OREGON DEPARTMENT OF
Human Services

Point of Contact Toolkit

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Overview

This toolkit was collaboratively created and completed by a workgroup consisting of leadership, policy and operations analysts, case managers and eligibility workers from:

- Area Agency on Aging (AAA)
- Community Developmental Disabilities Programs (CDDP)
- Office of Developmental Disability Services (ODDS)
- Oregon Eligibility Partnership (OEP)
- Support Services Brokerages

The group's goal was to address communication challenges that led to fragmented coordination, delays in service delivery, and missed opportunities for collaborative problem-solving. Together, they identified solutions to improve communication and collaboration between I/DD services and medical eligibility programs and created tools to support consistent and timely coordination:

- The ODDS and OEP Cross-Program Terminology Guide
- The Point of Contact Toolkit
- The Collaboration Meeting Leadership Toolkit.

By using these tools, teams can improve communication and collaboration across programs, ensuring accurate outcomes and supportive service delivery for individuals with intellectual or developmental disabilities who are applying for or receiving long-term care services.

Purpose of the toolkit

The Point of Contact Leadership Toolkit provides guidance for local leaders representing:

- Oregon Eligibility Partnership (OEP)
- Area Agency on Aging (AAA)

- Support Services Brokerages
- Community Developmental Disabilities Programs (CDDP)

It is designed to help local teams establish and sustain the new Point of Contact Inbox guidance to support timely and accurate information sharing while accommodating the unique operational needs of each geographic area. Its purpose is to:

- Provide guidance to establish a point of contact.
- Share ongoing guidance to strengthen communication practices and cross-program coordination.
- Provide optional tools and templates to support implementation and continuous improvement.

Establishing the Point of Contact

Recognizing variations in long-term care experiences and agency presence across the state, this toolkit provides guidance to establish an email point of contact for all OEP/AAA medical eligibility offices and ODDS CME offices. Below are guidelines and recommendations for successful implementation of a local Point of Contact.

Local implementation guidance

Establishing a Point of Contact will strengthen cross program coordination in your local area. Identify a local leader who will take on the role of implementing a point of contact by:

- Identifying a shared email inbox for communications.
- Ensuring daily monitoring of inbox activity.
- Ensuring emails receive a timely response by knowledgeable staff.

Identify an email inbox

Each local office or agency must identify a shared email inbox, or request a new shared email inbox, to serve as the initial point of contact for communication between I/DD services and medical program teams.

- Use a consistent subject line so emails are easy to recognize, for example “I/DD Services and Medical Coordination”.

- All agencies, including CDDPs and Brokerages, will send their point of contact email address to odhs-oep.central.coordinations@odhs.oregon.gov so it can be added to the ZIP Matrix and other CME directories.
- This guidance is being provided to CMEs through the ODDS Transmittal.

Daily monitoring

Ensure the point of contact email inbox is reviewed daily by a designated staff member who can process or route emails to the appropriate support for a timely response.

Timely response by knowledgeable staff

By identifying at least two staff members with experience and knowledge to respond to inquiries, you can ensure emails receive consistent and accurate support.

- Ensure staff are aware of communication practices related to the point of contact email inbox.
- Create a staff coverage plan to ensure daily monitoring and timely responses.
- Responses should be sent within the ODHS Customer Service policy time frames (ODHSOHA 010-033 Customer Service and Response Policy).

Cross program communication

Cross program communication is important to providing consistent support to individuals applying for or receiving I/DD services.

Using the point of contact

The point of contact shared email is the first step for staff to communicate across programs in routine situations.

If the situation cannot be resolved through email, or is time sensitive, staff should use the available directories to make a phone call to the appropriate local agency or office.

Information sharing

Ensure staff understand when it’s appropriate to reach out across programs and what information can be shared between partnering agencies.

- Information sharing between OEP, AAAs, Brokerages and CDDPs is allowed without any additional forms or permissions to coordinate benefits and services.
- Information can be shared to the **minimum necessary standard** to coordinate care between partnering agencies.
- See the OEP-IM-25-014, DD-IM-26-007 for additional details and guidelines.

Supporting handoffs

Given the number of offices and agencies supporting services and financial eligibility for individuals with I/DD, it is likely there will be times when an email is sent to the wrong point of contact. Please provide necessary support to ensure a timely handoff to the appropriate agency's point of contact.

See Resources for links to cross program directories

Ongoing guidance

This section of the Toolkit includes recommendations to support eligibility workers and case managers in effectively using the point of contact guidance across programs, to support individuals with intellectual and developmental disabilities, with initiating and maintaining long-term care services.

