

APD/SSP/CW Regional Meetings 2014

Tips and Tools
Packet 3

This page intentionally left blank

Table of Contents – Tips and Tools

[1] Aging and People with Disabilities

- Check OREGON ACCESS Before Setting Up a New Case_____1

[2] Office of Payment Accuracy and Recovery- Client Maintenance Unit

- WEBM FIND and MMIS More Important Than Ever_____3
- Incarceration Procedures - SNAP _____4
- Incarceration Procedures - Medical_____5
- Removing Deceased Clients from the CM System _____11
- Merging Primes_____12
- Tips for Service Cases _____13
- Third Party Insurance - Quick Reference Guide _____14

[3] Child Welfare

- Domestic Violence Information Sharing Between Child Welfare and SSP____15
- A & D and Mental Health Info Sharing Between Child Welfare and SSP ____ 16
- Information Sharing with SSP in Open Common Cases Matrix _____17
- How to use the OR-Kids Viewer - Quick Reference Guide_____20

[4] DMAP - Division of Medical Assistance Programs

- How To Get Access In MMIS _____30
- HZIP And Other Tools To Ensure Correct Addresses_____32
- CCO Provider Change Request Guide_____ 36

5] Office of Program Integrity

- SNAP QC Error Trends_____42
- ERDC QC Error Trends_____44
- TANF QC Error Trends _____45

Topic	Oregon Access CI Search Reminder
Prepared by	APD

Individuals should always search Oregon ACCESS before setting up a new case

Searching in Oregon ACCESS utilizes CI database. The CI database is the Department’s official person registry and it contains more client records than the Oregon ACCESS database. If the person is not found in CI, the user will then be able to search the full OA database. A new record should only be created after performing a complete search.

Please refer to IM-09-097

(<http://www.dhs.state.or.us/policy/spd/transmit/im/2009/im09097.pdf>) for additional information.

When searching, use the following guidelines:

- Search by SSN. If the SSN is found, check to be sure it is the correct person;
- Search by name. Use the first three letters of the first name and the first three letters of the last name (i.e. SMI, DOR 03/15/1950). This will display a list of potential matches, even if the name is misspelled;
- If the person is not in the list, try using the date of birth in addition to the name as described above;
- If the person is found, but has incorrect information, such as a misspelled name, incorrect SSN, or incorrect date of birth, do not create a new record. The incorrect information can be corrected much easier and faster than merging duplicate records;
- If the person is not found, create a new record.

Search Scenario #1: Person is found in CI and there is a registered Oregon ACCESS record associated to the CI record.

In this circumstance, the user is enabled to click on the individual and go to the Person Details window. There should not be a reason to create a new record.

Search Scenario #2: Person is found in CI, but there is no registered Oregon ACCESS record associated to the CI record. In this circumstance, after you click on your person in the search return list, the user may download the CI record to Oregon ACCESS. If a match is found among the OA search results, the user may view the record. At that point, the user may register/re-register, as necessary.

If no match is found among the Oregon ACCESS search results, the user may continue with the download process.

Search Scenario #3 - The Person is not found in CI.

In this scenario, the user has performed a CI search, but does not find a record that matches their client's data.

The user may click on the No Match Search in OA button. The system will perform a search of the Oregon ACCESS database, using the same search criteria that were entered to initiate the CI search.

If the record is found in the OA search results, the user may click the View Person button to go to the Person Details Window. At that point, the user may register/re-register, as necessary.

If the person is not found in the Oregon ACCESS search results, the user may create a new Oregon ACCESS record.

Topic	Checking WEBM, Find and MMIS Is More Important Than Ever
Prepared by	Client Maintenance Unit – CMU/OPAR

Check WEBM, FIND

It is extremely important to do a WEBM, FIND in the mainframe and check MMIS before creating a new case. Why?

Because if there is already an open case with APD, SSP or CW that case needs to be closed before you take any actions. Technically MMIS will allow two open cases but it causes problems such as:

1. Each time a worker takes an action, it flips back to that case. So if the SSP worker takes an action, that case takes over, then when the APD worker takes an action it flips back to that case.
2. If the APD worker is trying to backdate the SMB/SMF or another Plus benefit case is ongoing, the system will reject your action. You will have to start your eligibility after the Plus case is closed so the client will get the proper reduction notices.
3. **CMU cannot process a 148 that requests a reduction of benefits**, another important reason to check the Mainframe first to be sure there is no other ongoing case.

How to use WEBM, FIND to locate clients:

In the CM system type WEBM, FIND, [and]

1. The client's social security number or,
2. The client's first and last name. If the person has two last names search using both names, for example:
 - o Joshua Jackson Smith - Search Jackson Smith and Smith Jackson *or*
 - o Search without the space in the person's name for example: JacksonSmith

In the long run, taking this step can save you or other staff a lot of time correcting errors.

As always, if you have any questions, or need assistance CMU is here to help. CMU can be reached at 503-378-4369, Fax 503-373-0357, or E-Mail at client.maintenance@state.or.us

These tips can also be found at <http://inside.dhsoha.state.or.us/asd/opar/opar-cmu.html>

Topic	Incarceration Case Procedures - SNAP
Prepared by	Data Match Unit –OPAR

Responsibility of OPAR – Office of Payment Accuracy

OPAR’s Data Match Team receives weekly reports from the Department of Corrections and daily reports from county jails listing individuals incarcerated in their facilities. The Data Match Team uses these reports to identify individuals who are incarcerated and who are receiving SNAP. In most cases the team will end benefits, but there are some restrictions on the cases they can close for both medical and SNAP. Medical cases will be suspended (for clients expected to be incarcerated less than one year) or closed (for clients expected to be incarcerated over one year).

OPAR will close SNAP benefits for one person households, or contact the branch with the information on the incarcerated individual if there is more than one person on the case. The branch should take the appropriate action to reduce benefits. Remember the 10-day notice guidelines must be followed. For more information see the [Family Service Manual, SNAP H.5, Prison discrepancy list.](#)
(<https://apps.state.or.us/cf1/EligManual/EMnlFrame.htm?Page+ID=06-toc>)

Responsibility of DHS branches

If Data Match cannot suspend/close a medical case they will send an alert to the branch office. **If you receive one of these alerts please take action to close as soon as possible before additional benefits are issued.**

Responsibility of APD branches

For clients with benefits issued through APD see [House Bill 3536 Procedures](#) (http://www.dhs.state.or.us/spd/tools/mh_inmate/) on the APD Staff Tools website.

Reminder: Even if the case is in SRS, once you are notified of the change in household you need to take action even though the client wasn’t required to report the change. Remember to take action on all cases with incarcerated clients in the benefit group.

Topic	Incarcerated Case Procedures-APD Medical
Prepared by	Data Match Unit – DMU/OPAR

House Bill 3536 Procedures

House Bill 3536 mandates DHS/OHA suspend Medical benefits on any client who is receiving Medicaid and who becomes incarcerated at a local jail. This bill extends the process created under SB913, where benefits of clients who have a severe mental impairment were suspended.

An inmate is an individual living in a [public institution](#) who is:

- Confined involuntarily in a local, state or federal prison, jail, detention facility, or other penal facility, including a person being held involuntarily in a detention center awaiting trial or a person serving a sentence for a criminal offense;
- Residing involuntarily in a facility under a contract between the facility and a public institution where, under the terms of the contract, the facility is a public institution;
- Residing involuntarily in a facility that is under governmental control; or
- Receiving care as an outpatient while residing involuntarily in a public institution.

An individual is no longer an inmate when:

- The person is released on parole, probation, or post-prison supervision;
- The person is on home- or work-release, unless the person is required to report to a public institution for an overnight stay; or
- The person is staying voluntarily in a detention center, jail, or county penal facility after his or her case has been adjudicated and while other living arrangements are being made for the individual.

A public institution is any of the following:

- A state hospital (as defined by ORS 162.135) such as the Oregon State Hospital, Eastern Oregon Psychiatric Center, and any other hospital established by law for similar purposes, including the "SAIP" means Secure Adolescent Inpatient Program (SAIP), and the Secure Children's Inpatient Program (SCIP).
- A local correctional facility (as defined in ORS 169.005): a jail or prison for the reception and confinement of prisoners that is provided, maintained and operated by a county or city and holds persons for more than 36 hours.
- A Department of Corrections institution (as defined in ORS 421.005): a facility used for the incarceration of persons sentenced to the custody of the Department of Corrections, including a satellite, camp, or branch of a facility.
- A youth correction facility (as defined in ORS 162.135):
 - A facility used for the confinement of youth offenders and other persons placed in the legal or physical custody of the youth authority, including a secure regional youth facility, a regional accountability camp, a residential academy and satellite, and camps and branches of those facilities; or
 - A facility established under ORS 419A.010 to 419A.020 and 419A.050 to 419A.063 for the detention of children, wards, youth, or youth offenders pursuant to a judicial commitment or order.

As used in this rule, the term public institution does not include:

- A medical institution as defined in 42 C.F.R. 435.1009;
- An intermediate care facility as defined in 42 C.F.R. 440.140 and 440.150;
- A publicly operated community residence that serves no more than 16 residents, as defined in 42 C.F.R. 435.1009; or
- A child-care institution as defined in 42 C.F.R. 435.1009 with respect to:
 - Children for whom foster care maintenance payments are made under title IV-E of the Social Security Act; and
 - Children receiving TANF-related foster care under title IV-A of the Social Security Act.

If this policy indicates that the medical benefits of a client are suspended, a client meeting the eligibility requirements of a program is not required to submit a new application for the benefits to be reinstated.

Suspended Medicaid cases will remain in suspend status for up to 12 months. If the client is released within a year, Medicaid will be reinstated **if** the client is still eligible for assistance, the bill does not extend Medicaid eligibility to an ineligible person. For APD programs, not all clients will be eligible upon release, even if they are released within the 12 month time frame. Clients who had been receiving Waivered services, may need a new assessment before benefits can be reinstated. If SSA has terminated Medicare benefits, a QMB client would need to provide verification that Medicare has been reinstated before their QMB case can be reopened.

To reduce field staff workload, if OPAR receives incarceration information and the inmate has a projected release date within the current month, OPAR will take no action on the case. The effective date is the date the decision is made to suspend the benefits and the date the notice is sent.

OPAR will be taking the following actions on APD clients who become incarcerated and who have a release date after the current month. If a case is put into 'Susmend' status it will auto close at the end of 12 months. However, any action taken on the case will re-start the 12 month time frame. If action must be taken on a case in Susmend status, an ACCESS tickler should be set up to remind staff to close the case if the inmate has not been released within 12 months.

OPAR process for incarcerated APD clients

- Local jails and Department of Corrections (DOC) submit incarceration data to DHS twice a month. The incarceration information is used to identify recipients of SNAP and Medicaid benefits. When a client is identified as receiving SNAP or Medicaid benefits and is incarcerated, OPAR will take the following actions:
 - If there is just one person on the case (either SNAP or Medicaid) OPAR will take action. An exception to this is Medicaid cases coded with case descriptors APD, ICP, NFC, DAN or DDS or cases in pending status. These cases will be referred to [Lauren Mitchell](#), who will contact the financial worker or case manager handling the case. The financial worker or

case manager will be responsible for susmending/closing those cases.

