

How to Use the View Change in Service Group Report

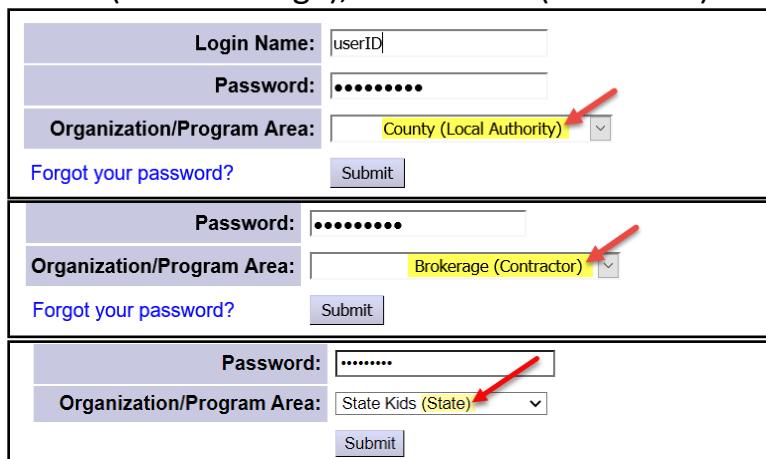
The **View Change in Service Group Report** allows users to get a report of individuals whose Service Group has increased or decreased. This can help CME staff to identify and update POCs and Add Ons as needed.

To follow the steps in this guide, users will need one of the following roles¹:

- **POC Manager**
- **POC Super User**

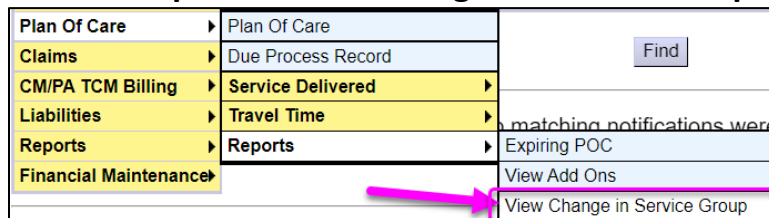
How to Use the View Change in Service Group Report

1) Login to eXPRS. If users have multiple login options, use Local Authority (for CDDPs), Contractor (for Brokerage), or State for (State Kids).



The image shows three sequential screenshots of the login form. Each screenshot has a 'Forgot your password?' link and a 'Submit' button. The first screenshot shows 'Organization/Program Area' set to 'County (Local Authority)'. The second shows 'Brokerage (Contractor)'. The third shows 'State Kids (State)'. Red arrows in each screenshot point to the dropdown arrow of the 'Organization/Program Area' field.

2) Select **Plan of Care > Reports > View Change in Service Group**².



The image shows a navigation menu with the following structure:

- Plan Of Care
 - Plan Of Care
- Claims
 - Due Process Record
- CM/PA TCM Billing
 - Service Delivered
- Liabilities
 - Travel Time
- Reports
 - Reports
- Financial Maintenance

On the right side of the menu, there is a 'Find' button and a list of items: 'matching notifications were', 'Expiring POC', 'View Add Ons', and 'View Change in Service Group'. A pink arrow points to the 'View Change in Service Group' option.

¹ These roles have the **Retrieve – Service Group Changes** permission.

² This option also appears under the **Reports** section on the Left Navigation Menu

3) On the **Find Service Group Changes for POC** page, enter search criteria and select **Find**.

Find Service Group Changes for POC

This search page is intended to help users find Service Groups that have changed, Plans of Care that need adjustment and ending Add ons. User must select the type of search they are looking for by selecting the Date Search Criteria and entering a date range. Search is not case sensitive. Criteria are cumulative.

Results returned limited to 20,000 rows. If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search to return a smaller dataset.

Search will return only decreases in SG unless you select SG increases or if you search by Expiring Add On Dates.

If a result record includes an Add On, the CME should address whether the Add On needs to change as a result of the SG change.



