



Oregon Project Independence

Monthly Power Hour

OPI Power Hour

04/21/2022



OPI Information and Updates

Presenter:

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Community Services and Supports Unit - Oregon Project Independence



Topics today will include:

- Transmittals
- PTC Transmittals
- OPI Questions and Answers
- OPI-M update

APD-AR-22-020 Continuation of work in APD/AAA

- AAA Types: A & B
- APD/AAA local offices have resumed direct services for consumers.
- Local office staff may ask questions to screen for COVID-19 symptoms when setting up a home visit.
- Masks are required when in a consumer's home.

APD-IM-22-035 Required Refresher Training Due Date Extended to June 30, 2022

- AAA Type: A & B
- Required refresher training for HCWs has been extended to June 30, 2022.
- Central office will begin the termination process after June 30, 2022 for workers who do not complete refresher training. There will be no additional extensions.
- Encourage workers to check their training completion status in Carewell's learning management system.

APD-AR-22-022 PTC Provider Referrals

- AAA Types: A & B
- PTC needs your help to identify providers who may need additional assistance with OR PTC DCI and would benefit from an individualized learning session.
- PTC Provider Referral Form
- **Referrals due May 13, 2022.**

APD-IM-22-030 PTC Fob Process Updates

- AAA Types: A & B
- Fob return process is changing
- Local office – test the fob to confirm it is defective.
- If fob is defective, unlink the fob from the consumer's profile and mail it to PTC support.
- Fobs are linked to the **consumer's** profile.
- See full transmittal for detailed instructions.

APD-IM-22-032 Updating OR PTC DCI Profiles

- AAA types: A & B

Shared email addresses

- Each Consumer and Provider profile in OR PTC DCI requires a unique email address in order to allow individuals to properly utilize the Forgot Password functionality.
- If the user does not have a valid email address, they will not be able to use the “Forgot your password” functionality.

APD-IM-22-032 Updating OR PTC DCI Profiles (continued)

What if you notice the consumer and provider share an email address?

- Contact the Consumer or Provider to determine if the email belongs to one person and explain that each account needs to have a unique email for security purposes and system functionalities.
- Providers are required to have an active email address to complete their Carewell training. See if they have another valid email address they can use for OR PTC DCI.
- Consumers are not required to have an email address on file to sign off on their time in OR PTC DCI.
- Consumers and Providers can update their own email addresses in OR PTC DCI.

APD-IM-22-032 Updating OR PTC DCI Profiles (continued)

What if a name correction is needed in OR PTC DCI?

- Consumers and Providers are the only ones who can change their own usernames BUT staff members are the only ones who can update/change a Consumer or Provider's displayed first and last name.

Phone number reminders

- The Consumer's primary phone number should **only** be a landline or VOIP phone number as this number is connected to the Phone EVV option. If they do not have a landline or VOIP number, the primary number should be (000) 000-0000.
- Providers can have a cell phone, landline, or VOIP as their primary phone number in OR PTC DCI.

APD-IM-22-033 Consumer Phone Numbers in OR PTC DCI

AAA Types: A & B

Please note that this information only affects your Consumers who use Phone Electronic Visit Verification (EVV) (i.e., the Landline option).

- To be EVV compliant, the Provider must make the call from a phone that is fixed in the Consumer's home, such as a landline or VOIP.
- The Client "Phone" field of OR PTC DCI is to be used for Landline or VOIP phone numbers only.