- Medicaid cases will be '**susmended**' and SNAP cases will be sent timely notice and closed when appropriate. OPAR will send Medicaid clients an auto generated notice. Click here for copy of notice.
- OPAR will narrate action taken in ACCESS and field staff will be notified by tickler. Cases, other than OHP, will have 913 case descriptor added. OHP cases will have a DOC case descriptor.
- If a case has more than one person on the case, it will be referred to [Lauren Mitchell](#) who will contact the appropriate field worker.
- Jails will be asked to inform clients who have had their benefits susmended to contact their local office. Inmates must contact the local office within 10 days of their release. If the client has been released within 12 months of incarceration, and contacts the branch within 10 days, take these actions based on the specific type of case:
 - **SSI recipient**: Client was receiving SSI when they became incarcerated and case has been in susmend status for less than one year. Reopen the case without a new application, and tell the client they need to contact SSA and let SSA know they have been released. Client must provide proof of SSI reinstatement. If proof of reinstatement is not provided, determine eligibility for any other program.
 - **Protected Eligibility Groups**: (DAC/Pickle etc). If the case has been in susmend status for less than one year, reopen the case without a new application, and tell the client they need to contact SSA and let SSA know they have been released. Client must provide proof of SSA benefit restoration. If proof of reinstatement is not provided, determine eligibility for any other program.
 - **PMDDT client**: If the client is released prior to a medical review due date, reopen the case. If the client was incarcerated when the medical review was due, they will need to complete a new application and reapply for PMDDT and be redetermined to meet the disability criteria.
 - **QMB/SMB/SMF**: SSA does not maintain Medicare Part B eligibility for inmates. Typically an inmate will be released with

Part A and no Part B Medicare. **If this is the case, restore the case using an MIB 2 code. Contact the Buy-In unit via email (Buy-In.Medicare@dhsosha.state.or.us) and request Part B Buy-In.** If the client has maintained Medicare eligibility while incarcerated, QMB can be restarted the beginning of the month following release and no new application is required, SMB/SMF would be restarted the first of the month of release. If Medicare eligibility has ceased completely, the client will need to complete a new application when Medicare has been reinstated. Follow OAR guidelines to determine the effective date for beginning benefits.

- **Service cases:** If the client is incarcerated for less than 30 days, the incarceration is not considered a break in services and Medicaid can be restored without a new assessment or a new application. If the client is incarcerated for over 30 days, a new period of care begins and the client will need a new assessment and a new application. [461-001-0030](#)
- **EPD cases:** If the client is incarcerated for less than 30 days and can verify continuing employment upon release, restore EPD case. If client is incarcerated less than 30 days and cannot verify employment or is incarcerated over 30 days, they would no longer qualify for the EPD program and will need to complete a new application.
- **DOC case descriptor:** Some MAGI CMS cases will have a DOC case descriptor put on the case when the client becomes incarcerated. If you need to convert one of these cases, you will need to get the DOC case descriptor removed. Branch staff are unable to remove this code. If you need to remove the DOC case descriptor (for instance to change the case to a D4) contact [Lauren Mitchell](#).

[See SPD-PT-11-015](#)

Process to susmend cases in local office:

- On the Medical Assistance tab in ACCESS choose incm code of SUSM. Use todays date or date you are going to send the notice. Use reason code NI and add a case descriptor of 913. During

integration add the notice code of IC. CMS will stay in Susmend status for 12 months, and will auto close at the end of 12 months. The client will have been sent a notice of closure if you use the notice code IC, so no further action is required. If the client is released within the 12 month period, the case can be restored. If any action is taken on the case after it is susmended, it will impact the auto close and you will need to set a tickler and manually close the case in 12 months if the client has not been released.

Topic	Removing Deceased Clients in the Client Maintenance (CM) System
Prepared by	Client Maintenance Unit – CMU/OPAR

Please use these steps to enter date of death correctly.

Type of case	Incoming code	Effective date	In-grant code	CMUP “Medi Elig” Code	CMUP “Medi Elig” date
Deceased Individual is the only person on the case or the the only person receiving benefits on the case	Death	Date of Death*	Change to: DP -deceased parent-use for all adults; or DC -deceased child	Change to “D”	Actual Date of death
Deceased individual Is on a case with one or more additional recipients	Compute**	1 st of the next month	Change to: DP -deceased parent-use for all adults; or DC -deceased child	Change to “D”	Date of death

* If for some reason, the system will not let you back-date the effective date to the actual date of death use today’s date as the effective date and send a 148 to CMU to correct the date of death.

** If another action is taken later in the month, leave the Effective Date as the first of the next month. For example, a remaining case member calls to report a change of phone number. Leave the incoming code as “Compute” and the effective date as the first of the next month and update the phone number.

Please narrate the client is deceased, date of death, that a 148 was sent to CMU (if 148 was required).

Topic	Merging Prime Numbers
Prepared by	Client Maintenance Unit

Duplicate prime numbers continue to be a problem because they affect our client's ability to access care. When duplicate medical and SNAP benefits exist claims payment and access issues occur and child support payments may be delayed.

If a case is selected for a Medical, State or Federal review and duplicate payments are found they are cited as an error.

How are primes merged?

Due to changes in some systems including MMIS and OR-Kids, the process of merging primes has changed.

The Client Maintenance Unit (CMU) will be merging all medical primes. If you contact the Service Desk to merge two prime numbers a ticket will be created and sent to CMU.

To expedite the process please contact CMU directly: Phone: 503 378-4369, Fax: 503 373-0357 or email: cmaint@dhs.state.or.us.

Remember if there are open medical benefits on multiple prime numbers eligibility needs to be closed on all but one of the prime numbers before they can be merged.

Remember when it comes to prime numbers, more is not better!

Topic	TIPS for Service Cases
Prepared by	Client Maintenance Unit – CMU/OPAR

Service cases

- Remember to end services first when reducing benefits.
If it is not done in order, the actions reject and the worker is unaware, because they only get the Rejection error if they finish taking their action on the mainframe, saving it “Real Time”.
When this happens the old eligibility remains ongoing on MMIS until the worker finds out there is a problem.`
- If errors come up when trying to issue CEP vouchers there is usually an inverted line on WLGR.
WLGR is telling the system there was no IHC eligibility at that time. You can e-mail CMU or just give us a call and we can fix it immediately for you. A 148 is not needed since this is a System issue.
- Quite often if a worker is getting a 512 error CMU can help!
We can normally make corrections to WLGR and the worker is then able to finish their process. There are some issues with 512's that the Service Desk will have to handle but don't hesitate to check with CMU first.

Third Party Liability—TPL Quick Reference Guide

REFERRAL PROCESS

Notify HIG on a [MSC415H](#) when a client has third party insurance. Always report:

- ▶ When there is new TPL
- ▶ When the TPL policy changes
- ▶ When TPL ends
- ▶ At recertification if it has been more than 12 months since TPL was last verified.

TPL must be verified, even if a client says their TPL ended. Exemptions are not removed until HIG has verified the date the TPL ended.

Do not send duplicates of the same referral unless an emergency occurs. If you emailed the 415H and received auto reply from HIG, your referral was received and is in HIG's work queue.

EMERGENCIES

To get “Rush Processing” a Medicaid recipient must have been **denied medications or emergency treatment** due to incorrect information **already in** the TPL panel in MMIS. Rush requests are done on the [MSC415H](#) or the [MSC0156](#).

Requests that are for billing or CCO enrollment reasons do not meet Rush Processing criteria.

If you need rush processing write “Rush-Meds” or “Rush-denied treatment” in the subject line of your email or fax. (If this is not in the subject line, your request might be delayed).

EXEMPTIONS

- HIG adds a TPL exemption when a referral is received to prevent auto enrollment.
- Exemptions are not removed until the end date for TPL has been verified.
- Do not send referrals to remove “COT” (Cover Oregon Identified TPL) exemptions. HIG has already been notified of all COT exemptions. If the TPL has ended, the client is fee for service until the COT is removed.

GOOD CAUSE– DOMESTIC VIOLENCE

Notify HIG on the [MSC415H](#) or [MSC0156](#) if the TPL should not be pursued due to safety concerns with the policy holder or if the client cannot access their TPL in the area they live. Please state DV or GC in the request or the reason there is good cause. Clients with good cause cannot be enrolled into a CCO.

CONTACT HIG

Phone: 503 378-6233 — **Internal number for state staff only**

Toll Free: 1-855-999-6273 (can be given to providers or clients)

Fax: 503 373-0358

Email: tpr.referrals@state.or.us or REFERRALS TPR in Outlook

Mailing address: PO Box 14023, Salem, Oregon 97309

Health Insurance Premium Payment Questions: reimbursements.hipp@state.or.us

Topic	Domestic Violence Addendum – Info Sharing between Self Sufficiency and Child Welfare
Prepared by	Child Welfare

**Domestic Violence Information Protocols
On common cases currently open or being served**

POLICY: Domestic Violence information, or information from which domestic violence can be inferred, may be shared for purposes of child safety, benefit eligibility or service coordination by SSP with the CW program when there is a common case **unless**:

1. Perpetrator works for CW

Protocol: SS Case worker reports information to their Program Manager for action (or designee when the PM is not available);

2. Relatives of perpetrator work for CW

Protocol: SS Case worker reports information to their Program Manager for action (or designee when the PM is not available);

3. Perpetrator has a close business relationship with CW, such as a program partner or contracted worker

Protocol: SS Case worker reports information to their Program Manager for action (or designee when the PM is not available);

4. When DV victim affirmatively asks that information not be shared and the information in question doesn't otherwise trigger a mandatory report

Protocol: SS Case worker discusses with DV victim the victim's concerns about sharing and if needed, consults with their Program Manager, or designee when the PM is not available, to determine whether information may be shared in a manner that protects the victim but still achieves the purpose for which it is shared

NOTE: CW may share any DV information with SSP for Safety purposes, benefit eligibility or service coordination. If the suspected perpetrator works for SSP or one of SSP's contractors, CW will take actions it deems prudent to protect the child and/or victim.

Topic	Sharing of A & D and MH information between Child Welfare and Self Sufficiency
Prepared by	Child Welfare

Subject: Release of specially protected records across DHS CW and SS program lines without a signed release (with special focus on A&D treatment information)

Federal Regulations (42 CFR) protect certain A&D records from disclosure without a signed release. The following is information that is NOT protected by Federal Regulations and may be shared between the DHS CW and SS programs without a signed release:

- Observations of suspected substance abuse or mental health issues
- Any information the agency obtains prior to the diagnosis and/or treatment of an individual that does not originate from the A&D provider. This includes the screening and/or referral for an assessment, including the name of the treatment provider conducting the assessment (even if that provider eventually provides treatment).

Restriction: Any information obtained by the agency from the treatment provider at the point of or after diagnosis, including assessment, prognosis and treatment, referral for treatment or the name of the treatment provider, and including treatment attendance records, is protected and may not be shared without a properly executed release. However, information from the treatment provider that the client is a “no-show” for assessment or other non-treatment appointment arranged by DHS is not protected and may be shared without a release of information.

- Self-disclosed information about the existence of a substance abuse or mental health issue, including that client is receiving or has received treatment.

Restriction: Any written records disclosed by the client (whether physically provided or read to the agency) that originated with a treatment provider are protected and may not be shared without a properly executed release.

Applicability to Mental Health Records

Note: Disclosure of Mental Health records is governed by State Law (ORS 179.505), which is not as restrictive as the Federal A&D Regulations. In practice, however, it is not practical to treat A&D and MH records differently. Therefore, the more restrictive Federal A&D Regulations will apply to both A&D and Mental Health records. Mental Health records that fit within any bullet point above may be shared between programs without a signed release.

