APD Field Services

In the Loop

Celebrating our state service

Excerpted from message by Director Fariborz Pakseresht

As I continue my visits around the state, you continue to tell me your work is rewarding as well as challenging. And that it is a privilege to help your fellow Oregonians in need. It's time for us all to celebrate and recognize your contribution.

This week Oregon joins states across the nation in celebrating Public Service Recognition Week. This week is set aside annually to honor public employees and to educate the public about the many ways government workers make life better for all Americans.

Governor Brown signed a State Employee Recognition Day proclamation and shares her gratitude for the work you do as ambassadors of public service; watch a recording online.

You can actively participate in Public Service Recognition Week. Print the attached photo card (*see last page*), write a message about why you're proud to serve and share that on social media. Use the hashtag #GoodWorkORDHS or #ORService. While you're at it, use this time to send an acknowledgment to fellow public servants who have made an impression on you.

I am reminded that it's that desire to help people reach their full potential that connects us all. It is my privilege to help you, help others, and to bring us closer together as an organization in service to Oregonians.

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

CLO and DEN actions

Usually a *CLO* or *DEN* action on a SNAP case indicates intent to end or deny benefits - occasionally, it doesn't. Sometimes a *CLO* or *DEN* action may be one of several computer actions done on the same day such as a system workaround to resolve complicated coding issues while accomplishing the need to approve and issue benefits.

Why does this matter? Any *CLO* or *DEN* action online could be pulled for a Quality Control (QC) review. The reviewer relies on case record information to determine if a negative action was valid and is not allowed to contact the worker to inquire or confirm the reason for the action. If the reason for the action is not clear, an error may be cited as an invalid denial or closure due to an action that was not documented or explained. For this reason, QC recommends workers narrate a simple statement that there was no intent to deny or end benefits.

This is different from a negative action that was reversed on the same day. If a case is closed and reopened a few minutes later, the closure is subject to QC review if there was intent to end benefits when the action occurred. For this reason, a certification completed the same day as a CLO or DEN is not enough to drop the review. However, if a CLO or DEN action is only a system workaround and there never was intent to close or deny, please narrate this.

Merlin - Shannon Seifert_MultCo ADVSD

Quality Assurance

APDRS training in Captivate

The training for the APD Receipting Solution (APDRS) has been converted to Captivate on the iLearn system and includes a voice text feature to make the training more accessible to everyone. The training is listed as *DHS – APD – APDRS Receipting Training Tool*.

Medicare scam alert

The Oregon Department of Justice (DOJ) has some tips keep consumers safe when their new Medicare cards arrive.

In an effort to protect older adults from identity theft, the federal government started mailing out new Medicare cards that come with a new 11-digit identification number instead of the Social Security number.

Though the effort is designed to help minimize fraud, it has already sparked a series of scams. Please let consumers know if their address is correct, they don't have to do anything to receive the new card; there is no activation process or fee. Medicare will not call and will never ask to verify a Social Security number or bank information.

"If someone calls and asks you for your personal information, money to activate the new card, or threatens to cancel your Medicare benefits if you don't share your personal information, just hang up! It is a scam," said Attorney General Ellen Rosenblum.

If a consumer thinks they have been contacted by a scammer please let DOJ know by calling the Department of Justice's Consumer Protection Hotline at 1-877-877-9392 or go to the Oregon Department of Justice website.

EAU and real property

The Estate Administration Unit (EAU) may seek recovery from a variety of estate assets, including real property.

Estate Administrators occasionally receive calls from customers or their representatives with concerns about a potential "lien" on a home. EAU doesn't place a *lien* on a customer's home. We may have a *claim* in their estate after the customer passes away (not during the lifetime of a surviving spouse). In many circumstances the home will be an estate asset and subject to creditors' claims, including estate recovery.

As always, please contact us with any questions about estate recovery: 503-378-2884, toll free in Oregon at 800-826-5675, or by email at estate.admin@state.or.us.

Kathleen Rossi, Estates Administration Unit

Introducing The Lead Training Hub

Quality Assurance (QA) would like to introduce The Hub. The Hub is a website tailored to Leads around the state to help with training and accuracy for both SSP and APD. Beginning May 1st, 2018, The Hub will be available with a menu of developed materials based on analyzed Quality Assurance accuracy data. You will see there is all programs available, SNAP, ERDC, TANF, TADVS and APD.
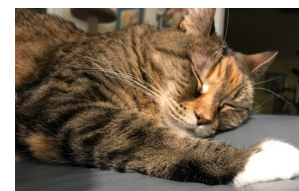
Our menu of materials is developed based on years of accuracy data. This has allowed QA to offer materials to address errors before they happen. We have streamlined the process by custom tailoring presentations, cheat sheets, skills challenges, hot topics, and so much more! Check out the webpage.

