Oregon
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Department of Human Services
House Bill 2219 Report to the Legislature
August 15, 2016

The Department of Human Services (DHS) is submitting this report to the Legislature as a requirement of House Bill 2219, enacted in the 2015 Regular Legislative Session.

Background

House Bill 2219 directed DHS to convene a work group with staff from human service agencies, including: the Housing and Community Services Department, the Oregon Health Authority, the Department of Education, the Employment Department, the Office of Child Care (inside the Early Learning Division), and the Higher Education Coordinating Commission, as well as, the State Chief Information Officer and other individuals who the department deems necessary. The work group was to study how to create a consolidated application process for residents of the state to apply for and obtain assistance in accessing food, housing, medical care, education, employment services, child care and other social services. The work group was tasked with developing and submitting a recommendation to the Legislative Assembly by September 15, 2016.

Also in the 2016 Legislative Session, the Department of Human Services gained legislative approval and funding for the DHS Integrated Eligibility Project. This project builds upon the established foundation of Oregon's ONE eligibility determination system to incorporate Aging and People with Disabilities financial eligibility for Medicaid, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), and Employment Related Day Care (ERDC). Once the project is completed in December 2018, Oregonians will be able to complete a single application to determine their eligibility for all of these programs which require separate applications and processes today.

Work group membership

Leadership from the Department of Human Services issued letters of invitation to agency heads of human service agencies identified in the House Bill to participate in the work group. The

DHS Office of Self-Sufficiency Programs similarly contacted several stakeholder groups with an invitation to participate.

The current membership of the HB 2219 work group is captured in the table below.

Representative	Organization
Ethan Benatan	Office of the State Chief Information Officer
Bob Brew	Higher Education Coordinating Commission
Varsha Chauhan	Oregon Health Authority
Joyce Dougherty	Oregon Department of Education
Chloe Eberhardt	Partners for Hunger Free Oregon
Kim Fredlund	Oregon Department of Human Services Office of Self Sufficiency Programs
Phillip Kennedy-Wong	Oregon Food Bank
Annie Kirschner	Partners for Hunger Free Oregon
Alexander LaVake	Outside In
Chelsea Louie	Oregon Department of Human Services District 5 Self-Sufficiency
Steve Manela	Lane County Human Services
Sarah Miller	Oregon Department of Human Services Director's Office
Matt Newell-Ching	Partners for Hunger Free Oregon
Jim Pfarrar	Oregon Department of Employment
Melody Riley	Department of Human Services/Oregon Health Authority Office of Information Services
Jean Vinson	Relief Nursery Inc.
Joel Robe	Office of Child Care
Tim Zimmer	Oregon Housing and Community Services

Summary of Meetings

Five meetings were held, beginning in February 2016, where agency representatives received a pre-assignment to complete a program overview template with information for each human service program that may be impacted by HB 2219. During the February meeting, representatives gave an overview of their program templates and responded to questions from other work group members to gain a better understanding of the suite of human service programs and how they are accessed. *See Appendix A for all program overviews that were submitted.*

Agency	Program Title
Department of Human Services	Oregon Supplemental Income Program Medical (OSIPM)
	Qualified Medicare Beneficiary Program (QMB)
	Oregon Project Independence (OPI)
	Self-Sufficiency – TANF (Temporary Assistance to Needy Families)
	Refugee Program
	Supplemental Nutrition Assistance Program (SNAP)
	Employment Related Day Care (ERDC)
Higher Education Coordinating Commission – Office of Student Access and Completion	Oregon Opportunity Grant
	Oregon Promise
Oregon Department of Education	Child Nutrition Programs
	Early Learning Division
Oregon Health Authority	Oregon Health Plan (MAGI Medicaid /CHIP and non-MAGI)
Oregon Housing & Community Services (OHCS)	Bonneville Power Administration – Low-income Energy Efficiency
	US DOE Weatherization Assistance Program
	Energy Conservation Helping Oregonians (ECHO)
	Emergency Housing Assistance Program (EHA), EHA DRF, EHA DRF Veterans
	Emergency Solutions Grant (ESG)
	Housing Stabilization Program (HSP)
	Local Innovation and Fast Track (LIFT) Housing Programs
	Low Income Home Energy Assistance Program (LIHEAP)
	Oregon Energy Assistance Program (OEAP)
	Oregon Homeownership Stabilization Initiative (OHSI)
	State Homeless Assistance Program (SHAP)
Oregon Housing and Community Services (OHCS), partnering with Oregon Health Authority (OHA)	Housing for Mental Health

The March 2016 workgroup meeting was extended and dedicated to hearing from staff whom assist Oregonians in applying for human service programs with a focus on challenges to the application process. After the initial discussion, representatives suggested soliciting feedback from a broader group of agencies and staff to gain a more comprehensive list of challenges and

improvement ideas. A survey was created and distributed to work group representatives with instruction to complete it and distribute to other community stakeholders who assist Oregonians in applying for human service programs. *See Appendix B for survey results and analysis.*

In May 2016, the survey results were distributed to work group representatives and used to begin conversation about recommendations. The work group received the 398 raw data comments from survey question 3 and requested additional analysis be done on the themes for recommended changes to the application process. Work group staff committed to completing further analysis on the free text comments and distributing to the group in June. The work group requested a list of the top themes and recommendations for the next meeting in order to narrow down their top selections for the legislative report.

The work group received the draft report and recommendations through email in June and discussed their initial feedback over a conference call. The group was in support of the draft recommendations and also requested that reference to making the language on applications and forms less confusing be incorporated.

In July 2016, the last work group meeting was held to finalize their recommendations and report.

Recommendations

Recommendation 1: Develop a single application for financial eligibility for the Department of Human Services (DHS) and Oregon Health Authority (OHA) programs. Convene a cross organization recommending body to develop criteria for the sequence and addition of other agency programs.

Consolidating the application process for multiple programs (Medicaid, SNAP, TANF and ERDC) among two large state agencies is an incremental step in the vision towards a single application for all health and human service programs. Incremental implementation of additional programs allows for agency staff to orient themselves to the new technology and mature associated business processes while minimizing potential delays for clients in receiving benefits they are eligible for.

