On the Horizon

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"The influence of our agency is found in its people: clients, staff, partners and volunteers."

The Business Side of Life
Influence through Life Lessons…

The people who influence you are the people who believe in you. -Henry Drummond

Dear Oregon,

The influence of our agency is found in its people: clients, staff, partners and volunteers. While we are a geographically extended community that serves the entire state of Oregon, we strive to never lose sight of the individual.

We recognize that you're sorting out what's important, such as balancing family obligations, health concerns and of course, human services, which partially entails entering information into multiple systems. We understand this can be tedious. Each day we are all learning life skills and lessons that shape how we do business.

Over the past couple months, we've been engaged in workshops with Oracle, (software vendor), allowing the Modernization Team, along with policy units and field representatives, to focus on the beginning steps of the project, such as drafting and finalizing pre-screening questions to gather information from clients and also gathering requirements to help determine eligibility for staff. While we work on the long term details, we're eager to gain field insight.

As you continue to aid Oregonians in becoming self sufficient, the Modernization Business Transition Team is beginning to gather your thoughts for the future of technology.

In the near future, we will be making visits to areas across the state to participate in "listening sessions". The purpose of these sessions is to learn your hopes and fears around the vision of Modernization, and to help ease any unsettling thoughts. We encourage you to express your concerns, excitements and opinions, as we will be sharing your comments with leadership.

Take CAPI for instance; by implementing this software, we have all learned valuable lessons to share with leadership. One being, the Modernization Team has been able to gain insight on how we can become more efficient technically, by taking a hands-on approach to learn workflow and improve training. Secondly, direct service (field) staff have been screening applications, scheduling appointments and determining eligibility online for over a year now. Using CAPI as a stepping stone and training tool in preparation for the future will ease the next transition.

By influencing each other in the steps we take to Modernize DHS, using past experiences and current practices, we can plan for a better future.

Stay tuned for the next newsletter, we will be in touch with more details soon. If you would like to read more about what's happening in Modernization now, click here.

CAPI NARRATION SKILL CHALLENGE

Strengthening Knowledge in 15 Minutes

Fall 2011

The Modernization Program has a website to provide you with project updates, training material and helpful hints. It is now time to test your knowledge to see how well you know your stuff. All of the questions are True or False questions.

Score	T or F	Question	Points
		1. The expectations for narration are different in CAPI when compared to the expectations for paper applications.	10
		2. One of the big differences between the Online Application and paper applications is that the Online Application requires the client to submit a complete application after they continue past the filing page.	10
		3. Workers must narrate twice, once in CAPI and once in TRACS.	10
		4. You must narrate the DOR, filing date and appointment date in CAPI.	10
		5. You must always narrate the SSN in CAPI.	10
		6. If you use the Verify/Pend feature in CAPI you will not need to narrate that information.	10
		7. Targeted Reviewers have certain items that need to be narrated for every case.	10
		8. CAPI narratives can be very short if you are using all of the features.	10
		9. CAPI is the final product to be implemented by Modernization.	10
		10. In the new Eligibility Automation system the need for a story type narrative will not be necessary.	10
	← Your Score	Total Score →	100

See page 5 for answer key

More Tools for You!

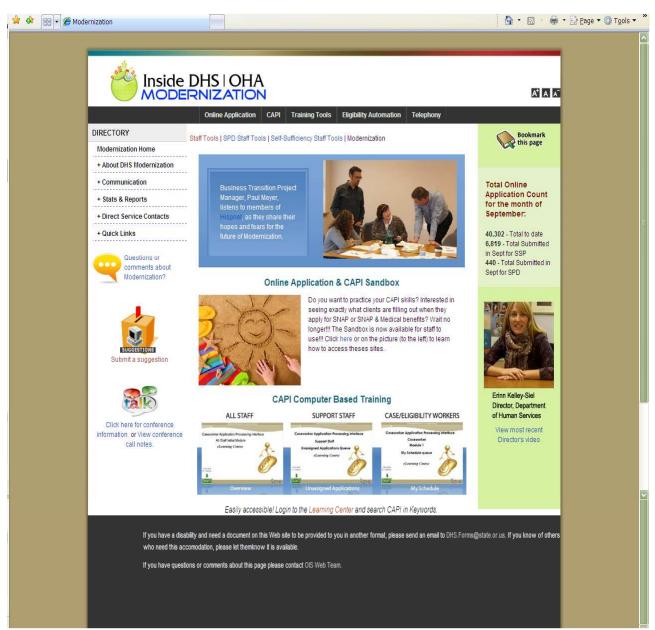## CHECK OUT OUR NEW AND IMPROVED WEBSITE!

