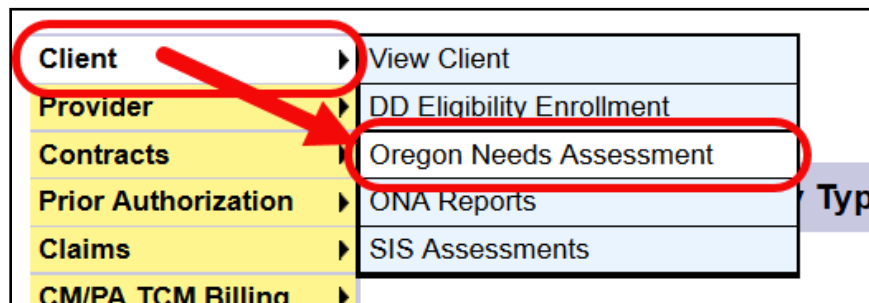


# Finding Expiring ONAs

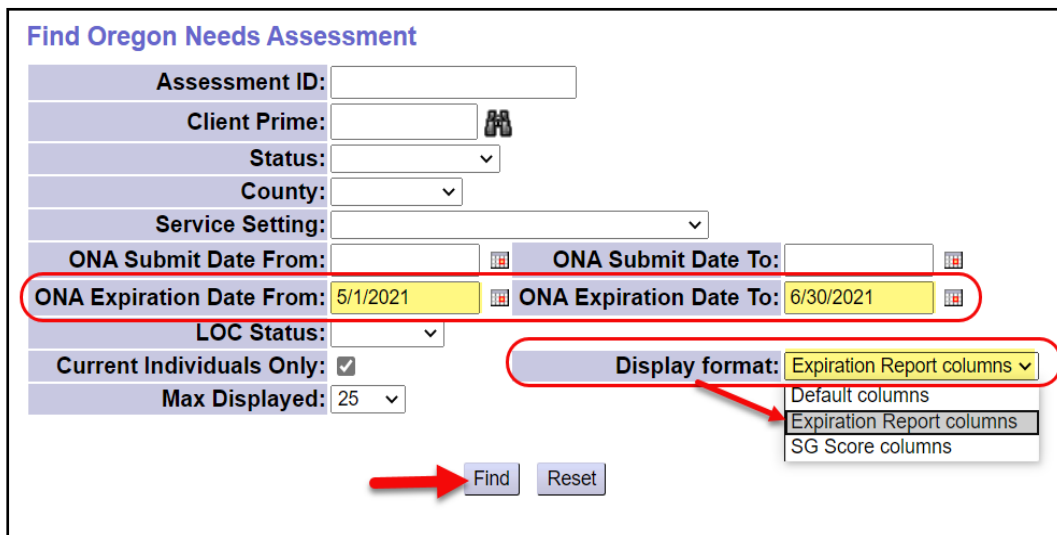
Case Management Entity (CME) Staff can search for Oregon Needs Assessments (ONAs) that are ending or due to expire. Doing so will enable CMEs to keep track of ONAs that are due to be completed again and prevent loss of the individual’s Medicaid eligibility due to an ONA lapse.

## Finding expiring ONAs

1. Log in to eXPRS under the Case Management Provider role, then select **Client > Oregon Needs Assessment**.



2. On the **Find Oregon Needs Assessment** page, enter search criteria and select **Find**.



**TIP:** In the example above, **ONA Expiration Date From** and the **ONA Expiration Date To** criteria are entered, along with the **Display Format** of “Expiration Report columns”. Searching using a date range large enough and including future dates to return expiring

ONAs will give enough time to schedule a new assessment or Individual Support Plan meetings.

- Any assessments with expiration dates that fall within the **ONA Expiration Date From/To** date range used will return. The list can be exported to a spreadsheet and saved.

ID	Status	Prime	Client Name	County	Birthday	Age	Service Setting	ONA Submit Date	ONA Expiration Date	Assessor Name	Service Coord./Personal Agent
2*****7	Approved	xyz0000a	VADER, ELLA		m/d/1965	55	Other	6/23/2020	6/30/2021	Assessor Name	SC/PA Name
2*****5	Approved	xyz0000b	BAYCON, CHRIS P		m/d/2015	6	Children's In-Home Services (SE151)	6/19/2020	6/30/2021	Assessor Name	SC/PA Name

- Return to the **Find Oregon Needs Assessment** page and pull a second list to see if any of the individuals with expired ONAs found in step 3 have had a new ONA 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 step 3.
- ONA Submit Date To:** The same date used for the **ONA Expiration Date To** in step 3 above (ex: 6/30/2021).

**Find Oregon Needs Assessment**

At least one search criteria must be entered.

Assessment ID:

Client Prime:

Status:

County:

Service Setting:

**ONA Submit Date From: 4/1/2021** **ONA Submit Date To: 6/30/2021**

ONA Expiration Date From:  ONA Expiration Date To:

LOC Status:













Current Individuals Only:  **Display format:** Default columns





Max Displayed: 25

**Find**

5. Export the new list to an Excel spreadsheet and save the file.

**Find Oregon Needs Assessment**  
At least one search criteria must be entered.

Assessment ID:   
Client Prime:    
Status:    
County:    
Service Setting:    
ONa Submit Date From:   ONa Submit Date To:    
ONa Expiration Date From:   ONa Expiration Date To:    
LOC Status:    
Current Individuals Only:   Display format:    
Max Displayed:  

Export options:  CSV |  Excel |  PDF |  RTF

ID	Status	Prime	Client Name	County	Service Setting	ONa Submit Date	ONa Expiration Date	Assessor	LOC	Risk Report
2*****7-1	Approved	xyz0000e	BOATMAN, FISHER		Children's In-Home Services (SE151)	5/13/2021	5/31/2022	Assessor Name	Approved	

6. Combine the data from both spreadsheets together. 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 use sort, filter, functions, or other methods to see who of the Expired ONA list *does not have* a new ONA that has been submitted to **approved** status. These are the individuals who need new ONAs completed.