APD Field Services

October 2016

In the Loop

Roseburg weight loss losers!

Thank you all for participating in our office weight loss (percent) challenge! Here are the RESULTS! Top ten losers by percentage of weight lost:

1. Cary with 12.66%
2. Sarah K with 10.19%
3. Jaimie with 8.21%
4. Balam with 6.34%
5. Julie with 6.20%
6. Gina with 6.19%
7. Danielle with 6.16%
8. Kristopher with 4.25%
9. Dena with 2.94%
10. Rachael with 2.55%

Top three losing teams:

1. Weapons of Mass Reduction (Courtney, Sarah K., Cary) 25.30% body weight reduction and a 51 pound loss!
2. Fat Busters (Julie, Kristopher, Gina) 16.64% body weight reduction and a 40 pound loss!
3. No name (Jaimie, Dena, Curtis) 10.29% body weight reduction and 20 pound loss!

Reminder: The calculations are based on percent of body weight lost, not most weight (pounds) lost. However, we posted percent and pounds lost. Thanks to all who participated! Each team that participated were "winners," as we all moved in the right direction toward our goals

CONGRATS to Team "Weapons of Mass Reduction" on winning the $270 dollar prize monies!!

Gina Graham, Roseburg

In this edition:

Supporting APD/AAA field structure by providing efficient, timely, and accurate information through superior customer service.

Right to apply for APD benefits

Just as a reminder to all APD/AAA staff: Encouraging applicants or recipients to withdraw their applications is *not a recommended practice*, even in cases where the individual *appears* to be ineligible based on their statements or initial documentation.

Individuals have the right to apply for any program at any time, and only in rare situations would withdrawing their application be considered appropriate.

Individuals should be encouraged to complete the application process so a timely and appropriate determination can be made. Their right to administrative review or hearing is not supported by encouraging them to withdraw their applications before an official determination.

This practice can be detrimental to them should later information have a bearing on their eligibility for benefits. This practice may also disadvantage individuals who may be limited in their ability to self-advocate or to fully understand the implications of withdrawing their application for benefits.

If field staff have questions or concerns about a specific case, please contact APD policy for guidance.

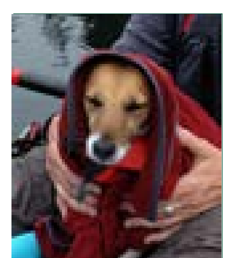
New ROSE (Report of Serious Event) form now available!

Over the past several months, a group of APD Field and Central Office staff have worked to revise the ROSE form, as well as the policy related to when to complete a ROSE form. The new APD 307, *Report of Serious Event* or *ROSE*, form is now available on the DHS Forms Server, and Policy Transmittal APD-PT-16-034 was sent out September 26, 2016.

The ROSE form is designed to alert Central Office staff of ANY serious event that could result in an immediate need for action to ensure safety of consumers. The ROSE also allows DHS Communications and Management to knowledgeably respond to media or other inquiries.

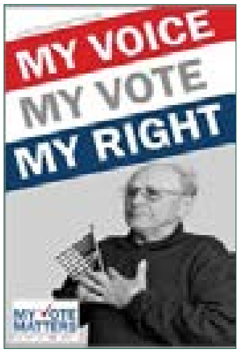
We ask staff read through the policy transmittal and submit a ROSE immediately following any serious event, including (but not limited to):

- Physical assaults;
- Sexual assaults;
- Elopements;
- Physical abuse or neglect which results in hospitalization, serious injury, or death;
- Suicide;
- Threat of violence, or actual violence (including domestic violence);
- Media contact or potential for media contact related to an event.



Maggie - Dena McDonald, North Bend

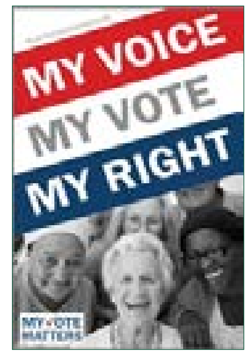
Residents' Rights Month is October 2016



Did you know approximately 35,000 Oregonians live in long-term care settings, including residential care facilities, assisted living facilities, memory care communities, adult foster comes, and nursing homes?

