CCare Eligibility Database Instructions

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Introduction

The CCare eligibility database is a web-based system that contains eligibility information, including citizenship status, for every CCare client in the state. It was designed to standardize eligibility determinations for CCare clients and providers and to maintain compliance with federal Medicaid eligibility regulations. The database coordinates client enrollment information statewide so that once enrolled, clients may access services at any CCare site. Clients must re-enroll annually. The database is located at:

https://fpep.ahlerssoftware.com

CCare providers should use the database to check or confirm CCare eligibility status, enroll or re-enroll a client, request an Oregon birth record confirmation, and update citizenship and other eligibility information. When CCare claims are processed monthly, the database confirms client eligibility for the date of service. The database supports CCare program integrity and monitors trends in enrollment and eligibility.
A user ID and password are required to access the CCare eligibility database. To request a user ID and password, use the form in Section D, Exhibit 2 and submit it to Ahlers & Associates. For information security, each user should have an individual user ID and password. Also, unique logons are helpful for troubleshooting and training purposes.

Below is the CCare Eligibility Database entry page found at https://fpep.ahlerssoftware.com:

To start using the CCare eligibility database, enter your login and password on this screen and click on the Login button.
Quick Reference: Main Database Tasks

This section is intended as a quick reference for some of the main database tasks. More detailed, field-by-field instructions and screen captures can be found in subsequent sections.

Establishing eligibility for a new client

1. Search the database to see if the client already has a record. Search multiple times, using different fields on the Search for a Client screen under the Clients tab, such as the client’s Social Security number (SSN), to ensure that a duplicate record is not created.
2. Once it has been determined that the client is not already in the database, click the Add a New Client navigation link under the Clients tab to start a new record.
3. Enter all the required information on the Client Information screen. The enrollment date should match the date on the paper Enrollment Form signed by the client.
4. When all the information has been entered, save the record by clicking on the Save Client Info button at the bottom of the screen. If the information meets CCare eligibility requirements, the system will generate a CCare number and eligibility dates for the client.

Reasonable opportunity period (ROP) – citizenship and identity documentation exception

The reasonable opportunity period (ROP) is a special option that may be used in certain circumstances to enroll or re-enroll clients who cannot immediately provide full documentation of their U.S. citizenship. It may only be used once per client and allows a 45-day “reasonable opportunity” period during which the client may receive CCare services while working with CCare staff to obtain citizenship documentation. All other CCare eligibility criteria must still be met. For a complete description of the ROP option, see Section C of the Reproductive Health Program Manual. If you use the ROP, please remember:

- If the client was born in Oregon, complete a Birth Record Request (described on page 6) so that CCare state staff can search for the client’s birth certificate electronically.
- If the client is a teen, enrolled using the temporary 477-47-7477 SSN, and was born outside of Oregon, have the client fill out a birth certificate request for that state, so that CCare staff can purchase the documentation on the client’s behalf.
- Ask the client to bring in any remaining documentation (such as proof of identity) as soon as possible.
- If the ROP is used by mistake, or for the wrong date, contact CCare staff (see Troubleshooting and Technical Assistance for contact information) to reset the ROP.

**Updating eligibility for clients during the reasonable opportunity period**

The 45-day period gives CCare applicants a reasonable opportunity to obtain citizenship documentation. When that documentation becomes available, the client’s record in the eligibility database must be updated. If an Oregon Birth Record Request has been submitted on behalf of a client or if citizenship was verified through the electronic match with the Social Security Administration, the record will be updated automatically if a match is found.

Take the following steps to update the client’s record when you receive physical copies of citizenship documents either from the client or from state staff as the result of an out-of-state birth certificate request:

1. On the Search for a Client screen, search by CCare number or other field(s) to find the client’s record. Click the Client info link to the left of the client’s name to go to the Client Information screen.
2. Once at the Client Information screen, do not change the enrollment date unless the reasonable opportunity period has already expired. If the ROP has expired, the client will need to complete a new Enrollment Form and all information from that form, including enrollment date and citizenship documentation, should be updated in the system.
3. Record what type of citizenship and/or identity documentation was provided in the appropriate Tier 1-4 and Proof of ID tabs. Enter your clinic number in the location field of any tab in which you enter data.
4. Once all information has been entered, click on the Save Client Info button at the bottom of the screen. If the documents provided satisfy the proof of citizenship and identity requirements, the system will generate a “citizenship has been verified” message and a full year of eligibility for the client. The start date of the eligibility year should be the same as the start date of the client’s reasonable opportunity period.

