APD Field Services July 2014

# In the Loop

## Diversity Conference: September 16 & 17

The annual state diversity conference will once again be held at the Salem Convention Center on September 16th and 17th. ***Ask your manager if you can attend before registering.***

This year's theme is *The Part We All Play: Celebrate! Educate! Advocate!*

This event offers a full day of free professional development aimed at building cultural competency in our increasingly diverse world.

Please save either September 16 or 17 to be in Salem for this year's event; the agenda is repeated both days, so choose just one day.

There will be many popular speakers returning, as well as a variety of relevant topics covering both broad and specific interests. Information will be posted on the website as it is finalized: http://www.oregon.gov/ODOT/COMM/Pages/2014DiversityConference.aspx.

Thank you for your interest in learning and growing so we can better serve all Oregonians!

*DHS Office of Equity and Multicultural Affairs*

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

## SDS 347

The SDS 0347, *AFH Classification – Variance Request*, has been updated. The updated form is on the DHS forms server and the Licensing Tools intranet page, under *Tools & Resources*.

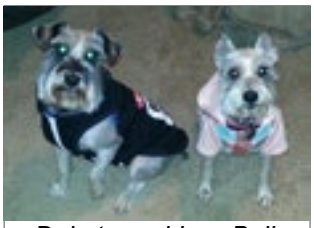
The changes on the form reflect the change in terminology from "exception" to "variance" and include the new rule references. Remember: delete all old, out-of-date versions!

## ADRC toolkit for LTC services and supports

The Aging and Disability Resource Connection (ADRC) toolkit, *Planning For Your Future: A Toolkit for Long-Term Care (LTC) Services and Supports*, is a great resource for anyone ready to start planning for their future long-term care supports. The toolkit is full of great information and breaks down some of the care and support options available.

Some of the areas covered are:

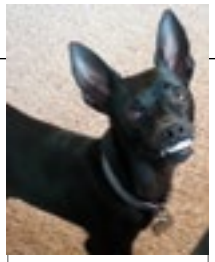
- Types of long-term services and supports;
  - Community-based services;
  - Home-based services;
  - Facility based services.
- Thinking about options for long-term services and supports;
  - What's important;
  - How will you pay for services;
  - How will you maintain control of your finances;
  - Who will take care of you.
- How much will services cost;
  - This section includes a breakdown of prices for different services and an interactive worksheet to help estimate monthly payments.
- Private pay options;
  - How to fund services privately.
- Public pay options;
  - Overviews of Medicaid, Medicare, and Social Security, and how and when they can help you fund your services.
- Creating your plan
  - This section helps bring it all together and make a plan for yourself and your family so when the time comes for you to need services, everything will be taken care of!



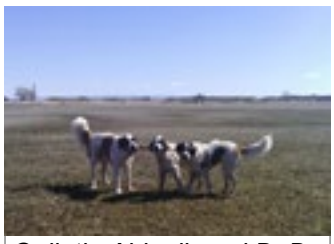
*Dakota and Izzy Bella - LeAnne Jespersen, Oregon City*

This is just one of the great new features available on the ADRC's site www.ADRCofOregon.org. We welcome you to explore all the great new features our website has to offer. If you would like additional information, you can reach the ADRC or Oregon toll-free at 1-855-673-2372, or email ADRC.WebMessages@state.or.us. And don't forget to like us on Facebook!

## August 2014 training calendar

| Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|
| *Dates and availability of classes are subject to change. Please review availability on the DHS Learning Center.* | | | | **1** |
| **4**<br>Cultural competency and diversity, Woodburn (8:30 - 4:00) | **5**<br>CAPS basics (8:30 - 4:30) | **6**<br>CAPS basics (8:30 - 4:30)<br>Cultural competency and diversity, Portland (8:30 - 4:00)<br>Ask diversity, Florence (9:00 - 4:00) | **7**<br>Cultural competency and diversity (8:30 - 4:00)<br>Ask diversity, Salem (9:00 - 4:00) *and* Eugene (9:00 - 4:00) | **8**<br>Cultural competency and diversity, Portland (8:30 - 4:00)<br>DV 101 (8:30 - 4:30) |
| **11**<br>  <br>*Ruger - Aaron Malvaney, Redmond* | **12**<br>Case management essentials (8:30 - 4:30) | **13**<br>Case management essentials (8:30 - 4:30) | **14**<br>Case management essentials (8:30 - 4:30) | **15**<br>Case management essentials (8:30 - 4:30) |
| **18**<br>Eligibility 201 (1:00 - 4:30) | **19**<br>Eligibility 201 (8:30 - 4:30)<br>Oregon ACCESS basics, Portland (8:30- 4:30) | **20**<br>Eligibility 201 (8:30 - 4:30)<br>Oregon ACCESS basics, Portland (8:30- 4:30) | **21**<br>Eligibility 201 (8:30 - 4:30)<br>Accuracy summit, Springfield (8:00 - 5:00) | **22**<br>Eligibility 201 (8:30 - 12:00) |
| **25** | **26**<br>SPL rule training (8:30 - 4:30)<br>Basic Lean concepts, Portland (8:30 - 12:00) | **27**<br>SPL rule training (8:30 - 4:30)<br>CBC: 512, Albany (8:30 - 4:30)<br>Ask diversity, Eugene (9:00 - 4:00) | **28**<br>SPL rule training (8:30 - 4:30)<br>CBC: 512, Albany (8:30 - 4:30)<br>Field Leadership meeting (8:00 - 5:00) | **29**<br>Ask diversity, Eugene (9:00 - 4:00) |

