APD Field Services July 2017

In the Loop

Central Office celebrates Independence Day

APD Central Office celebrated Independence Day with a cookout and potluck on the patio.

The weather was perfect and the turnout was amazing!

Thank you to everyone for your hard work organizing, decorating, and cooking.

We had a great time taking a break and spending time with each other in the gorgeous Oregon summer with great food.

In this edition:

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

Don't forget! If you update a consumer's address in Oregon ACCESS and integrate the case, and the consumer has SNAP, remember to go into the SNAP case on DHR and update the address there as well. Oregon ACCESS and the DHR SNAP case are not able to share information so one more step is needed to make sure SNAP notices are getting to the right address.

Jackson and Omar - Kevin Everidge, Central Office

"Like" Aging & People with Disabilities, Oregon DHS on Facebook to see messages from our Director news, job opportunities, events, and much more!

August 2017

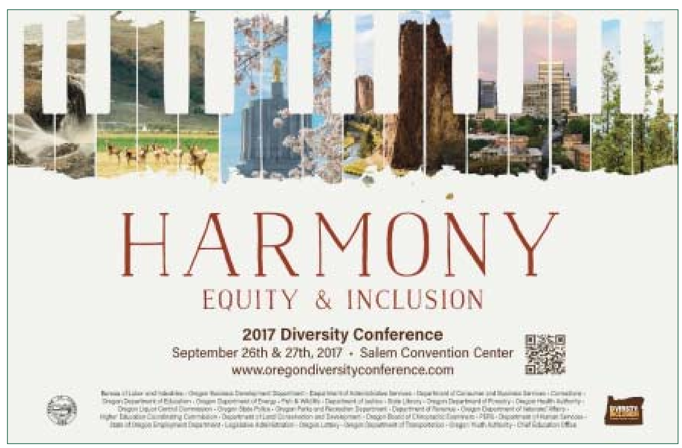
American adventures month
Mutt-i-grees rescue month
Win with civility month
Aug. 5 -21: XXXI Summer Olympics

Aug. 1 - 7: Simplify your life week
Aug. 6 - 12: Fraud awareness week
Aug. 13 - 19: Feed pets of the homeless week
Aug. 21 - 25: Safe at home week

Aug. 1: World lung cancer day
Aug. 4: Social Security day
Aug. 7: Purple Heart day
Aug. 9 -13: Perseid meteor showers
Aug. 14:National relaxation day
Aug. 17: Black cat appreciation day
Aug. 21: Senior citizen's day
Aug. 25: National park service day
Aug. 30: Grief awareness day

Equity and Inclusion 2017 Diversity Conference

September 26 and 27, 2017 will be the next Diversity and Inclusion Conference for state of Oregon employees at the Salem Convention Center, 200 Commercial St., SE in Salem. This year's theme is *Harmony*.



Please see the Diversity Conference website for the workshop list and descriptions. After clicking on the link an ODOT conference page will open; the Conference is working in partnership with ODOT.

If interested, obtain your manager's approval because space is limited so register as soon as possible. DHS will close registration for staff on Monday, July 31, 5:00 p.m. Priority must be given to staff who haves never attended or have not attended in the last four years. Staff may attend and register for either September 26th or 27th. The program is the same each day.

The Salem Convention Center is accessible to people with disabilities. Please contact Oscar Herrera, conference co-chairman, for an accommodation and for other conference questions. If there are questions relating to registration please contact the Christine Maciel, DHS coordinator.

HCBS update:
Case managers gear-up for person-centered consumer education

Case managers across the state have been learning about the next steps in Oregon's Home and Community-Based Services (HCBS) transition plan. The plan was freshly revised after a May 9th announcement from the Centers for Medicare and Medicaid Services (CMS) gave states up to an additional three (3) years to come into compliance with the 2014 regulation.

Oregon will use the extra time to educate consumers about their rights and freedoms under the HCBS rule and identify who each individual would want to make decisions for them if they were no longer able to do so. Oregon will delay the process for obtaining consent to limit individual freedoms and rights, individually-based limitations, until 7/1/18.