APD-IM-22-033 Consumer Phone Numbers in OR PTC DCI (continued)

- The PTC Team will be using a [Phone Validator](#) to determine whether each Consumer's primary number is a Landline, VOIP, or cell. **Any primary phone numbers determined to be cell phone numbers will be moved to the Mobile Number field in the Consumer's profile.**
- When entering a new Consumer's information in Oregon ACCESS, make sure "Home Phone" is being used for landlines and "Cell Number" for mobile phone numbers to reduce errors during OR PTC DCI profile set-up.
- If you have a Consumer whose landline or VOIP number was moved to the Mobile Number field, but their Provider is using Phone EVV with that phone number, the case manager must confirm that the number is indeed a landline phone number. **Do not change the number in OR PTC DCI until the information has been verified.**

APD-IM-22-033 Consumer Phone Numbers in OR PTC DCI (continued)

Follow these steps to verify the phone is a landline:

1. Obtain either a phone bill, photo of the landline or VOIP phone, visual confirmation of the phone being a landline (e.g., a home visit), or other physical confirmation. The confirmation does not need to be printed or saved in EDMS. (**Note:** a verbal statement from the Consumer DOES NOT meet the requirement).
2. Create a Note on the Consumer's profile stating, "The Landline phone number ***-***-**** was confirmed with {state the method of confirmation} on MM/DD/YY."
3. Change the Phone field back to the confirmed landline or VOIP phone number.

PTC CEP Summit

- For HCW voucher staff
- 2 sessions available, the same content will be covered at both.

Dates & Times:

- Tuesday 5/10/22 1:00PM – 4:30PM
or
- Wednesday 5/11/22 8:30AM – 12:00 PM

Register via Workday.

OPI Question #1

Where should I enter a date of death? Is there more than one place?

Why is this important?

The date of death is used as the final date for provider payments. No provider can be paid after the consumer's date of death.

OPI Answer #1

Start backwards in Oregon ACCESS.



- Narrate
- End the benefit, hours, plan and limitations with the date of death.

☒ **End Benefit, Hours, Plan and Limitations**

Current End:

OPI Answer #1 continued

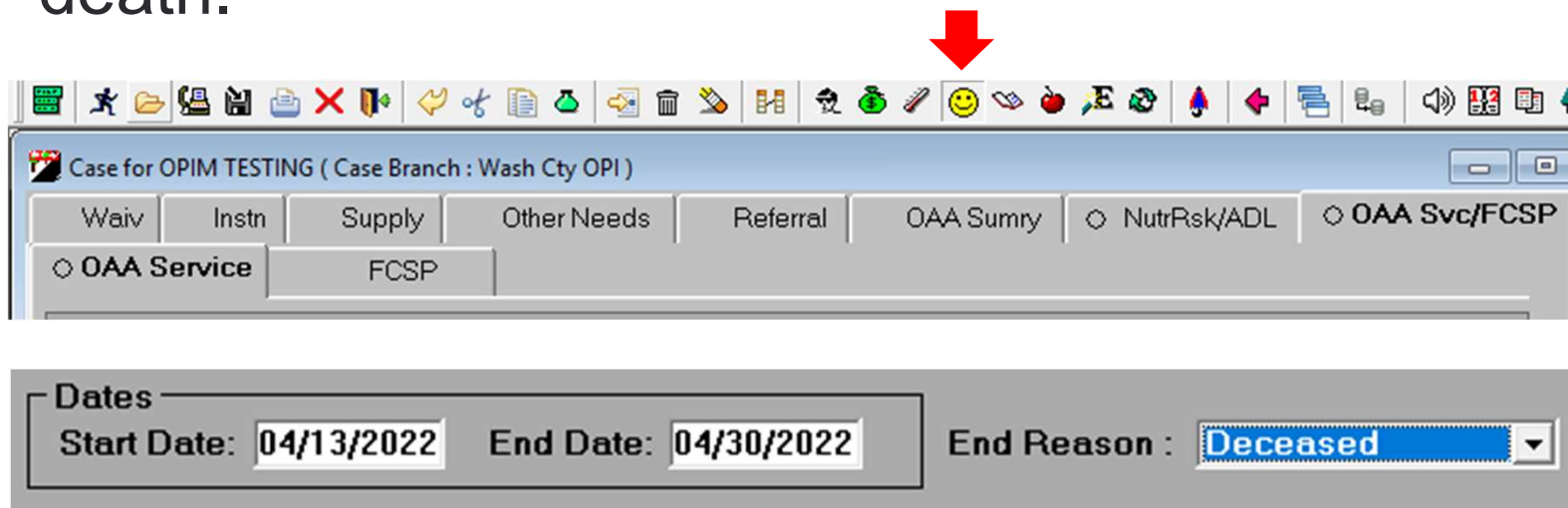
The end date for the entire service plan should now show the date of death.