## SRS and you!



*Goliath, Abigail, and DeDe - Deb Quant, Burns*

Daily, the SNAP Policy Unit fields many questions about SRS and how to deal with cases in SRS. One of the most common questions is: *"Is it true? If I certify a household with income over the countable income limit, the only other reporting requirement they have is to let me know if their mailing address changes. Don't they have to report if their income goes over 185% FPL?"*

**Effective April 1, 2010, customers in SRS were no longer required to report a change in their mailing address.** The only reporting requirement is when the countable income for the filing group exceeds the SNAP countable income limit.

There is not a requirement in SRS, for anyone to report when they go above 185% FPL. The requirement to report income going above the 185% of FPL ***used to be*** a reporting requirement limited to NED households, but that reporting requirement was removed by FNS and the rule was changed in October of 2009.

So YES, IT'S TRUE! If they are over the 130% FPL, they don't need to report anything!

*SNAP Policy Analysts*

**Don't forget!** Please review the Manual letter # 64 on the APD Staff Tools website for updates to rules and procedures impacting your work. See SS-PT-14-015 and SS-PT-14-016 for a complete list of the updated OAR's.

## FSAM update

Section III.F, *Receipting Money*, of the Field Support Assistance Manual (FSAM) has been updated.

Please let Caryn Whatley and Karen Gulliver know if there are any problems; we'll do our best to get it fixed right away!

## Medical ID info for customers

Here is an idea for what to tell customers when they receive Medicaid to help them find and keep their medical ID card. Many thanks to Cindi Bowman in Baker City for the idea!

Tell your customer:

- You will be receiving a yellow envelope from the State which will contain information about the Medicaid benefits you qualify for.
- You will also find a white piece of paper in the envelope with a bunch of Xs on it; please don't throw that away!
- If you look at the top left hand corner of the paper with the Xs, you will find your Medicaid card. Please cut the card out and keep it somewhere safe.
- You will need to show the card to your medical providers to verify your coverage.

If you have a technique working for you, or a tip you think could help others, send it to Karen Gulliver or Angela Munkers. We love to share your knowledge!

## Reduce, reuse, recycle—the LTC way

***"A society is defined not only by what it creates, but by what it refuses to destroy."***
***-John Sawhill***

Oregonians are notorious for recycling. We love to shop at thrift stores, have different colored recycling receptacles, compost our coffee grinds and table scraps and have sculptures in our yards recycled from industrial metal equipment. As we scrape what remains of our dinners into compost buckets, many clients struggle at home without much food in the fridge and perhaps are unable to get to the store because their scooter was denied for "community use". Or they may suffer without a hospital bed that fits them properly because they missed the criteria for a bariatric bed. Unfortunately, the tremendous effort put forth by case managers and those working with clients are often tangled in the red tape of the bureaucracy that exists to help clients, but ironically sometimes prevents meeting the need.

Fortunately, there are those who have expanded the view of not just recycling old phone books, but are now repurposing wheel chairs, scooters, and lift chairs; I recently had an opportunity to visit such an organization. Lifestyle Hospice Foundation in Eastern Oregon was created to help clients with durable medical equipment needs whose financial situation doesn't enable to do it on their own. As I entered the organization I saw that it was brimming with wheel chairs, walkers, and shower chairs. One of the staff members came out to greet me saying "We don't just have customers here, they are our friends." This came as a refreshing statement since earlier that day I had been on hold with a large DME business for a half hour and suffered through a voice mail tree to no avail.

*Kleen - Janice Castle, Central Office*

After meeting the staff and being inspired by the mission and how it may be a resource for clients, I invited the Executive Director Kent Fife to attend a meeting with Eastern Oregon Coordinated Care Organization (EOCCO) representatives and some of our APD supervisors. At the meeting, a nurse from the CCO asked if Lifestyles would be able to provide a scooter for community access and was told "yes." It was like watching a butterfly wriggle itself free from the spider web of red tape with amazement at the simplicity of the answer and the ability to go beyond "medical need".

Following this meeting I did a quick Google search for other similar resources and found another nonprofit agency, Clearview Medical Loan Closet. I called and immediately was in contact with the Executive Director Darrin Umbarger who said he charges nothing for loaning out the equipment such as Hoyer lifts, scooters, wheelchairs, shower chairs, and other items. *Could a partnership of the strengths of our large bureaucracy with its built in delivery system and direct access to clients be combined with the agility of a small but mighty nonprofit to efficiently enhance the quality of life for our clients?*

The jury remains out on how such a partnership may work yet some organizations such as Clearview Medical Loan are supported by new legislation as House Bill 4108. HB 4108 was recently passed and requires the Oregon Health Authority to contract with nonprofit

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*Murphy - Kris Boler, The Dalles*

organizations for pilot projects providing used durable medical equipment to Medicaid recipients. These organizations are out there working with those in need and have the potential for a mutually beneficial relationship with DHS. If you have ever had clients denied equipment they needed or have seen unused equipment that could be put to use by someone else but are gathering dust in a hallway, the potential may be there for a great partnership. Through the DME repurposing initiative equipment donations can be funneled to organizations that in turn will have items on hand for clients that aren't able to be served by traditional means.

