

# *In the Loop*

## **Homecare worker appreciation day in District 12**

District 12, which includes SPD offices in Pendleton, Hermiston and Milton-Freewater, hosted their first annual Homecare Worker Appreciation day in their offices this month.

As a way to recognize the dedication of homecare workers and the hard work they all do for our clients, staff in all the District 12 offices served cake and expressed their thanks.

Check out these great photos – great “Thank you/Gracias” banner in Hermiston!



L-R: Gary Studebaker, Lori Quintero, Nancy Hamm, Diana Bartholomew, Dessa Myrick, Susan Jones - Pendleton



Margarita Zaragoza - Milton Freewater SPD

Nicely done District 12 – thank you for sharing with us. Your homecare workers are lucky to have you!

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

## Practicing LDMS

The support staff at the Hillsboro Senior and People with Disabilities office received Lean Daily Management Systems (LDMS) training from Sudha Ramakrishnan in December of last year.

Our team had implemented daily huddles and the primary visual display board in March of last year, but we requested training to help us use our display board and huddle time more effectively. Little did we know that we would learn much more during our LDMS trainings.

Since December we have redesigned our primary visual display board to meet the needs of the group. We have also created a daily huddle agenda to help keep the huddles on track and more efficient. The team has also started working with continuous improvement sheets, 20 keys, and continuous improvement (CI) meetings.



L-R: Loyce Edwards, Lisa Leibham, Rose Lane Caldwell, Valentino Carrea, Susan Gardner, Alma Gonzalez. Not pictured: Ofelia Heredia, Connie Cruz, Kasie Gonzales.

The challenge with our team is that no one has the same set of duties. The team includes reception staff, administrative support, case aide, HSS1/outreach specialist, and branch support staff. We discovered during our LDMS training that cross-training was the biggest area that we needed to work on. During our CI meetings we have used the skills versatility matrix to evaluate several duties to determine where we could improve on cross-training within the group. By looking more closely at our work processes we have also been able to eliminate repeated work.

Although we are still learning how to apply LDMS to our daily work the group is starting to embrace the ideas of LDMS. I look forward to watching the team grow and develop into an even more efficient team.



Lisa Leibhman

*Lisa Leibham, Administrative Specialist 1/ Lead worker, Hillsboro SPD*

 **Don't forget!** When a client passes away, be sure to end all benefits for the deceased person – including their SNAP benefits – and integrate with the mainframe so the payment systems know the client has died. Add the DoD (date of death) to prevent any more notices going out (be sure to integrate). Also, if there is a service exception on the case, don't forget to send a quick email with the client's date of death to the exceptions mail box: [Exceptions, SPD](#).

Looking for past issues of *In the Loop*? Wish there was an index of articles? Find both on the SPD Field Services web page: <http://www.dhs.state.or.us/spd/tools/field/index.htm>

### CBC prorated payment calculation

When a client was not in care for an entire month, figuring the correct payment to a provider can be tricky... With so many different numbers on the 512, it's a wonder anyone can figure it out! However, figuring the prorated payment is important not only to communicate the correct payment amount to the provider, but also to make sure adjustment requests are submitted with the necessary information.

To figure the calculation correctly, you will need to know the client's monthly service contribution and monthly client service contribution. These are found in the client's 512, on the DISB screen (shown below). To settle any dispute out there, below is the official calculation for prorating payment:



**1. Monthly service rate; divided by the # of days in the month:**

Ex:  $1491 / 31 = 48.10$  (per-day rate)

**2. Per day rate; multiplied by # of days in the home:**

Ex:  $48.10 \times 23 = 1106.30$  (total owed to the provider)

**3. Total owed to the provider; subtract the monthly client service contribution:**

Ex:  $1106.30 - 261.48 = 844.82$  (total the State is to pay)