Email guidance and tips

Use the point of contact email as the first step in reaching out across programs for needed case assistance related to medical or I/DD services eligibility.

- When sending emails between agencies:
  - Use your agency's secure messaging service or #secure# in the subject line for state employees.
    - If you encounter issues using your agency's secure messaging service, you can send an email to the other agency, requesting them to initiate the secure email thread.
  - Use the email template to help ensure timely responses.
  - If there is an urgent access to care issue or an individual is at risk of losing placement, include the word 'Urgent' in the subject line.

- Become familiar with existing communication policies between programs.
  - OEP-IM-25-014 and DD-IM-26-007
- Use the ODDS.OEP Cross-Program Terminology Guide to support the language used in your email communications.

If the situation cannot be resolved through email, or is time sensitive, use the available directories to make a phone call to the appropriate agency or office.

Cross program communication

To ensure timely and accurate benefit determinations, this section offers tips and recommendations to efficiently request case support through the point of contact email.

Eligibility worker to I/DD Services case manager

An eligibility worker may need to initiate contact with an I/DD services case manager for support in situations such as:

- The case is pending for I/DD service eligibility.
- Notification that PMDDT has been initiated because a disability determination is needed to approve or maintain medical coverage.
- Financial eligibility is going to lapse and there's been difficulty reaching or communicating with the individual or their authorized representative.
- At the individual's request to ensure service coordination.

How to contact an I/DD services case manager

- Send an email to the case manager through the point of contact email for their Brokerage or CDDP. The point of contact email can be found:
  - In the ZIP Matrix
  - If you are unsuccessful in finding the office providing services, email odds.onequestions@odhs.oregon.gov to request assistance and mark your email with a "High Importance" indicator.

Tips and information for eligibility workers

When reaching out to an I/DD Services case manager, consider the following:

- Once an individual is found eligible for I/DD services, their case manager assists them to navigate community resources and Medicaid funded services they might be eligible for, to help address their needs and goals.
- They will have an I/DD services case manager regardless of Medicaid eligibility or whether they receive funded I/DD long-term care services.
- Most I/DD services case managers work for organizations called Case Management Entities (CMEs). There are two types of CMEs in Oregon:
    - Community Developmental Disabilities Programs (CDDP) are often referred to as “the county”. Case managers at a CDDP are called Services Coordinators (SC).
    - Support Services Brokerages are often referred to as "Brokerage". Case managers at a Brokerage are called Personal Agents (PA).
- There are also I/DD services service coordinators who work for ODDS in a specific program called Children's Intensive In-Home Services (CIIS) and Children’s Residential Services. CIIS and children’s residential services employed Services Coordinators are State employees within ODDS who provide case management for the CIIS program (for children with complex care needs).
- Which entity provides an individual's I/DD services case management depends on the individual's age, living situation and, if applicable, their choice:

I/DD Services case manager to eligibility worker

An I/DD Services case manager may reach out to an eligibility worker for support in situations such as loss of medical benefits, general case questions, understanding what information the case is pending for or other next steps.

How to contact an eligibility worker

- Send an email to the eligibility worker through the point of contact email for the medical financial eligibility office in your area. See email templates.
- Email the OEP Eligibility Coordination Unit (ECU) with eligibility questions for all children seeking or receiving I/DD services. See email templates.
    - oep.eligibilitycoordinationunit@odhs.oregon.gov

Tips and information for I/DD Services case managers

- Initial applications for medical, renewals, and program closures are processed by eligibility workers.
- These eligibility workers are located throughout the state, either:
  - At a local ODHS office, sometimes referred to as Store Front Offices (SFO), which might be operated by employees of Oregon Eligibility Partnership (OEP), Area Agency on Aging (AAA), or Aging and People with Disabilities (APD).
  - At the ONE Customer Service Center also known as the Statewide Virtual Eligibility Center (VEC).
- All eligibility workers can access the ONE system and process applications for medical with long-term care. In alignment with a "no wrong door" approach, an eligibility worker from anywhere in the State can assist with any next steps for financial eligibility.
- When communicating with an eligibility worker:
  - Let them know you are the individual's I/DD case manager
  - Let them know the individual needs medical eligibility for their long-term care services through I/DD.
  - Refer to the transmittal OEP-IM-25-014 if they tell you that they're not authorized to share case information with you.

