

In the Loop

Oregon third in AARP ranking

A report released by the National AARP Public Policy Institute, ranked Oregon third overall nationally in support services for older adults, family caregivers and people with disabilities. Oregon ranked number one in supporting family caregivers.

Oregon ranked in the top five in these areas:

- reducing percentage of long stay nursing home stays after a hospital admission;
- percentage of disabled adults in the community getting needed supports;
- assisted living or residential care units available per 1000 population;
- ADRC/single point of entry for people seeking care options and information;
- percentage of Medicaid and state funded long term supports going to home and community based services for older people and people with disabilities;

- number of people consumer-directing services per 1000 adults with a disability.

“We are very pleased that this well respected national organization has recognized some of the great strides Oregon has made in caring for its most vulnerable people,” said Elaine Young, Manager of Oregon Department of Human Services’ State Unit on Aging.

AARP notes the report will provide state leaders and key decision makers with information to evaluate performance and establish more effective policies. AARP says all states need to vastly improve in areas including home care, assisted living, nursing home care, and supports for family caregivers.

The complete report may be found at:

<http://www.aarp.org/relationships/caregiving/info-09-2011/ltss-scorecard.html>

*Nelsa Brodie, SPD
Communications Office*



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

TTT (Train the Trainer) highlights

Below are some of the highlights from the August 18, 2011 Train the Trainer (TTT) meeting. More is discussed in the meeting, so please regard this as *only* a highlight.

To find out more about the TTT meetings, contact [Lauren Mitchell](#).

- **MDC code:** The list of cases coded MDC will continue to be sent to the field until the end of the year. It is imperative these cases be worked by January first.
- **Burial trusts:** There is no limit to the monetary value of a burial trust which can be transferred. The current policy is to *not* get an itemized list of costs included in the trust to reduce work load. If a pattern emerges of very large trusts being transferred to “shelter” funds, the policy may be changed.
- **Client calls to EAU and policy:** Please do not send clients directly to either the policy analysts or Estates Administration Unit (EAU) to get clarification. Workers should contact the analysts or EAU on behalf of the client and then provide the client with information. Client calls received by the policy analysts will be sent back to the case worker.
- **Home sales:** Sale of a home must be reasonable, but it does not need to be for real-market value as shown by the county assessor to avoid being an invalid transfer. Workers can use the assessor’s figure as an initial value, but the client is entitled to present any evidence to try and show the sale price is the real market value.
- **Revocable trusts:** First party Trusts that are revocable are available resources. Workers cannot, of course, force an applicant to actually revoke a trust, but whatever is in the trust is considered to be available, nonetheless.



If you have questions on these topics, please contact your lead worker or manager. Look for additional updates from TTT also in this newsletter.

Fair housing: protections and resources

Source of income protection under Oregon state fair housing law includes deposits and fees. There are reports of some landlords charging higher deposits for DHS clients than for other applicants knowing DHS will cover *up to* \$1200. Other landlords refuse to accept checks from DHS at all.

This is illegal! The deposit should be the same for all applicants, regardless of where the money to pay it comes from. If you see (or suspect) this is happening, please let us know and encourage your affected clients call the Fair Housing Hotline at 800/424-3247, ext. 2.

For more information on this protected class visit: www.FHCO.org.org/incm.htm. The Fair Housing Council is a nonprofit serving Oregon and SW Washington. Anyone may call the FREE Fair Housing Hotline at 800/424-3247, ext. 2 or visit www.FHCO.org

SSA narration – best practice suggestion

A recent suggestion from the field to re-examine the way workers narrate SSA income (SSI, SSB, SSD) has led to a new best practice suggestion for SSA income narration. The practice has been reviewed and accepted by the SPD Field Services unit, Targeted reviewers, statewide Quality Control, the SSP Field Services unit, the SNAP Program Unit and the SSP Medicaid Unit – so we all hope it helps!

