



January 2011

# SPD Field Services:

# In the Loop

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## Modernization project update

*Heather Williams, SPD Business Transition Coordinator/Trainer*

As of mid-January, we have received over 4,000 online SNAP applications, nearly 200 of those were from SPD applicants. The recertification letter mail-out project which informs clients of the online option has definitely increased the flow; in fact, over 500 were received in one week alone! SSP is still receiving the majority of the online applications, but SPD numbers are slowly increasing. We currently have 36 of 47 SPD branches active in CAPI, that's 77% - we're nearly there!



Release 2.4 was implemented on January 20<sup>th</sup>, which changed the wording of the disability question. Hopefully this will reduce the number of routing errors due to applicants misinterpreting what DHS considers a disability. For a complete list of the changes to CAPI and the Online Application in Release 2.4, visit the Modernization web site and click on 'Updates to CAPI & Online Application' under 'Release Notes'. <http://www.dhs.state.or.us/modernization/>

A client survey was also added to the end of the application for applicants who would like to provide feedback on their experience with applying online.

There have been some changes to some of the important dates we've been talking to staff and management about – the URL (web site address) will not be added to the auto-generated SNAP recertification letters until the April mailing. Also, the check boxes and additional disclosures for medical and other DHS programs will be added in March or April (tentatively).

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**Supporting SPD/AAA Field structure by providing efficient, timely and accurate information through superior customer service.**



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After training staff all over the state and listening to the feedback around CAPI we have been having discussions about how we may want to utilize CAPI. We will continue to gather information and will keep you updated on any changes in our policies, procedures and develop best practices surrounding CAPI and how it will be integrated with our work flow. Jennifer and I would really like to encourage you to contact us with any comments, concerns, suggestions, issues, etc. you may have with CAPI and/or the Online Application. We are committed to keeping the field involved in decision-making, so please talk to us!

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### SPD Field Services web site

On the SPD staff tools web site, under the Quick Links header, is a link to the new SPD Field Services web site. The new web site has lots of information to help get the work done in the field and keep everyone informed.

One thing you will find is a link to the previous *In the Loop* newsletters and an index by topic of the articles. Look for this edition of the newsletter to be online soon! There is also information on processing reports sent from SPD Central Office to the field and as much information as possible on when the reports are sent to the field so you know what to look for and when.

If you are looking for help to avoid SNAP errors, there is a section for that as well as information on identifying MAA cases so you can get them over to the local CAF office.

Transmittal summaries and meeting agendas will be posted as they are available to help keep you informed.

If you find an error, think of something that is missing which could be useful, or just have a constructive comment, send an email to [Karen Gulliver](mailto:karen.l.gulliver@state.or.us) at SPD Field Services [karen.l.gulliver@state.or.us](mailto:karen.l.gulliver@state.or.us)



### View Direct help

SPD-AR-10-120 announced View Direct (sometimes called RD2) reports would no longer be printed centrally but would be available for printing locally, as needed.

Since the transmittal was issued, several people have asked for help with printing and access. Here are some resources to find the information you need:

- Review the printing instructions on the [SPD Field Services web site](#);
- Contact your local staff expert is who usually prints the View Direct reports for assistance;
- If neither option works, contact the DHS Service Desk!

# EPD

## Working clients with disabilities

Did you know applicants and clients who work or go to work can earn more than \$675.70 per month and still be eligible for OSIPM? SPD offices sometimes incorrectly deny applications for benefits from individuals who claim to be disabled and earn more than \$675.70. The truth is that through the Employed Persons with Disabilities (OSIPM-EPD) program, clients who have or claim to have a disability can earn in excess of \$4,599 per month and still be eligible for medical benefits.

*Example:* an individual contacts a local office to ask for medical benefits. The individual claims to have a disability and also says she is employed. She is earning \$3000 per month. She has \$500 in unearned income. In order to be referred to PMDDT, the client must have adjusted earned income lower than \$2257 per month (not \$675.70 as is sometimes believed).

To determine if the person has adjusted income below \$2257 for EPD purposes, first exclude all of the client's unearned income. From the \$3000, subtract \$20, then \$65 (if the client is not blind) or \$85 (if the client is blind). Then deduct half of the remainder, and deduct any expenses that can be classified as Employment and Independence Expenses (EIEs), Impairment Related Work Expenses (IRWEs), or Blind Work Expenses (BWEs). The remainder is adjusted income.



