

Robert Trachtenberg,
Hearings and Rules Administrator

Authorized Signature

Number: SS-AR-12-013

Issue Date: 10/15/2012

Topic: Other

Due Date: 10/15/2012

Subject: Requirement to apply restoration of benefits to overpayment balance prior to the client

Applies to (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Children, Adults and Families | <input type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers | <input checked="" type="checkbox"/> Other (please specify): all SS and APD staff who do eligibility work |

Action Required: Remind staff to use the [DHS 362](#) form for restoration of benefits, and to apply restoration of benefits first to any outstanding overpayment balance before issuing to client.

Reason for Action: The *Notice of Restoration of Benefits* ([DHS 362](#)) has been revised to include “cash” benefits. This form serves two purposes. It is used as notice to the client, and if there is an overpayment balance, it provides notice to the Overpayment Recovery Unit (ORU) to apply restored benefits to an existing overpayment balance.

When there is an overpayment, the restored benefits must first be used to repay an existing overpayment before the balance can be issued to the household. Workers are required to check for any unpaid overpayment balance in the program for which the restoration is being considered before issuing or restoring retroactive benefits to the client. Issue to the client only the portion of the retroactive benefits that exceed the overpayment balance in the same program.

Before issuing or restoring retroactive benefits:

- Check WEBM Find and UCMS or FCAS, whichever is applicable, for any overpayment balance*;
- If no outstanding overpayment balance is found, complete the [DHS 362](#). Send original to client, copy for the file, and issue full amount due to client;

- Narrate the action taken.

When an overpayment balance is discovered:

- Using FSM ([IB-b.3](#)), calculate the amount to be issued. After calculating, subtract the amount of the outstanding overpayment balance from the amount to be issued;
- Complete the [DHS 362](#). Send original to client, send copy to ORU and copy for the file;
- Issue only the amount of retroactive benefits that exceed the outstanding overpayment balance;
- Narrate the action taken.

Submit the form to ORU using one of the following methods:

- Electronically, by clicking the "Submit" button at the top of the form (preferred method);
- Scan and email to overpayment.recovery@state.or.us;
- Fax to 503-373-7303.

*For questions about identifying the correct overpayment balance, please call the ORU at 503-373-7772, or toll free at: 800-273-0548.

OARs [461-165-0210](#), [461-180-0130](#) and [461-195-0551](#)
 FSM chapters [GP-c.9](#), [IB-b.1](#), [SNAP-g.15](#) and [SNAP-g.16](#)

Field/Stakeholder review: Yes No

If yes, reviewed by: OPAR; SNAP and TANF policy units; Field Services

If you have any questions about this action request, contact:

Contact(s):	Linda Weight, Field Services – 503-945-6952 ORU – 503-373-7772 or toll free – 800-273-0548
- Email:	Linda.weight@state.or.us overpayment.recovery@state.or.us