

June 2010

SPD Field Services: *In the Loop*

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Leadership and the budget

Carolyn Ross
Field Services Manager

In my 22 years with DHS, we have experienced budget shortfalls and surplus. As you all have noticed, this is a time of shortfall and it looks to be pretty bad for SPD. But, this is also a time for leadership within SPD.

SPD is very committed to the Leadership Model. In that model, we look at accountability. With major budget reductions on the horizon, it will be more important than ever to look at our costs and take responsibility for our actions. We will need to do more with less and that takes leadership at all areas of the organization. It is very easy to be unhappy during a time of cuts, but now more than ever we all will need to be leaders.

We all will need to be clear in our communications. As many of you know, nothing is a done deal as of yet. For most of the SPD cuts, we need CMS approval. CMS is our federal partner and they often take at least 90 days to approve any changes to our state system. I will do my best to make sure that all of you are notified as changes occur.

We all must contribute our knowledge and skills to assist others during this stressful time. We are all a part of many teams and we will need to be open for many ideas and work hard to manage any conflict that can happen in stressful times.

So, let's all do this together and remember that SPD is such a special place to work because of the clients that we serve. Everyday, we get to make a difference in other's lives and we will do that whether the budget is robust or slim. We need to continue doing the great work that we are known for across the United States and support each other.

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

Quality assurance

Citizenship – remember to code!

Just over a year ago (April 2009), DHS began allowing clients who are otherwise eligible for medical benefits and who declare US Citizenship to be opened before the citizenship documentation is received. See [SS-PT-09-015](#).

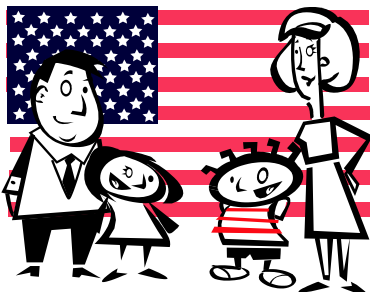
The policy was great for our clients, but required a change in the way some AAA/SPD/DSO branches operated. For instance, the new policy requires each person who is receiving medical prior to documenting their citizenship to receive a pending notice – not a verbal pend, not a note asking for the documentation – and to be coded with a *CIP* code and due date on the system.

The *CIP* code tells system the client still needs to provide citizenship documentation but that action has been taken to get it. The due date is a minimum of 45 days plus time for a 10-day notice. If the client needs more time to provide the documentation, the due date can be changed with a *CIE* code, a new pending notice and a new due date in the system.

Adding and using the pending codes is an extra step up front which will save work at the other end. Adding a *CIP* and pending will prompt the system to send a notice to the client reminding them to get the documentation to their worker before the deadline to keep their medical open – you don't have to track it. The coding will also allow the system to send a closing notice automatically if the client fails to respond to the pending notice.

Should the case transfer out of your office during the pending period, the worker who receives it will see the *CIP* or *CIE* and know at a glance what is happening with the case. And, if the client dies before they are able to provide the documentation, the code and correct date will eliminate the need to “fix” the citizenship after the fact – it's covered!

The citizenship pending codes – and the pending notice – are required, but they are also helpful for everyone. If adding the codes is not something you normally do – get in the habit! You will help your clients, yourself and have fewer discrepancies to fix!



Don't forget! SNAP clients who receive periodic income must be given a choice of how the income is counted. The client can choose to count the periodic income only in the month it was received, or to spread it over the time for which it is intended. Be sure to narrate what the client decides and take appropriate action!

SNAP

New SNAP web tools

The [SNAP web site](#) has new desk tools for self-employment which are almost guaranteed to make determining the client's income easier.

For ongoing self-employment where client files taxes, use the *How to Read a Tax Form* cheat sheet to find out where to look on which tax form to get the real self-employment income total.

Clients who are new or more challenging may be easier to handle with the *Staff Use Self-Employment Questionnaire*. The *Questionnaire* is a single page for the worker to use with the client to answer basic questions about their business and determine if the client is really self-employed.

There are a lot of great links to help with your SNAP (the Work Number, business registry sites, etc) – check it out!



May 2010 SNAP honor roll

100% Accuracy!