The new rules allow those living in residential settings have some of the same choices they had when they were at home. Such as: when to go to bed at night or get up, having a late night snack if desired, or choosing who they live with as a roommate, or who can visit and when.


Simba - Laurel Brandt, North Bend

Consumer education is a critical component to the successful transition to the HCBS rules and philosophy. The education case managers are providing will be tailored to each individual and provided in the manner that will best work for that person. Many will get fact sheets and have conversations with their case manager, while others may have HCBS concepts discussed in their assessment process. This is not intended to be a one-size fits all cookie cutter approach.

Case managers will be advocating for those who may not be experiencing a right which is important to that person. We think it is the right time for case managers to be talking to residential providers. Residential providers have been making plans to comply with the HCBS rules since the Oregon HCBS rules came out in 2016 and must make measurable progress towards compliance. It is hoped this consumer education process creates the right amount of attention to help long-term care providers remove remaining barriers. We want to take Oregon to the next level in helping long-term care consumers access their rights and freedoms.

This is important work and underscores the important role case managers play every day in the lives of people aging and people with disabilities.

Medicaid LTC HCBS Policy

Outlook updates needed

iLearn Oregon is now integrated with the Outlook address book. When you update your manager in Directory Update, it updates in iLearn nightly. Update this field when your manager changes. **Please update the Outlook manager field using Directory Update.**

This must be done in Internet Explorer (you cannot use another browser): see FSAM X.F: Outlook 5: *How to Use Directory Update to enter your manager's name* for detailed instructions and screen prints.

Don't forget! AAA staff can also use the iLearn system to sign up for classes or take classes online. When the Learning Center went away, AAA staff profiles were migrated over. Please check under your name and *My Account* (upper right to make sure your information is all correct - especially your manager's name.

Kudos – Monthly service assessments

With all the work that needs to be done on a daily basis, you all are doing a great job in keeping up with the monthly service reassessments. This is one of the most important things we do, ensuring consumers' continued eligibility and ensuring that we are serving individuals who continue to need our assistance. Statewide, we are close to 100% for timely service reassessments! **Nice job** everyone!

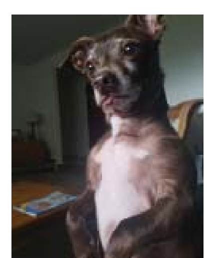
Report period: May 2017

Branch	All valid Assessments	*Monthly reassessed	*Monthly not assessed	% past due	% completed
Statewide	33,482	2,311	93	3.9%	96.1%

**Reporting population –Assessments with a review by date within the month*

Honor roll - 100% timely service reassessments

Branch	Valid assessments	Monthly reassessed	Monthly not assessed	% past due
0111	112	6	0	0.00%
0411	345	27	0	0.00%
0913	120	7	0	0.00%
0914	271	20	0	0.00%
1211	60	2	0	0.00%
1311	52	5	0	0.00%
1611	172	13	0	0.00%
1612	139	14	0	0.00%
2019	233	17	0	0.00%
2111	567	37	0	0.00%
2311	290	18	0	0.00%
2911	207	15	0	0.00%
3011	359	25	0	0.00%
3013	372	22	0	0.00%
3111	220	18	0	0.00%
3112	81	4	0	0.00%
3211	190	9	0	0.00%