Recommendation 2: The HB2219 work group recommends that DHS and OHA take the opportunity with the Integrated Eligibility Project to review and revise the application language. Application assistors have provided feedback that current application language can be confusing and potentially trigger trauma for applicants. A consumer focus group about application

language may help DHS and OHA make revisions as appropriate and HB2219 workgroup agencies will assist with identifying consumers to participate in such a focus group.

Recommendation 3: Utilize the HB2219 work group to research the health and human services program screening tool(s) currently being used in Oregon and explore their functionality, accuracy, maintenance and usage.

Staff who assist Oregonians in applying for benefits shared that one of the biggest barriers to the application process is not understanding all of the programs that are available and which programs applicants may be eligible for.

Oregon Helps is an online screening tool that an Oregonian can anonymously enter their household and income information in to receive a list of programs they may potentially be eligible for. Currently Oregon Helps screens for ten programs and refers the Oregonian to 211 Info for information on how to apply. Oregon Helps and the HB2219 work group would like to partner on updating program information, adding additional programs as well as linking to the appropriate agency/program website for information on the application process.

Recommendation 4: Continue the HB2219 work group to research and explore the possibility of sharing basic applicant information across programs/agencies, when applicable, to reduce duplication and enhance services for Oregonians.

The HB2219 work group recommends beginning with the agencies specified in the bill to identify 1) what information can currently be shared, with respect to privacy, confidentiality and consent laws; 2) additional information that would be most helpful to share in order to administer public assistance programs. The work group would then identify what level of consent or access agreements are needed to move forward.

The Department of Human Services currently shares applicant information with Oregon Department of Veterans Affairs (ODVA) for the purpose of connecting veterans and their families to local resources. The Department of Education also receives recipient information from DHS to determine eligibility for the Free and Reduced Lunch Program. DHS is also currently exploring the capability of sending electronic applicant referrals to the Women, Infant and Children's (WIC) Program.

Additional information may be provided upon request;

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Appendix A – Human Service Program Overviews

Criteria	Agency Program Response
Agency name	Higher Education Coordinating Commission – Office of Student Access and Completion
Program name	Oregon Opportunity Grant
Description of services offered	College/University need-based financial aid
Description of caseload associated with program	Approx 35,000 students per year
Description of how customers access program	Apply through Free Application for Federal Student Aid (FAFSA)
Description of how referrals "to" the program occur	Self-referred
Description of what referrals "from" the program occur & how	Grants awarded through the program are paid to the college or university the student is attending.
Description of any automated system to support program	Interface with federal government system for application downloads. Home-built software to determine qualified recipients and process awards.
Biennial budget for services	$145 million
Funding source for budget	General Fund

Criteria	Agency Program Response
Agency name	Department of Human Service
Program name	Self-Sufficiency – TANF (Temporary Assistance to Needy Families)
Description of services offered	Cash assistance to low income families; job preparation and job search activities; cash benefits to victims of domestic violence; case management; support service payments; referrals to other assistance agencies.
Description of caseload associated with program	As of January 2016, there were 24,163 open cases.
Description of how customers access program	Customers can request services with a completed application; unless certain hardship criteria are met, individuals are required to complete a face to face eligibility intake.
Description of how referrals "to" the program occur	TANF is a safety net program and customers here about the services when they are engaged with other agencies including housing, the hospital, schools, and other Self-Sufficiency programs.
Description of what referrals "from" the program occur & how	TANF staff make referrals to housing assistance agencies, mental health providers, drug and alcohol treatment providers, public health departments, domestic violence providers and shelters; most referrals are made by providing contact information to the individual; some referrals are made to contracted service providers for employment readiness and work search activities.
Description of any automated system to support program	There is currently a process and system in place for individuals who have requested other Self-Sufficiency program services to request TANF benefits; there is a supplemental form that can be used to prevent duplicate information from being reported.
Biennial budget for services	$262,276,880
Funding source for budget	A combination of federal TANF black grant, state dollars that can be claimed as maintenance of effort (MOE) dollars, and state dollars that cannot be claims as MOE

Criteria	Agency Program Response
Agency name	Higher Education Coordinating Commission – Office of Student Access and Completion
Program name	Oregon Promise
Description of services offered	College/University need-based financial aid
Description of caseload associated with program	Approx 7,000 students per year
Description of how customers access program	Apply through HECC-OSAC website (OregonStudentAid.gov)
Description of how referrals "to" the program occur	Self-referred
Description of what referrals "from" the program occur & how	Grants awarded through the program are paid to the community college the student is attending.
Description of any automated system to support program	Home-built software is used to determine qualified recipients and process awards.
Biennial budget for services	$10 million (first year). $40 million at build-out.
Funding source for budget	General Fund

Criteria	Agency Program Response
Agency name	**Oregon Health Authority**
Program name	**Oregon Health Plan (MAGI Medicaid /CHIP and non-MAGI)**
Description of services offered	**Medical Programs:** **OHP Adult (MAGI):** OHP Adult is a MAGI program for adults 19 and over and under age 65, and under 138% of the FPL (this includes the 5% disregard). **OHP Child (MAGI):** OHP Child is for children under the age of 19 and also under the FPL of 138% (this includes the 5% disregard). Children age 0-1 year (non-AENs) must be under the FPL of 185%. **Assumed Eligible Newborns (AEN, MAGI):** Newborns born to a mother with current Medicaid medical. They are assumed eligible at birth, and have protected benefits until their first birthday (only end if they move out of Oregon, and can be restarted if they move back). They will receive benefits under the OHP Child program. **OHP for Pregnant Woman (MAGI0** OHP for Pregnant Woman are for pregnant women under the FPL of 185% Once a woman has OHP for Pregnant Woman benefits, they are protected until the pregnancy ends including sixty days after (to allow for due process). Pregnant women can choose to be on an Open Card so they can have access to a Midwife or Doula, otherwise they will be enrolled into a CCO. They can also have other primary insurance, which will make OHP a secondary insurance. **OHP for Parent or Other Caretaker Relatives (MAGI):** Parent or Other Caretaker Relative medical is for parents and other caretaker relatives that have a dependent child in their home and are under the income standard described in OAR 410-200-0315 **Extended Medical, non-MAGI):** Extended Medical is for recipients of the Parent or Other Caretaker Relatives program clients that go over income due to an increase in earnings or spousal support and are not eligible for any other OHP program. Clients that go over income will have protected eligibility for four or 12 months after the income chang, the time period depends on whether they went over-income based on spousal (four months) or earned income (12 months). **CHIP (MAGI):** CHIP is a federally funded medical program for children 0-19 that are over the FPL limit for OHP Child. They are over the FPL of 138% and under 300%. CHIP beneficiaries cannot have other medical insurance that meets the minimum essential coverage. **Hospital Presumptive Medical:** Presumptive Medical is OHP Plus benefits determined by hospitals. It has all of the same medical benefits, however does not cover Labor and Delivery of pregnant women. Clients must be US Citizens and Oregon residents, there are no CAWEM benefits issued through Hospital Presumptive. Hospital Presumptive can be used for urgent medical needs, or as a means to access medical quickly as it must be