5. Record the updated information (citizenship and/or identity documentation provided and eligibility dates) on the back of the client’s physical CCare Enrollment Form.

**Renewing eligibility for an existing client**

1. On the Search for a Client screen, search by CCare number or other field(s) to find the client’s record. Click the Client info link to the left of the client’s name to go to the Client Information screen.

2. Once at the Client Information screen, enter the new enrollment date – it must match the date on the client’s signed paper Enrollment Form. It is not necessary to re-enroll an existing CCare client before the year’s eligibility has expired. This applies even if the client is new to your clinic.

3. Update any other information that has changed since the client was last enrolled: income, insurance status, city of residence, etc. Ensure that the client’s citizenship and identity documentation is entered, unless the ROP will be used.

4. When all the information has been updated, click on the Save Client Info button at the bottom of the screen to save the record. If the information meets CCare eligibility requirements, the system will generate updated eligibility dates for the client.

**Reviewing eligibility for clients auto-enrolled from OHP post-partum**

1. On the Search for a Client screen, search by client name to find the client’s record. Click the Client info link to the left of the client’s name to go to the Client Information screen.

2. Review the Client Information screen to ensure that all information is correct. Be sure to ask the client to verbally confirm if they have private health insurance other than OHP, request special confidentiality, and/or have been sterilized for more than 6 months.
Update these fields based on the client’s response. There is no need to record citizenship and/or identity documentation for clients who have been auto-enrolled from OHP.

3. When all the information has been updated, click on the Save Client Info button at the bottom of the screen to save the record.

**Updating client information without changing eligibility**

Follow the steps below for situations in which a client’s record needs to be updated without changing the eligibility dates:

1. On the Search for a Client screen, search by CCare number or other field(s) to find the client’s record. Click the Client info link to the left of the client’s name to access the Client Information screen.
2. Make whatever changes are needed in the record but do not change the enrollment date.
3. When all the information has been entered, save the record by clicking on the Save Client Info button at the bottom of the screen. The new information will be saved but the client’s eligibility dates will not change.

**Submitting an Oregon Birth Record Request**

There are two methods for submitting a birth record request for Oregon-born residents.

To submit a Birth Record Request for an existing client (i.e. client who already has a record in the database, even if the eligibility period has expired):

1. On the Search for a Client screen, search by CCare number or other field(s) to find the client’s record. Click the Client info link to the left of the client’s name to access the Client Information screen.
2. Go to the Birth Record Request tab at the bottom of the screen. Fill out the fields on that tab using information from the Oregon Birth Information Form (C. Exhibit 5), making sure to spell things correctly. Client’s last name at birth is especially important.
3. Once everything has been entered, save the record. The Birth Record Request will automatically be added to a list to be downloaded by state staff.
To submit an Advanced Birth Record Request for a first-time CCare applicant before the client’s first appointment:

1. First, search the database to see if the client already has a record. Search a few times, using different fields on the Search for a Client screen, to make sure the client doesn’t already have a record.

2. Once it has been determined that the client isn’t already in the database, click on the Advanced Birth Record Request tab to be taken to the birth record request form.

3. Fill out as many of the fields as you have information for, making sure to spell things correctly. Client’s last name at birth is especially important.

4. Once everything has been entered, click on the Submit the Birth Record Request button. The request will automatically be added to a list to be downloaded by state staff.

The client will be issued a CCare number but will not be granted any eligibility. Further information regarding Oregon Birth Records Requests can be found later in this document.

Residents born out-of-state

To request birth certificates for CCare clients born in states outside of Oregon who cannot be verified through the electronic Social Security Administration match process, please follow the steps outlined in Section C under “CCare Eligibility Assistance.”
Oregon CCare eligibility database announcements

After logging on to the CCare eligibility database, the following screen will open:

![CCare Eligibility Database Announcements](image)

This page will be updated with announcements on an as-needed basis. From here, other screens may be accessed by placing the cursor over the different tabs on horizontal menu bar at the top of the page:
Find a Client screen

Searching

Even if a client has never been to your clinic before, search for the client in the database before adding a new record, as the client may have been served previously at a different CCare clinic.

To search, move the cursor over the Clients tab on the upper left-hand side of the page to activate the drop down menu and click on Search for a Client. Enter information in one or more of the search fields and click Find a Client; only the first 100 matches will be returned.