October is National Long-Term Care Residents' Rights Month, a time to acknowledge the contributions and sacrifices many long-term care (LTC) residents have made to better our community and to call attention to the rights of residents in long-term care facilities.

This year's theme, *My Vote Matters,* was selected to call attention to the fact consumers receiving long-term care services and supports retain their voting rights no matter where they live or what type of care they receive. Residents of LTC facilities have experienced many important historica political events. It is important they are given the opportunity to continue to participate in the political process and voting is made accessible to them.



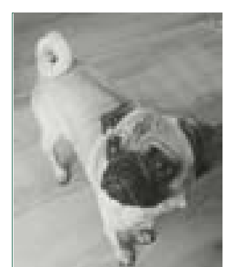
By listening to residents' voices, we honor their lives and experiences, as well as treat them with the dignity and respect they deserve. We hope you will encourage all LTC residents you know to vote and you will assist them in doing so in whatever ways you can.

To learn more about Residents' Rights Month, please visit the Residents' Rights Month 2016: My Vote Matters website.

Computer skills classes in iLearn

The OIS team has uploaded 16 classes into iLearn to help staff improve day-to-day technical skills. Classes include:

- Microsoft Access 2013: beginner and intermediate;
- Word 2013: beginner, intermediate, and advanced;
- Excel 2013: beginner, intermediate, and advanced;
- PowerPoint 2013: beginner and intermediate;
- Outlook 2013: beginner and intermediate;
- OneNote 2013;
- Project 2013;
- SharePoint 2013;
- Skype for Business.



Bella - Lawna Goodwin, North Bend

Classes may be searched in iLearnOregon using keyword: *CustomGuide* or *Microsoft*. These courses range from 30 minutes to 2 hours in length and are available for any DHS|OHA employee to use. OIS will be adding more classes in upcoming months.

Voucher payment changes

Effective November 1, 2016, staff now have seven (7) business days (previously eight (8) business days) to process correctly completed vouchers.

However, if day seven (7) is a Friday, the voucher pay process day *must be on Thursday*. This change will become effective for first pay date in November.

The English version of the HCW Payroll Calendar has been updated to reflect the new pay process dates. The Spanish, Vietnamese, and Russian calendars will be updated and posted as soon as they are translated.

For more information, please review APD-IM-16-098.

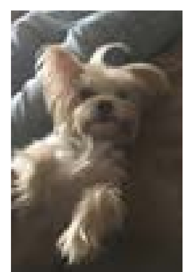
Don't forget!

Consumers cannot be required to provide a copy of their Social Security card as proof of their SSN; requiring those cards specifically violates the program guides and intentions. Wage stubs, award letters, tax forms, and a variety of other items may have their SSN; the W204 screen indicating the SSN is verified can also be used. Review the manuals and use DHS 223, *Proof of Eligibility* form as your references for documentation requirements.

Hearings resources and reminders

The APD Hearings website includes information staff need to navigate the hearings process and help reduce the likelihood of a hearing in the first place. Include on the site is:

- *Hearing Request Protocols and Procedures* document which includes how to make a referral, explanations of terminology, and a guide to the MSC 443, *DHS|OHA Administrative Hearing Request*;
- APD Hearings Referral sheet – **Be sure you are using only the most current version (with EDMS)!****
- Notice language guide;
- Decision notice PowerPoint training;
- Link to the notice retrieval site – this is where staff can view notices sent by the mainframe system; and
- Links to hearings related transmittals.


Kooper - Christine Maciel, Central Office

The iLearn system offers an online, self-paced training for AAA/APD staff related to hearings which guides staff through the hearings process including what to expect, how to prepare and testify, what happens after a hearing, and appeals. Find it by searching for *hearings*. The course is called *DHS – APD – Online Hearing Informational Training*

If there are questions about hearings, contact information is included in the transmittals to reach the hearings representative, manager, and coordinator.

