

In the Loop

Turbo Tax applications

DHS started receiving faxed applications from Turbo Tax in mid-January. These applications caught us by surprise and there was no coordination provided by Turbo Tax or the Food and Nutrition Service in advance of these applications.

After some national conversations with the Food and Nutrition Service, Turbo Tax independently decided on February 1st to link individuals to Oregon’s online application instead of using the paper application. The new process has slowed the number of applications received by the Department, and the applications are no longer being pre-filled with information from individual’s tax returns.

Conference calls are conducted weekly if you have any questions about processing these applications. All are welcome to participate in the calls. The information about how to participate is in the transmittal [SS-IM-15-003](#).

SNAP Policy Unit

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Hunger facts:

- Oregon Food Bank distributed over 7.2 million pounds of fresh produce in 2013-14, a 20% increase over the previous year;
- Your \$10 donation provides 30 meals for people facing hunger.

FSAM updates

The Field Staff Assistance Manual ([FSAM](#)) has several updates with more to come:

- I.B: [Acronyms](#) has a repaired link and updated acronyms;
- II: [Privacy and security](#) is new! The section includes Oregon ACCESS sub administrator procedures and the RACF manual;
- III.B: [Returned checks](#) now has current information on returned revolving fund checks;
- III.D: [Special cash pay](#) has updated language and form links;
- III.E: [Check signing machine](#) sections have moved, there is new and updated language, additional information, and current procedures around signature plates and internal controls;
- III.F: [Replacement of lost checks](#) now has updated language and links;
- III.G: [Receipting monies](#) is updating with current codes and procedures;
- III.I: [Direct deposit](#). The entire section has been replaced with current accurate information;
- IV.A: [Criminal records check](#) has updated language, links, and now includes the Background Check Unit;
- VI. [View Direct](#) is an entirely new section with information on usage and reports in the View Direct system;
- VII: [Mail and shipping](#) is completely updated with clear language and current procedures;
- X.H: [Medical cards](#) was removed from another section and added to the *Miscellaneous* section. The procedure to issue a temporary card has been updated;
- XI.B: [Disposing of office equipment](#) section is revised with current procedures and information on the surplus resale program for state and federal inventory items and links to resources;
- XI.C: [Notary public](#) includes information on how to become a notary, obtaining stamps and journals, retention, and links to the Secretary of State site for more information.



Hilly - Kris
Boler, The
Dalles

SNAP medical deductions verification

Workers who see clients in their home can narrate verification of eligible medical deductions and do **not** have to keep copy of the bill in the file.

The narration needs to be specific and clear. If the bill is not on file, the narration has to include the name of the entity owed the money and how much the monthly payment is for ongoing months. Narration should also state the bill was viewed.

The additional narration should prevent errors and reduce mail costs as well as, hopefully, saving time in the office. For more information on medical deductions in the SNAP program, see the SNAP manual, [chapter F.19](#). Thanks SNAP!

Office 2013 tools

In case you missed it, DHS Shared Services sent an email at the end of January with links to training and tools for using Office 2013. If you are migrating from Office 2010 to 2013, the transition will be pretty easy; if you have an older version of Office, be prepared for a LOT of changes.

Before Office 2013 lands on your computer, review the training videos on the Microsoft Office [website](#). Bookmark this page and come back often!

Find the program you want to review, click the icon, choose your skill level, and your topic. The videos are all very short so you can squeeze them in when you have five minutes (or less).

The DHS intranet site has [Quick Reference Cards](#) you can view or print on each of the Office programs. These are a handy way to quickly remind yourself about the information from the videos you use every day. For more detailed assistance, consult the [manuals](#) linked from the same page.



Background Check Unit (BCU) – What’s NEW for QEIs/QEDs

Long Term Care Registry, an Upgrade of Criminal Management Systems CRIMS

The online Long Term Care Registry, an upgrade to CRIMS was implemented at the beginning of January. Currently over 7,000 Subject Individuals (SIs) have been added to the Registry and can now enjoy the opportunity of statewide portability and faster hiring times due to Registry status. In collaboration with APD, DD, AMH, OAAPI, and OLRO, the BCU is now working on finding additional efficiencies in Rule and expanding portability where possible. If you have any questions, please contact BCU.LTCR@state.or.us or call the Registry Info line at 888-272-5545 option 7.

A Special Thanks to APD:

BCU would like to give special thanks specifically to APD for having the most responses in the BCU QED Survey completed January 2015. Out of 405 responses, APD scored highest for participation with 328 responses, representing 80% of total QEDs surveyed. Of that percentage, 10% of QEDs were willing to assist with training and 39% of APD QEDs have over 5 years experience as a QED.

