

# Information Memorandum Transmittal Aging and People with Disabilities



Mat Rapoza

**Authorized signature**

**Topic:** Long Term Care

**Subject:** New CM Tools Website Available Now

**Number:** APD-IM-24-114

**Issue date:** 11/8/2024

**Due date:**

## **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 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                           |   |

**Message:** CM Tools has been redesigned and is now on a new website:

<https://www.oregon.gov/odhs/providers-partners/seniors-disabilities/Pages/case-management.aspx#training>.

Staff should bookmark or save this page to their favorites. The new CM Tools page will be continually reviewed and updated to make sure it provides what staff need. The website is public facing and will not require any special login to access it.

Here is a video that provides a quick overview of the new CM Tools website:

<https://rise.articulate.com/share/jWqajpruLgIXI3SYcO206-9MjmrkkM4>

Effective November 15, 2024, the existing Case Management (CM) Tools pages (on OWL and the old pages) will be deactivated.

At the top of the page, you will find the following quick links:

- Find a form – This is a link to the forms server.
- Guides and manuals – This page lists all the APD guides and manuals that are also found on the various program/service specific sections.

- APD rules and rulemaking – This is a link to the APD rules page.
- SSP rules and rulemaking – This is a link to the OAR 461 rules (financial eligibility) page.
- Transmittals – This is a link to the APD transmittals page.

## Case Management tools and resources

Tools and resources for ODHS and Area Agency on Aging (AAA) staff providing case management services to Oregon's older adults and people with disabilities.

[Find a form](#)

[Guides and manuals](#)

[APD rules and rulemaking](#)

[SSP rules and rulemaking](#)

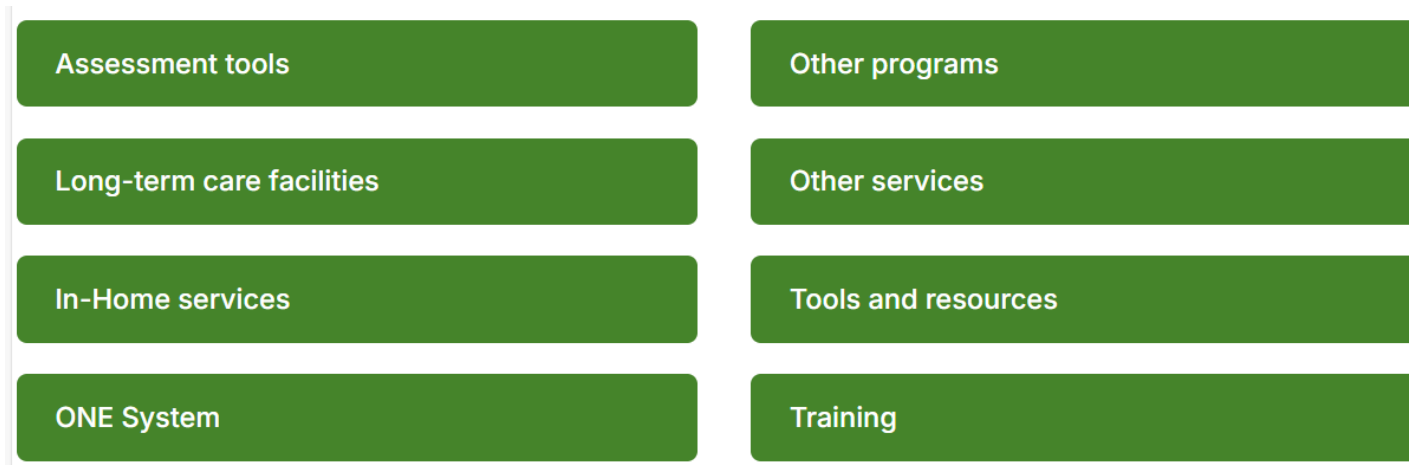
[Transmittals](#)

The next section includes the following pages with the subsections listed for each topic:

- Assessment tools –
  - Assessment Tools
  - Client Details, Treatment, Forms, and Misc. LTC Information
  - Exceptions
  - Oregon ACCESS and CA/PS
  - Risk Assessment
  - Service Planning
  - Service Priority Levels
- Long-Term Care Facilities –
  - Adult Foster Homes
  - Assisted Living and Residential Care
  - Facilities Information
  - Nursing Facilities and PAS
- In-Home services -
  - Consumer-Employer Responsibilities
  - Homecare Worker
  - Independent Choices Program
  - In-home Care Agencies
  - In-home Supports Services
  - Oregon Project Independence-Medicaid (OPI-M)
  - Provider Time Capture
  - Spousal Pay Program
  - State Plan Personal Care
- ONE System -
  - ETOPs
  - Medicaid Financial Eligibility and LTC/ONE Training
  - Operational Impacts