***Staff should delete/recycle all prior versions of the Hearings Referral sheet and use only the March 2016 version which includes EDMS in the checklist!*

Don't forget! Please review [Manual Letter #73] on the APD Staff Tools website for updated rules, procedures, and changes to the manuals; see SS-PT-16-022 and SS-PT-16-024 for a complete list of changes. Update includes changes to the APD Worker Guide, a new Client Maintenance Unit manual, and many others.

Looking for past issues of In the Loop? All newsletters, yearly indexes, and a master index for the current and previous two years are on the APD Field Services web page.

Political campaigning reminder

As the federal election approaches, please remember the State of Oregon guidelines for public employees engaging in political activities while at work: ORS 260.432.

Restrictions include distributing written and electronic materials, fund raising, working on campaign events, or advocating for or against a candidate or measure while *on the job.*

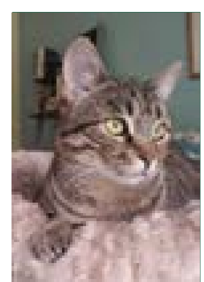
Please take a moment to review the guidelines and contact the Secretary of State Elections Division if you have any questions: 503-986-1518, or www.oregonvotes.gov.

FSAM updates

A Herculean effort has happened over the last few years to update – and make relevant! – the manual, previously known as the SSAM, is now the FSAM: Field Staff Assistance Manual. Link to the FSAM through the APD Staff Tools page or Field Services page.

In the FSAM staff can now find information on:

- Using Outlook including how to ignore those endless reply-all-stop-replying-all email chains and adding a non state person to contacts;
- Financial procedures;
- Fleet vehicle information:
- View Direct (aka RD2) guides;
- Medical card information;
- Purchasing and disposing of office equipment;
- Voter registration manual;
- What to do with original consumer documents;
- Becoming a notary;
- And a lot more!



Flurry - Sharen Yeager, Medford

If you find a broken link or have an idea for something you'd like to have included, send an email to Karen Kaino, (karen.l.kaino@state.or.us) or Janet Morse (janet.e.morse@state.or.us) and we will do our best to get it fixed right away.

Many thanks to Caryn Whatley, Angela Munkers, and the countless other individuals and groups who made the updates possible – and to everyone in the field who alert us to broken links and problem pages. We could not do it without you!

November 2016

Alzheimer's disease month
Long-term care awareness month
National homecare and Hospice month

Nov. 1 - 7: Patient accessibility week
Nov. 6 - 12: Give wildlife a break week
Nov. 12 - 20: Hunger awareness week
Nov. 20 - 26: Fraud awareness week

Nov. 1: National family caregiver day
Nov. 4: Use your common sense day
Nov. 8: Election day
Nov. 11: Veteran's Day - **CLOSED**
Nov. 13: World kindness day
Nov. 17: Great American Smokeout
Nov. 24: Thanksgiving Day - **CLOSED**
Nov. 25: Day after Thanksgiving - **CLOSED**
Nov. 29: Giving Tuesday
Nov. 30: Computer security day

Has EAU called you?

Yes, a branch office or case manager may occasionally be contacted by one of our Estate Administrators. The Estates Administration Unit (EAU) may request a copy of a document such as a mortgage statement or annuity contract.

EAU could have a question about a recipient's contact or bank information as it appears in Oregon Access. In some cases, we may request an archived file, one that is not available in EDMS. We always appreciate the help we receive from our DHS partners.

Thank you in advance for assisting us in the estate recovery process!

