# On the Horizon

*"Much like you, we are springing forward in Modernization."*

## The Business Side of Life
### Spring Has Sprung

**Dear Oregon,**

*"The first day of spring is one thing, and the first spring day is another. The difference between them is sometimes as great as a month." --Henry Van Dyke*

**In case some of you may have forgotten, the trend of the month is spring! Daylight Savings' "Spring Forward" and the beginning of the spring season, for some Spring Break and for others, the warmth of the spring sun! Much like you, we are springing forward in Modernization.**

**Some of our most recent developments in the Online Application & CAPI are shown in Release 2.6. You may have noticed the change of look in CAPI as a user or read about these changes in our release notes. One major addition is the inclusion of Medical, as an option for clients to apply through the Online Application. Clients can select a checkbox to apply for Medical, although the Online Application does not include questions specific to the Medical Programs.**

**Upon submission of an Online Application, staff can screen application type by reviewing the "Benefits Applied for" row in CAPI, located at the top of an open application. This will show a checkbox for each program that can be or has been applied for. At this time, clients can apply for SNAP only or SNAP and Medical. Clients cannot apply for Medical only through the Online Application; however, we have included a link to the login page for Medical only applications (7210W) to be sent to OHP for processing.**



**As a caseworker, you can use the information gathered from SNAP questions and verbal questions during the interview to make the appropriate Medical Program determination. Our team is also working on a tool for staff to use in processing Medical via CAPI to make the change as easy and efficient as possible.**

**For more updates in Modernization, please read below.**

# Modernization Update
## Project Overview

**Online Application & CAPI**

- Over 8,500 Online Applications have been submitted by clients and have been or will be reviewed in CAPI by field staff.
- Weekly Conference Calls have been scheduled for staff that have questions pertaining to the Online Application or CAPI. Meetings take place on Wednesdays from 10 to 11 AM.
- As mentioned above, Release 2.6 was successfully deployed on March 10. Release 2.7 is scheduled to be launched on April 21!

**Eligibility Automation**

- Market research continues to narrow in on the best solution for DHS/OHA. The Health Insurance Exchange (HIX) and Modernization teams will work closely together on the purchase of software that will be used by both projects.
- The OHA has recently been granted $48 million from the Department of Health and Human Services to provide Oregonians with access to health benefits through an online health insurance exchange.

**Telephony Assessment**

- Completed 10 site visits in the past couple months to gather information regarding current intake processes and telephony usage. Many ideas were gathered from the field regarding how telephony can possibly help them.
- Suggestions are encouraged through the Telephony Field Feedback/Suggestions form on the Modernization website. Please let us know what your thoughts are.

**Modernize Mainframe Systems**

- In order to support Eligibility Automation, we are working with CAF and SPD system experts to analyze and map existing legacy systems and their interfaces to other systems.
- This information will help us determine whether to either re-use, upgrade or retire these systems as part of the Eligibility Automation.

# Tools for You!

## CAPI SKILL CHALLENGE
### Strengthening Knowledge in 15 Minutes

### Missed Appointment Queue

CAPI is a new product that caseworkers are now using. 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. Only Support staff can send a CAPI application to the Missed Appointment Queue. | 10 |
| | | 2. CAPI will send the DHS 411 (NOMI). | 10 |
| | | 3. The Missed Appointment Queue is a queue listed under the Application Routing tab. | 10 |
| | | 4. A CAPI application must have been assigned an appointment date and time to be sent to the Missed Appointment Queue. | 10 |
| | | 5. Selecting an application(s) and clicking on the Missed Appointment button in the Missed Appointment Queue will date stamp the app in MA Sent column. | 10 |
| | | 6. A CAPI application will remain in the Missed Appointment Queue forever. | 10 |
| | | 7. One way to remove an application(s) from the Missed Appointment Queue is to select the application and click the Denial button. | 10 |
| | | 8. Once an application has been removed from your queues it cannot be retrieved. | 10 |
| | | 9. Support staff can reassign cases from the Missed Appointments Queue. | 10 |
| | | 10. You cannot transfer a case from the Missed Appointments Queue into a worker's queue. | 10 |
| ← | | **Your Score    Total Score** → | 100 |

***See page 7 for answer key***

# Training Spotlight

## CAPI Computer Based Training
### March Spotlight

With the advent of much higher workloads and fewer staff in the branches to do the work, we have had to become innovative in how we deliver training to staff. There are currently five CBTs (Computer Based Trainings) available for CAPI in the Learning Center. For a quick and easy training, sign into the Learning Center and click on courses and registration. There is a section on the screen labeled Keywords, enter CAPI into the text box, then click enter. The search will bring up a list of the following CAPI courses:

- One CBT for Site Administration
- One CBT for Support Staff
  - Unassigned Applications
- Three CBTs for Caseworkers
  - My Schedule
  - View & Edit
  - CAPI Calculator

For more information on this training, please contact Scott Ciullo via email at SCIULLO@dhs.state.or.us.



