

PRESENTATION

OPI Wait List Tool

Gathering Information to give priority to those at greatest risk of out-of-home placement

OAR 411-032-0020(3)
APD AR 20-009

February 12, 2020





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DHS Oregon Department of Human Services
AGING & PEOPLE WITH DISABILITIES

Oregon Project Independence Waitlist Tool

OAR 411-032-0020(3)

This gathers this information to give priority to those at greatest risk of out-of-home placement.

By: _____
Age: _____ SSN: _____

Age questions: _____

Gender:
 Male
 Female

Race:
 Black or African American
 Asian
 Native Hawaiian or Pacific Islander
 White
 Other

Need: An interpreter A sign language interpreter

Also translated (what language):
 Braille Large print Audio tape Computer disk Other

Does the person have Medicaid or Oregon Health Plan (OHP) benefits? Yes No

Is the person currently receiving military (self, spouse or significant other)? Yes No

Does the person receive veteran or military benefits? Yes No

What kind of help is the person looking for? _____

A New Tool
OPI Waitlist Tool
DHS 2549
APD-AR-20-009

Updated tool, creating a ranking instrument that provides eligibility and risk measurement for out of home placement. Consistent with OPI goals.

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Oregon Project Independence (OPI)
Waitlist Tool
OAR 411-032-0020(3)

Purpose: DHS gathers this information to give priority to those at greatest risk of out-of-home placement.

Date: _____ By: _____
 Person applying: _____
 Address: _____
 Phone number: _____
 Date of birth: _____ Age: _____ SSN: _____
 Person answering questions: _____
 Phone number: _____

Marital status:
 Single
 Married
 Widowed
 Divorced
 Separated
 Other

Gender:
 Male
 Female

Race:
 Black or African American
 Asian
 Native Hawaiian or Pacific Islander
 White
 Other

Language spoken: _____
 Let us know if needed: An interpreter A sign language interpreter

Written materials translated (what language): _____
 Materials in: Braille Large print Audio tape Computer disk Oral presentation

Applied for or has Medicaid or Oregon Health Plan (OHP) benefits? Yes No
 Served in the military (self, spouse or significant other)? Yes No
 If yes, do they receive veteran or military benefits? Yes No

What kind of help is the person looking for?

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The form is in a PDF interactive format.

The waitlist form does not work in all internet browsers. For best user experience, download this file to your computer and open it in the latest version of the free Adobe Acrobat Reader DC <https://get.adobe.com/reader> or open it in Internet Explorer 7+.

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OPI Waitlist Tool

DHS 2549

Replaces the old OPI Risk tool 287j on 2-18-2020.

To only be used when an Area Agency on Aging has an OPI wait list need. But not required for an intake when there is not a waitlist.

The form will **no** longer updated, as the 287j, OPI risk tool was repeated.

This form is only for the time when the individual is on the waitlist.

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OPI Waitlist Tool

DHS 2549

How often should it be updated?

It was created to be updated every 6 months. The public who are on the waitlist and information used to create the score are changing based on need and access to help.

AAA create their policy for Waitlist maintenance

Follow local policy. AAA's may need to update policy due to the new tool.

For the rules regarding the OPI waiting list see: [OAR 411-032-0005 \(2\) b\) C, G and 411-032- 0020 \(3\) b\) B](#)

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Updating your AAA waitlist

The new form does not calculate points and score in the same manner as the prior risk tool.

Each AAA will need to update their waitlist in the next 6 months, by August 31, 2020.

Based on testing, feedback and the intent of the changes of the form the new scores may be more accurate to predict need.

The scoring on this tool will reprioritize individuals on the list.

Each AAA will develop a plan on how this will be done

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Not currently available on GetCare

The screenshot shows the Oregon Project Independence (OPI) website. At the top, there is a navigation menu with links for Home, Report Abuse & Fraud, News, Providers & Partners, and About DHS. Below the menu, the page title is "Oregon Project Independence (OPI)". A sub-header reads "Department of Human Services | Seniors & People with Disabilities | SUA". A main heading says "Many services, programs and resources are available to help an adult continue to live at home. Use this page to find information about Oregon Project Independence, Adult Day Transportation, Money Management, Home Repair/Adaptation, and more." Below this, there is a "Forms" section with a list of links: OPI Fax Schedule 2020, OPI Fax Schedule 2019, OPI Checklist, OPI Service Plan Issues (1st 3rd/5th/7th), OPI Service Agreement, OPI Service Agreement 2019, OPI Underpayment Form and Waiver, OPI Underpayment Form and Waiver, OPI Risk Tool Form, OPI Fax Determination 200, 400, 500, OPI Fax, OPI Service Agreement 2019, OPI 2019, OPI, OPI Underpayment Form and Waiver, OPI Underpayment Form and Waiver.

- The risk tools that you have entered in GetCare will still be there, but the new form is not yet available. It is likely months from being available there.
- The form will be on the CSSU [OPI website](#) and the DHS [Forms Server](#)

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Getting to know the new tool

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Demographics

Similar information from other forms.