Kathleen Rossi, EAU

APD LTC exceptions word search

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N	X	G	M	B	T	V	V	Z	X	H	O	O	T	K	L	V	R	S	G
A	W	S	Z	S	C	A	L	C	U	L	A	T	O	R	N	S	C	Y	G
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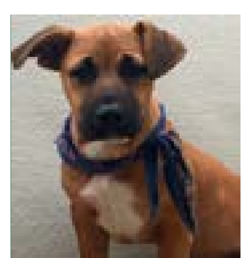
A	S	S	E	S	S	M	E	N	T	K	T	G	A	D	D	O	N	S	C

- Exceptions
- Hourly
- AFH
- Inhome
- Calculator
- Review
- Assessment
- Providers
- Consumers
- Addons



Brutus - Rhetta Harvey, Roseburg

Form updates

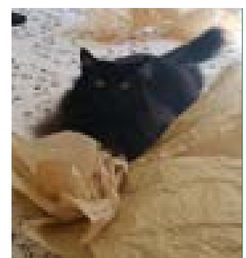
Please delete all copies of the prior versions of these forms from your desktop and archives and use only the current version going forward. All current forms are available on the DHS Forms Server:

- APD 450, *Liability Worksheet for Long Term Care or Home and Community-Based Care*, is updated to match the SNAP utility allowance updates;
- APD 727, *Medicaid Fraud Referral Form*, is updated with correct referral contact information.

CI sheet success!

In 2013 a continuous improvement (CI) sheet was submitted by the Medford Senior Services office. The CI sheet proposed eliminating the mail log, a required step when opening and receipting monies received in the mail. Office Specialist Nathan Peterson suggested the mail log is duplicate work because the receipting process already requires two people to open mail containing cash or checks.

Here's what happened:



Gustav - Karen Kaino, Central Office

- The APD Governance Team voted on the importance of the suggestion based on the five CI sheet criteria. The score was high - #11 out of 80.
- The CI sheet was referred to the Office of Continuous Improvement and assigned to two lean leaders: Michele Parsons in Medford and Kristen Newton in Bend.
- Michele and Kristen observed the mail receipting process in three offices and mapped the processes used in each office. Two offices did not use the mail log and one office did.
- While this was happening, we contacted the DHS Chief Operating Officer and the Controller because the mail log requirement is written in policy: DHS/OHA-040-013 and were told a change could be requested if there were evidence of procedures in place to mitigate risk *without* the mail log.
- We worked with OFS Receipting Manager Beth Brown who reviewed processes and recommended the mail log requirement could be eliminated. Beth also attended a field leadership meeting last summer and stressed the importance of following the current requirement of two people opening and receipting mail containing cash or checks.
- The mapping process conducted by the lean leaders, combined with our history of no significant financial losses, confirmed we have sufficient controls in place and convinced executive leadership to remove the mail log requirement in the most recent version of DHS/OHA-040-013.

Thank you to everyone who participated in this continuous improvement event!

Caryn Whatley, APD Field Services

Medicaid procedure changes

Procedures for the initial Medicaid application, annual redeterminations, acting on changes, and MAGI due process have changed; see APD-PT-16-040 for complete details. The transmittal explains only the November changes.

Effective November 1, 2016 staff are required to follow procedures detailed in the *APD MAGI Manual* linked on the Staff Tools webpage. The APD MAGI manual replaces the previous ACA procedure document.

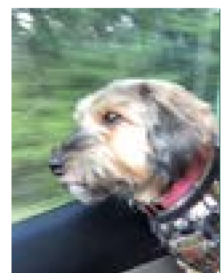
Please review the changes and the Manual in your local offices and send all questions to the Medicaid policy unit.

PACE payment option

APD has added another online payment option - this time for participants of the PACE program. The Program of All-inclusive Care for the Elderly (PACE) currently has about 1,200 participants, and the program is expanding.

Effective November 1, PACE participants will be able to use a debit or credit card to make their monthly liability payments online. EPD program participants were given this option about a year ago and it has been a big success for those consumers.

If you have consumers in PACE or EPD, please encourage them to use the online portal to make their payments. The website is easy to navigate and consumers receive immediate confirmation their payment has been accepted.



Corky Sue - Cindy Pryor, Central Office

A letter is being sent to each PACE participant with a pay-in. It contains all the information needed to make a payment except for their personal debit or credit card information. The url is https://apps.oregon.gov/ECommerce/DHSOHA/EPS/. Check it out!

More NVRA Q&A

Here are more questions and answers about the National Voter Registration Act (NVRA) procedures. If you have a question, contact Karen Kaino by phone (503-569-7034) email (karen.l.kaino@state.or.us) or IM. See FSAM. VIII for the complete NVRA manual, including procedures and examples.