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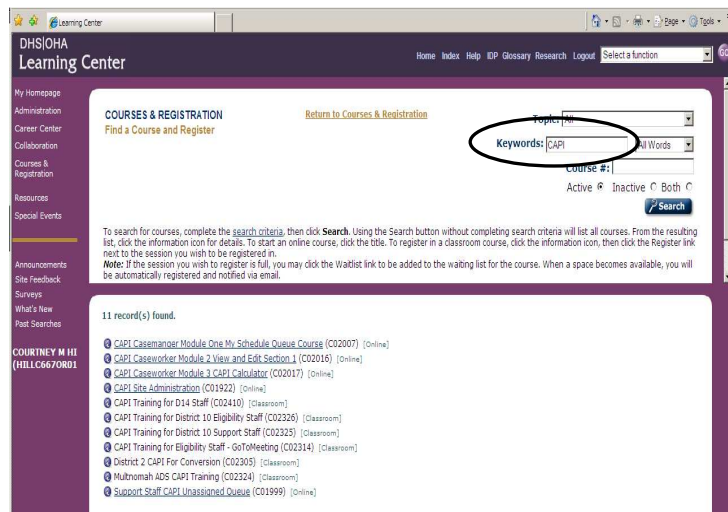
## Addition to the Official SNAP Recert Notice

**Starting April 15th, there will be a new addition to the annual redetermination notice!**

English speaking SNAP clients will see the Online Application web address.
This option will be in addition to the normal information clients see.
This means that your branch will be getting more applications in through CAPI.

More Online Applications via CAPI means:
• Shorter lines in the lobby • Fewer lost applications • Less filing • The ability to instantly transfer applications

*If you are from one of the 18 branches that are participating in the EDMS mail out project, this will not affect you.* Any questions? Please feel free to email SSM.Program@state.or.us.

# CAPI Helpful Hints

## "I have signed into CAPI and received the error message: "User is not assigned with the selected Branch." What do I do?
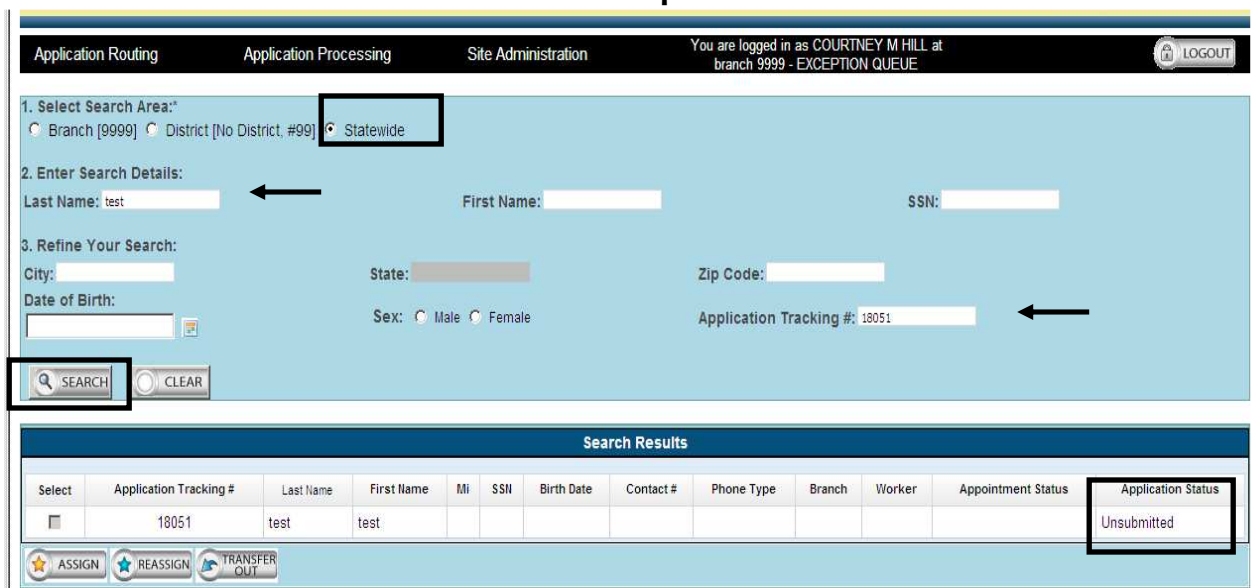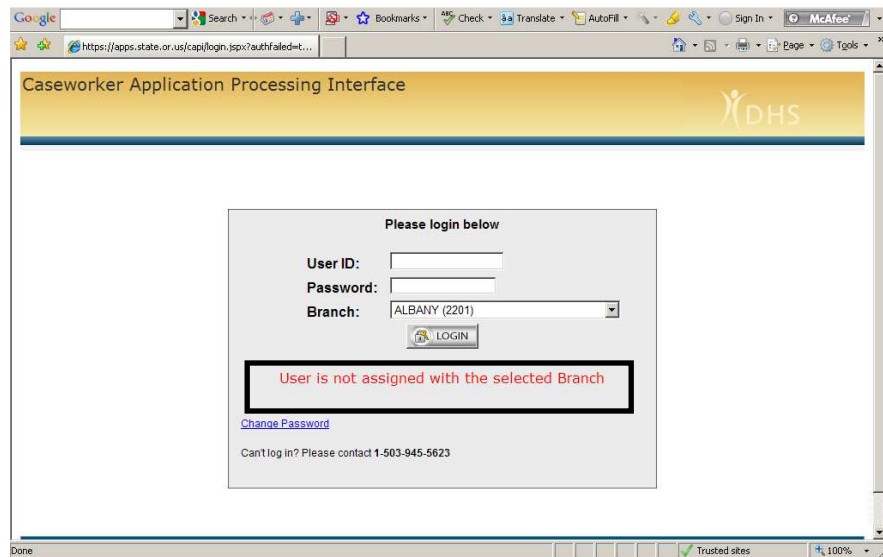