January 13, 2014

Child Welfare

Information Sharing with Self Sufficiency In Open Common Cases*

** Guideline: At a minimum share on Child Welfare and TANF Common Cases*

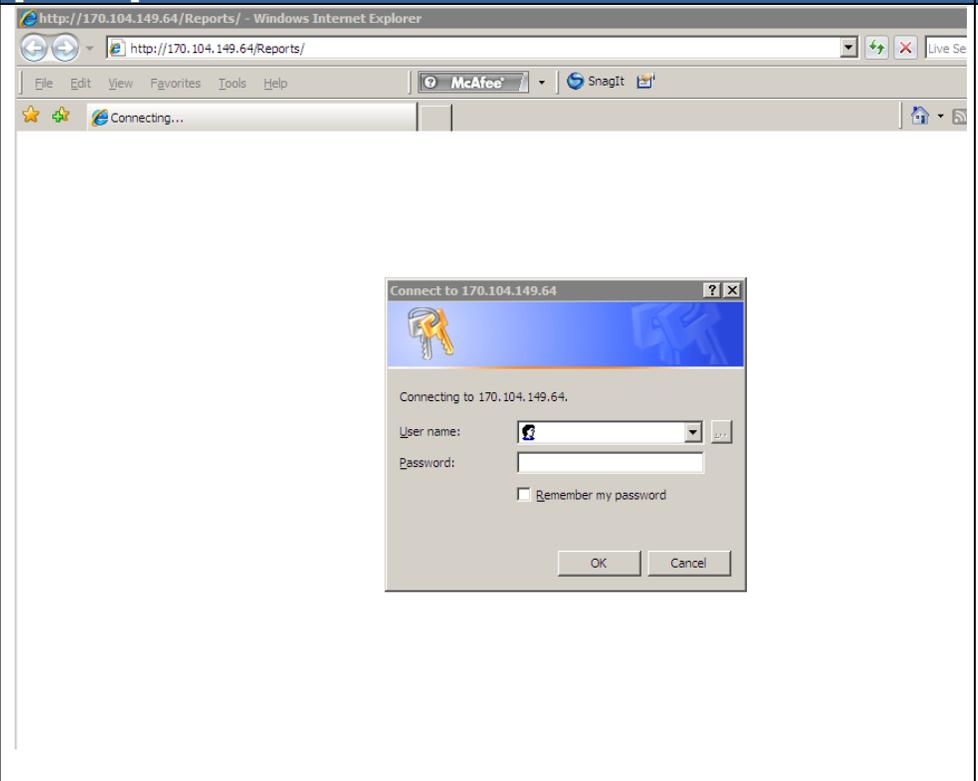
**How to determine whether SSP has an open TANF case:
Look on WEBM-Find and/or TRACS or Call SSP Office**

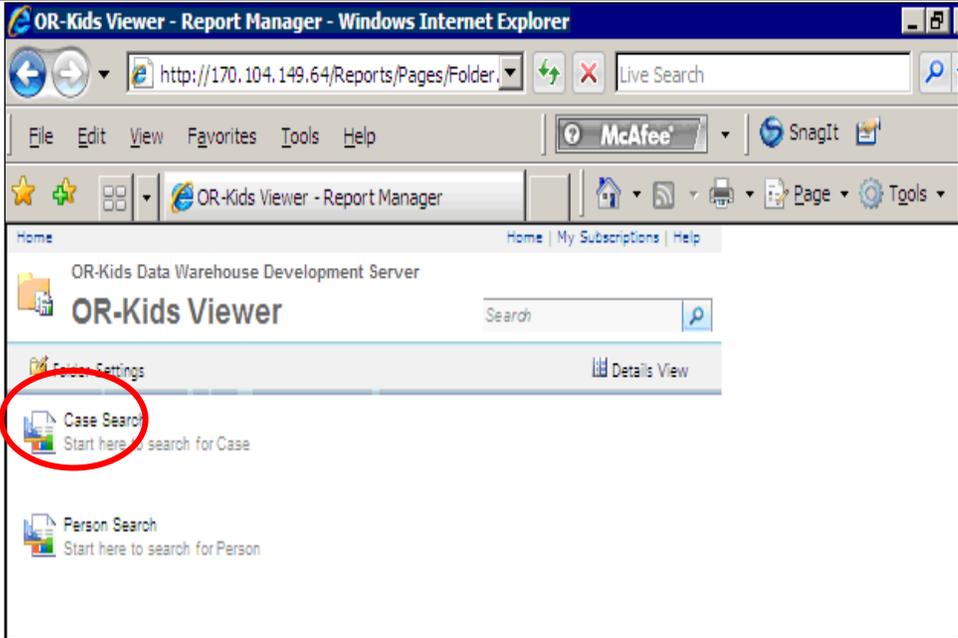
When to Share	What to Share with SSP	Why Information is Needed by SSP	Suggestions for Transferring Information
<ul style="list-style-type: none"> • When assessment is assigned • When/If Worker Changes 	Name/Contact Information of assigned CW Worker	<ul style="list-style-type: none"> ✓ Establish Communication ✓ So SSP Worker knows to whom information should be sent ✓ Provides opportunity to attend joint planning meetings if available 	<ul style="list-style-type: none"> • Contact SSP Office or Point Person • Contact ICC • Contact Lead Worker • Send info to Email Case Transfer Box (Branch email – Branch # can be found on WEBM-Find and email sent from MS Outlook) (last resort) • Screener identifies and documents SS worker
When Founded for abuse/neglect	Identity of Perpetrator (Founded CPS Assessment) and name of common case	✓ Child Safety	<ul style="list-style-type: none"> • Send information to SSP Point Person • Send information to Email Case Transfer Box
When child removed for 30 days or more	Date child removed	✓ Benefit Eligibility	<ul style="list-style-type: none"> • Send information to SSP Point Person • Send information to Email Case Transfer Box

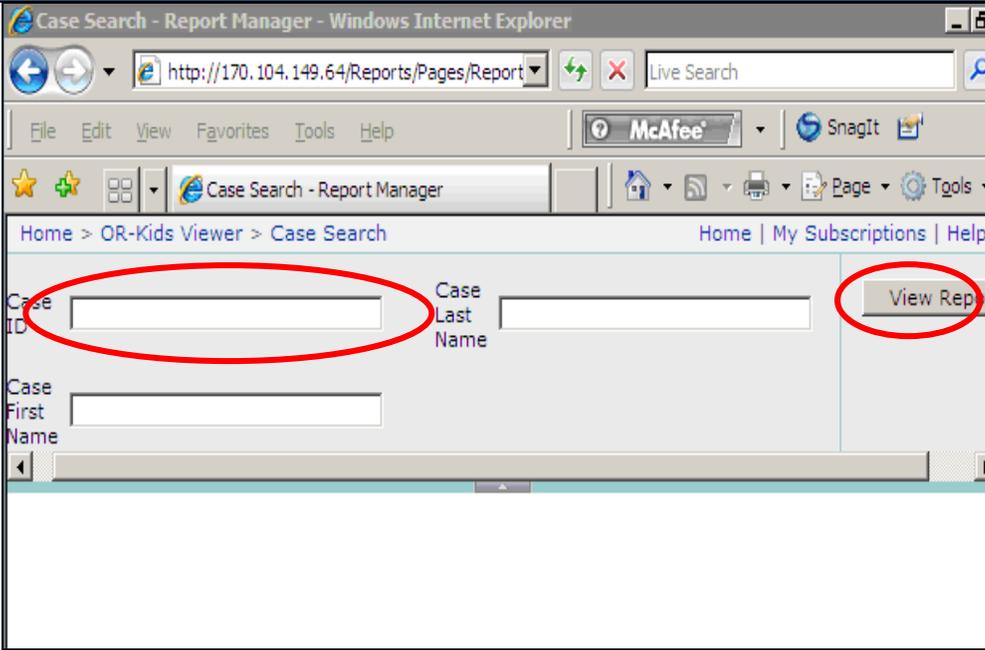
When to Share	What to Share with SSP	Why Information is Needed by SSP	Suggestions for Transferring Information
When DV needs identified by CW	DV resource needs	<ul style="list-style-type: none"> ✓ Provide DV resource as part of Service Coordination ✓ TA-DVS Eligibility (<i>DV grant from self sufficiency</i>) 	<ul style="list-style-type: none"> • Connect with ICC or SSP Point Person
When Action Plan is written	Needs of Family that might be supported by SSP Services (e.g., DV, child care, transportation, employment and training needs)	<p>Service Coordination</p> <ul style="list-style-type: none"> ▪ To prevent duplication of services/payments ▪ To avoid overwhelming the family ▪ Sharing resources 	<ul style="list-style-type: none"> • Invite TANF Worker to Family Meetings (i.e., CSM, FDM, etc) • Share information verbally • Contact Lead Worker • Send info to Email Case Transfer Box (Branch email – Branch # can be found on WEBM-Find and email sent from MS Outlook) <p>Why verbally? <i>Plans don't have all the information SSP needs and much in documents will need to be redacted</i></p>
When Referrals or Payment for Services are made SEE: Alcohol & Drug/Mental Health Addendum (dated 11.25.2013) for sharing protocols	Referrals and Services provided (MH and A&D referrals included)	<p>Service Coordination</p> <ul style="list-style-type: none"> ▪ To prevent duplication of services/payments ▪ To avoid overwhelming the family ▪ Sharing resources 	<ul style="list-style-type: none"> • Invite TANF Worker to Family Meetings (i.e., CSM, FDM, etc) • Share information verbally • Contact Lead Worker • Send info to Email Case Transfer Box (Branch email – Branch # can be found on WEBM-Find and email sent from MS Outlook)

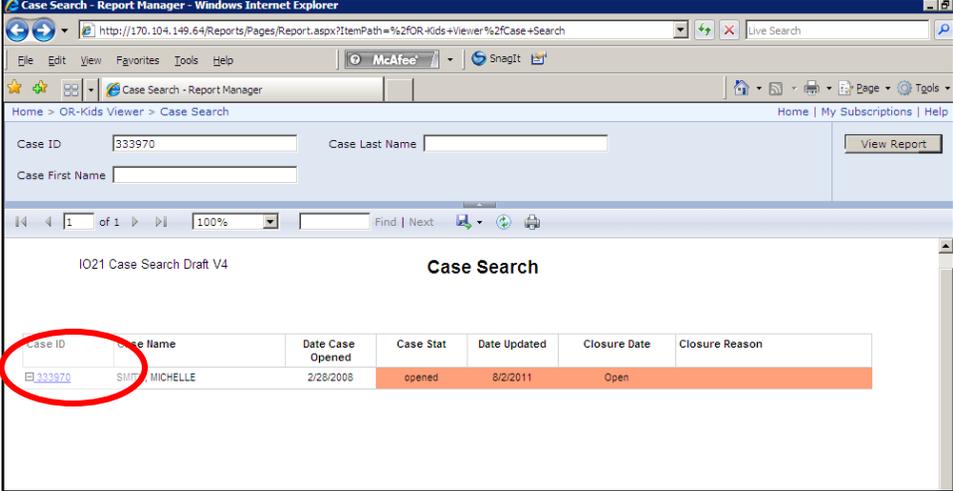
When to Share	What to Share with SSP	Why Information is Needed by SSP	Suggestions for Transferring Information
When child is planned to return home	Date child is planned to return home	<ul style="list-style-type: none"> ✓ Benefit Eligibility ✓ Service Coordination 	<ul style="list-style-type: none"> • Send information to SSP Contact • Send information to Case Transfer Box
When Household Membership is determined or changes	Household Membership, including changes	<ul style="list-style-type: none"> ✓ Benefit Eligibility ✓ Service Coordination 	<ul style="list-style-type: none"> • Send information to SSP Point Person • Send information to Email Case Transfer Box
<p>SNAP and Child Care Programs: Sharing information with SSP when there is a SNAP or Child Care case is allowed and encouraged, but is not an expectation.</p>			

