

# Information Memorandum Transmittal Aging and People with Disabilities



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**Number: APD-IM-19-041**

**Issue date: 6/26/2019**

**Topic:** Other

**Due date:**

**Subject:** Changes/Additions to Client Index Verification Codes - night of June 28th

**Applies to (check all that apply):**

- |  |   |
|--|---|
| <input type="checkbox"/> All DHS employees                             | <input type="checkbox"/> County Mental Health Directors                       |
| <input checked="" type="checkbox"/> Area Agencies on Aging: Type B     | <input type="checkbox"/> Health Services                                      |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input checked="" type="checkbox"/> Self Sufficiency Programs          | <input type="checkbox"/> ODDS Children's Intensive In Home Services           |
| <input type="checkbox"/> County DD program managers                    | <input type="checkbox"/> Stabilization and Crisis Unit (SACU)                 |
| <input type="checkbox"/> Support Service Brokerage Directors           | <input type="checkbox"/> Other ( <i>please specify</i> ):                     |
| <input type="checkbox"/> ODDS Children's Residential Services          |   |
| <input checked="" type="checkbox"/> Child Welfare Programs             |   |

**Message:**

On the night of Friday, June 28<sup>th</sup> we will implement changes to the Client Index (CI) system. Many client demographic data elements in CI have an associated Verification Code and Verification Source code. For example, staff may verify a Date of Birth by viewing a birth certificate, immigration documents, driver's license, etc... The verification and the verification source are stored in CI. The update on June 28<sup>th</sup> will add new verification source codes and modify some existing verification source codes. The mainframe help screens will also be updated to reflect the new verification source code information.

***Background:***

The Integrated ONE system is currently under development. The system will collect data and determine eligibility for Medical, SNAP, TANF and ERDC programs. These programs are currently administered in various computer systems – CMS, FSMIS, Oregon ACCESS, OHA ONE.

DHS systems currently use the Client Information System (CI) as the person registry.

As people become known to the agency, a record containing basic person demographic data is created and maintained in the CI system. In some program areas, staff enter the information directly into the CI system in the DHS mainframe. In other areas, systems interact with CI to create and maintain the person record (e.g. Oregon ACCESS, OR-Kids...)

The Integrated ONE system contains its own person registry called the Master Client Index (MCI). MCI is currently part of the OHA ONE system. As part of the OHA ONE implementation, CI and MCI communicate with one another and some processes were developed to keep MCI and CI data synchronized. These processes will be enhanced with the development of Integrated ONE. The enhancements should result in better synchronization between CI and MCI, keeping the data more consistent.

*Issue:*

Both CI and MCI contain verification codes, which are used to indicate how specific pieces of data have been verified. For example, a Date of Birth may be verified by the worker viewing a birth certificate, a driver's license, immigration documents, etc... Staff enter the appropriate verification codes as data is verified. Because both systems contain verification codes, the codes must be consolidated and synchronized to remove duplicates, add new codes, etc...

While OHA ONE system currently synchronizes some verification codes with CI, the Integrated ONE system will provide more codes and better synchronization. During Integrated ONE design development, two issues were identified:

- 1) Integrated ONE has some verification codes that are unknown to CI.
- 2) There are some instances in which the same verification code is used in both systems, but each system is using to mean different things.

The work to standardize the verification codes across MCI and CI is not dependent upon the implementation of Integrated ONE. A decision has been made to move the new code sets into the CI system in advance of the Integration ONE implementation. This means that more codes will be known to CI, though not all of these codes will be used until the Integrated ONE system is implemented.

Also, please note that staff will see changes in CI in situations in which the same code is used in both systems, but with different meanings. **To resolve this conflict, the meaning associated with the CI code will be changed to match the Integrated ONE meaning. All CI person records using the "shared verification codes" will be converted to reflect the new Integrated ONE code.** The CI codes that will be changing to different codes are as follows:

Meaning	New CI Code	Old CI Code
Social Security Records	SS	SR
Social Security Card	SC	SS
Driver's License	DL	DR
School Record	SR	SC
Client Statement	CS	SE
Immigration Documents	IR	IM
Death Certificate	FB	DE
Obituary	OB	ON
Hospital Death Record	HD	HR
Hospital Birth Record	HR	HB
Confirmation Papers	CP	CO
Client Split	SP	CS

When changes are made in the CI system to accommodate the consolidated set of verification codes, other systems that exchange CI data will also be making changes. This means that Oregon ACCESS, OR-KIDS, etc... will be updated to pass and accept the new CI codes.

The full listing CI Verification Code changes that staff will see are outlined below. Please note that highlighted rows represent areas in which the CI code is being modified to prevent duplication with an Integrated ONE code.

Date of Death Verification Codes				
Verification Code Description	New CI Code	Old CI Code	Verification Status (Verified v. Reported)	Verification Code can be selected in CI?
Collateral Contact - Written	<b>CC</b>	<b>None</b>	R	Yes
Collateral Contact - Oral	<b>CO</b>	<b>None</b>	R	Yes
Conversion	<b>CV</b>	None	V	No, may only be generated from Integrated ONE
Death Record from Vital Statistics – including OVERS	<b>DC</b>	<b>None</b>	V	No, may only be generated from Integrated ONE