0411	Warrenton ADS	100%	2311	Ontario SPD	100%
0511	St. Helens SPD	100%	2911	Tillamook ADS	100%
0911	Bend SPD	100%	3011	Pendleton SPD	100%
1311	Burns SPD	100%	3013	Hermiston SPD	100%
1611	Prineville SPD	100%	3112	Enterprise SPD	100%
1811	Klamath Falls SPD	100%	3211	Florence AAA	100%
2019	Cottage Grove AAA	100%	3411	Hillsboro SPD	100%
2111	Toledo SPD	100%			

90% or Better Accuracy!

0914	Redmond SPD	96.00	0313	Milwaukie SPD	93.33
1418	Portland Southeast ADS	96.00	1911	Woodburn ADS	93.33
2518	Portland West ADS	96.00	3415	Tigard SPD	93.33
3617	McMinnville ADS	96.00	3515	Portland ADS	92.50
2011	Eugene LCOG	95.00	1017	Roseburg DSO	92.00
2211	Albany SPD	95.00	1717	Grants Pass DSO	92.00
0111	Baker City SPD	93.33	2411	North Salem ADS	92.00
0310	Canby SPD	93.33	3417	Beaverton SPD	92.00
0311	Oregon City SPD	93.33	3111	LaGrande SPD	90.91

Apologies to Pendleton 3011 for getting left off the May list - they had 93.33!

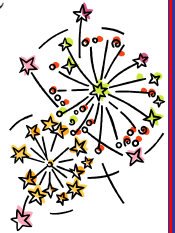
Policy

Employment and People with Disabilities

Did you know people who are employed can be eligible for medical benefits from DHS, including OSIPM and QMB? Many people think working people with disabilities must earn less than \$675.70 per month in order to be eligible for medical benefits, but that is not the case. In addition to regular OSIPM and other DHS medical programs, DHS also has another OSIPM program specifically for working people with disabilities called the Employed Persons with Disabilities (EPD) program.

In the EPD program, people can earn and save more money than they can in the regular OSIPM program, and have “wrap-around” insurance if their Medicare or their employer-sponsored health insurance does not cover all of their medical needs. Here’s how it works. In the EPD program:

- A client must be employed to be eligible for EPD. “Employed” means the client is working and FICA is being withheld from their pay, or they are self-employed.
- All unearned income is excluded for EPD eligibility. This is different from the regular OSIPM program, which counts all countable unearned income minus \$20.
- Any client with disabilities earning less than **\$4,599** per month will meet the income requirements for EPD. But the good news is that **\$4,599** is not a countable income limit! Many clients earning income higher than **\$4,599** may still be eligible if they have disability-related employment expenses.



Other features of the EPD program include:

- Resources: instead of the \$2,000 resource limit in the OSIPM program, EPD has a resource limit of \$5,000. Clients may also choose to put money into special accounts called “Approved Accounts”. Approved Accounts allow clients to save money toward retirement or disability related expenses. Money in Approved Accounts does not count toward the EPD resource limit.
- Coverage: Clients in the EPD program will get OHP Plus medical coverage and access to waived services if eligible.
- Participant Fee: EPD clients have a monthly payment, called a Participant Fee that they must pay in order to be eligible. Usually the Participant Fee is \$100, but can be as high as \$150.

Many clients with disabilities want to work. If you have a client who is interested in going to work, but does not know where to start, you can refer them to the Work Incentives Network (WIN) coordinator, who can get them started. WIN information can be found on the DHS website at: <http://www.win-oregon.com/>

SPD/AAA staff determine the eligibility for EPD, and SPD/AAA offices carry all EPD cases. However, SSP staff can refer working clients with disabilities who could be eligible for EPD to the local SPD/AAA office to apply for EPD. For more information about the EPD program, please see the SPD EPD Worker Guide, found at: <http://www.dhs.state.or.us/spd/tools/program/osip/wg11.htm>