[Search]	Notes
	<p>Find the OR-Kids viewer icon on your Windows desktop and double click it.</p>

[Search]	Notes
	<p>Enter your User Name and Password and click OK to log in.</p>

[Search Using Case Detail]	Notes
 <p>The screenshot shows the OR-Kids Viewer interface in Internet Explorer. The 'Case Search' link is circled in red. The interface includes a search bar and navigation options like 'Home', 'My Subscriptions', and 'Help'.</p>	<p>Notes:</p> <p>You have two options to search:</p> <p>Case Search, which allows you to search by Case ID, Case Last Name, or Case First Name.</p> <p>Or</p> <p>Person Search, which allows you to search by either Case Last Name, Case First Name, Person Prime #, Person SSN, Person Last Name, or Person First Name. You get the same information either way you search.</p> <p>Click on Case Search.</p>

[Search Using Case Detail]	Notes
 <p>The screenshot shows the 'Case Search' page in Internet Explorer. The 'Case ID' text box is circled in red. The 'View Report' button is also circled in red. The page includes input fields for 'Case Last Name' and 'Case First Name'.</p>	<p>Notes:</p> <p>In the appropriate text box, enter Case ID, Case Last Name, or Case First Name.</p> <p>Expand your search results by using the reports wildcard %. Enter the first few letters of the last name and first name then put a % after those letters, this helps find different spellings of possible name matches.</p> <p>Click on the View Report button.</p>

[Search Using Case Detail]	Notes														
 <p>Case Search - Report Manager - Windows Internet Explorer</p> <p>Case ID: 333970 Case Last Name: View Report</p> <p>Case First Name:</p> <p>IO21 Case Search Draft V4</p> <p>Case Search</p> <table border="1"> <thead> <tr> <th>Case ID</th> <th>Case Name</th> <th>Date Case Opened</th> <th>Case Stat</th> <th>Date Updated</th> <th>Closure Date</th> <th>Closure Reason</th> </tr> </thead> <tbody> <tr> <td>333970</td> <td>SMIT, MICHELLE</td> <td>2/28/2008</td> <td>opened</td> <td>8/2/2011</td> <td>Open</td> <td></td> </tr> </tbody> </table>	Case ID	Case Name	Date Case Opened	Case Stat	Date Updated	Closure Date	Closure Reason	333970	SMIT, MICHELLE	2/28/2008	opened	8/2/2011	Open		<p>Any case meeting the criteria you entered will display with the following columns.</p> <ul style="list-style-type: none"> • <i>Case ID</i> • <i>Case Name</i> • <i>Date Case Opened</i> • <i>Case Stat</i> • <i>Date Updated</i> • <i>Closure Date</i> • <i>Closure Reason</i> <p>By clicking on the Case ID hyperlink, you can access additional information.</p>
Case ID	Case Name	Date Case Opened	Case Stat	Date Updated	Closure Date	Closure Reason									
333970	SMIT, MICHELLE	2/28/2008	opened	8/2/2011	Open										

[Search Using Case Detail]

IO21 Case Detail - Report Manager - Windows Internet Explorer

http://170.104.149.64/Reports/Pages/Report.aspx?ItemPath=%2FOR-Kids+Viewer%2FIO21+Case+Detail&ExecId=xfq2vert

IO21 Case Detail Draft v2 IO21 Case Detail Re

Case History

Case ID	Case Name	Case Status	Case Open Date	Last Case Update Date	Closure Date	Closure Reason
333970	SMITH, MICHELLE	opened	2/28/2008	8/2/2011	Open	

Case Address History

Address Start Date	Street Number	Street Name	City	ZIP	State
2/28/2008	34055	STURGEON SE	SCAPPOOSE	97056	OR

Case Participant and Eligibility History

Participant SSN	Case Participant Name	BirthDate	Gender	Race	Relationship Type	Person Where Abouts	Title IV-E Effective Dt	IV-E Status	XIX Effective Dt	XIX Status
XXX-XX-	SMITH, MADELINE	9/14/2006	F	White	Unknown					Unknown
					Child - Biological	In Home	3/3/2008	Ineligible	2/28/2008	Title XIX Eligib
					Child - Biological	In Home	3/3/2008	Ineligible	2/28/2008	Title XIX Eligib
					Child - Biological	In Home	3/3/2008	Ineligible	2/28/2008	Title XIX Eligib
					Self	In Home				Unknown
					Spouse	In Home				Unknown

Notes

Case History Group Box:

- **Case ID:** This is the Case Identification number.
- **Case Name:** This is the Case Name.
- **Case Status:** This is the current case status.
- **Case Open Date:** This is the last date the case was opened.
- **Last Case Updated Date:** This is the last time there was an update to the case.
- **Closure Date:** This is a list of all case closure dates.
- **Closure Reason:** This is a list of all case closure reasons.

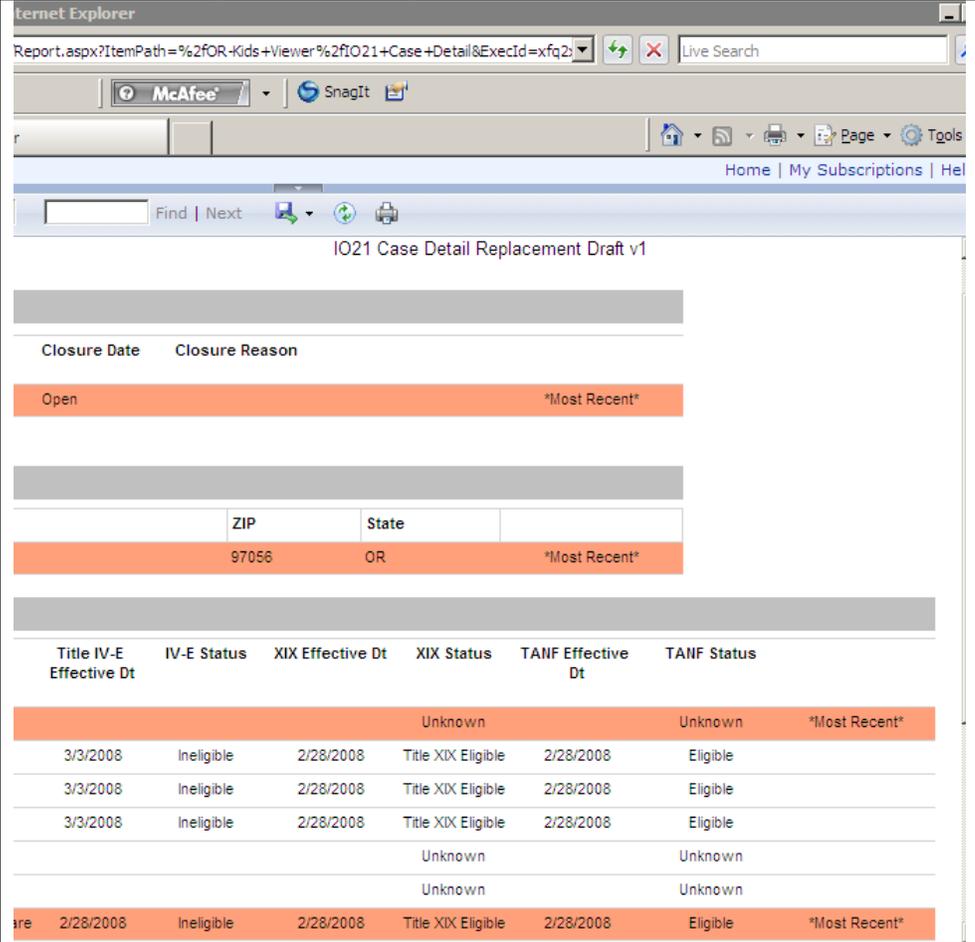
Case Address History Group Box:

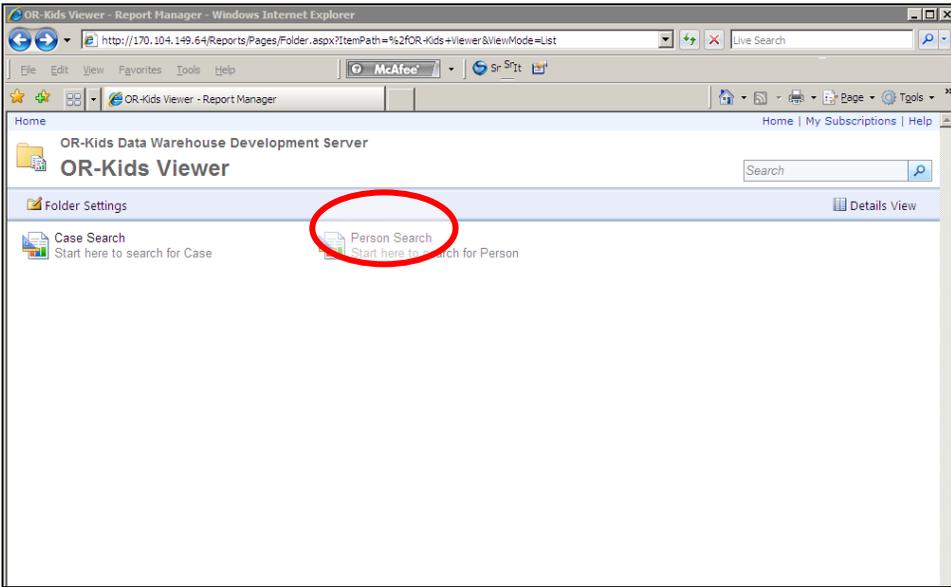
- **Address Start Date:** This is the date an address was effective from.
- **Street Number, Street Name, City, Zip, State:** This is the physical address for the case

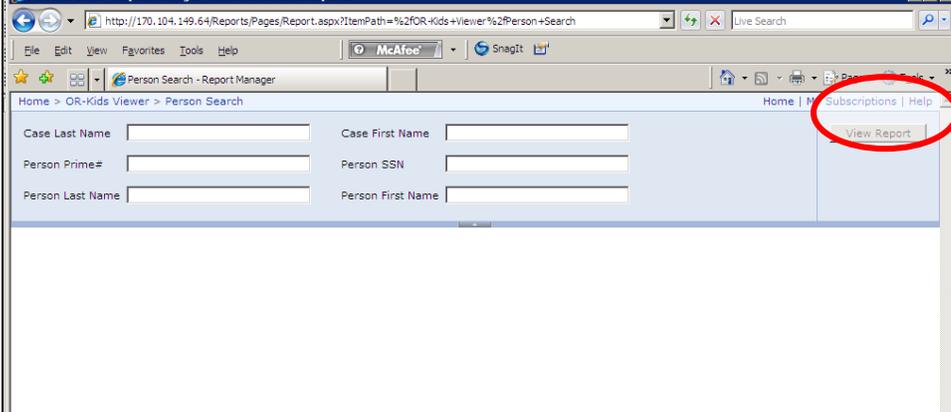
Case Participant and Eligibility History Group Box:

- **Participant SSN:** This is the Social Security Number for the participant.
- **Case Participant Name:** This is a list of all case participants.
- **Birthdate, Gender, Race:** This is information regarding the case participant.
- **Relationship Type:** This is the relation this person has to the Self in the case.
- **Person Where Abouts:** This is the last known location of this person.
- **Title IV-E Effective Dt:** This shows effective date of the Title IV-E eligibility.
- **IV-E Status:** This shows the status of the eligibility for this person.
- **XIX Effective Dt:** This shows the effective date of the Title XIX Eligibility.
- **XIX Status:** This shows the status of the eligibility for this person.