processed by OHP within five days of receiving approval from the hospital. After clients start Hospital Presumptive, they will have to submit a full application within 45 days to keep their OHP benefits.

Breast and Cervical Cancer (technically Non-MAGI): Medical for uninsured women screened by the Centers for Disease Control and Prevention's National Breast and Cervical Cancer Early Detection Program who are determined to be in need of treatment for breast or cervical cancer, including precancerous conditions. These clients do not meet the eligibility requirements for any other OHP program, are under age 65, and are under250% of the FPL.

Substitute Care: Medical for individuals under age 21 in Behavioral Rehabilitation Services (BRS) or Psychiatric Residential Treatment Facility (PRTF).

Refugee Medical (technically Non-MAGI): Once a refugee is granted permission to come to the U.S., and has been granted a legal immigration status, a host of community organizations and state agencies take over the resettlement and acculturation process. These clients are first considered for MAGI Medicaid/CHIP and if not eligible for OHP Plus medical, the federal Office of Refugee Resettlement provides up to eight months of cash and medical assistance to newly arriving refugees. These federal funds are administered through the states. During these eight months, refugees have OHP Plus medical.

Coverage Plans:

OHP Plus: OHP plus is the most comprehensive benefit. It covers most health care services. Services to improve vision (e.g., glasses) are covered for children under age 19 and pregnant adults; for non-pregnant adults, vision services are covered only for specific medical conditions. Adults and children (with the exception of CHIP recipients) can have other insurance and use OHP as a secondary insurance, which means they will have an Open Card and no Coordinated Care Organization. Clients without other insurance will automatically be enrolled into a CCO unless they are Alaska Native/Native American and choose to have an Open Card.

OHP Plus Supplemental: OHP Plus Supplemental benefits are for pregnant women. These benefits are the same as OHP Plus benefits, however include some vision and prenatal care. The FPL is higher, 185%, for pregnant women. Once a woman has OHP Plus Supplemental benefits, they are protected until the pregnancy ends including sixty days after (to allow for due process). Pregnant women can choose to be on an Open Card so they can have access to a Midwife or Doula, otherwise they will be enrolled into a CCO. They can also have other primary insurance, which will make OHP a secondary insurance.

OHP with Limited Drug (BMD or BMM): This is for clients that are eligible for Medicaid and Medicare Part D. It covers the same benefits as OHP Plus, except it does not cover drugs that Medicare Part D should cover.

CAWEM Plus: The CAWEM Plus medical benefits package is a slightly reduced version of the OHP Plus benefit package and will provide prenatal Medicaid serviced to pregnant CAWEM women. Services that are not covered:

- Death with dignity

	• Sterilization • Therapeutic abortion • Hospice **CAWEM Adult:** To qualify for the CAWEM benefit package, a person must meet all the financial and nonfinancial eligibility requirements of another medical assistance program, except the citizen/alien status requirements. Applicants who are undocumented (do not have a legal immigration status) are not required to provide proof of their citizenship or alien status. The CAWEM benefit package covers emergency medical services only. This means the client requires immediate medical treatment due to the sudden onset of a medical condition, and the absence of medical treatment could reasonably be expected to result in any of the following: • Placing the client's health in serious jeopardy • Serious impairment to bodily function • Serious dysfunction of any organ or body part **CAWEM Child:** Emergency only benefits for undocumented children, these are the same benefits as CAWEM adult.
Description of caseload associated with program	According to: **Medical Assistance Programs Governor's Budget 2015–2017** Pregnant Women: 18,656 Infants: 28,581 CHIP: 68,295 Medicaid Children (to 133% of FPL): 320,356 ACA Adults (under 133% of FPL): 388,674 Parent and Caretaker Relatives: 53,097 Breast and Cervical Cancer Treatment Program: 623
Description of how customers access program	**Paper Application by Mail/Fax –** Clients can go online and print an application that they either mail or fax in. This is scanned by IRMS and uploaded to an applicant in the ONE system. **Applicant Portal –**Clients can sign in online and apply for MAGI Benefits. Phased roll-out beginning February 6, 2016. **Phone (Only) –** Clients with urgent needs can call in and staff process the application

	directly into the ONE system to determine eligibility. **Department of Corrections –** As inmates are released, jails/prisons help them apply for OHP benefits. If an inmate is incarcerated and hospitalized, the facility sends a 7100 form to OHP with the dates of service. A specialized DOC team processes these and only add the dates of service for the hospitalization (directly in MMIS through Client Maintenance Unit-CMU). **State Hospital –** Upon release from State Hospital, an application is sent to OHP for benefits and processed by specialized team. **Hospital (Presumptive Medical) –** Any US Citizen/Oregon resident can go into a hospital and ask for Hospital Presumptive. Hospitals have fewer eligibility rules and determine eligibility locally for the client. The approval is sent within five days to OHP, and the Hospital Presumptive team has five days to process the approval. The client then must submit a full OHP application within 45 days to keep benefits.
Description of how referrals "to" the program occur	**APD Referral** for clients that are no longer eligible for Non-MAGI programs. Usually sent by e-mail from branches, might help clients fax in a full OHP application. **APD/AAA/SSP** field office walk-in visits from clients. Provide clients with an application, help clients fax in an application, or provide OHP phone number. **FFM (Federally Facilitated Market Place)/Oregon.gov or Healthcare.gov:** Routes applicants to OHP if they fall in OHP income range. **Hospitals:** Hospitals can inform clients of OHP, provide a "Hospital Hold" for a date of request, or offer to determine eligibility through Hospital Presumptive. **Providers:** Providers can provide information to clients about OHP benefits. Clients needing Breast and Cervical Cancer benefits will need provider verification sent. **State Hospital:** Route applications to OHP for patients being released. **Jails/Prisons/Other Facilities:** Route applications to OHP for inmates being released, or hospitalized inmates. **Refugee Medical:** Clients are informed of Refugee Medical during the process of becoming a legal immigrant.
Description of what referrals "from" the program occur & how	**To FFM:** Clients over income for OHP will be referred to the FFM for Health Exchange Benefits. **The ONE System:** The ONE system triggers a task to refer clients for APD (Non-MAGI) medical if: • Client is blind or disabled • Client is 65 years of age or older