The current direction for narrating SSA income is explained in [SS-IM-08-037](#) and deals specifically with verification through the computer matching system. The recommended narration is to narrate verification obtained through our screens as “verified through Social Security records”.

Because the recommended narration is used by workers for all verification, instead of just a data match verification, the narration has become inconclusive and vague. The best practice suggestion (not a requirement) to alleviate some of the confusion is to add both the date and source to indicate what was used, what you saw and when it happened.


Currently, workers narrate something like “\$674 verif. SSA record” for all SSA income instead of only for verification through the data match, as intended. Here is what the narration might look like using the best practice suggestion:

- \$674, verif. SSA records – 9/15 (*this will only mean a data match*)
- \$674 SSI , verif. 9/15 letter
- \$674, SSI, verif. 9/15 call to Jane X @ ###-####



Adding the date will help reviewers try to locate the amount used – especially if the recipient has had a lot of changes since the case was certified. More information about the source used will eliminate the vague narration and point whoever looks at the case in the right direction to determine what was used for the SSA income verification.

The additional narration will not eliminate or avoid all errors, but it should reduce some of the confusion and frustration on both sides. Thank you to everyone who weighed in – especially Peggy Nahalka and her team at the Estacada SPD for the original suggestion!

 **Don't forget!** A recent clarification from CMS says an AEN (Assumed Eligible Newborn) who moves here from another state is not an AEN in Oregon. Children under age one who apply for medical in Oregon as a new resident have to meet citizenship and SSN requirements like everyone else who applies.



CAPI tip of the month

- Transferring a case to another branch? If eligibility has already been determined, there is no need to transfer the application within CAPI. The new branch can simply search for the application via Statewide search if they need it.

Case management – TTT updates

Here are some updates from the In-Home unit which were shared at TTT. For more information on these issues or any others, please contact the SPD In-Home unit. To find out more about the TTT meetings, contact [Lauren Mitchell](#).

- **Spousal Pay:** All requests for spousal pay must be approved at initial opening and at the yearly review by Salem. Send an email request to [Darwin Frankenhoff](#) with the client's name and prime number to start the process.
 - When considering natural supports, leave all hours assessed, allowing the creation of the 546 to reduce the IADL and 24 hour availability by one half (1/2).
 - Two independent assessments are required at the initial approval.
 - Be sure to offer ICP if the spouse wants to be paid but does not qualify for Spousal Pay and the client is able to manage the plan.
- **Adult Day Services:** Currently, this Medicaid contracted program is only available in the Corvallis, Salem and tri-county (Clackamas, Multnomah, and Washington county) area, but Darwin is happy to discuss opportunities with interested individuals.
 - Adult Day Services (ADS) is available to almost anyone within the service areas;
 - Participants do not have to receive another waived service;
 - AFH and RAFH residents can attend up to three days a week if they meet the qualifications; see policy transmittal [SPD-PT-05-013](#).
 - The ADS programs usually have space for new attendees.
- **Contract agencies for in-home care:** The contracts as well as licensing rules state the contract agency must complete an initial assessment to make sure the agency can meet the needs of the client.
 - The initial assessment can be performed by anyone the agency selects;
 - Agencies are paid for up to three hours for the initial assessment;
 - The initial 546 voucher can have the assessment hours added after the assessment is completed;
 - Agencies are paid for the assessment they perform, even if they choose not to accept the client;
 - Workers are allowed to request a copy of the assessment performed by the contract agency;
 - If the agency agrees to accept the client, they must provide care 365 days, if there is a need;
 - The Department will not pay for transportation of the client by the agency.
- **Exceptions:** Thank you for all your work when completing an exception request. The number of requests approved at the initial review continues to increase.
 - When completing an exception request for an Independent Choices participant, please provide a copy of the 546IC with the request.



