* **Ticklers should be set to send packets for 2-3 WEEKS PRIOR TO BUDGET REVIEW DUE DATE.**
* **NOTE: Budget reviews MUST be done every 6 months.**
* SET TICKLERS in Oregon ACCESS (OA) for all of your ICP consumers:

Set ticklers when you receive a new ICP consumer from intake for 5-6 months out from their original ICP approval date to: “Mail packet for 6-month budget review.”

* 1. Set ticklers when you receive a transferred ICP case internally or externally for 5-6 months from the previously narrated review to: “Mail packet for 6-month budget review”
  2. Set ticklers at the time you complete each budget review for the following budget 6-month budget review for 5-6 months out

* When tickler prompts you to, send out:
  1. 210A pending notice: Language “See attached letter of verifications needed”
     1. Set date of items returned by 3 weeks from date of pending notice
  2. ICP 6-month budget review letter: With date of when ICP REVIEW IS DUE
  3. Copy of the most recent budget worksheet
  4. Self-addressed stamped envelope
* When consumer calls to ask questions:
  1. Explain the needed items and ask if they want to schedule their review time for 1-2 weeks out so they can get you the documents prior to that date or (when you receive the needed verifications in the mail):

1. Call consumer to schedule a time to complete the ICP 6-month budget review

* Review the submitted verification prior to the scheduled meeting/call to assure:
  1. Use the 6-month Budget Review Checklist provided on CM tools ICP page at the following link - <http://www.dhs.state.or.us/spd/tools/cm/ic/index.htm>
  2. Make notes about discrepancies or questions you have on expenditures in the account to ask during the meeting
* Complete the meeting/call for 6-month budget review:
  1. Ask if there are any changes needed
  2. Ask if taxes are being paid to state or allotted to spousal provider as wages
  3. Ask if they have any questions about the budget
  4. Ask if they need to set aside funds for discretionary (spent each month)
  5. Ask if they need to set aside funds for contingency (may build up in their ICP checking account)
  6. Ask if they need more WBF coupons sent to them
  7. Remind them they will receive another packet in the mail when the next review is due
* Narrate the Budget Review:
  1. Use the provided template for ICP 6-month budget review and enter into narration
  2. Set OA tickler for the next time (2-3 weeks before review is due to send out review packet)