



# April 2012 On Target

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[Click here to link to the Family Services Manual](#)



## Narrating Financial Information

The narrative guidelines provided information on how financial information should be narrated. The narrative must include information about financial eligibility and what was used to verify that information.

Here's the specific guidance from *The Narrative Guidelines*:

**Financial Eligibility:** *Income – earned, unearned, excluded, calculation, pay stubs/verification used, self employment, results of screen checks, if no income how they are meeting basic needs; NC1/NC2 calculations; resources; pursuing assets; good cause; cat el.*

### Required Staff Actions:

- \* Check screens and narrate the results
- \* See the November 5, 2008 Information transmittal or the September 2011 addition of On-Target for guidelines on how to narrate income received from SSA benefits
- \* When narrating information about other income, indicate how verified (i.e. screens, pay stubs, financial aid or other award letters, etc.). For SNAP and TANF if no income, narrate how the client is meeting basic needs. SNAP, this refers to clients who claim shelter costs beyond their reported income.

### Examples:

- Income verified by (viewing pay stubs-viewing UI screens-wage screens-etc.) – no other source of income identified through screen check.
- Prospective income from Target verified by Sharon Roberts at (971-665-0707). Client working 20 – 25 hours per week at \$9.10/hour. 22.5 hrs x \$9.10 x 4.3 wks = \$880.43 EML.
- All screens checked – nothing current and active at this time.
- All screens checked – possible UI claim pending for UI application
- Client states they are receiving SSI – verified through SSA records. (DO NOT narrate specific social security screens used to verify information)
- All screens check – nothing current at this time. Client indicates they are homeless and been meeting basic needs by visiting shelters, food banks, staying with friends. Note: Applicants for medical programs do not need to explain how they are meeting their basic needs when they have no income.

Even though the client may have verification of one type of income, for example financial aid, all screens need to be checked and the information narrated to ensure there aren't other types of income available to the client.

The client's story is important. If you narrate "Client states they have no income," still check the screens and narrate that the screens have been checked.

For questions, contact Carol Krager, TANF/TA-DVS Policy Analyst (503) 945-5931

*Carol Krager, TANF/TA-DVS Policy Analyst*

## Network Performance and Accuracy

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We, in the Office of Program Integrity, know how challenging it is to verify all the information needed to accurately determine eligibility when systems are slow. So, in case you missed it, here is an excerpt announcing an important system improvement project.

To: All DHS Staff

From: Trisha Baxter, Chief Operating Officer APD/DD and Jerry Waybrant, Chief Operating Officer SS/CW

### Improving DHS Network Performance in our Field Offices

As web-based and other high-bandwidth programs have come online, DHS field offices across the state have struggled with sluggish performance of equipment and software. In some instances, it takes 30 minutes or more to simply log on to the network in the morning – and once logged-on, additional time is lost by longer-than-necessary wait times, freezes, reboots and other issues.

DHS has documented an increase in these problems recently, and so the DHS|OHA Office of Information Services, with the support of the Oregon State Data Center and Department of Administrative Services, has been approved to move forward with a pilot project in fifteen field offices to increase bandwidth and improve DHS network performance. The expected result will be increased performance and efficiency of devices and programs operating on the DHS network – and that means better outcomes for clients and more productivity for field offices.

The fifteen pilot sites were chosen because they had *the slowest network response times and most serious bandwidth issues*. We know that many offices have these same issues, but these offices faced the most serious challenges. The pilot locations are shown below:

- Klamath Falls, 700 Klamath Avenue
- Portland (2 locations), 3618 SE 122<sup>nd</sup> Avenue and 1425 NE Irving
- Eugene, 2101 W. 11<sup>th</sup> Avenue
- Salem, 1185 22<sup>nd</sup> Street SE
- Ontario, 186 East Lane
- Hillsboro, 5300 NE Elam Young Parkway
- La Grande, 1607 Gekeler Lane
- Grants Pass, 2166 NW Vine Street
- North Bend, 3030 Broadway Street
- Bend, 1300 NW Wall Street
- Beaverton, 4805 SW Griffith Drive
- Roseburg (2 locations), 1937 W Harvard Avenue and 621 W Madrone
- Hermiston, 950 SE Columbia Drive



New data lines for each of the pilot site offices will be ordered as soon as possible, and we will be able to give more specific installation details at that time. Today, we are working to get benchmark measures in place to ensure we can show the improvement in performance following the upgrade. Once the pilot is completed (60-90 days after installation), we'll review the performance and make decisions about upgrades and timing for the remaining DHS office locations.

We know these issues have been frustrating and thank everyone for their patience as we improve our technology in the coming months.