	• Client is receiving SSI • Client is receiving any Part of Medicare or a Medicare Supplement • Client is receiving or requesting long-term care services (a process for DD service requests is currently being developed) • A client is denied or terminated MAGI and is receiving SSDI. These tasks are manually sorted by 5503 (OHP) workers and sent to APD inboxes in the ONE system. APD staff then look at the referrals, determine eligibility (through current manual processes), and send the determination back through the system. **Over the Phone needs:** If a client has other needs, or wishes to apply for other State programs, OHP workers will refer them to their local DHS office.
Description of any automated system to support program	**OregONEligibility**: The ONE system is the primary system used to automate eligibility for OHP Medical programs. This verifies information from the Federal Hub including income, citizenship, incarceration status, and Social Security Numbers.
Biennial budget for services	**Health Systems Medicaid Legislatively Approved Budget 2015–2017:** **Medical Assistance Programs Total:** $13.7 billion **MAP – OHP:** $12.75B (93%) **MAP – Non OHP:** $645M (5%) **MAP Program Support:** $300M (2%) **Other Programs:** $1.4M (0%)
Funding source for budget	**Medical Assistance Programs Legislatively Approved Budget 2015–2017:** **Federal Funds:** $10.7B (78%) **General Fund:** $1.1B (8%) **Other Funds** TTX ($300M), TTTX Settlement ($102M), DSHP ($138M), Drug Rebates ($85M), Hospital Tax ($965M), Other Revenue ($301M): **Total:** $1.9B (14%)

Criteria	Agency Program Response
Agency name	Aging and People with Disabilities
Program name	Major programs include Oregon Supplemental Income Program Medical (OSIPM), the Qualified Medicare Beneficiary Program (QMB), Oregon Project Independence (OPI) and Supplemental Nutrition Assistance Program (SNAP)
Description of services offered	Primary services offered include medical care, long-term care, supportive services, food benefits
Description of caseload associated with program	Primarily serve aged (usually age 60 or 65 depending on program), blind, and disabled individuals. Most program eligibility is need based.
Description of how customers access program	Medical benefits are primarily accessed through managed care organizations. Some individuals receive benefits on a fee-for-service basis. Long-term care and supportive services are coordinated through Department of Human Services (DHS) local offices and Area Agencies on Aging (AAA). Food benefits are accessed primarily via cash benefits (funds transfer (EBT, direct deposit, or check) or the Oregon Trail Card.
Description of how referrals "to" the program occur	Referrals to our programs occur through various means including other DHS and Oregon Health Authority (OHA) programs, the Aging and Disability Resource Connection (ADRC), hospitals, nursing homes, health clinics and other medical care providers, LTC providers, other community partners and brochures.
Description of what referrals "from" the program occur & how	Referrals from our programs include referrals to other DHS programs (e.g. Temporary Assistance to Needy Families (TANF), Employment Related Day Care (ERDC), Vocational Rehabilitation (VR), etc.), OHA medical programs, Veterans Administration programs, Social Security programs including Old-Age, Survivors, and Disability Insurance (OASDI), Medicare and Supplemental Security Income (SSI) and the Senior Health Insurance Benefits Assistance (SHIBA). Referrals can take numerous forms including inter-office communications (e.g. referrals to OHA for a medical eligibility determination), direct assistance applying for benefits (e.g. dedicated staff assist qualified individuals in applying for Social Security benefits and appealing denials), client eligibility notices, and providing information to complete self-referrals.

Description of any automated system to support program	Automated programs include Oregon ACCESS, Client Maintenance System, Food Stamp Management Information System, Medicaid Management Information System, ONE and Client Application Processing Interface. These systems perform numerous functions including online application, recording and retrieval of client information, issuing benefits, sending client notices, completing level of care assessments, managed care enrollment and claims processing.
Biennial budget for services	
Funding source for budget	State general fund, federal, and federal matching funds.

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Bonneville Power Administration – Low-income Energy Efficiency
Description of services offered	Services include but are not limited to home energy conservation measures, health & safety and minor repairs, heating equipment repair/replacement, and energy education (customers of Consumer Owned Utilities)
Description of caseload associated with program	Approximately 350 households per year
Description of how customers access program	Through local community action agencies (CAA) and their subrecipients
Description of how referrals "to" the program occur	Referrals are made to CAAs by OHCS, community partners, 211, and through grantee outreach activities
Description of what referrals "from" the program occur & how	Each CAA screens clients during intake for appropriate services and referrals to other organizations or agencies
Description of any automated system to support program	OPUS database. The OPUS system is a web-based Oracle application developed by and maintained by OHCS. It is accessed primarily by OHCS and its sub-grantees. OPUS is commonly used to perform intakes and determine eligibility.
Biennial budget for services	Currently about $3 million
Funding source for budget	Bonneville Power Administration