**DISCLAIMER**: *Please note that before accessing equipment through non profits such as the ones mentioned in this article, workers should first fully explore if Medicaid can pay. In some cases, donation/loans could prevent Medicaid from covering the DME and potentially negatively impact clients.*

**For information on House Bill 4108:**
https://olis.leg.state.or.us/liz/2014R1/Downloads/MeasureDocument/HB4108

**For inquiries on the providers serving Eastern Oregon:**
Lifestyle Hospice Foundation: (541)216-6468 www.lifestylehospicefoundation.com
Clearview Medical Loan Closet: (541) 276-1130 www.clearviewmdrc.org

*Bridget Roemmich, LTSS Innovator Agent (Districts 12, 13, 14)*

## The Accuracy Summits are back!

The 2014 Accuracy Summits are now available for registration on the Learning Center. This year's summit theme of *Accuracy Creates Excellence* will focus on access, payment accuracy, and customer service. The Accuracy Summits are primarily intended for experienced eligibility workers who determine SNAP eligibility.

SNAP related workshops include: SNAP Deductions, Earned/Unearned Income Calculations, Effective Interviewing and Narration, and Accuracy=Customer Service.

To ensure space availability at each of the summits, we are asking staff to register **at least 3 weeks** prior to their preferred summit date. Dates are filling up quickly - do not delay in registering or you may miss out on this great training opportunity!

- *Springfield:* 8/21 **(Register by 8/1)**
- *Salem:* 9/23 or 9/24 **(Register by 9/2)**
- *Clackamas*: 9/9 **(Register by 8/19)**
- *Clackamas*: 10/7 or 10/8 **(Register by 9/17)**
- *Grants Pass*: 10/22 **(Register by 10/1)**
- *La Grande:*10/14 **(Register by 9/23)**

*SSP Training Unit*

## Assistance animals provide a variety of services

Of all the protected classes for housing equity, disability is the most common area of complaints and confusion. Of all disability-related situations, one of the most frequent involves assistance animals.

*Boris - Karen Gulliver, Central Office*

Under the Fair Housing Act, housing providers:

- Will expect verification stating the resident or applicant has a disability and *needs* the animal because of their condition, However, they may NOT request or require an assistance animal be trained or certified to perform specific tasks;
- May NOT restrict animals by breed or species;
- May NOT charge fees, deposits, or rent related to an assistance animal regardless if pets are allowed on the property or there are such charges for pets;
- Will expect property is not damaged by the animal nor others are not unreasonably inconvenienced by it;
- Will expect the resident to be responsible for the animal and its behavior;
- May have rules for assistance animals if they are no more restrictive than rules for pets.

If someone you know requires the aid of an assistance animal, they have the right to have the animal reside with them, even in properties with a "no-pets" policy. For more information about assistance animals in housing visit: www.FHCO.org/assistanceanimals.htm.

The Fair Housing Council is a nonprofit serving Oregon and South West Washington. Anyone may call the free Fair Housing hotline at 800-424-3247, ext. 2; or visit www.fhco.org.

*Jo Becker, Education and Outreach Coordinator*

## Clarification on using an 415F instead of an 852

When a customer submits a 415F instead of an 852 at interim report what is a worker to do? Can we accept the 415F? Do we need the customer to complete a new 852? What about the signature page of the 852?

If a customer submits a 415F in lieu of an 852 the worker ***can*** accept the 415F and use the information reported to process the interim change report. However, the worker needs the customer to sign and date the back page of the 852, regardless of if benefits are increasing, decreasing, or staying the same. By signing, the customer waives their right to 10-day notice if necessary, indicates they agree with what they sign, states they are providing accurate information, and they understand their hearing rights.

Without a signature on the 852, we cannot use a 415F to process the interim change report. If a customer submits an 852 with no signature, it cannot be processed, regardless of if benefits are going up, down, or staying the same until the back page is signed and dated.

*Stephanie Cooke, Quality Assurance Reviewer*

**Don't forget!** There is easy to use NED help on the SNAP Desk Tools website. The Power Point explains all about what NED is and how to code it. You can also try the NED skill challenge and prove you know your stuff!

## TTT highlights – Refugee program

*The June 19, 2014 Train the Trainer (TTT) meeting discussed the refugee program. For information on attending TTT in person or via v-con, or about presenting at the TTT meeting, please contact Lauren Mitchell.*

Although the number of refugees in APD and AAA is not high, if you have one on your case load it can be very confusing!

### What is a refugee?

"Refugee" is an official status awarded by the United States Citizenship and Immigration Services (USCIS) to persons forced from their home who have crossed an international border for safety.

- The refugee must have a well-founded fear of persecution in their originating country due to factors such as race, religion, or political opinion;
- No one can self-declare they are a refugee!

