



# SPD Field Services:

# In the Loop

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## SPD field staff Lean focus groups a success!

During the months of October and November SPD Field Staff participated in focus group brainstorming sessions statewide. The objective of these sessions was “To identify efficiency opportunities to make field staff work easier and allow more available time to better serve SPD clients”. Twelve counties throughout Oregon participated in these sessions. A total of 316 field staff members from all classifications participated in the many brainstorming sessions. The sessions were either facilitated by local County Leadership or by SPD’s Continuous Quality Improvement Team (CQIT) with the assistance of Caryn Whatley from SPD Field Services.

During these sessions participants learned basic lean concepts and focused on the lean concepts of elimination of “waste”(unnecessary tasks) within their current work and acted to ensure “value added” tasks which benefit SPD clients remain intact.

The response from field staff was very positive. The energy level of staff participation during each session was amazing Staff brought real work issues that in their expert opinion hold “no value” to clients or staff. They came up with clear problem statements that included; the problem, why it is a problem and what the impact of the problem causes.

Participants then voted on the problems that cause the highest impact and act as the largest barrier to serving SPD clients. The votes were split evenly between local office problems and those that are outside of local office control.



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Participants actively engaged in small workgroups to solving problems voted as having the highest impact. Staff came up with many brilliant and very practical solutions along with the benefits of each improvement.

From these sessions a total of 455 problem statements were captured. As the outcomes were received, it became apparent field staff throughout the state are experiencing many of the same issues that cause unnecessary work and many frustrations to staff and clients.

The top issues were taken from the outcomes of these sessions and presented to SPD/AAA Leadership on December 8<sup>th</sup>. The response from SPD/AAA Leadership at all levels was very positive. SPD Leadership both within Central Office and within each AAA/District is taking an active role to support implementation of all improvements within their control to implement including tough questions being asked around Federal Rules and what can be done to make changes.

Leadership in both Central Office and within each District are already starting to implement improvements. An example of this was on Monday December 20<sup>th</sup> an Action Request went out to all SPD field staff that increases CAPS TIER 2 security rights for SPD/AAA local office staff. With this LEAN, value-added change it will no longer be necessary to contact the Service Desk to invalidate a CAPS Benefit with a begin date in the past. Case managers will now contact their SPD/AAA local office staff person with Tier 2 security rights to determine if a change should be made.

This is the first of many improvements that we hope to see in the upcoming months. Thank you to all SPD/AAA field staff who participated and supported the workgroup sessions. Without you, these improvements would not have been possible. Great job SPD/AAA Field Staff!

*SPD Continuous Improvement Team*

Congratulations! **Five** offices have zero citizenship discrepancies in the month of October! Great job, everyone! The superstar branches are:

0511 – St. Helens SPD – *First time – way to go!*

1015 – Reedsport SPD – *TENTH time this year*

1311 – Burns SPD – *Sixth time this year!*

3013 – Hermiston SPD - *SIX months in a row!*

5517 – Children’s Medical Unit - *SIX months in a row!*

Want suggestions on how your branch can eliminate citizenship discrepancies and join the superstars? Contact [Karen Gulliver](#) for ideas.

## January 2011

Bath safety month  
Quality of life month

Jan 1 - 7: Celebration of life week

Jan 16 -22: Healthy weight week

Jan 1: New year’s day

Jan 4: World Braille day

Jan 10: Cut your energy costs day

Jan 15: Humanitarian day

**Jan 17: Martin Luther King Jr Day -  
CLOSED**

Jan 22: Answer your cat’s questions day

Jan 27: Holocaust memorial day

Jan 29: Seeing-eye dog day

# Train the Trainer

## Train the Trainer (TTT) highlights

Below are some of the highlights from the December 2, 2010 Train the Trainer (TTT) meeting. More is discussed in the meeting, so please regard this as *only* the basic information.

For more information on these issues or any others, please contact the SPD Policy Analysts. To find out more about the TTT meetings, contact [Lauren Mitchell](#).