Criteria	Agency Program Response
Agency name	Oregon Department of Education
Program name	Child Nutrition Programs
Description of services offered	Child Nutrition Programs provides reimbursement for nutritious meals and snacks served to eligible children that participate in the Child and Adult Care Food Program, Summer Food Service Program, School Nutrition Programs, USDA Foods, and Farm to School and School Garden Program
Description of caseload associated with program	Child Nutrition Specialists provide timely leadership, coordination, technical assistance, and support to institutions, programs and individuals in the administration, planning, development, implementation, monitoring, evaluation and improvement of nutrition services and nutrition education programs.
Description of how customers access program	Sponsors that choose to take part in programs get cash subsidies and donated commodities from the U.S. Department of Agriculture for each meal they serve. In return, they must serve lunches that meet Federal requirements, and they must offer free or reduced price lunches to eligible children.
Description of how referrals "to" the program occur	Child Nutrition Programs website, USDA website, School Districts, Schools, For-Profit and Non-Profit organizations, and parents.
Description of what referrals "from" the program occur & how	Sponsors must follow the USDA regulations to participate in the Child Nutrition Programs. Child Nutrition Specialists are assigned to visit Sponsors on a 3 year cycle. If a Sponsor is not incompliance they have an opportunity to correct the finding. During follow-up administrative reviews, if the finding is not permanently corrected the Sponsor can be terminated from the Program.
Description of any automated system to support program	CNPweb, an interactive database that Child Nutrition Programs uses to collect information from Sponsors, to communicate with Sponsors, to organize processes, and Sponsors submit monthly claims for reimbursement.
Biennial budget for services	Grant In Aid funds • General Fund: $6,917,794 • Other Funds: $2,395,593 • Federal Funds: $402,723,664 Total: $412,037,051
Funding source for budget	Federal Funds (USDA)

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	US DOE Weatherization Assistance Program
Description of services offered	Services include but are not limited to home energy conservation measures, health & safety and minor repairs, heating equipment repair/replacement, and energy education
Description of caseload associated with program	Approximately 350 households per year
Description of how customers access program	Through local community action agencies (CAA) and their subrecipients
Description of how referrals "to" the program occur	Referrals are made to CAAs by OHCS, community partners, 211, and through grantee outreach activities
Description of what referrals "from" the program occur & how	Each CAA screens clients during intake for appropriate services and referrals to other organizations or agencies
Description of any automated system to support program	OPUS database. The OPUS system is a web-based Oracle application developed by and maintained by OHCS. It is accessed primarily by OHCS and its sub-grantees. OPUS is commonly used to perform intakes and determine eligibility.
Biennial budget for services	Currently about $4.8 million
Funding source for budget	US Department of Energy

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Energy Conservation Helping Oregonians (ECHO)
Description of services offered	Services include but are not limited to home energy conservation measures, health & safety and minor repairs, heating equipment repair/replacement, and energy education (customers of Portland General Electric & Pacific Power)
Description of caseload associated with program	Approximately 1,400 households per year
Description of how customers access program	Through local community action agencies (CAA) and their subrecipients
Description of how referrals "to" the program occur	Referrals are made to CAAs by OHCS, community partners, 211, and through grantee outreach activities
Description of what referrals "from" the program occur & how	Each CAA screens clients during intake for appropriate services and referrals to other organizations or agencies
Description of any automated system to support program	OPUS database. The OPUS system is a web-based Oracle application developed by and maintained by OHCS. It is accessed primarily by OHCS and its sub-grantees. OPUS is commonly used to perform intakes and determine eligibility.
Biennial budget for services	Currently about $17 million
Funding source for budget	Customers of Portland General Electric and Pacific Power

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Emergency Housing Assistance Program (EHA), EHA DRF, EHA DRF Veterans
Description of services offered	Service components include: emergency shelter, transitional housing, rapid re-housing, homelessness prevention, supportive in-home services and system capacity building. Specific activities include but are not exclusive to financial assistance, housing costs including rent assistance, case management, self-sufficiency activities, and facility costs.
Description of caseload associated with program	Approximately 5000 duplicated households.
Description of how customers access program	Through Community Action Agencies and Oregon Human Development Corporation (OHDC) and their subrecipients.
Description of how referrals "to" the program occur	Referrals are made to program grantees (see above) by OHCS, community partners, 211, Continuum of Care intake organizations and through grantee outreach activities.
Description of what referrals "from" the program occur & how	Program grantees provide general information and referral for those requesting services and through the eligibility intake and assessment process.
Description of any automated system to support program	OPUS for distribution of funds and Service Point for client data through a contract with the Portland Housing Bureau.
Biennial budget for services	Currently about $7 million
Funding source for budget	General Fund (Housing Account), Document Recording Fee and Treasury Interest

Criteria	Agency Program Response
Agency name	DHS- Self Sufficiency Programs
Program name	Employment Related Day Care (ERDC)
Description of services offered	ERDC is a subsidy program that helps low-income, working families pay for child care so parents can retain employment. Families pay a portion of the child care cost called the copay. The copay depends on the family's income, size, and the amount the child care provider charges.
Description of caseload associated with program	The ERDC program has a limit to the number of families it can serve and has an average caseload of 7,700.
Description of how customers access program	Families can apply for ERDC benefits in their local DHS branch office or local Child Care Resource & Referral agency (CCR&R) by obtaining application for services. The SNAP online application can be used to apply for ERDC when used in conjunction with a supplemental interview form.
Description of how referrals "to" the program occur	DHS contracts with Child Care Resource and Referral agencies (CCR&R). They provide families information about DHS child care programs and information on finding quality child care.
Description of what referrals "from" the program occur & how	DHS staff refer families to their local CCR&R offices for education and help in finding quality child care.
Description of any automated system to support program	Client information is entered into the Client Maintenance System (CMS) where the computer updates data files for program eligibility and generates information for the provider pay system (PPS). Payments for ERDC benefits are paid directly to the provider using billing forms that are issued electronically by the PPS.
Biennial budget for services	168 million for 2015-2017 biennium
Funding source for budget	The lead agency is the Oregon Department of Education – Early Learning Division/Office of Child Care. Funds are passed to DHS for service delivery of the ERDC program. CDDF is the funding source.