*Hunter - Alice McDonald, Eugene*

### Who are refugees, typically?

The term "refugee" will be applied to persons in one of these groups:

- Refuges - as granted by USCIS;
- Asylees - another federally granted status;
- Cuban or Haitian entrants;
- Cuban parolees – persons granted the right to enter the USA, NOT felons;
- Victims of international trafficking – modern slavery;
- Iraqi and Afghan Special Immigrant Visa holders (SIV) – persons who were employed in their home country by the USA during a certain period; or
- Amerasians – children of a US military service member and an Asian mother.

### What are refuges benefits?

Refugees may qualify for SNAP, Medicaid, Social Security, TANF, and a special program called Refugee Cash. There are eligibility rules for all of these programs, just like for non-refugees.

### Where to get help

If you have a refugee on your case, contact Tony Scott who is the expert on all things refugee related: 503-945-5261, or anthony.scott@ state.or.us.

See the refugee website for more information.

## June 2014 SNAP - great job!

*Not every office had a targeted review in June - some did and others had a review of fewer than 5 cases. Although this list is UNOFFICIAL, not a true honor roll, and not totally representative, we still want to acknowledge those office who did a great job!*

### 100% accuracy!

| | | | | | |
|---|---|---|---|---|---|
| 0111 | Baker City APD | 100% | 1811 | Klamath Falls APD | 100% |
| 0914 | Redmond APD | 100% | 2311 | Ontario APD | 100% |
| 1611 | Prineville APD | 100% | 3013 | Hermiston APD | 100% |
| 1612 | Madras APD | 100% | 3112 | Enterprise APD | 100% |

### 90% or better accuracy!

| | | | | | |
|---|---|---|---|---|---|
| 2011 | Eugene AAA | 97.78 | 3415 | Tigard APD | 93.33 |
| 2711 | Dallas AAA | 96.15 | 2411 | Salem AAA | 93.33 |
| 2111 | Toledo AAA | 96.00 | 3515 | Portland AAA | 93.02 |
| 2211 | Albany AAA | 96.00 | 0411 | Warrenton AAA | 92.86 |
| 3417 | Beaverton APD | 95.83 | 3111 | La Grande APD | 92.86 |
| 0314 | Estacada APD | 93.33 | 0611 | North Bend APD | 92.00 |
| 0511 | St. Helens APD | 93.33 | 1011 | Roseburg APD | 92.00 |
| 3211 | Florence AAA | 93.33 | 2019 | Cottage Grove AAA | 91.67 |

## August 2014

Psoriasis awareness month
Win with civility month

Aug. 1 - 7: Simplify your life week
Aug. 10 - 16: Resurrect romance week
Aug. 25 - 31: Be kind to humankind week

Aug. 1: US Air Force day
Aug. 4: Assistance dog day
Aug. 7: Purple Heart day
Aug. 13: International Lefthander's day
Aug. 14: V-J day
Aug. 17: Black cat appreciation day
Aug. 21: Senior citizen day
Aug. 26: National dog day
Aug. 31: International bat day

## Estate recovery brochure – updated!

The Estate Administration Unit brochure on estate recovery you've been waiting for is now available! MSC 9093, *Estate Recovery Program*, can be ordered from DHS Publications through your regular forms ordering process.

*Booker - Elizabeth Mullin-Pope, Bend*

Please check thoroughly for any old versions of the MSC 9093 at your desk, in your office, or saved on your computer and recycle them today.

For more information about the updated brochure, see OPAR-IM-14-008.

*Have a question about Voter Registration? Ask your local site coordinator, check the manual, or contact Karen Gulliver: 503-569-7034; karen.l.gulliver@state.or.us.*

## Searching for resources in your own neighborhood

The Aging and Disability Resource Connection (ADRC) of Oregon has a new feature on their website which allows you to search for resources in local your area! With so many resources out there it can be hard to find exactly what need and this tool allows you to search for:

- Adult Day Care and In-Home Care;
- Consumer services and protection;
- End of life counseling;
- Financial management services;
- Medicare/insurance services;
- Transportation; and
- Much more!

*Heather - Michael Palmer, EAU*

The search tool allows you to search by keyword and a zip code or county to find the services you are looking for. Or, search by need and use drop-down menus of services by county.

As always, if you still can't find what you're looking for, the ADRC's knowledgeable staff are available to assist you in your search. They can be reached by phone at 1-855-673-2372**,** by email at ADRC.WebMessages@state.or.us, or on Facebook.

## August 2014 Community Based Care payment schedule

August provider service payments for the APD and DD 512 Programs as well as the CEP program will issue the night of Friday August 1st and mail to providers the next business day, which is the morning of Monday August 4th.

***Due to the weekend of August 2nd – 3rd, there will be a delay in the mailing of checks and direct deposit posting of payments by banks***

Direct deposit (EFT) payments will also issue on Friday August 1st. Rather than being mailed, they will be sent to the Department of Treasury on Monday August 4th, and then out to individual banks for processing. *Banks are allowed to use up to three (3) banking days to process direct deposit payments which does not include weekends or holidays!* Please note: DHS does not have any control of how and when individual banks process their direct deposit payments.

Per the agreement signed by the provider to begin direct deposit of their payments, the provider is required to confirm funds are available before making purchases out of their account. DHS will not reimburse providers for overdraft charges due to insufficient funds.