We are fortunate to have such a great array of workers with experience and talent. **Next steps:** BCU will be reaching out to those QEDs who responded regarding development and use of training materials.

Have a great Spring and remember... **“Alone we can do so little; together we can do so much.” (Helen Keller)**



Durin - Karen
Kaino, Central
Office

Past issues of *In the Loop* and indices are on the APD Field Services web page: www.dhs.state.or.us/spd/tools/field/index.htm.

January 2015 honor roll

100% accuracy!

0313 Milwaukie APD	100%	1611 Prineville APD	100%
0411 Warrenton AAA	100%	1612 Madras APD	100%
0914 Redmond APD	100%	2019 Cottage Grove AAA	100%
1211 John Day APD	100%	2711 Dallas AAA	100%
1311 Burns APD	100%	3112 Enterprise APD	100%
1513 Medford SSO	100%		

90% or better accuracy!

2518 Portland West AAA	96.00	3211 Florence AAA	93.33
2411 Salem AAA	95.56	0310 Canby APD	92.86
3617 McMinnville AAA	94.74	3111 LaGrande APD	92.86
0111 Baker City APD	93.33	2011 Eugene AAA	92.50
0311 Oregon City APD	93.33	1017 Roseburg DSO	92.00
0314 Estacada APD	93.33	2211 Albany AAA	92.00
2311 Ontario APD	93.33		

51% of all AAA and APD branches are on the honor roll!

SB21 update – The report is complete!

Over the last year, we have provided you with updates (and thanks) on the work of SB 21, APD’s planning process for the future of Oregon’s long term services and supports. This work included the partnership with advocates and stakeholders who served on the SB 21 Steering Committee, the research and recommendations of stakeholders and staff on the four SB 21 subcommittees, and the work and participation of local AAA and APD offices during the SB 21 community tour last fall.

In December and January, APD worked with the Steering Committee on drafting the final report, and submitted the final version to the Legislature by February 1. The report details the recommendations for future planning, including a time line for implementing strategies that strengthen choice, independence, and service equity for older adults and people with disabilities.



Willie - Scott Dietrich, Roseburg

Among the strategies, the Steering Committee recommended an emphasis should be placed on three areas: housing, transportation and caregiving. You can access the full report at: <http://www.oregon.gov/dhs/spwpd/LTC30SteeringCommittee/SB%2021%20Report%20-%20Final.pdf>.

March 2015 training calendar

Monday	Tuesday	Wednesday	Thursday	Friday
<p>2 Cultural competency and diversity (8:30 - 4:00)</p>	<p>3</p>	<p>4</p>	<p>5</p>	<p>6 Cultural competency and diversity, Portland (8:30 - 4:00)</p>
<p>9 Ask diversity, Portland (9:00 - 4:00)</p>  <p>Zorro - Kathie Young, Medford</p>	<p>10</p>	<p>11 Oregon ACCESS basics (8:30-4:30) Ask diversity (9:00 - 4:00) Cultural competency and diversity (8:30 - 4:00)</p>	<p>12 Oregon ACCESS basics (8:30-4:30) Cultural competency and diversity (8:30 - 4:00)</p>	<p>13</p>
<p>16</p>	<p>17 Independent Choices program (8:30 - 4:30) Ask diversity (9:00 - 4:00)</p>	<p>18 Advanced service planning (8:30 - 4:30)</p>	<p>19 Advanced service planning (8:30 - 4:30)</p>	<p>20</p>
<p>23 Eligibility 201 (1:00 - 4:30)</p>	<p>24 Eligibility 201 (8:30 - 4:30) Ask diversity (9:00 - 4:00)</p>	<p>25 Eligibility 201 (8:30 - 4:30)</p>	<p>26 Eligibility 201 (8:30 - 4:30)</p>	<p>27 Eligibility 201 (8:30 - 12:00)</p>
<p>30</p>	<p>31 Cultural competency and diversity (8:30 - 4:00)</p>	<p><i>Dates and availability of classes are subject to change. Please review availability on the DHS Learning Center.</i></p>		



“Together We Make a Neighborhood” poster contest

Here is an opportunity for kids to get out their crayons, markers and other styluses! The Fair Housing Council of Oregon is now accepting entries for their 17th Annual Fair Housing Poster Contest.

The contest, which is open to children from 1st to 8th grade, is a wonderful opportunity to educate young people about their civil rights in housing; it is illegal to discriminate against families with children and people with disabilities, as well as discriminating based on race, religion, ethnicity, etc. For more details on protected classes visit www.FHCO.org.