**Troubleshooting:** "User is not assigned with the selected Branch" error
**Solution:** Contact your CAPI Site Admin to assign rights/roles and then you will be able to login.
*Who's my Site Admin? Checkout the Modernization website for your local CAPI Contacts.*
[http://www.dhs.state.or.us/modernization/](http://www.dhs.state.or.us/modernization/)

## What should I do if a client says they submitted an application and I can't find it in my branch queue?



**Troubleshooting:** Is this application missing or was it routed to another branch queue?
**Solution:** Statewide Search! The statewide search will give you the location of the application and indicate the application status. Tip: if the application status reads "unsubmitted", advise the client to login to their user account to submit the application.

# CAPI & Citrix—What's the Deal?!?

There has been some confusion around the CAPI/Citrix relationship, especially now that more and more staff require CAPI access and have had to contact the Service Desk for help with obtaining a Citrix password. See below for a list of Frequently Asked Questions.

## What is Citrix?
Citrix is technically a secure web internet portal; however, it may be easier to think of it as just a vehicle – it will get you where you need to go. Citrix maintains the CAPI login information, which means that you will need to obtain a Citrix password in order to access CAPI. You will then use your Citrix username (your 'OR' or 'P' number) and password to login to CAPI.

## How do I get a Citrix account?
Everyone who has a 'P' or 'OR' number has a Citrix 'account'. If you have never logged in to the actual Citrix website or checked the OHP Reservation list (this site also uses Citrix login information), then you will most likely need to call or e-mail the Service Desk to request a password. They will give you a temporary password, which you should change immediately on the Citrix website (they will provide a link).

## Do I login to Citrix to access CAPI?
No, unless you work remotely from home or another location, you will probably only visit the actual Citrix website when you first receive your password from the Service Desk and then later when you are prompted by CAPI to change your password.

