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Authorized Signature

Number: SS-IM-12-059

Issue Date: 10/15/2012

Topic: Medical Benefits

Subject: Open OSIPM cases with past due review dates

Applies to (check all that apply):

- | | | | |
|-------------------------------------|-------------------------------|-------------------------------------|--|
| <input type="checkbox"/> | All DHS employees | <input type="checkbox"/> | County Mental Health Directors |
| <input checked="" type="checkbox"/> | Area Agencies on Aging | <input type="checkbox"/> | Health Services |
| <input type="checkbox"/> | Children, Adults and Families | <input checked="" type="checkbox"/> | Seniors and People with Disabilities |
| <input type="checkbox"/> | County DD Program Managers | <input checked="" type="checkbox"/> | Other (please specify): CAF SSP
transmittal group |

Message:

A recent review of open OSIPM cases found several thousand with a past due review date, some as far back as 2001. These cases were open in both SSP and APD branch offices. Due to federal regulations, OSIPM cases are not sent renewal notices and are not automatically ended based on their review date. The expectation is for the agency to review these cases on an annual basis.

Branch 5503 worked a list of all OSIPM cases with a past due review date and redetermined eligibility for the cases held in SSP and OHA offices.

Concerns identified during this review are listed below and apply to OSIPM cases held in both SSP and APD offices:

- Reviews were not completed annually, even when there was a companion SNAP or P2 medical case open that was being reviewed and updated annually;
- OSIPM cases were not closed when a companion case was closed. For example, a client has an open SNAP, P2 and D4 case and reports they have

moved out of state. The SNAP and P2 medical benefits are closed but no action is taken on the OSIPM case;

- Reported address changes are not applied to all cases. For example, a client who is receiving SNAP and OSIPM calls to report an address change; the SNAP case is updated with the new address, but no action is taken on the OSIPM case;
- Notification of death was not applied to all of a client's open cases;
- Payments made while the case was open in error resulted in substantial administrative overpayments.

The findings from these case reviews were shared at the SSP Line Manager Quarterlies meetings, and managers were generally in agreement that a monthly report would be helpful to raise awareness of the need to watch for and review these companion cases when appropriate.

Beginning in November 2012, Branch 5503 and SSP and APD field offices will begin receiving a monthly report showing all OSIPM cases open in their branch with a review date past due or coming due within the next month. In SSP offices, the monthly report will be sent by email from Jeff Tharp. In APD offices, the report will come from Karen Gulliver in APD Central Office. Both reports will come during the first two weeks of each month and will only show OSIPM cases and will be sent in an Excel spreadsheet format. A similar report is available on View Direct, WCM039OR-A.

As a reminder, there are trainings available for staff including, OSIPM/QMB Eligibility for Self-Sufficiency, SPD Eligibility 101 and SPD Eligibility 201. All can be found on the [DHS/OHA Learning Center](#). One suggestion shared by a manager at the SSP Line Manager Quarterlies meeting was to have an HSS4 attend the SPD Eligibility 101 training so there is an office point person for OSIPM and QMB cases.

If you have any questions about this policy, contact:

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