- Social Security Number is needed to create a person in OACCESS for OPI. Note if they decline or do not have one.
- What kind of help is the person looking for? Go into the details. The box will expand as you type.

[Save As](#) | [Reset](#) | [Print completed form](#) | [Print a blank copy](#)

Oregon Department of Human Services
Oregon Project Independence (OPI)
Waaitest Tool
OAR 411-032-0020(3)

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Date: _____ By: _____

Person applying: _____

Address: _____

Phone number: _____

Date of birth: _____ Age: _____ SSN: _____

Person answering questions: _____

Phone number: _____

Marital status:	Gender:	Race:
<input type="radio"/> Single	<input type="radio"/> Male	<input type="checkbox"/> Black or African American
<input type="radio"/> Married	<input type="radio"/> Female	<input type="checkbox"/> Asian
<input type="radio"/> Widowed		<input type="checkbox"/> Native Hawaiian or Pacific Islander
<input type="radio"/> Divorced		<input type="checkbox"/> White
<input type="radio"/> Separated		<input type="checkbox"/> Other
<input type="radio"/> Other		

Language spoken: _____
 Let us know if need: An interpreter A sign language interpreter

Written materials translated (what language): _____
 Materials in Braille Large print Audio tape Computer disk Oral presentation

Applied for or has Medicaid or Oregon Health Plan (OHP) benefits? Yes No

Served in the military (self, spouse or significant other)? Yes No

If yes, do they receive veteran or military benefits? Yes No

What kind of help is the person looking for?

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Waitlist Score

Combined score for waitlist:	
0 = No score (N)	1-5 = Low score (L) 6-10 = Moderate score (M) 11-17 = High score (H)
Waitlist score: No score	Waitlist score (low, medium, high): 0

Same numeric breakdown as the prior tool, but the method of scoring similarities ends there.

- This tool considers the primary elements for service eligibility (mobility, elimination, cognition, bathing, dressing, medication management and eating) combined with how often help is needed by another person with if the assistance is adequate to meet the needs. It includes elements of the risk to move due to lack of care, falls, ER visits, hospital stays and terminal illness.

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Score Changes

The prior OPI risk tool had different scores than this waitlist tool.

The old tool did not take Service Eligibility into account, one of the goals of the update was to have a preliminary look at those needs for services based on the CAPS

AAAs are being asked to update the individual waitlist scores they have in the next 6 months. During this time of transition, the AAA will direct staff on the actions to take when openings occur. Such as if they should use the old risk score or the new waitlist score.

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For each question in this section, consider these things:

- In the last **30 days** did the person **need hands on help from another person** to do these things? (*Answer yes or no.*)
- How often did the person need help (*daily, weekly, monthly or never*)? (*Frequency is critical information.*)
- Does the person feel their need is met, unmet or insufficiently met?

To calculate the waitlist score in questions 1-10:

- If **no**, go to the next question
- If **yes**, add .5 point if weekly or daily and add .5 point if unmet or insufficient

There is a maximum of 1 point for each answer in 1-10.

General Information for questions

- Time Frame – did the need occur in the past 30 days. Frequency is important.
- Is the need for care sufficiently met, or is there a need for additional care?
- To be successful in the activity did they need help from another person?

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Oregon Project Independence (OPI)
Waitlist Tool Question Instructions

Hide instructions

Instructions for Questions

Insufficient: Insufficient could mean:

- Inadequate
- Need is only met sometimes, or
- Caregiver is not able to help every time there is a need.

Question 1: Needs help getting around inside the home (*even if the person uses a wheelchair, walker, cane or other equipment*)

Instruction: Find out if they need hands-on help from someone to move around inside their home (*even if they use mobility equipment*).

Question 2: Needs help with moving around or ambulating when outside of their home

Instruction: Find out if they need help from someone to get from one point to another moving around outside of their home. Even if the person uses a walker, canes, or a manual or electric wheelchair or scooter.

Question 3: Needs help getting out of bed or chair

Instruction: Find out if they can stand up or sit down into or out of a chair or bed or if they need someone to help them.

Question 4: Needs help bathing

Instruction: Find out if they need someone to help them take a bath or shower. This can include whatever they consider a bath, such as a bed bath.

Question 5: Needs help dressing

Instruction: Find out if they need help to put on or take off clothes. This can include if they need help to put on or take off braces, compression stockings, etc.

Question 6: Needs help going to the bathroom

Instruction: Find out if they have toileting needs. This includes help with incontinence supplies, adjusting clothing, wiping or cleansing. It also includes catheter care or ostomy care.

Question 7: Needs help communicating and expressing needs and urgent problems

Instruction: Find out if the person can identify their urgent needs and safety-related needs. Find out if they need help to find the right words or to finish their thoughts. **Note:** this is not a language issue. If they speak or read another language please note this on page 1.