We value the hard work leads do every day. Leads are the go-to person for guidance in the branch. The Hub is here to make life easier, we have done the prep work for the next huddle or meeting. Our goal is to save time, so the Leads can do what they do best—provide exceptional customer service to the office and the Oregonians we serve.

Cassie - Jane-ellen Weidanz, Central Office

The materials will be updated every three months based on error data. This has been a collaboration between QA, the Self-Sufficiency Training Unit, and program policy analysts. The Lead Training Hub has a feedback icon to allow leads to share ideas, thoughts, and to provide new materials for future use. Within the feedback icon, any lead can send materials or resources used in their office. Let's share our ideas and the work. Our goal is to not only support the leads, but also recognize all the incredible work currently in place.

Save The Hub as a favorite; use our logo as your screen saver and don't miss an opportunity to vote on what you would like to see next! Watch the video of the late-night Coffee Chat introducing the QA Lead's Training Hub.

Quality Assurance

oregonsaves

A simple, easy way to help Oregonians and their families save for retirement.

Join Oregon Gerontological Association, the Oregon State Treasury and AARP Oregon for a light breakfast and program on OregonSaves, the new and easy way to save for retirement. With up to 1 million Oregonians behind on retirement savings, that has huge implications for the aging network. Find out how the new program is progressing and what it could mean for state budgets and senior services. Plus enjoy a delicious light breakfast and coffee.

■ $10 for OGA members and non-members.
$5 for students.

■ **May 9, 2018**
7:30–9:00 a.m.

■ **Oregon State Treasury**
16290 SW Upper Boones Ferry Rd.
Tigard, Oregon

REGISTER:
https://oregongero.org/event-2897074

What's the Need?

• More than 1 million Oregonians lack access to a retirement savings option through their workplace
• One out of six Oregonians aged 45-65 has less than $5,000 in retirement savings
• The average monthly Social Security benefit is $1,200, which isn't enough for Oregonians to depend on in retirement for basic needs like heat, food and medications

What's in it for Businesses?

• Easy Retirement Savings Option
• Easy Set-up & Low Maintenance
• No Mandatory Contributions
• No Administrative Employer Plan Fees
• Improved Employee Recruitment and Retention

What's in it for Workers and Families?

• Easy and simple way to build retirement savings
• Provides access to a professionally managed retirement savings account
• Automatic deduction from paycheck with flexibility
• Provides a solid financial future for Oregonians

OGA OREGON GERONTOLOGICAL ASSOCIATION

oregonsaves

AARP® Real Possibilities
Oregon

VET coding for SNAP

If we have a participant with veterans' income, we would code the income as *VET* on page 2 of FCAS. It does not matter what the percentage of disability is, income for this type of source would be *VET*.

For HH type field and using the *VET* code: the only time we should use the *VET* coding is if there is a 100% disability rating from the VA.

This *VET* code affects the calculation in the same way the SSI/SSD code does, allows medical deductions, and removes the cap on the shelter costs.

SNAP Policy Analysts

SNAP filing date exceptions

We can provide a better process for our participants by utilizing our two exceptions to having a participant re-establish a SNAP filing date and the need to re-sign the application.

- The first exception is when you are denying benefits in the initial month and approving benefits for the second month. In this situation, you would simply adjust the filing date to the first of the month in which benefits will start. The best part is that the participant does not need to re-sign the application in this instance.

- The second exception is when the participant submits pending items after the 30th day from the filing date and they did not request more time to extend the filing date, the date the pending items are submitted sets the new filing date. The participant does not need to re-sign the application.

Quality Assurance

Medical cost verification records for SNAP

DHS is required to archive its records. Documents submitted to DHS and used to determine SNAP eligibility are to be archived, including medical cost verifications. The archiving policy is DHS-050-005 and states in part:

"It is the Department's responsibility to ensure the preservation of archived information essential to the needs of the agency and to ensure punctual destruction of physical documents."
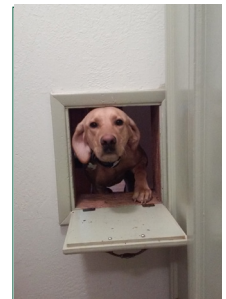
Sunnie - Shari Friebus, Grants Pass

Medical verification records become a requirement to review for QC reviews, QA reviews, and administrative hearings; as medical costs directly impact SNAP allotments.