The ten top contest entries receive cash awards. Thousands of copies of the grand prize winning poster will be on distributed venues throughout Oregon. Every child who enters receives a certificate. Entries must be received by March 6th 2015 by the end of the business day.

Posters must be horizontally oriented on an 11 x 17” sheet of paper or poster board. Details and contest brochure are available at www.fhco.org/contest.htm.

The Fair Housing Council of Oregon (FHCO) is a nonprofit civil rights organization driven to eliminate illegal housing discrimination through enforcement and education across Oregon. FHCO promotes equal access to housing by providing education, outreach, technical assistance, and enforcement opportunities specifically related to federal, state, and local fair housing laws. These laws protect against illegal housing discrimination based on “protected class status” in any housing transaction and, in fact, any housing situation. FHCO offers a free, confidential hotline for those with fair housing questions: 800-424-3247 Ext. 2.

Federally protected classes under the Fair Housing Act include: race, color, national origin, religion, sex, familial status (children), and disability. Oregon law also protects marital status, source of income, sexual orientation, and domestic violence survivors. Additional protected classes have been added in particular geographic areas; visit www.FHCO.org/mission.htm and read the section entitled “View Local Protected Classes” for more information.



2014 Grand Prize winner

To learn more: Learn more about fair housing and/or sign up for our free, periodic newsletter at www.FHCO.org. Questions about this article? Contact Jo Becker at jbecker@FHCO.org or 800/424-3247 Ext. 150.

Want to schedule an in-office fair housing training program or speaker for corporate or association functions? Visit www.FHCO.org/pdfs/classlist.pdf.

This article brought to you by the Fair Housing Council; a civil rights organization. All rights reserved © 2015. Write jbecker@FHCO.org to reprint articles or inquire about ongoing content for your own publication.

Roseburg food drive events

Thanks to Jacquelyn Paxton for sending this in!

The Roseburg APD office kicked off the food drive with their Managers Race for the food drive. The Managers Race is a great event where the four managers raced against



The cheering crowd - look at all those flags!

each other in three minute-to-win-it games and then they put on a box car and raced around the office to the finish line. They sold flags for a dollar and raised \$84.00 for the local food bank.

In addition to the race, Roseburg hosted a 50/50 Super Bowl Board and a dessert auction. Upcoming events include the annual [Cans Food Festival](#), a raffle, and a canned food contest (who can bring in the most cans for the month).



L-R: Tom Maloney, Merry Bayly, Gina Graham, Kathy Shipman



Winning manager Gina Graham and her supporters. Congratulations Gina!

EAU – Mortgage statement

The Estate Administration Unit (EAU) truly appreciates information provided by case managers in Oregon ACCESS. One key component of estate recovery is the current mortgage status. It would be very helpful to EAU if case managers were able to obtain a copy of the most recent mortgage statement, narrate in Oregon ACCESS, and then keep a copy in the branch file.

This would be particularly useful in circumstances where the client has signed a line of credit note, secured by a trust deed. The mortgage statement will give EAU some idea of the amount encumbering property before determining if we will nominate an attorney to probate the estate in circumstances where the family declines to do so.

Kathleen E. Rossi, Estate Administration Unit

March 2015

- Brain injury awareness month
- Multiple sclerosis awareness month
- Optimism month
- Social work month
- Mar. 1 - 7: Consumer protection week
- Mar. 8 - 14: Universal women’s week
- Mar. 16 - 22: Wellderly week
- Mar. 22 - 28: National cleaning week
- Mar. 1: World compliment day
- Mar. 6: Employee appreciation day
- Mar. 8: Daylight savings time begins
- Mar. 16: St. Urho’s day
- Mar. 19: Operation Iraqi Freedom day
- Mar. 20: Vernal equinox
- Mar. 21: World Down Syndrome day
- Mar. 26: Purple (epilepsy) day
- Mar. 30: World bi-polar day

March 2015 Community Based Care payment schedule

March provider service payments for the APD and DD 512 Programs will issue the night of Sunday, March 1st, and mail to providers the next business day, Monday, March 2nd.

January Provider payments for the CEP Program will issue the night of Monday March 2nd and mail the next business day, Tuesday, March 3rd.

The difference in payment schedules is as follows:

- CBC payments issue the night of the first date of each month and mail the next business day.
- CEP payments issue the night of the first business day of each month and mail the next business day.



Ruger - Aaron
Malvaney,
Redmond

Direct Deposit (EFT) payments will also issue per the schedule above.

However, rather than being mailed, they will be sent to the Department of Treasury and 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 for CBC programs will be available on or before 11:59 pm of Wednesday, March 4th.
- EFT payments for the CEP program will be available on or before 11:59 pm of Thursday, March 5th.