More Information.
Less Confusion.
Better Understanding.

www.dhs.state.or.us/modernization/

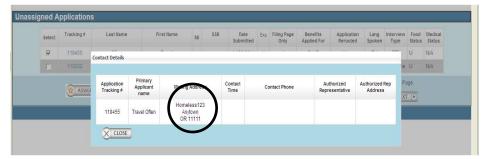If you would like more information, please email the DHS Modernization Program at SSMPROG@dhs.state.or.us.

CAPI Helpful Hints

Frequently Asked Questions

Support Staff

Question: What should branches do with SNAP applications that come in without a valid address?

Answer: When an application comes into a branch with an invalid address (i.e. *homeless in Anytown, OR*), the branch should deny the application for invalid address. The branch does not need to send the client a notice in this case, nor is it necessary to send an appointment notice through general delivery to the client before denial. This is a change from the policy unit, as they had originally advised staff to send a notice. SNAP Policy does not view this as a valid application because there is not an address. This is a denial in the CAPI system so the app can be removed from the queues, but it should not be processed as a denial on the system. Even though these applications do not need a notice, there still needs to be a denial action in CAPI to remove the application from the queue.

Caseworkers

Question: I'm trying to verify information in CAPI, but the VERIFY button isn't enabled.

Answer: Type the details of what you are verifying in the free-form text box to the left. Once you move your mouse out of the box, the button will be enabled.

For more frequently asked questions, <u>click here.</u>

More Helpful Hints

Fall Spotlight
Spruce Up Your CAPI Skills…

Currently, there are 9 Computer Based Trainings (CBTs) available for CAPI in the Learning Center. These courses are about 10 to 15 minutes long and have been updated to show the changes that have been made over the past several months. In addition to updates, new courses have been added to better demonstrate how to use specific tools.

Spruce up your skills and become a CAPI expert by signing into the Learning Center! Click on 'Courses & Registration' and find 'Keywords'. Type CAPI into the text box and then click enter. The search will bring up a list of the following CAPI courses:

UPDATED CAPI Courses:
- CAPI Site Administration
- CAPI Caseworker My Schedule Queue
- CAPI Caseworker View and Edit
- CAPI Caseworker Income Calculator

NEW CAPI Courses:
- All Staff Module 1
- All Staff Module 2
- Support Staff Assigned Applications
- Support Staff Unassigned Applications Queue
- Support Staff Missed Appointments Queue

CAPI Narration Challenge Answer Key

1. *False* – *The narration guideline expectations for CAPI are the same as the expectations for paper applications.*
2. *True* – *In order for a client to submit an Online Application they must complete all required fields on the application. This does not mean that the information is correct, just that the information is on the application.*
3. *False* – *You only have to narrate once. Using the CAPI narrative will allow you to copy the narrative from CAPI to TRACS.*
4. *False* – *This information is already found in CAPI so there is no need to duplicate this information in the narration.*
5. *False* – *If the Client entered their SSN into the Online Application it will appear under the Household Composition tab and will not need to be narrated as this is a duplication of something already in the record. If it does not appear the worker will be required to enter this information in the SSN field on this tab.*
6. *True* – *By entering information and using the Pend/Verify feature this information will appear in your narration at the end of the CAPI process.*
7. *False* – *The Targeted Reviewers have been trained to follow the same narration guidelines that the workers were trained to use. There may be cases where the narrative did not clarify a questionable item which will cause an error but these are on a case to case basis.*
8. *True* – *Because the application is complete and there are features in CAPI that automatically narrate into the system your narrative in CAPI can be very short.*
9. *False* – *CAPI is being used as a bridge to the Eligibility Automation System that is in development at this time. This will give the state to assess the changes to the way we do our work.*
10. *True* – *The Eligibility Modernization System will not have a story style narrative with it. You will enter the data needed in the fields and possibly some statements to verify or clarify the situation for the family.*

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More Information on Modernization:

If you have any questions, comments or suggestions regarding this newsletter or Modernization in general, please email SSM.Program@state.or.us.

Don't forget to checkout our Modernization website!
http://www.dhs.state.or.us/modernization/
It include updates, training material, past newsletters and quick links to the Online Application & CAPI!!!