



OREGON DEPARTMENT OF
Human Services

Welcome to the OPI-M Power Hour

Starting at 2:05pm



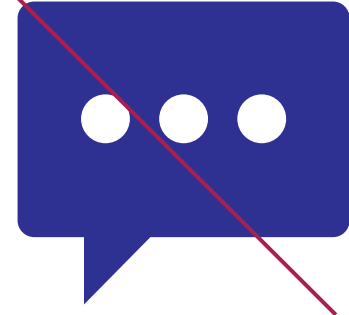
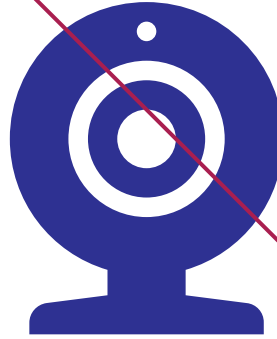
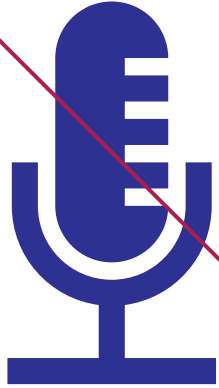
July 22, 2026



OPI-M Power Hour

Mckynna Capson, OPI-M Policy Analyst
Brian Sexton, OPI-M Policy Analyst

Mics, camera and chat are not available



Use the Q and A
feature for questions.

Agenda

1. Recent transmittal updates
2. Risk Assessments/Contacts
3. Q and A



APD-IM-26-071 Information about the Oregon ACCESS release scheduled for July 17, 2026.

Target audience: Type A and B AAA/APD SCMs, OPI-M Supervisors

Action needed:

- Beginning 7/17/26 OPI-M CM Services Due Report is live
- Consumers will remain on the report after contacts are logged
- A new column will keep count of the number of contacts made each month

APD-AR-26-017 Mandatory Case Management Webinar scheduled for July 2026

Target audience: Type B AAA/APD ECMs, OPI-M Supervisors

Action needed:

- Register and attend one of two Mandatory CM Webinars
- A recording of the Webinar will be available on Workday Learning for those CMs that could not attend

APD-PT-26-009 Community Based, PACE and Nursing Facility rates

Target audience: Type A and B AAA/APD SCMs, OPI-M Supervisors

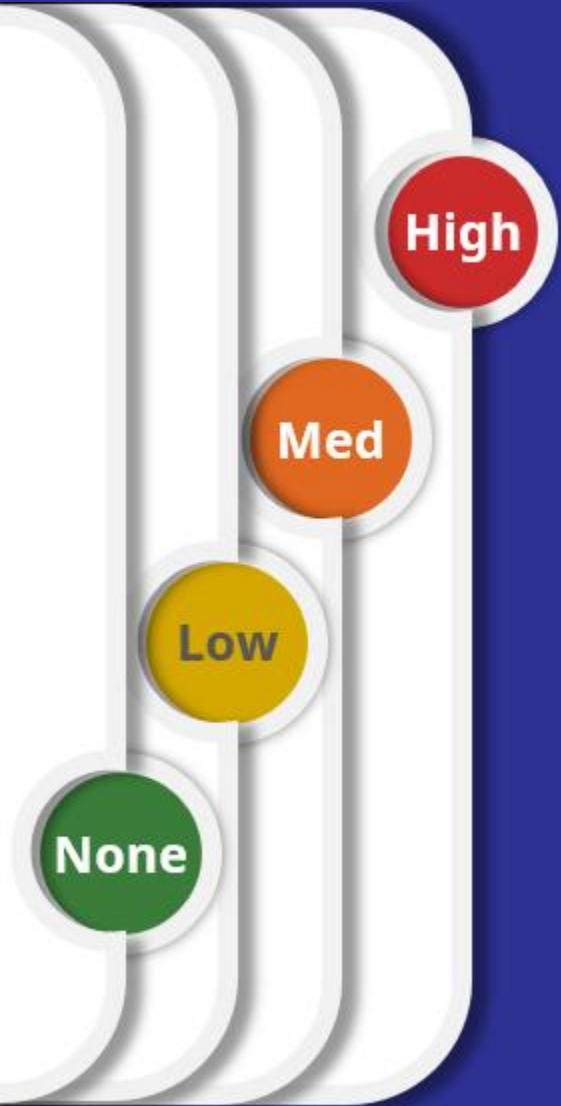
Action needed:

- Be aware of changes to:
 - Resource limit
 - Resource assessment calculator
 - Minimum/maximum monthly needs allowance
 - Minimum/maximum community spouse resource allowance (CSRA)

Risk level outcomes, lookbacks, and intervention

Risk level	Predicted outcome	30-day lookback	Harm intervention
High risk 	Identified concern that without mitigation will likely cause substantial injury or loss within the next 30 days.	Individual experienced substantial harm in past 30 days; harm will likely reoccur without mitigation.	Urgent intervention required to treat or prevent significant deterioration or loss of function and/or law enforcement response, loss of housing or financial loss over \$2,000.
Medium risk 	Identified concerns without mitigation may likely cause minor injury or loss within 90 days.	Experienced minor injury or loss within past 30 days. Will reoccur or worsen if not mitigated.	Minor non-medical intervention addressed through support, home remedies, etc.; housing remains secure; financial loss is \$2,000 or less.
Low risk 	Identified concern without mitigation may result in harm. Risk of harm is not imminent or likely within next 90 days.	Harm occurred within last 30 days but is mitigated and unlikely to occur within next 90 days.	Risk concerns and mitigation efforts are addressed successfully and are monitored.
No risk 	No identified concerns and no harm likely to occur within next 90 days.	No harm in previous 30 days.	None.

Risk levels – High, medium, low and none



Risk levels - high

- Likely to cause substantial injury or loss within the next 30 days, or
- Caused substantial injury or loss in the past 30 days and likely to reoccur if not mitigated.

High

Med

Low

None

Substantial injury or loss:

Urgent medical (hospital, Emergency room, Dr. office) intervention necessary to treat the injury or prevent significant health deterioration or loss of functioning, and/or, law enforcement involvement, loss of housing or financial loss exceeding \$2,000.

Risk levels - medium

- Likely to cause minor injury or loss within the next 90 days, or
- Caused minor injury or loss in the last 30 days and likely to reoccur if not mitigated.

Med

Low

None

Minor injury or loss:

Medical intervention is not needed (natural supports, home remedy/over the counter, or time heals), housing is secure, and/or financial losses would be \$2,000 or less.

Risk levels - low

- May result in harm, but not likely in the next 90 days, or
- Caused harm but is mitigated and unlikely to reoccur in 90 days.

None

Low

Harm:

Injury or loss of any severity.

Risk levels - none

- No identified concerns and no harm likely within next 90 days, and
- No harm in previous 30 days.

None

Using risk templates

 Risk Assessment 

Rules and transmittals

- [Transmittals](#)

Manuals, guides and tools

- [Comment Box Guide](#)
- [Comment Examples](#)
- [FAQs for Risk Assessment for In-home and CBC](#)
- [Procedures For Risk Assessments, Mitigation, Monitoring and Documentation](#)
- [Risk Level Definitions and Quick Reference Chart](#)
- [Worksheet and Guidelines](#)

Forms

- [Risk Assessment Comment, Mitigation and Monitoring Templates](#)

Training and other resources

- N/A



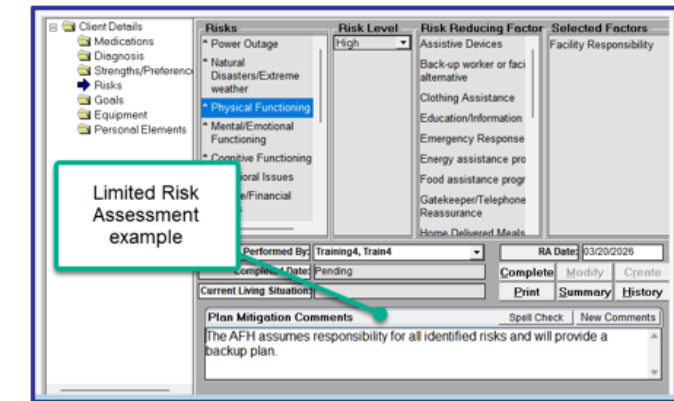
Risk Assessment Comment, Mitigation and Monitoring Templates

Updated: April 29, 2026

Required use of templates

Case managers (CMs) are required to use the standardized documentation templates in this reference guide when documenting risk assessments and backup plans in Oregon ACCESS (OA) for in-home service eligible individuals.