Jeff Stell, SPD Medicaid Program Analyst

July 2010 training calendar

Monday	Tuesday	Wednesday	Thursday	Friday
5 CLOSED	6 	7 New Employee Orientation (8:00 - 5:00) Netlink: CAPS Assessment & Service Planning Upgrade (8:30 - 11:30)	8 Cultural Competency & Diversity in DHS (8:30 - 4:30)	9
12	13 Eligibility 101 (8:30 - 4:30) SPD Quarterly Field Supervisor's Training (8:30 - 4:30)	14 Eligibility 101 (8:30 - 4:30) MMIS Data Inquiry & Update (8:30 - 11:30) Netlink: CAPS Assessment & Service Planning Upgrade (8:30 - 11:30)	15 Eligibility 101 (8:30 - 12:00) MMIS Plan of Care (1:30 - 4:30) MMIS Managed Care for Case Workers (1:30 - 4:30) Netlink: CAPS Assessment & Service Planning Upgrade (8:30 - 11:30)	16
19 Netlink: CAPS Assessment & Service Planning Upgrade (8:30 - 11:30)	20 Oregon ACCESS Basics (8:30 - 4:30) Advanced In-Home Service Planning (8:30 - 4:30) Writing a Good Decision Notice - Netlink (1:00 - 4:00) DHS Core Values (8:30 - 12:00) Strengthening Case Management Module 1 (8:30 - 4:30) MMIS Managed Care for Case Workers (1:30 - 4:30)	21 Oregon ACCESS Basics (8:30 - 4:30) Advanced In-Home Service Planning (8:30 - 4:30) MMIS Managed Care for Case Workers (1:30 - 4:30) MMIS Data Inquiry & Update (8:30 - 11:30) Netlink: CAPS Assessment & Service Planning Upgrade (8:30 - 11:30)	22 MMIS Plan of Care (1:30 - 4:30)	23
26	27 CAPS Basics (8:30 - 4:30) MMIS Plan of Care (8:30 - 11:30) MMIS Plan of Care (1:30 - 4:30)	28 CAPS Basics (8:30 - 4:30) MMIS Recipient Eligibility Data (8:30 - 11:30)	29 Strengthening Case Management Module 1 (8:30 - 4:30)	30

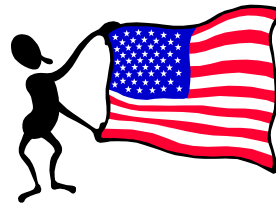
Dates and availability of classes are subject to change. Please review availability on the [DHS Learning Center](#).

Training Opportunities

CAPS Service Planning upgrade training

A Netlink training for the OACCESS CAPS Assessment and Service Planning Upgrade, featured in the July 2010 OACCESS release, is being offered through the [Learning Center](#) for the following dates:

- July 7, 2010, 8:30 - 11:30
- July 14, 2010, 1:00 - 4:00
- July 15, 2010, 8:30 - 11:30
- July 19, 2010, 1:00 - 4:00
- July 21, 2010, 1:00 - 4:00



This Netlink training is being offered to demonstrate the following CAPS Assessment and Service Planning changes:

- Some minor changes to the assessment results screen.
- Hours Authorization has been separated from the Hours Assignment screen. The new Hours Authorization will allow the user to authorize allowed hours and submit exception hours.
- Security levels for approval of hours.
- New Action buttons for each level of Service Planning. These buttons will replace the existing Perform an Action button.
- Modeling of the new hours segment.

July 2010

Cell Phone Courtesy Month
Parks and Recreation Month
Wheelchair Beautification Month