If you believe a medical record is sensitive, please follow the EDMS sensitive documents processes outlined in transmittal SS-AR-15-013.

SNAP Policy Analysts

Find help at Central Office using the contacts listed on the APD Staff Tools page!

Don't forget! Income codes matter! Please take time to make sure the income is coded with the correct code in Oregon ACCESS and the mainframe SNAP case. Some income types on the SNAP case will effect things such as the shelter calculation and all income types have to be right so the system can make determinations accurately. If you're not sure which code to use, remember *F1* is your friend!

Waivered case management completion statistics

Sorted by date and by branch for March and April 2018.

Branch #	March	April	Branch #	March	April
111	100%	100%	2111	99.20%	98.70%
310	100%	100%	2211	98.50%	98.70%
311	99.30%	99.80%	2311	100%	100%
313	98.90%	100%	2411	99.70%	100%
314	99.70%	100%	2518	94.00%	94.80%
411	100%	100%	2711	99.70%	100%
511	98.60%	98.70%	2818	96.90%	97.40%
611	99.70%	99.90%	2911	89.10%	98.20%
811	100%	98.70%	3011	100%	100%
911	94.20%	97.50%	3013	100%	95.40%
913	100%	100%	3111	100%	100%
914	99.60%	99.30%	3112	100%	100%
1017	99.90%	99.90%	3211	100%	100%
1211	100%	100%	3311	100%	99.70%
1311	100%	100%	3411	98.50%	99.00%
1418	99.50%	99.70%	3415	70.80%	84.50%
1513	99.40%	99.90%	3417	74.70%	94.60%
1517	100%	100%	3515	97.80%	98.30%
1611	95.80%	94.60%	3516	95.20%	90.90%
1612	95.20%	90.60%	3518	96.20%	99.10%
1717	96.30%	96.10%	3617	100%	99.90%
1811	99.80%	99.80%	5510	96.20%	100%
1911	100%	100%			
2011	98.50%	99.10%	Avg.	97.41%	98.32%

A letter from Lean Academy – APD project spotlight

As a project spotlight for APD in Lean Academy, we interviewed **Stephanie Porter**. Stephanie is an Adult Foster Home Licensor (AFH) in the Medford SSO and her project is regarding her team completing monitoring visits for the AFHs in the area.

1. **What is your problem statement?**
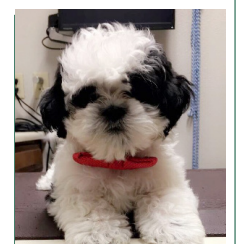
Bentley - Amanda Brewster, Medford

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> *The District 8 Local Licensing Authority process has an expectation of 1 monitoring visit a year for AFHs and is currently only performing at a 68% completion rate. Monitoring visits are to be conducted in order to minimize safety concerns for our consumers residing in AFHs in Jackson and Josephine County.*

2. **What drew you to taking on this project?**

   I wanted to address something that I knew I personally needed to improve on and that would positively impact the consumers in our area.

3. **What are the identified root causes of the identified issues?**

   We went through and discussed our daily workload barriers but found the root was really that we didn't have a process to support our prioritization and to support each other.

4. **Are there any "ah ha" moments you would like to share?**

   I tend to be a linear-thinking person and my "ah ha" moment has been the fluidity of my Lean project. I may have in my mind how everything is going to go but each team and project is different and I learned that Lean is a myriad of tools, ideas, and processes and not a straight line in which each tool will fit each situation.

5. **What are some notable pieces of the project that you would like to share?**

   We theorized before collecting data that geographical location would play a large piece in the homes we were monitoring and that homes that are far distances from us would be seen less than homes close to our office. Our data should almost the opposite and our own zip code had the highest number of homes without monitoring visits completed!

6. **What is the status of your project?**

   We are piloting a standard process developed through the Lean process. Currently we are over 60 days into the pilot and are consistently completing more monitoring visits than previous years.

Umpy - Cindy Wolford, Roseburg

7. **Are there any take away ideas you would like to share?**

   Time spent on continuous improvement through the Lean process is necessary because it ensures solutions developed are valuable. It was not easy having several meetings to discuss and plan how to resolve a concern however the outcome is then well thought, backed up by data analysis, and is well planned, which saves time in the long-run.

We thank Stephanie and her team for their hard work on this project and look forward to continuing to support them through to a successful Lean Academy project!