### SNAP NED clarifications:

- If the client case suspended incorrectly – the case was not coded NED when it should have been – the case should be reopened back to the date it closed without pending for an 852.
- If the case suspends incorrectly and the client turns in an unnecessary 852 and the information on the 852 is verified the worker must act on the verified information. If eligible, the case can be reopened back to the date it was closed in error.
- **Disregard any contradictory information on NED previously published in any format.**
- There is a [Skills Challenge](#) on the [SNAP web site](#) specifically addressing NED which will help clarify some of these points.



**Emergency Assistance (EA) issues:** send questions or issues to [Joanne Schiedler](#). Be sure to include the case number.

**CBI and SMI:** See *Worker Guides QMB2, 3, 4 and 5* for updated CBI information.

- **CBI** - Use the amount on the TPQ screens, NOT the MMIS amount. The TPQ screens have the amount the client owes if they are paying through a deduction in their SSD/B check. That's the amount they will pay when removed from buy-in, so it should be their CBI amount. The amount on MMIS is the amount the state pays for them – the state pays more than the client does.
- **SMI** - used to appear in the upper part of the N/R box on ACCESS in some instances when Part B Medicare is selected. This apparently resulted in some workers thinking it should be used for the client involved. This was not necessarily the case. Because of this, SMI will no longer automatically appear in the N/R list. SMI should only be used for two months and only for NFC cases, if needed by the client to pay their Part B premium while awaiting buy-in. Many clients in NFCs have resources and can pay the premium amount until they get the refund check from SSA, and so will not need the SMI at all.

**LIS cases** prior to November will be worked at Central office starting with the oldest cases and working forward; the field is asked to concentrate on November forward. Contact [Dale Marande](#) with questions.

- Persons currently receiving Medicaid benefits or who have been denied in the last 90 days can be deleted from the list using the “C” code. *(Continued next page)*

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- Central office workers will send a letter to potential eligibles with the local office phone number, add a pending OAccess case and narration, and integrate with the CM system.
- Cases which require major fixing will be left on SLIQ.

**Separated spouses/Resource assessment:** Federal law and Oregon rules require applicants who state they are married but separated from their spouse to be treated as a married person and not as a single person as is current practice in some areas. Contact [Bill Brautigam](#) with questions.

- “Common law” spouses are regarded as single unless they lived in another state with the common law spouse long enough to qualify for common law marriage under that state’s law prior to moving to Oregon.
- Federal law does not recognize same sex partnerships as “marriages”, so individuals in a same sex union are regarded as single.
- Reasonable action must be taken to determine the identity, whereabouts and resources of the separated spouse prior to determining eligibility. All available assets must be pursued.
  - If the missing spouse cannot be located, the worker should gather as much information about them as possible and carefully narrate their findings and the situation.
  - Do not narrate the separated spouse is not financially responsible.

**MMIS computer based training:** Look for a computer based training on using the Special Conditions panel soon! After taking this training, workers can be given rights to update exemptions themselves in the MMIS system.

## **MWP**

The Making Work Pay (MWP) Tax Credit, also known as the American Recovery and Reinvestment Act (ARRA) tax credit, will be eliminated effective January 1, 2010. The law that created the credit will sunset at the end of 2010.

This means the \$33 exclusion that was used to determine countable income for Medicaid eligibility and for liability determination will now be gone for anyone applying on or after January 1, 2011. For cases where the MWP tax credit is already being used, staff can adjust eligibility and liabilities/Participant Fees when cases come up for redetermination in 2011.

If you have questions, please contact Jeff Stell, SPD Medicaid Program Analyst, at (503) 945-6834, [jstell@dhs.state.or.us](mailto:jstell@dhs.state.or.us).

