

October 1, 2017 OPI Service Planning

September 14 and repeated September 26

Presented by: Sandy Abrams, OPI Program Analyst

Overview

- Big Picture
- Communication
- 14 day – 2 week service planning
- CAPS Assessment and service planning dates change
- HCW service plans
- In Home Agency service plans
- Converting the plan back to monthly for OPI Forms

Big Picture

The policy changes outlined below are subject to the ratification of a Collective Bargaining Agreement by SEIU members.

**CHANGE IS
HARD AT FIRST,
MESSY IN THE
MIDDLE AND
GORGEOUS AT
THE END**

ROBIN SHARMA

CHANGES

- **ADL Definitions and CAPS tool changes**

- OAR 411-015 is being amended effective October 1, 2017.
- Changing the frequency required to meet a nursing facility level of care.
- Changing the what kind of tasks drive eligibility for long term care services.

- **Medicaid In Home Hour Rebalance**

- **Medicaid Live-in to Hourly Service Transition**

- **Two week – fourteen day service plan authorization**

Communication

Consumer, HCW and OPI Staff

Notice to OPI Consumers

OPI Consumer Information notice should be sent by the AAA on their letterhead a month prior to the OPI reassessment regarding the Assessment changes.

Suggested OPI Consumer Information for the month prior to reassessment to be sent by the AAA.
Please print and use AAA letterhead

Before your upcoming Oregon Project Independence (OPI) service review (insert date or month) we wanted to tell you about some important changes to the assessment.

Assessment Changes
Oregon Long Term Care Services are designed to help people with high care needs who need assistance on a regular basis throughout a month. Aging and People with Disabilities has changed the rules about who can get OPI long term services and support. As an example, they are increasing the number of times a person needs help each month to qualify for services. They have also changed some of the tasks that are used to determine eligibility. This means some individuals will no longer be eligible for OPI funded services and supports.

These changes may impact you. Your OPI Service Coordinator will be able to explain the changes to you and the impact after your assessment.

If you are affected by either of these changes you will be told in writing. You will be able to request a grievance if you do not think we have determined your eligibility correctly. If you lose eligibility for OPI services you will receive your OPI rights and help with the transition off OPI services.

OPI Consumers

Some HCWs and consumers may think their hours are being reduced. Because, the hours appear lower and there are less days in a pay period.

Please help to explain this to them by explaining that in creating the two week service authorizations, APD rounded up the hours so that no consumer would receive less hours caused by the change.

For example, an OPI consumer who gets 10 hours a month (120 hours a year), will now have 5 hours per pay period rather than 4.6 hours; 26 pay periods in a year totaling 130 hours a year. A total increase of 10 hours in the year.

Notice to HCWs

APD IM 17-061

On 08/28/2017 an informational email was sent to homecare workers. It informed providers that they will soon be receiving a letter in the mail providing detailed information about the planned October 1, 2017 changes.

The letter also contained FAQ information sheet. It is included in IM 17-061

<Date>



Dear HCW or PSW:

We would like to share important information with you about an upcoming change that will affect when you are paid while working as a Personal Support Worker (PSW) for mental health consumers or as a Homecare Worker (HCW) for consumers with Aging and People with Disabilities through the Department of Human Services.

Beginning Sunday, October 1, 2017, service authorization periods (i.e., pay periods) will change to every 14 days (two weeks). Each week will begin on a Sunday and end on a Saturday. This will make it easier for you and your consumer-employers to create and follow a weekly schedule and track your time. It will also mean that your payments will process on the same schedule every pay period.

Your vouchers will look the same and you will follow the same process you do now when filling out your voucher. But voucher submission deadlines and pay processing dates are changing. It is very important that you follow the new payroll calendar you will receive so you are paid on time.

The vouchers for September 2017 and prior months' vouchers will be processed on October 16, 2017 and checks/EFT will be mailed/transferred on October 17, 2017, if the vouchers are turned in by October 4, 2017.

It is our goal to help make this a smooth transition for everyone. In the following pages you will find answers to questions you may have about this change.

To help answer any questions or concerns you may have, Aging and People with Disabilities has created a hotline that will be available September 15, 2017 through November 30, 2017. Please call 844-369-4164 during regular business hours. SEIU also has a Member Resource Center you call at 1-844-503-SEIU (7348). Thank you for being a HCW and helping consumer-employers to be as

"Safety, health and independence for all Oregonians"
An Equal Opportunity Employer

independent and safe as possible in their homes and communities. Aging and People with Disabilities values the work you do.