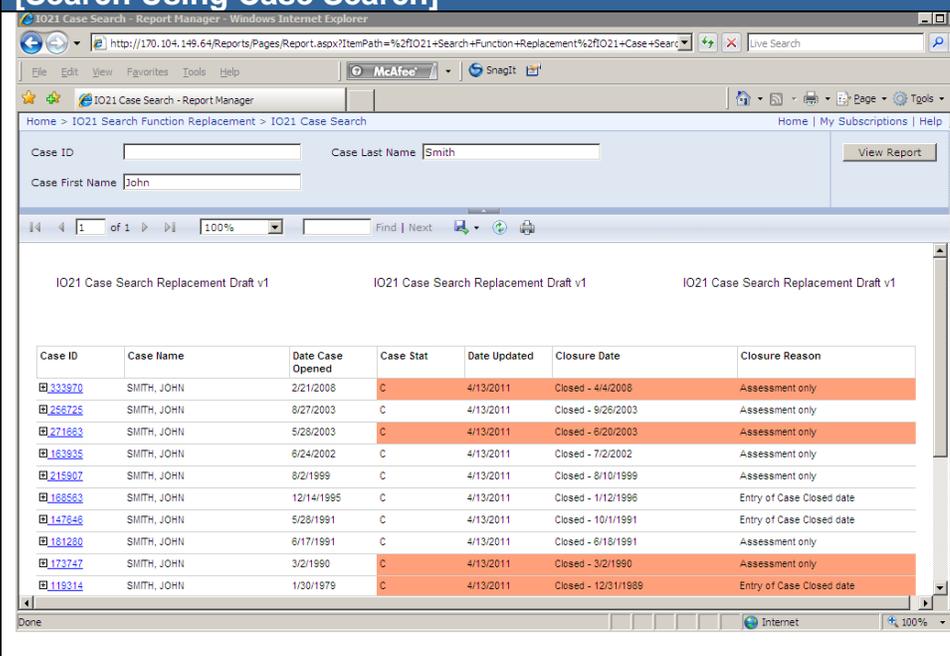
Use your horizontal and vertical scroll

[Search Using Case Detail]	Notes																																																								
 <p>Internet Explorer Report.aspx?ItemPath=%2fOR-Kids+Viewer%2fIO21+Case+Detail&ExecId=xfq2; Live Search</p> <p>McAfee SnagIt</p> <p>Home My Subscriptions Help</p> <p>IO21 Case Detail Replacement Draft v1</p> <table border="1"> <thead> <tr> <th>Closure Date</th> <th>Closure Reason</th> </tr> </thead> <tbody> <tr> <td>Open</td> <td>*Most Recent*</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>ZIP</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>97056</td> <td>OR</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Title IV-E Effective Dt</th> <th>IV-E Status</th> <th>XIX Effective Dt</th> <th>XIX Status</th> <th>TANF Effective Dt</th> <th>TANF Status</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td>Unknown</td> <td></td> <td>Unknown</td> </tr> <tr> <td>3/3/2008</td> <td>Ineligible</td> <td>2/28/2008</td> <td>Title XIX Eligible</td> <td>2/28/2008</td> <td>Eligible</td> </tr> <tr> <td>3/3/2008</td> <td>Ineligible</td> <td>2/28/2008</td> <td>Title XIX Eligible</td> <td>2/28/2008</td> <td>Eligible</td> </tr> <tr> <td>3/3/2008</td> <td>Ineligible</td> <td>2/28/2008</td> <td>Title XIX Eligible</td> <td>2/28/2008</td> <td>Eligible</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Unknown</td> <td></td> <td>Unknown</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Unknown</td> <td></td> <td>Unknown</td> </tr> <tr> <td>ire 2/28/2008</td> <td>Ineligible</td> <td>2/28/2008</td> <td>Title XIX Eligible</td> <td>2/28/2008</td> <td>Eligible</td> </tr> </tbody> </table>	Closure Date	Closure Reason	Open	*Most Recent*	ZIP	State	97056	OR	Title IV-E Effective Dt	IV-E Status	XIX Effective Dt	XIX Status	TANF Effective Dt	TANF Status				Unknown		Unknown	3/3/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible	3/3/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible	3/3/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible				Unknown		Unknown				Unknown		Unknown	ire 2/28/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible	<p>bars to access all the information on this page. We have done this for you.</p> <ul style="list-style-type: none"> <i>TANF Effective Dt: This shows the effective date of the TANF eligibility.</i> <i>TANF Status: This shows the status of the eligibility for this person.</i> <p>Using the Back Arrow Key, return to the Home Page.</p>
Closure Date	Closure Reason																																																								
Open	*Most Recent*																																																								
ZIP	State																																																								
97056	OR																																																								
Title IV-E Effective Dt	IV-E Status	XIX Effective Dt	XIX Status	TANF Effective Dt	TANF Status																																																				
			Unknown		Unknown																																																				
3/3/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible																																																				
3/3/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible																																																				
3/3/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible																																																				
			Unknown		Unknown																																																				
			Unknown		Unknown																																																				
ire 2/28/2008	Ineligible	2/28/2008	Title XIX Eligible	2/28/2008	Eligible																																																				

[Search Using Person Search]	Notes
 <p>The screenshot shows the OR-Kids Viewer interface in a web browser. The page title is 'OR-Kids Viewer'. There are two main search options: 'Case Search' and 'Person Search'. The 'Person Search' link is circled in red. Below the 'Person Search' link, it says 'Start here to search for Person'.</p>	<p><i>If you do not know the Case ID number, click on the Person Search hyperlink.</i></p>

[Search Using Person Search]	Notes
 <p>The screenshot shows the 'Person Search' form. It has several text input fields for search criteria: Case Last Name, Case First Name, Person Prime#, Person SSN, Person Last Name, and Person First Name. There is a 'View Report' button on the right side of the form, which is circled in red.</p>	<p><i>In the appropriate text box, enter either the Case Last Name, Case First Name, Person Prime #, Person SSN, Person Last Name, or Person First Name.</i></p> <p><i>Click the View Reports button.</i></p>

[Search Using Case Search]



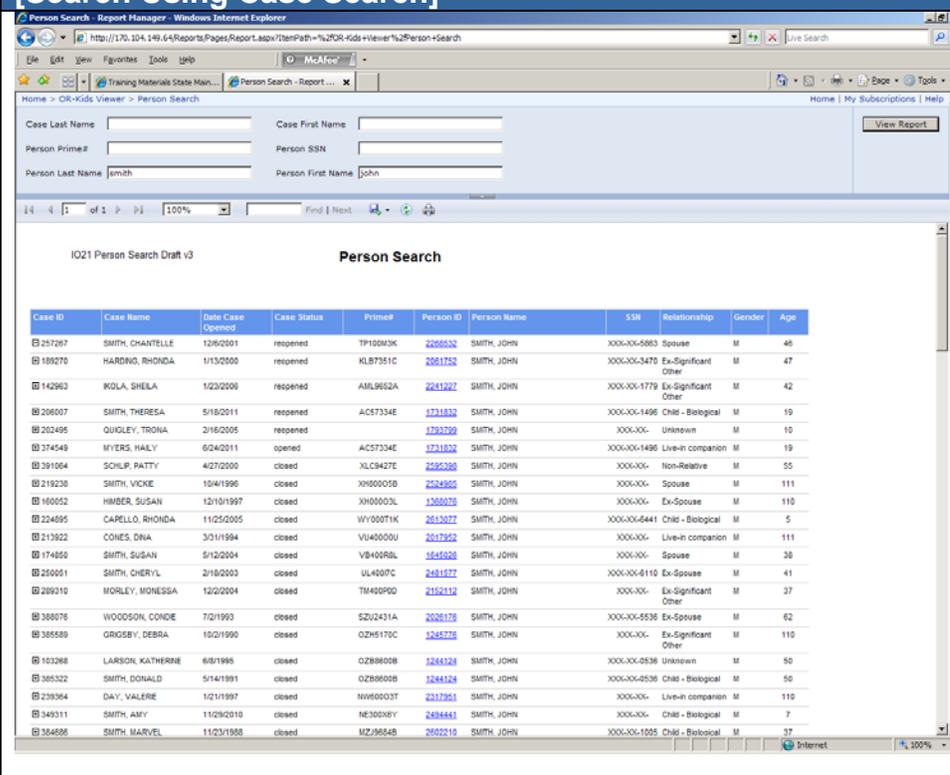
Case ID	Case Name	Date Case Opened	Case Stat	Date Updated	Closure Date	Closure Reason
333870	SMITH, JOHN	2/21/2008	C	4/13/2011	Closed - 4/4/2008	Assessment only
268726	SMITH, JOHN	8/27/2003	C	4/13/2011	Closed - 9/28/2003	Assessment only
271663	SMITH, JOHN	5/28/2003	C	4/13/2011	Closed - 6/20/2003	Assessment only
163826	SMITH, JOHN	8/24/2002	C	4/13/2011	Closed - 7/2/2002	Assessment only
215807	SMITH, JOHN	8/2/1999	C	4/13/2011	Closed - 8/10/1999	Assessment only
168583	SMITH, JOHN	12/14/1995	C	4/13/2011	Closed - 1/12/1996	Entry of Case Closed date
147846	SMITH, JOHN	5/28/1991	C	4/13/2011	Closed - 10/1/1991	Entry of Case Closed date
181280	SMITH, JOHN	6/17/1991	C	4/13/2011	Closed - 6/18/1991	Assessment only
172747	SMITH, JOHN	3/2/1990	C	4/13/2011	Closed - 3/2/1990	Assessment only
118314	SMITH, JOHN	1/30/1979	C	4/13/2011	Closed - 12/31/1989	Entry of Case Closed date

Notes

This is a quick view of all cases with the case name you entered.

To the left of the Case ID number, click on the expando to view any available additional information. (The expando is the little plus (+) symbol next to the case number).

[Search Using Case Search]