## **Brush up your SNAP skills!**

Looking for a way to brush up on SNAP without attending a class? Try SNAP Skill Challenges! Located on the [SNAP web tools](#) page under the Skill Challenges link, or directly: <http://www.dhs.state.or.us/training/foodstamps/skillchallenge.htm>.

Don’t forget to check out the other great resources while you’re there like the SNAP calculator, self-employment cheat sheets, links to the Oregon, Washington, Idaho and California business registries and a lot more!



# Transformation

## Metric fundamentals

*Last of a series*

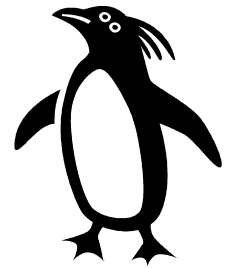
What's measured improves. ~ Peter F. Drucker

### Balanced Scorecard

Look at the dashboard of any car. You will notice a variety of indicators and measures communicating the status of the car. Speed, distance (odometer), fuel, and temperature are just a few. We use this information to assure safe operation of our car and successful trips to our various destinations.

This is the last of a series on metric fundamentals. Thus far we've explored tracking a workgroup's outcomes/output, the time it takes to produce this outcome/output, along with the quality of our process by tracking the frequency and types of rework. Finally, we looked at tracking how satisfied our customers or clients are with the outcomes/outputs of our processes.

These measures form what is frequently referred to as a "balanced scorecard" of productivity (cost), service, quality, and people, encouraging us to keep a balance of what is important. The intent of this series is to provide workgroups with starting points or ideas for metrics.



Choose measures that are important to the team, communicate success, reveal improvement opportunities, and track the condition of a process. The best measures are simple, m measurable, achievable, results oriented and timely (SMART).

"For me, goals and daily metrics are the key to keeping me focused. If I don't have access to the right stats, every day, it is so easy for me to move on mentally to the next thing. But if I have quick access to key metrics every day, my creativity stays within certain bounds—my ideas all center on how to achieve our goals." ~ Paul Allen, Microsoft co-founder

"When people are pressured to meet a target value there are three ways they can proceed:

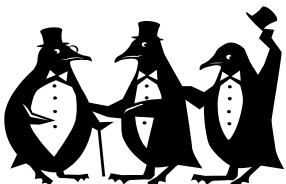
1. They can work to improve the system.
2. They can distort the system.
3. Or they can distort the data."

For the sake of those dependent upon our services, always choose number 1.

Contact us at: [CQIT.SPD@STATE.OR.US](mailto:CQIT.SPD@STATE.OR.US)

CQIT Web site:

[http://inside/index.php?option=com\\_content&view=frontpageplus&Itemid=344](http://inside/index.php?option=com_content&view=frontpageplus&Itemid=344)



*There will be no 2011 Cost of Living Adjustment (COLA) in 2011. This means people who receive social security benefits will experience no automatic increase of those benefits in 2011.*

# SNAP honor roll

## Congratulations SPD

Because of increasing baby boomer pressure and enhanced outreach the Medicare Part B costs to SPD have been rising about 1% every month. In November this amount started to dramatically change. This is thanks to incredible efforts on the part of the field and central office to implement the CBI project.

November expenditures of unmatched general funds dropped significantly and in December they dropped even more. Sincere thanks to all of you who have helped and continue to help in this effort.

*Dale Marande, SPD Medicaid analyst*

## SNAP policy box!

Just a reminder...If you have questions for a SNAP policy analyst, please make sure you are using the [SNAP.Policy@state.or.us](mailto:SNAP.Policy@state.or.us) or *Policy,SNAP* address in GroupWise. This address replaced the old FS Policy address back in June.

For those of you using the old [FS.Policy@state.or.us](mailto:FS.Policy@state.or.us) or the old *Policy,FS* in GroupWise – this e-mail address will be inactivated effective January 1. We still get multiple e-mails per day forwarded from the old address.

So please remember, to get an answer in a “snap”, ask us at [SNAP.Policy@state.or.us](mailto:SNAP.Policy@state.or.us) or *Policy, SNAP* in GroupWise.

