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Applies to (check all that apply):

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|---|---|
| <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 checked="" type="checkbox"/> Children, Adults and Families | <input type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Other (please specify): |

Message: The following is the Final Narrative Guide Q&A compiled from all of the trainings presented across the state. Please note: this Q&A contains some clarifications from previous Q&As that were distributed. Some of the answers have changed since the initial rollout.

If you have any questions about this information, contact:

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Narrative Guide Q&A

Use of the Narrative Guide

1. Can staff no longer use headings in their narrative?
Workers have the choice whether to write in paragraph form or include the headings such as Situation, HH comp, etc. They are just not to add additional headings which would basically be creating a template.
2. Must staff follow the same order of narration as the order of the headings in the guidelines?
No. The worker needs to include the elements, but may do so in any order.
3. Is it OK to include something in the narration that can be found on the application or screens? For example, I like to include the age of the children in the narrative since I reference it frequently.
The purpose of the narration change is to save staff time. As you gain more experience with the condensed narration, you should become increasingly comfortable with it.
4. Do the narrative guidelines apply to narrating DV eligibility interview?
No. There is no change for DV applications.
5. Why should we narrate DOR and Filing Date and Interview date when they appear on application?
Many branches have decided to narrate DOR and filing date to identify the specific application when multiple applications have been received.
6. Do we need to narrate household composition if no one else lives in the house but the filing group as the filing group and who is receiving benefits is indicated by the coding on the screen?
Yes, you always need to narrate how the filing group was formed.
7. Can workers still make notes on the application? Is it OK for the worker to do this as long as they write in a different color of ink? I often do this during phone interviews. Is this a problem for hearings?
It is OK to make notes on the application, but these should be narrated. If doing a face-to-face interview, have the client update or clarify any information necessary on the application to reduce time needed to narrate later on. For any interview, be sure to narrate information that is not reflected on the application.
8. Do we still have to narrate verbally offering the client alternative formats?
If you indicate it on the top of the application in the box for agency use only, no. Otherwise, yes. This action cannot be verified on a screen or in the case file, so it must be narrated.
9. Can the 852 and TANF 415F applications be narrated together? Currently we have a template in our branch for each. Can the narratives be combined as one?
It is fine to combine into one narrative as long as the separate actions can be identified.
10. Do we have to narrate offering the client the voter registration form?
No. The important issues around voters' registration are offering it to clients in person at cert, recert, and change of address; sending the registrations to the county elections offices; submitting tally cards to Secretary of State's (SOS) office and keeping the signature cards in the office according to the SOS.

11. Many branches have 415Fs in the lobby that clients can pick up and send or turn in. These clients do not get the 3400 or Voter's Registration forms. How can we know they have received them if we do not narrate this?
FNS (Food and Nutrition Service) is aware of our procedures and we don't believe this will be an issue.

FS-Specific

12. I have always heard that certain things like giving the client the 3400 and Cat EI be narrated in the past and am now hearing that it's not necessary. Is this correct? Directives sometimes change.
It was recently decided there is no need to narrate cat el status, unless it is to explain why the client is not categorically eligible. All SSP and SPD branches give out the 3400 at each cert/recert; FSMIS automatically runs the income test.
13. Categorical eligibility can be determined in a number of ways. Sometimes it is because the income is below the 185 percent FPL, but sometimes it can be because everyone is receiving certain programs like Post-TANF. It seems like this is part of our eligibility determination. Does it need to be narrated?
No.
14. For FS, if they are categorically eligible, do we have to say anything about resources?
No.
15. Is it OK to use the abbreviation SEU? How about P&P?
The acronym SEU is universally understood to mean separate filing group, so there is no problem with using it. The problem comes from narrating only "SEU" instead of explaining how the filing group was formed. P&P should be understood by anyone looking at a FS narrative.
16. Do we need to narrate what reporting system we put them in for FS since this information can be found on the screen?
This should be narrated, as part of narrating that reporting requirements were explained to the client and listing which related forms were given.
17. Do we have to narrate the OFFSET exemption if it is based on the age of a child or working full-time as this information can all be found on the screens?
Some exemptions (age of child, receipt of UC) can be easily supported by looking at FSMIS: others (transportation, caring for a disabled person) cannot. We believe it will be easier to narrate all exemptions than to sort out which can stand alone.
18. Do we need to narrate the type of interview, for example FTF for FS, when TRACS requires an entry in drop-down options indicating if by phone, mail, office visit, etc.
You do not have to narrate the type, but if you are not in a waiver branch, you do need to narrate the client hardship reason when doing a phone interview.
19. Do we need to narrate the utility standard given if the information on the application is clear, e.g., if the application states they pay for heat and FUA is on the screen? Could we just narrate "pay for heat separately" and not narrate FUA or not narrate anything if this is clear on the application.
As long as the heat source or utility information is identified on the application and is consistent with answers given in the interview, you do not need to narrate FUA, LUA, TUA or IUA.

