

In the Loop

Congratulations Klamath Falls!

Congratulations to the Klamath Falls Senior and Peoples with Disabilities office, branch 1811, for achieving an unprecedented “No Deficiency” rating in all areas on their recent SNAP Program Management Evaluation! The PME review assesses processes and procedures around Program Access, Civil Rights and Corrective Action.

Trina Lee, program manager for District 11, was presented with a certificate of accomplishment at the program managers meeting on July 13, 2011. The office staff celebrated in early July with an award and root beer floats provided by the PME reviewers and management will be providing a BBQ luncheon for staff soon.

To prepare for the review, office staff attended a presentation given by the PME reviewers in late January and identified areas needing additional focus. The lead worker, Alison West, was tasked with preparing a mini-training to improve their processes and procedures.



The staff and management are commended for their dedication to serving the people of Oregon with excellent customer service!

Many thanks from the PME Reviewers: Diane Niko, Christine Shaw, Pa Her and Ustina Zharkoff.

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

Have you met Wendy?

SPD has a new team member! Wendy Gibson joined the team for a six month rotation in April as the SPD Deputy Chief Operating Officer. She comes to us from Shared Services where she was the agency's business portfolio manager.



Wendy spent the past year managing the HB2009 Transition Project for DHS/OHA and managing the cross-organizational continuous improvement efforts. Previous to her work in continuous improvement, she was the deputy administrator of Communications for DHS. Prior to joining the agency, she was the Information and Education Division administrator for the Department of Fish and Wildlife. She holds a MBA in Business Administration from Portland State University.

In her new role with SPD, Wendy is focused on many tasks including position management, delegated authority and contracting authorities. In addition, she will be overseeing our project management and continuous improvement efforts.

Over the next couple of months, Wendy will make several field visits to get out and meet the staff and experience the work. She is looking forward to working with all of you, as well as our service delivery partners, in making SPD the best it can be.

On a side note, Wendy is looking for field staff that has an interest in continuous improvement and would consider joining the team. If you have an interest in serving on, or assisting, the CQI team, let her know. She'd love to have your help. Wendy can be reached at 503.945.5940 or by email at wendy.gibson@state.or.us.

Welcome to the team Wendy!

24 month SNAP cert coming soon!

The 24 month SNAP certification is not a myth - it is coming soon to your area! The SNAP Policy Analysts are hard at work on the rules and policies to make this a reality and the systems group is testing to make sure it all goes smoothly.

Although the details are still being finalized, we know the 24 month certification will be available for SPD and AAA offices only and will only apply to cases eligible for the NED household type code.

Watch for more information via transmittals; the tentative date to begin training is mid to late August - yes that soon!

Many thanks to the SNAP team for making this happen - this will be a tremendous work load saver for the field and we are all looking forward to it!



TTT (Train the Trainer) highlights

Below are some of the highlights from the July 23, 2011 Train the Trainer (TTT) meeting. More is discussed in the meeting, so please regard this as only a highlight. For more information on these issues or any others, please contact the SPD or SNAP Policy Analysts. To find out more about the TTT meetings, contact [Lauren Mitchell](#).

CREW:

- CREW is a full day this year with breakout min sessions on specific topics. Check the [Learning Center](#) in the Special Events section for the date in your area. See [SPD-IM-11-042](#) for more information.
- This year, CREW will add a separate half day mini session for SSP workers in Eastern and Southern Oregon covering SPD topics. SPD workers should *not* sign up for SSP sessions.



SNAP:

- If a case is in SRS, do not act on the FSMIS/Bendex discrepancy report. Workers should only be looking at the SSA payment discrepancies for cases not in SRS.
- Reverse mortgages for SNAP are considered a loan and are not countable.

Medicaid:

- The new rule which ties OHA and DHS together and makes our Medicaid rules valid must be added to all decision notices. The rule number is 410-120-0006. Work is being done to add the rule to all notices, but workers should double check the forms before sending to ensure the rule has been added. See transmittal [SPD-PT-11-007](#).
- Reverse mortgages received monthly or as a lump sum are not counted in the month received and are counted as a resource only in the second month, if the client has any of the money left.