DISB		SDS CBC PAYMENT SYSTEM			LAST CHG 2010/08/03	
ACT TYPE 4	OPER ID	CANCEL	N	MODE	COMP	
EFF BEG 2010/01/01	EFF END 2010/07/31	SVC WKR		FINC WKR		
PRIM ID	RECIP					
PROV NMBR	PROV NAME			2ND PROV N		
BEG WVR 2009/11/01	WVR (CMS) Y	BUY IN: (SEND TO)	RECIP N	RESP N		
END WVR 9999/12/31		(DATE) 0000/00/00	PROV N	RSRC N		
(CLIENT)		(PROVIDER)				
RSRC TOT (INCOME)	1,046.00	RM / BRD	523.70			
		<b>SERV AMT</b>	<b>1,491.00</b>			
RM / BRD	523.70	TOT DUE		2,014.70		
PER ALLOW	0.00					
NEED TOT	108.82	CLNT PAY	785.18			
		ST PAY	1,229.52			
		TOT DUE		2,014.70		
<b>SVC CNTRB</b>	<b>261.48</b>					
		DHR = 2	ADDR = A			
SEND TO: RECIP 0	RESP 0	PROV 0	RSRC 0	FILE 0	LOCAL = 1	BRANCH = B
					(PRINT) LOCN 2	DEST A
MSG: SI007 Print a copy of the 512 COMPLETED record?						ANS: N
MSG: S-022 Select copies to be printed and answer Y to print						
MSG: S-018 Next screen? (N or Trnid)						

## SNAP policy changes to Periodic Income – reminder!

Effective April 1, 2011, a change was made to SNAP/TANF policy in Rule [461-140-0110](#) and CA A-6. For those clients who do not have a member working under a TANF JOBS Plus agreement, periodic income is averaged over the months the income is intended to cover. While this change applies to any SNAP or TANF client receiving periodic income, the group who may be most affected by this change are tribal members receiving countable tribal income, as an example, from casino profits.

The option for the client to count the income in the month it is expected to be received has been removed. The option for clients to have a choice was not required in federal policy. The state determined that allowing the option created problems with reporting systems which resulted in errors and a loss of benefits to clients who may have had their case closed for a month and not requested continuation of benefits timely. The policy unit looked at actual cases before making the final decision and determined that about 80% of households received an increase in benefits using the averaging method.