EFT payments will be available on or before 11:59 p.m. Wednesday August 6th.

Direct deposit information, sign-ups, changes to account information, and other questions should be directed to the E-Commerce Unit at 503-945-6872.

*Kristen Hutton, APD Provider Relations Unit*

## ACA procedures: Reminders and tips

Lauren Mitchell is keeping the Affordable Care Act (ACA) Information and FAQs website up-to-date almost daily. If you haven't looked around lately, be sure to check it out – the new format is easy to use and everything on the page is accurate and the very latest information.

On June 16, APD-IM-14-028 was sent with procedures for working with 5503. Staff is having a few challenges around implementing the procedures in the transmittal, so here are a few tips and reminders. ***ALWAYS*** *look in the New Procedure Document for the latest ACA procedures!*

- DO NOT email applications to the 5503.apd.referral box - that is for Cover Oregon only!
- Do not highlight "due process" on the applications;
  - Applications are scanned and the scanner can't read the text under the highlighting;
  - Applications with the highlighting over "due process" are not getting to the correct queue and are difficult to locate;
- Due process 7210s must be *faxed* to 503-373-7495;
  - 7210s which are not faxed end up in the wrong queue for processing causing delays and problems locating the application later;
- Applications are recorded by the name of the primary applicant only;
  - Please have the person who is losing the APD program benefits listed as the primary applicant so their paperwork can be more easily located;
- When a MAGI recipient becomes Medicare eligible, wait for 5503 to contact you before requesting a case transfer. 5503 must determine dual eligibility for MAGI/MSP before any action is taken on the case. When 5503 makes their determination, they will contact your branch and then you determine MSP eligibility; the buy-in unit picks up premiums for MAGI Medicare recipients. See *New Procedures Document* on the ACA information site.
- When responding to a Medicaid Savings Program (MSP) referral such as QMB, please respond directly to the worker who contacted you;
  - 5503 is having some difficulty tracking information back to a specific worker because of the volume of applications.

*Jonas - Angie Perry, Portland*

Please follow the latest procedures and don't "invent" new ones; keep this process moving! Contact Lauren Mitchell, lauren.e.mitchell@state.or.us, with process questions – and be specific.

## More NVRA Q&A

Here are more questions and answers about the National Voter Registration Act (NVRA) procedures. If you have a question, contact Karen Gulliver by phone, 503-569-7034, email: karen.l.gulliver@state.or.us, or IM.

**Q: Can I make copies of the MSC 503 and give those to customers?**

**A:** No you can't use a copy of the voter registration form – originals only! If you start to get low, make sure your local forms ordering person knows so they can get you more before you run out. *BTW – you can make copies of the MSC 503D (the declination), so save some money and stop ordering those!*

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**Q: I've been mailing the voter registration cards every Wednesday, is that okay?**

**A:** The completed voter registration cards must be mailed *within 5* ***calendar*** *days* of the day they are complete. If you wait to mail them on a Wednesday, everything you received the previous Thursday or Friday is now late! Instead of sending cards in once a week, mail them they day they are completed, if you only get them occasionally. Watch the post marks! If you drop an envelop in the mail on day 5 and it isn't postmarked that day, it's late!

**Q: Can I get the email link to send to people?**

**A:** Yes - https://secure.sos.state.or.us/orestar/vr/register.do?source=DHS. Send this link to anyone who contacts you for an NVRA qualifying reason via email – like reporting a change of address. When you send the link you also have to complete a declination marked "yes" and a narration.

## Compare services to find the one that's right for you!

One of the great new features on the Aging and Disability Resource Connection (ADRC) of Oregon's newly re-designed website is the ability to compare services in your area.

From the ADRC's home page, enter the zip code and type of service you want under the *Search for Resources* heading. For example, if you were looking for food assistance in Salem, Oregon you could enter 97301 and "food" for the keyword. Then select the "Go" button.

A page with a list of food resources in your area will appear. Scroll through the list and select up to three options by selecting the box on the left. When you have made your selections, scroll to the bottom of the page and select the "Compare" button.

A comparison window will open with selected options such as:

- Program type;
- Distance from your location;
- Languages spoken;
- Eligibility requirements;
- Service area; and
- Much more!

*Milo and Bella - Jodi West, LaGrande*

Now when you are searching for services in your area, you can feel confident you are selecting the right service for you!

Don't forget to check out this and all the services offered on the ADRC of Oregon's website. And as always, if you still can't find what you're looking for, the ADRC's knowledgeable staff are available to assist you in your search. They can be reached by phone at **1-855-673-2372,** by email at ADRC.WebMessages@state.or.us, or on Facebook at https://www.facebook.com/ADRCofOregon.

*Kristi Murphy, ADRC Program Analyst*

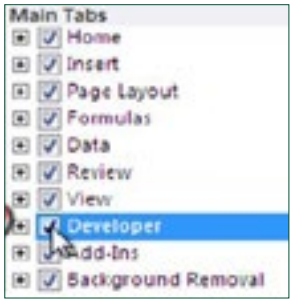
# Excel tip – Macros

Don't panic! Setting up a macro in Excel is super easy and can save you hours of work every month. All a "macro" does is track a set of actions you want to have repeated *every time* you open an Excel spreadsheet. Excel can take all those actions at the touch of a button.

