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**Number:** APD-IM-15-070  
**Issue date:** 9/11/2015

**Topic:** Developmental Disabilities

**Subject:** Medicaid - Access to K-Plan/Waiver Services for Children with I/DD

**Applies to (check all that apply):**
- [x] All DHS employees
- [ ] County Mental Health Directors
- [ ] Area Agencies on Aging
- [x] Health Services
- [ ] Aging and People with Disabilities
- [x] Office of Developmental Disabilities Services (ODDS)
- [ ] Self Sufficiency Programs
- [x] In Home Services
- [ ] County DD Program Managers
- [x] ODDS Children’s Intensive Services
- [ ] ODDS Children’s Residential Services
- [ ] Stabilization and Crisis Unit (SACU)
- [x] Child Welfare Programs
- [ ] Other (please specify): County DD Service Coordinators, Children’s Medical Eligibility Unit (CMEU), Presumptive Medicaid Disability Determination Team (PMDDT), DD Provider Technical Assistance Unit (TAU)

**Message:**

The *Medicaid and Pathways to K-Plan/Waiver Services for Children* Worker Guide, with links to supporting documents and flowcharts, is available for use on the [DD Case Management Tools](#) webpage under *Medicaid – Access to In-Home Services for Children* subject heading. The Worker Guide and some accompanying documents are also attached to this transmittal.

The Worker Guide provides:
- ✓ An **overview of types of Medicaid required** for children to access K-Plan/Waiver services through the In-Home Support program (SE151),
- ✓ **Flow charts** providing a visual representation of pathways to Medicaid services, and
- ✓ **Contact information** of offices where a child’s medical case may reside.
If you have any questions about this information, contact:

| **Contact(s):** | May Martin, Family Support Coordinator  
|                 | Becky Smallwood, Diagnosis and Evaluation Coordinator |
| **Phone:**      | 503-947-2318, May  
|                 | 503-947-2393, Becky |
| **Email:**      | may.martin@state.or.us  
|                 | rebecca.smallwood@state.or.us |
Medicaid and Pathways to K-Plan and/or Waiver Services for Children

I. Overview
Currently there are three in-home support and service programs available to children with Intellectual/Developmental Disabilities (I/DD) administered by the Office of Developmental Disabilities Services (ODDS). Each program has specific eligibility and service parameters based on State and/or Federal rules and regulations.

- **Family Support** [OAR 411-305]
- **State Plan Personal Care** [OAR 411-034], and
- **In-Home Support** [OAR 411-308]

This document is intended to provide CDDPs with a broad overview of what type of Medicaid is required for children to access K-Plan and/or Waiver services through the **In-Home Support** program. It is not intended to provide a detailed description of each in-home service program, nor to be a guidance on medical eligibility criteria. It explains how children can access K-Plan and/or Waiver services through the **In-Home Support** program, and shows those pathways through the following flowcharts:

- **Medicaid and Pathways to K-Plan and/or Waiver Services for Children**
- **Application for Medicaid via CMEU-5503 and CMEU-PMDDT**

For a list of abbreviations and definition of terms used in this document, refer to the [Glossary of Terms](#) document.

For the procedure relating to services for children who have support and service needs that require access to other ODDS programs – CIIS, foster care, and residential care – refer to the worker guide at this website: [http://www.dhs.state.or.us/spd/tools/additional/workergd/d.9.htm](http://www.dhs.state.or.us/spd/tools/additional/workergd/d.9.htm).

II. Medicaid and Pathways to K-Plan and/or Waiver Services for Children

This is a visual representation of referral pathways to Medicaid for children who have support and service needs that require access to K-Plan and/or Waiver services. It is essential that CDDPs verify what type of medical benefits a child has when exploring service options with the family.

A child can qualify for medical benefits under MAGI-based or OSIPM-based programs. Both programs have eligibility determination that are based on **financial** (e.g., family’s or child’s income) and **non-financial** (e.g., residency, citizenship, institutional level of care) criteria.

- **MAGI-based programs**: The Affordable Care Act (ACA) requires states to use the Modified Adjusted Gross Income (MAGI) financial methodology to determine a child’s medical eligibility based on his/her family household income. The MAGI
methodology disregards available resources/assets. A child can qualify for MAGI medical as a MAGI-Child or MAGI-CHIP. These programs are administered by the Oregon Health Authority (OHA).