SNAP policy analysts

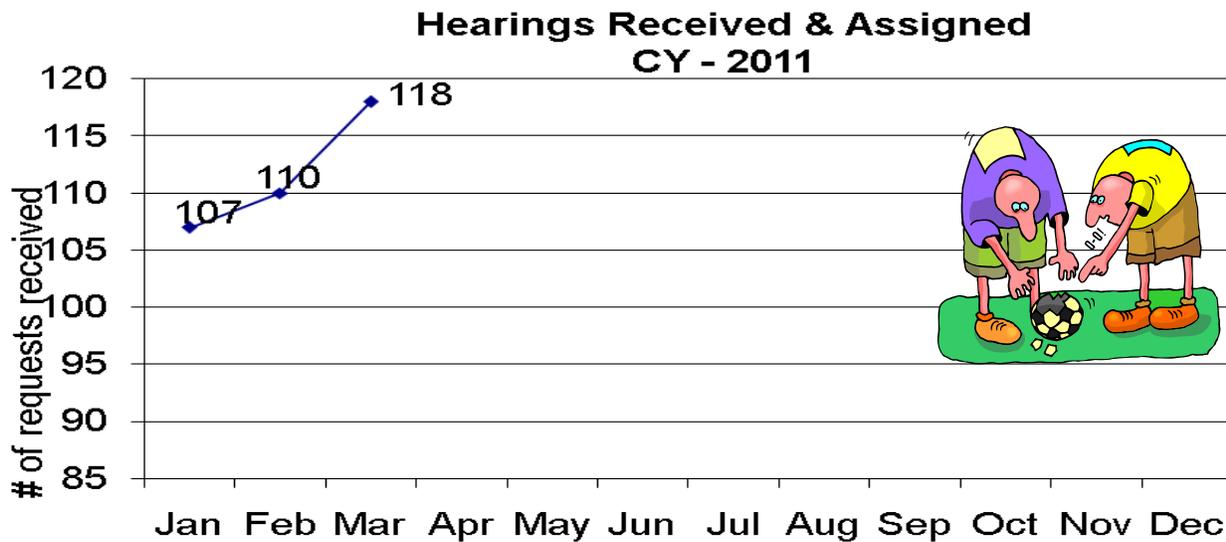
### March 2011 SNAP honor roll

#### 100% Accuracy!

0111 Baker City SPD	100%	1517 Medford DSO	100%
0311 Oregon City SPD	100%	1611 Prineville SPD	100%
0313 Milwaukie SPD	100%	1811 Klamath Falls SPD	100%
0411 Warrenton ADS	100%	1911 Woodburn ADS	100%
0913 LaPine SPD	100%	2411 North Salem ADS	100%
0914 Redmond SPD	100%	3013 Hermiston SPD	100%
1211 John Day SPD	100%	3112 Enterprise SPD	100%
1311 Burns SPD	100%		

#### 90% or Better Accuracy!

2518 Portland West ADS	96.00	2311 Ontario SPD	93.33
2412 South Salem ADS	95.65	2711 Dallas ADS	93.33
3518 Portland ADS	95.65	2911 Tillamook ADS	93.33
0911 Bend SPD	94.44	3211 Florence AAA	93.33
0314 Estacada SPD	93.33	3311 The Dalles SPD	93.33
0511 St. Helens SPD	93.33	2211 Albany ADS	92.00
1011 Roseburg SPD	93.33	3515 Portland ADS	92.00
2011 Eugene LCOG	93.33	3111 LaGrande SPD	90.92



	SNAP	Medicaid eligibility	Over-payment	PMDDT	Services	Other	DD case	UI
January	12	29	7	27	19	3	10	11
February	14	26	8	27	21	6	8	4
March	17	24	8	40	23	1	5	15

### Keep it confidential

Sometimes, in the earnest desire to help, staff actually violate client’s privacy rights. For instance, a person walks up to the front desk and says they need to talk to their mother’s worker. The staff person asks for the mother’s name and then says the worker’s name is Joe Whomever, but he’s busy right now – can they wait?

The random person who just walked in off the street now knows the woman they identified as “mom” is receiving DHS benefits – meanwhile we have no idea who the person asking is or whether they have any right to information about any of our clients.

This also happens on the phone. Workers get calls from people claiming to have a family member or loved one on benefits and the workers divulge all kinds of information – often without verifying who the person calling is or if they are an authorized person on the case who is allowed to discuss any details.

It’s hard not to help a person in front of you or on the phone who seems genuinely concerned, but part of our job keeping clients safe is making sure their private information stays private. Talk with your local management team and co-workers to create strategies to avoid privacy violations while continuing the stellar job you do every day!



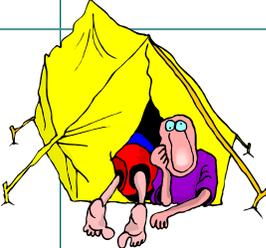
### Don’t forget!

If you have problems adding the NED code to an open SNAP case, contact either the [SNAP policy analysts](#) or business analyst [Lisa Stegmann](#), 503-945-6725. Adding the NED often takes more than once step and either option can help you.

