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Authorized Signature
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Topic: Medical Benefits

Continuing Regional Eligibility Workshops (CREW) Training 2011 for SPD
Subject: and SSP Case Workers and Case Managers

Applies to (check all that apply):

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|-------------------------------------|-------------------------------|-------------------------------------|--|
| <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"/> | Children, Adults and Families | <input checked="" type="checkbox"/> | Seniors and People with Disabilities |
| <input type="checkbox"/> | County DD Program Managers | <input checked="" type="checkbox"/> | Other (please specify): CAF SSP Case Workers and Case Managers |

Message: Once a year, SPD Central Office offers Continuing Regional Eligibility Workshops (CREW) policy training to field staff in various locations throughout the State. Due to many training requests from Self Sufficiency Program (SSP) staff around the state, we are including a one-day training for SSP staff, in Eastern and Southern Oregon only, on OSIPM and QMB. Monthly training opportunities are available for staff from locations closer to Salem. SSP CREW trainings will target SSP staff in Eastern and Southern Oregon, where it is more difficult for staff to attend training in Salem. This Informational Memorandum has two parts: the first part will be information for SPD staff on the SPD CREW curriculum, and the second part will be information related to the SSP CREW training in Eastern and Southern Oregon.

SPD CREW

SPD will conduct a full day CREW training, instead of a half-day training as was done in the past. The use of policy manuals will be presented in a large group setting for all staff. There will be small group break out sessions, where staff can choose three out of six classes to attend. Classes on both Medicaid eligibility and case management will be offered. The small group classes will include:

Breakout Session 1 (10:15-11:45 AM):

Option 1: Allocating and Deeming: this class will review program eligibility policy on Allocating and Deeming for OSIPM. Audience: Eligibility Workers. Instructor: Michael Avery.

Option 2: Natural Supports: this class will cover questions to ask clients to help them identify potential supports; questions to ask a potential natural support; challenges in assessing natural supports; how to apply natural supports to a service plan to ensure the client's needs are sufficiently and safely met.

Audience: Case Managers. Instructors: Suzy Quinlan and Selina Hickman.

Breakout Session 2 (1:00 – 2:30 PM):

Option 1: Work, Medicaid, and Disabilities (WMD): this class will cover Medicaid and Medicare Savings Program eligibility for people with disabilities who are employed or are considering employment. Topics will include Employed Persons with Disabilities (EPD), program eligibility for working disabled clients not receiving EPD, Social Security Administration work incentive programs, and resources in the community for clients wanting to work. Audience: Eligibility Workers and Case Managers. Instructor: Jeff Stell.

Option 2: Transfer of Assets: this class will cover general asset transfer policy, and includes information about determining if a transfer of an asset is disqualifying, the length of the disqualification, and hardship waivers. Areas covered will also include transfers of the home to a care-giving child and transfers involving life estates.

Audience: Case Managers and Eligibility Workers. Instructor: Michael Avery.

Breakout Session 3 (2:45 – 4:15 PM):

Option 1: Developmental Disability (DD) Waiver Eligibility and Communication Process: this class will explain eligibility for DD waivers, how DD waivers are impacted by Medicaid and Medicare Savings programs, and communication protocols between SPD/AAA offices and local DD case managers and brokerages. Audience: Eligibility Workers and Case Managers. Instructor: Jeff Stell.

Option 2: SPL rules: this class will cover some problem areas identified in recent Quality Assurance field reviews; specifically, assessing ADLs based on OAR 411-015-0006, with an emphasis on the area of mobility. This will include how to decide when negative physical health consequences from a fall may be considered in assessing ambulation or transfers.

Audience: Case Managers. Instructors: Suzy Quinlan and Selina Hickman.

SPD CREW classes will begin at 8:30 AM and end at 4:30 PM. SPD CREW dates and locations are as follows:

Roseburg: July 19th
Coos Bay: July 21st
Pendleton: August 16th
Bend: August 18th
Klamath Falls: August 30th
Medford: September 1st
Salem: September 21st and 22nd
Ontario: September 27th
LaGrande: September 29th
Eugene: October 4th and 5th
Hillsboro: October 11th
Oregon City: October 12th
Tillamook: November 2nd
Gresham: November 14th and 15th

Staff can register for the SPD CREW classes on the DHS Learning Center. Please click on **Special Events** and then **Event Registration**.

SSP CREW

In response to many training requests by SSP managers and staff in Eastern and Southern Oregon, a one-day class on OSIPM and QMB eligibility for SSP staff will be offered. The class will cover basic OSIPM and QMB eligibility, financial and non-financial eligibility factors, Presumptive Medicaid Disability Determination Team (PMDDT) referrals, and coding for D4 and QMB cases. Classes will be taught by Jeff Stell and Michael Avery, and will start at 8:30 AM and go until 3 PM.

SSP CREW classes dates and locations are as follows:

Roseburg: July 20th
Coos Bay: July 22nd
Pendleton: August 17th
Bend: August 19th
Klamath Falls: August 31st
Medford: September 2nd
Ontario: September 28th
LaGrande: September 30th

Staff can register for the SSP CREW training on the DHS Learning Center. Please click on **Courses & Registration** and type in SSP Continuing Regional Eligibility Workshops (CREW) 2011 or Course Number C02576.

If you have any questions about this information, contact:

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