Results Key: Consistent with functionality in the Due Process and Add Ons sections of POC.



Results fields in this search page will reflect warning/compliance indicator highlights.


Pink highlight indicates an Hour Limit that is above the SG limit.



Yellow highlight indicates that the Hour Limit is over the SG Limit with active Due Process, or an Add On associated with the record needs to be addressed.

Green highlight indicates a SG change, but the Hour Limit is still within the Service Group Hours Limit.



Service Location:  ONA ID: 

Rendering/Agency eXPRS Provider ID:  Service Element: 


Client Prime: 


POC Start Date:  POC End Date: 

Exact: Yes No Exact: Yes No

ONA Submit Date From:  ONA Submit Date To: 





Exact: Yes No Show In Home Hours Info:

Due Process Status:  Include SG Increases:

Max Displayed: 

Tip: Like with other search pages in eXPRS, the more criteria you enter, the smaller your result set will become. See **Appendix A** for definitions of the Search Criteria.

4) Review the Results list and select the **Plan ID** hyperlink to go directly to the individual's POC associated with the change in Service Group.

Export options:  CSV |  Excel |  PDF |  RTF

Plan ID	Client Prime	Client Name	SE	Plan Of Care Dates	ONA Start Date	ONA End Date	Current Service Group	Previous Service Group
6	33		50	6/1/23 - 5/31/24	4/3/2023	4/30/2024	3	5
6	33		54	6/1/23 - 5/31/24	4/3/2023	4/30/2024	3	5
6	33		257	6/1/23 - 5/31/24	4/3/2023	4/30/2024	3	5
6	33		50	6/1/23 - 5/31/24	4/3/2023	4/30/2024	3	5
6	33		54	6/1/23 - 5/31/24	4/3/2023	4/30/2024	3	5
6	33		257	6/1/23 - 5/31/24	4/3/2023	4/30/2024	3	5
6	71		151	7/1/23 - 6/30/24	5/17/2023	5/31/2024	4	5
7	26		151	8/1/23 - 7/31/24	6/27/2023	6/30/2024	2	3
7	18		151	9/1/23 - 8/31/24	7/12/2023	7/31/2024	3	5
7	36		151	10/1/23 - 9/30/24	8/17/2023	8/31/2024	3	4

Appendix A: Search Criteria Definitions

Find Service Group Changes for POC

This search page is intended to help users find Service Groups that have changed, Plans of Care that need adjustment and ending Add ons. User must select the type of search they are looking for by selecting the Date Search Criteria and entering a date range. Search is not case sensitive. Criteria are cumulative.

Results returned limited to 20,000 rows. If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search to return a smaller dataset.

Search will return only decreases in SG unless you select SG increases or if you search by Expiring Add On Dates.

If a result record includes an Add On, the CME should address whether the Add On needs to change as a result of the SG change.

Results Key: Consistent with functionality in the Due Process and Add Ons sections of POC.

Results fields in this search page will reflect warning/compliance indicator highlights.

Pink highlight indicates an Hour Limit that is above the SG limit.

Yellow highlight indicates that the Hour Limit is over the SG Limit with active Due Process, or an Add On associated with the record needs to be addressed.

Green highlight indicates a SG change, but the Hour Limit is still within the Service Group Hours Limit.

Service Location: <input type="text"/>	ON A ID: <input type="text"/>
Rendering/Agency eXPRS Provider ID: <input type="text"/>	Service Element: All <input type="text"/>
Client Prime: <input type="text"/>	
POC Start Date: <input type="text"/>	POC End Date: <input type="text"/>
Exact: <input type="radio"/> Yes <input checked="" type="radio"/> No	Exact: <input type="radio"/> Yes <input checked="" type="radio"/> No
ON A Submit Date From: <input type="text"/>	ON A Submit Date To: <input type="text"/>
Exact: <input type="radio"/> Yes <input checked="" type="radio"/> No	Show In Home Hours Info: <input type="checkbox"/>
Due Process Status: Select... <input type="text"/>	Include SG Increases: <input type="checkbox"/>
Max Displayed: 25 <input type="text"/>	