So in this case, the client's countable earned income is \$3000, but after using the above deductions, the client's adjusted income is \$1457.50; well below the \$2257 adjusted income standard, but well above \$675.70. So this client would be referred to PMDDT, even though her income is greater than \$675.70.

You can find more information about the EPD program in the [EPD worker guide](#). If you have not attended, you may also want to talk to your manager about attending the EPD training, offered at the Cherry Avenue Training Center on a quarterly basis. If you have questions, you can contact Jeff Stell, SPD Medicaid Program Analyst, by GroupWise or by email at [jeff.stell@state.or.us](mailto:jeff.stell@state.or.us), or by phone at (503) 945-6834.

## Tips for accessing The Work Number

If you haven't received your user name and password from The Work Number, check your inbox, spam and trash. These email generally come from [VerifierID@theworknumber.com](mailto:VerifierID@theworknumber.com).

Both user name and passwords are case sensitive. Manually enter your OR# or P# and ensure the "O" and "R" or "P" are capitalized and you have the correct number of zeros. You can copy and paste your temporary password.

To request or reset your user name/password, contact your local security sub administrator.

# Translation services

## Translation service narration

A recent audit discovered the use of translation services for which the department has a cost are not being narrated consistently. This means when an auditor attempts to match a billing statement to a client, there is no narration explaining why, when, or what type of translation was needed. Without a record the auditors may have to cite a discrepancy.

For instance, if you have a client who needs to have a Bosnian translator and you are able to use Language Link, there should be a notation in the narration that says Language Link was used for a Bosnian translation and when. The note will align with a billing statement and verify the reason for the charge. Narrations should be added for any translation service the department pays for such as Language Link, forms translation and in person translators. See SPD [Worker Guide A.2](#) Alternate Format and Interpretation/Translation Services for more information.

If you are able to use a person in the office to help with translation, there is no need to narrate anything. If you are in a AAA office, please check with your local manager to see what additional procedures your offices uses.



## December 2010 SNAP honor roll

### 100% Accuracy!

0310 Canby SPD	100%	2019 Cottage Grove AAA	100%
0511 St. Helens SPD	100%	2518 Portland West ADS	100%
0911 Bend SPD	100%	2911 Tillamook ADS	100%
1311 Burns SPD	100%	3111 LaGrande SPD	100%
1612 Madras SPD	100%	3211 Florence AAA	100%

### 90% or Better Accuracy!

0914 Redmond SPD	96.00	2311 Ontario SPD	93.33
1717 Grants Pass DSO	96.00	3013 Hermiston SPD	93.33
2411 North Salem ADS	96.00	3311 The Dalles SPD	93.33
3417 Beaverton SPD	96.00	2011 Eugene LCOG	92.50
3518 Portland ADS	96.00	1011 Roseburg SPD	92.00
3617 McMinnville ADS	96.00	1811 Klamath Falls SPD	92.00
0310 Canby SPD	93.33	3411 Hillsboro SPD	92.00
0313 Milwaukie SPD	93.33	2412 South Salem ADS	91.67



# Training

## Train without leaving home!

Increased workloads and decreased travel funding means most workers have not been able to attend classroom training for a while. There are alternatives to classroom training – have you tried online training?

Online training is *not* Netlink. It's a self-paced computer based training you take at your desk when you have the time and approval to do so – it's your schedule. The information is presented in a quick series of screens followed by testing your comprehension. Most online course take about 20 minutes or less and you can start, stop and go back if you need to – you can even take the same course several times as a refresher. Plus, you get credit for the class!

If this is new to you, or you haven't looked at online training for a while, go to the [DHS learning center](#) and type in a keyword to see the choices; online classes have a hyper link. Here are just a few of the classes offered:

- Lean thinking (C01671)
- MMIS plan of care for the local office (C01275)
- CAPI casework Module One, my schedule queue (C02007)
- Food stamp overview (C00286)
- DHS core values (C00756)
- Health insurance group (C00485)
- Privacy, security and you, part I (C00238)
- Spread the word not the germs (C01475)
- Transformation awareness (C01465)



## Supplemental UC ended

As many of you know, several provisions related to the American Recovery and Reinvestment Act of 2009 (ARRA) ended in 2010. The \$33 earned income exclusion ended at the end of December, 2010. But did you also know the provisions related to the \$25 supplemental Unemployment Compensation (UC) payment ended in mid-December?

