

Action Request Transmittal Aging and People with Disabilities



Jane-ellen Weidanz

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Number: APD-AR-23-010

Issue date: 4/13/2023

Topic: Long Term Care

Due date:

Subject: Incapacitated Adults and Public Health Emergency Unwinding

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: Type B | <input type="checkbox"/> Health Services |
| <input checked="" 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 (<i>please specify</i>): |
| <input type="checkbox"/> ODDS Children's Residential Services | |
| <input type="checkbox"/> Child Welfare Programs | |

Action required:

APD is taking a proactive approach to assisting consumers as the period of protected Medicaid eligibility established by the COVID-19 Public Health Emergency (PHE) begins to close. This includes identifying and documenting consumers who do not have the cognitive ability to complete the financial recertification process for medical programs required by the Centers for Medicare and Medicaid Services (CMS).

An annual financial redetermination for medical programs requires an interview with the consumer or the authorized representative. For consumers receiving Long Term Services and Supports, the interview can be waived for a consumer who:

- Does not have the cognitive capacity to complete the interview,
- Has been assessed as either substantial or full assist in Self-Preservation, Decision Making or both, and
- There is no other appropriate authorized representative to assist the individual.

The process to waive an interview during recertification still requires action from an eligibility worker (EW). Please see the [Who Can Complete the Application Process QRG](#) for additional information on waiving a recertification interview.

Case managers should identify all consumers on their caseloads who meet this criteria. This should be completed during direct and indirect contacts for consumers, or other case contacts for those that do not require monthly contacts (such as those receiving NF or SPPC benefits). Once the consumer has been identified, the determination should be documented in the ONE system through the Sticky Note feature (see instruction below). Case managers will need to create a sticky note in the ONE system with the following language:

"(Name, Prime) has been determined as a (substantial/full assist in one or more components of cognition) as part of a CAPS assessment. They do not have an authorized representative to assist with the medical redetermination process. Please waive the interview requirement for this consumer".

If there are consumers who do not meet the assessment criteria but are cognitively unable to complete the financial redetermination process and do not have an authorized representative, please reach out to Central Office for a case staffing. Please use the APD Policy box using a subject line of "Incapacitated Adult Determination Needed".

As we move through the unwinding process, case managers are **required** to check their Alert Log in the ONE system daily. Alerts will populate for consumers due for financial recertification and those who are losing medical benefits and therefore will lose service eligibility. Case managers must carefully look at alerts to ensure that any consumers meeting the cognition criteria are not on the list. Should they appear on the list, CMs will need to reach out to an EW following their established local process to ensure that the recertification is completed, and the interview is waived. Please see [APD IM 21-117](#) for additional information on the CM Alert Log.

These directions apply to new intakes and recertifications. The ability to waive an interview for an incapacitated adult is not specific to PHE Unwinding, rather an ongoing process. These consumers need to be tracked each year to ensure their medical benefits and therefore, their service eligibility continues.

Instructions for Adding a Sticky Note:

1. Locate the Sticky Notes on the Case Summary screen. It is in the Case Individuals section.
2. Click on the Sticky Note. A new window will open.
3. Add the needed information to the Note Details section.
4. Click Submit to save the Sticky Note.
5. If saved correctly, the number on the Sticky Note should increase by 1.

Case Summary

Expand All

Generate Returned Mail Task

Submit

Case: 402075486

Case Summary Information

Case#	Case Name	Case Mode	Case Status	Office Name	Office County	Branch Code
402075486	SSI CASE 72	Active	Approved	2402 - North Salem SSP	MARION	2402

Case Mode: Active
 Medical: Approved (Active)
 Upcoming Renewal: 01/31/2024

View Case Notes

Document Upload

Proceed To Verification

Continue Previously Selected Action

Perform Intake

Report a Change

Renew/Periodic Report

Non Eligibility Update

View

Add or Reopen Program

Outstanding Tasks

Select All	Task ID	Status	Action	Task Name	Queue Type	Assigned To	Due Date	On Hold Reason	On Hold Comments
No records found to be displayed.									

Assign to Me

Upcoming Appointments

Case Individuals

Name	Individual#	Prime#	SSN	Date of Birth	Spoken Language	Date Removed
SSI CASE 72	808493835	0	BA701S4K	[REDACTED]	05/05/1950	English

Associated Application

Sticky Notes



Individual Details

Name: SSI CASE 72 | Individual #: 808493835

Note Details

Note	Date Last Modified	Last Modified By	Action
Consumer name, prime, has been determined as a full assist in one or more components of cognition as part of a CAPS assessment. They do not have an authorized representative to assist with the medical redetermination process. Please waive the interview requirement for this consumer.			

+Record

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Reset

Submit

Reason for action:

When the COVID-19 pandemic began, the federal government established a Public Health Emergency (PHE). During the PHE, states were not allowed to terminate Medicaid coverage. This meant that Medicaid recipients with changes to income or resources that would normally make them ineligible were able to stay on Medicaid.

Effective April 2023, states are required to process an eligibility renewal for all

Medicaid recipients. In Oregon, these renewals will be initiated over a 10-month period, beginning April 2023. If the individual is found to be over income or resource limits for Medicaid when the case is renewed, their coverage can end.

Reason for action:

Field/stakeholder review: Yes No

If yes, reviewed by: Operations and Local Office Supervisor Review

If you have any questions about this action request, contact:

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