## November 2010 SNAP honor roll

### 100% Accuracy!

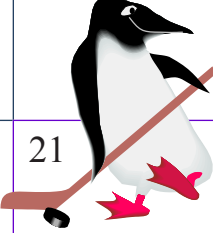
0314	Estacada SPD	100%	1612	Madras SPD	100%
0511	St. Helens SPD	100%	1811	Klamath Falls SPD	100%
0913	LaPine SPD	100%	1911	Woodburn ADS	100%
1017	Roseburg DSO	100%	2111	Toledo ADS	100%
1311	Burns SPD	100%	2911	Tillamook ADS	100%
1418	Portland South East ADS	100%	3112	Enterprise SPD	100%
1611	Prineville SPD	100%	3411	Hillsboro SPD	100%

### 90% or Better Accuracy!

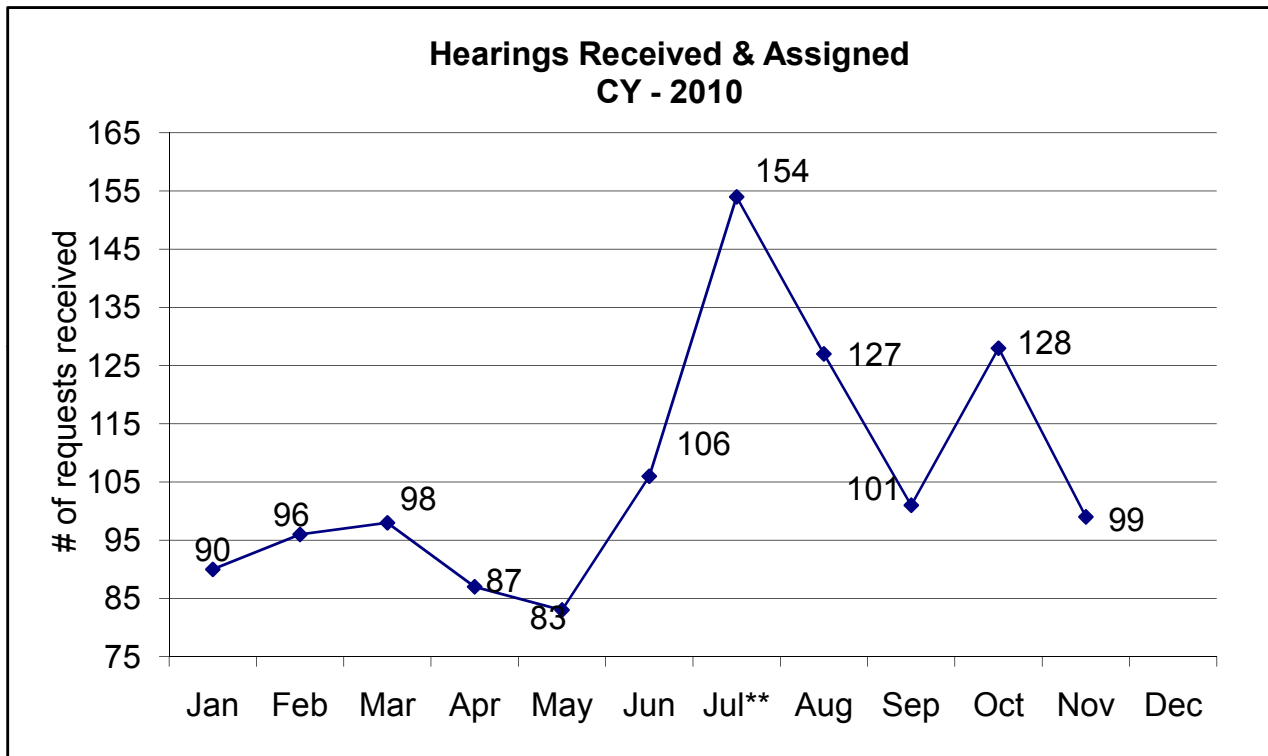
2211	Albany ADS	97.44	2019	Cottage Grove AAA	93.33
0914	Redmond SPD	96.00	2711	Dallas ADS	93.33
1513	Medford SSO	96.00	3011	Pendleton SPD	93.33
2411	North Salem ADS	96.00	3013	Hermiston SPD	93.33
0911	Bend SPD	94.44	3311	The Dalles SPD	93.33
0111	Baker SPD	93.33	0313	Milwaukie SPD	92.86
0310	Canby SPD	93.33	3515	Portland ADS	92.31
0311	Oregon City SPD	93.33	2518	Portland West ADS	92.00
0411	Warrenton ADS	93.33	3617	McMinnville ADS	92.00