Tips for searching include:

- To determine whether a client is in the database or not, search a few different times using different fields (e.g. last name, SSN, date of birth) to prevent adding a duplicate record.
- Search using just one piece of information (except First Name) or a combination of fields (e.g. Last Name and Date of Birth).
- Most fields will allow partial data. For example, you can search by Last Name and the first three letters of the First Name.
- If the client’s CCare number is already known, search using that; it is the quickest way to locate the record.
Searching by SSN is also quick. However, SSNs were not required for teens before November 2006, so SSN may be missing or incorrect in some clients’ records.

**Search Results**

**No result:** If the search does not return any possible matches, this message will appear:

At this point, 1) try searching again; 2) click the **Add a Client** button to create a new record; or 3) click the **Advanced Birth Record Request** tab to request that the state attempt to find an Oregon birth record for a client who is not ready to be enrolled.

**Single result:** If there is a single, exact match for the search, all the fields on the **Find a Client** screen will be filled in from the client record and you will see a message about citizenship verification:
Check to make sure that the record displayed is the correct one for the client. This screen can be used to check a client’s eligibility dates or find a client’s CCare number. If the client’s record needs to be updated or reviewed in detail, click on the Client Info hyperlink near the top of the screen.

**Multiple results:** If there are several records that match the search criteria entered, the following screen will appear (please note that client names and Social Security numbers have been blocked on the screen capture for confidentiality purposes):
At this point, there are two options:

1. Choose **New Search** to return to the Search for a Client screen and enter additional search information; or

2. If you see the client you are searching for and need to update her record or review it in detail, click on the **Client info** link to the left of the CCare number to go to the Client Information screen. If the client is not listed, choose **New Search** to try again. Finally, if this screen gives you all the information you need (a client’s CCare number, for example, or a client’s eligibility dates), log out of the database entirely by clicking on the **Exit** button.

If the search turns up more than one record for the same client, please notify CCare staff (see Troubleshooting and Technical Assistance for contact information). Some duplicate records are to be expected because CCare eligibility was site-specific before November 2006. Let CCare staff know which CCare numbers are involved and which record has the correct or most recent information. They will inactivate the other record(s).
Advanced Birth Record Request

The Advanced Birth Record Request allows database users to request Oregon birth record look-ups for first-time CCare applicants in advance of their enrollment date. It should only be used for clients who do not already have a record in the database. (If the database does contain a record for the client, use the Birth Record Request tab on the Client Information screen to request an Oregon birth record look-up, even if the client’s eligibility has expired.) The Advanced Birth Record Request screen can be accessed from the menu row on the top of the screen by clicking on the Advanced Birth Record Request tab.

![Advanced Birth Record Request Form](image)

Entering data on this screen does NOT establish CCare eligibility. Use this form only to ask the state to search for an Oregon birth certificate for a client who does not already have a record in the CCare Eligibility Database. Even if an Oregon birth certificate is found, you will still have to enter other information (proof of identity, SSN, etc.) on the Client Info screen before the potential client can be enrolled in CCare.

Fields marked with an asterisk are mandatory. Others are optional but will increase the likelihood of a match being found. Please note that mother’s last name refers to her maiden name. Matches are run on the first and third Tuesday of each month and results are uploaded shortly thereafter. If a match is found, a database record will be created for the applicant with “electronic match” already marked under Tier 2.

At this time, the Advanced Birth Record Request screen is available for clients born in Oregon only. To request birth certificates on behalf of potential CCare clients born in other states, please visit the Family Planning website. [Click here](url) for instructions and materials.

### Potential Client’s Current Information

- **Last name***: [Field]
- **First name***: [Field]
- **M.I.**: [Field]
- **Date of birth***: [Field]
- **SSN***: [Field]
- **Client’s sex***: [Radio buttons: Female, Male]
- **County***: [Field]
- **City***: [Field]
- **Client’s birth***: [Field]
- **Last name***: [Field]
- **First name***: [Field]
- **M.I.**: [Field]
- **Client’s birth***: [Field]
- **Client’s mother***: [Field]
- **Client’s father***: [Field]

---

Submit the Birth Record Request
Potential Client’s Current Information

**Last Name, First Name, MI:** These fields (apart from middle initial) are mandatory. Enter the full legal name.

**Date of birth:** Enter the client’s date of birth; this is also a mandatory field.

**SSN:** Enter the Social Security number - it must be a valid number belonging to the client. Requiring SSN on this screen helps ensure that duplicate records are not added to the database.

