

OSNT Quarterly

Achieve with us.

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Stay informed

Stay informed about all of the great things happening at the OSNT and at The Arc Oregon by signing up for our e-newsletter. Go to our website at www.thearcoregon.org and click the *Stay In Touch* box to register.



MANAGER'S MESSAGE

Happy 2018! There has been so much happening over the course of the last two years and I want to start my message by thanking you for your patience and continued support of our OSNT program and mission that we at The Arc Oregon strive to fulfill. Most of you know me, but I wanted to officially introduce myself as the OSNT Program Manager.

As you may recall, in January 2016 Paula Boga left her position as the Trust Director and began her work as the Executive Director at Oregon Training and Consultation (OTAC). After that, I continued my duties as Administrative Assistant and began to work with our Executive Director toward my transition into trust manager and helped in the search for new staff. In July 2016, long-time employee, Tiffany Tomblason moved on to pursue other opportunities. The next 18 months held many challenges as we worked through new procedures with Key Private Bank, updated our Trust Management Software, and worked with limited staff. All the while doing our best to provide a high level of support to our subaccount holders.

This past November 2017, The Arc Oregon Board of Directors determined that the organization would move forward in a new direction under new leadership. Thus, Marcie Ingledue vacated the position of Executive Director and Paula returned as the Interim ED, through a partnership with OTAC. It has been a great benefit to have someone who is part of The Arc family and has a working knowledge of our programs and values! Since November we have been reorganizing our office and hiring new staff who will be vital to implementing our vision and mission.

I know there has been a lot of change over these last two years, and that with any change comes a sense of uncertainty. I can assure you that we have a strong team and I am excited to tackle this new year with a renewed passion and look forward to creating an even stronger program for all of you!



Cici Gaynor,
Program Manager

Cici

New Staff introductions



~ Jessica Dollarhide, Administrative Assistant, joined our team in October 2017 and has been cross-trained in the different departments to help answer questions and assist with your needs, or find the right person to do so. Before coming to The Arc she worked for a non-profit in Coos Bay, OR and just fell in love with everything that the non-profit world stands for. She loves getting to know/meet the individuals that call or stop by the office, sometimes just to say "Hi!"



~ Susan Stonecypher-Hawkins, Administrative Assistant, is the newest member of The Arc Oregon team. After a 15-year retail management career, she decided to switch gears and focus on helping the community in a more meaningful way. She is excited to learn about the world of non-profit and to start helping everyone connected to The Arc. She is particularly excited to learn everything about the Special Needs Trust program and will be helping Cici in any way she can to answer questions and concerns. When not in the office, she likes to spend her free time exploring Oregon with her family or practicing her swing on the golf course.

UPDATE ON ABLE ACCOUNTS

Since the implementation of the Oregon ABLE Savings Plan in December 2016, we at the OSNT have been receiving inquiries into the process of transferring funds from an individual's subaccount into an ABLE account.

Even though the Center for Medicare and Medicaid Services (CMS) has issued a general guideline indicating such transfers would not be considered income for purposes of Medicaid eligibility, that does not apply to Social Security benefits, or to the rules surrounding administration of a special needs trust.

The OSNT is a pooled trust and there are specific guidelines we must follow when administering the trust and authorizing activity within each beneficiary subaccount. Specifically, the Program Operations Manual System (POMS), published by the Social Security Administration dictates very specific rules around the administration of pooled special needs trusts. As of this date, the POMS have not been updated to offer any insight or guidance as to how a transfer of pooled trust funds to an ABLE account will be viewed by the Social Security Administration, or how the transfer would affect a person's benefits or eligibility for benefits.

To gather more information on this issue we spoke with Stephen Dale, at The Dale Law Firm, who specializes in special needs trusts and is one of the country's leading experts in the field. Mr. Dale has confirmed he is not aware of any pooled trusts that are currently authorizing transfers of pooled trust funds into ABLE accounts. The main reason for this is the lack of guidance from the Social Security Administration as noted above. Mr. Dale believes the most prudent course of action is to wait for the updated POMS guidelines before establishing any policy or practice around transfers into ABLE accounts.

The Arc Oregon Board of Directors was provided with the information as outlined above and agreed to hold off on implementing any policy or authorizing any transfers until the POMS guidelines are published. Once the POMS updates are available, we will revisit this issue to review the guidelines and determine when transfers may be allowable and appropriate, and will develop specific policies about when transfers would be allowed based on what is in the best interest of each individual account holder.

BENEFIT VERIFICATION

By now you should have received the annual letter from Social Security that confirms what your new monthly benefit payment will be in 2018.

If you have not already done so, please send a copy of that letter to our office. You may send it via one of the following:



OHP BENEFITS COVERAGE LETTER

We are asking that you also send your Oregon Health Plan coverage letter. It is a crucial document for us to have on file when making determinations for medical and/or dental disbursements.

If you don't have a copy of your letter, you can request one by calling 1-800-273-0557. You can then send it to us by:

@ Email sstonecypher@thearcoregon.org

☎ Fax 503.363.7168

🖱 Online www.thearcoregon.org
(go to Forms & Documents and select
Benefit Information Update form)

✉ Mail to
The Arc Oregon / OSNT
2405 Front St. NE #120, Salem OR 97301



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www.arcportal.sim2k.com

Server Error in '/' Application.