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

Beaverton food drive events

Thank you to Paula Casner!

Beaverton has filled to the 2/3 mark a large food bank collection barrel, has given donations of \$64 generated through raffling lunches donated from local restaurants, donations of \$25 through payroll deductions, and have a Healthy Soup and Salad potluck lunch to which staff contribute \$4-5 each to raise more money for the Food Drive.



Don't forget! Make sure the medical application used for the current eligibility decision is in the office file. DO NOT archive or destroy the application, regardless of how old it is! Auditors cite errors because we cannot prove we ever had an application. This is not a new requirement....

Send in branch photos and news stories to karen.l.kaino@state.or.us to share!

OSIPM/MAGI matrix

A comparison matrix explaining the differing eligibility criteria, benefits, and program options available to individuals who apply for medical benefits is available on the case management tools [webpage](#). Please see [APD-PT-15-005](#) for information and a copy of the matrix.

Please use the comparison chart to ensure medical policy is correctly applied when determining benefits.

Tracking transferred cases

A recent, continuing audit has illustrated many offices do not narrate if they transfer a hard or electronic copy of the file, or send the file to Archives on transfer.

If the type of transfer is not narrated, we struggle to locate the file if it is needed for an audit or to reopen a closed case. Instead of narrating “Case transferred to XXX”, we would appreciate something like “Hard file transferred to XXXX” or something similar. Thank you!

Completing an MSC 443 form

The [MSC 443 DHS.OHA Administrative Hearing Request](#) form is how a hearing request is communicated to a Hearings Representative. Getting the MSC 443 correct the first time will save you, the hearings coordinator, and the hearings representative time and effort. A correctly completed form also helps the Agency meet the legal obligations of the hearings process.

Here are a few things to remember when filling out the MSC 443:

1. Determine which branch or program (APD, SSP, etc.) issued the contested decision. Complete the top of the 443; you are acting as “DHS”;
 - *Date of notice*: “Date sent” from the contested notice being. If the notice was by the system, this date is on LOGI.
 - *Date 443 Received by DHS or OHA*: Date the branch received the 443. For SNAP, it is the date the customer made a verbal or written request for hearing;
 - *Program #*: 1, A1, 3, B3, 4, D4, P2, 5, 6 (SNAP), or DD;
 - *Cost center*: Branch number;
 - *Case number*: The UCMS case number for medical or services; “F” and EBT number for SNAP;
 - *Worker ID*: Worker load code.
2. Send all required documents to the hearings coordinator:
 - APD hearings cover sheet;
 - Completed MSC 443 (both pages!);
 - The notice being appealed.
3. Hearings requests should be referred to the APD Hearings Coordinator by scanning all documents and emailing them to apd.hearings@state.or.us; do not fax requests.



Otis - Tracie Safley,
Klamath Falls

For more information on completing a hearing request, please see the APD Hearings [website](#).



Don't forget!

If it isn't signed,
it isn't valid!

Check for

signatures on all documents a customer is required to complete. Don't forget to get signatures on provider forms and the vouchers. If the form isn't signed, you cannot act on requests or issue payments. YOUR signature is required as a witness on some forms also – make sure you check those lines!



Chase and Milo
- Gary Williams,
OLRO

The Dalles food drive

Thank you to Carri Ramsey-Smith!

The Dalles APD had a soup lunch by donation on February 3rd. A big pot of delicious, homemade chicken noodle soup – perfect for a rainy day! The hot soup was well received!

Instead of a pot of soup we now have a pot of gold thanks to Friday's donations. We are at a great start of \$85.00 PLUS 3 payroll deductions (3 x 144.00 = \$432) thus giving us a GREAT start of \$517.00!!! We are also collecting canned food and selling nachos.

Gatekeeper program rolls out statewide

What is it? Gatekeeper programs train employees of community businesses and organizations to recognize and refer at-risk older adults and people with disabilities to the Aging and Disability Resource Connection (ADRC). The program provides basic training to postal workers, meter readers, financial institutions, emergency responders, social service agencies, and others in how to recognize warning signs and make a referral to the ADRC.

The investment: In 2013 and 2014 Oregon's legislature invested to greatly expand the Gatekeeper program to more communities across Oregon. The program is now available in the following counties: Baker, Benton, Clatsop, Clackamas, Columbia, Coos, Curry, Douglas, Grant, Harney, Jackson, Josephine, Lane, Lincoln, Linn, Malheur, Marion, Morrow, Multnomah, Polk, Tillamook, Umatilla, Union, Wallowa, Washington, Yamhill. The remainder of the counties is expected to be operational by spring 2015.