July 4 - 10: Freedom Week
July 18 - 25: RLS Education Week

July 3: Stay Out of the Sun Day
July 4: Independence Day

July 5: State offices CLOSED

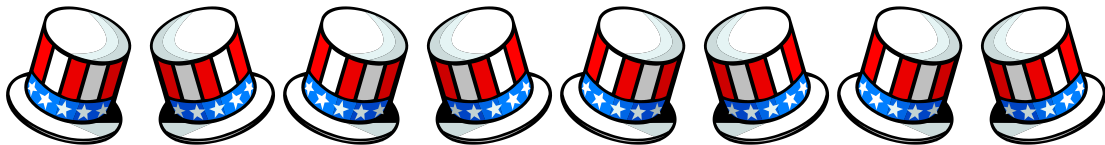
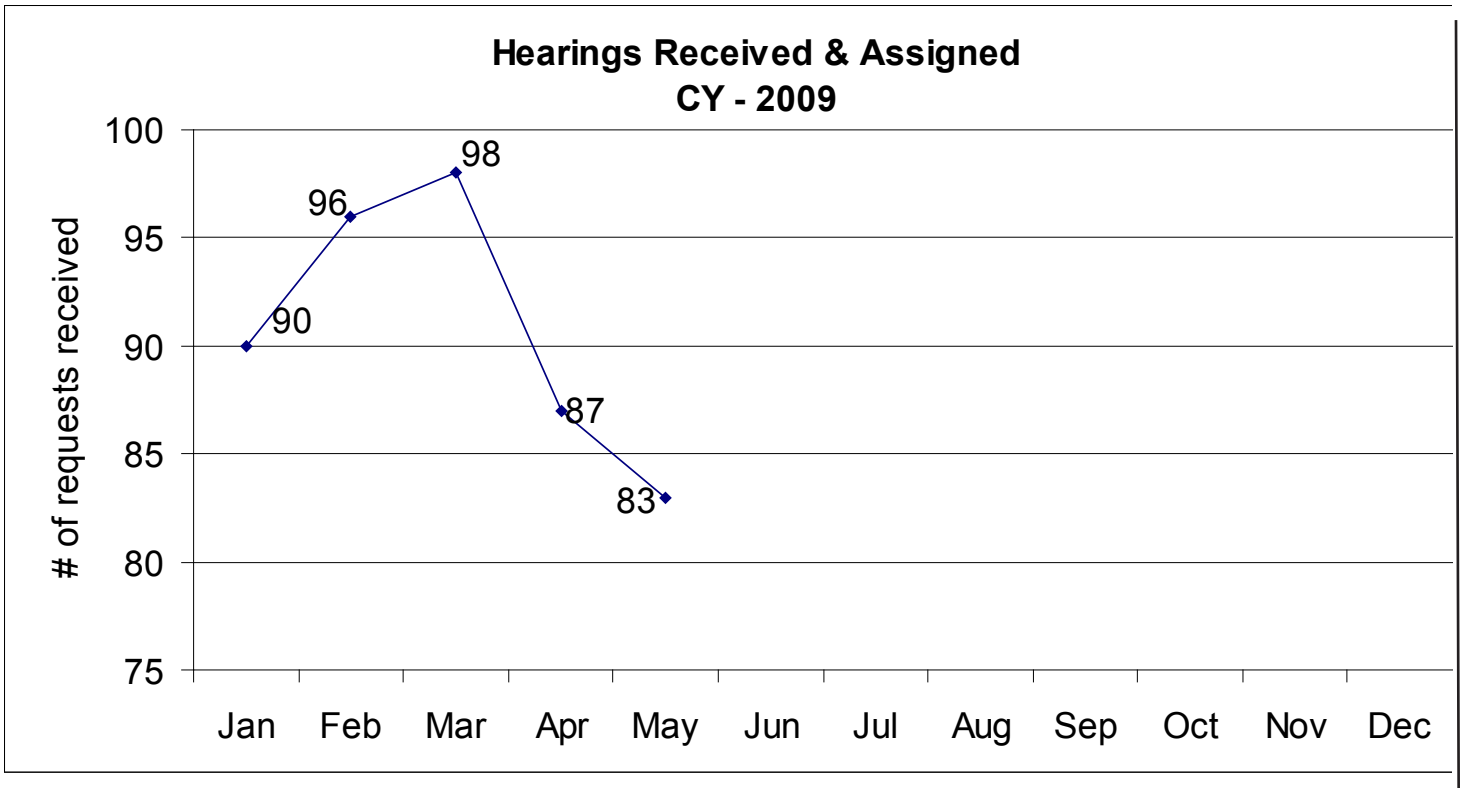
July 8: Savor the Comic, Unplug the Drama
July 13: Embrace Your Geekness Day
July 23: Gorgeous Grandma Day
July 30: Father-in-Law Day



Congratulations! The number of cases on the monthly Alternate Format discrepancy report continues to shrink! June had a total of only 12 people who needed their case reviewed. Our workers continue to do excellent work under tough conditions - thanks for all you do!