**Correction!** 2211, Albany ADS was omitted from the February Honor roll - they were at 92%!



May 2011 training calendar

Monday	Tuesday	Wednesday	Thursday	Friday
2 Cultural competency and diversity (8:30 - 4:00)	3 Basic Lean tools (8:30 - 4:30)	4 DHS/OHA lean conference 9:00 - 4:00	5 DHS/OHA lean conference 9:00 - 4:00	6
9	10 Eligibility 101 (8:30 - 4:30) Supervising to strengths module V (1:00 - 5:00)	11 Eligibility 101 (8:30 - 4:30)	12 Eligibility 101 (8:30 - 12:00) Cultural competency and diversity (8:30 - 4:00)	13 Cultural competency and diversity (8:30 - 4:00)
16	17 Strengthening case management module II (8:30 - 4:30) Netlink: Writing a good decision notice (1:00 - 4:00)	18	19 Netlink: Payroll reporting for new employees (1:00 - 4:00)	20 <b>CLOSED</b>
23	24 Oregon ACCESS basics (8:30 - 4:30) Strengthening case management module II (8:30 - 4:30)	25 Oregon ACCESS basics (8:30 - 4:30)	26 	
30 <b>CLOSED</b> 	31		<p><i>Dates and availability of classes are subject to change. Please review availability on the <a href="#">DHS Learning Center</a>.</i></p>	

## Buy-in tips

There are several things field workers can do to make Medicare buy-in work more efficiently. Here are a few:



- If the client is eligible for Part A buy-in, the worker must call the buy-in unit because Part A Buy-in is a manual process done by the buy-in unit. A Z99 code on a SSA screen **DOES NOT** mean a client has Part A. Also don't code cases QMM until they are receiving Part A as they aren't eligible for QMB-BAS until the month after they actually receive it. For more information see [QMB WG-4](#).
- To avoid name mismatches, use the name as it appears on the Medicare card. The client may want to be called something else, but let them know we need to use what CMS has on record or we can't pay for their Medicare premium. They can ask Medicare to change their name and we can match it when the change is made.
- When a client has benefits on two accounts, always list the account that's in the client's name first in the Need/Resource area. For instance if a client is receiving C1 benefits from a parent and some benefits in their own right, list the benefits in their own name first.
- Valid Medicare numbers never end with HA or DI.

Hundreds of buy-ins don't go through every month, with the name and account number mismatches leading the way in preventable causes. Help us help the client and prevent workload both in central office and the field with these easy to do data entry tips.

*Dale Marande, SPD Medicaid Analyst*

## Are you a hunger champion?

The federal Food & Nutrition Service (FNS) is once again asking local SNAP offices to nominate themselves as Hunger Champions. To be a champion, your office must have provided exemplary service in helping clients obtain SNAP benefits.

The nomination for your office should state clearly and briefly how you have helped increase access to the program. Details may include such things as partnerships, process improvements, targeted help for specific groups, helpfulness of staff, timely processing, etc. You must also include a contact name, title, e-mail and phone number. The limit is one page.

Branch offices will be selected by a national committee based on outreach, access and customer service. Winners will be announced at the 2011 State SNAP Directors conference. All Hunger Champion nominees will be recognized with a certificate and will be listed as exemplary offices on the FNS web site

Send your nominations to Sandy Ambrose at [sandy.ambrose@state.or.us](mailto:sandy.ambrose@state.or.us). She will complete and submit your nomination on-line. The deadline for entries to Sandy is June 1.

Any questions can be directed to the same e-mail. Let's get Oregon some more of the recognition we so richly deserve!

**May 2011**

ALS awareness month  
 Arthritis awareness month  
 Strike out strokes month

May 1 - 7: National pet week  
 May 8 - 14: National nursing home week  
 May 21 - 28: Cover the uninsured week

May 1: World laughter day  
 May 2: Melanoma Monday

May 8: Mother's day

May 17: World hypertension day

**May 20: CLOSED**

May 25: Senior health and fitness day

May 28: Slugs return from Capistrano day

**May 30: Memorial Day - CLOSED**

May 31: World no-tobacco day

**New applicants for expedited SNAP**

All new SNAP applicants are potentially eligible for expedited benefits and must have an expedited eligibility screening; a new applicant is a person who does not *currently* have an open SNAP case.

