
41****0	xyz0000e	VADAR, ELLA	2/1/2021	1/31/2022		Oregon CDDP CM Provider SE48 TCM

- The report results can be exported or printed, if desired, by using the icon options in the top menu bar of the report page.



