

Kristi Murphy

Authorized Signature

Number: APD-PT-17-037
Issue date: 9/26/2017

Topic: Other

Transmitting (check the box that best applies):

- New policy
 Policy change
 Policy clarification
 Executive letter
 Administrative Rule
 Manual update
 Other: _____

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 | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services(ODDS) |
| <input 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"/> ODDS Children’s Residential Services | <input type="checkbox"/> Other (<i>please specify</i>): |
| <input type="checkbox"/> Child Welfare Programs | |

Policy/rule title:	411-030 / In-Home Services; 411-032 / OPI;		
Policy/rule number(s):	2017-2019 OHCC/SEIU Collective Bargaining Agreement	Release no:	
Effective date:	10/1/2017	Expiration:	
References:			
Web address:			

Discussion/interpretation: This Transmittal will cover several upcoming changes to Oregon Project Independence (OPI) service planning. Additional changes specifically related to Medicaid In-Home Service Planning have been released in a separate transmittal, PT 17-033.

Please note: The policy changes outlined below are subject to the ratification of a Collective Bargaining Agreement by SEIU members.

A workweek is defined as 12:00 a.m. on Sunday through 11:59 p.m. on Saturday. A service period will be defined as two consecutive work weeks for a total of fourteen (14) days.

Two week/14 day service period for Homecare Worker (HCW) vouchers –

When: Service periods will be implemented with the pay period starting October 1, 2017 (10/1/17). The new voucher will start October 1st to October 14th. The second will start on October 15th to October 28th. Service periods and vouchers will cross months. See the HCW calendar at:

<http://www.dhs.state.or.us/spd/tools/cm/October%202017%20Changes/2%20Week%20Pay%20Period%20List%20Format%20V2.pdf>

What: All HCWs will have vouchers authorized for each service period (including OPI, Medicaid In-Home Services, and SPPC). This change also impacts the OACCESS CAPS Service Planning, by changing all plans from a full month to a two week/14 day service plan.

- Staff are **not required** to update the service plan in Oregon ACCESS with this change until a new assessment and service plan are created.
- However, staff may choose to update an In-Home Service Benefit plan (i.e. change in provider or hours being authorized) prior to a new OPI assessment being completed.
- Benefit Eligibility and Service Planning section of CAPS. End the current 'Benefits' 'Service Category/Benefit' effective the day before the change is to occur and begin a new Benefit Plan effective the day the change occurs. For example, if a new provider is starting on 10/15/17, end the Benefit on 10/14/17 and start a new benefit on 10/15/17. This will force Oregon ACCESS to do the conversion of hours for you from monthly to the 14 day hours in the Hours Segment and the Services for Plan segment.
- When creating the new OPI service plan, open the mainframe and review the current number of hours assigned to each HCW in the HINQ,r,prime mainframe screen. To determine if the total amount of hours the individual is authorized (after 10-1-17) to have has changed.
- The hours assigned to each HCW must be reflected in the updated service plan and task list. If hours or the tasks have changed a 4105 must be sent to the HCW.
- If the hours in the Mainframe exceed the number of hours available in Oregon ACCESS service plan hours, local office tier 2 exception hours may need to be granted for service planning purposes.

Why:

- Preparing for the new electronic provider time capture system (PTC):
- Improve consumers' and HCWs' ability to managing work schedules as the same number of hours will be authorized for same number of days each service period.
- Help HCWs stay within their weekly cap.
- Standardize pay processing dates for HCWs.

Dates for Service Reviews:

- Dates for service reviews will be adjusted also to the two week authorization period. The OPI In-Home Benefit will have to be approved by the dates noted on the calendar for the voucher to the HCW to be sent. Assessments and plans may now end mid-month. This will impact the practice of all CAPS Service plan reviews need to be done before the last day of the month, service review by dates may now change to a mid-month date. Calendar is at:
<http://www.dhs.state.or.us/spd/tools/cm/October%202017%20Changes/2%20Week%20Pay%20Period%20List%20Format%20V2.pdf>

Other Information:

- There are currently 24 pay periods per year. On October 1, 2017 it will change to 26 pay periods per year with the two week pay period authorizations.
- When a Service Plan changes, it is possible that rounding the hours in Oregon ACCESS and the Mainframe may have slight difference in the number of hours authorized. Confirm hours by reviewing the hours authorized on the Mainframe, HINQ screen or using the attached OPI tool.
- This information will be communicated to all HCWs and OPI consumers who use HCWs. Communications are posted on the CM Tools page, [APD Program October 2017 Changes](#).
- Once a CAPS Service Benefit is updated, the Hours Authorization screen, the hours in the 'Asmt Hrs, and 'Alwd Hrs' columns are for two week pay periods.
- The Medicaid In-Home maximum hours (OAR 411-030-0070) do not apply to OPI. AAAs are able to apply local direction of OPI services. (OAR 411-032-0010).
- However OPI uses the Service Planning in CAPS that directly connects with the in-home hours for Medicaid. This change may require the use of a tier 2, hour exception for OPI hours in OACCESS.