For SNAP and SPD-related medical programs, if eligibility has already been determined using the \$25 UC exclusion, no action is needed on the case until the next recertification or redetermination of eligibility. If you have questions, you can refer to the informational memorandum:

<http://www.dhs.state.or.us/policy/selfsufficiency/publications/ss-im-11-001.pdf>

If you need additional assistance, you can contact Jeff Stell, Medicaid Policy Analyst, by GroupWise, by e-mail at [jeff.stell@state.or.us](mailto:jeff.stell@state.or.us), or by phone at (503) 945-6834.



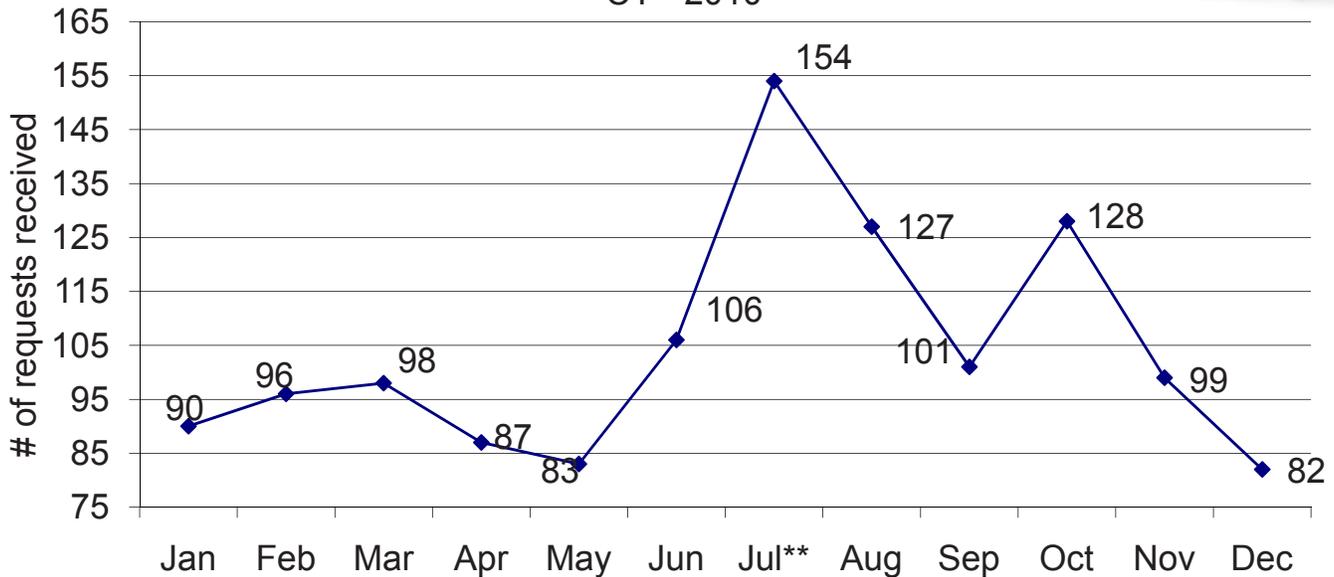
## February 2011 training calendar

Monday	Tuesday	Wednesday	Thursday	Friday
	<p>1</p> <p>CBC: 512 (8:30 - 4:30)</p> <p>MMIS data inquiry and update (1:30 - 4:30)</p>	<p>2</p> <p>DD eligibility - new rule changes (8:00 - 4:00)</p>	<p>3</p> <p>MMIS plan of care for SPD case managers (1:30 - 3:30)</p> <p>MMIS data inquiry and update (1:30 - 4:30)</p>	<p>4</p>
<p>7</p> <p>Eligibility 201 (1:00 - 4:30)</p>	<p>8</p> <p>Eligibility 201 (8:00 - 4:30)</p> <p>MMIS plan of care for SPD case managers (1:30 - 3:30)</p> <p>MMIS data inquiry and update (1:30 - 4:30)</p> <p>CEP specialist training (8:30 - 4:30)</p> <p>Netlink: Transition planning and risk assessment (1:00 - 4:00)</p>	<p>9</p> <p>Eligibility 201 (8:00 - 4:30)</p> <p>Basic Lean tools (8:30 - 4:30)</p>	<p>10</p> <p>Eligibility 201 (8:00 - 4:30)</p> <p>Cultural competency and diversity (8:30 - 4:00)</p> <p>Netlink: Transition planning and risk assessment (1:00 - 4:00)</p>	<p>11</p> <p>Eligibility 201 (8:00 - 12:00)</p> <p>Cultural competency and diversity (8:30 - 4:00)</p>