Benefits				Ben Act
Service Category/Benefit	Begin Date	End Date	Status	
OPI	04/13/2022	04/20/2022	Ended	



OPI Answer #1 continued

End all OPI services under OAA service with the **last day of the month** regardless of the date of death.



The screenshot shows a software interface for OPI services. At the top, a toolbar contains various icons, with a red arrow pointing to a smiley face icon. Below the toolbar is a window titled "Case for OPIM TESTING (Case Branch : Wash Cty OPI)". Inside the window, there are several tabs: "Waiv", "Instn", "Supply", "Other Needs", "Referral", "OAA Sumry", "NutrRsk/ADL", and "OAA Svc/FCSP". The "OAA Svc/FCSP" tab is selected. Below the tabs, there is a section labeled "Dates" with two input fields: "Start Date: 04/13/2022" and "End Date: 04/30/2022". To the right of these fields is a dropdown menu labeled "End Reason : Deceased". A green arrow points to the "End Date" field.

OPI Answer #1 continued

Enter the death date on the main screen



Live in:	Apartment	Death Date:	04/20/2022	Stay in Oregon:	☐
Marital:	Never Married	Lang Spoken:	English	Spouse is or was a vet:	☐
Race:	Asian/White	Lang Read:	English	Unpaid medical bills:	☐
Ethnicity:	Not - Hispanic or Latino	Alt Format:	None	CAM:	☐

OPI Question #2

What should I do in OR PTC DCI if a TXIX assessment needs to be done in Oregon ACCESS and I have to transfer the case to the APD branch?

Why is this important?

Consumers who are applying for Medicaid need to have their cases in the appropriate Oregon ACCESS branch to complete a CAPS. The OR PTC DCI cost center needs to match the OPI branch that is responsible for HCW payment.

OPI Answer #2

- Nothing!
- Transfer the OA case to APD so that they can complete the TXIX CAPS.
- Don't make any changes to OR PTC DCI or the voucher in HostExplorer.
- Your branch will continue to manage the punch entries in OR PTC DCI and pay the voucher until TXIX eligibility is determined.
- Once TXIX eligibility is determined, follow the process to coordinate the closure of OPI in OA and OR PTC DCI.

OPI Question #3

Can an OPI case be closed for failure to hire a HCW?

By leaving an OPI case open without the services of a HCW (or other paid service), there is no benefit to the consumer.

Why is this important?

An OPI goal is to provide services to frail and vulnerable adults who are lacking or have limited access to other long-term care services. For areas that have a waitlist, keeping an individual on a caseload ties up funding.

OPI Answer #3

No. OPI rules do not support closing a case for failure to hire a HCW.

- Have a conversation with the consumer to see if they would consider voluntarily withdrawing from OPI since they aren't receiving any paid services.
- The conversation could include explaining there is a waitlist, and it is taking services away from others.
- Letting the consumer know they can reapply at any time in the future.
- The consumer could also be added back to the waitlist or a follow-up for I&R to be contacted in the future.

OPI Answer #3 continued

If the consumer still wants to remain on OPI, you must keep them open.

- At the annual reassessment, the consumer will have to clearly identify how they have met their needs within the assessment timeframe.
- This should be factored in and captured in the CAPS comments.

OPI-M Updates

- Oregon Administrative Rule writing has begun for OPI-M. Draft reviews will begin May 5, 2022.
- Training Unit for Services and Supports (TUFSS) has started developing updated online training modules.
- Policies, procedures, training guidelines, business processes, work-flow charts are all being created.
- Budget amounts have been provided to APD and AAAs.



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General OPI Policy Questions

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