

In the Loop

2018 legislative highlights

In addition to extending the nursing facility assessment and granting a five percent increase for community based care, a special purpose appropriation of \$300,000 was created for DHS and the Oregon Health Authority to develop a plan to increase access to ventilator-assisted services in nursing facilities.

The Legislature also approved an investment of \$4.3 million and 33 positions for the Background Check Unit to cover the costs of providing background checks and increase staffing levels to reduce the waiting time to two weeks by end of December 2018.

Beyond the budget, two bills of significance for APD were passed.

- SB1534 directs the Department to develop minimum training standards and continuing education requirements for homecare and personal support workers.
- HB4129 creates a new comprehensive licensing board at OHA’s Office of Health Licensing that will continue the oversight for nursing home administrators and will add administrators from assisted living, residential care, and memory care communities.

We appreciate the progress that was made and we will be discussing these changes in more detail with you in the coming months.

Excerpted from Director Ashley Carson Cottingham’s March 7 email

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

Central Office chili cook-off results

Thank you so much – the results are in! APD Central Office raised **\$340** to help feed families and people with food insecurity! **The winners are:**

People’s choice:

- Best traditional: **Dean Susee** (Cindy Susee’s husband!)
- Best non-traditional: **Chad Ludwig** (DD)
- Best in heat: **Prasad Yarlagedda** (ONE project).

Morale Committee’s choice:

- Best name: **Nate Singer: So Hot – It’s Fired!!** (Deputy Director, Operations)
- Fanciest Crock-Pot: **Kevin Everidge** (Manager, Central Delivery Supports)

Thank you to everyone who made chili, bought chili, and voted! And thank you to the Morale Committee and everyone else for putting it together. Great job!

EAU brochure use

The Estate Administration Unit (EAU) is contacted on a regular basis with questions about the recovery process. We’re pleased to relay this information but case managers can help out too.

Providing brochure [MSC 9093](#), *Estate Recovery Program*, to **all** Medicaid recipients is one way to ensure they understand the process, even if it doesn’t apply to their current situation (MAGI).

Brochures can be ordered by contacting your office’s forms coordinator or emailing a request to DHS-OHA.Distribution@dhsola.state.or.us. Let’s keep our consumers “In the Loop” about estate recovery!

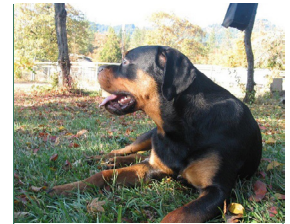
Kathleen Rossi, Estate Administration Unit

CAM monthly calls

The Centralized Abuse Management Project (CAM) team is hosting conference calls for the project team to provide updates and answer your questions.

Calls are scheduled for the 4th Wednesday of every month from 9:30 – 10:30. Call in formation:

- Call in number: 877-411-9748
- Participant code: 501927



Hugo - Robyn Schacher, Grants Pass

All staff interested in CAM are welcome to participate.

Past issues of In the Loop and indices for In the Loop and the *On Target* newsletter are on the APD Field Services web page: www.dhs.state.or.us/spd/tools/field/index.htm.

April 2018

- Parkinson’s awareness month
- Stress awareness month
- Workplace conflict awareness month
- Apr. 1 - 7: Medication safety week
- Apr. 8 - 14: Crime victims rights week
- Apr. 15 - 22: National volunteer week
- Apr. 24 - 30: World immunization week
- Apr. 2: World autism day
- Apr. 4: World walking day
- Apr. 9: Former POW recognition day
- Apr. 11: World Parkinson’s day
- Apr. 17: Bat appreciation day
- Apr. 23: World book night
- Apr. 16: Take our daughters and sons to work day
- Apr. 30: Adopt a shelter pet day

Overpayment Writing Unit

Who we are and how to refer an overpayment

Have you ever worked a case and discovered something was amiss? Maybe you found the consumer was working and didn't report the job, that the previous worker made a mistake? When you discover these issues—what do you do? You make a referral to the Overpayment Writing Unit (OWU)—that's what you do.