- Screen shot example after 10/1/17 changes (two week authorizations and rebalancing of Medicaid In Home Maximum hours):

Hours Authorization Segment

In Home Hours		Status: Approved	Begin Date: 10/01/2017	End Date: 07/31/2018			
Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
Live-In	Live-In Services	Indep	0	0	0	0	
ADL	Bath/Personal Hygiene	Substantial	5	2	3	0	Natural Support
	Bowel/Bladder	Substantial	9	2	7	0	OPI Program
	Cognition	Full	12	3	9	0	OPI Program
	Dressing/Grooming	Minimal	1	1	0	0	
	Mobility	Substantial	5	2	3	0	OPI Program
I/ADL	Breakfast	Substantial	2	0	2	0	OPI Program
	Dinner / Supper	Full	6	0	6	0	OPI Program
	Housekeeping	Full	9	4	5	0	OPI Program
	Lunch	Full	5	0	5	0	OPI Program
	Medication Management	Full	5	1	4	0	OPI Program

Hours Authorization Segment

In Home Hours		Status: Approved	Begin Date: 02/01/2017	End Date: 12/31/2017			
Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
Live-In	Live-In Services	Indep	0	0	0	0	
ADL	Bath/Personal Hygiene	Substantial	15	10	5	0	Natural Support
	Bowel/Bladder	Minimal	10	5	5	0	OPI Program
	Cognition	Substantial	10	5	5	0	OPI Program
I/ADL	Dinner / Supper	Minimal	8	5	3	0	OPI Program
	Housekeeping	Substantial	10	5	5	0	Natural Support
	Lunch	Minimal	4	0	4	0	Natural Support
	Medication Management	Minimal	2	2	0	0	
	Shopping	Substantial	4	0	4	0	OPI Program
	Transport	Minimal	2	0	2	0	OPI Program

- Comparison screen shot example prior to 9/30/17 (monthly authorizations):

Change on processing vouchers:

- Two week service authorizations
 - See updated calendar on APD Program October 2017 Changes website: <http://www.dhs.state.or.us/spd/tools/cm/October%202017%20Changes/index.htm>
- Seven business days to complete time entry
- Pay processed on the eighth business day
- For the first two pay periods after October 1, 2017 the state agreed with SEIU to daily out of cycle payments as follows –
 - 10/31/17 – 11/13/17 out of cycle payments for 10/1/17 – 10/14/17 pay period.

- 11/13/17 – 11/28/17 out of cycle payments for 10/15/17 – 10/28/17 pay period.
- For the third and fourth pay periods after October 1, 2017 the state agreed with SEIU to bi-weekly payments as follows –
 - Pay 10/29/17 – 11/11/17 pay period on 11/19/17 and 12/6/17.
 - Pay 11/12/17 – 11/25/17 pay period on 12/11/17 and 12/20/17.

For unexpected closures due to weather – submission days and pay processing days extend based on number of closure days.

Consumer and HCW Concerns:

Some HCWs and consumers may think their hours are being reduced. However, the hours appear lower because there are less days in a pay period. Please help to explain this to them by explaining that in creating the two week service authorizations, APD rounded up the hours so that no consumer would receive less hours caused by the pay period change. For example, an OPI consumer who gets 10 hours a month (120 hours a year), will now have 5 hours per pay period rather than 4.6 hours; 26 pay periods in a year totaling 130 hours a year. A total increase of 10 hours in the year.

A suggested OPI Consumer Information notice should be sent by the AAA on their letterhead a month prior to the OPI reassessment regarding the Assessment changes. The notice is on the SUA OPI training and resources website:

<http://www.oregon.gov/DHS/SENIORS-DISABILITIES/SUA/Pages/AAA-Training.aspx>

and at APD October 2017 Changes website at:

<http://www.dhs.state.or.us/spd/tools/cm/October%202017%20Changes/Sample%20OPI%20consumer%20notification.pdf>

No Impact on: The change does not impact authorizations of other OPI services, Adult Day Services or Home Delivered Meals

Benefits:

- Managing work schedules between HCWs and consumers will be easier as the same number of hours will be authorized for same number of days each time service period.
- HCWs will be able to better stay within their weekly cap.

Oregon ACCESS change:

- On October 1, 2017, the OPI service benefit and plan in Oregon ACCESS will continue to reflect a monthly service authorization for individuals receiving OPI until the OPI benefit has ended and a new benefit has started for any reason (such as, a new assessment or decision to end and restart the benefit due to a plan change). At those times these changes will take effect.
- See example below for when the new service period authorization will display:

Benefit Eligibility and Service Planning			
Assmt Date: 08/01/2017		Valid until: 08/31/2018	
Benefits			Ben Act
Service Category/Benefit	Begin Date	End Date	Status
OPI	08/01/2017	10/14/2017	Approved
OPI	10/15/2017	08/31/2018	Pending

Mainframe change:

- As indicated on [APD-IM-17-059](#), ONGO records having existing vouchers scheduled to issue past 9/30/17 will be converted to the new service period format beginning 10/1/17. Vouchers will no longer be issued for the 1st through the 15th and the 16th through the end of the month. The new ONGO voucher will start October 1st to October 14th. The second will start on October 15th to October 28th.