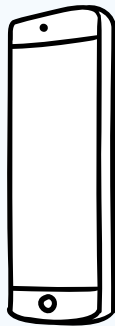
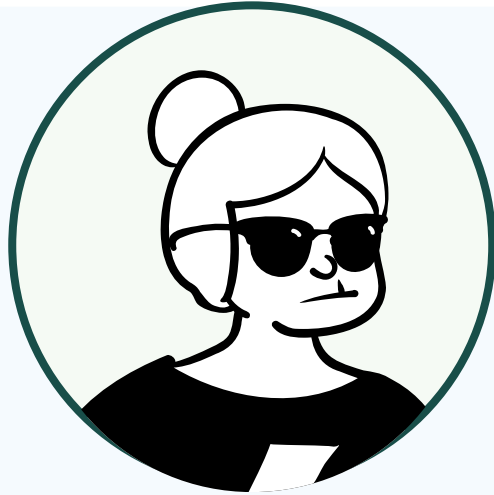
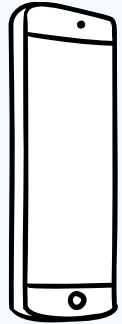
Note: For individuals residing in Community Based Care (CBC) facilities, complete a **limited** risk assessment. In the comment box document that the facility assumes responsibility for all identified risks and serves as the backup plan. Risk assessments for individuals in nursing facilities are not required.



Risks	Risk Level	Risk Reducing Factor	Selected Factors
Power Outage	High	Assistive Devices	Facility Responsibility
Natural Disasters/Extreme weather		Back-up worker or facility alternative	
Physical Functioning		Clothing Assistance	
Mental/Emotional Functioning		Education/Information	
Cognitive Functioning		Emergency Response	
General Issues		Energy assistance program	
Financial		Food assistance program	
		Gatekeeper/Telephone Reassurance	
		Home Delivered Meals	

Performed By: Training4, Train4
RA Date: 03/20/2026
Complete Modify Create
Print Summary History
Plan Mitigation Comments
The AFH assumes responsibility for all identified risks and will provide a backup plan.

Monitoring for all risk levels



High risk(s)

- Monthly Risk Focused Direct Contact

No, low or medium risk(s)

- Quarterly Risk Focused Direct Contact

Risk monitoring/mitigation

- Entered as Direct CM Service Activity

CM Services Due Report – OPI-M (new)

CM Service(s) Due Report - OPIM

From Date: 03/01/2026

To Date: 03/31/2026

Print Date: 03/24/2026

Branch #: 1513

Worker Name:

Client Name

VINCENT

No. of contacts: Mar 2026:0

Service Type

(No Overdue Svcs)

CM / Risk

CM

Last Service Date

01/13/2026

Service Due Date

03/31/2026

CROUSE

Direct

Risk

03/31/2026

No. of contacts: Mar 2026:0

Entering risk focused Direct Contacts

Frequency:

- Complete at least once per quarter for all individuals

Format:

- Use the Risk Mitigation and Monitoring Contact Template

Where:

- Oregon ACCESS → CM Services → Risk Mitigation and Monitoring service type

Risk Assessment Comment, Mitigation and Monitoring Templates

Direct case management: Risk mitigation and monitoring contact template

Direct contact-risk monitoring

Contact date: [mm/dd/yyyy]

Contact made with: [Individual or Consumer-Employer Representative. (737 Form)]

Review of assessed risk and mitigation plan: [If a high/medium risk is previously documented, or there is a new high/medium risk, discuss the concern and review the current mitigation plan status. Update mitigation strategies if needed. If there are low or no risks, document that risks were reviewed with the individual and there are no new/additional risk concerns.]

Individual/CE rep understanding/acceptance of plan: [Document the individual/rep understanding and agreement or disagreement with the plan.]

Review of current backup plan: [Document that the back-up plan was reviewed and updated if appropriate and that contact information is accurate. Refer to risk assessment.]

Risk assessment updated as appropriate: [Indicate if risk assessment was updated or if there are no changes. Refer to risk assessment for details.]

Risk for your information

- Risk comment box has a character limit of 1000
 - Changes to OA are coming to incorporate templates
- Helpful links to more information

Questions and discussion



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