



**DEPARTMENT OF HUMAN SERVICES**  
**SENIORS & PEOPLE WITH DISABILITIES**  
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**AUTHORIZED BY:** \_\_\_\_\_  
**Administrator**

**INFORMATION MEMORANDUM**  
**SPD-IM-03-013**  
**Date: January 31, 2003**

**TO:** Area Agency on Aging Directors                      CHS SDA Managers  
CHS/AAA Field Managers and Staff                      CHS SDA Assistant Managers  
SPD Managers and Staff                                      CHS Central Office Managers

**SUBJECT:    Systems Update for SPD Changes**

**INFORMATION:**

Please see the attached update regarding the systems conversions and changes that have been made to accommodate the budget cuts the Department is taking.

**CONTACT:**

For all systems problems (Oregon ACCESS and the mainframe systems), please contact the Help Desk at (503) 945-5623

For policy questions, please contact the appropriate program coordinator listed in the SPD Technical Assistance Guide. This was last issued under IM-02-033

# Systems Update for SPD

January 31, 2003

## Conversion of Eligibility Records

The conversion for the SPD changes went very well. The GA cases were converted to no cash, OSIPM-Presumptive. The Medically Needy coverage was ended and cases with the appropriate QMB/SMB/SMF coding and income levels were converted, the rest were closed. Cases with Medicare who were not coded as QMB/SMB/SMF were closed. The 211 cases that received the Medical Notice 4, Review Required in February, were bypassed in the conversion so they stay open until the review is done.

Oregon ACCESS had some difficulties with the updating of their records with the new converted data. We believe that this has been resolved and that any missing or incorrect updates have been corrected.

## Reports now available

Four new reports are now available on View Direct under the Special Reports number (SJU0000R-A). There is one each for each conversion (GA, MN, Survival level change). An additional report is available that combined all of the cases on the other reports and was then sorted by branch number and service worker ID. This report is called the Case Management Tool report. This was requested by some offices that have a separation in case management and eligibility and were having difficulty with the lists sorted by eligibility worker.

## Systems Changes

All of the essential system updates are in place. We can accommodate the Aid Paid Pending cases by adding the APP N/R code to the CMS record. This will allow the case to keep the service category code (APD) and the service need code (HK, SVC, etc.). The clients eligible for 20 hour personal care can have the BPA service category and the HK service need added. This will allow the JH-CEP system to be used to issue a voucher under code OC111 for up to 20 hours.

While the essential changes have been made we still have a lot to do to fully implement the changes. For example, many of the CMS messages still refer to Medically Needy codes (MNN/MNS/QMS). This doesn't effect processing because the codes aren't allowed anymore but it can lead to confusion. Other issues have to do with the behind the screens programming where the process may handle 98% of

the circumstances but some unusual situations still need to be covered.

#### Automatic Processing Update (see IM 03-010 for detail on these items)

Vouchers for February - The vouchers for February will be printed today and should be mailed Monday (02/03/03).

JD-CBC record Closure - The CBC/512 records for the clients effected by these closures/reductions will be closed this week-end.

JF-Pay-in - The Pay-in records for the clients effected by these closures/ reductions will be closed this week-end. The billing for the remaining clients will be printed and mailed on Monday.

#### Systems Update Not Related to the Budget Cuts

Incorrect 1099s - The corrected 1099s have been issued and should be mailed today (01/31/03). About 600 providers received payments in both 2001 and 2002. They will receive the corrected 1099 and a letter explaining that the original was an error. About 200 providers are new and did not receive any 1099, they will just get the correct 1099. About 100 providers had income in 2001 but not 2002. They will receive a letter informing them that the 1099 we sent was an error. The tape that provides information to IRS had not been sent yet so we were able to create a new correct tape.

PIF on CBC/512 Records - The PIF amount displayed on the DISB screen and printed on the 512 for some clients (those with combined income) was incorrect. We have updated the on-line record and will print new 512s this week-end. The new 512s will be mailed Monday.

#### Systems Availability

There was a problem with the communication of the new OHP2 premium amounts between CMS and MMIS. This caused some of the MMIS files to be closed all day 01/30/03. Both CMS and SPD systems are dependent on files in MMIS so this problem also effected our availability. It appears that the problems that effected our systems have been corrected. OMAP still has issues with ENRC and some of their processing but the files that we need are available now. As a result of these problems clients Medical Cards will not be mailed until the week-end. The clients eligibility information will be available to providers through the automated systems (ACES, EVES, First Health for pharmacy) on the first.

Note: Many of the Departments programs that do the batch processing and payments

may be running all week-end. Files and systems may be closed. We anticipate that the JH-CEP files will be closed and others may also.

#### Concerns that have been raised - Tips/Reminders

We have had several calls about cases that were not converted or closed. All of these clients either received Medical Notice 4 or had requested a hearing and were approved for Aid Paid Pending. The notice 4 list is on View Direct, these clients must be reviewed locally, notice provided regarding eligibility and action taken by 2/28/03.

We also are getting a significant number of calls claiming that the service eligibility record was read incorrectly. The system looks at the table on the mainframe that is created when an Oregon ACCESS CA/PS record is updated. It uses whatever information is current on the record at that exact moment. Oregon ACCESS does not have enough information for you to determine what data was used at any given moment. If you look at the SSEQ/SSEI screens on the mainframe you can see the exact time (hour/minute/second) that someone updated the record and the RACF ID of the person who made the change. We have fielded hundreds of calls on this issue and found no errors in the system updates.

We have received calls regarding incorrect income calculations and cases not closed or closed incorrectly. This generally results from one of two issues; the case inappropriately has a SIP code on it which overrides the income calculation or income was originally added with a CHAN or TRAN Incm code. Another possibility, though it effects few cases, is that a case coded as waived has more than one person. Waivered cases should always only have one person households.

Please continue to call the Help Desk with any issues. This is the best way for us to determine when we have a systems issue. The Help Desk should create a ticket or activity and provide you with a tracking number. Try to record the number. This will help us all track any issues that come up.