Look for other TTT information also in this newsletter!

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 • 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>
 •



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

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

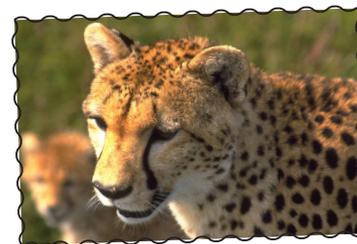
SNAP – questions from the field

Q: My client is receiving what he says are fixed monthly distributions from a retirement account and he only gets an annual statement. Is that sufficient verification?

A: If it seems reasonable, then a copy of the annual statement is sufficient verification even if it's many months old. If there is reason to believe the amount fluctuates from month to month, or that there may be a COLA, then current verification is needed. If the statement is not the most recent annual statement, then more current verification would be needed. If there is insufficient verification, then it would be an error for review and audit purposes.

Q: What does “changed source” for SNAP medical deductions mean?

A: On medical deductions. “changed source” means a different cost; e.g., a new doctor, new prescriptions, etc. A change of \$25 or more per month for the same source (e.g. insurance premiums) should be narrated. Generally, the worker needs to narrate enough so anyone looking at the case can figure out what they did and why. Usually the easiest way to verify prescriptions costs is with a printout form from the pharmacy. The narrative can refer to the list being in the file. Use the [221 MED](#) to help calculate.



Q: What is the current guidance on verifying income?

A: If the client is interviewed the month before expiration and provides income verification for the 30 day period prior to the interview, use it **IF** the client anticipates their income will remain the same. Do not pend for a later interview or later income verification. If you have a situation where a phone interview actually preceded the filing date, then you would need income verification up to the filing date.

May I suggest....Excel?

Microsoft Excel is a standard program for DHS computers and more and more reports are sent to the field in this format. Excel is also a very efficient way to create spreadsheets, tables and simple charts. Excel can do calculations and basic counts saving you potential math errors and eliminating tedious hand counting. Plus it's extremely easy to learn and use!

If you don't know how to navigate in or use Excel, check out the online training available on the [DHS Learning Center](#), course C02286. The course covers Microsoft Excel versions 2003, 2007 and 2010. You can work at your own pace at your own desk when you have time.

Once you get the hang of using Excel, I dare you not to find a use for it right away!



Medical marijuana – quick reminders

Some reminders for dealing with medical deductions for the *Medicaid* program related to medical marijuana – from TTT:

- Because buying marijuana is illegal, only allow the client to claim the cost of growing the marijuana; *not* the cost of purchasing the product.
- If a client is claiming the cost of growing and they also grow for up to three other people, divide the cost by the number of people and only allow their own cost.
- The person claiming the medical marijuana costs must have a current Medical Marijuana Card and/or a current grow site registration.
- Costs of materials needed to grow the medical marijuana are allowed – such as pots, plant starts, grow lights, soil and fertilizer. Material costs should not be necessary at the same volume year to year – the client probably will not need to buy a complete set of grow lights every year.
- Medicaid will allow the extra utility cost for growing medical marijuana if the client can provide proof. This means the client would need “before and after” utility statements directly correlating to the start of production.

Please contact your lead worker, manager or a policy analyst if you have specific case questions related to medical marijuana as a medical deduction (no “what if” and “how about” please!).

For questions related to SNAP eligibility and medical marijuana, see [SNAP. F. 19](#) or contact a [SNAP policy analyst](#).

Fair housing: protections and resources for your clients

Fair housing laws protect against discrimination in housing based on:

- Race, color, national origin (Federal);
- Religion (Federal);
- Gender (Federal);
- Familial status -children under 18 (Federal);
- Disability (Federal);
- Marital status (Oregon and Washington);
- Sexual orientation (Oregon and Washington);
- Domestic violence survivors (Oregon and Washington);
- Legal sources of income (Oregon); and
- Honorably discharged/military status (Washington).