**Sex:** Indicate the client’s sex.

**State of birth:** This field is pre-set to Oregon since state staff have electronic access only to Oregon Birth Certificate files at this time.

**County:** It’s not necessary to write “county” after the county name (e.g. Jackson County) but please make sure to spell the county correctly and do not abbreviate it (e.g. Mult.).

**City:** This field is optional.

**Client’s name:** These fields are mandatory and are very important field since many CCare clients now have a different last name than they did at birth.

**Mother’s name:** Enter the mother’s maiden name if known.

**Father’s name:** Enter the father’s full name if known.

Fields marked with an asterisk are mandatory; others are optional but will increase the likelihood of a match being found. Matches will be run, and the results uploaded to the database, on the first and third Tuesday. (State staff will also send out an email to notify database users of the results of each match run.) If a match is found, the client’s database record will updated with
“Electronic Match – Vital Records” checked off under Tier 2 on the Client Information screen. If a match is not found, nothing in the record will change and the client will need to produce corrected birth record information or other documentation to be eligible for CCare. Please note that even if a match is found, proof of identity is still required to verify citizenship completely.

**Client Information screen**

The Client Information screen contains client details including name, income, SSN, citizenship, and eligibility status. Fields will be blank when starting a record for a new client but will already contain some data for existing clients.
This is what the **Client Information** screen looks like for an existing client:

![Client Information Screen](image)

**Current Status fields**

The information contained in the gray box at the top of the screen provides useful data about the client’s eligibility status and history. Review this portion of the screen to assess for current eligibility and to locate historical data.
**CCare number:** The CCare number is the unique identifier for CCare clients statewide. If the record is for an existing client, this field will already be filled in. If adding a new client to the database, a CCare number will automatically be generated when the record is saved with valid eligibility information.

**Eligibility dates:** These are the client’s current eligibility dates. If adding a new client, these fields will be blank at first. Records for existing clients may show old eligibility dates from as far back as 2003. If a client’s eligibility dates seem to reflect an odd or unconventional date range, the client may have been suspended or disenrolled because of an invalid SSN or income or because the client had OHP coverage. If so, click on the client’s eligibility history (function described below) to obtain more information. Eligibility dates are based on the client’s enrollment date (see below) and will be updated if you save a record with a new enrollment date.

**Last Update:** This field will show the date on which the record was last updated in the database.

**From Project/Clinic:** These fields will show which project (agency) and clinic last made changes to the record. Projects and clinics will be identified by their Ahlers numbers. See Appendix A for a current listing of CCare providers and their project and clinic numbers.

**Client most recently enrolled at:** This field will indicate the project and clinic that last enrolled the client. Until the client has been re-enrolled at least once since implementation of the new eligibility database (November 2009), this field will be populated with Unknowns.

**Client previously enrolled at:** This field will indicate the project and clinic that previously enrolled the client. Until the client has been re-enrolled at least twice since implementation of the new eligibility database (November 2009), this field will be populated with Unknowns.

**Client’s eligibility history:** When this field is clicked, a new screen will open detailing a variety of possible events made to a client’s eligibility record. Types of events recorded in this eligibility history include when a client has been added, enrolled/re-enrolled, suspended,
disenrolled, citizenship verified, inactivated, modified or ROP reset. This screen will also include information about when the record was updated, at which project and clinic, and by whom. An example of the eligibility history screen is shown here:

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Project</th>
<th>Clinic</th>
<th>User</th>
<th>CCare Number</th>
<th>Last Name</th>
<th>First Name</th>
<th>Type of Event</th>
<th>Elig From</th>
<th>Elig To</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/23/2012 11:47:02 AM</td>
<td>8388</td>
<td>8388</td>
<td>AHLERTEST</td>
<td>3007997</td>
<td>FAKE</td>
<td>CLIENT</td>
<td>Modified</td>
<td>04/22/2012</td>
<td>06/06/2012</td>
</tr>
<tr>
<td>4/23/2012 11:47:02 AM</td>
<td>8888</td>
<td>8888</td>
<td>AHLERTEST</td>
<td>3807997</td>
<td>FAKE</td>
<td>CLIENT</td>
<td>Citizenship verified</td>
<td>04/22/2012</td>
<td>04/22/2013</td>
</tr>
<tr>
<td>4/23/2012 11:46:33 AM</td>
<td>8388</td>
<td>8388</td>
<td>AHLERTEST</td>
<td>3007997</td>
<td>FAKE</td>
<td>CLIENT</td>
<td>Enrolled/Re-enrolled</td>
<td>04/22/2012</td>
<td>06/06/2012</td>
</tr>
<tr>
<td>4/23/2012 11:46:19 AM</td>
<td>8888</td>
<td>8888</td>
<td>AHLERTEST</td>
<td>3807997</td>
<td>FAKE</td>
<td>CLIENT</td>
<td>One-time exception  reset</td>
<td>04/23/2012</td>
<td>06/07/2012</td>
</tr>
</tbody>
</table>