The Overpayment Writing Unit is within the Office of Payment Accuracy and Recovery (OPAR) and consists of 18 overpayment writers: 2 lead workers, 12.5 SSP overpayment writers, 2 APD writers, and 1.5 child care provider writers. We process hundreds of referrals each month from referral sources such as data match with OED, Investigations, branch referrals, and QC reviews. During 2017 our average dollar total for overpayments (ovps) written in a month is \$978,702.66.

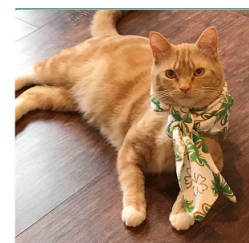
Ovp referral process (the condensed version): When you discover a potential ovp, you need to complete the Overpayment Referral form. Once you've completed the referral, you submit it and any supporting documentation that you have to OWU. The e-mail address is *Referrals Overpayment* in Outlook or overpayment.referrals@state.or.us; the FAX number is 503-373-1525. Submission information is located at the bottom of the referral form. The ovp threshold information is located on page 2 of the referral form.

Quicks tips for completing the best referral ever (284F/284R):

1. Please complete **ALL** sections of the most current version of the Overpayment Referral form: MSC 284F for SSP or MSC 284R for APD including:
 - Provide the approximate dates of the ovp;

Describe the cause of the ovp. If the referral is due to unreported earnings, indicate the name(s) of the employer(s), and the participant(s); and

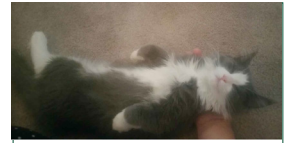
Fully explain the cause of the overpayment.
2. Include your full name, branch number, date, and your phone number (direct line or extension), so you may be contacted if there are questions about your referral.
3. E-mail the referral to: *Referrals Overpayment* in Outlook or overpayment.referrals@state.or.us. Send only one copy of the referral.
4. Reminder about SRS reporting requirements:
 - For SNAP remember to allow SRS reporting requirements in reference to ovp thresholds general rule of thumb is, when a participant goes over the CIL, SRS "eats" two months of the potential ovp.



Schroeder -
Sarah Hansen,
Central Office

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Dewey - Autumn Cuevas, Albany

- For example: The consumer’s income exceeds the CIL in 1/18. The income should be reported by 2/10/18. The worker would take action on the case for 3/18. The potential ovp does not start until 3/18, when we would adjust/reduce the case.
 - If the participant *accurately* reports income over the CIL at application they have no further reporting requirements. You would not refer for an overpayment because the income later exceeds 185% of the FPL.
5. If the cause of the overpayment is related to income, something we can verify from an employer or system screen, then use the 284F/284R.
 6. If the cause of the overpayment is related to household composition - people in the home with income, or people out of the home and not reported as such - then use an MSC 371 to send a referral to the Fraud Investigations Unit (FIU). FIU can investigate and confirm if/when the unreported person came into or left the home. The Outlook e-mail address is Fraud-Investigations DHS in Outlook or dhs.fraud-investigations@state.or.us.

Overpayment Writing Unit - Office of Payment Accuracy and Recovery

Medford DSO food drive results

The Medford Disability Services Office, branch 1517, participated in the Governor’s Food Drive in a couple of ways.

Mainly we had a competition between our teams, case management vs eligibility/ support staff, to see which group could raise the most food and money for our local food pantry. Congratulations to the winning team of the competition: Case managers!

Our office raised a total of **\$369.50 AND 213 pounds of food** which was donated to Access. Our SWELL (Social and Wellness) Committee sponsored the challenge.

Great job Medford!



L-R: Alicia Vejar, Maggie Beck, Amanda Brewster, Mickie Miner, Tina Vandertuuk, and Sara Worley

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 [540P](#), *Notification of Increase in Service Payment*, has updated language, and improved readability.
- APD [0914](#) *Client Choice of Service Options*, in all languages is now interactive/fillable.
- DHS 210 in [English](#), [Russian](#), and [Vietnamese](#) is now interactive/fillable;
- DHS [1005](#), *Alternate Format Request (Commitment to the ADA Act)*, is updated to meet the requirements of the ACT.
- DHS [2841](#) *Complex Case Consultation Referral*, is a new form - see page 9.
- DHS [9017](#), *QMB Qualified Medicare Beneficiaries*, brochure is updated in English and [Spanish](#) with current FPLs.