The Fair Housing Council is a nonprofit organization serving Oregon and South West Washington. For more information on each of the above visit www.fhco.org.

Anyone may call the free Fair Housing hotline at 800-424-3247 Ext. 2 or visit www.fhco.org.

August 2011

Cataract awareness month
 Pedestrian safety month
 Psoriasis awareness month

Aug 1 - 5: Psychic week
 Aug 7 - 13: Farmer's market week
 Aug 14 - 20: Resurrect romance week
 Aug 22 - 26: Be safe at home week

Aug 2: National night out
 Aug 6: National mustard day
 Aug 7: Assistance dog day
 Aug 8: Happiness happens day
 Aug 13: International lefthander's day
 Aug 15: National relaxation day
 Aug 21: Senior citizen's day
 Aug 29: Sarcoidosis awareness day



CAPI tip of the month

Please do not open two CAPI applications at once, even in different windows. It will cause duplication of the tracking numbers!



June 2011 SNAP honor roll

100% Accuracy!

0913	LaPine SPD	100%	2711	Dallas ADS	100%
0914	Redmond SPD	100%	3013	Hermiston SPD	100%
1517	Medford DSO	100%	3111	LaGrande SPD	100%
1611	Prineville SPD	100%	3112	Enterprise SPD	100%
1717	Grants Pass DSO	100%	3411	Hillsboro SPD	100%
1811	Klamath Falls DSO	100%	3417	Beaverton SPD	100%
1911	Woodburn ADS	100%	3515	Portland ADS	100%
2518	Portland West ADS	100%			

90% or Better Accuracy!

1513	Medford SSO	96.00	2111	Toledo ADS	93.33
0310	Canby SPD	93.33	2911	Tillamook ADS	93.33
0311	Oregon City SPD	93.33	3211	Florence AAA	93.33
0314	Estacada SPD	93.33	3311	The Dalles SPD	93.33
0411	Warrenton ADS	93.33	3415	Tigard SPD	93.33
0511	St. Helens SPD	93.33	3617	McMinnville ADS	93.33
0811	Gold Beach SPD	93.33	2211	Albany ADS	92.00
2011	Eugene LCOG	93.33	2412	South Salem ADS	92.00
2019	Cottage Grove AAA	93.33			

Ongoing OHP standard issues

There are several issues which remain a problem with the OHP Standard Reservation List which can cause applicants to miss out on benefits; some will also cause audit and review errors! The top issues are:

1. **Waiting for an application.** DO NOT wait for an application. The applicant only has to establish a DOR – the rest is up to you. If they have other open benefits, use the application on file and pend for only what you need; if they are brand new, send a pending notice for a completed application (along with an application) and missing verification.
2. **Oral/Verbal “pending”.** DHS and SPD do not have any rule allowing DHS to orally/verbally request a client provide information. DHS will never prevail in any type of action when we have not provided the client written documentation of what is required. If something is needed to make an eligibility decision, you must send a written pending notice with adequate lead time for the client to respond. Remember: A written notice must always be sent when you need information to process a client’s request.
3. **Interviews.** OHP and CMS policy do not allow an interview for OHP Standard. Forcing a client to complete an interview, violates the program rules and could result in a client complaint or a complaint to CMS. Eligibility decisions must be made based on the application and the documentation. If you have a simple question and want to clarify with the client, it’s perfectly okay to call. If you are not able to reach the client and get the needed information you may send a request by mail for the needed document.
4. **Excess pending.** Applicants are never required to provide a Social Security card, – all you need is the number. Most adults can have their identification documented from WVIR- all you need is their name to check. Check BBCN first for citizenship (remember to update the mainframe screen!) For women who use a married name, try looking up their marriage record on BMBH (Browse Marriage By Husband) using their husband’s name to get their maiden name, *then* go to BBCN. Checking the screens will save you a lot of time!
5. **Update the database.** A large percentage of the Reservation List cases processed by SPD and AAA are not updated on the Reservation List database. It only takes a few seconds and will save many hours of rework for you as well as other staff who are being requested to work these documents. If you don’t know how to find or use the database, ask your manager or lead!