**Client Data fields**

<table>
<thead>
<tr>
<th>Enrollment Date</th>
<th>Last Annual Exam</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/08/2012</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Birth</th>
<th>SSN</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/08/1989</td>
<td>542-12-3456</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M.I.</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAKE</td>
<td>CLIENT</td>
<td>M</td>
<td>Portland</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Monthly Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$3000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Private Health Insurance Other than OHP</th>
<th>Special Confidentiality</th>
<th>Lawful Permanent Resident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes or No</td>
<td>Yes or No</td>
<td>Yes or No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sterilized for more than 6 months</th>
<th>Refugee/Asylee (Clinic has photocopy of documentation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes or No</td>
<td>Yes or No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supply-only Encounter: Established family planning patient within your agency OR Established CCare client at another agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes or No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Client heard about program from: (select all that apply)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hold &quot;Ctrl&quot; &amp; click list to select multiples</td>
</tr>
<tr>
<td>Friend or family</td>
</tr>
<tr>
<td>Add on bus, light rail or bus shelter</td>
</tr>
<tr>
<td>Billboard</td>
</tr>
<tr>
<td>Movie theatre</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If other, please list:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citizenship has been verified</td>
</tr>
</tbody>
</table>

**Enrollment Date**: This is the date on which the client was most recently enrolled into CCare. If adding a new client, the field will default to the current date but can be changed.

- There is no need to change this date if the client doesn’t need to be enrolled or re-enrolled. If just entering some updated information (e.g. a new last name or corrected SSN), leave the enrollment date as is.
If enrolling or re-enrolling a client, the enrollment date entered in the database should match the date on the client’s paper CCare Enrollment Form (Box 19). Remember, however, that CCare enrollment is statewide. You can serve a CCare client who is new to your clinic without having the client fill out an Enrollment Form, as long as the database indicates the client is currently eligible. Use whatever eligibility dates are shown in the CCare eligibility database (not in your clinic-specific software) to determine when a client needs to be re-enrolled.

If updating citizenship verification information for a client who is within the reasonable opportunity period, don’t change the enrollment date. Simply enter the citizenship and identity documentation and re-save the record. The client will be given a year of eligibility, starting from the date the reasonable opportunity period began. However, if the reasonable opportunity period has expired, the client must complete a new Enrollment Form and the date that Enrollment Form was signed should be entered as the enrollment date on this screen.

You will not be able to enroll a client for a future date.

**Last Annual Exam:** This field shows when the client last had an annual exam and cannot be updated by clinic staff. Ahlers updates this field monthly after CCare claims are paid. CCare will only pay for one annual exam per client per year, so use the information in this field to help determine when to schedule the clients’ next annual. For CCare payment, an annual exam must occur 11 months plus one day after her last annual exam. For example, if a client’s last annual exam was on March 22, 2012, then the earliest possible date for her next annual exam would be February 23, 2013.

**Date of Birth:** Enter the client’s date of birth, from Box 16 on the paper CCare Enrollment Form. The system will not accept records for clients less than 10 or more than 75 years old.

**SSN:** Enter the client’s Social Security number (Box 17 on the paper CCare Enrollment Form). This must be a valid SSN belonging to the client. If you get the message that her “Social Security number already exists” once you try to save the record, it means that there is already a record in the database with the SSN. First, confirm that the SSN has been entered correctly. Then, go back
to the Search for a Client screen and do a search using just that SSN. Look closely at the record that comes up (go to the Client Info screen if necessary) to make sure that the client doesn't already have a record in the database. If there really are two different people claiming the same SSN—one already in the database and the one you are trying to add—please call state CCare staff (see Troubleshooting & Technical Assistance for contact information). They will try to determine to which person the SSN actually belongs.