Sincerely,

Jane-ellen Weidanz

Jane-ellen Weidanz
Medicaid Long Term Services and Supports Manager
Aging and People with Disabilities

Due to timing of upcoming changes, we are providing you this information prior to ratification of the contract between SEIU and the State of Oregon. These changes are subject to final ratification by SEIU membership.

14 day – 2 week service planning

CAPS Service Planning

Date Changes

OPI forms

Change from Monthly to 14 day – 2 week service planning

- A work week is defined as 12:00 a.m. on Sunday through 11:59 p.m. on Saturday.
- A service period will be defined as two consecutive work weeks for a total of fourteen (14) days.
- System changes due to voucher changes
 - OACCESS updated
 - Mainframe updated
 - Maximum hour Adjustments OAR 411-030-0070
 - Service Mileage may need to be re-evaluated.

Oregon ACCESS

- OA will convert to the new two week authorization when one of the following occurs:
 - A new assessment and service plan is created.
 - The current benefit is ended and a new one is started.

Oregon ACCESS

- Staff are not required to update the service plan in OA until a new assessment and service plan is created.
- However, if a service plan needs to change before an assessment occurs, there are two options

Oregon ACCESS

- End the current Benefit Plan effective the day before the change is occurring and begin a new Benefit Plan effective the day the change is effective.
 - For example, a new provider is starting for the consumer on October 15. In this case, the following action would be taken:

Benefit Eligibility and Service Planning				
Assmt Date: 08/01/2017		Valid until: 08/31/2018		
☐	Benefits			Ben Act
Service Category/Benefit	Begin Date	End Date	Status	
OPI	08/01/2017	10/14/2017	Approved	
OPI	10/15/2017	08/31/2018	Pending	

In Home maximum hours that will show in CAPS service planning

See PT 17-031

- Old=Maximum hours per ADL/IADL prior to October 1, 2017.
- New=Maximum hours per ADL/IADL on or after October 1, 2017.

Mobility				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	25	20	12	9
Sub	15	10	7	5
Min	10	5	5	2

Eating				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	30	26	14	12
Sub	20	13	9	6
Min	5	6	2	3

Bathing				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	25	20	12	9
Sub	15	10	7	5
Min	10	5	5	2

Dressing				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	20	14	9	6
Sub	15	7	7	3
Min	5	3	2	1

Elimination				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	25	30	12	14
Sub	20	20	9	9
Min	10	10	5	5

Cognition				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	20	26	9	12
Sub	10	13	5	6
Min	5	7	2	3

Maximum Hours of Service

The comparison chart indicates the maximum hours of service in a monthly and service period format (which consists of two work weeks or 14 days):

Housekeeping				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	20	20	9	9
Sub	10	10	5	5
Min	5	5	2	2

Breakfast/Lunch				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	12	10	6	5
Sub	8	5	4	2
Min	4	3	2	1

Shopping				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	6	6	3	3
Sub	4	4	2	2
Min	2	2	1	1

Dinner				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	24	14	11	6
Sub	16	7	7	3
Min	8	4	4	2

Medication Management				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	6	10	3	5
Sub	4	5	2	2
Min	2	3	1	1

Transportation				
Assist Level	Monthly		14 Day Service Period	
	Old	New	Old	New
Full	5	5	2	2
Sub	3	3	1	1
Min	2	2	1	1

Oregon ACCESS

Creating a new benefit the new hours after the assessment hours are for 14 days using the updated rules.

CAPS Service planning, Hours Segments, view details

Hours Authorization Segment

In Home Hours		Status: Approved	Begin Date: 10/01/2017		End Date: 07/31/2018			
Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason	
Live-In	Live-In Services	Indep	0	0	0	0		
ADL	Bath/Personal Hygiene	Substantial	5	2	3	0	Natural Support	
	Bowel/Bladder	Substantial	9	2	7	0	OPI Program	
	Cognition	Full	12	3	9	0	OPI Program	
	Dressing/Grooming	Minimal	1	1	0	0		
	Mobility	Substantial	5	2	3	0	OPI Program	
I/ADL	Breakfast	Substantial	2	0	2	0	OPI Program	
	Dinner / Supper	Full	6	0	6	0	OPI Program	
	Housekeeping	Full	9	4	5	0	OPI Program	
	Lunch	Full	5	0	5	0	OPI Program	
	Medication Management	Full	5	1	4	0	OPI Program	
			ADL	ADL	ADL	IADL	Live-In Services	
Total Allowed Hours			0	0	10	5	0	
Total Exception Hours			0	0	0	0	0	
Total Authorized Hours			0	0	10	5	0	