*The address to send reservation related email to 5503 has changed; please use **Drawing,OHP in the state email, or OHPDRAW@DHS.STATE.OR.US**.*



Don't forget! Update the *Rpt Exp* field when you process an Interim Change Report (852). If you don't, the case will suspend and possibly close causing the client to lose benefits and call you. Save time up front and double check!



August 2011 training calendar

Monday	Tuesday	Wednesday	Thursday	Friday
1	2 Basic Lean tools (9:30 - 12:00)	3	4	5
8	9 CBC: 512 (8:30 - 4:30) CEP specialist training (8:30 - 4:30) Basic Lean tools (9:30 - 12:00)	10 CBC: 512 (8:30 - 4:30)	11 	12
15	16 Basic Lean tools (9:30 - 12:00) CREW - Pendleton (8:30 - 3:00)	17	18 CREW - Bend (8:30 - 3:00)	19
22 Eligibility 201 (1:00 - 4:30) Cultural competency and diversity (8:30 - 4:00)	23 Eligibility 201 (8:30 - 4:30) Cultural competency and diversity (8:30 - 4:00) Basic Lean tools (9:30 - 12:00)	24 Eligibility 201 (8:30 - 4:30) Cultural competency and diversity (8:30 - 4:00) MMIS data inquiry and update (8:30 - 12:00) MMIS data inquiry and update (1:30 - 5:00)	25 Eligibility 201 (8:30 - 4:30)	26 Eligibility 201 (8:30 - 12:00)
29	30 Basic Lean tools (9:30 - 12:00) CREW -Klamath Falls (8:30 - 3:00)	31	<p><i>Dates and availability of classes are subject to change. Please review availability on the DHS Learning Center.</i></p>	

In-home exceptions – common issues

Exception requests for in-home services are sometimes delayed instead of approved because of some common issues. Here are some tips on what to look for, from TTT:

▪ Check the service plan

- Make sure there is a pending service plan;
- Complete the CAPS Hours Segment, Needs Association and Tasks List;
- Compare the service plan hours and the hours requested on the 514 as they should be the same;
- Don't include natural support hours in the CAPS Hours Segment with the exception hours.



▪ Justify the request

- CAPS/514 comments should describe the reason why the client needs an exception and why the number of hours exceed the number of hours allowed by rule;
- If the exception is a renewal and is requesting more hours, explain the reason for the increased need;
- Explain why natural supports are ruled out;
- IADL hours are requested without considering OAR 411-030-0070(9)(d) in maximum hours of service.

▪ Fill out the 514 completely and accurately

- In-home exceptions are based on hours; *Assessed* hours on the 514 should be the same as the *Alwd* hours on the CAPS Hours Segment of the service plan; *Requested* hours are the same as *Excp* on the CAPS Hours Segment of the service plan;
- Use only the most recent version of the 514 and fill in each area appropriately;
- Remember that all 514s are to be reviewed, approved, and submitted by a manager!

Contact the exceptions team if you have questions via GroupWise or Outlook: [Exceptions, SPD](#) or email SPDExcept@dhs.state.or.us.

In-Home exceptions team



CAPI tip of the month, BONUS!

The OIS Service Desk does not handle CAPI-related issues. Having a problem? Contact the team by email or phone: [Samantha Brookshire](#) at 503.947.5278 or [Jennifer de Jong](#) at 503.945.5856.



Don't forget! Just because an OHP standard selectee received an application, there is no reason to assume they will save it or use it. If the application doesn't come with the DOR and you need it, send another and pend for it to be returned!

SNAP cash-out project for SSI or seniors

When all members of a SNAP filing group are at least 65 years old or are SSI recipients and reside in Clackamas, Columbia, Multnomah or Washington counties, they receive their SNAP benefits through the “cash-out” program. This is called the SNAP Cash-Out project.