Q: We were told if the consumer states on their 539A or 415F if they wish to register or not that application can replace the declination. Is that true?

A: That is true. As long as the question is marked on a DHS approved form, it doesn't matter which form is used; you do not need to *also* complete the declination form because the question was already answered. You will still need to narrate. FSAM VIII.C.1. *Applications and reporting forms declinations*.

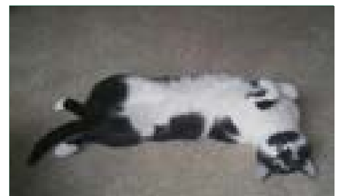
Continued on the next page

Continued from the previous page

Q: The consumer used the wrong registration card, they used SEL 500 which is the one we put in the lobby for non-clients to mail in themselves. Should I go ahead and mail it in like I normally would with the others?

A: Yes, send it in with the 503 forms and make sure there is a completed declination and narration. Although staff cannot hand out, mail out, or direct consumers to use the lobby form, if we receive one, treat it like the agency form and process it normally. *This information will be added to the manual with the next section update.*

Q: A newer staff member forgot to fill out the declination form for several consumers when she first started. Thanks to our narration template, we know for sure she did ask them and what their response is. At this point, should she go ahead and fill out the declinations now, even though it has been several months?



Toby - Alyssa Elting McGuire, Hillsboro

A: Yes. If there is nothing else which can be used as a declination (such as an application or interim change report) then yes, go ahead and do the declination now. The declination is largely for audit purposes so filling it out now – while not ideal – is okay. FSAM VIII.C. *Declinations*

Q: I was in a consumers home for an assessment and by the time I got to the voter registration question, she was tired and no longer able to answer questions. I left a card - was that right?

A: Absolutely - as long as you removed the declination. If a consumer is unable to respond to the question of voter registration, either at all or appropriately, staff may mark the declination as *NO* and narrate *NO*; we do not want to seem to be haranguing a consumer over voter registration. For consumers who are able to respond at times - such as in this case - it is always okay to leave a registration card (SEL 503) with the declination removed. Cards left behind which are not requested are regarded as a *NO* response on the declination and the narration. FSAM VIII. G. *Special situations*.

Q: We are not receiving a notice that our reports are being accepted - what do we do?

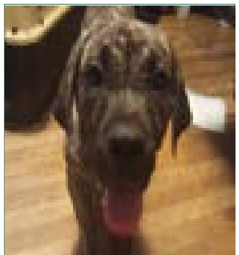
A: There have been several reports of this - here are the most common culprits:

- Sending the report by email. Email reports are no longer accepted and staff must use the online reporting form; FSAM VIII. F. *Local Site Coordinators*
- Out of date form. The reporting form has been updated several times so the bookmark you are using may be invalid - bookmark the Secretary of State page instead to stay up-to-date;
- Incomplete information. The form isn't accepted as incomplete;
- Incorrect information. Check your email address and your agency number.

If none of these apply, contact Karen Kaino and we will figure it out!

ONE in iLearn

To locate training for the ONE system in iLearn:



Phoenix Huga-Muga - Sean Phillips, LaGrande

- Enter *ONE* as a keyword on the first page;
- Mark the *OHA- Health Systems* box on the left side menus under *Course Provider*;
- Enter.

Choose the online training you would like to view by clicking on the title listed.

For more information, please see the APD Training website under *ONE Training Instructions*.

