Oregon Project Independence-Medicaid (OPI-M)

Section 1115 Quarterly Monitoring Report
Demonstration Year: 1 (February 13, 2024 to January 31, 2025)
Demonstration Quarter: 1 (February 13, 2024 to April 30, 2024)

Contents

Introduction 3

Demonstration Quarter Focus 3

Key Accomplishments of the Quarter 3

- **Operational Needs** 3
- **Staff Readiness and Training** 3
- **Preparation of Demonstration Deliverables** 4

Post-Award Public Forums 4

Upcoming Activities 4

Quarterly Expenditures 4

Overall Demonstration Development/Issues 4

- **Operational/Policy Issues** 4
- **Financial/Budget Neutrality Development/Issues** 5
- **Consumer Issues** 5
- **Quality Assurance/Monitoring Activity** 5
- **Demonstration Evaluation** 5

Additional Resources, Enclosures and Attachments 5

- **Budget Neutrality** 5
- **Demonstration Website** 5

Introduction

On February 13, 2024, the Centers for Medicare and Medicaid Services (CMS) approved Oregon's request for a Section 1115 Medicaid demonstration, entitled "Oregon Project Independence-Medicaid (OPI-M)". The demonstration is to provide services to individuals ages 18 and older who are older adults or adults with physical disabilities with assessed needs in Activities of Daily Living. The demonstration also provides supports to unpaid caregivers to help meet beneficiaries' assessed needs while sustaining the caregivers' ability to meet those needs.

Demonstration Quarter Focus

This quarterly report is an overview of the activities from February 13, 2024 through April 30, 2024, the first quarter of the first year of the demonstration. It includes information about planning and implementation activities and demonstration deliverables. The demonstration website is maintained as required in the Standard Terms and Conditions (STCs) and can be found under Additional Resources, Enclosures and Attachments.

Key Accomplishments of the Quarter

Aging and People with Disabilities (APD) spent the first quarter of the first demonstration year focused on upcoming implementation and demonstration deliverables.

Operational needs

With the demonstration approval, APD began the final development of all operational needs in anticipation of implementing OPI-M by June 2024. This included meeting with key community partners, developing local implementation plans for each service area, training and policy finalization, and IT systems development.

Staff readiness and training

The first of many training modules was made available to staff. Module 1 provides additional information on case management related tasks to help administer OPI-M. The training is available to all staff who engage with individuals interested in or currently receiving services through APD and Area Agencies on Aging (AAAs). This

includes, but is not limited to, case managers, eligibility workers, Aging and Disability Resource Connection (ADRC) staff, and support staff.

Preparation of demonstration deliverables

In preparation for demonstration deliverables due in May 2024, APD worked with the Oregon Department of Human Services (ODHS) Office of Program Integrity, Quality Assurance (QA) Waiver Team on a draft HCBS Quality Improvement Strategy. APD also, in coordination with the QA Waiver Team and Adult Protective Services, wrote draft HCBS Performance Measures.

Post-Award Public Forums

Not applicable for this reporting quarter.

Upcoming Activities

- May 2024: Submit HCBS Performance Measures Report and HCBS Quality Improvement Strategy Report
- May 2024: Release additional staff training
- June 2024: Begin OPI-M implementation
- July 2024: Submit Quarterly Budget Neutrality Report

Quarterly Expenditures

There are no expenditures to report due to the implementation of OPI-M not beginning until the second quarter of demonstration year one.

Overall Demonstration Development/Issues

The following is first quarter demonstration development and issues.

Operational/policy issues

For operational/policy issues, APD's primary challenge is within the IT systems development. Some issues were identified that will cause a delay in full implementation of the "In-Home Support and Personal Care Service" option, one of the primary service options for this demonstration. Specifically, payment for In-Home Care Agencies were hampered by IT barriers. APD is actively working on a solution to minimize the delay in providing this option.

Financial/budget neutrality development/issues

For financial/budget neutrality development and issues, there were no services and expenditures in the first quarter due to OPI-M implementation scheduled for June 2024. Additionally, the state is in consultation with CMS on the categories for reporting expenditures for services on the CMS-64. According to STC 47, the state will provide CMS with quarterly budget neutrality updates using the Budget Neutrality Monitoring Tool that will be provided through the PMDA system. The tool will incorporate the "Schedule C Report," comparing the demonstration's actual expenditures for services to the budget neutrality expenditure limits provided in STC 51 (based on the projections of the amount of FFP that the state would likely have received in the absence of the demonstration).

Consumer issues

Not applicable for this reporting quarter.

Quality Assurance/Monitory Activity

Not applicable for this reporting quarter.

Demonstration Evaluation

Not applicable for this reporting quarter.

Additional Resources, Enclosures, and Attachments

The following provide information on additional resources applicable to the first quarter of demonstration year one.

Budget Neutrality

The Quarterly Budget Neutrality Report for DY1 Q1 will be uploaded into the PMDA system by the 07/11/2024 due date.

Demonstration Website

The demonstration website can be found at https://www.oregon.gov/odhs/providers-partners/seniors-disabilities/Pages/1115-demonstration-waiver.aspx.