Report moving violations and offenses

Everyone who uses a state car must report all vehicle incidents, including accidents and citations, which occur in the state car and in a private car both on and off work. This requirement applies even if there is an accident which is not your fault, or for a citation which is given at any time.

You are also required to report to your manager any driving convictions, arrests, driving restrictions, license suspensions, restrictions or revocations within five (5) days of the charge or conviction. Staff who fail to comply could face a loss of driving privileges and disciplinary action.

To read more about this policy and your obligations, please see the DAS Vehicle Use for State Business policy ([DHS-085-005](#)), specifically page 4 *Driver Conduct*.



Don't forget! When a homecare worker is eligible to claim exempt status for income tax withholding, the local APD/AAA office staff enters their information into the *Provider Maintenance Financial/Tax Info* screen on Oregon ACCESS from the completed W-4. **DO NOT FORWARD THE W-4!** Keep W-4s at the local office for at least 4 years. See [APD-AR-18-016](#) for more information.

Reminders from APD Financial Policy Unit

- If you are having problems with death-related activities in Oregon ACCESS or detaching case members, please contact [Heather Williams](#) or [Ada Osuna](#) for assistance before contacting the Service Desk. If you need to correct a date of death and you already integrated the case, send an [online request to CMU](#); the Service Desk cannot correct the date of death.
- Retroactive closures or reductions are never allowed except in the case of death. Central Office has seen cases where the worker integrated the closure or reduction timely, but for some reason, CMS/DHR did not register the action until the next month. To avoid the necessity of restoring benefits, every time you take an action to reduce or close, navigate to the CM case in DHR, save in real time (hit F9), and then check MMIS to ensure the action was completed. It's a good idea to do this every time you take an action on a medical case.
- Please do not open medical benefits until you check MMIS for any current medical coverage first. Remember that except for the OSV case descriptor, service-only cases look just like OSIPM medical cases, so checking CM for open medical is not sufficient.



*Mugsy and Rennie
- Denise Henry,
Grants Pass*



“Like” [Aging and people with Disabilities](#) on Facebook to see messages from our Director; meeting notices, job opportunities, celebrations, events, and much more!

More NVRA Q&A

Below 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. XIII](#) for the complete NVRA manual, including procedures and examples.

FYI: *Staff are expected to follow procedures and guidance in the [FSAM](#).*

Q: My consumer just completed a DMV address change form which says her address will be updated for voting. She also completed the 503. Do I need to narrate anything about the DMV form? Should I say anything about checking the box on the DMV form?

A: Unfortunately, this is not a rare occurrence, and she will be asked to update her voter registration information twice. AAA and APD are not supposed to address the DMV voter registration in any way because the Motor Voter part of the NVRA is not set up to cross over to us.

This means even if she hands you BOTH forms and ours is marked NO but you know her registration will be auto updated by the DMV, we only can use the info on our agency form. If she does ask, you can (neutrally) let her know what the law says they will auto update her voter registration at the DMV and she can choose if she wants them to be involved.

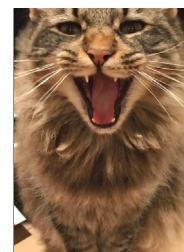
Q: At annual redetermination we have an ongoing CM complete the financial review, then an assessment CM completes the assessment. Once the assessment is completed the ongoing CM calls the consumer to get the service plan set up. Currently we are addressing NVRA during the financial review and again at the assessment, should we also offer a third time when we set up the service plan?

A: No, please don't do that. Voter registration only needs to be addressed once per qualifying event (new, renew, or move) and it should be done at the earliest contact with the consumer. If the consumer participates in the financial review, ask then. If the consumer is not available until the assessment, you will need to wait until the assessment. [FSAM XIII. A. 2. When to offer voter registration](#)

Q: We have run out of voter registration forms. We have forms with declinations attached case workers give out to consumers. Where am I able to order more of those, and is it possible to give the forms with declinations to non-consumers until we get more of the regular ones?