Hearings

	SNAP	Medical	Ovrpmt	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

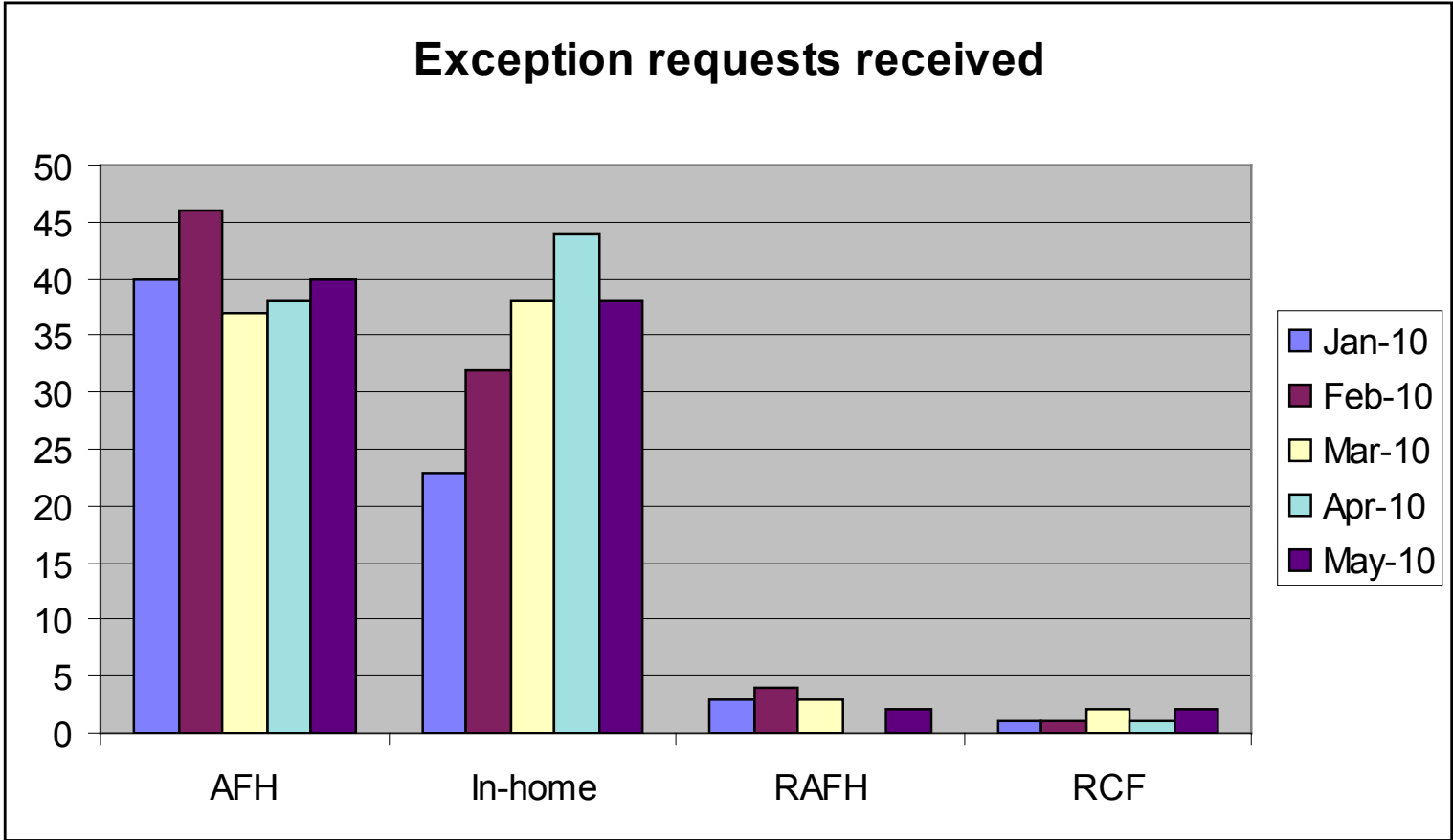


Central Office Field Services team

Carolyn Ross - Field Services Manager
 Sandy Hata - Transition Services Manager
 Carol Mauser - Operations Manager
 Donna Weaver - Operations Manager
 Jennifer de Jong - SPD Modernization
 Program Business Transition Manager
 Debbie Harms - Executive Support

Caryn Whatley - Hearings Policy Analyst
 Nathan Singer - Transition Services
 Karen Gulliver - Quality Assurance
 Janet Morse - Administrative/Technical
 Assistant and Hearings Coordinator
 Tammy Mazon - SPD SNAP Outreach/
 Volunteer Coordinator

Exceptions




In-Home exceptional hour requests - things to remember

An “exception” is a request of service hours above those allowed by the maximum hours of service as described in [OAR 411-030-0070](#). The approval is based on the service needs of the individual and is contingent upon the service plan meeting the requirements.

Please complete the service planning section of the CAPS assessment indicating how you wish to authorize the hours. This screen should be left in pending status.

