

Did you Know?

SC/PA Annual ONA Guidance

October 2021

COVID-19 Related Information -

See: [Developmental Disabilities Worker Guide](#)

General Annual Assessment Guidance:

Double Check Identifying Information

- Double check identifying information (name and date of birth) to ensure you are creating an annual assessment for the correct individual.

Age Specific ONAs

- The ONA determines age based on the date the ONA is created with a 60 day grace period.
- A certified assessor must create the ONA for a child turning 3, 4, 5, 8, 12, 15, and 18

➤ Before the birthday: 60 days or less

Or

➤ After the birthday: 61 or more days before the next birthday.

- The meeting should be scheduled with these guidelines in mind to ensure the ONA age is correct.

Delete Your Draft

- If a certified assessor cannot complete the ONA before the LOC expires, do not delete the ONA. Write a note on the demographics page in the case management entity notes box indicating a potential change in need and submit the ONA
- If you create an ONA and then refer it for a certified assessor to complete, complete the following steps: Go to the last page of the draft on the Comprehensive Review page and click on 'Delete ONA'

Nursing & Other Specialized Services and the ONA Interview

- When applicable and the individual or guardian approves, invite Direct Nursing Support, Long-Term Community Care Nurses or others who provide specialized service to attend the assessment interview.

The Annual ONA Must be Created *and* Submitted Within 30 days

- Create a draft of an ONA that you will be submitting within 30 days.
- Do not let a draft of an ONA linger un-submitted in eXPRS.
- An ONA is not considered complete until it has been *submitted* in eXPRS.
- The date entered in the “Date Completed” field on the demographics page should match the computer generated submitted date stamp on the bottom of the demographics page when submitted.
- ONAs must be submitted prior to the expiration of the LOC/ONA.

Expired ONAs = Lapsed LOC

- If the ONA expires on the 30th of the month and you submit the annual assessment on the 1st of the following month, *there is no lapse* and no exception request is needed
- If the ONA expires on the 30th and you submit it the 2nd or later of the following month, the ONA and LOC have expired, an exception request is needed
- In the event the ONA and LOC expires, you need to submit an exception request using the exception request form: Explain what parts of the ONA were completed and why the ONA and LOC expired.

<https://sharedsystems.dhsoha.state.or.us/DHSForms/Served/se0514ddi.pdf>

When to Complete an ANA/CNA

- There is an increase in support needs
- The individual is new to in-home services, or
- The ANA/CNA is needed to determine enhanced or exceptional eligibility.
- The ONA meets the requirement for the yearly functional needs assessment
- There is no reason to complete an annual ANA/CNA See PT 18-043 at <https://www.oregon.gov/dhs/SENIORS-DISABILITIES/DD/Transmittals/pt18043.pdf> for details

Transportation Item (15a) *Change in assessor Guidance*

- If an individual cannot drive themselves but uses public transportation without support, the assessor will consider the support needed. Item 15a should be coded at least 'Partial/Moderate' because someone else is completing the physical support of driving for them.

eXPRS - known Issues

- The coding for psychiatric therapies continues to occasionally disappear from the list of treatments and therapies
 - Ask your certified assessor to enter the coding for the item so you can submit your annual assessment prior to the LOC/ONA expiration date.

Risk Report

- When you 'save' the report it saves it as a draft.
- Be sure to click on the 'complete' button when you are finished.

If you have questions regarding this information, or suggestions for future topics you'd like us to address contact:

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