**Last Name, First Name, Middle Initial:** Enter the client’s full, legal name in these fields (Boxes 2-4 on the paper CCare Enrollment Form). Using the full name helps prevent duplicate records in the database (e.g. one for Katherine Jones and another for Katie Jones).

**Live in Oregon:** This field defaults to “yes,” since Oregon residency is a requirement for CCare eligibility.

**City:** Enter (or select from the drop-down menu) the city where the client currently lives (Box 6 on the paper CCare Enrollment Form). Having this information in the database will help users distinguish between similar-looking records on the Client Browse screen.

**Household Size:** Enter the household size from Box 14 on the paper CCare Enrollment Form.

**Monthly Income:** Enter the total monthly income from Box 15 of the paper CCare Enrollment Form.

**Private Health Insurance other than OHP:** This field corresponds to Box 13a on the paper CCare Enrollment Form. For additional guidance about how insurance coverage relates to CCare billing, please contact CCare staff or see Section C of the Reproductive Health Program Manual.

**Special Confidentiality:** If the client indicated a need for special confidentiality, click on “yes” for this field. Special confidentiality should only be requested when the client indicates that sharing information about the family planning visit might result in physical or emotional
harm. This option does not apply just to teens, nor is it to be used for all teens. Clients can request special confidentiality regardless of insurance coverage.

**Sterilized for more than 6 months?:** Enter the client’s response from Box 8 on the paper CCare Enrollment Form. This field is defaults to “no,” since being fertile is a requirement for CCare eligibility.

**U.S. Citizen, Lawful Permanent Resident, and Refugee/Asylee Status:** These fields should reflect the client’s answers in Boxes 9, 10, and 11 of the paper CCare Enrollment Form. Clients must be either U.S. citizens, Lawful Permanent Residents who have lived in the U.S. for more than 5 years, or documented Refugees/Asylees in order to be eligible for CCare.

- The fields for U.S. citizen, Lawful Permanent Resident, and Refugee/Asylee are mutually exclusive fields. The system will not save a record if more than one field is marked “yes.”
- Unless the ROP is used, clients who declare themselves to be U.S. citizens must have proof of their citizenship on record in order to be enrolled or re-enrolled. “On record” means that you do not have to ask to see the documentation if it has already been recorded in the database. This is essential because, according to federal law, clients may only be asked to produce proof of citizenship once. It is also not necessary to collect documentation in order to serve a client with current eligibility.
- Lawful Permanent Residents do not need to show proof of citizenship or identity at the time of the application.
- The fields for U.S. citizen and Lawful Permanent Resident must both be marked “no” if the client is a Refugee/Asylee. Clients who declare Refugee/Asylee status must provide acceptable documentation as proof. A copy of the documentation must be kept at the enrolling clinic site.

**Supply only Encounter:** Click this button if one of the following scenarios applies: 1) the client is newly enrolling in CCare but has had at least one face-to-face family planning visit with a clinician at your agency in the last two years or 2) the client is new to your agency but has been enrolled in CCare and established on a birth control method at another agency within the last
year. Clicking this button will allow your agency to submit a claim for a supply-only pick-up encounter to CCare before submitting a claim for an actual visit.

**One-time exception/reasonable opportunity period:** Click this button to use the ROP for CCare applicants who claim U.S. citizenship but who do not have proof of citizenship immediately available. Using this exception will give clients a 45-day reasonable opportunity period during which they may receive CCare services while obtaining documentation of their citizenship. If this button does not appear on the screen, it means that the client has already used the ROP/one-time exception in the past and may not enroll in CCare until citizenship is fully documented.

**Client heard about program from:** Select the responses (multiple responses are allowed) from Box 1 regarding the way(s) in which the client heard about CCare. If the client wrote an “Other” response on the Enrollment Form, enter this information in the text box provided. This is a required field. If the client did not answer this question on the Enrollment Form, mark “None Checked” in the eligibility database.

**Citizenship & identity documentation fields**

The bottom part of the Client Info screen has several tabs to record which particular citizenship and identity documents the client provided.