October 2011 training calendar

Monday	Tuesday	Wednesday	Thursday	Friday
3 Cultural competency and diversity (8:30 - 4:00)	4 CREW - Eugene (8:30 - 4:30) Basic Lean tools (9:00 -12:00)	5 CREW - Eugene (8:30 - 4:30) Metrics 101 (2:00 - 3:00)	6 DD and mental health eligibility for OSIPM (8:30 - 4:30) Basic Lean tools (9:00 -12:00)	7
10 	11 CREW - Hillsboro (8:30 - 4:30) Basic Lean tools (9:00 -12:00) Metrics 201 (1:30 - 3:00)	12 Core values (8:30 - 12:00) CREW - Oregon City (8:30 - 4:30)	13 Basic Lean tools (9:00 -12:00)	14 Cultural competency and diversity (8:30 - 4:00)
17 eXPRS user lab (1:30 - 4:30)	18 Eligibility 101 (8:30 - 4:30) DD eligibility training (8:30 - 4:00) Basic Lean tools (9:00 -12:00)	19 Eligibility 101 (8:30 - 4:30) Quarterly field supervisor's training (8:30 - 4:30)	20 Eligibility 101 (8:30 - 12:00) Basic Lean tools (9:00 -12:00)	21
24 Eligibility 201 (1:00 - 4:30)	25 Eligibility 201 (8:30 - 4:30) Case management essentials (8:30 - 4:30) Basic Lean tools (9:00 -12:00) Metrics 201 (2:00 - 3:30)	26 Eligibility 201 (8:30 - 4:30) Case management essentials (8:30 - 4:30)	27 Eligibility 201 (8:30 - 4:30) Case management essentials (8:30 - 4:30) Basic Lean tools (9:00 -12:00)	28 Eligibility 201 (8:30 - 12:00) Case management essentials (8:30 - 12:00)
31 Cultural competency and diversity (8:30 - 4:00)				

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

Civil Rights training reminder

The Food and Nutrition Service (FNS) requires all staff working with SNAP receive Civil Rights training at least once a year. In order to meet that requirement, there is an online class available for staff to take at their own convenience. The class takes about 15 to 20 minutes.

To receive credit for the class, you must read through all the information and answer all the questions. The online class can be accessed by going to the [SPD staff tools](#) and clicking on [DHS Learning Center](#). After signing into the Learning Center check courses and registration. The class is listed as *Online: SNAP Civil Rights*.

SNAP Policy Analysts



Don't forget!

If you remove someone from a medical case and open a new case for them, make sure you do it in the right order. First, close their benefits on the current case, *then* open the new case. If you open the new case then close the old one, MMIS will close their medical benefits because it reads the last action that was taken for a prime. Remember to watch those dates, too!



August 2011 SNAP honor roll

100% Accuracy!

0310	Canby SPD	100%	2111	Toledo ADS	100%
0411	Warrenton ADS	100%	2311	Ontario SPD	100%
0511	St. Helens SPD	100%	2911	Tillamook ADS	100%
0911	Bend SPD	100%	3013	Hermiston SPD	100%
0913	LaPine SPD	100%	3111	LaGrande SPD	100%
0914	Redmond SPD	100%	3112	Enterprise SPD	100%
1211	John Day SPD	100%	3211	Florence AAA	100%
1311	Burns SPD	100%	3311	The Dalles SPD	100%
1513	Medford SSO	100%	3411	Hillsboro SPD	100%
1717	Grants Pass DSO	100%	3617	McMinnville ADS	100%
1811	Klamath Falls SPD	100%			

90% or Better Accuracy!

2211	Albany ADS	96.00	1911	Woodburn ADS	93.33
2518	Portland West ADS	96.00	2019	Cottage Grove ADS	93.33
0111	Baker City SPD	93.33	3011	Pendleton ADS	93.33
0314	Estacada SPD	93.33	0611	North Bend SPD	92.00
1011	Roseburg SPD	93.33			

EPD payments

Please encourage any EPD (Employed Persons with Disabilities) clients in your case load to use the EPD Business Reply Mail envelopes they receive to make their monthly EPD Participant Fee payments. For most clients, it is easier than bringing their monthly payment to the office, and their payment will be posted more quickly.