Question 8: Needs help managing medication

Instruction: Find out if they need help from someone to order, organize, remind or give them their medication.

The last two pages have the information regarding the questions. If you print this form you can choose not to print these pages.



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1. Needs help getting around inside the home (even if the person uses a wheelchair, walker, cane or other equipment)
- Yes No
 Daily Weekly Monthly Never
 Met Unmet Insufficient

Questions in this section are formatted in a similar way.

* **No** - go to the next question.

* **Yes** - ask further questions exploring for how often another person is needed to help them complete this task or need. The frequency of daily or weekly have **0.5** points associated. Monthly and never do not get points, but indicates needs.

Next is the question regarding if the needs are being met, needs more help (insufficient) or if the need is unmet. **0.5** points are awarded for unmet and insufficient.

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There is one-point total for a yes answer to either or both questions in 11. For a no answer to both questions, there are no points.

11. If they don't get help with the above do they believe they will (either or both):
- Move out of their home?
 - Go into a place with services in the next six months to get the help they need?
- Yes No

Question 11

One point question, if yes to either or both statements. The intent is to see if we can prevent them from leaving their home with extra help.

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Questions about finances and mental illness

#12 does not award points, because OPI does not have any. It is information only to offer the opportunity to talk about Medicaid and use of resources for care needs.

There is not a question in the Waitlist tool about Mental Health needs or Mental Illness because if that is the driving need for care and they are under 60. OPI and APD cannot serve them. The program is for individuals with aging and physical disability needs.

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Medical and fall risk

Studies reviewed and information concludes the direct correlation between falls, ER visits and hospitalizations in the past 6 months to risk of needing care outside their home.

Questions 13-15

1 point for each yes, no matter the frequency. Information shared from the caller can be estimates.

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Terminal illness or on hospice

Question 16

An identified issue with the prior tool was a lack of ability to give priority to individuals with an urgent and likely short term need, such as people who would identify themselves as fitting this criteria in question 16.

This question is heavily weighted as a yes answer gives **3** points.

OPI is based on self disclosure. If they state to you at the waitlist conversation that they are terminally ill or on hospice, we take that information as it is. When there is an opening the OPI CM can discuss further.

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Information

- Intended to prompt the call taker to follow up on topics related to the OPI request.
- Some of these services could be immediately started, while they wait for OPI.
- All fields expand.
- Other information and Chronic health conditions is a place to add that type of information that is shared during the call or visit.

Follow up information
Has someone: <ul style="list-style-type: none"> • Hurt them physically • Stolen from them • Withheld help or essentials, or • Threatened to do any of these things?
Has concerns about finances or is unable to pay bills:
Referral to other Older Americans Act (OAA) programs:
Community resource referral:
Needs medical equipment or assistive technology to meet needs:
Other information and chronic health conditions:

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Action Request Transmittal
Aging and People with Disabilities



Oregon Department of Human Services

AR 20-009

This transmittal tells of the actions needed to implement the new form.

Angela Munkers
Authorized signature

Number: APD-AR-20-009
Issue date: 2/12/2020

Topic: Forms
Due date: 2/18/2020

Subject: Oregon Project Independence Waitlist Tool

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: Types A and B	<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"/> Support Service Brokerage Directors	<input type="checkbox"/> Other (please specify):
<input type="checkbox"/> ODDS Children's Residential Services	
<input type="checkbox"/> Child Welfare Programs	

Reason for action: The OPI Risk tool has been updated, stop using this form no later than February 17, 2020. The OPI Wait List Tool, DHS 2549 A (paper) and 2549 B (electronic) versions will be used after February 18, 2020 and are available on the CSSU [OPI website](#) and the DHS [Forms Server](#).

Action required:
The **Wait List Tool** (previously OPI Risk Form 287J) has been updated and revised to more accurately predict OPI service eligibility. The tool now **DHS 2549** is updated to include department required demographic information and it includes instructions. This form is to be used with both the Pilot and the 60+ program.

The updated tool reflects an individual's physical, functional and social service needs including factors that identify the person at risk for out of home placement. The tool is to be used when an Area Agency on Aging has a wait list as a method of serving those greatest in need first (OAR 411-032-0020 3 b).

AAAs will begin using this tool no later than February 18, 2020 and will update all individuals wait listed in the next 6 months (by August 31, 2020). The scoring on this tool will reprioritize individuals as the wait list scoring is different from the risk tool. This tool will be evaluated in September 2020 with the AAAs.

DHS 0078 (01.19)



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Key Points

- Start using on February 18, 2020
- Use with you local AAA waitlist policy
- Only use this form when the AAA has a waitlist
- The form is not needed for intakes when there is no waitlist
- Do not continue to use the Risk tool 287j
- Use the free most current PDF format

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Questions and follow up

- Questions and report issues to OPI.Policy@dhsosha.state.or.us
- Form will be reviewed in August 2020

Sandy Abrams
OPI Policy Analyst

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