

Policy Transmittal Aging and People with Disabilities



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Number: APD-PT-24-016

Issue date: 6/21/2024

Obsolete date: 5/9/2025

Topic: Long Term Care

Due date:

Transmitting (check the box that best applies):

- New policy
 Policy change
 Policy clarification
 Executive letter
 Administrative Rule
 Manual update
 Other:

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 | |

Policy/rule title:	Using Oregon Project Independence (OPI) Assessments for Oregon Project Independence – Medicaid (OPI-M) During the Implementation Phase		
Policy/rule number(s):	OAR 411-014-0040	Release number:	
Effective date:	Upon release	Expiration date:	February 28, 2025
References:	Oregon Project Independence – Medicaid implementation plans.		
Web address:	CM Staff Tools for OPI-M		

Discussion/interpretation:

Please note: This transmittal has been updated to clarify two-year “Review Before” dates in Oregon Access (OA) are not yet available and “Title XIX” assessments completed in the past 90 days may also be used for OPI-M service eligibility if there are no changes to care needs. Changes are in red.

Oregon Project Independence – Medicaid (OPI-M) started a phased implementation on June 1, 2024, with an anticipated opening to the public on March 1, 2025. Eligibility Case Managers (ECM) determine an individual’s service eligibility for OPI-M in Oregon ACCESS (OA). This is done by completing a “Title XIX” assessment using the Client Assessment and Planning System (CA/PS) and determining the individuals service priority level (SPL).

During the OPI-M implementation phase, ECMs are working with individuals currently receiving Oregon Project Independence (OPI) services. OPI service eligibility is completed using the “OPI” assessment in OA. Service plans for OPI-M can only be created using a “Title XIX” assessment. ECMs must complete a new “Title XIX” assessment for individuals interested in moving from OPI to OPI-M services.

To assist ECMs with determining eligibility during the OPI-M implementation phase, the requirement for a new “Title XIX assessment” is temporarily suspended during the implementation phase if the case meets the following criteria:

- The individual is currently receiving OPI services, and started receiving OPI services no later than May 31, 2024; and
- The current “OPI” assessment was completed within the past 180 calendar days (six months); and
- The ECM has spoken with the individual or their representative and confirmed the individuals care needs are still accurately reflected in the assessment or any reported changes would not impact the individuals SPL.

If the criteria above are not met, a new “Title XIX” assessment must be completed. If met, the current OPI assessment can be converted to a Title XIX assessment and used for OPI-M eligibility and service planning.

Additionally, “Title XIX” assessments completed in the past 90 days may also be used for OPI-M eligibility when there are no changes to care needs. Further guidance on “Title XIX” assessments and timeframes is coming soon.

Important: “OPI” assessments converted to a “Title XIX” assessment for the purpose of OPI-M will fall under continuous eligibility (CE). ~~and the ECM needs to push the “Review before” date out one year, but the “Review before” month must not be changed.~~ These converted assessments will be used for 18 to 24-months from the month they were originally completed. ~~Until OA is updated to allow two-year “Review Before” dates, the “Review Before” date needs to remain one-year from the assessment completion date.~~

- Example: The converted assessment’s “Review before” date is June 2025. The assessment is converted on August 15, 2024, from “OPI” to “Title XIX”. The assessment ~~needs to keep the “Review before” date set as June 2025. Further guidance will be provided at a later date regarding adding the second year to the~~

benefit period. for OPI-M purposes, now shows a “Review before” date of June 2026 because CE applies for the individual receiving OPI-M services.

Implementation/transition instructions:

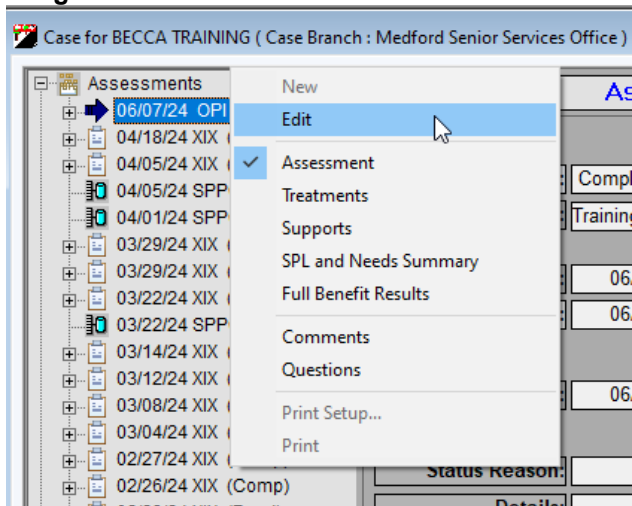
Converting an “OPI” assessment to a “Title XIX” assessment will require at least tier 2 rights in OA.

Important: Before an assessment can be converted, any current or previously ended service plan associated with the assessment needs to be invalidated. ECMs will want to ensure these actions are coordinated to prevent a gap in any services the individual is receiving.