A. There are two separate things going on here: a) forms ordering, and b) using a replacement registration form.

a) All forms are ordered through the standard forms ordering system, FBOS. Whoever



*Tank -
Shannen
Woolridge,
Roseburg*

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orders forms in your office can get more. *Site coordinators are responsible for making sure offices never run out of forms!* FSAM XIII. [D. Registration forms](#); [E. Local site coordinators](#)

b) The two registration forms are NEVER interchangeable. We are required by the ACT to have two different voter registration forms – one for the public (the lobby lick-and-stick forms) and one for the Agency.

Agency forms (SEL 503) may not left be in the lobby. Not ever. Not for any reason. That is literally the federal law.

If you cannot borrow any lobby forms (SEL 500) from a neighboring branch, ***your only option*** – and I am not kidding – is to ask every person who comes in if they want to register to vote and hand them an SEL 503 with the declination removed and marked yes. Everyone gets asked AND everyone gets a card if they will take it in case they change their mind (really). You also have to let all of those folks know the office can mail the card for them if they want you to. FSAM XIII. [D. Registration forms](#)

Q: I would like to register a backup NVRA Site Coordinator, but it looks like if I do it online via the Form 504c it would change it. Is there a way to add someone without deleting the current coordinator?

A: Just fill out the 504c form as usual and leave the *Previous coordinator* section blank.



“Like” [ADRC of Oregon](#) on Facebook to keep up with all the latest news and information from the ADRC. You’ll also find advice, links, and comments from consumers.

APS self-reporting

It is everyone’s responsibility to do their part to ensure resident protection and the prevention of abuse is a top priority. Reporting incidents of abuse or suspected abuse is a primary responsibility providers and their staff must follow and be accountable for at all times. Residents depend on all facility staff to ensure they are safe and living in an environment that is free from abuse and neglect.

House Bill 3359, effective January 1, 2018 now allows DHS to impose a civil penalty of no more than \$1,000 per violation on APD licensed Assisted Living, Residential Care and Nursing Facilities for the failure to report alleged abuse of a resident. Though the penalty does not apply to Adult Foster Homes, the requirement to report does.

Adult Protective Service Specialists will now document within each investigative report if the facility self-reported or not for Corrective Action review. See Policy Transmittal [APD-PT-18-003](#) for instructions.



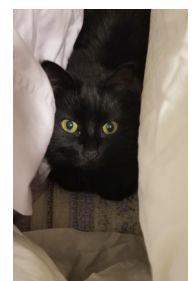
Sasha Lou - Denise Henry, Grants Pass

Direct and indirect WCM completion statistics

January and February 2018

Moving forward we will be producing the waived case management (WCM) statistics report on the first business day of the month and will reflect the prior month (instead of one month prior).

Branch	% Comp. Jan.	% Comp. Feb.	Branch	% Comp. Jan.	% Comp. Feb.
0111	96.8%	98.9%	2111	98.8%	98.6%
0310	98.9%	98.6%	2211	99.7%	99.4%
0311	99.7%	99.2%	2311	100%	99.3%
0313	99.3%	90%	2411	99.9%	98.5%
0314	99.6%	99.7%	2518	98.2%	96.8%
0411	100%	100%	2711	99.6%	99.4%
0511	99.3%	100%	2818	98.7%	98.3%
0611	86.9%	85.1%	2911	100%	100%
0811	97.8%	89.4%	3011	99.2%	100%
0911	98.3%	91.6%	3013	99.7%	100%
0913	100%	100%	3111	100%	99.5%
0914	99.6%	99.6%	3112	100%	100%
1017	100%	100%	3211	100%	99.4%
1211	100%	100%	3311	98.6%	99.3%
1311	100%	100%	3411	99.3%	97.3%
1418	99.2%	99.5%	3415	71.5%	74.8%
1513	99.9%	90.7%	3417	76.8%	77.1%
1517	99.6%	100%	3515	97.2%	96.6%
1611	79.1%	77.1%	3516	96.2%	91.3%
1612	91%	96.8%	3518	98.9%	97%
1717	98.4%	99%	3617	99.6%	99.5%
1811	99.2%	99.6%	5510	92.3%	77.8%
1911	99.3%	99.8%			
2011	99.1%	98.9%			
Avg.	97.07%	95.94%			



Durin - Karen Kaino, Central Office

Complex case referrals

Effective immediately there is a new form to use when making Complex Case Consultation referrals. This form has been updated to comply with all of APD's forms requirements and is now located on the forms server with form number [DHS 2841](#).