- QRGs
- Other tools
- Other programs -
  - Adult Day Services
  - Crisis Support
  - Diversion/Transition
  - Enhanced Care Services
  - Extended Waiver Eligibility
  - General Assistance
  - Healthier Oregon
  - Program of All-Inclusive Care for the Elderly (PACE)
  - Specialized Living
  - Specific Needs Contracts
  - Specific Needs Contracts Statements of Work
    - Adult Foster Homes
    - Assisted Living Facilities
    - Residential Care Facilities
    - Enhanced Care Services
- Other services -
  - Behavior Support Services
  - Emergency Response Systems
  - GrandPad
  - Housing Support
  - K-Plan Ancillary Services
  - Long-Term Care Community Nursing
  - Money Management Services
  - Tribal Navigator
- Tools and resources -
  - Complex Case Consultations
  - Hearings
  - Mental or Emotional Disorders Review
  - Provider Payments, Adjustments and Troubleshooting
  - Waiver Case Management
  - Assistive Device Resource Guide
  - Cash Payment Codes and Reasons
  - Client Information Disclosure
  - Continuous Improvement (CI) Sheet
  - Death Checklist for Case Management
  - Licensed Facility Search
  - Monthly Production Calendar
  - OR ACCESS Provider Search
  - OSIPM and MAGI Comparison Chart
  - Rate schedule
  - Secure email instructions
  - Zip code directory
- Training –
  - Training Unit (TUFSS)

- Case Manager Fundamentals
- Financial Eligibility Training Schedule
- Transmittals



The “Make a Request” section is where you will find the links for the following requests:

- Crisis Support Program
- GrandPad Request
- OPI-M Interest List
- OPI-M MMIS Request
- OPI-M Questions, Support, and Feedback
- Service Plan Extension Request
- SPPC MED Case Consult

 **Make a request**

- [Crisis Support Program](#)
- [GrandPad Request](#)
- [OPI-M Interest List](#)
- [OPI-M MMIS Request](#)
- [OPI-M Questions, Support and Feedback](#)
- [Service Plan Extension Request](#)
- [SPPC MED Case Consult](#)

On the right side of the CM Tools home page, you will find the following:

- Contacts
  - APD Medicaid Policy Email
  - APD Medicaid Program Analyst Contact List

# Contacts

---

## APD Medicaid Policy Email:

[apd.medicaidpolicy@odhsoha.oregon.gov](mailto:apd.medicaidpolicy@odhsoha.oregon.gov)

[APD Medicaid Program Analyst Contact List](#)

- Resources



- Aging and Disability Resource Connection (ADRC) information
- Center for Ethics in Healthcare
- Domestic Violence information
- Employer Resource Connection
- Long-Term Care Ombudsman
- Oregon POLST
- Senior Health Insurance Benefits Assistance (SHIBA)
- State Plan and Waivers
- State Plan for Alzheimer's Disease and Related Dementia's in Oregon

## Resources

---

- [Aging and Disability Resource Connection \(ADRC\) information](#)
- [Center for Ethics in Healthcare](#)
- [Domestic Violence information](#)
- [Employer Resource Connection](#)
- [Long-Term Care Ombudsman](#)
- [Oregon POLST](#)
- [Senior Health Insurance Benefits Assistance \(SHIBA\)](#)
- [State Plan and Waivers](#)
- [State Plan for Alzheimer's Disease and Related Dementia's in Oregon](#)

- Here are some tips and tricks for using the new APD CM Tools pages:

- You can click on the arrow  to the left of each subpage or the plus sign  to the right of each subpage to expand and collapse each section.



- Most pages include the following subsections:
  - Rules and transmittals
  - Manuals, guides, and tools
  - Forms
  - Training and other resources
- When clicking on the transmittals link on any of the subpages, you will be directed to the APD Transmittals page, where you will find transmittals that have been tagged with the specific program or service related to the topic on each page.
  - For example, when you click on the In-Home Care Agencies section of the In-Home services page and click on Transmittals, the Transmittals listed have all been tagged for the IHCA area.

[→ In-home Care Agencies](#) ×

**Rules and transmittals**

- [OAR 333-536](#) OHA
- [OAR 411-033](#) ODHS
- [Transmittals](#)

---

Search  Q × ≡ Sort ▼ ▼ Filter ▼

Area is one of: [IHCA](#) ×

Date	Transmittal	Subject	Summary	Status	Area
9/5/2024	<a href="#">APD-IM-24-090</a>	New In-Home Care Agency	New In-Home Care Agency - Caring for Columbia Gorge LLC	Active	<a href="#">IHCA</a>
8/1/2024	<a href="#">APD-IM-24-082</a>	New In-Home Care Agency	New In-Home Care Agency – Simply Care Oregon LLC	Active	IHCA

- When clicking on the search at the top of the page, you can search for a specific topic. Please note that this feature searches all the Oregon.gov pages. You will receive several hits allowing you to scroll to find the results that most apply to your search. Ideally, searches are done by first using one of the four categories at the top of the page, but if that doesn't work, the main search function can be used.

*If you have any questions about this information, contact:*

Contact(s): Christine Maciel - APD MSS Operations & Policy Analyst	
Phone:	Fax:
Email: Christine.C.Maciel@odhs.oregon.gov	