Under some circumstances, the local office can receipt in EPD payments and then forward the payments to Salem. Receipting EPD payments locally is *not* preferred because of the extra steps and the potential for payment delays.

An EPD client who is currently bringing their payments to the local office should be informed of the potential delay and have their options explained to them.

If you have questions about the EPD program, please see [SPD Worker Guide 11](#) or contact [Jeff Stell](#) at (503) 945-6834 or by email; jeff.stell@state.or.us

October 2011

Bat appreciation month

Disability employment awareness month

Oct 3 - 7 : Customer service week

Oct 16 - 22: Freedom of speech week

Oct 24 - 31: Prescription errors education week

Oct 1: International day of the older person

Oct 4: Improve your office day

Oct 7: National diversity day

Oct 11: Face your fears day

Oct 15: White cane safety day

Oct 17: National boss' day

Oct 24: Lung health day

Oct 28: Frankenstein Friday

Oct 29: National cat day

Oct 31: Halloween



Don't forget! When you calculate income using pay stubs, remember to check the rate of pay on each stub to see if the client received a raise. If they did, you can't add up the total gross income and divide by the number of checks. Instead, you can use the hours and multiply by the current rate of pay – just be careful to include the overtime, vacation and holiday pay.



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

Debbie Harms - Executive Support

Nathan Singer - Transition Services

Karen Gulliver - Quality Assurance

Janet Morse - Administrative/Technical

Assistant and Hearings Coordinator

Provider payment questions

Just a reminder to Field Staff, providers should not be calling the Payment Support Unit at Central Office for issues. The provider is to have one point of contact, their local office. The Payment Support Unit is here to support our Field Staff should they need assistance. Providers *should not* be referred to the Payment Support Unit for any reason.

If a provider requests a replacement W2, 1099 or Earning Statement, or if they need a income verification for any reason, the provider should call the tax line at 503-947-5138 and leave a complete message.

Requests for employment verification can be completed at the local offices. If, for some reason, the local office cannot complete the verification, it must be faxed to 503-947-5357. The verification must be accompanied buy a current authorization signed by the provider and dated within the last 3 months.

Kristen Hutton, SPD Payment Support Unit

IADL reduction training

- Watch the [Learning Center](#) for IADL reduction training - coming soon!
- Training will be via Netlink on October 24, October 25, and October 27.



Excel tip – adding a second line

If you want to add a second line within a single Excel cell (a box), use the *Alt+Enter* command instead of spacing.

Place your cursor at the end of what you want to be the first line, hold down the *Alt* key (bottom left of your keyboard) and tap *Enter*. This will give you a new line which will be formatted the same as the first one. It will look like the example, with each fruit it's own line:

	A	B	C
1	Fruit Type:	Ship to:	
	Apricot	1212 Main Street	
	Coconut	Anytown, Oregon	
	Fig		
	Logan berry		
	Persimmon		
2	Pomegranate		

Spacing over until the line drops down is confusing to the program. Plus, adding extra spacing to make the second line drop means any changes to formatting will require additional work on your part and additional spaces. Using the *Alt+Enter* command will allow you to resize and sort your spreadsheet without any additional work. Don't force the formatting – use the program tools and save yourself time and effort!

Modernization update

Hey everyone! We may be heading into fall, but things are really heating up with the Modernization Program. By the time you read this, DHS policy analysts will have completed training on the Oracle Policy Modeling - the system by which they will translate existing eligibility policy into rules for the Eligibility Automation (EA) software. These are only the first steps, but this training will allow our policy analysts to update the EA software as we have policy changes, rather than relying on a contractor to do it for us.