If you have questions or concerns, please contact Gene Evans, DHS Communications Director ([gene.evans@state.or.us](mailto:gene.evans@state.or.us))

*Trisha Baxter, Chief Operating Officer APD/DD and Jerry Waybrant, Chief Operating Officer SS/CW*

### CAP/CAPI News FLASH

In January 2012, CAPI Release 2.10 went live in the field. Business and field leadership is now moving forward with a transition from additional scheduled releases to these two areas of focus:

1. Maintain and stabilize any problems with the current CAP/CAPI system, and
2. Work on an exciting near-future enhancement to CAP/CAPI referred to as the "Initial Win." You'll be hearing more about the Initial Win soon!

Janel Pettit, Business Transition Consultant

## How to Count UC Payment Dates

Confused about how to count UC payments when there is a potential 5<sup>th</sup> payment in a month? Turns out, you're not alone. This issue came up several times this month based on reviews of January eligibility decisions.

The best way to know for sure what day of the week the client physically receives their UC payments is, of course, to ask the client. (Also, don't forget to check what the client wrote on the application.) The Medical Policy unit strongly encourages direct contact with the client because the actual day the client has access to the funds may vary particularly if they get paid by check.

So here are some basics about UC. Clients can be paid three ways: by "Reliacard," by direct deposit or by check. The Reliacard is a U.S. Bank Visa card used by OED to issue UC payments.

ECLM, EPAY (F13 from ECLM) and the individual payment screens all show the method of payment for UC:

RD = ReliaCard

ED = Electronic Deposit

P (with no other descriptor) = Check

Pretty easy so far? Lets talk about dates. Four dates come up in regard to UC: Processed date, Entered Date, Last Activity Date and Reconciliation Date.

Processed Date: This is a term best dropped from any UC discussion because it isn't a date on any UC screen and it could mean different things to different people.

Entered Date: Clients are normally required to check in with OED by phone or computer each week. They normally do this on Sunday or Monday so they can get their check as soon as possible. The "entered date" is generated on the Monday night run unless Monday is a holiday or the client did not check in timely.

Last Activity Date: This is the last day of the week the check was processed to pay. This is normally the same as the "Entered Date." THIS is the date you count from to estimate when the client receives access to their funds. You must go into the individual payment screen to see the last activity date.

Reconciliation Date: For RD and ED the reconciliation date may be the same as the entered date and the last activity date; but, for checks it will be considerably later. The check is reconciled by OED once it has cleared the bank and been returned to OED. You must go into the individual payment screen to see the reconciliation date.

So when does the client get their money?

RD – Funds are available on the card the day following the Last Activity date.

ED - Funds are normally in the client's bank account two days after the Last Activity date.

P (check payment) – Checks are mailed the day after the Last Activity date (Normally allow 3 days for mailing).

In summary, most UC clients are paid through the ReliaCard or Direct Deposit but some are paid by check. The "Last Activity" date is the date you want to work from in estimating whether a fifth payment was received in the budget month. Thanks to all those who provided input to this article!

Program Accuracy Team

Date: 02/17/11 PAYMENT DISPLAY

* Last Activity *		9/1/05	
P&M	Last Activity Date		
The last day the week processed to pay. Date format is: MM/DD/YY.			
When the week is paid:		Hrs	00
1. Benefit checks are mailed the next work day. (Allow 3 Days for mailing)		\$20	0
2. Electronic Deposit payments are posted to claimants' accounts two working days later. (Allow 2 Days for deposit)		\$20	0
3. ReliaCard Deposit payments are available on second working day. (Allow 1/Next Day for deposit)		\$20	25
F3) Exit			
5) Clm Sum	13) Pay List	PA1) Print	

How to count receipt of payment for UC Bens: Add appropriate number of days to "Last Activity" date.



# March 2012

## Targeted SNAP Reviews

### 100% Accuracy Honor Roll

0313	Milwaukie SPD	1418	SE Portland ADS	2818	N/NE Portland ADS
0701	Alberta SSP	1513	Medford SSO	2911	Tillamook ADS
0913	LaPine SPD	1611	Prineville SPD	3011	Pendleton SPD
0914	Redmond SPD	1612	Madras SPD	3112	Enterprise SPD
1201	John Day SSP	1911	Woodburn ADS	3211	Florence ADS
1211	John Day SPD	2111	Toledo ADS	3411	Hillsboro SPD
1311	Burns SPD	2202	Lebanon SSP	3415	Tigard SPD
1404	Refugee Branch	2405	Keizer SSP	3515	Portland Mid-Area ADS
		2411	North Salem ADS		