Hours Authorization Segment

In Home Hours		Status: Approved	Begin Date: 02/01/2017		End Date: 12/31/2017			
Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason	
Live-In	Live-In Services	Indep	0	0	0	0		
ADL	Bath/Personal Hygiene	Substantial	15	10	5	0	Natural Support	
	Bowel/Bladder	Minimal	10	5	5	0	OPI Program	
	Cognition	Substantial	10	5	5	0	OPI Program	
I/ADL	Dinner / Supper	Minimal	8	5	3	0	OPI Program	
	Housekeeping	Substantial	10	5	5	0	Natural Support	
	Lunch	Minimal	4	0	4	0	Natural Support	
	Medication Management	Minimal	2	2	0	0		
	Shopping	Substantial	4	0	4	0	OPI Program	
	Transport	Minimal	2	0	2	0	OPI Program	

Hours Authorization Segment

In Home Hours		Status: Approved	Begin Date: 10/01/2017		End Date: 07/31/2018			
Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason	
Live-In	Live-In Services	Indep	0	0	0	0		
ADL	Bath/Personal Hygiene	Substantial	5	2	3	0	Natural Support	
	Bowel/Bladder	Substantial	9	2	7	0	OPI Program	
	Cognition	Full	12	3	9	0	OPI Program	
	Dressing/Grooming	Minimal	1	1	0	0		
	Mobility	Substantial	5	2	3	0	OPI Program	
I/ADL	Breakfast	Substantial	2	0	2	0	OPI Program	
	Dinner / Supper	Full	6	0	6	0	OPI Program	
	Housekeeping	Full	9	4	5	0	OPI Program	
	Lunch	Full	5	0	5	0	OPI Program	
	Medication Management	Full	5	1	4	0	OPI Program	

Comparison screen shot example prior to 9/30/17 (monthly authorizations)

Screen shot example after 10/1/17 changes (two week authorizations and rebalancing of Medicaid In Home Maximum hours):

Oregon ACCESS & Mainframe

- updated
- As indicated in the APD-IM-17-059 and IM 17-066, ONGO records having existing vouchers scheduled to issue past 9/30/17 will be converted to the new service period format beginning 10/1/17. The system implementation to support two week service authorizations will be available for use on 9/25/17. The new ONGO voucher will start October 1st to October 14th. The second will start on October 15th to October 28th.
- Oregon ACCESS will still display the monthly hour format in the Hours segment. However, the Mainframe will need the two week service period hours.

OPI Service Plan Hours

Tool that will convert the 14 day hours to monthly.

or

Converts the monthly to 14 day.

Both calculations show hours without rounding up and annual hours.

updated

OPI Service Plan Hours			
10/1/2017			
14 day service plan hours are known, what are the monthly and annual hours			
	Total 14 Day Hours	Monthly Hours	Annual Hours
Please enter the 14 Day Hours Here	8	17.33	208
		Monthly Hours (including 2 decimals) = pay period hours times 26 pay period in one year divided by 12 months	
Monthly Hours, what are the pay period hours and annual hours			
	Monthly Hours	Hours Per 14 Day Pay Period	Annual Hours
Please enter Monthly Hours (by whole number)	17	7.82	208
		Pay Period hours (rounded up to nearest whole hours) = monthly hours times 12 months, (annual hours) divided by 365 days times 14	

Oregon ACCESS & Mainframe

Carefully review the current hours assigned to each HCW in the mainframe, HINQ,R,prime to compare against the auto conversion that took place 9/25/17 for 10/1/17. If the hours on HINQ exceed the hours in the updated service plan, either increase hours in OA or update plan to show plan change for less hours. See IM 17-066 for details.

HINQ R, In-home Service Claim List 09/13/2017

View Current N

VCH NMBR	PRCS TRANS	PRIM ID	RECIP NAME	PROV NMBR	PROV NAME	SERV BEG	SERV END	CHK DATE	EFT REJ	PAID
30						170916	170930	000000		.00
30						170901	170915	000000		.00
35						170816	170831	000000		136.61
36						170801	170815	170830		136.61
36						170716	170731	170815		136.61
36						170716	170722	170831		.70
36						170701	170715	170728		136.61
36						170616	170630	170718		136.61
36						170601	170615	170630		136.61
36						170516	170531	170615		136.61
36						170501	170515	170531		136.61
36						170416	170430	170512		136.61
36						170401	170415	170428		136.61
36						170316	170331	170414		136.61
36						170301	170315	170330		136.61
36						170301	170304	170331		2.06
36						170226	170228	170331		4.12
36						170216	170228	170315		136.61