![Citizenship & identity documentation fields](image)

All the documents that the Centers for Medicare and Medicaid Services (CMS) consider to be acceptable proof of citizenship are listed by Tier. Identity documents are listed under the Proof of Identity tab. If the client presents a Tier 1 document, proof of identity is not required. If a Tier 2, 3, or 4 document is used to establish U.S. citizenship, then proof of identity is required and must
be recorded in the database. CMS has instructed states to minimize use of Tier 3 and 4 documents as proof of citizenship, so try to collect documents from Tier 1 or 2 if possible. Documents must be originals or agency-certified copies. Clients may not submit their own photocopies of documents; the originals must be copied by clinic staff.

**Tiers 1-4:** To record what type of citizenship documentation a client has provided:

1. Use the CCare Citizenship and Identity Document Checklist, available as Exhibit 3 in Section C, to identify which Tier the document belongs to;
2. Click on that tab to display the document list;
3. Click the relevant check box for the document;
4. Enter the 4- or 5-digit Ahlers clinic number in the Location field. This information will allow CCare staff to locate the photocopies of a client’s citizenship and identity documents in case CMS asks for them during an audit.

Remember to make a legible photocopy of whatever documentation is provided and file it in the client’s chart. The other tabs look like this:

**Tier 2**

Please note that the second field in Tier 2, “Electronic Match – Vital Records” and the last field in Tier 2, “Electronic Match – SSA” can only be used by CCare staff and will be checked only *after* an electronic match has been found. If an Oregon birth record request has been made for a client and the “Electronic Match” check box still is not marked even after the state runs a birth record match, then the client was not found in either the Oregon Birth Certificate file or through the electronic match with the Social Security Administration. In this event, ask the client to complete an out of state birth certificate request or provide proof of citizenship.
Tier 3

Proof of Identity: Use this tab to record what kind of identity proof the client has provided. (This is not required for clients who established citizenship with a Tier 1 document.) Apart from an affidavit, the last option on this tab, the document used as proof of identity must include a photo or physical description.

Enter the 4- or 5-digit Ahlers clinic number in the Location field. This information will allow CCare staff to locate the photocopies of a client’s citizenship and identity documents in case CMS asks for them during an audit.
Secondary Proof of Identity: If the client has established citizenship with a Tier 2 or Tier 3 document, the client may use a combination of three of the following documents as proof of identity:

- Employer ID card
- Accredited high school or college diploma
- Marriage Certificate
- Divorce Decree
- Property title or deed

Clinic where the photocopy of the original document is kept (please enter your Ahlers clinic number): 

Oregon Birth Record Request: The Birth Record Request tab allows you to enter information that CCare staff can use to search electronically for a client’s Oregon birth certificate. Use this tab to make birth record requests on behalf of existing clients or new clients using the one-time exception only; if requesting a birth record search for a new client in advance of the client’s first appointment, use the Advanced Birth Record Request screen described earlier. Note, however, that simply requesting a search does not constitute proof of citizenship, nor does it guarantee that a match for the client will be found.
When filling out the Birth Record Request:

- Provide as much information as possible. The client’s last name at birth, date of birth, and county of birth are most important but parents’ names are also useful.
- Make sure to spell everything correctly.
- You do not need to write “county” after the county name (e.g. Jackson County) but do not abbreviate it (e.g. Mult.).

Using the information in this tab, CCare staff will conduct matches with Oregon Vital Statistics files on the first and third Tuesday of each month. Ahlers will update the record of any client for whom a match is found by marking the “Electronic match – Vital Records” option under Tier 2. Even in these cases, however, a proof of ID is still required to complete citizenship verification. And in cases where a birth record match is found, go back to the client’s paper CCare Enrollment Form to record the match and the client’s updated eligibility dates.

**Clients auto-enrolled from OHP post-partum**

Each month, CCare staff will automatically upload enrollment information into the CCare eligibility database for post-partum women losing OHP coverage. CCare staff will send newly enrolled clients notice of their enrollment via mail informing them of their coverage, including clinic locations by region. Clients auto-enrolled into CCare will be conferred a full year’s worth of eligibility when their enrollment information is uploaded into the CCare eligibility database. Their citizenship will be automatically verified during the upload, unless the client was previously enrolled and citizenship had been verified. Clients who have been auto-enrolled do not need to complete a CCare Enrollment Form when they first visit the clinic.

Use the Search for a Client screen to search by client name to find the client’s record when the client first visits the clinic. Click the Client info link to the left of the client’s name to go to the Client Information screen. Review the Client Information screen to ensure that all information is correct. Be sure to ask the client to verbally confirm if they have private health insurance other than OHP, request special confidentiality, and/or have been sterilized for more than 6 months.
Update these fields based on the client’s response. There is no need to record citizenship and/or identity documentation for clients who have been auto-enrolled from OHP. When all the information has been updated, click on the Save Client Info button at the bottom of the screen to save the record.