If you have a report you look at or work on every month, but you change the font, the size, add tabs, remove tabs, format the page – anything you do to that spreadsheet *every time* can be put into a macro so it happens nearly automatically. Just record the macro, save it, and click.

To set up a macro in Excel 2007 or 2010, add the *Developer* tab to your Ribbon at the top of the screen:

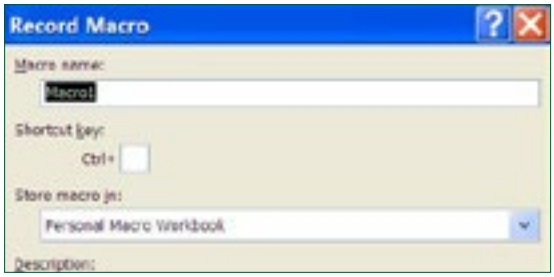
- Right click on the Ribbon;
- Click the *Developer* box under *Main Tabs*



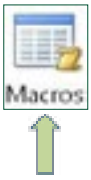

To start recording your macro:

1. Open the Excel worksheet you want to format;
2. Click on *Record Macro* in the Developer box;

3. Name the macro something that makes sense to you (such as "Recertdue");
4. Save in *Personal Macro Workbook*;




5. Take all the action to format, move things around (whatever) you want to have repeated automatically every time;
6. Click *Stop Recording*;




7. Done!

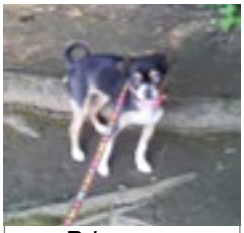
To use your macro in the future, click on *Macro* in the ribbon and choose the appropriate one.

Now sit back and contemplate the work you're not doing.!

*Want more help using Excel? Take computer-based training through the DHS Learning Center. For Excel 2003, take: #C03653; Excel 2010: C03648.*

## Oregon Community Choices Program update

The work of the Oregon Community Choices Program (OCCP), formerly Money Follows the Person, is continuing. OCCP is a two-fold effort to: (1) transition people living in institutional settings to a home, an apartment, or group home of four or fewer residents; and (2) change state policies so Medicaid funding for long-term care services and supports can "follow the person" to home and community based setting of his or her choice. Since our update in January 2014, here are some of the exciting things currently happening:



*Princess - Christina Greening, Eugene*

- OCCP will initially focus on APD populations which include seniors, adults with physical disabilities, and intellectual or development disabilities populations in institutional settings;
- OCCP Program Directors and the OCCP Internal Steering Committee continue to meet monthly and share challenges and concerns in preparation for implementation of OCCP. Coding requirements are the major challenge and prevent the program from being fully functional;
- Meetings continue with OCCP stakeholders to discuss program development, challenges, and concerns related to transitioning individuals from institutional living options to appropriate local community housing options. OCCP staff committed to the stakeholders a "go live" date of July 1, 2014;
- During the month of June, five (5) webinar training sessions were held with APD/AAA field staff that will be part of the program including transition coordinators, case managers, and supervisory and management staff; trainings were attended by 144 participants. OCCP program staff appreciated the time and effort shown in attending these sessions. Copies of the Power Point materials, training documents, and the recorded June 26 training session will be available soon.

If you have questions about OCCP, please contact:

- Sarah Hout: Sarah.D.Hout@state.or.us, 503.947.5104 (desk), 503-269-7423 (mobile);
- Jeff Puterbaugha; Jeffrey.L.Puterbaugh@state.or.us, 503.947.1189 (desk), 971-600-7877 (mobile);
- OCCP.Elg@state.or.us and 1.855.ELG-OCCP, 855-354-6227.

## MSC 504 cards

The MSC 504, *Agency Voter Registration Reporting Form*, is updated and the new version is available on the DHS Forms Server. If your office sends this by email, please discontinue the old version and use only the updated version; if you are still mailing a hard copy (why?) use up the old stock.

When reporting the number of cards on the MSC 504, report *only* the cards your office has mailed to County Elections – not the number of cards you handed out!

**Eligibility workers and case managers**: DO NOT drop completed voter registration cards in the mail! Give them to your local site coordinator so they can be counted.

# D6 archiving pilot

Imagine looking for something, but having to sort through boxes, climb over cots or other obstacles, and search through multiple shelves in order to get what you need. This was an all too familiar scene in filing room for the DSO and SSO in District 6. The Roseburg staff encountered crumbling shelves, blocked hallways, and sick rooms filled with archive boxes. They decided something needed to change.

In October, District Manager Merry Bayly contacted the Office of Continuous Improvement (OCI) to conduct a Rapid Process Improvement (RPI) event. The purpose of this event was to look at the current filing practice at both offices in District 6 and come up with a way to address the current storage crisis and a process going forward to keep space for filing at a minimum and better control what is kept on site and what is shipped to archives.