## How can I find the Citrix website when my CAPI password expires?
There is a link to Citrix on the CAPI login page which you can click when CAPI notifies you that your password has expired.
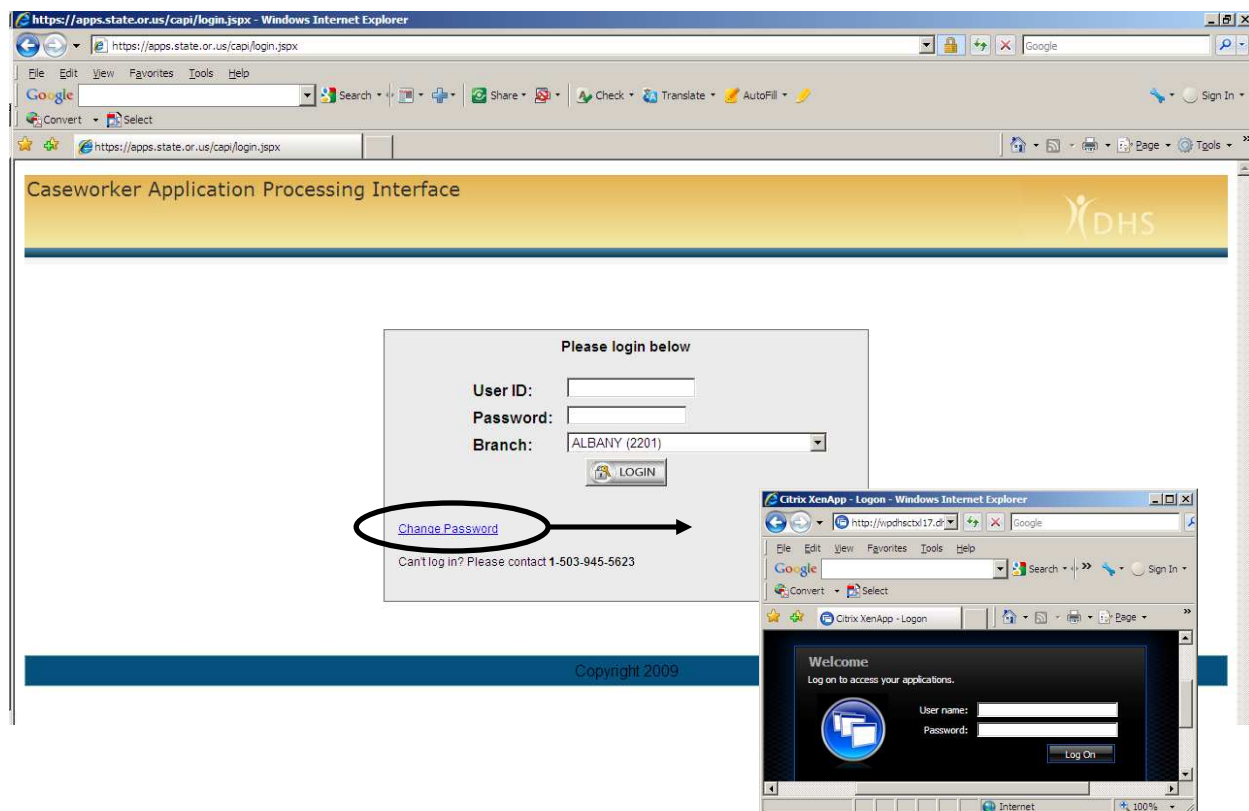
# More Helpful Hints

## Streamlining the CAPI Intake Process

**Have you been wondering what functions in CAPI
are encouraged and which are optional?**

### ENCOURAGED:
- Editing Fields – As you go through the sections and tabs you have the ability to change information in the fields as you uncover new information from the clients.
- Narrative – At the bottom of each tab is a narrative section. The idea is to fill out each narrative section as you progress through the tabs. In the end, you'll have a nice narrative that you can copy and paste into TRACS.
- Income Calculator – This is a handy tool that creates an "auto-narrative" of the full calculation and places it into the narrative tab.
- The "Pend" Button – While you go through the sections and tabs, verifying information, there are several places where you can pend for information. By using this feature you'll not only create an auto-narration that is placed into the Narrative tab, but you'll also automatically indicate in the Eligibility tab, which items you've pended for quick reference later.

### OPTIONAL:
- "Verify" and "Exclude" Buttons – You have the option to utilize the "Verify" and "Exclude" buttons (that have the capability to auto-narrate into the Narrative tab), or you can easily verify and exclude by adding information into the narrative section.
- "Reviewed" Radio Button – This button is used to turn tabs GREEN or YELLOW as an indicator to you as to whether or not you have reviewed that tab, however, it's not necessary to make all TABS green.

## CAPI Calculator Skill Challenge Answer Key

1. **False** - *Sending an application to the Missed Appointments Queue is a function of both Support Staff and Case Workers.*
2. **False –** *CAPI will not send any notices including the DHS 411 (Notice of Missed Appointment)*
3. **True –** *The Application Routing tab contains the Unassigned Applications, Scheduled Appointments, and Missed Appointments Queues.*
4. **True –** *You can not have a missed appointment if you do not assign and appointment to the application.*
5. **True –** *This will give persons who view this list a date and time that the DHS 411 was sent. Remember to do this step <u>after</u> you send the DHS 411.*
6. **False –** *The application will remain in the queue until it is reassigned or denied. Your branch should have a process in place to remove applications from the Missed Appointments Queue on a regular basis.*
7. **True –S**electing an application(s) and clicking on the Denial button will send the application(s) to the archive to be stored.*
8. **False –** *Applications that leave your queues are put into the Archives for just as long as paper applications. They can be retrieved from the Archives by using the Statewide Search button.*
9. **True –** *Reassigning applications is a function of the queues that Support staff use.*
10. **False -** *You can transfer a case in CAPI directly from the Missed Appointments Queue.*

# Self Sufficiency Modernization Representation

## Executive Steering Committee:

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Jeanette Burket
Jerry Waybrant
John Koreski
Kathryn Naugle
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Monte Burke
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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!!!