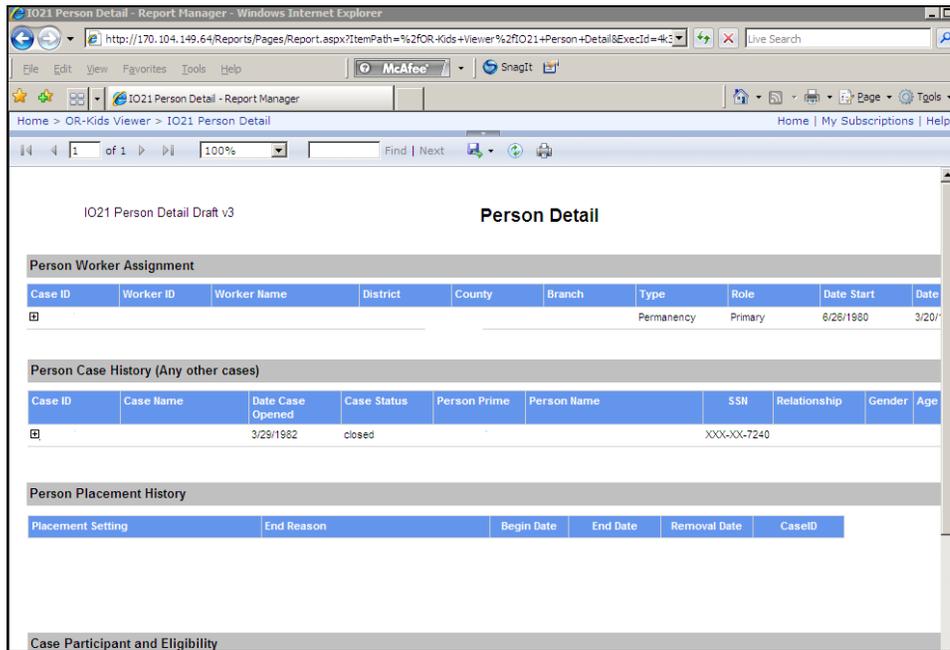
Case ID	Case Name	Date Case Opened	Case Status	Prime#	Person ID	Person Name	SSN	Relationship	Gender	Age
257287	SMITH, CHANTELLE	12/6/2001	reopened	TP100M3K	2260532	SMITH, JOHN	XXX-XX-5863	Spouse	M	46
189270	HARDING, RHONDA	11/3/2000	reopened	KL87351C	2081750	SMITH, JOHN	XXX-XX-3470	Ex-Significant Other	M	47
142963	KOLA, SHEILA	1/23/2006	reopened	AML9652A	2241222	SMITH, JOHN	XXX-XX-1779	Ex-Significant Other	M	42
206007	SMITH, TERESA	5/18/2011	reopened	AC57334E	1731833	SMITH, JOHN	XXX-XX-1496	Child - Biological	M	19
202495	QUIGLEY, TIRONA	2/16/2005	reopened	1793709	SMITH, JOHN	XXX-XX-	Unknown	M	10	
374549	MYERS, HALY	6/24/2011	opened	AC57334E	1731833	SMITH, JOHN	XXX-XX-1496	Live-in companion	M	19
391064	SCHLP, PATTY	4/27/2000	closed	XLC9427E	2382389	SMITH, JOHN	XXX-XX-	Non-Relative	M	55
219230	SMITH, VICKE	10/4/1996	closed	XH80005B	2524905	SMITH, JOHN	XXX-XX-	Spouse	M	111
160052	HIMBER, SUSAN	11/25/2005	closed	XH00003L	1560276	SMITH, JOHN	XXX-XX-	Ex-Spouse	M	110
224895	CARELLO, RHONDA	11/25/2005	closed	WY00071K	2613077	SMITH, JOHN	XXX-XX-6441	Child - Biological	M	5
213922	CONES, DNA	3/31/1994	closed	VU45000J	2017362	SMITH, JOHN	XXX-XX-	Live-in companion	M	111
174850	SMITH, SUSAN	5/12/2004	closed	VB400RBL	1645028	SMITH, JOHN	XXX-XX-	Spouse	M	38
206001	SMITH, CHERYL	2/18/2003	closed	UL4507C	2481877	SMITH, JOHN	XXX-XX-6110	Ex-Spouse	M	41
289910	MORLEY, MONESSA	12/2/2004	closed	TH490P0D	2192132	SMITH, JOHN	XXX-XX-	Ex-Significant Other	M	37
308076	WOODSON, CONDE	7/2/1993	closed	S2Q2431A	2026178	SMITH, JOHN	XXX-XX-5536	Ex-Spouse	M	62
385589	GROGEBY, DEBRA	10/2/1990	closed	OZM5170C	1245778	SMITH, JOHN	XXX-XX-	Ex-Significant Other	M	110
103288	LARSON, KATHERINE	6/8/1995	closed	OZ88808B	1244128	SMITH, JOHN	XXX-XX-0536	Unknown	M	50
385322	SMITH, DONALD	5/14/1991	closed	OZ88808B	1244128	SMITH, JOHN	XXX-XX-0536	Child - Biological	M	50
239364	DAY, VALERIE	12/1/1997	closed	NVR0003T	2337901	SMITH, JOHN	XXX-XX-	Live-in companion	M	110
348311	SMITH, AMY	11/29/2010	closed	NE30036Y	2484441	SMITH, JOHN	XXX-XX-	Child - Biological	M	7
384608	SMITH, MARVEL	11/23/1988	closed	MZ39054B	2602219	SMITH, JOHN	XXX-XX-1005	Child - Biological	M	37

Notes

This view allows you to see all items for Case ID, Case Name, Date Case Opened, Case Status, Prime #, Person ID, Person Name, SSN, Relationship, Gender, and Age.

Click on the Person ID hyperlink to view additional information for this case.

[Search Using Case Search]



IO21 Person Detail Draft v3

Person Detail

Person Worker Assignment

Case ID	Worker ID	Worker Name	District	County	Branch	Type	Role	Date Start	Date End
						Permanency	Primary	6/26/1980	3/20/

Person Case History (Any other cases)

Case ID	Case Name	Date Case Opened	Case Status	Person Prime	Person Name	SSN	Relationship	Gender	Age
		3/29/1982	closed			XXX-XX-7240			

Person Placement History

Placement Setting	End Reason	Begin Date	End Date	Removal Date	CaseID

Case Participant and Eligibility

Notes

Now you are viewing the Person Detail page.

Person Worker Assignment

- Case ID
- Worker ID
- Worker Name
- District, County, Branch
- Type and Role: This is the type of worker assigned to the case and what role they have.
- Date Start/Date End: This is the start and end date for this workers assignment to the case.

Person Case History (Any other cases)

- Case ID
- Case Name
- Date Case Opened
- Case Status:
- Person Prime: This is the persons Prime Number
- Person Name
- SSN
- Relationship: This is the persons relationship to the self in the case.
- Gender
- Age

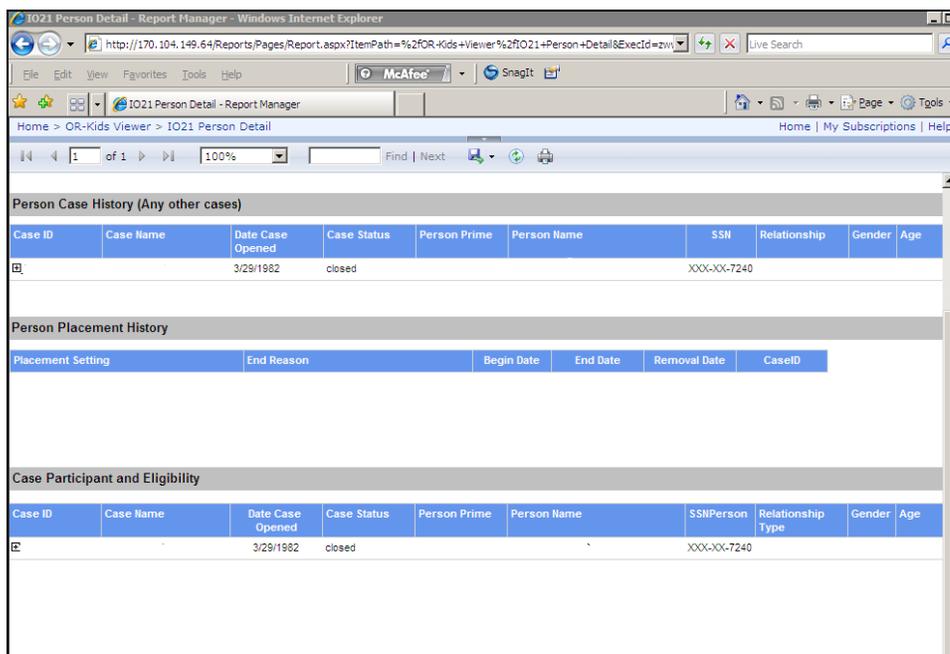
Person Placement History

- Placement Setting
- End Reason
- Begin Date
- End Date
- Removal Date: This is the date the child was removed from the home.
- Case ID

Use your horizontal and vertical scroll bars to access all the information on this page. We have done this for you.

Case Participant and Eligibility

- Case ID
- Case Name
- Date Case Opened
- Case Status
- Person Prime
- Person Name
- SSN Person



IO21 Person Detail - Report Manager - Windows Internet Explorer

http://170.104.149.64/Reports/Pages/Report.aspx?ItemPath=%2FOR-Kids+Viewer%2FO21+Person+Detail&ExecId=zwi

IO21 Person Detail - Report Manager

Home > OR-Kids Viewer > IO21 Person Detail

1 of 1 | 100% | Find | Next

Person Case History (Any other cases)

Case ID	Case Name	Date Case Opened	Case Status	Person Prime	Person Name	SSN	Relationship	Gender	Age
		3/29/1982	closed			XXX-XX-7240			

Person Placement History

Placement Setting	End Reason	Begin Date	End Date	Removal Date	CaseID

Case Participant and Eligibility

Case ID	Case Name	Date Case Opened	Case Status	Person Prime	Person Name	SSN Person	Relationship Type	Gender	Age
		3/29/1982	closed			XXX-XX-7240			

IO21 Person Detail - Report Manager - Windows Internet Explorer

http://170.104.149.64/Reports/Pages/Report.aspx?ItemPath=%2fOR-Kids+Viewer%2fIO21+Person+Detail&ExecId=zv... Live Search

McAfee Snagit

IO21 Person Detail - Report Manager

Home > OR-Kids Viewer > IO21 Person Detail

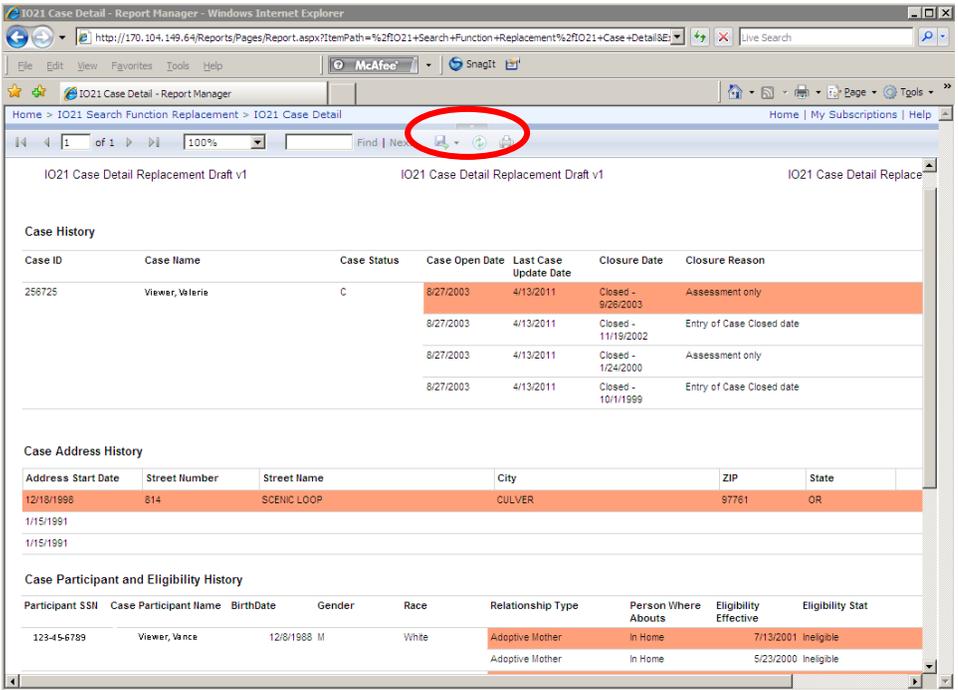
Find | Next

Case Status	Person Prime	Person Name	SSN	Relationship	Gender	Age
			XXX-XX-7240			

on	Begin Date	End Date	Removal Date	CaseID

Case Status	Person Prime	Person Name	SSN/Person	Relationship Type	Gender	Age	Title19 Elig	Title4E Elig	TANF Elig
closed			XXX-XX-7240						Unknown

- Relationship Type
- Gender
- Age
- Title 19 Eligibility
- Title 4E Elig
- TANF Elig