	<p>15</p> <p>Oregon Access basics (8:30 - 4:30)</p>	<p>16</p> <p>Oregon Access basics (8:30 - 4:30)</p>	<p>17</p>	
<p>21</p> 	<p>22</p> <p>Advanced Lean tools training course (8:30 - 4:30)</p>	<p>23</p> <p>Netlink: Transition planning and risk assessment (1:00 - 4:00)</p>	<p>24</p> <p>Netlink: Transition planning and risk assessment (1:00 - 4:00)</p>	<p>25</p>
<p>28</p> <p>Cultural competency and diversity (8:30 - 4:00)</p>				

*Dates and availability of classes are subject to change. Please review availability on the [DHS Learning Center](#).*

# Hearings

Hearings Received & Assigned  
CY - 2010



	Food Stamps	Medicaid eligibility	Over-payment	PMDDT	Services	Other	DD case	UI
January	11	15	18	25	13	3	5	13
February	15	22	17	19	19	1	3	8
March	19	19	11	25	18	4	2	7
April	19	30	7	14	14	2	1	5
May	22	15	7	15	18	3	3	13
June	11	23	13	28	25	3	3	10
July	18	20	9	26	25	2	2	7
August	17	47	6	20	26	2	8	14
September	19	26	8	19	18	1	10	12
October	19	29	10	25	27	6	12	10
November	15	21	5	20	19	3	16	10
December	10	22	5	20	20	2	3	7

## Central Office Field Services team

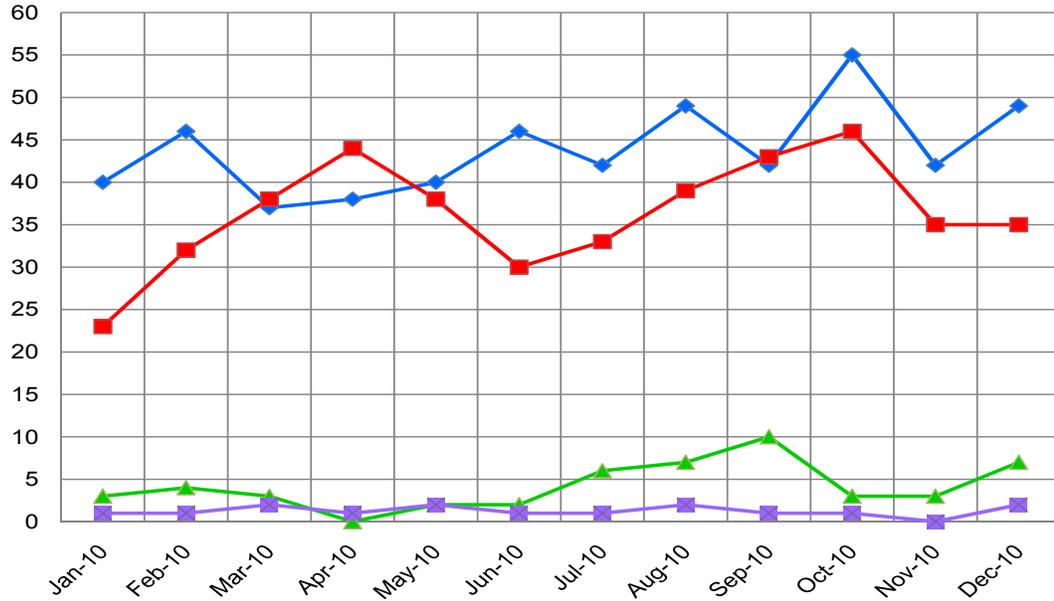
Angela Munkers - Field Services Manager  
 Sandy Hata - Transition Services Manager  
 Carol Mauser - Operations Manager  
 Jennifer de Jong - SPD Modernization  
 Program Business Transition Manager  
 Caryn Whatley - Policy Analyst  
 Heather Williams - Training and  
 Development Specialist