Another APD Lean Academy project we look forward to spotlighting is Scott Spencer of Salem and his project regarding in-home care requests! Keep an eye for more project spotlights for APD in Lean Academy.

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!
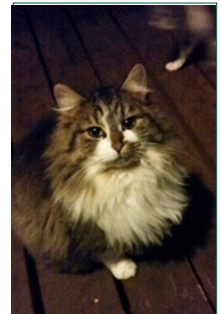
Working with our tribal partners

The definition of partnership is participation. How can you have a partnership when one party is not participating in the planning? This was the question one of the Tribal partners asked when I met him. When he asked me to help facilitate a meeting between the Tribal Title VI Coordinators and the AAA Title III Coordinators, I could not quite understand what he was seeking.

With the support of the State Unit on Aging (SUA) and APD leadership, we were able to hold a meeting of all Older Americans Act service providers in Portland last March. It was there that I understood the purpose of this request and the importance of making it happen. We had three agencies working in one region to serve older adults, with not much contact or communication between those agencies.

This was not a malicious intent, rather a fear of reaching out as cross-cultural communication was new for many state and AAA staff, and many new staff at the Tribes did not have the resources or connections to know who to contact at the state. This was one of many stories we heard at the Title VI Coordinators Meet and Greet. Once we had all staff from all organizations at the table, we began to talk about what drives us to do the work, what resources and tools we can share with one another to be more successful, and how we can have sustained interactions and partnerships with one another.

Mr. Moe Moe - Cindy Pryor, Central Office

Plans are in place to strengthen the partnerships and collaborations over the next six months, and we will be meeting twice a year moving forward. If you are interested in learning more about the Tribes in your area, or would like more information on this event, please reach out to Rebecca Arce, APD Cultural Navigator, at rebecca.e.arce@state.or.us.

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: I submitted my online to report of how many new voters cards we mailed and I never got a return email. What do I do about it?

A: I wouldn't worry about it unless it happens again next week; the return email doesn't always respond work as expected. If it continues to happen, contact Karen and we can make sure your reports are being received.

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Q: We were told to only mark the 539A if the consumers say Yes, but leave it blank if they say No then complete the 503D. Can you clarify?

A: There are two issues here: First - Every DHS approved form with the voter registration question printed on it fulfills exactly the same function as the 503D declination form. If the consumer has a DHS form such as an application, address change, or interim change report they do not need to *also* have a 503D declination; just mark the DHS form and narrate. FSAM. XIII.D.1. DHS forms as declinations

Second: Every person who has a qualifying voter registration even (new benefit, renewed benefit, or a change of address) must be asked if they want to register to vote, have their answer recorded on a form (paper or electronic), and have a narration. Yes and No responses are treated exactly the same and both must be recorded and narrated. FSAM XIII. A.3.Acting on consumer response

Q: If the month ends on a Wednesday, what do you recommend we do for reporting that week?

A: On the SEL 504 reporting form, there is a field for the date and the reporting month. Complete one report for each month in the partial reporting week and just use the same date. Details for this are on page 15 of the *National Voter Registration Act Agency Manual* from Elections.
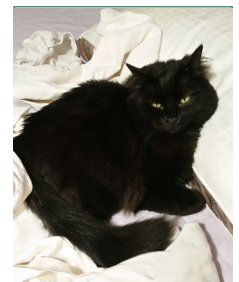
Durin - Karen Kaino, Central Office

Q: Can we set up training in our office for the summer?

A: I am working to get the training converted to an online format – stay tuned!

Q: We ordered new envelopes and they don't have a #4 on the flap. Instead they have a line and *Agency ID #*. Is that where we write #4?

A: No, please don't do that. The envelope no longer needs a #4 on it because the envelopes now have their own numbers; the 516 is always designated for your use. Please write your voter registration agency ID number on the line. If you don't know your agency number (it is <u>not</u> your branch number!), it is on the Field Services webpage.

Q: Can you send me more Spanish registration cards?

A: No, I cannot. All forms are available for ordering via the FBOS. Please connect with the person in your office who orders the rest of your forms to get any voter registration forms you need. FSAM XIII. D. Registration forms

APD 0753 update

Many thanks to **Laurie Ramberg** of Hillsboro for sending in a CI sheet to update the APD 753, *APD Long Term Community Nursing (LTCCN) Program - Client Referral*, form. The new version has space for the branch and the hone number. Please use the current version of this form available on the DHS forms server.