Cooper - Jillian Jamieson, Central Office

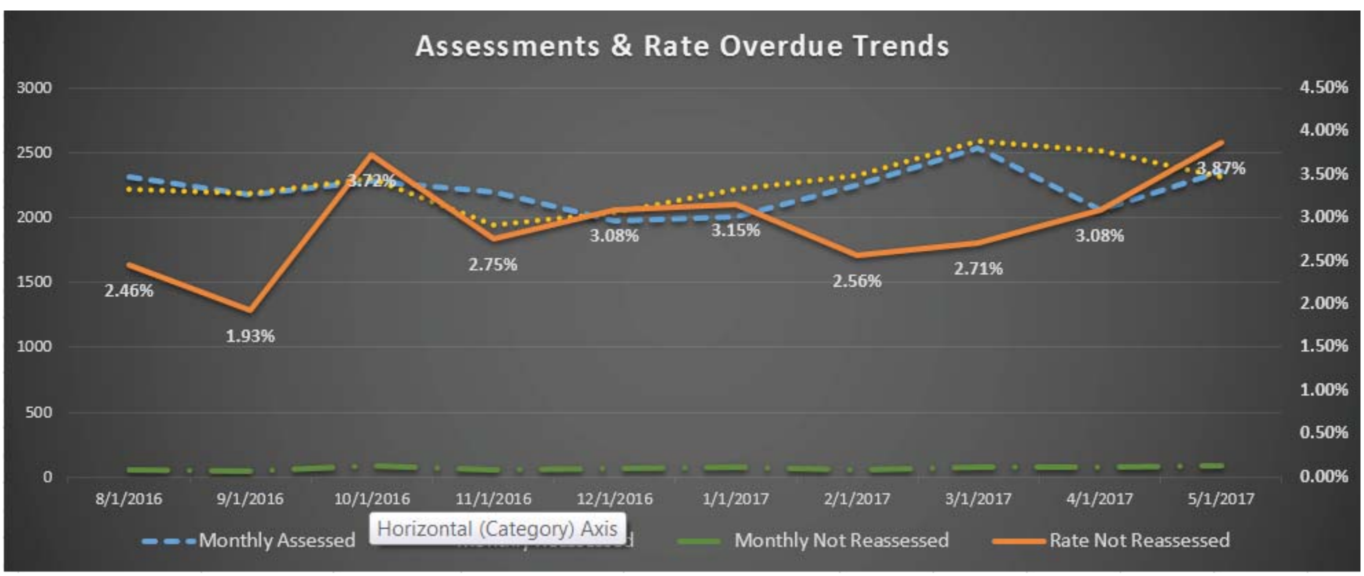
XIX CA/PS assessments expired - Trends

Report period: August 2016 - May 2017

This report provides statistics and list of CA/PS assessments which expired in the reporting months. *Expiring* is defined as an assessment which has passed its *Review Date*, or does not have an administrative extension with an active service plan, or is without a more recent assessment (XIX or otherwise) in a status of completed or pending.

Charlotte - Ashley Hayes, Bend

Review month	Valid assessments	Assessments due 6/2017 – 6/2018	Monthly assessed	Monthly re-assessed	Monthly not reassessed	Rate not re-assessed
5/1/17	33,482	28,722	2,356	2,311	93	**3.87%**
4/1/17	33,502	28,850	2,057	2,515	80	**3.08%**
3/1/17	33,539	28,343	2,536	2,588	72	**2.71%**
2/1/17	33471	28,843	2,244	2323	61	**2.56%**
1/1/17	33,409	29,123	2,001	2,213	72	**3.15%**
12/1/16	33,418	29,332	1,979	2,042	65	**3.08%**
11/1/16	33,621	29,428	2,195	1943	55	**2.75%**
10/1/16	33,784	29,105	2,285	2,305	89	**3.72%**
9/1/16	33,855	29,443	2,180	2,189	43	**1.93%**
8/1/16	33,806	29,212	2,316	2,222	56	**2.46%**



APD Medicaid Long-term Care Policy Unit

Looking for past issues of In the Loop? Do you wish you had an index to all the great information? All newsletters, yearly indexes, and a master index for everything are on the APD Field Services web page: www.dhs.state.or.us/spd/tools/field/index.htm.

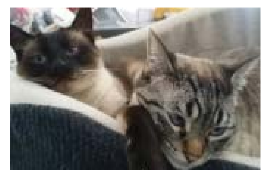
CAM - Standardization

There have been questions about the standardization of screenings and investigations for Centralized Abuse Management (CAM). We have prepared the following brief to outline where we are in this process, why it is important we standardize our policies and how CAM will fit into this process. It is a team effort with input across all programs. Your continued feedback as we move along will be appreciated. Please see this information as an update as to where we are right now. More to come.

Why are we embarking on standardization and what does it mean?

