

Oregon Aging & Disability Resource Connection

No Wrong Door - Oregon Medicaid Administrative Claiming (OMAC) Employee Resource Guide

Aging & Disability Resource Connection (ADRC) of Oregon

Medicaid Administrative Claiming for ADRC

What is Oregon's ADRC Medicaid Administrative Claiming (OMAC)?

Title XIX of the Social Security Act (the Act) authorizes federal grants to states for a proportion of expenditures for medical assistance under an approved Medicaid state plan, and for expenditures necessary for administration of the state plan. This joint federal-state financing of expenditures is described in section 1903(a) of the Act, which sets forth the rates of federal financing for different types of expenditures.

Why ADRC OMAC in Oregon?

This No Wrong Door (NWD) effort is sponsored by and promoted by the Centers for Medicare & Medicaid Services (CMS), Administration for Community Living (ACL), and Veterans Administration (VA).

The purpose is to provide a streamlined system for citizens to learn about Oregon's many long term services and supports (LTSS) options that are available to them. Although this touches upon possible Medicaid services, given options, most people will select less costly, pro-independent options. As a result, the likelihood increases that people will simultaneously benefit from a greater personal quality of life while saving taxpayer dollars.

- Oregonians have the right to be informed about the array of options and to make choices based upon options available. Without knowledge of options available, individuals who require services often default to high-cost institutional options when they actually desired low-cost options that promotes optimal independence and better fits their lifestyles.
- The NWD system supported and promoted by the CMS, ACL, and VA helps Oregon DHS uses resources more efficiently and effectively than traditional methods. By transforming state publicly administered and/or publicly funded LTSS payers and providers into a streamlined system, Oregon will gain efficiencies by reducing duplication and informing processes.

CORE COMPONENTS AND CRITERIA FOR PARTNER PARTICIPATION

RDSS

- Agencies will use RDSS for labor tracking
- Agencies will insure
- Completion of RDSS training
- Demonstrated competence on RDSS
- *Use of alternative systems is not acceptable*

RTZ

- Agencies will document ADRC NWD MAC activity in RTZ
- Agencies will insure completion of ADRC RTZ training and competency of staff using RTZ
- *Use of alternative systems is not acceptable*

Oregon's ADRC NWD OMAC Approved Start-Up Activities

Code 6B NWD INFORMATION REFERRAL/ASSISTANCE

Facilitation activities related to assisting individuals or families with the application process to obtain LTSS, Medicaid, SNAP, Veterans', OAA or other benefits that support the individual in their current setting, delay or prevent the enrollment into Medicaid, or supplement their existing level of benefits.

Information referral includes providing information about Medicaid, LTSS, OAA, OPI and other related programs that may prevent or delay the enrollment in Medicaid.

- APD Medicaid beneficiaries should be redirected to their servicing APD/AAA local office for questions related to their eligibility, benefits, or LTSS needs.
- All other individuals, including individuals that receive Medicaid from the Oregon Health Authority, DHS Self-Sufficiency or Child Welfare, may receive IR&A services and appropriately claim federal match.

Related approved tasks in this code are:

- Explaining eligibility rules and processes to individuals, family members or other chosen representatives.
- Assistance with collecting/gathering required program information,
- Assistance with application completion including necessary follow-up monitoring for successful applications,
- Activities that assist in maintaining current benefits during the redetermination process.
- Activities that support the completion of eligibility requirements (such as the requirement to pursue assets for example non-State health coverage, Veterans' benefits, child support, Social Security Administration benefits) and the provision of necessary forms or other required eligibility materials.
- Data entry & clerical (scheduling, printing, copying, initiating or replying to correspondence).

- Travel time to and from locations as well as logistical planning, and consultation with supervisors, program experts and outside agencies.

Code 6C NWD PERSON-CENTERED OPTIONS COUNSELING

Related approved tasks in this code are:

- Activities performed by a qualified Person-Centered Options Counselor:
 - Including assisting with any immediate LTSS need.
 - Conducting conversations to confirm who should be part of the process.
 - Identifying the Individual's goals, strengths and preferences.
- Activities also include a comprehensive review of private resources and informal supports as well as the development of the Person-Centered Plan.
- Facilitates the implementation of the plan by engaging private or informal resources and when applicable, making application for public LTSS, including follow-up activities.
- May facilitate diversion and transition activities including hospital to home and post-secondary school to post-secondary life.
- Data entry, clerical (scheduling, printing, copying, initiating or replying to correspondence).
- Travel time to and from locations as well as logistical planning, and consultation with supervisors, program experts and outside agencies.