Impacts to service plans with a HCW:

- For OPI it is recommended to identify the program on the 546 remarks section. As there is no identifier for OPI; staff will continue to add to remarks that the plan is for **OPI** or the **OPI Expansion Pilot** so that services can be properly charged.
- 546 remarks will need to state the total monthly hours.** Other remarks (like the co-pay % or risk management plan) may be required by local AAA procedures.
- Review the current number of hours assigned to each HCW in the CAPS OPI Service Plan and the mainframe screen HINQ (hinq,r,prime). To determine the total amount of hours the individual is now authorized to have based on the rule and policy changes.
- A monthly report will be coming from APD with the monthly HCW fees to the AAAs, with consumer and AAA totals.

Two week/14 day service period to service plans with an In Home Care Agency:

- For in home care agencies it is recommended that the CM/SC state in the 546 remarks section **the number of monthly hours for ADL and IADL services for the agency. This remark will clarify the plan, hours showing on the 546 is only for 14 days.**
- Other comments may be required by local AAA office processes.
- Monthly hours can be calculated using the 14 day tool for OPI Service Planning (attached, also on the SUA website in the OPI section).
- The table, tool and its use will be thoroughly reviewed in the OPI Service Planning Webinar offered on September 14 and repeated on the 26th (this will be recorded and posted on the SUA Training web page).

Conversion back to monthly hours for OPI Forms and OPI Consumer Fees

Continue to use the OPI Service Agreement (SDS 0287L) and OPI Income/Fee Determination Record (SDS 0287K). Use the attached tool to calculate the monthly

hours to determine consumers monthly OPI cost. The total monthly cost should be updated on the OACCESS Benefits, Service tab in the OPI Mon Fee and the OPI Fee % boxes (see below).

Case Overview	Medical Assistance	Foodstamps	Service	General Assistance
Service Benefit Detail				
Case Nbr:	Med Prog: OP	LDS Amt: 0.00		
Service Request Date: 00/00/0000	WC Consent (SDS 354) Form: <input type="text"/>			
Relocation				
Relocation In Progress: <input type="checkbox"/>	Relocation Completed On: 00/00/0000			
Service Benefit Applicant(s)				
Person:	OPI CLIENT	Prime #:	<input type="text"/>	
Case Action:	Approved	Action Eff. Date: 00/00/0000	Shelter Exception: .00	
Elig Start Date: 09/08/2008	Pay-in Amt: .00			
Admin Rule And Reason for Action:	OPI			
OPI Mon Fee :	18.20	OPI Fee % :	20.00	

Implementation/transition instructions: Refer to each section for specific change implementation requirements.

Training/communication plan: See AR 17-051, IM 17-061 and information regarding OPI on APD Staff tools October Changes:
<http://www.dhs.state.or.us/spd/tools/cm/October%202017%20Changes/index.htm>

Central office action required: Training and Technical Assistance

Field/stakeholder review: Yes No

If yes, reviewed by: AAA representatives and APD program analysts

Filing instructions:

Contact(s):	Sandy Abrams		
Phone:	503-947-2391	Fax:	503-373-1133
Email:	sandy.h.abrams@state.or.us		

Suggested OPI Consumer Information for the month prior to reassessment to be sent by the AAA.

Please print and use AAA letterhead

Before your upcoming Oregon Project Independence (OPI) service review (insert date or month) we wanted to tell you about some important changes to the assessment.

Assessment Changes

Oregon Long Term Care Services are designed to help people with high care needs who need assistance on a regular basis throughout a month. Aging and People with Disabilities has changed the rules about who can get OPI long term services and support. As an example, they are increasing the number of times a person needs help each month to qualify for services. They have also changed some of the tasks that are used to determine eligibility. This means some individuals will no longer be eligible for OPI funded services and supports.

These changes may impact you. Your OPI Service Coordinator will be able to explain the changes to you and the impact after your assessment.

If you are affected by either of these changes you will be told in writing. You will be able to request a grievance if you do not think we have determined your eligibility correctly. If you lose eligibility for OPI services you will receive your OPI rights and help with the transition off OPI services.

OPI Service Plan Hours

10/1/2017

14 day service plan hours are known, what are the monthly and annual hours

	Total 14 Day Hours	Monthly Hours	Annual Hours
<i>Please enter the 14 Day Hours Here</i>	0	0.00	#N/A
		<i>Monthly Hours (including 2 decimals) = pay period hours times 26 pay period in one year divided by 12 months</i>	
Monthly Hours, what are the pay period hours and annual hours			
	Monthly Hours	Hours Per 14 Day Pay Period	Annual Hours
<i>Please enter Monthly Hours (by whole number)</i>	0	0.00	#N/A
		<i>Pay Period hours (rounded up to nearest whole hours) = monthly hours times 12 months, (annual hours) divided by 365 days times 14</i>	