- **OSIPM-based program**: A child can qualify for OSIPM if he/she meets the Social Security Administration (SSA) disability criteria, the OSIPM income criteria, and other non-financial criteria, including the level of support needs. This program is administered by the Department of Human Services (DHS).

- **Children (under 18 years old) and young adults (18 to 20 years old) who are in CW custody** generally qualify for CW Title XIX Medicaid. Refer to Child Welfare [OAR 413-100-0420](https://www.oregonlegislature.gov/). The type of medical coverage a child has determines what services a child may qualify to receive, as shown in the matrix below.

<table>
<thead>
<tr>
<th></th>
<th>No OHP</th>
<th>MAGI-CHIP</th>
<th>MAGI-Child</th>
<th>OSIPM</th>
<th>CW Medical</th>
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<tbody>
<tr>
<td>Family Support</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>State Plan Personal Care</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓*</td>
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<tr>
<td>In-Home Support – General Fund (if eligible)</td>
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<td>✓</td>
<td>✓</td>
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<td>In-Home Support – K-Plan</td>
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<tr>
<td>In-Home Support – Waiver</td>
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<td></td>
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<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

* See OAR [413-090-0100 to 413-090-0210](https://www.oregonlegislature.gov/) for Personal Care services through CW.

If a child is in need of in-home supports and services, clarify their current medical coverage. For instructions on how to verify medical coverage, refer to the *How to Determine an Individual's Title XIX Medicaid Eligibility by Using eXPRS VIEW CLIENT Information* document.

a. Does the child have MAGI/CW/OSIPM type of Medical? If the child has:

i. **OSIPM (Title XIX)**: Follow the procedure (e.g., CNA, LOC, ISP) to enroll the child in K-Plan and/or Waiver services.

ii. **MAGI-Child/CW medical (Title XIX)**: Follow the procedure (e.g., CNA, LOC, ISP) to enroll the child in K-Plan services.

For a **MAGI-Child**, if the child needs Waiver in addition to K-Plan services, make a PMDDT referral to CMEU for OSIPM eligibility determination.
For a child with CW medical, refer to the In-Home Support for Children Residing in CW-Paid Foster Homes worker guide, if accessing K-Plan and/or Waiver services are needed.

iii. MAGI-CHIP (Title XXI): If the child has support and service needs that can be met through formal (i.e., SPPC, Family Support) and informal supports (i.e., family, family networks) for which they are eligible – no further referral is needed.

If the child has support and service needs requiring K-Plan and/or Waiver services, make a PMDDT referral to CMEU for OSIPM eligibility determination.

b. Does the child have SSI? If the child has SSI, but no open medical case, refer to the local APD/AAA office to apply for OSIPM. Contact the local APD/AAA office and assist the family with specific processes each APD/AAA office has. Children with SSI are categorically/assumed eligible for OSIPM. Once OSIPM is opened, follow the procedure (e.g., CNA, LOC, ISP) to enroll the child in K-Plan and/or Waiver services.

c. Does the child have CW medical through General Fund (GF) only? Refer the child to CW for services. This child is not eligible for K-Plan or Waiver services.

d. Does the child have private medical only, or is the child without any medical coverage? If the child has support and service needs that require K-Plan and/or Waiver services, and does not have MAGI/OSIPM or any medical coverage, refer the family to apply for medical (MAGI or OSIPM) through CMEU as described below.

III. Application for Medicaid via CMEU-5503 and CMEU-PMDDT flowchart: This is a visual representation of referral pathways to Medicaid (MAGI-Child or OSIPM) applications through CMEU for children who need to access K-Plan and/or Waiver services. CMEU’s role with the PMDDT process is to determine financial eligibility and to facilitate the disability application process with PMDDT; PMDDT staff determines if the child meets the Social Security Administration’s disability criteria. CMEU’s role with the MAGI process is to facilitate the MAGI application process with branch 5503; 5503 staff determines the MAGI eligibility.