Using the Random Daily Sampling Survey (RDSS)

Time Capture System

Random sampling of time spent on job duties in a day is conducted approximately once per month, and results are used for one quarter of the year. Agency managers are notified in advance, and staff are notified on the day of sampling.

GETTING STARTED WITH RDSS

Go to: www.mesd.k12.or.us

- AAA Staff who provided their names to APD are loaded into the system. Use First Name, Last Name and your Agency/District name to log-in. Washington and Clackamas are listed and Jackson-Josephine is for RVCOG.

If you need your name loaded into the system send email to:

- To take the RDSS survey, enter the dominate activity for each 15 minute period. Or keep a paper or other type of log of activities, then the survey can be completed later (up to 5 working days after the survey date).

ADRC CODING

ADRC MEDICAID CODING ACTIVITY	CODE	ACTIVATED or NOT Yet ACTIVATED	NOTES
No Wrong Door Information & Referral	6B	Activated	Core match activity. This can include activities that transition from programs such as Gatekeeper.
No Wrong Door Person Centered Options Counseling	6C	Activated	Core match activity. This includes specialty options counseling such as care transitions and as a result of Gatekeeper activities.
Other Programs for ADRC I&R and Options Counseling staff	5	Activated	When not claiming approved activities under 6B,6C,6D or non-match activities under 18-22 (breaks, lunch)
Activities such as breaks, lunch, etc.	18-22	Activated	Non-Medicaid - Count 15 minute breaks and lunch breaks.

Transfer AAA - RDSS Time Reporting

Name _____ Date _____

7:00-7:15am	11:30-11:45am	4:00-4:15pm
7:15-7:30am	11:45-12:00pm	4:15-4:30pm
7:30-7:45am	12:00-12:15pm	4:30-4:45pm
7:45-8:00am	12:15-12:30pm	4:45-5:00pm
8:00-8:15am	12:30-12:45pm	5:00-5:15pm
8:15-8:30am	12:45-1:00pm	5:15-5:30pm
8:30-8:45am	1:00-1:15pm	5:30-5:45pm
8:45-9:00am	1:15-1:30pm	5:45-6:00pm
9:00-9:15am	1:30-1:45pm	6:00-6:15pm
9:15-9:30am	1:45-2:00pm	6:15-6:30pm
9:30-9:45am	2:00-2:15pm	5:30-6:45pm
9:45-10:00am	2:15-2:30pm	5:45-7:00pm
10:00-10:15am	2:30-2:45pm	7:00-7:15pm
10:15-10:30am	2:45-3:00pm	7:15-7:30pm
10:30-10:45am	3:00-3:15pm	7:30-7:45pm
10:45-11:00am	3:15-3:30pm	7:45-8:00pm
11:00-11:15am	3:30-3:45pm	
11:15-11:30am	3:45-4:00pm	

ACTIVITIES

<ul style="list-style-type: none"> 2. SNAP Eligibility/Redetermination 3. Non-Medicaid State Programs <ul style="list-style-type: none"> 3A. Oregon Project Independence (OPI) 3B. Other Non-Medicaid State Programs 4. Older Americans Act 5. Other Programs 6. No Wrong Door <ul style="list-style-type: none"> 6B. Information Referral & Assistance 6C. Person Centered Options Counseling 8. Initial Screening <ul style="list-style-type: none"> 8B. SNAP 8C. OAA 8E. Other 14. Other State or County Funded Programs <ul style="list-style-type: none"> 14A. Federal Programs 14B. Other State Programs 14C. County Programs 14D. Other Programs 15. Adult Protective Services <ul style="list-style-type: none"> 15A. APS Screening, Assessment, Consultation <p>*These are the only approved activities to be used under ARDC – No Wrong Door Grant.</p>	<ul style="list-style-type: none"> 15B. APD Investigations/Reports <p><u>Other Activities</u></p> <ul style="list-style-type: none"> 18. Paid Break 19. Paid Leave 20. Non-Paid Leave 21. Training 22. General Administration
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IN RTZ FOR PERSON CENTERED OPTIONS COUNSELING

In Progress Notes, add a New Element: Service, and select Medicaid. See screen shot. At minimum, brief narration is required to validate appropriateness of Medicaid claiming.