The performance testing for CAPI has been completed and some much needed upgrades to the CAPI the server are in the works as well as a few code fixes. You should see increases in speed and performance soon!

CAPI FAQs:

Q: Why can't I navigate to or edit information under the Income, Individual Deductions, or Household deductions tabs?



A: The application is a filing page only. The client will have to either submit a paper or online application.

Note: In the Eligibility Tab in CAPI, choose the disposition status that matches the decision of the application itself. If you deny SNAP benefits, narrate in ACCESS you honored the filing date but denied the application.

Q: A client came in to the office and said he completed an online application but I can't find it in any of our queues. What should I do?

A: The application may have been routed to another branch or the client may not have completed the application fully (e.g. saved and exited the online application site before actually submitting). Complete a Statewide Search. If you find the application in another branch, contact the branch to determine who should process the application. If you do not find it, encourage the client to login again, verify it shows a status of 'Submitted' and have them write down the tracking number so you can locate it.

As always, if you have problems with CAPI, you can contact Samantha Brookshire via email samantha.s.brookshire@state.or.us or by phone at 503-947-5278 or Jennifer de Jong via email jennifer.d.dejong@state.or.us or by phone at 503-945-5856. See you next time!

Voter registration deadline

The deadline for the November special primary election is **Tuesday, October 18**. Voter registration forms not received in the county elections office by October 18 will be too late for the November 8th primary. *Postmarks don't count*; the form has to physically be in the hands of the elections office no later than the deadline.

Questions? Contact [Karen Gulliver](mailto:karen.l.gulliver@state.or.us) by phone 503-945-6460, IM, or email: karen.l.gulliver@state.or.us

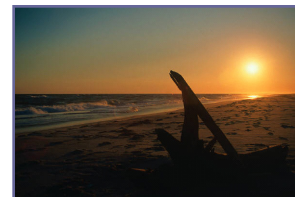
OHP regional meetings

The Fall Regional meetings are underway. Meetings will be held in Oregon City, Eugene, The Dalles, Salem, Baker City, Pendleton, Bend, Portland, Roseburg and Newport. The agenda this round includes presentations on enrollment/disenrollment, recipient fraud and third party insurance/HIPP.

The schedule, agendas and handouts are on the Regional Meeting web page: <http://www.oregon.gov/OHA/healthplan/managed-care/regionals.shtml>. You do not need to pre-register and v-con is available at most locations.

For more information contact Carolyn Thiebes, 503 378-3507 or by email carolyn.thiebes@state.or.us.

We hope to see you there.



Want to see your area featured in *In the Loop*? Its easy! Gather your photos and story then contact Karen Gulliver with SPD Field Services (karen.l.gulliver@state.or.us) and your area can be famous too!

What about privacy?

Privacy is a right that people have and security is the protection of that right. DHS is concerned with maintaining both the PRIVACY and SECURITY of the information it generates, sends or receives. Honoring privacy prevents identity theft and protects client information. As DHS employees we are entrusted with all manner of client and personal health information.

One of the leading causes of privacy incidents at DHS is misdirected mail. One of the most common ways for this to happen is when papers are picked up from the copier and not checked before they are mailed, causing protected information for one client to be sent to another client. When this happens, a privacy incident must be reported. Here's how it works:

- First, tell your supervisor.
- Gather as much information as you can about the incident, such as date, time, location, type of information shared, contact information, etc. You can download the Privacy Incident Report Form DHS-3001 (<https://apps.state.or.us/Forms/Served/me3001.doc>) to assist in gathering the information.
- Your supervisor will report the incident to the Privacy Office.

Click here <http://inside.dhsoha.state.or.us/asd/info-security/report-an-incident/incident-reporting-examples.html?showall=1> to see examples of other types of privacy incidents that must be reported.

Caryn Whatley is the Privacy Representative for SPD. If you have any privacy related questions, give her a call at 503-947-5427 or send an email: caryn.whatley@state.or.us.

