

James Toews  
Authorized Signature

**Number:** SPD-AR-08-053  
**Issue Date:** 8/15/2008

**Topic:** Developmental Disabilities

**Due Date:**

**Subject:** 2007-2009 Settlement for Case Management (SE48)

**Applies to (check all that apply):**

- |                                     |                               |                                     |   |
|-------------------------------------|-------------------------------|-------------------------------------|---|
| <input type="checkbox"/>            | All DHS employees             | <input type="checkbox"/>            | County Mental Health Directors            |
| <input type="checkbox"/>            | Area Agencies on Aging        | <input type="checkbox"/>            | Health Services                           |
| <input type="checkbox"/>            | Children, Adults and Families | <input type="checkbox"/>            | Seniors and People with Disabilities      |
| <input checked="" type="checkbox"/> | County DD Program Managers    | <input checked="" type="checkbox"/> | Other (please specify): DD Program Office |

**Action Required:**

Please review your **preliminary SE48 year-end report** sent via postal service earlier this week. Review of and correction to these data will help achieve the correct balance for FY 2007-2008. Submit all additions or corrections by **September 19, 2008** to the DD Provider Payment Unit, 500 summer Street NE #E-12, Salem 97301; fax (503) 373-7274.

Use the new 0337 form to make a correction to or add a SE48 CPMS enrollment. To make additions or corrections to your contact data for 2007-2008, please list the client name, prime number, and the month for addition or removal of the contact. Send this information via fax to the number above, or via email to [Kim.M.Wise@state.or.us](mailto:Kim.M.Wise@state.or.us)

**Reason for Action:**

The settlement of Case Management services (DD48) for the 2007-2009 biennium will include two different processes, each supported by different systems. One process will address funds awarded and paid through FAA, using Rbase and CPMS. The other process will address funds awarded and paid through the Express Payment and Reporting System (eXPRS).

In order to minimize the amount of confusion and work load resulting from a two-system settlement process, the Department will execute amendments and a Service Element Prior Authorization (SEPA) to balance 2007-2008 while the contract is still in

effect. The goal of this work is to reduce, if not eliminate, the need for DD 48 settlement for FY 2007-2008.

Once the corrections you submit from the preliminary year-end report have been completed by the DDPPU, a **final FY1 year-end report** for SE48 will be run. The Contract Administration Unit will use the final report to process an amendment and SEPA, shifting funds from 2007-2008 to 2008-2009. The financial impact of this amendment will be \$0.00, and is solely for the purpose of reducing/eliminating the settlement process in the FAA/CPMS system.

If the final FY 1 year-end report demonstrates your encounters are sufficient to meet your 2007-2008 DD 48 performance requirement, no additional review of your CM encounters for this period is required. If the encounter and award information goes unchanged for this period, you should not have the need to settle DD 48 for the CPMS system. Your settlement for the second fiscal year (2008-2009) will occur automatically through the eXPRS Provider Liability Account process.

If however, the final FY 1 year-end report demonstrates your encounters are not sufficient to meet your 2007-2008 DD 48 performance requirements, the Contracts Administration Unit will shift some of your award to 2008-2009. This activity will allow the settlement process for DD48 to occur through the eXPRS Provider Liability Account process.

**Field/Stakeholder review:**       Yes       No

**If yes, reviewed by:**

*If you have any questions about this action request, contact:*

<b>Contact(s):</b>	Carolina Marquette		
<b>Phone:</b>	(503) 949-4588	<b>Fax:</b>	
<b>E-mail:</b>	<a href="mailto:Carolina.v.marquette@state.or.us">Carolina.v.marquette@state.or.us</a>		