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Emergency Solutions Grant (ESG)
Description of services offered	Provides funding for street outreach, emergency shelter, rapid re-housing and prevention services to reduce and prevent homelessness. Specific activities include but are not exclusive to shelter operations, case management, housing costs including rent assistance, emergency assistance, and housing relocation and stabilization services.
Description of caseload associated with program	Approximately 10,000 duplicated persons annually.
Description of how customers access program	Through Community Action Agencies and subrecipients.
Description of how referrals "to" the program occur	Referrals are made to program grantees (see above) by OHCS, community partners, 211, Continuum of Care intake organizations and through grantee outreach activities.
Description of what referrals "from" the program occur & how	Program grantees provide general information and referral for those requesting services and through the eligibility intake and assessment process.
Description of any automated system to support program	OPUS for distribution of funds and Service Point for client data through a contract with the Portland Housing Bureau.
Biennial budget for services	Approximately $1.5 million
Funding source for budget	Federal-HUD

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Housing Stabilization Program (HSP)
Description of services offered	Provides funding for short-term financial assistance and support services including case management, housing assistance and auxiliary services to TANF income eligible families who are homeless or unstably housed.
Description of caseload associated with program	Approximately 300 unduplicated households annually.
Description of how customers access program	Through Community Action Agencies and subrecipients.
Description of how referrals "to" the program occur	Referrals are made to program grantees (see above) by OHCS, DHS, community partners, 211, Continuum of Care intake organizations and through grantee outreach activities.
Description of what referrals "from" the program occur & how	Program grantees provide general information and referral for those requesting services and through the eligibility intake and assessment process.
Description of any automated system to support program	OPUS for distribution of funds and Service Point for client data through a contract with the Portland Housing Bureau.
Biennial budget for services	Approximately $1 million
Funding source for budget	TANF through interdepartmental agreement with DHS

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services
Program name	Local Innovation and Fast Track (LIFT) Housing Programs
Description of services offered	Housing Development program with potential to set aside units to serve DHS Self-Sufficiency and Child Welfare clients.
Description of caseload associated with program	Unknown. At this point LIFT is a one-time program; a portion of the funds will be used to fund housing that includes at least 5 units to serve DHS clients.
Description of how customers access program	Units set aside for DHS Self-Sufficiency and Child Welfare clients will be referred by local case manager based on a TBD set of criteria to ensure readiness for participation.
Description of how referrals "to" the program occur	Establish relationship between local project developer and management team and DHS office and case managers.
Description of what referrals "from" the program occur & how	Case managers will refer clients to housing for placement in an affordable rental unit by working directly with the project manager.
Description of any automated system to support program	While receiving case management from DHS, services will be provided from DHS.
Biennial budget for services	There are no services funded through the LIFT program; community services may be accessed by client as needed.
Funding source for budget	$40 million in Article XI-Q bonds for housing development (not services) to OHCS.

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Low Income Home Energy Assistance Program (LIHEAP)
Description of services offered	Provides home energy assistance to low-income households. Services include bill payment assistance, weatherization services, furnace repair and replacement, and energy education.
Description of caseload associated with program	Approximately 60,000 households per year
Description of how customers access program	Through local community action agencies (CAA) and their subrecipients
Description of how referrals "to" the program occur	Referrals are made to CAAs by OHCS, community partners, 211, and through grantee outreach activities
Description of what referrals "from" the program occur & how	Each CAA screens clients during intake for appropriate services and referrals to other organizations or agencies
Description of any automated system to support program	OPUS database. The OPUS system is a web-based Oracle application developed by and maintained by OHCS. It is accessed primarily by OHCS and its sub-grantees. OPUS is commonly used to perform intakes and determine eligibility.
Biennial budget for services	Currently about $70 million
Funding source for budget	U.S. Department of Health & Human Services

Criteria	Agency Program Response
Agency name	Oregon Housing and Community Services (OHCS), partnering with Oregon Health Authority (OHA)
Program name	Housing for Mental Health
Description of services offered	Housing units developed for individuals with mental illness
Description of caseload associated with program	Unknown. At this point this housing is a one-time program; the funds will be used to develop housing that includes 20% of the units to serve OHA clients.
Description of how customers access program	Individuals are OHA clients and will be referred
Description of how referrals "to" the program occur	Establish relationship between local project developer and management team and OHA office and case managers.
Description of what referrals "from" the program occur & how	Case managers will refer clients to housing for placement in an affordable rental unit by working directly with the project manager.
Description of any automated system to support program	While receiving case management from OHA, services will be provided from OHA providers.
Biennial budget for services	There are no services funded through this program; services may be accessed by client as needed.
Funding source for budget	20 million in lottery backed bonds

Criteria	Agency Program Response
Agency name	ODE
Program name	Early Learning Division
Description of services offered	Provide child care referral to families seeking child care through contracts with child care resource and referral agencies and 211
Description of caseload associated with program	Approximately 10,000 families annually have used the child care resource and referral system to find child care
Description of how customers access program	Currently through regional child care resource and referral agencies across Oregon 211 which will be expanded in July 2016
Description of how referrals "to" the program occur	Resource and Referral and applications through EL website Provider Services. We provide free technical support regarding licensing, business development; childhood development, mental health services, DHS assistance and a variety of child care related issues. CCR&R-MC also coordinates workshops and trainings for child care providers. In addition we publish a quarterly newsletter that includes helpful suggestions, a complete list of trainings and workshops, and children's activities. At no cost you can also list your businesses via Internet, allowing you to expand your client base and accessibility! Community Services. We educate and support employers regarding child care benefit options and work-life issues. We educate community stakeholders on accessibility, affordability, availability and quality in child care. We also convene, facilitate, and participate in child planning and policy-making groups advocating for families and child care providers. Website, word of mouth
Description of what referrals "from" the program occur & how	Provide information about the available CC facilities, PD services, and Quality Portfolio development. Through R&R and directly I guess I need to know more about this.
Description of any automated system to support program	R&R websites, Current systems are CCRIS, QRIS
Biennial budget for services	I believe it is around 400 million with much of it pass through
Funding source for budget	State and federal funds