Find Reset

- **Service Location:** Returns only the records matching the ID of the Service Location Record entered.
- **ON A ID:** Returns only the records matching the ON A ID that resulted in an increase or decrease in an individual's Service Group.
- **Rendering/Agency eXPRS Provider ID:** Returns only the records matching the ID of the Provider entered.
- **Service Element:** Returns only records with the selected Service Element.
- **Client Prime:** Returns only records associated to the entered Prime.
- **DHS Contract Num (State Users Only):** Limits the result list to only POCs managed by a specific Case Management Entity.
- **POC Start Date (including Exact radio buttons):** The Start Date for the POCs that will return in the results list. Records with a POC that start on or after after the date will return. If exact is selected, only records with a POC with the exact start date entered will return.
- **POC End Date (including Exact radio buttons):** Results will include all POCs that overlap that date with a service group reduction (or increase if box is checked). If exact is selected, only records with a POC with the exact end date entered will return.

- **ONA Submit Date From (including Exact radio buttons):** Results will include all POCs that end before or cross over that end date with service group reduction (or increase if box is checked). If exact is selected, only records with an ONA Submitted on the date entered will return.
- **ONA Submit Date To:** Returns all service group changes for ONAs that were submitted on or before the date entered.
- **Show In-Home Hours Info (Checkbox):** Checking this box adds the following six columns to the results list –
 - **Service Group Monthly Hours Limit**
 - **Current Hour Limit**
 - **Add On Hours**
 - **Out of Compliance**
 - **Total Monthly Limit**
 - **Due Process Effective Date**
- **Due Process Status:** Returns only records that have Due Process in the selected status.
- **Include SG Increases:** Adjusts the results list to show both Service Group increases and decreases.

Appendix B: Result List Field Definitions

Plan ID	Client Prime	Client Name	SE	Plan Of Care Dates	ONA Start Date	ONA End Date	Current Service Group	Previous Service Group	Service Group Monthly Hours Limit	Current Hour Limit	Add On Hours	Out of Compliance	Total Monthly Limit	Due Process Effective Date
			151	1/1/19 - 12/31/19	10/24/2019	10/31/2020	4	5	96	11.00	0.00	No	11.00	
			151	3/1/19 - 2/29/20	11/26/2019	11/30/2020	4	5	96	32.00	0.00	No	32.00	
			49	5/30/19 - 4/30/20	11/21/2019	4/27/2020	2	3	100	106.00	0.00	Yes	106.00	

- **Plan ID:** ID of the Plan of Care affected by the Service Group change.
- **Client Prime:** The prime number for the individual.
- **Client Name:** The name of the individual.
- **SE:** The Service Element the Individual is receiving on associated Plan of Care. It is possible that multiple rows return displaying each Service Element.
- **Plan of Care Dates:** The date range of the Plan of Care affected by the Service Group change.
- **ONA Start Date:** The start date of the Oregon Needs Assessment that resulted in a change to the individual's Service Group.
- **ONA End Date:** The end date of the Oregon Needs Assessment that resulted in a change to the individual's Service Group.
- **Current Service Group:** The new Service Group for that individual.
- **Previous Service Group:** The old Service Group for that individual.

- **Service Group Monthly Hours Limit:** The monthly hours limit associated with the individual's service group.
- **Current Hour Limit:** The current max hours limit on the individual's Plan of Care associated with the row. If there is more than one segment for hours limits, it will pull the Hours segment that contains the ONA Submitted Date.
- **Add On Hours:** The individual's In-home Hours add on that applies to the row.
- **Out of Compliance (Yes/No):** A yes/no value that indicates whether the individual's current assessed hours limit (plus Add On hours) is in compliance with their service group or not.
- **Total Monthly Limit:** The sum of the individual's current hour limit and in-home hour add ons.
- **Due Process Effective Date:** Displays date value from Due Process Effective Date field in Due Process section of POC Overview Page.