A network-related or instance-specific error occurred while establishing a connection to SQL S
SQL Server is configured to allow remote connections. (provider: Named Pipes Provider, error

Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it c
Exception Details: System.Data.SqlClient.SqlException: A network-related or instance-specific error occurred while establishing a connection to SQL Server. The server was n
connection to SQL Server)
Source Error:
An unhandled exception was generated during the execution of the current web request. Information regarding the origin and l
Stack Trace:
[SqlException (0x80131904): A network-related or instance-specific error occurred while establishing a
ARCNet.SqlCmd.GetDT(String passSql) in C:\VSProjects\ARCNet\ARCNet\Components\SqlCmd.vb:39
ARCNet._Default.Page_Load(Object sender, EventArgs e) in C:\VSProjects\ARCNet\ARCNet\Default.aspx.v
System.Web.UI.Control.OnLoad(EventArgs e) +91
System.Web.UI.Control.LoadRecursive() +74
System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesA

Version Information: Microsoft .NET Framework Version:4.0.30319; ASP.NET Version:4.0.30319.1031
    
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ONLINE ACCOUNT ACCESS

We are aware that many of you have tried to access the account login from our website to check your account balance, and have continued to receive an error. We sincerely apologize for any inconvenience that has caused. We have been working with our IT staff and have discovered the problem with the online portal is that we do not currently have a proper firewall securing the network and therefore your information would not be guaranteed to be secure. Your financial safety and privacy is of utmost importance to us! We anticipate having a firewall in place by the end of April, if not sooner. In the meantime, should you need an account statement, please do not hesitate to contact our office and we would be happy to provide you with one.

TAX STATEMENTS

Every year our beneficiaries and donors receive a tax statement from us pertaining to their OSNT sub-account. This year you should look for your tax documents to arrive from Key Private Bank by Mid-March.

PLEASE NOTE THAT YOU WILL RECEIVE THEM FROM KEY PRIVATE BANK, NOT FROM OUR OFFICE.

When you receive your tax document, if you do not know what to do, you should consult a CPA or tax preparer. Unfortunately, we cannot give you tax advice and cannot tell you whether or not you will need to file taxes.



Key Private Bank



MONTHLY STATEMENTS FROM KEY BANK

We are pleased to announce that if you are the Primary Authorized Representative on a subaccount you will begin to receive a **MONTHLY** account statement directly from Key Private Bank.

PLEASE BE ADVISED THAT IT WILL NOT BE MAILED FROM OUR OFFICE IN SALEM. If you happen to misplace it and need another copy, you can contact our office and we can send you an “unofficial” copy. While we will be reconciling with the bank and keeping our Trust Management Software as up-to-date as possible, the statement that is provided by Key Bank will be considered the official balance.

ANNUAL ACCOUNT REVIEWS

As we progress through this new year, Cici will be resuming the annual account reviews. Because it is so important for us to always have the most current information on our subaccount beneficiaries, we will be sending an Updated Joinder Agreement to be reviewed, updated, signed, and returned to us. At the same time, we will be requesting that you send us any, and all, updates to the government benefits and services that are being received. Having this information on file provides us the ability to effectively administer the subaccounts in the trust and also makes the disbursement request process faster and easier! If ever you have questions or concerns about this process, please contact us so that we can better explain. We are here to help!



CONTACT US:

The Arc Oregon
2405 Front Street NE #120
Salem OR 97301

P: 503.581.2726
F: 503.363.7168

www.thearcoregon.org

Cici Gaynor
Program Manager
cgaynor@thearcoregon.org
ext. 301

Jessica Dollarhide
Administrative Assistant
jdollarhide@thearcoregon.org
ext. 302

Susan Stonecypher
Administrative Assistant
ssonecypher@thearcoregon.org
ext. 305

Paula Boga
Interim Executive Director
pboga@thearcoregon.org
ext. 304

Watch for the next issue in April!

TRUST PRESENTATIONS

If you would like the OSNT Program Manager to make a presentation to your organization, school, community group, professional association, or other group, please contact the Program Manager, Cici Gaynor, to schedule your event anywhere in the state.

The presentation will help families learn how they can provide for their child's personal needs after they are gone, without endangering eligibility for government programs; and will also provide information on how an individual with a disability can fund his or her own trust. Families, advocates, and/or professionals will have the opportunity to learn more about the Oregon Special Needs Trust and other information on planning for individuals with disabilities.

ALREADY HAVE AN ACCOUNT??

If you, or your organization, would like to schedule a time with Cici to discuss any of the following, please contact our office.

- Filling out disbursement requests (what information needs to be included, etc)
- Annual Spending Targets
- How to access and use your account
- How to access resources that are available



CURRENT ADDRESS?

- Are you receiving OSNT mail for a beneficiary who no longer resides at your address?
- Are you still receiving OSNT mail for an individual who is deceased?
- Have you moved and forgotten to give us your updated contact information?

PLEASE contact our office right away to let us know! Not everyone remembers to keep us informed about changes, so we appreciate your help in keeping our records current.

Do you have a question or topic that you think should be featured in the next newsletter? Please send your question to cgaynor@thearcoregon.org.