If the person applying had SNAP benefits last month and he did not establish a filing date until after the expiration date, he is considered a *new* applicant and must be screened for expedited SNAP eligibility on their filing date.

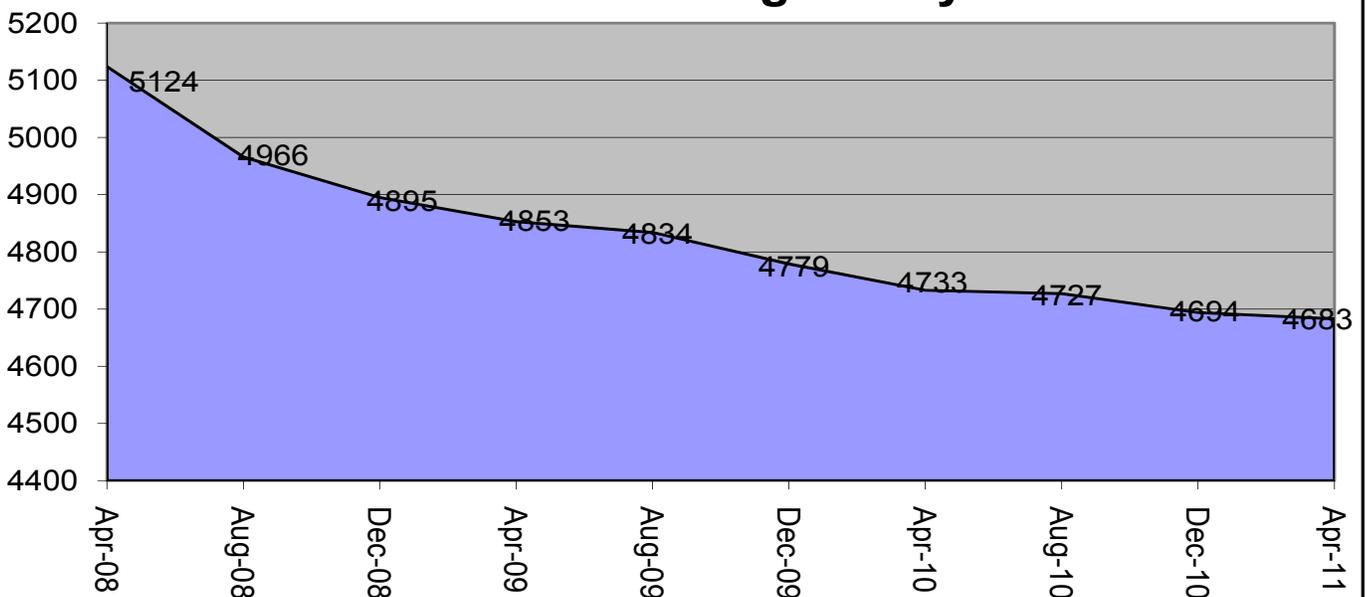
Medicaid and service clients who are applying for SNAP for the first time are *new* SNAP applicants and also are entitled to an expedited determination. Eligibility for other programs does not make them an ongoing client for SNAP.

All expedited eligibility determinations must be tracked and the "X" *Rel ATP* code should be used to issue benefits. If you are using the current version of the SDS 539H (web link in OACCESS; sidebar will fill in) expedited determination boxes are at the top of the form to help you remember.



**Don't forget!** Each time you act to change a client's case there should be a narration explaining what you did and why you did it - especially when any action is done around eligibility. Remember, if it isn't narrated, it didn't happen.

**Statewide nursing facility numbers**



## Modernization

We've been trying our best to keep you updated on what's happening with CAPI and the Online Application, but I thought it might be a good time to give a quick update on how the other three Modernization projects are progressing.

### **Eligibility Automation:**

Market research continues to narrow in on the best solution for DHS/OHA. The Health Insurance Exchange (HIX) and Modernization teams will work closely together on the purchase of software used by both projects. OHA has been granted \$48 million from the Department of Health and Human Services to provide Oregonians with access to health benefits through an online health insurance exchange.