House Bill 4151 presented the state with an opportunity to review best practices, and in turn, make improvements in the way we do our work that will benefit the people we serve. *By standardizing all abuse work across all programs, it will better protect Oregonians from abuse and make our day to day work more effective.*

The standardization and policy work currently being done is important because it will help drive the development of Oregon's centralized abuse management system (CAM). This gives us a great opportunity to review the way we do our work and develop best practices and processes to unify our systems, our terminologies and the way we conduct investigations.



Kershaw and Katana - Cindy Wolford, Roseburg

It is important to know we're doing this important work thoughtfully, and we recognize there may be program specific requirements that can't be standardized. We'll go as far as we can in standardizing but we won't do things that damage program integrity.

Where are we in the process of standardizing?

We have been working with representation across program areas to identify key differences across programs and look at opportunities to standardize. We have looked at statutes, rules and program policies and are now in the process of deeper analysis to ensure the standardization recommendations meet all program needs.

How does CAM fit into this?

CAM is the system that will be used across programs to document the work of investigating reports of abuse. As such, it is being designed to support the standardization efforts currently underway. When staff participate in CAM workgroup activities, they may notice things are new to their work and still in the process of being standardized.

What might we expect to see standardized across all programs?

- Alignment of the criteria used to determine response time and the date/time used to initiate investigations;

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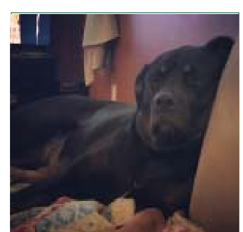
- Documentation that screened out reports have been reviewed by a supervisor or a lead worker;
- Alignment of the length of time provided for completion of an investigation and criteria used to extend the investigation time line when it cannot be completed in the required time frame;
- Determination of which situations call for a resident or other consumer receiving services to be named as the alleged perpetrator in an incident involving a fellow resident/consumer as the victim;
- How an investigation is reviewed for completion by a supervisor, lead worker, or other designated individual prior to finalizing the report;
- Terminology used for the intake and investigation process so the terms used apply across all programs completing the same set of work;
- Documentation of intake and investigation work to be written in a *victim specific format*, allowing for clarity in identification of the impacts to each individual.

Ashley Carson Cottingham, Lilia Teninty, and Justin Hopkins

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 241, *Questions to ask before selecting a Long-Term Care Facility*, is a ***NEW*** brochure to assist consumers and their families in finding a place to live which meets both their needs and preferences. The brochure includes website addresses for ADRC and DHS, and telephone numbers for the Ombudsman's office and APS. See APD-IM-17-052;
- APD 556V, *Individually- Based Freedoms and Protections*, is available on the HCBS Aging and People with Disabilities webpage.
- APD 747, *Community-Based Care Survey Process Guide*, is now available to print or download;
- MSC 371, *OPAR Fraud Investigation Unit Investigation Referral*, has been revised to align with the Overpayment Writing Unit process changes which were implemented in June 2017, See OPAR-IM-17-002;
- SDS 450, *Liability Worksheet for Long Term Care or Home and Community-Based Care*, is now updated with the current standards;
- SDS 737, *Client-Employed Provider Program Participation Agreement*, reflects information gathering changes to requirements detailed in APD-AR-17-41 and the June 2017 mandatory case management training.



Cassie - Jennifer Lawrence, Hillsboro

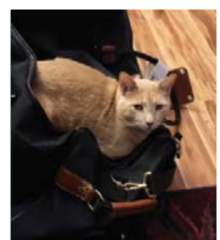
SNAP Q&A

Below are some Q&A from the SNAP Policy Analysts which appeared in the June 2017 edition of *On Target*. Please review the manual links and direct any additional questions to snap.policy@state.or.us.

Q: SNAP consumer is reapplying for benefits and provided the following letter from her doctor: *Jane Doe is currently receiving treatment for medical disorder that benefits from the presence of a service animal*. The consumer disclosed during the interview in the past she had seizures and the dog assists her by letting her know when it is time to take a rest, sit down, etc. The consumer voluntarily disclosed during the interview her seizures have been controlled by medication and she hasn't had a seizure in over 9 years. She is requesting service dog deductions on her SNAP case.

A: If the consumer is considered elderly or disabled (461-001-0015), per SNAP policy then yes they absolutely could receive a medical deduction on their SNAP case for cost related to their service animal. To determine which cost to allow as a medical deduction have a conversation with the consumer, and be sure to narrate,) about the cost of food, veterinarian bills and training for their service animal. Any medical cost over $35.01 will need to be verified to allow the medical deduction. The medical deduction for SNAP is as follows:

- Monthly costs of $35 or less will result in no medical deduction, so the consumer's statement is acceptable;
- Monthly costs of at least $35 but not over $205 will result in the *Standard Medical Deduction*, so you must verify the client has at least $35 per month in costs;
- Monthly costs over $205 must be fully verified to allow the actual costs. If the consumer reports costs over $205, but submits verification of at least $35 but not over $205, use the amount verified which will result in the *Standard Medical Deduction* instead of actual costs.



Mr. Hobbs - Cindy Pryor, Central Office

Additional information on medical deductions for consumers who are elderly or disabled can be found in the Family Services Manual, *SNAP. G. 21: Medical Deduction for elderly/ clients with disabilities*.

Q: Consumer stated she received a letter from SSA indicating her SSDI will be garnished. The consumer declined the offer to have her SSDI taxed and believes her income is gross only. When SSA garnishes her income, she feels the gross amount will decrease. Is this correct or will the gross income remain the same?

A: When a consumer's SSDI is being garnished, we would count the gross income when determining SNAP eligibility and then allow any eligible deductions such as child support

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or medical on the SNAP case. If the gross amount of the SSA benefit is being reduced to pay for an SSA overpayment, we will deduct that amount from the gross and code the difference.

Q: A SNAP applicant is solely on tube feeding and does not eat any food via mouth, the tube feeding is covered by Medicare. Would the consumer be eligible for SNAP benefits?

Bear - Cori Klosterman, Medford

A: Federal guidance (FNS) informs us the consumer is not eligible for SNAP, based on the fact he is not eating 51% of his meals. We would use the HH composition rule for this situation *SNAP C.1*: *Household Groups*. The SNAP benefits cannot be used to purchase the liquid diet which the Medicare/Medicaid benefit pays for, so there is no food to purchase. If this person truly eats no food, most likely someone is applying for the person as an authorized representative. We need to have a discussion with this person about how the benefit will be used. It would be fraud to use the SNAP EBT card to purchase food others will be eating

Q: Consumer reports on their SNAP application they have a Fundly account, much like a Go Fund Me Account. for the consumer's spouse's financial hardship. Would this income be considered as unearned income or not? If so, how would this income be anticipated?

A: The federal guidance we have received on crowd funding sites is to treat the actual value of funds that is accessible to the household as a resource.

Direct and indirect case manager contact honor roll

The following branches completed between 98% - 100% of their assigned contacts for May 2017. Great job everyone!!

Branch	Completion rate
0111	99%
0310	99.2%
0311	98.3%
0314	100%
0411	100%
0511	100%
0811	98.6%
0913	100%
0914	99.6%
1017	100%
1211	100%
1311	100%
1418	99.5%
1513	99.8%
1517	99.8%
1717	99%
1811	100%
1911	99.6%
2011	99.2%
2019	100%
2111	99.2%
2211	98.9%
2311	100%
2411	99.7%
2711	99.6%
2911	99.4%
3013	99.7%
3111	99.5%
3112	100%
3211	98.7%
3311	99%
3512	100%
3516	98.2%
3617	99.5%