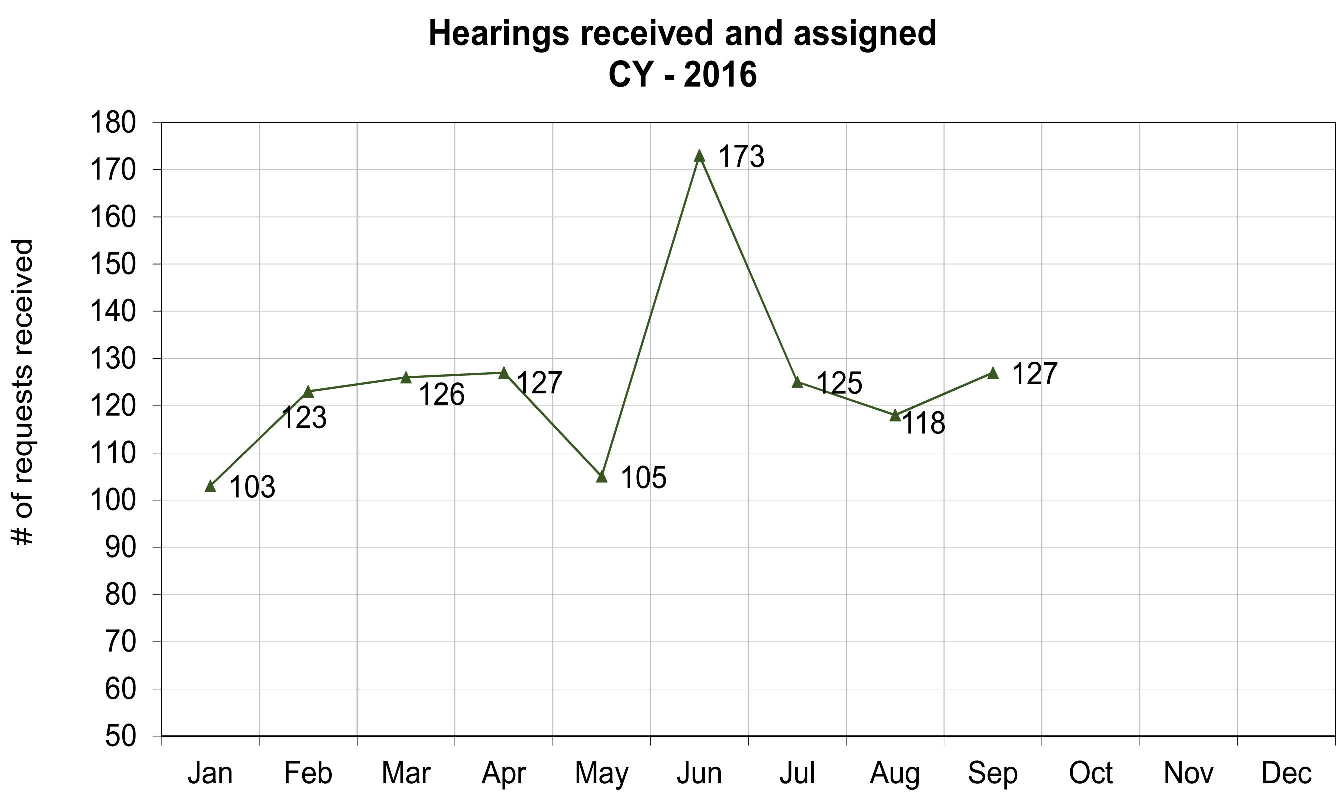
DQ divisor change

As of October 1 2016, the divisor used to calculate the length of disqualification (DQ) for certain long-term-care services due to a disqualifying transfer of assets has increased to $8,425.

When there is a disqualifying transfer of assets, apply the $8,425 divisor to calculate the length of disqualification when the initial month of eligibility is on or after October 1 2016.

For more information about the initial month of eligibility, see OAR 461-001-0000 (35). If you have questions about this change, please contact Bill Brautigam: bill.h.brautigam@state.or.us.

Don't forget! Ask all SNAP applicants to set a filing date as soon as possible when they request SNAP benefits. *A completed application is <u>not</u> needed to set the filing date.* The filing date starts the application process time and is usually the date SNAP benefits start – delays cost consumers benefits! 461-115-0040



A letter from Lean Academy

The Lean Academy was created as a result of a growing need within DHS to build the capacity and staff skill in all levels and locations to implement lean concepts in daily work, empowering everyone with the ability to look at local opportunities for improvement and take initiative with the proper tools to better the work, the environment, and to benefit employees, partners, and most importantly: those we serve. Since its inception, we have experienced first-hand the successes of the program, capitalizing on the energy of locally recognized improvements and locally implemented solutions.

