Oregon Project Independence – Medicaid (OPI-M)

Section 1115 Quarterly Monitoring Report

Oregon Department of Human Services

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OPI-M Quarterly Monitoring Report

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 May 1, 2024 through July 31, 2024, the second quarter of the first year of the demonstration. It includes information about implementation, operational 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 second quarter of the first demonstration year focused on staff training and readiness, OPI-M implementation, Information Technology (IT) system development, and proposed rulemaking.

Operational needs

During the second quarter, in June 2024, APD began working its implementation plans for OPI-M. Throughout implementation, APD continued to elicit feedback from community partners and staff regarding OPI-M operational needs. This included beginning a biweekly OPI-M workgroup with impacted staff, a Rule Advisory Committee, further IT systems testing, and daily (Monday-Thursday) Question and Answer meetings for staff. APD also developed the Central Office Financial Eligibility (CO FE) Team to help reduce local office workloads so Eligibility Case Managers could focus on service eligibility. The CO FE Team completed all OPI-M financial eligibility determinations for APD offices.

Staff readiness and training

Seven additional training modules, two tutorials, and two live trainings were held during the quarter to help prepare staff for OPI-M. The trainings were, and continue to be, available to all staff who engage with individuals interested in OPI-M or who are currently receiving services through APD or an Area Agency on Aging (AAA). This includes, but is not limited to, case managers, eligibility workers, Aging and Disability Resource Connection (ADRC) staff, and support staff.

- Module 2: Financial Role and Policy
- Module 3: Part 1 - Financial Eligibility Criteria
- Module 3: Part 2 - Service Eligibility Criteria
- Module 4: Asset Verification Systems (AVS)
- Module 5: One System Navigation
- Module 6: Oregon ACCESS (OA) Documentation
- Module 7: Decision Notices and Hearings
- Module 8: Services Case Manager Responsibilities
- Tutorial 1: Case Manager Services Contacts
- Tutorial 2: Eligibility Case Manager
- Live Training: Eligibility Case Manager
- Live Training: Services Case Manager

Preparation of demonstration deliverables

In preparation for demonstration deliverables due throughout the quarter, APD worked with the Oregon Department of Human Services (ODHS) Office of Program Integrity, Quality Assurance (QA) Waiver Team on the HCBS Quality Improvement Strategy. APD also coordinated with the QA Waiver Team and Adult Protective Services on the HCBS Performance Measures. For the Quarterly Monitoring Report, the OPI-M Team worked together to prepare the report. For the Quarterly Budget Neutrality Report, APD collaborated with the Office of Financial Services.

Post-Award Public Forums

Not applicable for this reporting quarter.

Upcoming Activities

The following are upcoming activities.

- August 2024: Submit Evaluation Design
- August 2024: Post-Award Public Forum
- September 2024: Submit Quarterly Monitoring Report
- September 2024: Release additional staff training and resources
- October 2024: Public proposed rulemaking hearing

- October 2024: Submit Quarterly Budget Neutrality Report

Quarterly Expenditures

APD began to collect actual expenditure information for the second quarter of the first demonstration year. OPI-M implementation began June 1, 2024. Individuals started to receive services during July 2024. Expenditure data will be provided, once posted on the CMS-64, to CMS using the Budget Neutrality Monitoring Tool.

Overall Demonstration Development/Issues

The following is second quarter demonstration development and issues.

Operational/policy issues

OPI-M implementation began in June 2024, but cases did not begin to be approved until the middle of July 2024 due to initial outreach and new eligibility reviews. APD's primary challenge also continued to be with IT systems development. The issues identified caused 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 was hampered by IT barriers. Additionally, there were delays getting the necessary staff access to the AVS portal, and there were problems with AVS results not properly showing for staff. There were also issues with signature requirements. APD worked with the AVS vendor to help mitigate the AVS issues. Work with the IT Team was ongoing.

Financial/budget neutrality development/issues

For financial/budget neutrality development and issues, there were no identified issues.

Consumer issues

As OPI-M implementation began during the quarter, APD started to receive concerns from local offices regarding consumers declining OPI-M services. The issues were specifically around the financial eligibility process for OPI-M. Consumers found the financial eligibility process to be overbearing and intrusive. Some consumers did not want to consent for AVS and withdrew their application for OPI-M as a result. APD spoke to these concerns with local managers and case managers and began to discuss ways to overcome them. Additionally, even though estate recovery is waived for the demonstration, the requirement to have the state listed as a beneficiary on life insurance policies and trusts led to an extremely negative impact on enrollment.

Through consumer outreach, it was found that some consumers on the traditional OPI wait list were either no longer interested in services or already receiving other service benefits. There were also concerns from consumers, staff, and community partners about OPI-M not having access to medical transportation. During the quarter, APD began to turn its attention toward the concerns. The resolution will be shared in the next quarterly monitoring report.

Quality assurance/monitoring 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 second quarter of the first demonstration year.

Budget Neutrality

The Quarterly Budget Neutrality Report for DY1 Q2 will be uploaded into the PMDA system.

Demonstration website

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

You can get this document in other languages, large print, braille, or a format you prefer free of charge. Contact the Office of Aging and People with Disabilities by email at APD.Communications@odhsoha.oregon.gov. We accept all relay calls, or you can dial 711.