[Search Using Case Search]	Notes																																																																								
 <p>Case History</p> <table border="1"> <thead> <tr> <th>Case ID</th> <th>Case Name</th> <th>Case Status</th> <th>Case Open Date</th> <th>Last Case Update Date</th> <th>Closure Date</th> <th>Closure Reason</th> </tr> </thead> <tbody> <tr> <td rowspan="4">259725</td> <td rowspan="4">Viewer, Valerie</td> <td rowspan="4">C</td> <td>8/27/2003</td> <td>4/13/2011</td> <td>Closed - 9/28/2003</td> <td>Assessment only</td> </tr> <tr> <td>8/27/2003</td> <td>4/13/2011</td> <td>Closed - 11/19/2002</td> <td>Entry of Case Closed date</td> </tr> <tr> <td>8/27/2003</td> <td>4/13/2011</td> <td>Closed - 1/24/2000</td> <td>Assessment only</td> </tr> <tr> <td>8/27/2003</td> <td>4/13/2011</td> <td>Closed - 10/1/1999</td> <td>Entry of Case Closed date</td> </tr> </tbody> </table> <p>Case Address History</p> <table border="1"> <thead> <tr> <th>Address Start Date</th> <th>Street Number</th> <th>Street Name</th> <th>City</th> <th>ZIP</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>12/18/1998</td> <td>814</td> <td>SCENC LOOP</td> <td>CULVER</td> <td>97761</td> <td>OR</td> </tr> <tr> <td>1/15/1991</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>1/15/1991</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Case Participant and Eligibility History</p> <table border="1"> <thead> <tr> <th>Participant SSN</th> <th>Case Participant Name</th> <th>BirthDate</th> <th>Gender</th> <th>Race</th> <th>Relationship Type</th> <th>Person Where Abouts</th> <th>Eligibility Effective</th> <th>Eligibility Stat</th> </tr> </thead> <tbody> <tr> <td rowspan="2">123-45-6789</td> <td rowspan="2">Viewer, Vance</td> <td rowspan="2">12/8/1988</td> <td rowspan="2">M</td> <td rowspan="2">White</td> <td>Adoptive Mother</td> <td>In Home</td> <td>7/13/2001</td> <td>Ineligible</td> </tr> <tr> <td>Adoptive Mother</td> <td>In Home</td> <td>5/23/2000</td> <td>Ineligible</td> </tr> </tbody> </table>	Case ID	Case Name	Case Status	Case Open Date	Last Case Update Date	Closure Date	Closure Reason	259725	Viewer, Valerie	C	8/27/2003	4/13/2011	Closed - 9/28/2003	Assessment only	8/27/2003	4/13/2011	Closed - 11/19/2002	Entry of Case Closed date	8/27/2003	4/13/2011	Closed - 1/24/2000	Assessment only	8/27/2003	4/13/2011	Closed - 10/1/1999	Entry of Case Closed date	Address Start Date	Street Number	Street Name	City	ZIP	State	12/18/1998	814	SCENC LOOP	CULVER	97761	OR	1/15/1991						1/15/1991						Participant SSN	Case Participant Name	BirthDate	Gender	Race	Relationship Type	Person Where Abouts	Eligibility Effective	Eligibility Stat	123-45-6789	Viewer, Vance	12/8/1988	M	White	Adoptive Mother	In Home	7/13/2001	Ineligible	Adoptive Mother	In Home	5/23/2000	Ineligible	<p>At the top of the page in the middle, there are three icons you can use to export, refresh, or print this page. Clicking the export icon will show you the various formats that you can export to.</p>
Case ID	Case Name	Case Status	Case Open Date	Last Case Update Date	Closure Date	Closure Reason																																																																			
259725	Viewer, Valerie	C	8/27/2003	4/13/2011	Closed - 9/28/2003	Assessment only																																																																			
			8/27/2003	4/13/2011	Closed - 11/19/2002	Entry of Case Closed date																																																																			
			8/27/2003	4/13/2011	Closed - 1/24/2000	Assessment only																																																																			
			8/27/2003	4/13/2011	Closed - 10/1/1999	Entry of Case Closed date																																																																			
Address Start Date	Street Number	Street Name	City	ZIP	State																																																																				
12/18/1998	814	SCENC LOOP	CULVER	97761	OR																																																																				
1/15/1991																																																																									
1/15/1991																																																																									
Participant SSN	Case Participant Name	BirthDate	Gender	Race	Relationship Type	Person Where Abouts	Eligibility Effective	Eligibility Stat																																																																	
123-45-6789	Viewer, Vance	12/8/1988	M	White	Adoptive Mother	In Home	7/13/2001	Ineligible																																																																	
					Adoptive Mother	In Home	5/23/2000	Ineligible																																																																	

Topic	How to Get Access to MMIS
Prepared by	DMAP – MMIS Training

Whether you are a new employee seeking first time access to the MMIS, or a current employee wanting to modify or change your MMIS access, the process remains the same. Here are the steps for getting first time access to the MMIS and for updating and modifying your roles in the MMIS:

Step # 1 – Manager Approval

Requests for access to the MMIS must be submitted by the manager, or their designated representative.

Do not send your own IUP 787 form to the Service Desk. The email serves as an electronic signature, so the form must be emailed by the manager or administrative assistant with the manager cc'd on the email. **(It is not necessary to scan a signed form and email as an attachment to the Service Desk)**

Step # 2 – IUP 787 Form/MSD 0787

This is the form that must be used when requesting access to the MMIS. The form has been commonly called the IUP 787 or DHS 787; however, it is officially called the MSD 0787. The form is available on the DHS/OHA Forms Server. (<https://apps.state.or.us/cf1/FORMS/>)

Step # 3 – IUP 787 Form is to be sent to the DHS/OHA Service Desk

Do not send incomplete forms to the Service Desk, especially forms without the official MMIS role designation. (Ex. D_I_P_General_Access) Those forms are returned, delaying access to the MMIS.

You can find the official MMIS role designation and role description by clicking on the link in the IUP 787 form.

Individual user new information							
Name (print):		First	M.I.	Last	User ID:	Effective date:	
Work address:				City:	State:	ZIP code:	
Email address:			Phone:	Extension:	Employee ID number:		
Agency: <input type="checkbox"/> OHA <input type="checkbox"/> DHS		MMIS roles to assign (specify all roles a user should have):					
Program/division: Public Health							

(To look up codes by agency, hold "Ctrl" key and click here.)

You can also find the Agency Role Codes and Definitions on the Form Server site.

Form Nbr	MSWord	Pdf	WordPerfect	Excel	HTML	Powerpoint	Quattro Pro	More Information
MSC 0787	me0787.doc	me0787.pdf						Click here for a list of agency role codes & definitions

If you or your manager needs assistance in determining what roles to request, you can contact Bob Costa (Robert.m.costa@state.or.us) or David Hutchings (david.hutchings@state.or.us) and they can assist you.

Expect to wait up to 5-7 days to get access rights granted. Most requests are fulfilled within 72 hours, but be prepared to wait longer.

UNLOCKING YOUR MMIS ACCOUNT AND RESETTING PASSWORDS

With regard to passwords and your active MMIS account, keep in mind the following:

- 60 Days – Password Expires
- 90 Days – Account is locked due to inactivity
- 120 Days – Account is deactivated and terminated

Once an account is terminated, the entire process must be followed again to again allow access to the MMIS.

You can get your password reset and account unlocked by contacting the Service Desk.

Topic	HZIP and other Tools for County Codes
Prepared by	Coordinated Care Support Unit Division of Medical Assistance Programs/OHA

It is critical that county codes and zip codes be correct for a recipient's address. Incorrect county codes or FIPS codes affect our client's ability to access care. The county codes in MMIS determine what managed care plan someone can be enrolled in and can also cause managed care enrollments to end or change if the FIPS and ZIP are not correct. Below are tools that you can use to ensure the correct FIPS and Zips are entered for the recipients address.

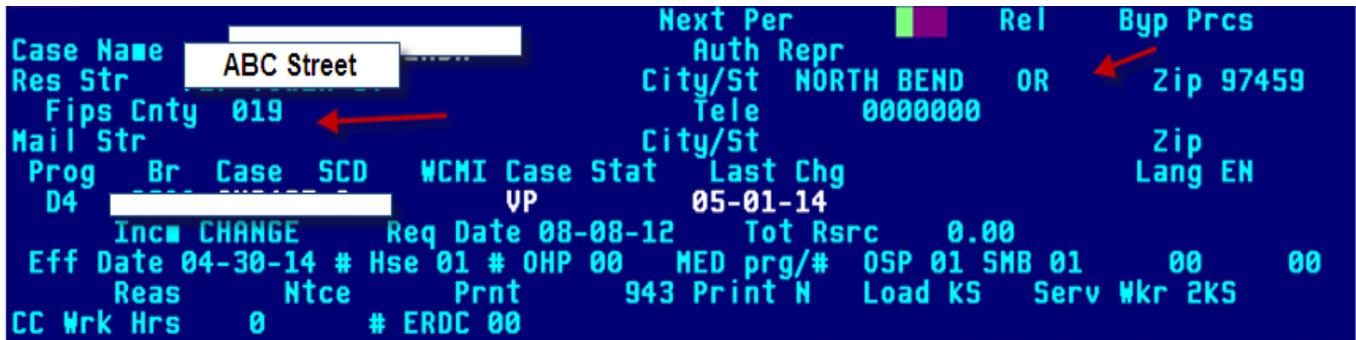
Tools or systems you can use to verify correct FIPS/ZIPS

- HZIP in the DHS main frame
- Postal zip codes/counties lookup
<http://www.oregon-coastdirectory.com/zipcodes/zipcodes.htm>
- DMAP Worker guide for HZIP and managed care information
- USPS.com to verify zip codes (in Quick Tools, use Look up a Zip Code)

Remember that, it's important to use standard abbreviations such as *St* for street or *Ave* for Avenue. When non-standard abbreviations are used, mail may not reach clients.

We have included screen print examples for zip and county codes we have found to be useful to validate a client's address.

Incorrect County Code displayed/entered in the CM system (019 is Douglas County)



Per HZIP in the CM system the **Correct** County Code (011 is for COOS County)

INPUT

Address 1: ABC Street
 Address 2:
 City: NORTH BEND State: OR ZIP: 97459

OUTPUT

Address1:
 Address2:
 City: NORTH BEND State: OR ZIP: 97459-2850 COUNTY CODE: 41011 CRTE: C002

MESSAGES

011 is for COOS

You can view MMIS to see if the correct County code displayed in two or more places:

InterChange
 Government Health Portfolio

Home Claims Managed Care Prior Authorization Provider Recipient Reference TPL CTMS Site EDMS Help

home search information related data add recipient edb search case search other ids search service usage tbq search tbq in

Next search by: Current ID Case ID

Recipient Information

Current ID		Name		Lin
Medicare ID		Prev Name		Bene
SSN		Address		Medicare Co
Gender	FEMALE	Address 2		TBQ
Birth Date		Address 3		Manage
Death Date		City	NORTH BEND	
Age		State	OR	TPL Good
Race		Zip	97459-0000	
Other Race		Phone		Level
Ethnicity	00 Not Hispanic	Phone Extension		Patient L
Citizen	U	Phone Type	No Phone	Medicare
Language	ENG	Add Phone		Case/Certif
Correspondence Language	ENG	Add Phone Type	No Phone	Pregnancy Du
Needs Interpreter	No	Email		Renew
Interpreter Language	UND	Accept Legal Notices Electronically	No	Medical Case Manag
Worker ID		County	011 - Coos	Disease Case Manag
		County Office ID	C	Print

-Mailing Address Data- Select row below to update -or- type data below to add.