## January 2011 training calendar

Monday	Tuesday	Wednesday	Thursday	Friday
3	4 Basic Lean tools (8:30 - 4:30)	5	6	7
10	11 Eligibility 101 (8:30 - 4:30) Oregon Access basics (8:30 - 4:30) MMIS data inquiry & update (1:30 - 4:30)	12 Eligibility 101 (8:30 - 4:30) Oregon Access basics (8:30 - 4:30) MMIS data inquiry & update (1:30 - 4:30)	13 Eligibility 101 (8:30 - 12:00)	14 MMIS data inquiry & update (8:30 - 11:30)
17	18 Cultural competency & diversity (8:30 - 4:00) eXPRS user lab (1:30 - 4:30)	19 Cultural competency & diversity (8:30 - 4:00)	20 Cultural competency & diversity (8:30 - 4:00)	21 
24 APS report writing (1:00 - 4:30)	25 APS report writing (8:30- 4:30)\ MMIS data inquiry & update (1:30 - 4:30) Advanced eligibility calculations and trusts (8:30 - 4:00) Advanced Lean tools (8:30 - 4:30)	26 APS report writing (8:30- 4:30) MMIS data inquiry & update (8:30 - 11:30) MMIS plan of care for SPD case managers (1:30 - 3:30) Employed persons with disabilities (8:30 - 4:30)	27 APS report writing (8:30- 4:30) Presumptive Medicaid training (8:30 - 4:30)	28
31			<p><i>Dates and availability of classes are subject to change. Please review availability on the <a href="#">DHS Learning Center</a>.</i></p>	

# Hearings



	Food Stamps	Medicaid eligibility	Over-payment	PMDDT	Services	Other	DD case	UI
January	11	15	18	25	13	3	5	13
February	15	22	17	19	19	1	3	8
March	19	19	11	25	18	4	2	7
April	19	30	7	14	14	2	1	5
May	22	15	7	15	18	3	3	13
June	11	23	13	28	25	3	3	10
July	18	20	9	26	25	2	2	7
August	17	47	6	20	26	2	8	14
September	19	26	8	19	18	1	10	12
October	19	29	10	25	27	6	12	10
November	15	21	5	20	19	3	16	10