MSG 101 Top of display.
F3=EXIT F8=NEXT F11=HINV

HINQ R, In-home Service Claim Detail 09/13/2017

Upd 09/06/2017 RACF Wkr Id JW

Cre 08/08/2017 RACF Not on file Msg

Vch Nmb 00000000 Prcs Trans 35 Msg IN READY TO PAY STAT-REGULAR RA Nmb 00000000

Vch Xref 00000000 Chk Date 00/00/00 Chk Nmb 00000000

ICN 00000000000000 Pay Ref 00/00/00 Vch Adj N EOB 000

X Ref (ICN) 00000000000000 BR 7610 Prnt 598B 17/08/08 Mail Br N

Prim Id Prov Nmb

Recip Name Prov Name

Days Work Per Wk Prov Addr

Svc Cat OPI Prov Str

Lst Work 00/00/00 Prov City/ST

Authorized Beg 17/08/16 End 17/08/31 Beg 17/08/16 End 17/08/31

Units Rate Total Units Rate Total

OP334 Hourly ADL/IADL 12.50 14.5000 \$181.25 12.50 14.5000 \$181.25

F3=EXIT F7=PRV F8=NXT F10=SVC F11=DTL F12=HINQ F22=ADJ F23=PAY

546 Details

Financial Task List Service Rates

Service Mileage Authorized:

Remarks: OPI; 20% copay

Monthly hours ADL 14, IADL 2; 16 hours total

OPI staff will continue to add to the 546 remarks that the plan is for OPI or the OPI Expansion Pilot so that services can be properly charged. For in home care agencies it is recommended that in the 546 remarks section the number of **monthly** hours for ADL and IADL services for the agency to clarify as the 546 is authorizing hours only for 14 days. Other comments may be required by local AAA office processes.

STATE OF OREGON
DEPARTMENT OF HUMAN SERVICES
SENIORS AND PEOPLE WITH DISABILITIES

In-home Service Plan

For period 10/01/2017 through 09/30/2018

Page 1 of 1
Sep 13 2017

Section 1: Client

Name: **FOUR OPI**

Address: 357 Fourth Ave S

City and State: Salem OR

Phone: 947-555-3167 Zip code: 97301 Initial(s): D

Section 2: Provider

Name: **ADDUS HEALTH CARE**

Address: SALEM OR

City and State: 503-364-6443 Zip code: 97302 Prime: ☐ Provider:

Section 3: Remarks

OPI; 20% copay

Monthly hours ADL 14, IADL 2; 16 hours total

Section 4a: Hours and Rates Auth. Per Pay Period: 10/01/2017 - 09/30/2018

Type	Hours	Rate	Total
ADL:	7	\$ 0.00	\$ 0.00
IADL:	1	\$ 0.00	\$ 0.00
Service Mileage Auth:	0	\$ 0.485	\$ 0.00
Section 4b: Authorization			
TOTAL Hours:	8		\$ 0.00

Worker/Unit manager

Section 5: Other Providers

Date

HCW Service Plan Date Changes

In Home Benefit Approval Deadline
9/22/17
10/20/17
11/15/17
12/15/17
1/11/18
2/9/18
3/23/18
4/20/18
5/18/18
6/15/18
7/13/18

CAPS Assessment Reviews

Assessment and service plans must be completed prior to the ONGO auto print for the HCW vouchers. For those OPI cases, reviews will need to be done by these dates. See HCW Payroll Calendar on the APD CM Staff Tools October 2017 changes for the complete calendar and list.

Service Plan Date Changes

CAPS 2 - Assessment Review report (For Period: 02/01/2018 To: 02/28/2018)

Date: 09/25/2017

; Aging and People with Disabilities

amber	Current Living Situation	Med Case Status	Review Date	Assmt. Type
	Apartment	Approved	02/28/2018	OPI
	House		02/28/2018	OPI
	Apartment		02/28/2018	OPI

3

If these consumers use a HCW, you will need to have the Assessment and Plan complete by the In Home Benefit Approval Deadline

update

HCW Service Planning Example

Service Category/Benefit	Begin Date	End Date	Status
OPI	11/01/2017	07/31/2018	Approved
OPI	07/27/2017	10/31/2017	Approved

Hours #	Begin Date	End Date	Status	Alwd	Excp
1	11/01/2017	07/31/2018	Approved	10	0

In this example, the HCW will not receive a voucher for the pay period October 29 – November 11. This is because the benefit end date is October 31

HCW Service Plan Changes

In order for the HCW to receive a voucher, the benefit dates must cover the entire pay period. One of the following actions must take place:

- A Tier 2 user (such as a manager or lead worker) must extend the benefit out; or
- Complete a new assessment and service plan prior to the start of the pay period that is crossing into next month (preferred).