When completing the Community Based Care Costs section of the 514 please indicate the assessed and requested hours for in home services. The assessed hours are from the assessment and the requested exceptional hours are the total number of hours requested for the plan.

For more information, see the [Guide to Exceptions](#).



Exception request tip!
Please remember to state in the email subject line whether exception is for AFH or In-Home.

Revised forms

The following forms have been revised:

The word version for the **287A** (underpayment) and **287B** (overpayment) *CEP and In Home Care Agency Adjustment Request* has been posted to the form server.

This form now includes procedure codes for In Home Care Agency.

Quality Assurance

Tribal timber revenue

Determining income from tribal capita income is challenging for most workers and timber sales income can be particularly problematic in the SNAP program because sometimes it's counted and sometimes it's excluded.



When the per capita payments for timber sales are from lands held in trust for the tribe by the Secretary of the Interior, all of the income from that sale is *excluded*. When the sale is not on federally held lands, the income is countable as either periodic or lump sum income.

If the tribal timber income is anticipated to continue or reoccur, the money is countable **periodic** income. If the client only receives the income once and it is *not* anticipated to reoccur, treat the payment as **lump sum** income.

The most reliable way of determining if the timber income is from federally held lands is to contact the tribal office. The tribe will know if the per capita payment is from the land held in trust (the client may not) and may be able to fax or mail a Member Benefits letter to explain per capita income and its source.

For more help with tribal income, see [Counting Client Assets](#) or contact the [SNAP policy analysts](#).

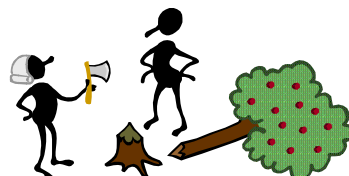
Statewide Quality Assurance plan – coming soon!

SPD will soon be piloting a Quality Assurance plan with the intention of going statewide in the next 12 months. The plan will include monitoring work with Diversion/Transition, Adult Foster Homes, Adult Protective Services, Case Management and Eligibility.

The pilot areas will have an opportunity to write and implement a local Quality Assurance plan using some basic expectations as guidelines and carry it out for six months with Central Office on hand to help. Feedback from the pilot offices will be essential in expanding statewide.

Based on results from the limited pilot, changes may be made to the proposed plan. For instance, if something essential was overlooked or expectations need to be adjusted. We want to be sure the Quality Assurance plan is the right one for our clients, our workers and our current climate.

Keep watching for more information in upcoming newsletters. Updates will appear in the newsletter as they are available.