Please make sure you are always sending a fully completed form along with any referral to APDComplexCase.ConsultationTeam@state.or.us. This allows us to have a full picture of the Consumer's needs so that we can make appropriate suggestions for possible placement efforts.

Please direct any questions about the form or the referral process to Complex Case Coordinator, Beth Lee at beth.lee@state.or.us.

Find help at Central Office using the [contacts](#) listed on the APD Staff Tools [page](#)!

Grants Pass food drive results

The Grants Pass APD office held a food drive competition and silent auction for the Governor's food drive. Organizer Shari Friebus had a secret goal of raising 100 pounds of food, and Grants Pass exceeded that goal and raised 133 pounds!

The units that participated were the Case Management Unit, Eligibility Unit, and Support Staff Unit. The Eligibility Unit brought in the most pounds of food, and they are going to be treated to a potluck lunch by the other units in the near future.

They also raised \$116 in a silent auction, and one employee met the Governor's Challenge.



Great job Grants Pass - thanks for sending this in Shari!

Transferring a case to another branch?

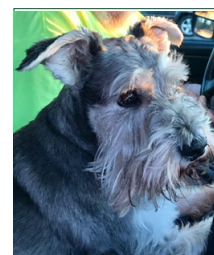
Central Office has been receiving reports of cases being transferred to other APD/AAA branches and the case not being clean or up to date.

To help make the transition easier and faster please be sure to call and email the new branch to discuss the transfer, update Oregon ACCESS with the new information including the address, phone #, shelter costs and household composition and cancel all Ancillary Services.

It is critical that you also remember to complete and log your Direct/ In-direct (WCM) contacts prior to transferring the case, so the receiving branch doesn't get dinged for the missed contact.

Here are some of the issues being reported:

- WCM contacts have been missed or not logged;
- Oregon ACCESS has not been updated;
- The receiving branch was not notified of the transfer.



Ziggy - Cindy Pryor, Central Office

DHS ROCKS

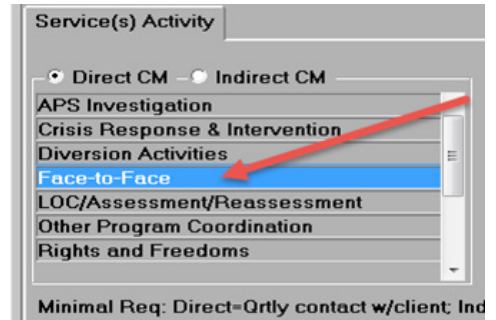
Why yes, that is Bill Brautigam on guitar for the DHS Rocks food drive event...



New direct contact type

On April 1, 2018 the CM Service(s) tab in Oregon ACCESS will be updated to include a new Direct CM contact. The new contact type is *Face-to-Face* and should be selected any time a Direct CM contact is completed face-to-face with the consumer or their designated representative.

This new CM Service type will be on the list for Direct CM services added April 1, 2018 or later.



ABAWD – January 2018 updates

Five modules are available to provide an overview of ABAWD updates effective January 2018. The modules are edited versions of the previously recorded sessions.

Session 1 covers the following topics:

- Strength based approach
- Work registrant defined
- ABAWD defined
- 36 month fixed clock

Session 2 covers the following topics:

- ABAWD defined
- ABAWD exemption to the time limit
- SNAP benefit options
- Narration

Session 3 covers the following topics:

- Work Requirements
- Options to meet work requirements
- Certification period
- Countable months

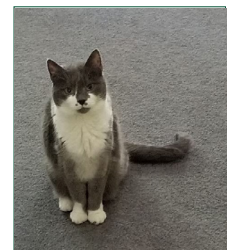
Session 4 covers the following topics:

- Tracking time limits
- Notices (NOTM)
- Reporting requirements

Session 5 covers the following topics:

- ABAWDs with existing countable months
- Removing countable months
- Regaining eligibility
- Steps to take CT4, CT5, CT6
- Transfer in and out

All training sessions are available via [iLearn](#) and take approximately 15 minutes.