Cohort 2

Please join us for the GRADUATION of the second Cohort on November 16th from 10:00 AM – 12:30 PM in the Human Services Building (HSB) and Rooms 137A-C, (500 Summer St. NE, Salem). All DHS staff and partners are welcome to join in celebration.

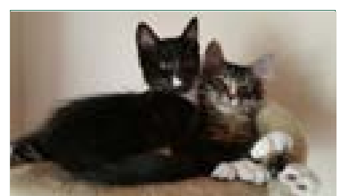
The graduation is set to take place right in the lobby of the HSB and provide an opportunity to view projects from all the Cohort 2 students, from a variety of programs, all over the state!

Witness as the Cohort 2 Graduates become *Local Lean Experts* – using what they've learned as a means to continue their work, locally as resources for improvement projects!

- Lorene Arias
- Charlene Daniels
- Peggy Jensen
- Jeanne Krausse
- Brian Lewis
- Erika Mooney
- Michael Paul
- Tansy Peschel
- Jason Pruett
- Cynthia Quinones
- Lauri Stewart

Cohort 3

Building on the successful first two Cohorts, Cohort 3 is off and running with their projects. Classroom training has been completed and the Cohort members with their Mentors, are working with their local team on their projects, utilizing and practicing the 7-step Problem Solving Process. Graduation is tentatively scheduled for May of 2017. Look for upcoming news on this Cohort and student successes!



Dory and Max - Susan Patanjo, St. Helens

Cohort 4

Cohort 4 is looking to start in February, to add another 12 students to the building roster of Local Lean Experts. Announcements for recruitment will be sent out for applications within the upcoming months!

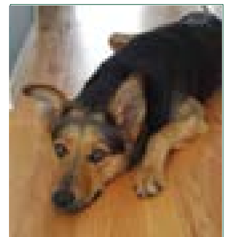
Questions?

Want to learn more about Lean Academy? Have questions about recruitment or ongoing projects? Contact us on our Lean Academy: OCIDirector.LeanAcademy@State.or.us. Or check us out on our intranet site!

SNAP shelter and utilities - tips

Before allowing a SNAP shelter deduction or coding a utility standard, make sure utilities are not included in rent. Try to avoid terms like *shelter* or *utility* and ask in plain English. For example:

- Do you pay for rent or housing costs?
- Do you pay for heating or cooling costs?
  - If so, are those costs separate or included in your rent or housing costs?
- Do you pay for any other utilities separately from your housing costs such as water/ sewer, garbage, electricity, gas, or phone?
  - If the yes, which utilities do you pay separately?



Cleo - Brandi Lemke, Hillsboro

Other things to think about and consider:

- *Does the consumer mail in a check to pay a utility?*
  - A large number of AAA and APD consumers pay bills by check. If they are mailing in a check to cover a utility bill, it's probably not part of the rent.
- *Does the specific bill come in the mail/email?*
  - Consumers who report they receive either an electronic or paper bill each month for a utility cost are more likely to have a separate cost.
- *Does the amount change every month?*
  - If the amount doesn't change, ask why. It could be they have a flat fee agreement with the utility provider, or it could be because the utility is actually assessed as part of the rent or a different arrangement that should be further explored with the consumer.

Staff have reported they feel guilty asking consumers' questions about their housing situation when the consumer is obviously in need, or say there isn't time to ask about shelter costs. However, no one wants to tell a consumer they're losing or getting reduced benefits due to an overpayment we could have prevented.

Also, consider this: How much time will it take to go back into the case, narrate the error, fix the error, narrate the fix, process the overpayment, send the notice, and then explain to a consumer what happened vs. how much time it takes to ask the questions during the interview?

And lastly, don't forget to clearly narrate your conversation with the client to support your eligibility decision.

For additional information on housing and utility costs, please see OAR 461-160-0420 and SNAP-G.23 and G.24.