In November, OCI conducted the two-day RPI with a group of employees from both offices representing all roles to streamline this process. The team identified root causes to issues plaguing their current process and brainstormed ways to improve it for the future. Here are some of the improvements:

- Reduced the number of process steps from 45 to 23;
- Files maintained in chronological order vs. filed by type of document in sections; time saved by not having to file documents by section;
- No mini and master file. Only a master file is to be kept at the worker's desk with 2-3 years of documentation in the file;
- Files are purged on-site after seven years instead of going to archiving;
- Staging areas eliminated. Files do not wait in an area for processing by support staff;
- Less expensive manila file folders to be used instead of the more expensive six section (classification) file folders;
- Lead Worker no longer reviews the file before the case is transferred;
- No offsite storage. No expense of paying for files to be stored outside of the office. Also eliminated the need for an onsite file room.

*Susie and Jesse - Kathie Young, Medford*

Staff in both offices began implementing the new process by the end of 2013, and as of April 2014, they have seen tremendous results! Employees are pleased with the new process, space required for files have decreased, hallways and sick rooms are clear, and workers have additional room at their desks. Some of the benefits staff has noted are:

- No more stacks for filing the baskets in the file room;
- No more stacks of file folders to sort, label, and create additional volumes for storing all of the paper;
- An OS2 can quickly sort files and place them on the marked shelf until it is time to place in boxes for archiving;

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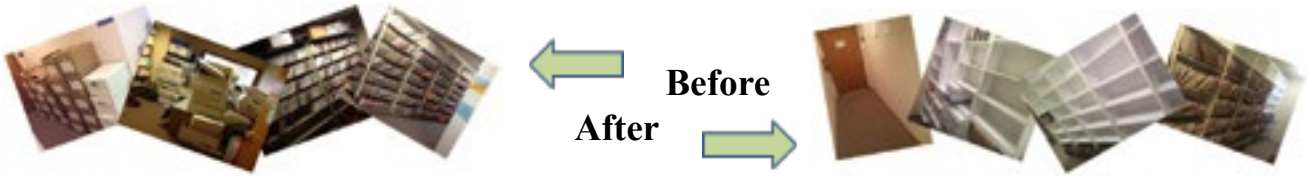
- A clean, organized, tidy file room;
- The sick room is now clean and tidy (it had been the area for overflow files);
- Worker desk files are organized and contain just two years of information leaving plenty of space in the file drawer and easy access to each case file;

As the filing areas were cleaned up, the OS team was motivated to clean out cupboards and shelves of stored items. Brochures have been moved to one area and are easily accessible to the workers. All office supplies have been moved to a more central area, providing easy access for the entire staff. Every cupboard and drawer is now labeled and organized.



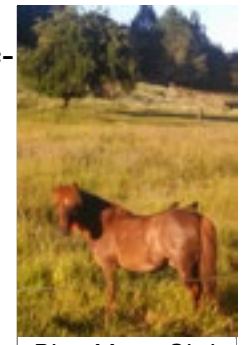

*Kristen Newton and Bernadette Fisher, Office of Continuous Improvement*

## Consumers and nurse needed for two advocacy boards

The Advocacy and Development Unit is actively recruiting to fill positions on two of the boards they are responsible for – the Medicaid Long Term Care Quality and Reimbursement Advisory Council (MLTCQRAC) and the Oregon Disabilities Commission (ODC).

The Medicaid Long Term Care Quality & Reimbursement Advisory Council (MLTCQRAC) is seeking to fill 3 vacancies. Two vacancies must be filled by "consumers of long term care facilities or community based care facilities or family members of such residents." The third vacancy must be filled by a director of nurses of an Oregon long-term care facility who has practiced in Oregon in long-term care for three years preceding appointment. The Council was established by the 1995 Legislative Assembly and consists of 12 stakeholders including the Long Term Care Ombudsman, consumers, advocates, and providers. Council appointments are made by the Governor, the President of the Senate, the Speaker of the House, GCSS, and, ODC. Council members may serve up to two, three-year terms.

The Oregon Disabilities Commission (ODC) is seeking to fill 6 positions. The ODC is a cross-disability commission comprised of people who are experienced in or have demonstrated particular interest in the needs of Oregonians with disabilities. A majority of the members are people with disabilities. Commissioners may serve up to two, three-year terms. Applicants from rural areas of Oregon and/or with experience in mental health issues and/or youth with disabilities will be given preference.



*Blue Max - Chris Ellis, Central Office*

If you are interested in learning more about these vacancies, please contact Jeannette Hulse at 503-947-1136 or jeannette.l.hulse@state.or.us. To learn more about Governor appointed boards and commissions or to apply for one of these vacancies please visit www.oregon.gov/gov/Pages/boards.aspx to view the handbook and access the application form.

*APD Advocacy and Development*

# TTT highlights – MMIS

*The June 19, 2014 Train the Trainer (TTT) meeting discussed locating a medical case on the mainframe and MMIS. For information on attending TTT in person or via v-con, or about presenting at the TTT meeting, please contact Lauren Mitchell.*

Here are some reminders and hints for locating a medical case using MMIS. For more MMIS related tips from TTT, please see the link in the *Latest News* section of the APD staff tools website.

## Why use MMIS?

If you are a seasoned worker, we know it's hard to break the habit of just checking WEBM,FIND to locate benefit information. However you may not be able to see the medical case if you don't look on MMIS and the person you are trying to help could wind up with duplicate cases and the wrong benefit.