Service Plan Changes

Assessment Status: Administrative Type: Title XIX SPL: 03

Worker: [Dropdown]

Assessment Date: 10/12/2016

Valid Until: 10/31/2017

Review Before: Oct 2017

Status Reason: To Provide Adequate Notice

Details: Two Weeks - 11/1/17-11/11/17

Enter 'Two Weeks' in the Details Section.
11/1/17 – 11/11/17

If a Tier 2 user needs to extend the benefit out, put the assessment in ADMIN status and use the reason 'To Provide Adequate Notice' (A better long term solution will be developed in the future).

Service Plan Changes

Approve the benefit through the end of the pay period. In this example, the pay period ends on 11/11/2017.

Assmt Date: 10/12/2016		Valid until: 10/31/2017		Admin End Date: 11/30/2017	
Benefits		Ben Act			
Service Category/Benefit		Begin Date	End Date	Status	
APD-In Home		11/01/2017	11/11/2017	Pending	
APD-In Home		10/16/2017	10/31/2017	Approved	

When this action is taken, the benefit start date from a new assessment will need to begin the day after this benefit ends. In this example, the benefit date on the new assessment must start on **11/12/17**.

Service Plan Changes

When developing a new service plan from a new assessment that involves an in-home services:

- The begin date must begin the day after the previous one ended.
- The end date must be at the end of a pay period.

Assmt Date: 10/12/2016		Valid until: 10/31/2017		Admin End Date: 11/30/2017	
Benefits		Ben Act			
Service Category/Benefit		Begin Date	End Date	Status	
APD-In Home		11/01/2017	11/11/2017	Pending	
APD-In Home		10/16/2017	10/31/2017	Approved	

Using the previous example, since the last benefit ended on 11/11/17, the new benefit will begin on 11/12/17. The end date of the benefit shall be the last full pay period of the month.

Service Mileage

APD PT 17-oXX

Financial	Task List	Service Rates
Service Mileage Authorized: 20		

- Previously displayed as 'Mileage Authorization per Month'. You may need to update the authorized mileage as appropriate for the new 14 day pay periods.
- Any mileage reimbursement authorized to a homecare worker must be based on an estimate of the maximum miles per service period required to drive to and from the destination(s) authorized in the service plan.

Monthly hours for OPI Forms and OPI Consumer Fees

Continue to use the OPI Service Agreement (SDS 0287L) and the OPI Income/Fee Determination Record (SDS 0287K). The monthly tool can be used to calculate the monthly hours from the 14 day plan to determine consumers monthly OPI cost. The total monthly cost should be updated on the OACCESS Benefits, Service tab in the OPI Mon Fee and the OPI Fee % boxes

The screenshot shows the 'Service' tab in the OACCESS system. The 'Service Benefit Detail' section includes fields for Case Nbr, Med Prog, LDS Amt, Service Request Date, and WC Consent. Below this, the 'Service Benefit Applicant(s)' section shows the Person as 'OPI CLIENT', Case Action as 'Approved', Action Eff. Date, Elig Start Date, Admin Rule And Reason for Action, and Prime #. At the bottom, the 'OPI Mon Fee' is set to 18.20 and the 'OPI Fee %' is set to 20.00. A red circle highlights these two fields, and an arrow points from the text above to the 'OPI Fee %' field.

Required Training and tools

AR 17-051

- October HCW Voucher Changes Webinar. All Case Managers and identified Staff that issue, authorize, or answer questions regarding vouchers are **required** **
- ADL Definitions Webinar (All Case Managers and identified Staff that complete CA/PS assessments are **required** 9-27 **)
- OPI Service Planning Webinar (OPI Case Managers and identified Staff that complete CA/PS assessments are **required** 9-26 **)
- October Changes Training in iLearn (All identified Staff above are **recommended for review, Cognition, Physical ADL and Medicaid Service Planning** available in October.
- **APD October Changes Support Conference Calls** (All identified Staff above are **recommended** OPI –Wednesdays 1:30-2:30 thru 11-1)
- **APD October Changes Support Conference Calls:** Vouchers, for those that Authorize, Issue or answer questions on vouchers – Wednesday from 3-4, starting 9-27.
- ** recorded and located at:
<http://www.dhs.state.or.us/spd/tools/cm/October%202017%20Changes/index.htm>

Feedback

During the transition of these changes, please send questions to the following emails:

OPI/Non-Medicaid:
OPI.POLICY@dhsosha.state.or.us

- Sandy Abrams, OPI Program Analyst
503-947-2391
sandy.h.abrams@state.or.us