Miss Kitty - Don Stearman, Grants Pass



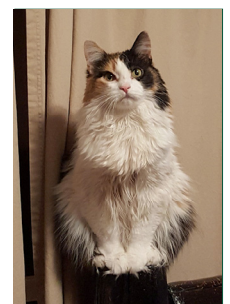
Don't forget! Wondering [how to place](#) a consumer in a special needs contracted (SNC) facility? Here is [a link](#) for a vacancy list and the contract statements of work. Heard about [494](#) form and want to know more? Other questions? See the SNC [website](#) or contact Amy Gordin, amy.gordin@state.or.us.

Consumers using feeling tubes and SNAP

This corrects a June 2017 On Target article with some inaccurate information.

Individuals who are on a SNAP application and use tube feeding as their sole or primary nutritional intake, TF persons, do NOT fall out of the household (HH) group. The 51% meal test is only for persons living in more than one HH. Please see below for correct guidance on eligibility and best practices for those using tube feeding.

- If the TF person is NOT applying for SNAP, determine if they must be in all eligibility groups before the benefit group.
 - Some elderly TF persons who meet additional criteria may be excluded at the filing group level; this may be beneficial if there is income. Please review OAR [461-110-0370](#) at 3 and discuss the options with the group.
- If the TF person is required to be in the filing, financial, and need groups; but is not applying for SNAP, a special DHR coding is needed.
 - The TF person would be coded DP or DH and income and deductions, except the utility allotment, would be manually prorated.
- If the TF person IS applying for SNAP in a group, independently, or through an authorized representative, have a conversation with the applicant regarding SNAP purchases for the TF person and narrate.
 - Some persons are solely on tube feeding for their nutritional intake. They do not eat any food via mouth, no food is purchased to administer via tube feeding, and the tube feeding formula is (usually) covered by Medicare. However, water used for mixing the formula can be purchased with SNAP benefits. This is a completely appropriate reason for a TF person to be in a SNAP benefit group.
 - Some persons purchase food to be prepared and administered via tube feeding in addition to the formula.
- If the TF person will not use SNAP for any food or water purchases, an at-length discussion should occur between the applicant(s) and DHS.
 - It could be considered fraud if SNAP benefits were never used by the TF person. There are no rules to support denying an applicant for this reason.
 - If someone states they do not intend to make any food or water purchases for a TF person on a SNAP case; narrate the conversation, determine eligibility as usual, and send a fraud referral.



Bailey - Kim
Shepherd,
Pendleton

SNAP Civil Rights 2018

The 2018 SNAP Civil Rights online training is now available on [iLearn](#). This is the annual required course for anyone working with SNAP benefits. It is beneficial and recommended for other DHS staff and community partners.

The SNAP Civil Rights course must be taken *yearly*. Locate this year's version by searching *SNAP Civil Rights*. **Please note:** This training does not include an audio track.

Let's avoid the end of year rush

New LDMS training on iLearn

The Office of Continuous Improvement (OCI) has added five new trainings on Lean Daily Management System (LDMS) to iLearn. The courses are:

- Basics;
- Huddle;
- Primary Visual Display (PVD);
- Continuous Improvement (CI) Meeting;
- Continuous Improvement (CI) sheet.

LDMS is required for all new employees. If you have already completed the LDMS trainings, OCI recommends these as a refresher.

APD Governance Team CI Sheet updates

The APD Governance Team is working through your CI sheets! Take a peek at the tracker on Team's intranet [page](#) to stay informed and to find the blank CI sheet to send in your ideas.

Here are some of the items we worked on in February:

- Douglas County, District 6, asked if the DHS 6608A SNAP recert letter could be suspended in favor of an APD/AAA specific letter. Unfortunately, this is not possible, but SNAP has agreed to add APD specific language to the notice at the next opportunity.
- Klamath/Lake County, District 11, requested a technical assistance manual for AFH licensing. This CI sheet has been accepted by Licensing and they are working on something to fill this request.
- Multnomah County wanted to know if Oregon ACCESS could be coded to print alternate languages and large print based on case coding instead of staff having to use the Forms Server options. This isn't possible with the current system and resources, but we have very high hopes this can happen with the new system.