Oregon has participated in this project for more than 30 years. At various times the SNAP policy unit has contacted the Food and Nutrition Service (FNS) to request extension of this project statewide. FNS has been very clear this project will not be expanded to additional counties.

These “cash-out” benefits can be issued in one of three ways: either as cash on the EBT card, by direct deposit to the client’s private bank or credit union account, or by check. These SNAP “cash-out” benefits are cash benefits and, as such, may be used to purchase food and non food items and for cash withdrawals.

Policy has had some recent complaints related to the “cash-out” project. Most involve the loss of cash when clients move or their filing group changes. So, for example, when a client moves from a “cash- out “ county such as Multnomah to a non “cash-out” county like Marion, they lose their cash benefit and now find their EBT benefit limited to a food purchase. This same thing occurs when a disabled or elderly (at least age 65) client who has been receiving cash-out marries and their spouse is not elderly or disabled. It also may occur when children move in with their disabled parents.



Whatever the reason for the change, when a client’s status changes from SNAP Cash-Out client to regular SNAP, policy requires the case manager to explain to the client how this change will affect their benefits. No 10-day notice is needed, because this is not a reduction in benefits. However, explaining the change will help your client use their benefits and avoid later calls to your office.

For information on cash-out, refer to [SNAP G 2](#).

SNAP Policy Analysts



UC tips...

- If, in the budget month of a new application or recertification, the client’s ECLM screen displays a Waiting Week but no payments have been or are being made, do NOT anticipate UC (Unemployment Compensation) income for the budget month.
- If UC has been ongoing, count the UC until the client reports it has ended.
- When there is a break in the UC payments, do not anticipate continued receipt of UC.
- The above aligns UC policy for OHP and SNAP.

Modernization update

I'm sure by this point you have all become used to reading the wit and wisdom of Heather Williams in your *In the Loop* Modernization update. For my very first go at writing the update, I'm charged with breaking the news that Heather's rotation as Business Transition Trainer/Coordinator for SPD has ended and she has returned to her former life as an SPD hearings representative based out of Redmond. We miss you, Heather!

Now for the good news; I've been given the honor of introducing the newest member of the Business Transition Team - me! I have had the chance to go out into the field and meet a few of you, but for those whom I haven't had the pleasure of meeting face-to-face, a quick introduction. My name is Samantha Brookshire (formerly Bouton), and I'm the SPD Business Transition Coordinator here at DHS Modernization. I came to the team from Washington County, where I was an HSS3 at the SSP Processing Center. Yup, I'm new to SPD, so please don't hesitate to educate me on the in's and out's of your jobs and your needs as far as technology goes.



In June's update, you learned DHS/OHA had entered negotiations with Oracle to provide the Eligibility Automation/Health Insurance Exchange software solution, and saw a quick overview of the project.

I'm happy to announce that as of July 1st, the contracts have been signed and services have officially been purchased! As the project moves forward over the next few years, I anticipate you will be hearing quite a bit about all the exciting features of the software from a variety of sources. Before we get into what the Oracle software can do for us, I'd like you to tell me what you want it to do and I'll address those ideas over the next few months using this space.

Homework assignment: Email Samantha Brookshire (Samantha.S.Brookshire@state.or.us) with your dream for what the Oracle software can do. Tell me what you want our computer systems to look like in 3 years. What neat features have you seen in other software or on websites that you would like to see DHS use? What can the new software do to make your job easier?



Don't forget! If a client self-identifies as HNA, be sure to ask them about potential tribal income.

Income could include timber sales, gaming revenue, per capita payments or income as a child care provider for the tribe. For information on what to count see [Counting Client Assets 39](#). Don't forget to narrate!



Want to see your area featured in *In the Loop*? Its easy! Gather your photos and story then contact Karen Gulliver with SPD Field Services karen.l.gulliver@state.or.us and your area can be famous too!