

Mike McCormick

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Number: APD-AR-16-053
Issue date: 7/18/2016

Topic: Other

Due date:

Subject: Sharing Case Information with Estates Administration Unit

Applies to (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> Health Services |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services(ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> ODDS Children's Residential Services | <input type="checkbox"/> Other (please specify): |
| <input type="checkbox"/> Child Welfare Programs | |

Action required: With the implementation of EDMS, APD and AAA consumer case files are kept electronically in the Case Information and Case Information Secured queries in EDMS. The Estates Administration Unit (EAU) has access to view documents in both of these queries.

Estate recovery is very time sensitive. Delays can result in lost revenue for APD's budget. When a consumer passes away, the local office must transfer the case in Oregon ACCESS to Branch 8606 within 10 business days of death or learning of the death, whichever occurs first.

Local office staff no longer need to email the 454D to EAU as long as the case has been transferred to 8606 and the file has been uploaded to EDMS so EAU can retrieve documents directly. If staff need to add information to the case narrative after the case has been transferred to 8606, contact the person(s) in your district with rights to narrate in 8606 cases.

****Please Note:** Do not change the sending branch number to 8606 when scanning documents into EDMS. IRMS will reject the scan and return it to the sending branch.

When form 647 has been completed, scan it into EDMS. When verified the form has been uploaded, send EAU a secure email (Estate.admin@state.or.us) with the name

and prime number of the consumer. EAU will review and take timely action in order to secure an interest in any real property.

***Please Note: Forms 454D and 647 should always be indexed separately in the Legal Document category in EDMS for easy identification by EAU staff.*

If the case file has not yet been scanned into EDMS, it is recommended to scan the decedent's case file into EDMS according to current procedure. This means documents from the current year and one prior year would be scanned into EDMS and older documents not needed for current eligibility would be paper-archived. As always, narration of the Accession Number is necessary to indicate where paper-archived documents are located in the IRMS warehouse.

Reason for action: Change in local office process as a result of case files stored electronically in EDMS.

Field/stakeholder review: Yes No

If yes, reviewed by: APD Policy and APD Operations

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

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