APD Long Term Care Systems Policy Unit

EAU and branch files

Gustav - Karen Kaino, Central Office

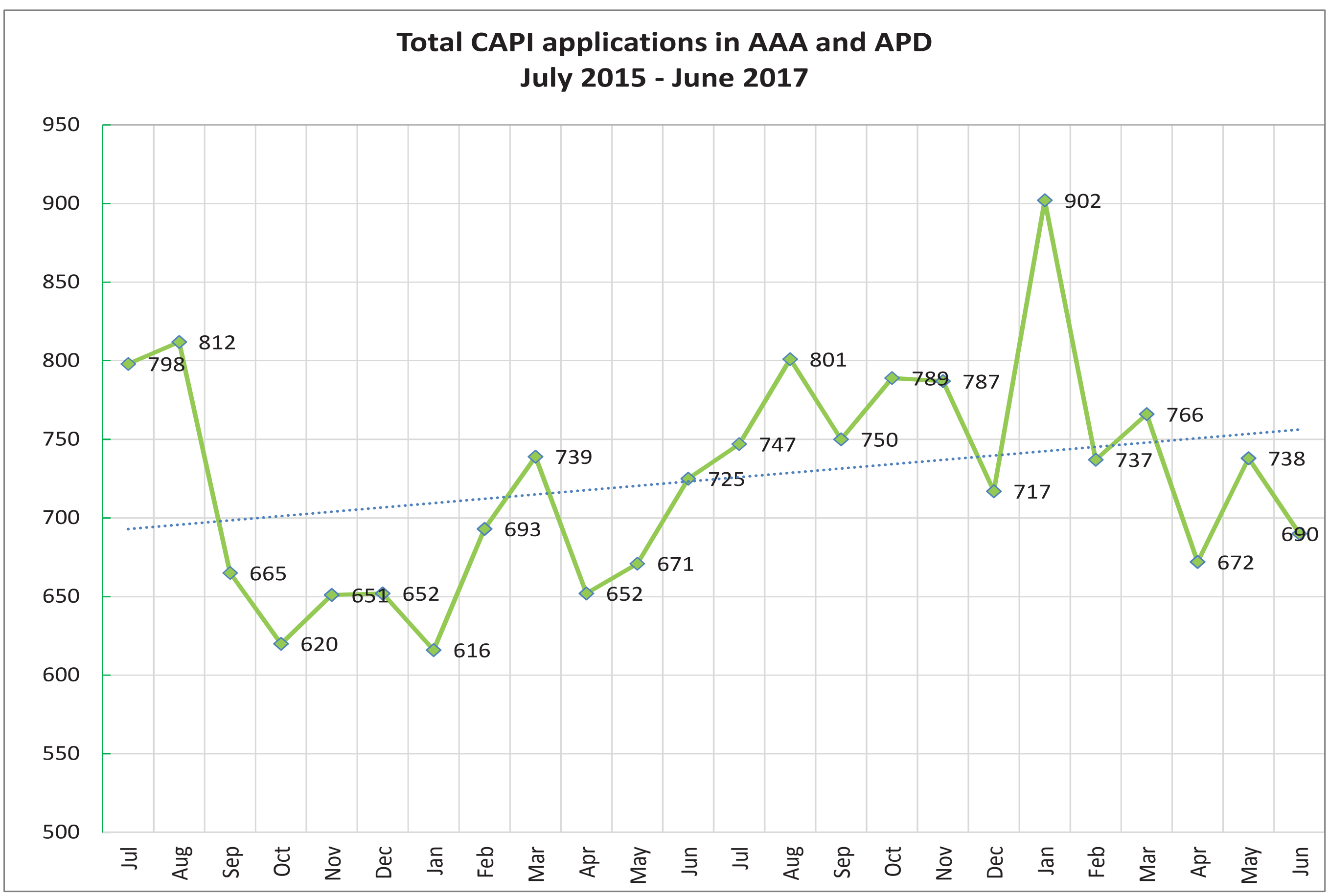
Having access to branch files in EDMS has become a valuable resource for the Estates Administration UNit (EAU). The ability to view a variety of documents in a deceased consumer's file can be important in terms of recovery.

Items of interest may include information about property (mortgage?), annuities, funeral plans, or the names and addresses of family members. Case managers may still be contacted occasionally for help in obtaining documents that aren't available in EDMS or for retrieving Archived files.

Narrating the accession and record numbers is a great help though. Thanks for making this information readily available to EAU. *Remember to email your Frequently Asked Questions (FAQs) to estate.admin@state.or.us and we'll answer them here!*

Kathleen Rossi, Estates Administration Unit

Don't forget! Staff can find narratives, including eligibility narrations, created by OHP branch 5503 in the TRACS system. Any AAA or APD staff person may have TRACS if their supervisor completes a DHS 783. Information on using TRACS and completing the 783 are on the TRACS information page.



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.