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Oregon Energy Assistance Program (OEAP)
Description of services offered	Electric bill-payment assistance for low-income households
Description of caseload associated with program	Approximately 30,000 households per year
Description of how customers access program	Through local community action agencies (CAA) and their subrecipients
Description of how referrals "to" the program occur	Referrals are made to CAAs by OHCS, community partners, 211, and through grantee outreach activities
Description of what referrals "from" the program occur & how	Each CAA screens clients during intake for appropriate services and referrals to other organizations or agencies
Description of any automated system to support program	OPUS database. The OPUS system is a web-based Oracle application developed by and maintained by OHCS. It is accessed primarily by OHCS and its sub-grantees. OPUS is commonly used to perform intakes and determine eligibility.
Biennial budget for services	Currently about $40 million
Funding source for budget	Customers of Portland General Electric and Pacific Power

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services (OHCS)
Program name	Oregon Homeownership Stabilization Initiative (OHSI)
Description of services offered	Loan programs serve homeowners with negative equity who are unable to modify existing loans in the marketplace
Description of caseload associated with program	Unknown. Clients must be homeowners and have experienced a hardship (unemployment, underemployment, reduction in income) that made them unable to pay their mortgage payments.
Description of how customers access program	Via a web portal on our website.
Description of how referrals "to" the program occur	Participants self-refer, Intake agencies, housing counseling and banks refer clients to us.
Description of what referrals "from" the program occur & how	Referrals from the program are directed to housing counseling agencies if they are not eligible for our programs.
Description of any automated system to support program	All applications for Hardest Hit Funds are received via a dedicated application system, CounselorDirect. The data base allows application, uploading of documents, records payments or benefits received, allows tracking of status and facilitates reporting.
Biennial budget for services	Program expenses are $14M in a revolving loan fund.
Funding source for budget	US Treasury Hardest Hit Funds, dedicated to foreclosure avoidance

Criteria	Agency Program Response
Agency name	DHS
Program name	Refugee Program
Description of services offered	Monthly cash assistance, medical assistance, and self-sufficiency services (employment based)
Description of caseload associated with program	Average caseload for cash assistance runs approximately 375 of RCA and TANF recipients. Average caseload for self-sufficiency runs approximately 900 for RCA and TANF recipients, including those who are not on cash assistance.
Description of how customers access program	Customers access services through face-to-face interviews with either DHS employees or DHS contractors.
Description of how referrals "to" the program occur	Newly arrived refugees are brought to the DHS office or contractor's office by the resettlement agency. Secondary migrants are told about assistance through the federal Office of Refugee Resettlement (ORR).
Description of what referrals "from" the program occur & how	Refugees are referred to local resources and contractors by the DHS case manager or DHS contractor. The refugee is told about the resource and is told how to access those resources.
Description of any automated system to support program	N/A
Biennial budget for services	13.7 mil
Funding source for budget	TANF funding for those refugees who are eligible for TANF. ORR (federal) funding for those who are not eligible for TANF.

Criteria	Agency Program Response
Agency name	Oregon Housing & Community Services
Program name	State Homeless Assistance Program (SHAP)
Description of services offered	Provides funding for operation of emergency shelters and supportive services to shelter residents. Specific activities include but are not exclusive to facility management, facility conversion/rehabilitation, facility repairs, resident case management, crisis intervention, and linkage to longer term services.
Description of caseload associated with program	Approximately 30,000 – 35,000 duplicated persons annually.
Description of how customers access program	Through Community Action Agencies and subrecipients.
Description of how referrals "to" the program occur	Referrals are made to program grantees (see above) by OHCS, community partners, 211, Continuum of Care intake organizations and through grantee outreach activities.
Description of what referrals "from" the program occur & how	Program grantees provide general information and referral for those requesting services and through the eligibility intake and assessment process.
Description of any automated system to support program	OPUS for distribution of funds and Service Point for client data through a contract with the Portland Housing Bureau.
Biennial budget for services	Approximately $3 million
Funding source for budget	General Fund

Criteria	Agency Program Response
Agency name	Department of Human Services
Program name	Supplemental Nutrition Assistance Program (SNAP)
Description of services offered	Benefits to purchase food, assistance seeking employment, nutrition education.
Description of caseload associated with program	During January 2016 there were 415,695 SNAP cases which included: 736,201 people; 263,882 people under 18; 81,360 children under 5; and 80,357 people over 60.
Description of how customers access program	People can apply online, call for an application to be mailed to them or come into an office to apply. Some applications are mailed without a request when it is time to renew benefits.
Description of how referrals "to" the program occur	Various community partners explain about the program and/or help people apply for benefits. Oregon.gov has a link to the DHS web site for SNAP. USDA and FNS web sites link people to the DHS online application for the SNAP program. Aging and Disability Resource Connection of Oregon (ADRC) explains about SNAP and assists customers to start the application process.
Description of what referrals "from" the program occur & how	Referrals to community organizations for housing assistance, utility assistance, medical insurance and additional food assistance. Referrals are made to ADRC, local food banks and pantries, community action agencies, housing authorities, legal aid, Oregon Health Plan, 211info, etc. DHS gives every applicant the form DHS3400 with information about many other services throughout the state.
Description of any automated system to support program	Some notices are automatically issued via FSMIS. Most EBT benefits are automatically issued monthly. At the end of month processing; - Most TANF grants amounts are coded on SNAP cases, adjusting the next month's benefit. - Cases are determined if eligible for a LIHEAP payment and if so it is issued and coded on the SNAP case, adjusting the next month's benefit. - The LIHEAP coding is also automatically removed at end of month processing.
Biennial budget for services	Federal funds – $2,776,000,000.00 General funds – $ 162,000,000.00
Funding source for budget	Food and Nutrition Services (FNS) – 100% of the program dollars and 50% of the administrative costs. State General Fund – 50% of the administrative costs.

Appendix B - HB2219 Application Assistance Survey Results Summary

HB2219 Application Assistor Survey Background

The March 2016 Taskforce meeting was dedicated to hearing from staff whom assist Oregonians in applying for the collective suite of human service programs with a focus on challenges to the application process. Oregon Housing and Community Services, Oregon Department of Human Services, Oregon Health Authority, Oregon Department of Education, Oregon Employment Department, Outside In and 211 Info (via Outside In) shared challenges as well as recommendations for improvement.

Taskforce members suggested soliciting feedback from a broader group of agencies and staff to gain a more comprehensive list of challenges and improvement ideas. A survey was created and distributed to Taskforce members with instruction to complete it and distribute to other community stakeholders who assist Oregonians in applying for human service programs. The survey was open for 30 days and received 575 responses and 400 comments. Not all survey respondents answered each question making the total number of responses per question inconsistent. Below is the analysis of the responses received.