**Eligibility suspensions and terminations**

Each month, CCare staff verifies client eligibility by performing Social Security number (SSN) and income verification checks. If a client is found to be over the income threshold for eligibility or the reported SSN cannot be verified, CCare staff will suspend the client’s eligibility dates. An error message located in the gray box at the top of the Client Info screen will explain why the client’s eligibility dates were suspended. Any claims submitted to CCare with dates of service after the suspension date will be rejected.
If a client’s record is suspended because of an income discrepancy, contact the client for more information. If the client is able to provide an adequate explanation regarding his or her income, then contact CCare staff to remove the eligibility suspension.

If a client’s record is suspended because of an invalid SSN, contact the client to obtain the correct SSN or obtain proof that the SSN provided is, in fact, valid. If a different SSN is provided, simply enter the corrected SSN into the appropriate field in the eligibility database and save the record; this will remove the eligibility suspension. Otherwise, contact CCare staff and let them know that you have obtained proof of SSN validity and staff will lift the suspension.

If neither income nor SSN can be verified within 45-days of the date of suspension, CCare staff will terminate client eligibility.

An error message located in the gray box at the top of the Client Info screen will explain why the client’s eligibility dates were terminated. Any claims submitted to CCare after the date of the termination date will be rejected. Clients whose eligibility has been terminated will need to complete a new Enrollment Form in order to enroll in CCare again.

**Saving and exiting**

Once all information has been entered and/or updated, click the Save Client Info button at the bottom of the screen. Eligibility and data quality edits will be applied at this point. If the record passes those edits, the database will save the record and, if needed, assign a CCare number and updated eligibility dates. If enrolling or re-enrolling a client, or updating citizenship
documentation for a client who used the reasonable opportunity period, remember to note the CCare number and eligibility dates on the paper CCare Enrollment Form (Boxes 36-38).

Below is a list of eligibility criteria that will be applied when a record is saved and the error message that will appear if each criterion is not met.

<table>
<thead>
<tr>
<th>Eligibility Criterion</th>
<th>Error Message(s) if criterion is unmet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon residency</td>
<td>Client must reside in Oregon</td>
</tr>
<tr>
<td>Income at or below 250% FPL</td>
<td>Income is greater than 250% of poverty level</td>
</tr>
</tbody>
</table>
| U.S. citizenship or Asylee/Refugee or LPR status | ▪ Coding U.S. Citizen as Yes and Lawful Permanent Resident as Yes is invalid  
▪ Coding U.S. Citizen as No and Asylee/Refugee as No is invalid  
▪ Coding U.S. Citizen as No and Lawful Permanent Resident as No is invalid |
| Proof of U.S. citizenship | ▪ Clients cannot be enrolled or re-enrolled without citizenship and identity documentation unless the ROP is used  
▪ Tier information was coded, but no clinic number entered |
| Fertile (not sterilized for longer than 6 months) | Sterilized individuals are not eligible for CCare |
| Age between 10 and 75 | ▪ Patient’s age is greater than 75  
▪ Patient’s age is less than 10 |
| Valid SSN | ▪ Social Security number is a repetitive number  
▪ Social Security number is missing  
▪ Invalid Social Security number  
▪ Social Security number already exists |

To exit the database entirely, click the Exit System hyperlink as shown below:
Ahlers & Associates and CCare staff are the two main sources of technical support for the CCare Eligibility Database. In general, you should contact state staff first for database problems and questions. If necessary, CCare staff will refer you to staff at Ahlers for additional assistance. A more complete list of issues is below, along with the appropriate contact.

**Contact state CCare staff if:**

(971) 673-0355

Please refer to Appendix B for detailed contact information.

- Find duplicate records for the same client
- Find more than one client claiming the same SSN
- Used the ROP in error or with the wrong Enrollment Date
- Have questions about citizenship documentation or other eligibility requirements
- The client’s eligibility was suspended or terminated because of invalid SSN or income
- The database does not react as expected or an unexplained encounter is encountered.

**Contact Ahlers & Associates if:**

Ahlers & Associates Customer Support

Phone: 800-888-1836 ext.140

E-mail: customerservice@ahlerssoftware.com

- Unable to logon to the database
- The database is running slowly