Address	Address 2	Address 3	City	State	Mailing Zip	Mailing Zip 4	Residential Zip	Company Name
			NORTH BEND	OR	97459	0000	97459	

Type changes below.

Address*	ABC Street	Mailing Zip*	97459	0000
Address 2		Residential Zip*	97459	
Address 3		Residential County*	Coos	
City*	NORTH BEND	Company Name		
State*	OR			

-Residential Address Data- Select row below to update -or- type data below to add.

*** No rows found ***

Select row above to update -or- click Add button below.

Address	City
---------	------



[Home Page](#) | [Table of Contents](#) | [Advertising Rates](#) | [About Us](#) | [Contact Us](#) | [Legal](#)
[Partners](#) | [Oregon Zip Codes](#) | [Phone Prefixes](#) | [Shopping](#) | [Coupons](#) | [Personals](#)

This page is for informational purposes. Oregon towns and places are alphabetized by name, then county and zip code. For easy navigation, use the lettered row below, to take you to the places that start with that letter. Then use your back button, to return to the top of this page. If you notice any errors, please e-mail me so I can make the appropriate corrections. Thank You

To properly view this page, you must have your monitor resolution set at 600x800.
If you don't, the columns may not line up correctly.

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [Y](#) [Z](#)

A					
NAME OF LOCATION	COUNTY	ZIP CODE	NAME OF LOCATION	COUNTY	ZIP CODE
Acorn Park	Lane	97402	Amity	Yamhill	97101
Ada	Lane	97330	Andrews	Harney	97720
Adams	Umatilla	97810	Anlauf	Douglas	97435
Adel	Lake	97620	Annex	Malheur	83672
Adrian	Malheur	97901	Antelope	Wasco	97001
Agate Beach	Lincoln	97365	Apairy	Columbia	97048

Example, North Bend is Coos County and would be 011 FIPS

NAME OF LOCATION	COUNTY	ZIP CODE	NAME OF LOCATION	COUNTY	ZIP CODE
Narrows	Harney	97721	Newport	Lincoln	97365
Nasheville	Lincoln	97370	Newton Creek	Douglas	97470
Neahkahnie (Beach)	Tillamook	97131	Ninety-one	Clackamas	97013
Nedonna	Tillamook	97136	Nixon	Linn	97348
Needy	Clackamas	97013	Nonpareil	Douglas	97479
Nehalem	Tillamook	97131	North Beach	Lane	97439
Nelscott	Lincoln	97367	North Bend	Coos	97459
Neotsu	Lincoln	97364	North Howell	Marion	97381
Nesika Beach	Curry	97444	North Plains	Washington	97133
Neskowin	Tillamook	97149	North Powder	Union	97867
Netarts	Tillamook	97143	North Santiam	Marion	97325
Newberg	Yamhill	97132	North Side	Marion	97381
New Bridge	Baker	97870	Norway	Coos	97460
New Era	Clackamas	97013	Norwood	Washington	97062
New Idaho	Lake	97630	Noti	Lane	97461
New Idanha	Linn	97350	Nyssa	Malheur	97913
New Pine Creek	Lake	97635			

County FIPS Codes

County Name	FIPS Code
BAKER	001
BENTON	003
CLACKAMAS	005
CLATSOP	007
COLUMBIA	009
COOS	011
CROOK	013
CURRY	015
DESCHUTES	017
DOUGLAS	019
GILLIAM	021
GRANT	023
HARNEY	025
HOOD RIVER	027
JACKSON	029
JEFFERSON	031
JOSEPHINE	033
KLAMATH	035
LAKE	037
LANE	039
LINCOLN	041
LINN	043
MALHEUR	045
MARION	047
MORROW	049
MULTNOMAH	051
POLK	053
SHERMAN	055
TILLAMOOK	057
UMATILLA	059
UNION	061
WALLOWA	063
WASCO	065
WASHINGTON	067
WHEELER	069
YAMHILL	071

Provider CCO Change Request Guide



DIVISION OF MEDICAL ASSISTANCE PROGRAMS

April 2014



Contents

Introduction	3
Purpose	3
References	3
Procedure History	3
Section 1 - Provider CCO Change Process	4
Provider Process	4
Section 2 - Provider CCO Change Process Form	5

Introduction

Purpose

This resource document was developed to provide the Coordinated Care Organization providers with:

- A consistent process for requesting Member CCO Changes when a member is in their offices who have been enrolled in a CCO that does not contract with the provider they are seeing and the member wants to change CCOs so they can continue with that provider
- An approved and consistent form to be used across CCO providers
- A point of contact for submitting Member CCO Change requests

References

Policy/Rule that applies:

OAR: OHP 410-141-3060

OAR: OHP 410-141-3080

Senate Bill 201

42 CFR 438.56,

Procedure History

Version 1.4 Final 04/25/14

Section 1 - Provider CCO Change Process

Provider Process

- Member indicates a desire to change CCOs to continue with the provider they have been seeing
- Provider obtains Member authorization to change CCOs
 - Authorization from the Member can be either:
 - Member signature on the *Provider CCO Change Request* form
 - Documented permission by phone
 - including date and time of conversation
- Member signs *Provider CCO Change Request* form
 - or Provider completes the phone authorization section
- Form is sent to Provider Services Staff at Oregon Health Authority by either:
 - Fax to: **503-947-1177**
 - Email to: **CCO.ChangeRequest@state.or.us**
 - For signed forms please scan and attach
- Provider Services Staff makes the request through CES email at:
 - CES.DMAP@state.or.us
- Enrollment is reviewed, if approved, plan is changed per
 - OAR: OHP 410-141-3060 (19) effective:
 - (a) On or before Wednesday, the date of enrollment shall be the following Monday; or
 - (b) After Wednesday, the date of enrollment shall be one week from the following Monday.
- OHA contacts Member and advises of change and Effective Date

Section 2 - Provider CCO Change Process Form

Client Members should be aware of the Enrollment/Disenrollment Rules below

Disenrollment from Coordinated Care Organizations OAR: 410-141-3080

(6) In accordance with 42 CFR 438.56, the Authority, CCO and DCO shall honor a member or Representative request for disenrollment for the following:

(a) Without cause:

(A) Newly eligible clients may change their CCO or DCO assignment within 90 days following the date of initial enrollment. The effective date of disenrollment shall be the first of the month following the Division's approval of disenrollment:

(B) At least once every 12 months:

(C) Existing members may change their CCO or DCO assignment within 30 days of the Authority's automatic assignment or re-enrollment in a CCO or DCO;

(D) Effective retroactively on or after September 1, 2011 and in accordance with SB 201, members may disenroll from the CCO or DCO during their redetermination (enrollment period), or one additional time during their enrollment period based on the members choice and with Authority approval. The disenrollment shall be considered "recipient choice."

Enrollment Requirements in a CCO OAR 410-141-3060

(18) The Authority may exempt clients or temporarily exempt clients for other just causes as determined by the Authority through medical review. The Authority may set an exemption period on a case-by-case basis. (Continuity of Care Request from Provider)

The full rule can be viewed at:

http://arcweb.sos.state.or.us/pages/rules/oars_400/oar_410/410_141_3000-3430.html

Note: If a member changes CCOs and has a Prior Authorization, the member may need to see a primary care provider in the new CCO to be evaluated and a new Prior Authorization may be needed. Your new CCO can assist you with this.



Provider CCO Change Request form

Member Name:			
Member Prime ID Number:		Member DOB:	
Member Address:	Street:		
	City:	Zip:	
Member Phone:	Home/Office	Cell	
Provider's Name:		Provider's Phone:	
Current CCO:			
Requested CCO:			
Notes:			
<p>Member or Guardian, complete this section if you are requesting a change in your CCO enrollment so you can continue to see your chosen provider. if under age 19, provide guardian's signature and date. If you have questions, contact Client Services Unit at 1-800-273-0557.</p> <p>Member name (print):</p> <p>Member signature: _____ Date: _____</p>			
<p>Provider complete this section if Member requested change by phone</p> <p>Date: _____ Time: _____</p>			
<p>Submit this form via:</p> <ul style="list-style-type: none"> • FAX: Provider Services Staff at: 503-947-1177 • Email to: CCO.ChangeRequest@state.or.us <ul style="list-style-type: none"> ▪ Please scan and attach signed forms 			<p>FAX or Email Date:</p>

SNAP QC ERROR TRENDS
Reviews of Negative SNAP Determinations
Statewide Findings
FFY 2014 (Oct - Feb. 2014)

Total negative action cases reviewed:	332	Cases in error:	57
Total case reviews completed:	321	Error rate:	17.76%

FFY 2014 National Negative Error rate: 25.47% (through Nov 2013)

Top Error Causes and Preventative Tips

1. Untimely processing: 35 cases (61.4% of the cases cited)

- If a household fails to complete the application process (no interview or failure to provide requested verification) deny the application on the 30th day following the filing date.
- Whenever possible put the SNAP case into PE status with the correct filing date, a language code and address so the system will deny timely with appropriate notice.
- If an 852 is incomplete send the 487 before the case suspends.
- Process all 852s before the case suspends regardless of where it is submitted.
- Do not pend an 852 for information not required to be reported on the 852.
- Review correct coding of the 852 at your team meetings.

2. Policy Misapplied: 7 cases (12.28% of the cases cited)

- Be sure the household is informed in writing (to the correct address) what is needed to complete the application process.
- Before closing a case because of returned mail be sure to look in the file (electronic and paper) to make sure the mail was sent to the address the household reported.
- Do not deny for failure to provide if the agency has gathered the required items through other means.
- Be sure computer coding of the Rpt Exp field is updated when processing a recertification.
- Code the "NED" HH type on cases where all adults are either disabled or elderly and there is no earned income on the case.
- Review NED requirements and coding at team meetings.

3. Invalid Notices: 15 cases (26.31% of the cases cited)

- Maintain files, including the application, pending items and notices.
- Immediately update addresses on FCAS whenever a new address is reported.
- When processing a recert review the address to ensure it matches what was reported on the application.
- When processing a denial for over income be sure to code the correct income on FCAS.
- If sending a paper notice (not through NOTM) ensure a copy is saved for the file.

** Some cases had more than one error cause. Some error causes are not listed above because only one case was cited for that particular error cause.*

ERDC QC ERROR DATA AND ANALYSIS

Reviews of Active ERDC Determinations Statewide

FFY 2014 (December 2013-February 2014)

Sample Month	Assigned	Completed	Errors	Drops	Dollar Amount	Error Rate
December	36	36	10	0	\$1994.36	27.7%
January	36	36	8	0	\$403.89	22.2%
February	36	34	4	1	\$387.25	11.7%
TOTAL	108	106	22	1	\$2785.50	20.7%

Incorrect Income Calculation	10 cases
Insufficient/Missing Documentation	7 cases
Missing Application	1 case
Income from a Separate Source Excluded	2 cases
Incorrect Hours Anticipated	1 case
Acting on Reported Changes	1 case

11 Technical Errors - child care hours incorrectly anticipated which did not cause an improper payment

TANF QC ERROR DATA AND ANALYSIS

Reviews of Active TANF Determinations Statewide

FFY 2014 (December 2013-February 2014)

Sample month	Assigned	Completed	Errors	Drops	Dollar Amount	Error Rate
December	38	34	22	4	\$5,699.00	64.7%
January	37	35	15	2	\$2,286.00	42.8%
February	40	35	14	5	\$3,296.00	40.0%
TOTAL	115	104	55	9	\$11,281.00	52.8%

7823A	16 cases
Start Date	7 cases
Incorrect Income	7 cases
Time Limits Not Verified	5 cases
Job Separation	4 cases
Over Income	3 cases
Duplicate Benefits	2 cases