FYI: *Staff are expected to follow procedures and guidance in the FSAM.*

Q. If the consumer forgets to turn in their SNAP paperwork and they come in right after the deadline, do we have to ask about voter registration?

A: Yes you do. The consumer is treated like a new applicant for the purposes of voter registration. A Procedures, 2. When to offer voter registration

Q: Do we have to discuss voter registration for consumers with OSIPM only, no SNAP or services? We are just doing a desk audit.

A: If you are doing the yearly review for the SSI recipient and you do not see or speak to the consumer you do not have to ask about voter registration, *in this case*. This situation is not really a renewal because the consumer is not actively reapplying so it is outside of NVRA requirements. A Procedures, 2. When to offer voter registration *(This is a new addition to the manual - thanks for the new question!)*

Q: How do I report the voter registration cards when the week is split in two months?

A: The latest NVRA Agency Manual from the Secretary of State's office had guidance for exactly this situation. Page 15 of the manual says the office will need to submit two reports for that week with the *Today's date* and *Month reporting* fields reflecting the correct week and month.

Q We just want to clarify: When we narrate on a case, are we narrating *Yes* they took the form and *No* they don't want one? Or are we narrating *Yes* we offered and *No* we did not offer?

A: You are narrating *Yes* when the consumer or applicant wants/takes the forms, or it is mailed or left with them. Narrate *No* when they don't want/ take the form. The requirement is for every person who has a qualifying NVRA event (new, renew, move) to be asked about voter registration, so there is no point in narrating the consumer was asked, because *of course* they were asked. The narration reflects if the consumer received a voter registration card or not, based on their response. A. Procedures, 4. Acting on the consumer response

Mala - Kathie Young, Medford

Q: For the declinations, can it be stamped with the branch's received date stamp?

A: No it cannot. All completed voter registration items must be date stamped with the plain, date only stamp – even the declinations. B. Declinations

Don't forget! When searching for a spoken language interpreter, use ONLY the Office of Equity and Multicultural Services (OEMS) webpage. There have been changes effective July 1, 2017 so staff should not rely on any printed copies of either the interpreter process or available interpreters.

PACE resources

The Program of All-Inclusive Care for the Elderly, or PACE, is a national Medicare and Medicaid program offering all-inclusive health and wellness services. Currently PACE is available in all of Washington County, and parts of Clatsop, Tillamook, Washington, and Clackamas Counties.

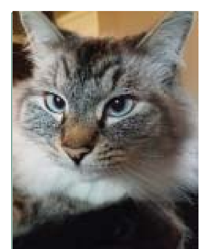
PACE services include:

- Long-term and primary care;
- Emergency services;
- Nursing home care;
- Hospice and palliative care;
- Medical supplies and equipment;
- Adult Day Services;
- Dental;
- Mental health care;
- Transportation;
- Plus a LOT more!

There are no co-pays or deductible but PACE do members pay a monthly premium for their long-term care and drug benefits; there is also a private pay option. Please encourage participants to make payments via the internet with the Electronic Payment System: https://apps.oregon.gov/ECommerce/DHSOHA/EPS/.

Persons who meet the following criteria can join PACE:

- Age 55 or older;
- Meet SPL 1-13 and can live safely in the community;
- Must be eligible for Medicaid or Medicare (or be private pay);
- Live in a PACE service area.


Teddy Shannon Agee - Central Office

Most services are provided in a single location for each participant at a Social and Health Center are where participants see their primary care doctors and receive most other PACE services.

Resources:

- Webpage on the Case Management Tool site;
- Informational PowerPoint;
- PowerPoint: PACE Training for Enrollment and Coding;
- Email Karen Kaino for internet payments;
- Email Cindy Susee for questions not answered on the webpage;
- Provider the toll-free number for consumer: 1-844-224-7223.

Please consider PACE for your consumers!

A letter from Lean Academy

Cohort 4

The Lean Academy family continues to grow and progress with the 4th Cohort. Currently, each of the Cohort 4 members are deep in their projects – some are gathering and analyzing data, developing solutions, and all are learning problem solving techniques and tools along the way!

