



DEPARTMENT OF HUMAN SERVICES
SENIOR & DISABLED SERVICES DIVISION
500 Summer Street NE
Salem, Oregon 97301-1076
Phone: (503) 945-5811

AUTHORIZED BY: _____

SDSD Administrator/Deputy/
Assistant Administrator

INFORMATION MEMORANDUM

SDSD-IM-00-106

Date: October 17, 2000

TO: Area Agency on Aging Directors
SDSD District and Unit Managers

SUBJECT: Introduction of New Case Descriptors and Need/Resource Codes

INFORMATION: The following case descriptors and need/resource codes are now available for use in the Client Maintenance System. The case descriptors are designed to assist in identifying specific types of cases related to those served by the Mental Health and Developmental Disability Services Division, clients who have court ordered community spouse resource divisions, and cases which are Medicare eligible and whose income is above the QMB/SMB standard. The need/resource codes will now include a resource code to identify qualified annuities the client has purchased which are considered unearned income and a need code to calculate income cap trust costs that are allowed as an income deduction for nursing facility and waived clients.

Case Descriptors:

- CTP - Court ordered petitions granting income and resources to the community spouse. Available to nursing facility and waived clients.
- RTF - MHDDSD case managed clients in a residential treatment facility.
- RTH - MHSDSDS case managed clients in a residential treatment home.
- SBT - MHDDSD case managed clients in secured residential treatment facility.
- SBI (State Funded Buy-In)- Medicare beneficiary who is not income eligible for QMB/SMB.

Need/Resources:

- ANU - (Resource) Annuity Income
- ITC - (Need) Income trust costs. Valid only on waived and nursing facility cases.

CONTACT PERSON: Jeff Miller
E-MAIL: jeffery.r.miller@state.or.us
CONTACT NUMBER: 1-503-945-6410
FAX NUMBER: 1-503-378-8966