### **Telephony:**

Ten site visits have been completed to gather information regarding current intake processes and telephony usage. Ideas were gathered from the field regarding how telephony can help them. Suggestions are encouraged through the Telephony Field Feedback/Suggestions from on the Modernization website. Please share your thoughts!



### **Replace/Modernize Legacy Systems:**

In order to support Eligibility Automation, we are working with CAF and SPD system experts to analyze and map existing Legacy systems and their interfaces with other systems. This information will help us determine whether to re-use, upgrade, or retire these systems as part of Eligibility Automation.

### **Important information about the Online Application and medical benefits!**

It was pointed out during a recent training session the Online Application only allows for one signature; however, SPD medical applications require a signature from both spouses when married individuals apply. This policy may change in the summer or fall. Until that time, please continue to use the SDS 530 to obtain the second signature. Please note, this is only required for new applications, it is not necessary to obtain a second signature for medical redeterminations.

Release 2.7 was successfully deployed on April 21 and included some much-needed changes to the Online Application and CAPI. Some notable changes to CAPI include the addition of a column in the Unassigned Applications queue that shows the applicant's interview preference and the renaming of the Scheduled Appointments queue, the VIEW button in the Missed Appointment queue, and the MISSED APPT button at the bottom of the Missed Appointments queue. To see all the changes made in Release 2.7, please visit the Modernization website and click the 'Release Notes' link on the right-hand side of the page. A link to the Modernization website is below: <http://www.dhs.state.or.us/modernization/>

*Heather Williams, Business Transition Coordinator/Trainer*

### **CAPI tip of the month:**

You can open and edit a processed Online Application from the Statewide Search results list, but only if the application was processed in your branch and you have view/edit rights.

## Upcoming changes to Quality Control negative action reviews

The Food and Nutrition Service (FNS) has made changes to the SNAP Quality Control (QC) review process conducted on denied, closed or suspended cases. These are known as negative case reviews in QC. The changes will be effective October 1, 2011 but QC wanted to get the word out early to help offices understand the impact. While October may feel like a long way away, it will be here before we know it.

QC is currently sending out 372 “Information Only” reports to branch offices for incorrect notices and untimely processing as a “heads up” for the upcoming changes. In addition, QC is working closely with SNAP Policy to determine what is needed in preparation of the changes and ways to minimize the impact of these changes.



There are two major changes that are being made.

**The first change is all negative actions will be reviewed**, even if there is not a break in benefits. What does this really mean? Currently, cases that suspend because an Interim Change Report (ICR) was not processed timely are not reviewed by QC. As of October 1, 2011 these cases will be reviewed under the new federal rules. *Complete ICRs that come in before the last day of the month they are due will be cited as an error if they suspend because DHS did not process the report.* This is because we must review the action, and not the outcome. This action (the suspend) is incorrect because we had all the information prior to the end of the month.

**The second change is all incorrect notices to the household will be errors.** Currently, notices are not part of the QC review process. Beginning in October, if notices do not list the correct reason, rule number, etc, for the negative action, they will be cited as an error. If no notice is provided to the household as required, or if copies of manually generated notices are not available, these will be cited as errors as well. As a reminder, certain reason codes will, if appropriately coded, generate a denial notice for SNAP. The closure notices are manually generated or hand written.

While QC doesn't know yet what the full impact of these changes will be, it is anticipated the changes will increase our negative error rate significantly.

*SNAP policy analysts*

### 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  
 Janet Morse - Administrative/Technical  
 Assistant and Hearings Coordinator

Debbie Harms - Executive Support  
 Nathan Singer - Transition Services  
 Karen Gulliver - Quality Assurance  
 Heather Williams - Training and  
 Development Specialist  
 Tammy Mazon - SNAP Outreach/ OSH  
 Financial Eligibility