Debbie Harms - Executive Support  
 Nathan Singer - Transition Services  
 Karen Gulliver - Quality Assurance  
 Janet Morse - Administrative/Technical  
 Assistant and Hearings Coordinator  
 Tammy Mazon - SNAP Outreach/ OSH  
 Financial Eligibility



# Exceptions

Exception requests - 2010



	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10
AFH	40	46	37	38	40	46	42	49	42	55	42	49
In-home	23	32	38	44	38	30	33	39	43	46	35	35
RAFH	3	4	3	0	2	2	6	7	10	3	3	7
RCF	1	1	2	1	2	1	1	2	1	1	0	2

## February 2011

Boost self-esteem month  
 Care about your indoor air month  
 Spunky old broads month

Feb 1 - 7: Women's heart week  
 Feb 7 - 14: Risk awareness week  
 Feb 14 - 21: Dementia awareness week

Feb 1: Freedom day  
 Feb 2: Groundhog day  
 Feb 4: World cancer day  
 Feb 8: Extraterrestrial culture day  
 Feb 11: National shut-in visitation day  
 Feb 13: Man day

Feb 14: National have a heart day  
**Feb 21: President's Day - CLOSED**  
 Feb 20: Northern hemisphere hoodie-hoo day  
 Feb 23: Inconvenience yourself day

## ICP opportunity

Independent Choices participants and representatives are now eligible for **STEPS to Success**. **STEPS** topics include hiring, training, supervising and communicating effectively with employees. For more information, go to <http://www.oregon.gov/DHS/STEPS/> or call Suzanne Huffman, (503) 373-1078.



**Don't forget!** The effective date for OHP-OPU is the date of request established by the applicant NOT the mail or selection date. The date of request can be established as soon as the client is selected; check the [OHP Reservation list database](#) for an applicant's status!

# Modernization

## CAPI narration tips

There has been a lot of discussion lately about maneuvering between CAPI and OACCESS. It is true we hope to eventually streamline the number of systems where client information is contained, the reality is at least for now, we must continue to use the resources we're currently working with. More importantly, the requirements for narration have not changed with the emergence of the online application and CAPI ;all information that was previously required when narrating a traditional SNAP application is still required with applications completed online.

In CAPI, the SNAP application is separated into 7 different sections, or tabs – Application Information, Household Composition, Income, Individual Deduction, Household Deductions, Eligibility, and Narrative. The first 6 sections contain a text field where caseworkers can narrate the results of the interview pertaining to the respective sections or tabs. The last tab contains a compilation of the caseworker narrative (as well as some auto-narration that CAPI provides) separated and labeled by section.



Because we are still expected to utilize OACCESS, this has created some concerns about redundancy in work, particularly with narration. CAPI does have a feature which allows users to copy the completed narrative to a clipboard and then paste directly into OACCESS; however, narrating in CAPI is much different than narrating in OACCESS. Many caseworkers use the existing template or have created their own. For those who have become accustomed to narrating in CAPI, a simple copy-and-paste using the 'Copy Narrative' button should be sufficient (as long as all the required information is included). But the dilemma still exists for the rest – is it really necessary to narrate completely in CAPI and then narrate again in OACCESS? The short answer is no! There are some tricks to avoiding extra work and redundancy - here are a couple of the methods caseworkers are using:

- Narrate in the Eligibility tab in CAPI the application narrative can be found in OACCESS;
- Copy and paste the narrative created in OACCESS or in another template into the narrative field on the Eligibility tab in CAPI.

*Note: Because the Eligibility section narrative appears at the top in the final product, this will be the first thing anyone viewing the application narrative in CAPI will see. Don't worry that it won't fit; it may look small but it can actually hold quite a bit of text.*

An advantage of utilizing CAPI when processing applications is the information will be accessible to both SSP and SPD staff without the hassle of finding someone in the SPD or SSP branch to print out the narration or photocopy the application; however, until our goal of streamlining systems is realized, we need to come up with ways to balance the advantage of increased online access to our clients and the extra steps CAPI requires. Whatever method you decide works best for you, the important thing is to document for others who may need to view the application at a later date where the information can be found – no one wants errors but most of all, no one needs extra work!

Heather Williams, Business Transition Coordinator/Trainer