Does the child need Waiver services in addition to K-Plan services?

a. If no, go through the MAGI path: Submit a completed MAGI application to CMEU. Refer to the CMEU-MAGI K-Plan Services Only flowchart. The child may be eligible for MAGI-Child or MAGI-CHIP.
i. If MAGI-Child eligible, follow the procedure (e.g., CNA, LOC, ISP) to enroll the child in K-Plan services only.

ii. If MAGI-CHIP eligible, explore other services through formal supports (i.e., SPPC, Family Support) and informal supports (i.e., family, family networks).

If the MAGI-CHIP child has support and service needs requiring K-Plan and/or Waiver services, submit a completed PMDDT application to CMEU for OSIPM eligibility determination. Refer to the CMEU- Presumptive Medicaid Overview [flowchart].

1. If OSIPM is approved, follow the procedure (e.g., CNA, LOC, ISP) to enroll the child in K-Plan and/or Waiver services.

2. If OSIPM is not approved, continue with services through formal supports (i.e., SPPC, Family Support) and informal supports (i.e., family, family networks).

b. If yes, go through the PMDDT path: Submit a completed PMDDT application to CMEU. Refer to the Presumptive Medicaid (PMDDT) – CMEU Referrals [flowchart].

i. If OSIPM is approved, follow the procedure (e.g., CNA, LOC, ISP) to enroll the child in Waiver services in addition to K-Plan services.

ii. If OSIPM is not approved (and the child has not applied for MAGI), submit a completed MAGI application to CMEU.

1. If MAGI-Child eligible, continue with K-Plan services only.

2. If MAGI-CHIP eligible, continue with formal (i.e., SPPC, Family Support) and informal supports (i.e., family, family networks) for which they are eligible.

IV. Contact Information: Medical benefit cases for children reside at the following locations depending on who makes the medical eligibility determination:

- OHP branch 5503, Salem: 1-800-699-9075
- CMEU branch 5517, Salem: 5517.inbox@dhsoha.state.or.us
- CW Adoption/Guardianship office branch 5060, Salem: [http://www.orparc.org/services/AACoordinators.pdf](http://www.orparc.org/services/AACoordinators.pdf)

Note: Generally the majority of children of families who receive TANF assistance may be eligible for Medicaid; however, their medical case resides at the OHP branch 5503.
Medicaid and Pathways to K-Plan and/or Waiver Services for Children

1. **Need in-home services and meet LOC**
   - **Have OHP medical?**
     - **Yes**
       - **OSIPM**
       - **Apply for OSIPM through APD/AAA**
       - **Explore other services including SPPC and GF as needed….and**
     - **No**
       - **MAGI-Child/CW**
       - **MAGI-CHIP**
       - **Apply for OSIPM through CMEU-PMDDT**
   - **No**

2. **Have SSI?**
   - **Yes**
     - **Apply for Medicaid (MAGI-Child or OSIPM) through CMEU-5503 or CMEU-PMDDT**
   - **No**

3. **Have CW-GF medical?**
   - **Yes**
     - **Contact CW for services**
   - **No**
     - **Apply for OSIPM through CMEU-PMDDT**
     - **OSIPM approved?**
       - **Yes**
         - **Enroll in Waiver in addition to K-Plan services**
       - **No**
         - **Continue with K-Plan services only**

4. **Have private or no medical?**
   - **Yes**
     - **Enroll in K-Plan services**
   - **No (Waiver services desired in addition)**

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1. See How to Determine an Individual’s Medicaid Eligibility by Using eXPRS document
2. See Application for Medicaid Via CMEU-5503 and CMEU-PMDDT flowchart

ODDS final, 7/29/15
Application for Medicaid via CMEU-5503 and CMEU-PMDDT

Apply for Medicaid (MAGI-Child or OSIPM) through CMEU-5503 or CMEU-PMDDT

Need Waiver in addition to K-Plan services?

Yes

Apply for OSIPM through CMEU-PMDDT

OSIPM eligible?

Yes

Enroll in Waiver in addition to K-Plan services

No (if not yet applied for OSIPM)

No

Apply for OHP (MAGI) through CMEU-5503

MAGI eligible?

Yes

MAGI-Child?

MAGI-Chip?

No

No (if not applied for MAGI)

Enroll in K-Plan services only

Explore other services including SPPC and GF as needed ....and

1 See Presumptive Medicaid (PMDDT) Flowchart – CMEU Referrals