LeGuin, Gooney, and
Gorey - Brian Kirk,
SFPSS

Unfortunately, not every CI sheet will have a positive outcome, but that does not mean you shouldn't send in your ideas! The SNAP notice is a great example of not being able to get what we want, but still finding a way to improve processes for staff and consumers.

The next meeting is in April – get those CI sheets in right away!

December 2017 direct and indirect WCM statistics

Waivered case management (WCM) direct and indirect contact completion data for December 2017.



Termite - Kelly Hendrix, Madras

Br	% Completed	Br	% Completed
0111	100%	1911	99.60%
0310	98.40%	2011	95.40%
0311	98.60%	2111	98.50%
0313	89.70%	2211	97.40%
0314	99.60%	2311	98.90%
0411	100%	2411	99.50%
0511	98.60%	2518	91.80%
0611	82.10%	2711	99.00%
0811	98.70%	2818	93.60%
0911	92.70%	2911	97.60%
0913	93.60%	3011	83.40%
0914	98.80%	3013	99.70%
1017	99.90%	3111	99.50%
1211	100%	3112	100%
1311	100%	3211	99.30%
1418	97.60%	3311	92.10%
1513	93.00%	3411	98.30%
1517	100%	3415	62.20%
1611	62.70%	3417	76.60%
1612	91.00%	3515	89.80%
1717	84.00%	3516	94.10%
1811	99.60%	Avg.	93.73%

Medicaid APD LTC Systems Policy Analyst

A letter from Lean Academy

Lean Academy was implemented as part of a strategy to build capacity in the field of problem solvers. By giving tools, mentorship, and training to identify, track, and use proven methods with empirical evidence to correctly address the root cause of a problem, we change the culture of stagnate or reactive changes and move into a culture of planning and logic. This directly affects the workers, the tax payers, and most importantly – the people we serve.

As the 6th Cohort of Lean Academy begins class and its year-long journey, APD finds itself with another four people from across the state gaining tools and resources to improve an area of work they see every day. From Hermiston to Klamath Falls, this Cohort represents a range of eager workers looking for the tools to help make a better process for the work they do.

Though class sizes are limited, there are additional resources that can benefit you from outside of the Lean Academy following the same methodology including:

- **7-Step Problem Solving:** An in-person class designed for the educating of Lean 7-Step in a short 2-day series. While serving some of Oregon’s most vulnerable, it seems only logical that APD gains the benefit of the Lean 7-Step problem solving.
- **Lean Daily Management System (LDMS):** Utilizing proven communication and problem identification strategies, LDMS helps organizations and workgroups stay on course and empower every employee. Look for trainings built in iLearn – just search for LDMS.”

Questions about Lean Academy? Contact us on our Lean Academy specific [e-mail address](#). Or check us out on our [intranet site](#)!

Nursing Facility Survey Unit (NFSU)

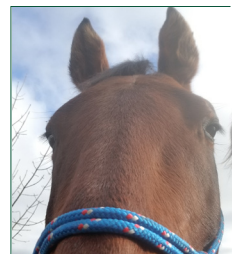
In last month's article we learned NFLU is not a new type of flu, it's the Nursing Facility Licensing Unit; and learned about a few of their responsibilities including inspections of Oregon's nursing facilities. Undoubtedly, you were left wondering who does the inspections? Or, maybe you have heard someone say *NFSU* or *CCMU* and wondered ... did they sneeze?... and you responded with "bless you!" If you are interested in learning more about NFSU and CCMU, keep reading.

The Nursing Facility Survey Unit (NFSU) is part of NFLU in APD's Safety, Oversight and Quality Unit (SOQU). NFSU used to be known as CCMU or Client Care Monitoring Unit when we were part of SDSD, SPD, and OLRO - that's all history and another article! We don't use the name CCMU anymore; aren't acronyms fun?!