Outcomes to date: Gatekeepers are trained to recognize potential warning signs, such as:

- Caregiver stress;
- Financial issues;
- Social isolation;
- Appearance of the person;
- Physical limitations.



Communication issues: Since September 2014, 293 businesses/agencies have become Gatekeepers. Through January 2015, 466 Gatekeeper calls have been received by ADRCs. Of those calls, 106 have been referred to Adult Protective Services; the remainder was followed-up on by staff from the local ADRCs.

To find out more about the Gatekeeper Program in your area, please call: Kristi Murphy at 503-945-6181 or email at Kristi.m.murphy@state.or.us.

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 Kaino by phone, 503-569-7034, email: karen.l.kaino@state.or.us, or IM.

Q: Am I doing the right thing by offering voter registration to customers who can't vote because they are not citizens?

A: Yes you are! I know it seems odd to ask if they want to register to vote when the customer just told you they are not a citizen, but the Act does not allow for any person to be left out of the process. Also, remember there are non-citizens who can register to vote – we don't have a list of who they are, but those folks may be in our offices. Ask every person, every time – no exceptions!

Q: Does page 8 of the application still count as a declination?

A: Yes it does. Any DHS form with the voter registration question on it – applications, address changes, interim change reports – replaces the separate [MSC 503D](#), *Oregon Voter Registration Declination Card*. You do not have to complete both. Please make sure the question is completed. By the way, you also do not need to initial by the question if you are the one who marks the box.

Q: Do you need a copy of page 8 (or whatever) in the declination file?

A: I do not! If your office is audited and the auditor wants to see the application page, or whichever form was used as the declination, we will make a copy at that time and redact everything not related to voter registration. Making copies before they are needed is too much work and probably a huge waste of paper.



Pepe, Spike, and
Sophie - Sarah
Minier Johnson, HR

Q: I am having difficulty deciding how to count declination. How do you count it when a customer registers to vote but tears off the declination part and marks the box yes?

A: About 7-ish years ago, every office was instructed to track every yes and no response, the number of declinations, and the number of cards handed out. But it was only needed for 30 days and NO ONE told the offices to stop collecting the data. So....if your leadership team wants that info tracked, go for it, but no one else is going to check it. All you need to track is the number of completed registration cards mailed by your branch for the weekly report. I am so sorry if you are still collecting this!

Q: Where can I find the voter registration deadlines?

A: The APD Field Services [webpage](#) has a section called *Voter Registration* with the [deadlines](#) and lots of other information. If for some reason you can't print from the website, send an email to karen.l.kaino@state.or.us and I will send it to you as an attachment.

Q: Do I count the registration card if the customer takes it with them?

A: You do not. Only count and report registration cards mailed to County Elections from your office. If they customer takes the card away and we never see it, it's not our problem.

Health Insurance Group

New way to report third party insurance

The Health Insurance Group (HIG) is proud to announce a new internet based web form for reporting third party insurance (TPL). Effective immediately, anyone with access to a computer or mobile device and the internet can report insurance using this exciting new tool. **It is intended to be used by workers, providers, and CCOs and customers.**

The online web form was designed to make TPL reporting quick and easy and at the same time provide HIG the information they need to process TPL referrals. The web form uses drop down menus, radio buttons and data entry fields to collect information.

The first thing you need to do to use the form is to gather details about the TPL such as the name of the insurance, policy holder, and who is covered by the insurance, etc. This information should be available on medical applications, insurance cards, or you may need to obtain it from the customer or other source.

Important things to know:

- To comply with HIPAA security requirements, ***HIG can no longer accept the 415H by fax after March 31, 2015.*** The web form is the preferred method to report TPL;
- You can preview the web form and receive a short training by [clicking on this link](#);
- HIG requests all staff use the web form instead of the paper 415H with the exception of emergent requests;
- For emergent requests continue to contact HIG by phone (503) 378-6233 or by email REFERRALS,TPR or tpr.referrals@state.or.us;
- Do not use the web form to request Rush Processing. HIG only receives the web form files one time per day;
- When you submit the web form, you will get a confirmation email with tracking number and can also print or save a summary page for your records.



*Gally - Max Brown,
Central Office*

Who to Contact for questions or assistance

- **To check on the status of TPL** please contact HIG, 503 378-6233 or by email tpr.referrals@state.or.us;
- **For operational needs with the form**, please contact Carolyn Thiebes, 503 378-3507 or by email: carolyn.thiebes@state.or.us.

Excel tip - Split windows

To see two Excel workbooks at the same time, click on the *View side by side icon*. You can now see two workbooks at the same time, To prevent them scrolling at the time, unclick the *Synchronous Scrolling icon*.

