

Office of Self Sufficiency Programs

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Services for Self Sufficiency and Child Welfare

Authorized Signature

Number: SS-IM-12-016
Issue Date: 04/16/2012

Topic: Payment Accuracy and Recovery

Subject: Narrative Guidelines - Clarification On What Must Be Narrated

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 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: Based on audit outcomes, a clarification for the Financial Eligibility section of the Narrative Guidelines is being provided to meet compliance with Federal and State expectations.

The Narrative Guidelines "Financial Eligibility" section currently reads as follows:

Income – earned, unearned, excluded, calculation, pay stubs/verification used, self employment, results of screen checks, if no income how they are meeting basic needs; NC1/NC2 calculations; resources; pursuing assets; good cause; cat el.

It is a requirement that the results of screen checks, as well as what verification was used, be documented in the case narration. Documenting screen checks can be as simple as narrating "all available screens checked – no information found for this case," or "all available screens checked – Weekly Unemployment benefits of XX verified." However, to ensure compliance with the Social Security Administration (SSA), when the verification comes from SSA screens, document "verified via SSA Records" instead of listing the screen names.

Additional clarifications are being added into the Family Services Manual and a policy transmittal will be sent out at that time.

Action Required:

Ensure all narrations from this point forward adequately document the screen check results within the clarification above.

Additional Resource Material:

For additional examples of narrations, see the April 2012 On Target Newsletter when it comes out later this month.

For original Q&As regarding the Narrative Guide:

<http://www.dhs.state.or.us/policy/selfsufficiency/publications/ss-im-09-023.pdf>

For SSA Narration Limitations:

<http://www.dhs.state.or.us/policy/selfsufficiency/publications/ss-im-08-037.pdf>

If you have any questions about this information, contact:

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