Here's more review from last month's article, there are currently 136 nursing facilities across Oregon. One of the key distinguishing features of a nursing facility, sometimes referred to as a skilled nursing facility or intermediate care facility, is they are required by law to have licensed nurses on staff 24 hours a day, 7 days a week, and all direct care staff must be certified nursing assistants (CNAs).

NFSU is a team of health care professionals and includes client care surveyors, trainers, support and technology staff, and managers. Here are a few of the Nursing Facility Survey Unit's key facts and responsibilities:

- Client care surveyors complete a minimum six month curriculum of CMS and state training online, in the classroom, and in-the-field in preparation for the CMS exam known as Surveyor Minimum Qualification Test(SMQT) for survey qualification;
- We conduct annual unannounced onsite inspections, known as recertification and re-licensure surveys, in all nursing facilities in Oregon to determine if facilities comply with the state OARs and federal Centers for Medicare and Medicaid Services (CMS) rules and regulations. We issue reports called the Form CMS 2567 and State Form detailing the findings of the survey;
- We conduct unannounced onsite investigations known as complaint surveys for certain allegations of resident abuse/neglect in nursing facilities. In addition to issuing the reports noted above, we also prepare and issue to the complainant a report called a Complaint Incident Licensing Action(CILA);
- We provide technical survey process assistance and work with our colleagues in NFLU to clarify state and federal rules and regulations to local offices, facilities, residents, family members, and stakeholders;
- We require facilities to develop and implement approved survey plans of correction (POC) to protect residents and achieve compliance;
- We resurvey nursing facilities to determine if they successfully implement their POC to achieve and maintain regulatory compliance;



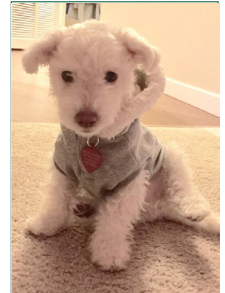
Bessie - Kathie Young, Medford

- We work with NFLU and CMS colleagues to apply corrective action measures and remedies when facilities are not in compliance.

Our entire NFSU team works to ensure Oregonians in nursing facilities are provided quality care and enjoy quality of life; we love what we do!

For more information about NFSU, or if you have any questions/concerns:

- NFLU website – Long Term Care [Survey](#)
- NFLU and NFSU email box: NFLicensing@dhsosha.state.or.us



Avery - Michelle Read, Beaverton

Keith Ramey, Nursing Facility Survey Unit

Facilities as authorized representatives (SNAP)

Recently there have been situations where facilities acting as authorized representatives have made inappropriate charges. It is good practice to annually review each responsibility listed on form DHS [0222](#), *Facility As Authorized Representative*, with the facility and make sure they have a copy. Some of the frequently forgotten requirements that should be reviewed are:

- Facilities may debit or spend no more than 50% of the resident's SNAP benefits on the 1st of the month. If the SNAP participant is still a resident on the 16th, the facility may spend the balance of the benefits issued that month.
- Facilities have no rights to access SNAP benefits issued before the participant enters the facility or after they leave.
- Facilities shall provide the local branch with a list of currently participating residents *each month*, signed by a responsible center ; form [222A](#) was created for this purpose. Please provide a copy if the authorized representative needs one.
- Facilities (the authorized representative) *must be knowledgeable* about each resident's circumstances and should carefully review these circumstances with residents **before** applying on their behalf.

If the application is not complete or information on IEVS screens is not reported, it may indicate this discussion has not occurred between the facility and resident. Address:

- Has the discussion occurred with the resident or do they need more time to do so?
- Is the resident paying rent or mortgage at their primary residence during their stay?
- Are other previously coded costs such as medical expenses continuing?

If a facility has debited SNAP benefits incorrectly, please do not immediately cancel the card. First, contact the facility and ask to speak to the person managing EBT charges and inform them of the incorrect transaction(s). Once the facility is made aware of the error they can credit benefits back to the SNAP participant's account with their EBT machine.

Please send SNAP Policy (snap.policy@state.or.us) an email with the facility name and the nature of the error if there is an incorrect charge or failure to submit a monthly 222A. Further reading on this topic is available in the SNAP [Facilities Worker Guide](#) in the FSM.

SNAP Policy Analysts