All medical cases opened by Cover Oregon or the Fast Track applications are invisible on the mainframe WEBM,FIND search. *This means if you don't look on MMIS, you will miss it 100% of the time*.

Make MMIS your first stop!

## What does it look like on MMIS?

Open the benefit panel in MMIS for your person and look for an end date of 12/31/2299. This magic date means the benefit is open! *Don't forget you can set up preferences in MMIS to have the benefit panel open automatically!*

## Fast Track medical

If the recipient is eligible based on a Fast Tack application, their benefit will show a future end date that is *not* 12/31/2299 and have a FAST designation on their case number in the benefit plan panel.

## Cover Oregon Medical

If the recipient is eligible based on a Fast Tack application, their benefit will show a future end date that is *not* 12/31/2299 and have a HIX designation on their case number in the benefit plan panel.

The Client Maintenance Unit (CMU) is always willing to help is you have questions about eligibility in MMIS: 503-378-4369 or client.maintenance@state.or.us.

*Send in your branch photos and news stories to karen.l.gulliver@state.or.us to share in the newsletter and inspire others with your remarkable deeds!! (And send your pet pictures!)*

## Waivered case management and direct contacts

Under the K-State Plan, a Case Manager is recognized as a service provider. The Case Manager provides case management services, and to comply with the waiver, these case management services must be provided to consumers via direct and indirect contacts. Naturally, it is a significant concern when a service provider fails to provide a contracted service to a consumer or claims to provide a service to a consumer but does not.

Case Managers with K-State Plan service consumers must complete direct contacts with their consumers at least quarterly per Oregon's 1915(c) waiver. These direct contacts must be via telephone, e-mail, or in person, and must take place with the consumer or the consumer's representative.

Case Managers also carry out monthly indirect contacts. Indirect contacts can happen with a consumer's family member, representative, homecare worker, medical professional, or with another APD/AAA employee such as an APS investigator.

These direct and indirect contacts must ensure needed services are being provided to the consumer in accordance with the consumer's person-centered service plan and updates and changes are made as needed. With many consumers, these contacts will take place through the usual course of day-to-day case management, and documenting them will blend seamlessly into your normal workflow.

*Baby and Bugsy - Brian Scafazzo, Gresham*

Direct contacts may take place more often than quarterly, and a direct contact can take the place of an indirect contact but an indirect contact cannot take the place of a direct contact.

As with most other aspects of case management, documentation plays a pivotal role in successfully completing an indirect consumer contact. These contacts must include documentation of:

- The nature, content, units of the case management services received, and if the goals specified in the person-centered service plan have been achieved;
- Whether the consumer has declined any services in the plan;
- The need for, and occurrences of, coordination with other Case Managers; and
- Timeline for obtaining needed services or for reevaluation of the plan.

For those difficult-to-reach consumers who don't have a reliable collateral contact, it may be necessary to attempt an unannounced home visit to meet the monthly indirect contact requirement. Such unannounced visits do not require 14-day advance notice because they are not annual re-assessment.

For helpful information, please review the waivered case management materials on the Case Management website.

*Chris Ellis, Medicaid Long Term Care*

## MMA team

Many times Medicare/Medicaid (dual) clientele have difficulty accessing their medications through the Medicare Part D program. Please contact the MMA hotline if your client needs assistance with any of the following Medicare part D issues:

- Pharmacy billing issues;
- Incorrect LIS co-pay amounts;
- Plan denies specific drugs;
- Medicare Part D plan enrollment issues;
- Pharmacy is unable to determine if a medication is covered by Part B, Part D, or Medicaid;
- Or any other Medicare Part D related issues.

Please fill out and fax a SDS 0728 to 503-945-6606, or e-mail it MMA.REFERRALS@dhsoha.state.or.us.

MMA hotline 1-877-585-0007: The MMA team's main purpose is to make sure our Medicaid/Medicare clientele get the services they need timely and efficiently, ensuring their health and safety is not compromised.

Buy-in Unit: The process of the state paying for either the Part A and/or Part B Medicare premium. Please contact the Buy-in specialist who covers your branch area with questions.

The Department pays the Medicare, **Part A and/or** Part B premium for certain clientele who are eligible for Medicare. If you have questions general question:

- Medicare coding;
- Initiating or stopping the buy-in process;
- Potential buy-in eligible;
- Retro premium eligibility;
- Delayed premium reimbursements ;
- MIB coding;
- Buy-in start dates;
- Medicare A and or B coverage start dates;
- Medicare B penalties;

*Oscar - Alisa Mitchell, Portland*

**Buy-in specialist contact information:**

- Ed Hunt 503-945-6833, ED.R.HUNT@dhsoha.state.or.us branches 1800-2699
- Elvie Gilbert 503-945-6644, Elvie.GILBERT@dhsoha.state.or.us branches 2700-9999
- Julie Kanally 503-945-6594, branches 0000-1799
- Support staff: Bill Eldridge, William.ELDRIDGE@dhsoha.state.or.us, 503-945-6617
- **Buy-in email:** Buy-In.Medicare@dhsoha.state.or.us.

*Kesha Baxter, MMA team & Buy-in Unit, Kesha.l.baxter@state.or.us*