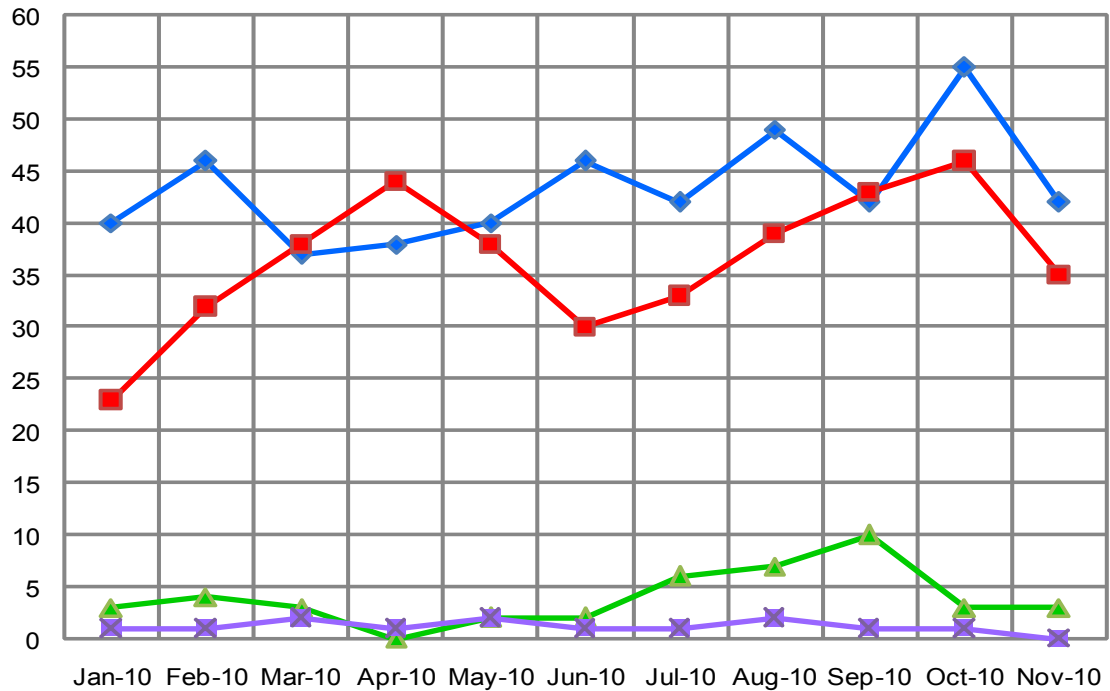
## Central Office Field Services team

Angela Munkers - Field Services Manager  
 Sandy Hata - Transition Services Manager  
 Carol Mauser - Operations Manager  
 Jennifer de Jong - SPD Modernization  
 Program Business Transition Manager  
 Caryn Whatley - Policy Analyst  
 Heather Williams - Training and  
 Development Specialist

Debbie Harms - Executive Support  
 Nathan Singer - Transition Services  
 Karen Gulliver - Quality Assurance  
 Janet Morse - Administrative/Technical  
 Assistant and Hearings Coordinator  
 Tammy Mazon - SNAP Outreach/ OSH  
 Financial Eligibility

# Exceptions

## Exception requests - 2010



	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10
◆ AFH	40	46	37	38	40	46	42	49	42	55	42
■ In-home	23	32	38	44	38	30	33	39	43	46	35
▲ RAFH	3	4	3	0	2	2	6	7	10	3	3
✕ RCF	1	1	2	1	2	1	1	2	1	1	0

### Updated 223

The DHS 223, *Proof of Eligibility* form has been updated to reflect the changes in OHP income verification. The form is available on the form server and gives options for clients who need to bring proof of identity, income, citizenship or alien status and expenses.

This is a highly recommended form – it can assist clients tremendously and is an excellent guide for workers on the types of verification they should be looking for and requesting.

If your area is using a “home grown” form, please toss it out and use the DHS 223 instead.



### Don't forget

– When a client is self-employed and has SNAP, remember to annualize the income if it is received over a few months but intended for 12 months or if it is representative income from a business which has been operating for at least a year. See [461-145-0910](tel:461-145-0910) for more information or contact a SNAP policy analyst.

# Modernization

## Modernization project gets a new name!

*Heather Williams, Business Transition Coordinator/Trainer*

Are you ready for an exciting announcement? Self Sufficiency Modernization has been renamed DHS Modernization! What? Is that not exciting?? No? Well, at the very least we hope it will help keep you engaged in what Modernization has in store for both you and DHS clients.