20. Do I need to narrate rent amount if it is not being shared with another person and is clearly stated on the application?
Any deduction clearly stated on the application and coded as given in FSMIS with no changes does not need to be narrated. The application does not collect enough information on shared shelter for narration to be omitted. Follow up questions are needed.

21. For SEC for FS, can we just narrate that the client has costs for their business, or do we have to narrate specific costs?
Policy requires that we narrate at least one cost to support a determination of SEC.

Notices

22. Do we need to narrate that we gave clients a form such as the 7294 if a copy is in the file? Do we need to narrate that an 853 or 943 was given if we routinely do this?
Yes. Narrate any form/notice whose issuance date cannot be tracked on LOGI.

23. Do I have to narrate notices sent by LOGI? Do I need to copy and paste the text of the LOGI notices into my narrative? Is it possible to retrieve the text of these LOGI generated notices if required for a hearing?
There is no need to narrate notices sent by LOGI. Please do not copy and paste notice text into TRACS. Forms/notices sent via CM, FS or NOTM can be accessed via the notice retrieval system.

24. When a LOGI notice is retrieved, does the worker-entered text show?
Yes.

25. Not everyone has access to Notice Retrieval (only managers). Why cannot everyone get access to Notice Retrieval?
Access to Notice Retrieval was never intended to be limited. Anyone can get access to Notice Retrieval by contacting the DHS Service Desk.

Narrating Verification

26. Do we need to narrate alien number when verifying noncitizen documents?
This information does not appear on the application or screens and needs to be narrated.

27. Do we need to narrate the verification of SSN if it's shown as verified on W204 or the Person Alias Update Screen?
No. Note: The SSN field on the Person Alias Update field must be V for verified, not A for assumed. Please update this field when verifying.

28. Do we need to narrate the phone number and name of employer when verifying income by phone or can we just say "verified with employer?" What about out-of-state verification?
This information is captured nowhere except TRACS. It is important to narrate phone number and name to validate the verification.

29. We realize we should not list specific Social Security screens when stating how we verified information, but put "per SS records." Can we still narrate per WAGE, ECLM or BBCN?
The only restriction on narrating a screen name used for verification is the SSA screens.

30. Do we have to say child support verified by screens or can we just narrate the amount of Child Support since it can be found on the screens.
We do need to narrate how we verify information. Child support may be verified on SMUX or by other means if it is not going through the Division of Child Support.

Reporting System and Certifications

31. Do we need to narrate certification begin/end dates for any program since this information can be found on the screens?
This needs to be narrated only if not doing so would cause confusion; e.g., when people within the same family are approved for different medical benefits with differing end dates.
32. If we are processing a recertification and there are not any changes, can we just narrate “no changes” on the recertification narrative?
No. Every recertification requires a new determination of eligibility. This suggestion would require anyone looking at TRACS (including you if your client now has a question) to page back looking for the earlier narrative. Also, is that earlier narrative complete and correct? Narrating eligibility decisions is not optional.
33. When not putting an ERDC case into SRS, does the worker need to narrate a reason for not putting the client into SRS?
No.

Narrating Assets

34. What must be narrated in regard to countable income?
The following information related to countable income must always be narrated:
Verification source
Date of payments used
Reason for using selected payment history
Calculation
All of these elements must be narrated even if there is an income worksheet in the file.
35. As far as resources for TANF and MAA and some of the OHP programs, what exactly must be narrated if the information is already on the application and the filing group is clearly under the resource limit?
If there is no question that they are under the resource limit, you do not need to narrate. However, if you have to do any calculations to determine if under resources or gather additional information from the interview, you must narrate this information.

Narrating the Eligibility Decision

36. Once TANF eligibility is determined and the client is determined below the resource limit, do we still have to narrate MAA eligibility?
Yes TANF and MAA eligibility are not identical and must be narrated separately.
37. Do we need to narrate who was found eligible for what program as this information can be found by looking at the screen?
Yes. Getting this information on-line can mean looking at FSMIS, UCMS, CMUP and MMIS. Much easier to narrate than to search multiple systems for an answer.

Deprivation

38. On the 415F, there is an agency box on page 7 for indicating if there is a PWE and a UC disqualification. If we mark these boxes, do we need to narrate the same?

You must support your eligibility decision in the narrative. If you deny a case, the reason for the denial needs to be clear.

39. For “Continued Absence” do you need to list the amount or frequency of visitations in the narrative, e.g., visits less than 4 times or 12 hours a week if it is a absent father that lives out of state or is in prison or not visiting if that information is on the application?

The application does not gather information about contact with the absent parent. You will have to ask additional questions to determine if deprivation exists and need to narrate this information.

Only in a few situations such as when the application clearly states that the absent parent is in prison or lives in a state not adjacent to Oregon, would no further explanation be necessary. Just living in another state doesn't guarantee that no visitation occurs, e.g., an absent parent living in Vancouver, WA and a family living in Portland.