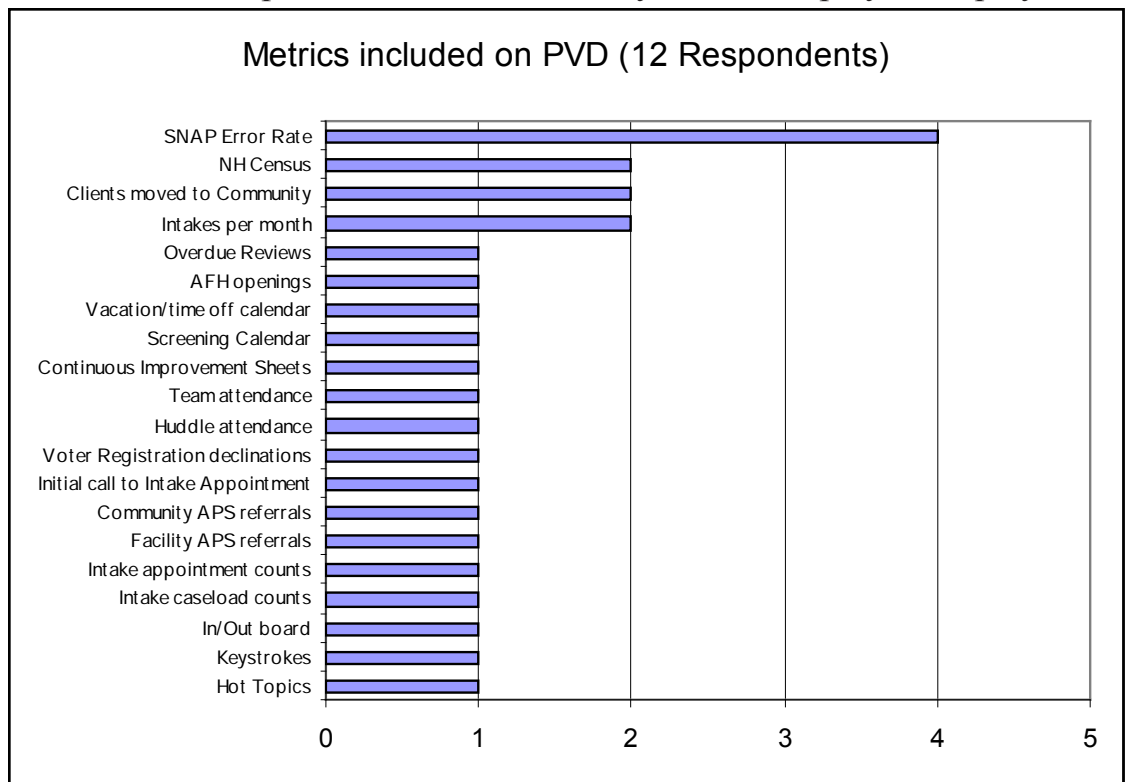
Transformation

Huddles are a “Hit!”

During the first two weeks of May, managers throughout SPD participated in a survey on various aspects of the Lean Daily Management System to determine how the training they received as Lean Practitioners had been implemented. Of the 25 managers responding, 21 reported having regular “Huddles” with more than half reporting they have more than one workgroup with huddles! Of those managers having huddles within their workgroups, 56% have them on a daily basis!

Huddles are more than just another meeting. Nearly all of the managers reported these huddles as improving communication and supporting continuous improvement. They also reported huddles as providing an opportunity to prioritize workgroup efforts, clarify expectations, and celebrate successes.

Workgroups with an established huddle practice include a Primary Visual Display to display what’s important to the team such as communications, hot topics, and kudos. Again, half of the managers report having advanced to the inclusion of a Primary Visual Display for their huddles. This is great as vital information to the team becomes easily visible and available.



Included on many of these Primary Visual

Displays are “metrics” easily communicating critical measurements being tracked by the team. The most frequently reported metrics included SNAP error rates, nursing home census, clients moved from nursing homes to community placements, and the number of intakes. Great job!!!

Watch in coming weeks as DHS provides additional training and encouragement to implement this approach to improve communication and team involvement in process improvement.

Contact CQIT at CQITSPD@DHS.STATE.OR.US for more detailed results from the survey. Send us pictures of your huddle groups and primary displays for inclusion in future newsletters, too!

Transformation

Modernization update

I am pleased to announce that Heather Williams has accepted the position as the SPD Trainer for the project. You may have known her in her role as a Hearings Representative for SPD. It is exciting to have her on the project - she is going to be a great support and resource for field staff as we roll out the Online Application and CAPI.

NWSDS Expansion: The point staff at NWSDS were trained on the Caseworker Application Processing Interface (CAPI) on June 17th. These staff were trained on how to assign and process applications through CAPI - now they just need some applications. As of the time of this publication, there had been one on-line application submitted.

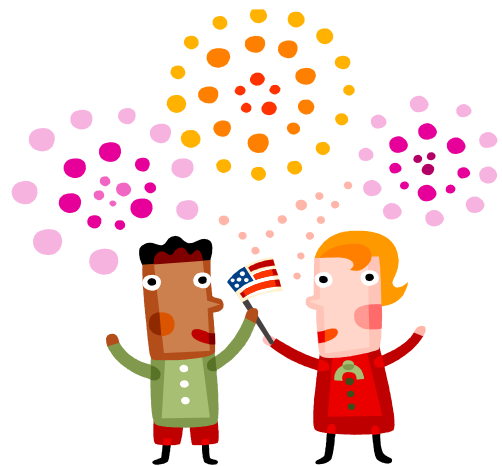
With each step in this process, we have learned a lot about how the system works and what processes need to be in place. We all owe a huge THANK YOU to NWSDS for being trailblazers and taking this on. I look forward to bringing what we have learned out to all of you.

Jennifer de Jong – SPD Modernization Program Business Transition Manager



Don't forget! Check FSUP and the application carefully to make sure the income SNAP is counting is the income the client still has. Income on the system that is not on the application or

explained in the narration will cause an error. The same is true if income is on the application or narration and not added to the system – so be thorough and look at every line and every page. A few more seconds up front will save a lot of work later on!



Have a safe and happy 4th of July!