If there is one constant in our work, it is change. Sometimes it feels like adapting to change is the *only* work we do - policy changes, procedure changes, staffing changes, system changes... does it ever end? We know all too well the answer is no, it never ends. Sometimes the best we can hope for is that the changes will provide some measure of relief, something new that produces a positive outcome rather than more confusion and chaos. You know - something that will make our jobs just a little bit easier, is that too much to ask? I personally don't think so. We want to let you know that the Modernization Business Transition team is here to listen to your concerns and make sure that the field is heard through this process. Talk to us! I have high hopes for what DHS Modernization will do for us and I hope that some of my optimism and excitement will find its way to you.

We would also like to let you know about a contest to rename the online application web site link – currently potential applicants must type in a very long web address in order to access the online application web site. We would like to name it something that is not only easier for our clients to remember (e.g. insertyourideahere.com), but which also relates to what it is – another way to access much-needed services. WE NEED YOUR HELP! E-mail your ideas to the Business Transition Team by January 15 at [ssm.program@state.or.us](mailto:ssm.program@state.or.us).

*Note: Eventually the online application will include other programs such as medical benefits, TANF, and ERDC, so your chances of winning will be greatly improved if you do not include the words 'SNAP' or 'food' in your entry.*

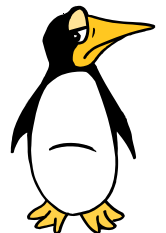
October's issue of the *On the Horizon* newsletter was amazing! You can find the current issue as well as past issues on the Modernization web site, but for now, please enjoy the following articles from the Business Transition team:

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### The business side of life: Did you know?

Dear Oregon,

Do you know what DHS Modernization has in store for you? There are actually a variety of projects on the shelf, including the Online Application, CAPI, Eligibility Automation, Telephony and Mainframe updates! Not only are we looking to provide additional resources and outreach for clients with the Online Application, but we're also looking to provide timely and user friendly resources for you!



What is Modernization? And how do we plan to do that? Modernization is a program (established to improve delivery of services to Oregon.

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Our team has just completed a vendor fair to see what Eligibility Automation can do for you. Yes, YOU! We are now engaged in informational interviews with other states, focusing on the best practices and lessons learned. These activities will help us make the best decision in how we move forward with this project. This could include calculations and benefit determination.

In addition to Eligibility Automation, we are also conducting a Telephony *[tuh-lef-uh-nee]* Assessment on our current phone system to determine what capabilities it has and how we can use that technology to our advantage to help reduce workload.

Our last project is by far our biggest challenge! Our plan is to reduce our reliance on the current 'outdated' Mainframe systems by implementing new technology.

*Courtney Hill, Business Transition Coordinator*

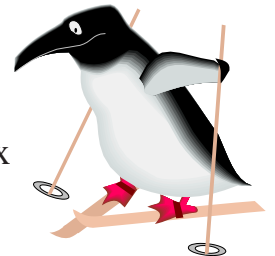
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## CAPI and online application sandbox

Do you want to practice your CAPI skills? Interested in seeing exactly what the clients are filling out when they apply for SNAP benefits? Wait no longer!!! The sandbox is now available for staff to use!!! Below are the instructions for how to access the sandbox:

**Online Application Training Site** <https://apps.state.or.us/onlineAppTrnR2/>

- Create an account of your own.
- When completing an application, use the zip code **11111**.
- If you make a filing group member 60 or older or an adult member disabled, the application will be routed automatically to the SPD Sandbox branch. *Note: adding children, regardless of disability, will cause the application to be routed to the SSP Sandbox branch.*



**CAPI Training Site** <https://apps.state.or.us/capiTrnR2/>

- Username: student01 \*You may use student01 thru student49
- Password: password1
- Branch: SANDBOX TRAINING SSP (0000) \*select from the drop down list; or
- Branch: SANDBOX TRAINING SPD (0001) \*select from the drop down list

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## The modernization web site is here!

**Just click:** <http://www.dhs.state.or.us/modernization/>. Also available through the SSP/SPD Staff Tools pages.

- Keep up on new developments
- Learn more about Modernization Telephony
- Check out the different Branch Tools
- See what branches are currently using CAPI