Progress Notes
Encounter Date
Start Time/Stop Time (double check AM vs PM)
Problem (multiple can be selected)
Units (0.25 = 15 minutes, 0.5 = 30 minutes, 1.0 = 1hr)
Schedule Follow-Up
Service (multiple can be selected)
Mode/Location
Activity
Note/Narration (entered no later than 3 business days after contact)
* Record Event (under More Options – for significant events like falls, hospitalizations, loss of housing, etc)

Call Outcome: Referral Medicaid Units:

Non-traditional ADRC Call

Incomplete Call Save Save & Complete Cancel

* Required field. You must fill-out all required fields before "saving and completing" an I&R record.

Progress Notes

Add New Note Select a Quick Note:

B *I* U

Viewable by:

Select Element:

- Legal Services
- Medicaid**
- Other
- Prescription Drugs
- State Case Management
- Targeted Case Management

When documenting call in RTZ remember:

- **If it's not narrated, it didn't happen.**
- **Narration should be objective, factual, and free from personal bias.**
- **Should cover whom, what, and when.**

**RDSS FOR ADRC'S OREGON MEDICAID ADMINISTRATIVE CLAIMING
FREQUENTLY ASKED QUESTIONS**

Q: What software is to be used to back up RDSS records as validation of Medicaid Match activity?

A: RTZ will be the only software referred to when the State monitors for quality assurance, and possible CMS audits are conducted.

Q: Do staff need to be entering in "Medicaid" into call data or Care tool on days other than RDSS. Is this something we should be asking staff to do at all times?

A: Yes. RTZ is the software that must be used to record all ADRC services (I&R and options counseling), including Medicaid Administrative Claiming

Because staff are now Medicaid providers, they are required to get into the routine of documenting the claimable Medicaid activities at all times. Aside from audit purposes, the information will inform our cost-allocation & may provide some federal

Q: When OPI staff conduct risk assessments, a possible 6B/I&R activity, they narrate in Oregon ACCESS (OA). Is narration in OA sufficient?

A-1: The initial agreement did not encompass using any other collection systems than RTZ & RDSS. If it's not recorded in RTZ, it cannot be claimed for Medicaid match.

A-2. Also, OPI is not an activity that can be counted as a Medicaid activity.

- Within some AAA agencies, staff may have multiple crossover responsibilities (OPI, Senior Connections, ADRC and more).
 - If the activity is being sponsored by OPI, it cannot be claimed for Medicaid. That would be considered double-dipping.
 - If staff are functioning in the capacity of ADRC at the time of service, and their time is *not* being sponsored by OPI, the activity is claimable if:
 - Medicaid was mentioned as one of the options
 - If OPI time is not counted

Q: Is there a test feature to practice on RDSS?

A: The MESD technical expert is developing one for future training. APD will notify Medicaid match participants when it is ready to use.

Q: On sampling days, what happens when staff is out ill? Can the fill-in substitute?

A: Yes. The ADRC field office supervisor will arrange for the substitution.

Q: How long will staff have to complete the activities that happened on Sampling Day?

A: Participating Medicaid claiming agency staff have up to five (5) business days to complete the survey.

Q: Will there be some quality assurance and continuous improvement activities?

A: Yes. The State Unit on Aging (SUA) is using the Plan, Do, Study, Adjust (PDSA) method to develop the practice of ADRC Medicaid claiming in alignment with CMS. The "Study" segment of the plan evaluates what is being done well and where improvements are needed, and followed up with "Adjust" activities.

Q: Will I receive a notification from the system that I have a survey due?

A: The system does not generate notices of upcoming surveys.

Q: As a manager, when should I alert staff to the fact that we have a survey today to ensure the true randomness of the sample, and how am I notified?

A: Survey dates are scheduled in the fall for the upcoming year. Agency managers will receive an email with those dates. Survey dates should not be revealed any earlier than a day in advance.

Q: Are technical experts available?

A: Yes. Please start with the ADRC Statewide Coordinator. There are two reasons for this. First, the coordinator will be able to route questions and comments to the correct experts, and second, the continuity of your questions/suggestion to one place will aid in tracking trends.

Q: Shall a participating agency include the other participating agencies when asking questions and making suggestions?

A: Yes! Please do. It's likely that if you have a question, others are wondering the same thing.