To convert the assessment, the following actions must be taken:

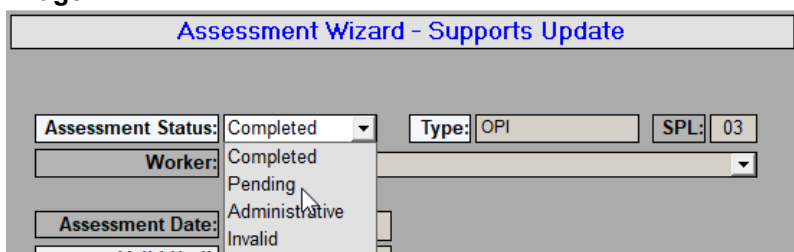
1. Right click the completed OPI assessment and select “Edit” (Image 1).

Image 1



2. Under “Assessment Status”, select “Completed”. This will produce a dropdown of options. Next, select “Pending” (Image 2).

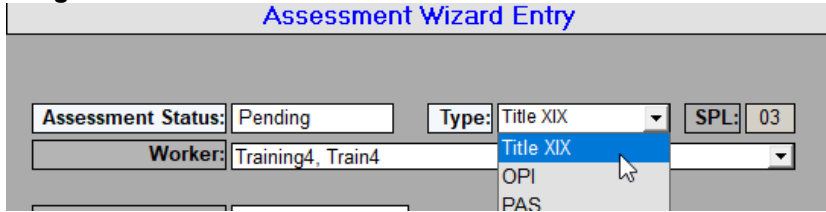
Image 2



- a. **Important:** Once in pending, do not make any changes to comments or assist levels.
3. Once in pending, under “Type”, select “OPI”. This will produce a dropdown of

options. Next, select “Title XIX” (Image 3).

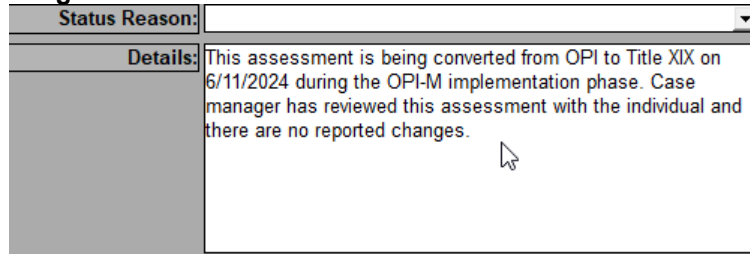
Image 3



4. Under “Details”, the following message must be added (Image 4).

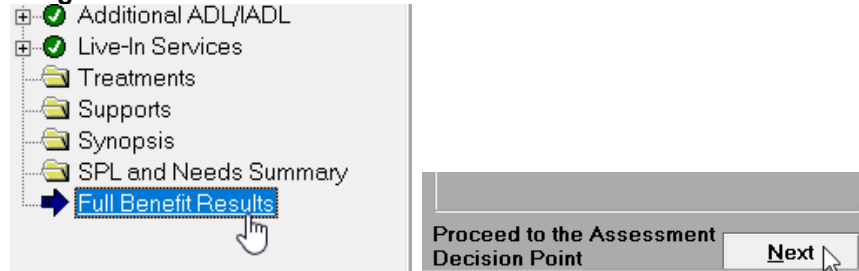
- a. This assessment is being converted from OPI to Title XIX on (date the change occurred) during the OPI-M implementation phase. Case manager has reviewed this assessment with the individual and there are no reported changes.

Image 4



5. In the left column, select “Full Benefit Results” and then click “Next” in the bottom right corner (Image 5).

Image 5



6. The “Full Assessment Decision Point” window will open. Select one of the actions to complete the assessment. ~~Change the “Review before” date. In this example, the previous date was June 2025. The new date will be June 2026. As noted above, the “Review before” month must not change.~~ Until OA is updated to allow two-year “Review Before” dates, the “Review Before” date needs to remain one-year from the assessment completion date. Further Guidance will be provided at a later date regarding adding the second year to the benefit period. Click “Next” to complete the conversion (Image 6).

Image 6

- Narrate the actions taken and the conversation with the individual or their representative, confirming the assessment continues to accurately reflect their care needs.

Once these actions are completed and the individual meets all other eligibility criteria for OPI-M, an OPI-Medicaid benefit may be approved in OA.

Training/communication plan: None.

Local/branch action required: Staff must familiarize themselves with this policy.

Central office action required: CO staff is available for technical support.

Field/stakeholder review: Yes No

If yes, reviewed by: Ops & Policy Review

Filing instructions:

If you have any questions about this policy, contact:

Contact(s): Submit OPI-M related questions, comments and feedback to [this form link](#). The link is also provided on CM Tools under the OPI-M section

Phone:

Fax:

Email: