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Authorized Signature

Number: SS-PT-12-030

Issue Date: 12/14/2012

Topic: Other

Transmitting (check the box that best applies):

- New policy
 Policy change
 Policy clarification
 Executive letter
 Administrative Rule
 Manual update
 Other: _____

Applies to (check all that apply):

- All DHS employees
 County DD Program Managers
 Area Agencies on Aging
 County Mental Health Directors
 Aging and People with Disabilities
 Health Services
 Children, Adults and Families
 Other (please specify): Self-Sufficiency

Policy/rule title:	B. Oregon Trail Cards I. Case Files J. Voter Registration		
Policy/rule number(s):		Release no:	
Effective date:	January 1, 2013	Expiration:	
References:	Field Business Procedures Manual		
Web Address:	Field Business Procedures Manual - http://insidextra.dhs.state.or.us/caf/FieldBusinessProcedures/		

Discussion/interpretation: Three chapters of the Field Business Procedure Manual have been revised: [B. Oregon Trail Cards](#); [I. Case Files](#); and, [J. Voter Registration](#).

B. Oregon Trail Cards

The Oregon Trail Card chapter has been revised to provide the following clarification:

#6. Changing Payees – clarifies when an FSMIS head-of-household or CM payee changes, an Oregon Trail card connected to the new EBT case must be issued to the new payee.

#12. Replacing Lost, Stolen or Damaged Cards – clarifies a branch office may cancel an Oregon Trail card in the EB system. The client does not have to call eFunds/FIS for card cancellation.

#13. Destruction of Oregon Trail Cards – provides clarification when the [DHS 248A](#) should be used.

I. Case Files

The Case File chapter now has four sections: Case File Maintenance; Transferring Case Files; Archiving Case Files and Documents; and Retention and Purging.

#1. Case File Maintenance – emphasizes the need to maintain all eligibility related documents in one case file.

#2. Transferring Case Files – reinforces case files and documents must be sent using a traceable method and in the most cost effective manner; scanning and emailing should be considered an option for less than 50 pages; and, case files should be purged by the sending branch prior to transfer.

#3. Archiving Case Files – clarifies the process for open and closed archiving.

#4. Retention and Purging – clarifies when documents may be purged.

J. Voter Registration

This entire chapter has been revised to provide detail and clarification on NVRA agency requirements. Revisions include:

- Chapter formatting, including references to applicable OARs;
- Clarifies that the opportunity to register to vote must be provided with each application, re-certification or change of address form, regardless of whether in-person, through mail/internet or phone.

Implementation/transition instructions: Beginning January 1, 2013, follow and use the revised policies.

Training/communication plan: Manager review of the policy with staff.

Local/branch action required: Follow the revised policies.

Central Office action required: Revise Field Business Procedures Manual policies.
Write and distribute Policy Transmittal.

Field/stakeholder review: Yes No

If yes, reviewed by:

Filing Instructions:

If you have any questions about this policy, contact:

Contact(s):	Tracey L. Miller, Business Integrity Manager		
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