Cohort 5

Recruitment has officially closed for Cohort 5 and those selected have gone through the application and screening process. Proudly, the applicants for this cohort provided for a diverse group of candidates from all over the state – showing what a powerful message Lean Academy has sent through the workforce. Those selected will be notified shortly and an announcement will soon follow. Look for the message and future information about this 5th Cohort as it extends the building capacity of Local Lean Leaders!

Cohort 6

As Cohort 5 recruitment ends, work has already begun for the 6th Cohort of Lean Academy. If you have applied for Lean Academy in the past or have considered applying in the future, then please look out for the next cohort recruitment and take the opportunity to apply. Lean Academy can provide skills and experience that benefit you and those around you. Keep an eye out and consider the contact information below.

Other news

The Lean Academy team and the Office of Continuous Improvement have been working hard to extend the knowledge of 7-Step Lean Methodology to those beyond Lean Academy. Other venues are being explored and built to provide a series of trainings around the proven processes and tools. Look for upcoming news on future trainings of 7-Step problem solving!

Contact us

Questions about Lean Academy? Contact us on our Lean Academy – specific e-mail address: OCIDirector.LeanAcademy@State.or.us. Or check us out on our intranet site!

Josh Harlukowicz Office of Continuous Improvement

494 Special Needs Contract reminder

Before submitting the SDS 494, S*pecial Needs Contact (SNC) Admission Request*, to the APD Admissions mailbox, please make sure the entire form is completed down to the Central Office section.

Also - double check the *Statements of Work* and vacancy reports on the SNC website and make sure the narration and current assessment clearly indicate why the placement is necessary and appropriate.

Benji and Justice - Christina Pattugalan, Hillsboro

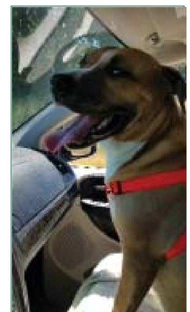
For more information see In the Loop July 2016 and August 2016, and the SNC webpage.

Advocacy and Development - Did you know?

Did you know Central Office has a unit dedicated to help our consumers and stakeholders bring their voice to our work? The rumors are true, we do! Advocacy and Development is honored to serve the people who stand up to bring their ideas, opinions and feedback to our policy tables. In fact, bringing these voices to the table is critical to ensuring that we have a balanced and well thought-out policy-making that ensures our service provision meets the needs of those we serve and all older adult and disabled citizens across Oregon.

Regardless of where in our agency you work, you are an important part of the advocacy pipeline. Our field staff tirelessly advocates for the needs of the consumers they work with to ensure that we are providing the best service in the safest, most independent and person-centered way. We are all advocates and we appreciate all you do!

Here's a sample of the work we're involved in from the Central Office perspective. In future editions of In the Loop we will bring you more information about specific initiatives and how you can help.


Toby - Janice Castle, Central Office

- Provide policy staff support for: The Governor's Commission on Senior Services (GCSS), Oregon Disabilities Commission (ODC) Oregon Deaf and Hard of Hearing Services Advisory Board (ODHHS);
- Lead strategic initiatives on Services Equity;
- Tribal relations;
- Oregon Money Management Program (OMMP);
- Disability Services Advisory Council(s) (DSAC);
- CAI – Community Access Initiative – Coming to a field office near you, soon!
- Coordination of assistive technology (ASL interpreting, CART and other).

If you have questions about the role of Advocacy and Development feel free to email Julie Jacobs, Program Manager at Julie.a.Jacobs@state.or.us.

NVRA change

An important change for voter registration requires staff to mail the consumer or applicant a voter registration card, SEL 503, if they do not answer the question of voter registration and have had a qualifying event and the consumer is not available to answer it now.

For instance, the 539A went to the consumer without the question marked and is returned with the question still not marked. Or the 24B notice is turned in and indicates the consumer has a new mailing address.

In both instances, instead of calling the consumer to ask about voter registration or waiting until the next event (very wrong), just mail an SEL 503 to the consumer and narrate.

Mark the declination *Yes*, and narrate *Voter Reg.: Yes*. Note: When the consumer gets a voter registration card, for any reason, the declination is marked Yes.