

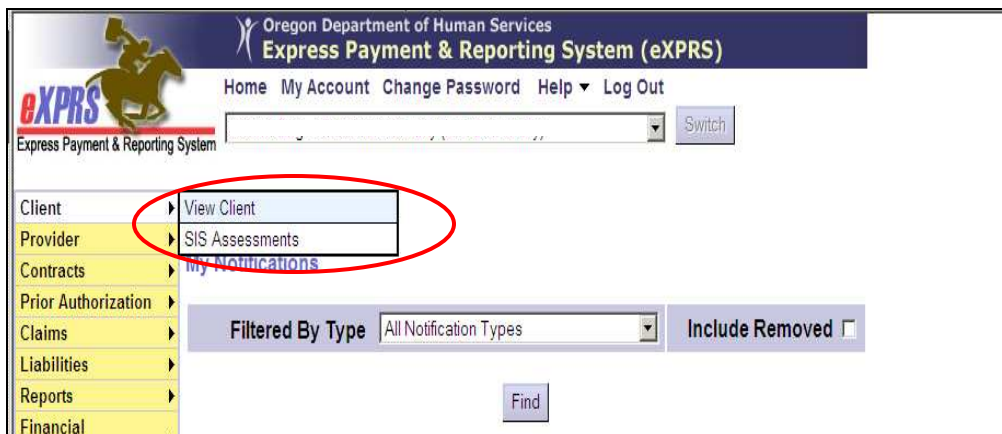
How to search for and view an individual's SIS Assessment Record

You can now use eXPRS to view an individual's **finalized (status = FINAL)** SIS record for their SIS Assessments. This information will enable the user to see the assigned SIS Tier and view, download, save and/or print the individual's SIS Assessment Summary Report.

Please note: At this time, an individual's Tier information is NOT linked to any other functionality in eXPRS. Local Authority users who complete CPA work will have to still determine the individual's SE50 service rate that is applicable for their Tier and provider site, and enter that rate information manually in the individual's SE50 CPA.

To find an individual's SIS assessment record in eXPRS:

1. Login to eXPRS. If you have multiple roles in eXPRS, you will want to be working as the role appropriate for the work you are doing.
2. From the **yellow** left-hand navigation menu, click on **CLIENT → SIS ASSESSMENTS**. This will take you to the **View SIS Assessment** page where you can search for a individual's SIS assessment record or view a list of records for individuals associated with your organization.



3. In the search criteria window, enter the information needed to bring back the individual's record you want or a list of SIS assessment records.

The screenshot shows the 'View SIS Assessment' search criteria window in the eXPRS system. The window contains a message: 'At least one search criterion must be entered.' Below this message are several search criteria fields arranged in three columns. The first column includes: SIS ID, Last Name, Assessment Specialist, SIS Assessment From, SIS File Received From, HSRI File Received From, and Updated Date. The second column includes: Client Prime, First Name, Status (set to 'Final'), SIS Assessment To, SIS File Received To, HSRI File Received To, and Client Found?. The third column includes: Birth Date, Middle Name, Risk Factors, HSRI Received?, and Assessment Code?. There are 'Find' and 'Reset' buttons at the bottom of the search criteria section.

NOTE: The **Status** field is defaulted to **Final** and cannot be changed. This is because non-State users are only allowed to view the record once it is finalized and the Tier has been assigned.

- To search for a specific individual's SIS record, it's best to search by their **Client Prime** and leave the other fields blank. This will bring back the specific individual's entire SIS assessment history, if available (e.g.: finalized).
 - You want to find search for a list of SIS assessments that were completed on a certain date or within a date range, enter those dates in the **SIS Assessment From** and **SIS Assessment To** fields.
4. With the search criteria entered, click **FIND**. You will get a list of the finalized SIS records (if any) that match your search criteria.
 5. From the search results list, click on the **blue SIS ID** number (which is a hyperlink) in the far left-hand column to view the SIS assessment record. This will take you to the SIS record details in the **SIS Assessment** page.

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At least one search criterion must be entered.

SIS ID: Client Prime: Birth Date:
 Last Name: First Name: Middle Name:
 Assessment Specialist: Status: Final Risk Factors:
 SIS Assessment From: SIS Assessment To:
 SIS File Received From: SIS File Received To: HSRI Received?:
 HSRI File Received From: HSRI File Received To: Assessment Code?:
 Updated Date: Client Found?:

Find Reset

Export options: CSV Excel PDF RTF

| SIS ID | Status | Assessment Date | Client Prime | Name | Birth Date | SIS Received | HSRI Received | Client Found | Assessment Specialist |
|--------|--------|-----------------|--------------|------|------------|--------------|---------------|--------------|-----------------------|
| 176782 | Final | 11/24/2010 | | | | 3/28/2012 | 3/28/2012 | Y | lwecker |
| 257303 | Final | 1/26/2012 | | | | 3/28/2012 | 3/28/2012 | Y | CThompson |
| 262634 | Final | 3/19/2012 | | | | 3/28/2012 | 3/28/2012 | Y | lwecker |

Click on the SIS ID number to open a record.

6. Once in the **SIS Assessment** record page, you can see the details related to that individual's finalized SIS record(s). This page is divided into three sections.

- In section **A**: lists the individual's information and record status;
- In section **B**: lists the information for the established Tier, effective dates, and rate for a Tier 7 (if applicable);
- In section **C**: displays other information about the SIS assessment, including the SIS Report.

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SIS ID: 176782 **Status:** Final

Assessment Date: 11/24/2010 **Client Name:**

Client Prime: **Birth Date:**

Assessment Code: MCL T18

Tier and Rate Authorizations

| Status | Tier | Approval Date | Effective Date | End Date | SE | Proc | Mod | Rate |
|--------|------|---------------|----------------|------------|----|------|-----|------|
| Active | 5 | 2012-03-28 | 2012-03-28 | 2015-11-24 | | | | |

Service Coordinator: T Clackamas County

Assessment Specialist: kwecker Kay Weckerling

Other Assessment Information: 1. MCL T18 2. Mailing Address SE Washington, Hillsboro, OR 97123

SIS Report: Client_SIS_Assessment_Summary_as.pdf [View](#)

[Click here to view, download and save the SIS Report](#)

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Below are descriptions of some of the fields in Sections A and B:

- **SIS ID** – unique identifier for each assessment record, assigned by AAIDD.
- **Status** – status of the assessment record, determined by the ReBAR Program. Non-State users will only see **FINAL** assessment records.
- **Assessment Code** – rate conversion or mandated caseload code determined at the time the assessment was completed.
- **Tier** – the established support level assigned to the individual for the **Effective Dates**, based on the assessment.

7. If the the individual has been referred for Tier 7 Review, section B (the Tier and Rate Authorizations) will have a will have a second row of information for the individual with Tier 7 indicated and with a status of **Pending**.

| Tier and Rate Authorizations | | | | | | | | |
|------------------------------|------|---------------|----------------|------------|----|------|-----|------|
| Status | Tier | Approval Date | Effective Date | End Date | SE | Proc | Mod | Rate |
| Active | 6 | 2012-03-21 | 2012-03-21 | 2017-03-01 | | | | |
| Pending | 7 | 2012-03-21 | 2012-03-21 | 2017-03-01 | | | | |

After the Tier 7 Review Committee has made a decision, this pending line entry will be updated to reflect their decision. If Tier 7 is approved, a rate will be added in the rate column.