Accessing SNC AFH placements – The 4Ws

What you need to know before placing a consumer into a specific needs contracted adult foster home!

Do you have a consumer with high needs who wants to move out of a nursing facility into a community based care (CBC) setting and you're struggling to find placement? Do you have a consumer who is failing standard CBC settings and who doesn't want to move to a nursing facility? Maybe it's time to explore a specific needs contracted adult foster homes (SNC AFH). Here are the 4Ws of SNC AFHs:

WHAT is a specific Needs Contracted adult foster home? These providers have entered into a specific contract with the state of Oregon requiring additional staffing and services for consumers who are traditionally unable to find placement in a CBC. There are four different types of contracts which were agreed upon through the collective bargaining agreement with the AFH union: basic, advanced, bariatric, and complex ADL. There are a couple AFHs contracted prior to the CBA and those include the Windsor Place (TBI) and the Tokarski House (Hospice). Residential care facilities (RCF) and assisted living facilities (ALF) are not included in collective bargaining so each contract is negotiated separately.

- *Note: Contracts formally referred to as* basic *and* advanced dementia *have transitioned to* basic *and* advanced *with diagnosis requirement removed due to 10/1/17 OAR changes. Basic and advanced neurological will transition as contracts come up for renewal.*

WHEN would I pursue placement for a consumer in a SNC AFH? After making *several documented* attempts to place a consumer in standard CBC settings, including memory care for dementia consumers, and are unable to find a provider willing to assess and admit the consumer. Documentation should support the consumer is transitioning from a nursing facility, or diverting from a nursing facility, and have failed or are unable to access other CBC settings. If the attempts made to find placement aren't narrated there is no documentation for Central Office to confirm the consumer meets that aspect of the admission criteria.

Kai - Denise Henry, Grants Pass

The specific requirements for each contract is listed on the statement of work towards the bottom of the Specialized Services/Specific Needs Contracts webpage. Pay close attention to the sections *Care Planning Conference*, *Target Group* and, *Admissions and Discharges*. These areas describe admission process, admission criteria, description of the care needs required for admission into that specific type of SNC AFH, and expectations of the provider in the event of a discharge.

- *Note: The CAPS is required to be completed within the last 90 days and clearly reflect the care needs required by the* Target Group *for that contract.*

WHY were these contracts developed? The State of Oregon continues to be a leader in

Continued from the previous page

developing ways for our aged and disabled populations to live independently in their community. These contracts were developed to help consumers with high care needs living in nursing facilities or other institutions transition into the community.

WHERE **are these contracted homes located?** There are SNC AFHs located across the state, but the concentration of homes is located in the metro area of Multnomah, Washington, and Clackamas Counties. *Specialized Service Vacancy Reports* and can be found on the *Specialized Services/Specific Needs Contracts* webpage and on the CM Tools webpage. The report has filters to allow searching by the consumer's geographical preference and by the type of contract to meet their needs. This list is updated weekly based on the notifications providers are required to send central office (APD 492) when they have a vacancy. Staff struggling to find SNC AFHs with vacancies can call the ones which appear with no vacancies as well as those which list an actual vacancy.

Pete - Sharen Yeager, Medford

- *Providers must confirm they have a contracted vacancy available.*

Watch for next month's article on HOW to place a consumer. If you have additional questions regarding placement into contracted facilities, please first staff with your leadership team. If you have questions after staffing with your leadership please contact amy.gordin@state.or.us. Please keep an eye out for the SNC placement tool kit coming soon!

June 2018

Adopt a shelter cat month
Alzheimer's awareness month
International men's month

June 3 - 9: National sun safety week
June 11 - 17: Men's health week
June 17 - 23: Animal rights awareness week
June 24 - 30: Mosquito control week

June 1: Say something nice day
June 3: National cancer survivors day
June 13: Brain injury awareness day
June 15: Elder abuse awareness day
June 17: Father's Day
June 21: Summer Solstice
June 23: Public service day
June 27: PTSD awareness day
June 29: World scleroderma day

Verifying SSNs

Consumers cannot be required to provide a copy of their Social Security card as proof of their Social Security number (SSN); requiring those cards specifically violates the program guides and intentions. See the APD Generic Program Worker Guides, B.1. Verifying client information for verification options.

Award letters, wage stubs, tax forms, and other items may have their SSN included and can *also* be used for verification. Be careful to not limit the consumer's opportunity to verify SSN and avoid errors!

Looking for past issues of In the Loop? All newsletters, yearly indices, and a master index for everything are on the APD Field Services web page.