### 90% or Better

97.83	D8 Processing Center	1503	94.74	Tillamook SSP	2901	92.00	McMinnville ADS	3617
97.78	Eugene LCOG ADS	2011	94.29	Corvallis SSP	0201	91.67	Warm Springs SSP	1603
96.67	Astoria SSP	0401	93.33	Baker City SPD	0111	91.67	Albany ADS	2211
96.67	St. Helens SSP	0501	93.33	Canby SPD	0310	91.43	Gateway Center	1102
96.67	Newport SSP	2101	93.33	Gold Beach SPD	0811	91.11	Metro Processing Ctr	1403
96.00	Medford DSO	1517	93.33	SE Portland SSP	1401	90.91	North Clackamas SSP	0303
96.00	Klamath Falls SPD	1811	93.33	Woodburn SSP	1901	90.00	Baker City SSP	0101
96.00	West Portland ADS	2518	93.33	Albany SSP	2201	90.00	Integrated Srvs SSP	0702
96.00	Beaverton SPD	3417	93.10	Cottage Grove SSP	2003	90.00	W Medford Proc Ctr	1504
95.74	Klamath Falls SSP	1801	92.86	Burns SSP	1301	90.00	D4 Processing Center	2203
95.00	Bend SPD	0911	92.00	Springfield SSP	1101	90.00	North Salem SSP	2402
94.74	LaPine SSP	0903	92.00	Grants Pass DSO	1717	90.00	Milton-Freewater SSP	3004

### “Rumor Has It...”

You may have heard that due to the decline in Oregon’s unemployment rate, Oregon no longer meets the conditions to continue certain UC extensions. Although there may still be a balance remaining on the claims screen, the client cannot collect on that particular claim.

However, some clients may qualify for a new claim or for a different extension:

- If there has been a break in UC benefits of more than a week, or the client provides a denial letter from the Employment Dept, remove the UC income from the ERDC, MAA, MAF, SNAP, or TANF case. Do not remove the UC from OHP or HKC cases
- For SNAP and ERDC in SRS, if the client later qualifies for a new claim or extension, the client is responsible to report if they are over the 130% FPL
- For MAA, MAF, TANF and ERDC in CRS, clients should report changes in UC of more than \$50.
- OHP and HKC clients are not required to report changes in income.

For more information about how and when to count UC, please reference the IM transmittal SS-IM-09-047 at: <http://www.dhs.state.or.us/policy/selfsufficiency/publications/ss-im-09-047.pdf>



# March 2012 Targeted Medical Reviews 100% Accuracy Honor Roll

0101 Baker City SSP	1404 Refugee Branch	2202 Lebanon SSP
0401 Astoria SSP	1702 Cave Junction SSP	2601 St. Johns SSP
0903 LaPine SSP	1802 Lakeview SSP	3005 Boardman SSP
1102 Gateway Center	2003 Cottage Grove SSP	3201 Florence SSP
1201 John Day SSP	2101 Newport SSP	3301 The Dalles SSP
1402 New Market Theater	2201 Albany SSP	3302 Hood River SSP

## 90% or Better

96.55 NE Processing Ctr	2803	92.86 Rogue Family Center	1505	90.00 Integrated Services SSP	0702
95.00 Keizer SSP	2405	92.86 West Eugene SSP	2002	90.00 Redmond SSP	0902
94.74 Corvallis SSP	0201	92.59 Klamath Falls SSP	1801	90.00 Medford SSP	1501
94.29 D4 Processing Ctr	2203	92.59 McMinnville SSP	3601	90.00 Prineville SSP	1601
94.12 Metro Proc Center	1403	91.30 Woodburn SSP	1901	90.00 Tillamook SSP	2901
93.33 Grants Pass SSP	1701	91.18 South Salem SSP	2401	90.00 Milton-Freewater SSP	3004
93.33 Dallas SSP	2701	90.00 St. Helens SSP	0501	90.00 D2 ERDC Proc Center	3503
		90.00 Alberta SSP	0701		

### Don't Forget to use WQY2!!

If you are having trouble clarifying a discrepancy between client reported SSA income and the amount listed on the SSA screens, don't forget WQY2!

W204 by itself will only show one Social Security claim, even if clients receive benefits from multiple claim numbers.

\*When verifying Social Security information, you should start with WQY2,SSN# to search for information.

\*Selecting your client from WQY2 will list any associated claims.

\*You will need a TPQY request for WQY2 to update (usually received back within 2 working days), but the info you receive will be priceless.

*Quality Control*



**Did you know...** when working a CAPI application, narrating within the CAPI program is sufficient and meets SSP narration guidelines? You do not have to narrate in both CAPI and TRACS, you have a choice!

- You may choose to narrate only in CAPI. You will need to create a TRACS narrative referencing the CAPI application tracking number (located at the top of the CAPI application). This will allow others to find the information, if needed. Example: "CAPI recert completed, tracking #1234567." **OR**
- You may narrate completely in TRACS, **OR**
- You may narrate in CAPI and cut and paste your narration into TRACS

*Jeremy Steele, Field Service Analyst*