Document Viewed During Home Visit	<b>DH</b>	<b>None</b>	R	No, may only be generated from Integrated ONE
<b>Death Certificate</b>	<b>FB</b>	<b>DE</b>	V	Yes
Family/Caretaker Statement	<b>FC</b>	<b>None</b>	V	No, may only be generated from Integrated ONE
Federal Death Match File from SSA	<b>FD</b>	None	V	No
<b>Hospital Death Record</b>	<b>HD</b>	<b>HR</b>	V	Yes
OPAR State Death Match	<b>MI</b>	None	V	Yes
Need Verification	<b>NV</b>	None	R	No, may only be generated from Integrated ONE
<b>Obituary</b>	<b>OB</b>	<b>ON</b>	R	Yes
Oregon Health Department Interface	<b>OH</b>	<b>None</b>	R	No, may only be generated from Integrated ONE
<b>Client Split</b>	<b>SP</b>	<b>CS</b>	R	No – auto generated in CI
System Verified	<b>SV</b>	None	V	No, may only be generated from Integrated ONE

<b>Date of Birth Verification Codes</b>				
<b>Verification Code Description</b>	<b>New CI Code</b>	<b>Old CI Code</b>	<b>Verification Status (Verified v. Reported)</b>	<b>Verification Code can be selected in CI</b>
Collateral Contact - Written	<b>CC</b>	<b>None</b>	R	Yes
Collateral Contact - Oral	<b>CO</b>	<b>None</b>	R	Yes
<b>Client statement</b>	<b>CS</b>	<b>SE</b>	R	Yes
Conversion	<b>CV</b>	None	V	No, may only be generated from Integrated ONE

Document Viewed During Home Visit	<b>DH</b>	<b>None</b>	R	No, may only be generated from Integrated ONE
<b>Driver's License</b>	<b>DL</b>	<b>DR</b>	V	Yes
Verified by Federal Hub	<b>FH</b>	None	V	No, may only be generated from Integrated ONE
<b>Hospital Birth Record</b>	<b>HR</b>	<b>HB</b>	R	Yes
<b>Immigration Documents</b>	<b>IR</b>	<b>IM</b>	V	Yes
Need Verification	<b>NV</b>	None	R	No, may only be generated from Integrated ONE
Religious Record	<b>RR</b>	None	R	Yes
Government Issued ID	<b>SG</b>	None	V	No, may only be generated from Integrated ONE
<b>Client Split</b>	<b>SP</b>	<b>CS</b>	R	No – auto generated in CI
<b>School Record</b>	<b>SR</b>	<b>SC</b>	R	Yes
<b>Social Security Records</b>	<b>SS</b>	<b>SR</b>	V	Yes
System Verified	<b>SV</b>	None	V	No, may only be generated from Integrated ONE
Veterans Affairs	<b>VA</b>	None	V	No, may only be generated from Integrated ONE

<b>SSN Verification Codes</b>				
<b>Verification Code Description</b>	<b>New CI Code</b>	<b>Old CI Code</b>	<b>Verification Status (Verified v. Reported)</b>	<b>Verification Code can be selected in CI</b>
Collateral Contact-Written	<b>CC</b>	None	R	Yes
Collateral Contact -Oral	<b>CO</b>	None	R	Yes
<b>Client Statement</b>	<b>CS</b>	<b>SE</b>	R	Yes
Conversion	<b>CV</b>	None	V	No, may only be

				generated from Integrated ONE
Document Viewed During Home Visit	<b>DH</b>	None	R	No, may only be generated from Integrated ONE
Verified by Federal Hub	<b>FH</b>	None	V	No, may only be generated from Integrated ONE
Need Verification	<b>NV</b>	None	R	No, may only be generated from Integrated ONE
Social Security Card	<b>SC</b>	<b>SS</b>	V	Yes
Client Split	<b>SP</b>	<b>CS</b>	R	No – auto generated in CI
Verified Through SOLQ Interface	<b>SQ</b>	None	V	No, may only be generated from Integrated ONE
Social Security Records	<b>SS</b>	<b>SR</b>	V	Yes
Verified Through SSA Records	<b>VS</b>	None	V	No, may only be generated from Integrated ONE

<b>Name Verification Codes</b>				
<b>Verification Code Description</b>	<b>New CI Code</b>	<b>Old CI Code</b>	<b>Verification Status (Verified v. Reported)</b>	<b>Verification Code can be selected in CI</b>
Collateral Contact - Written	<b>CC</b>	None	R	Yes
Collateral Contact - Oral	<b>CO</b>	None	R	Yes
Confirmation Papers	<b>CP</b>	<b>CO</b>	R	Yes
Client statement	<b>CS</b>	<b>SE</b>	R	Yes
Conversion	<b>CV</b>	None	V	No, may only be generated from Integrated ONE
Document Viewed During	<b>DH</b>	None	R	No, may only be

Home Visit				generated from Integrated ONE
Driver's License	<b>DL</b>	<b>DR</b>	V	Yes
Verified by Federal Hub	<b>FH</b>	None	V	No, may only be generated from Integrated ONE
Hospital Birth Record	<b>HR</b>	<b>HB</b>	R	Yes
Immigration Documents	<b>IR</b>	<b>IM</b>	V	Yes
Need Verification	<b>NV</b>	None	R	No, may only be generated from Integrated ONE
Religious Record	<b>RR</b>	None	R	Yes
Social Security Card	<b>SC</b>	<b>SS</b>	R	Yes
Government Issued ID	<b>SG</b>	None	V	No, may only be generated from Integrated ONE
Client Split	<b>SP</b>	<b>CS</b>	R	No – auto generated in CI
Verified Through SOLQ Interface	<b>SQ</b>	None	V	No, may only be generated from Integrated ONE
School Record	<b>SR</b>	<b>SC</b>	R	Yes
Social Security Records	<b>SS</b>	<b>SR</b>	V	Yes
System Verified	<b>SV</b>	None	V	No, may only be generated from Integrated ONE
Veterans Affairs	<b>VA</b>	None	V	No, may only be generated from Integrated ONE
Verified Through SSA Records	<b>VS</b>	None	V	No, may only be generated from Integrated ONE

*If you have any questions about this information, contact:*

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