

Information Memorandum Transmittal Developmental Disabilities Services



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Issue date: 10/19/2018

Topic: Developmental Disabilities

Due date:

Subject: Updates to eligibility in eXPRS

Applies to (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input type="checkbox"/> Area Agencies on Aging: {Select type} | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Aging and People with Disabilities | <input checked="" type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input checked="" type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input checked="" type="checkbox"/> County DD program managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> ODDS Children's Residential Services | <input checked="" type="checkbox"/> Other (<i>please specify</i>): Brokerage Managers |
| <input type="checkbox"/> Child Welfare Programs | |

Message:

Recently, there have been questions regarding county-to-county transfers for eligibility in eXPRS. Additionally, eligibility updates were made October 9, 2018.

Attached, please find an FAQ update for the Eligibility in eXPRS Worker Guide to help clarify eligibility transfer requirements in eXPRS.

Additionally, eligibility in eXPRS updates include:

- Add "edit legacy" button which allows those with the Eligibility Specialist or Eligibility Specialist Processor role to edit the "type of eligibility" for an eligibility record with a notice date prior to 6/14/2018.
- Corrected ABAS requirements, to ensure that the ABAS is the Adaptive Assessment used if "skilled areas," are included.
- Updated to ensure only state user roles may use the "CIIS only" diagnosis type.
- Update so that termination date will update when "type of eligibility" is changed.
- Update so termination date is editable for notice dates prior to 6/14/2018.

-Removed display of “primary diagnosis” on the main view client screen; if the user has access to Edit or View Details for a DD eligibility line, the primary diagnosis can be seen on the detailed DD eligibility page.

-Move LOCs into “approved status,” automatically if they have at least one area 50% or greater on the ONA.

If you have any questions about this information, contact:

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Eligibility Transfers in eXPRS FAQ

Recently, there have been several questions regarding how to transfer eligibility in eXPRS. At this time, ODDS is in the process of updating the County to County Transfers Worker Guide and creating an Enrollment (DDEE) Worker Guide. However, until those are complete, ODDS wants to give clear guidance regarding the eligibility transfer in eXPRS.

In addition to publishing this FAQ, ODDS will also hold a call-in on October 29, 2018 during our regularly scheduled ES Call-In to answer any questions regarding eligibility transfers in eXPRS.

Whenever an individual changes their county of origin (whether their Case Management Services are staying with a Brokerage or not), their eligibility must transfer to their new county of origin. In order to notify a receiving CDDP of this transfer, the County to County Worker Guide should be followed:

<http://www.dhs.state.or.us/spd/tools/dd/cm/county-county-transfer-guidelines.pdf>

Once a receiving CDDP is notified of the transfer, they should receive the eligibility records. Upon receipt of the eligibility records, an Eligibility Specialist should review the records to ensure eligibility is current and valid as outlined in OAR 411-320-0080. If the eligibility is current and valid, there are three applicable scenarios in eXPRS.

1. The individual only has the basic eligibility information in eXPRS (i.e., primary diagnosis, initial eligibility, but *not IQ scores, adaptive information, etc.*);
 - a. In this scenario, the receiving CDDP should end the current eligibility line the day before the effective date on the transfer memo, choose “Other” as the reason for termination, and start a new eligibility line the same date of the transfer memo.

NOTE: You cannot end the eligibility line if your CDDP does not have an open CPA. Ensure you make any eligibility edits prior to ending the CPA.

- b. The new line should reflect all current eligibility information in the record, including adaptive scores, as applicable.
- c. The “determination status” should be set as “transfer” so that an intake date is not required, and the notice date should be the effective transfer date on the County Transfer Memo.
- d. Note: in the event that the receiving CDDP does not agree with the original CDDPs determination reason, but the person still meets eligibility criteria, this same process would be used to indicate different eligibility information. The reason ODDS is requesting this information is because the rule already requires an ES to review the eligibility documentation – this is an efficient way to add detailed eligibility information to eXPRS. Note: no DDEE/0337 is required to make this edit.

Determination CDDP:	0129	Intake Date:		Intake Status:	Select...	Determination Status:	Transfer
Notice Date:	09/11/2018	Termination Date:	12/31/9999	Termination Code:	Select...		
Type of Eligibility:	Adult						
Primary Diagnosis:	Intellectual Disability Mild(ID1: 55-75)	Full Scale IQ:	55				
Additional Qualifying Diagnosis:	Select...			Select...			
	Select...			Select...			
Significant impairment in adaptive behavior:	Assessment not required - IQ 65 or less						
	Select...						
Add Test							
Skill Areas:							
<input type="checkbox"/> Socialization	<input type="checkbox"/> Community Use						<input type="checkbox"/> Communication
<input type="checkbox"/> Self-Care	<input type="checkbox"/> Self-direction						<input type="checkbox"/> Functional academics
<input type="checkbox"/> Health and safety	<input type="checkbox"/> Mobility						<input type="checkbox"/> Leisure
<input type="checkbox"/> Work	<input type="checkbox"/> Home/school living						

2. The individual has all relevant eligibility information in eXPRS (i.e., applicable IQ scores, adaptive information, etc.) and it *does not* reflect what is in their eligibility records, but the individual still meets eligibility requirements.
 - a. In this scenario, the receiving CDDP should end the current eligibility line the day before the effective date on the transfer memo, choose “Other” as the reason for termination, and start a new eligibility line the same date of the transfer memo.
 - b. The new line should reflect all current eligibility information in the record, including adaptive scores, as applicable.
 - c. The “determination status” should be set as “transfer” so that an intake date is not required, and the notice date should be the

effective transfer date on the County Transfer Memo. This also indicates to the person viewing eligibility, that there was a change in eligibility that did not require a notice because the individual remained eligible, but a change in the records did occur.

3. The individual has all relevant eligibility information in eXPRS and it reflects what is in their eligibility records;
 - a. Nothing is needed in eXPRS, the eligibility information remains the same. The eligibility line does not need to be ended.

In the event that an Eligibility Specialist reviews the records and believes there is information in the record that contradicts eligibility (i.e., indicates the individual is no longer eligible), the CDDP must still accept the transfer. Upon transfer, an eligibility re-determination notice should be issued and the re-determination process should be followed to determine if the individual continues to be eligible, as outlined in OAR 411-320-0080. The re-determination process outlined in the Eligibility in eXPRS instructions should be followed:

<http://www.dhs.state.or.us/spd/tools/dd/cm/eXPRS-2017-Eligibility-Determination-Summary-Instructions.pdf>.

When an individual is leaving a CDDP (either due to a CDDP transfer, or a Brokerage transfer when the county of origin changes), the sending CDDP must:

1. Send eligibility records to the receiving CDDP as outlined in the County-to-County Transfer Worker Guide; and
2. End the CDDP CPA in eXPRS on the agreed upon date.

Prior to sending eligibility records, typically an ES will review eligibility records. If upon review it is noted that the eligibility record in eXPRS needs to be updated or edited the sending CDDP may end their current eligibility line and start a new line to make amendments. A DDEE (0337) may also be sent to TAU to make edits if the Notice Date is prior to 6/14/18.

In the event that an individual is leaving services (i.e., not transferring), eligibility in eXPRS and the CPA should be terminated. Eligibility in eXPRS should be terminated, *prior to* terminating the CPA to allow for the eligibility line to be

edited. In the event that the CPA is terminated, it may no longer be possible to edit the eligibility line.

If that individual is receiving paid services, TAU must be notified via an 0337. If the individual is Case Management only, no 0337 is required.