Survey Results

QUESTION 1

The first survey question listed 10 potential barriers that applicants may face based on the March Taskforce meeting discussion. Respondents were asked to rank each barrier on a scale from 1 to 10 with 1 being the most impactful barrier and 10 being least impactful barrier faced by applicants.

Question 1: Please rank the following barriers applicants face when applying for benefits from 1 - 10 (1 being the barrier with the greatest impact, 10 being barrier with the least impact).

Analysis was completed on the responses to this question and responses were grouped as follows:

- Questions that respondents ranked 1 thru 3 were identified as High Impact Barriers,
- Questions that respondents ranked 4 thru7 were identified as Medium Impact Barriers,
- Questions that respondents ranked 8 thru 10 were identified as Low Impact Barriers.

HB2219 Survey Question #1 - Barriers Applicants Face when Applying for Benefits	# of Respondents Ranking 1, 2, or 3	% of Total Responses
The applicant is unaware of all of the benefits (programs) that are available to them	215	37.65%
The applicant has to repeat information for each program/agency separately	208	36.43%
The applicant does not have access to transportation	166	29.07%
The applicant is confused by the language on the application	164	28.72%
The applicant is unable to provide verification of information they have provided	140	24.52%
The applicant misses required intake appointment(s)	129	22.59%
The applicant does not understand agency notices	120	21.02%
The applicant is embarrassed or feels stigmatized when they ask for help	108	18.91%
The applicant does not have regular access to a phone	97	16.99%
The applicant does not check their mail regularly	95	16.64%
Total Respondents	571	

The two barriers ranked highest by respondents were that applicants were unaware of the programs and

benefits available to them and that they had to repeat information multiple times to multiple agencies or programs.

QUESTION 2

The second survey question listed 4 potential system changes that would positively impact those applying for benefits from The State of Oregon. Respondents were asked to rank each option in order of greatest positive impact to the applicant with 1 being the change with the greatest positive impact and 4 being the least amount of positive impact.

Question 2: On a scale of 1 - 4 (1 being the largest amount of improvement and 4 being the least amount of improvement), please rank which change will improve the application process the most.

HB2219 Survey Question #2 – Changes to Improve the Application Process	# of Respondents Ranking 1	% of Total Responses
The ability to share basic applicant information across programs/agencies (i.e. address, household composition, income source)	160	28.88%
Create a screening tool for human service programs. Oregonians can enter their information anonymously and it will tell them which programs they may qualify for	159	28.70%
Streamline eligibility criteria across human services programs	129	23.29%
Streamline verification requirements across human services programs	68	12.27%
Total Respondents	554	

QUESTION 3

An additional open question was asked of respondents for them to identify changes which would drastically improve their abilities to help Oregonians apply for benefits. 398 total comments were received and several of these addressed multiple changes. 684 total ideas for change were categorized by theme and ranked by number of responses each of them received.

Question 3: If you could identify a change that would drastically improve your ability to help Oregonians apply for benefits, what would that change be?

HB2219 Survey Question #3 – Changes to Improve the Application Process (Free text box)	# of Responses	% of Total Responses *
Streamline applications and application process and share information between agencies and programs to reduce duplication and enhance services.	133	19.44%
Develop a single application for all human services programs spanning all agencies.	72	10.53%
Provide robust education and tools for all agency staff, partners, and clients about program benefits, and what types of services are available. Utilize media where appropriate to help educate. Educate agency staff on ways to be supportive and trauma informed when working with clients.	66	9.65%
Increase outreach about programs, services and benefits and utilize application assisters (including interpreters), more case managers and other staff to work with clients in their preferred setting (i.e. at home, other locations, etc.)	57	8.33%
Streamline verification requirements for all programs and agencies. Remove barriers to providing and accessing verification including gathering verification for clients where applicable.	48	7.02%

Utilize online application and better technology to allow people to get information, apply for benefits and review current benefits and statuses.	41	5.99%
Make application language clearer and simpler so that it is not confusing and a barrier to clients applying.	40	5.85%
Create a single screening tool for all human service programs.	40	5.85%
Have all human service agencies and services in single locations.	38	5.56%
Make notice and form language clearer and simpler so that it is not confusing and a barrier to clients reporting information or keeping benefits.	21	3.07%
Reduce wait times to apply for or get information about benefits.	20	2.92%
Help remove phone and mail barriers for customers. Utilize email.	19	2.78%
Help remove transportation barriers by providing clients free transportation to appointments necessary to apply for or renew benefits.	18	2.63%
Change federal funding policies and increase federal benefit levels to allow clients to get benefits easier and in higher amounts.	18	2.63%
Total Respondents	**684**	

**Comments receiving less than 2% of the total are not included in the table above so the total will not equal 100%.*

Analysis was completed on the open text comments and the following are the three main themes for change that were identified:

- Changes in the applications and application processes for all programs and benefits; the top topic areas include:
  - Streamline applications and application process and share information between agencies and programs to reduce duplication and enhance services.
  - Develop a single application for all human services programs spanning all agencies.
  - Make application language clearer and simpler so that it is not confusing and a barrier to clients applying.
  - Make notice and form language clearer and simpler so that it is not confusing and a barrier to clients reporting information or keeping benefits.
  - Create a single screening tool for all human service programs.
- Education and Outreach on programs, services and benefits as well as staff education; top topic areas include:
  - Provide robust education and tools for all agency staff, partners, and clients about program benefits, and what types of services are available. Utilize media where appropriate to help educate. Educate agency staff on ways to be supportive and trauma informed when working with clients.
  - Increase outreach about programs, services and benefits and utilize application assisters (including interpreters), more case managers and other staff to work with clients in their preferred setting (i.e. at home, other locations, etc.)
- Policy and technology changes which will enhance service delivery and remove barriers; top topic areas include:
  - Streamline verification requirements for all programs and agencies. Remove barriers to providing and accessing verification including gathering verification for clients where applicable.
  - Utilize online application and better technology to allow people to get information, apply for benefits and review current benefits and statuses.