Seeking support from local leadership

Reach out to your local office leadership for support in the following situations:

- The program you are trying to coordinate with is unsure that they are allowed to share information. Refer to OEP-IM-25-014 or DD-IM-26-007
- Unable to resolve inquiry due to program communication barriers.
- Crisis situations with a tight timeline; immediate escalation is appropriate to avoid service disruption or harm.
- Lack of timely response.

Leadership resolution guidance

When staff are unable to resolve a situation after following the provided guidance, local leadership can provide support by reaching out across programs.

- Use the ZIP Matrix to find the contact information for the local area Program Manager for OEP/AAA.
- Use the County Directory for CDDPs or Brokerage Directory to identify local area CME Leadership.
- Be prepared to provide the following information in the phone call, a voice message or a follow-up email:
  - The individual's name.
  - Their Prime number.
  - Their social security number, if no prime number exists.
  - The issue at hand.
  - What contact attempts have been made to resolve the issue.
  - The suggested resolution or next steps.

See Point of Contact Implementation Tool

Continuous improvement and maintenance

Review the helpful tools, templates and resources section which has helpful tools to support the Point of Contact email inbox and local practices.

FAQs

- What if my office already has a shared email inbox used for this purpose?
  - Great! Please look through the Toolkit to ensure you've included all core elements for identifying and maintaining your inbox.
- Is it required to create and maintain a point of contact email box?
  - Yes! This Toolkit includes best practices for creating and maintaining a point of contact email. Tailor these ideas to suit the needs of your service area.

Helpful tools, templates, and resources

Inbox quality review tips

Purpose: To ensure consistent inbox standards and surface quality gaps early

- Timely response – Ensure email responses are timely.
- Professional communication - Correct email template/messaging being used
- Confirm Contacts in directory are accurate
- Inbox Access and Ownership – Roles defined, access periodically reviewed, onboarding and offboarding process for access.
- Inbox Structure and Organization – Establish folders or label systems, rules or filters as needed.
- Compliance and privacy – Ensure secure or sensitive data handled securely, no unnecessary personal data shared.

See Ongoing guidance

Local staff feedback survey

Purpose: Optional tool to gather staff feedback on the use and functionality of the Point of Contact Inbox.

1. How often do you use the shared inbox?

   ☐ Multiple times per day

   ☐ Daily

   ☐ A few times per week

   ☐ Rarely

2. What best describes your role when using the shared inbox? *(Select all that apply)*

   ☐ Monitoring incoming messages

   ☐ Responding to messages

   ☐ Assigning or triaging messages

   ☐ Escalating issues

   ☐ Other (please specify)

3. How easy is it to… *(1 Very difficult – 4 Very easy)*
    - Find messages you need?
    - Know who is working on a message?
    - Prioritize urgent messages
    - Track message status (new / in progress / resolved)
    - Respond efficiently without duplication

4. Emails are handled consistently across the team

☐ Strongly disagree

☐ Disagree

☐ Agree

☐ Strongly agree

5. Using the shared inbox helps us respond to customers/users in a timely way.

☐ Strongly disagree

☐ Disagree

☐ Agree

☐ Strongly agree

6. Roles and responsibilities for managing the shared inbox are clear.

☐ Strongly disagree

☐ Disagree

☐ Agree

☐ Strongly agree

7. If you could change ONE thing about the shared inbox, what would it be?

See Ongoing guidance

Lessons learned log

Purpose: This log helps teams learn from experience. It creates a simple, shared record of issues, fixes, and improvements so the same problems don't repeat. Over time, this log should become a practical reference for what works and what to avoid.

> **Please note:** this tool supports continuous improvement. It is not about tracking mistakes, but rather, capturing learning and making the system stronger.

When to use this log: Use this log when:

- An issue disrupts the point of contact process,
- A workaround is required,
- A change leads to noticeable improvement
- A pattern starts to emerge

When to review this log: during collaboration meetings

How to create and maintain the lessons learned log:

It is recommended that the lessons learned log be created and maintained in Excel or Smartsheet so entries can be easily updated, sorted, and reviewed over time. It is suggested that you create one entry per lesson learned, with each lesson entered as a new row.

Suggested columns to include in the lessons learned log:

Date identified
The date the issue or improvement opportunity was first identified.

Issue
A brief, factual description of what occurred.

Issue trigger
What was happening at the time the issue was first observed? Include relevant context.

Root cause
The underlying reason(s) the issue occurred. Consider process gaps, communication breakdowns, unclear roles, timing issues, system constraints, or resource limitations.

Action

The action taken to address the issue or improvement opportunity.

Outcome

The result of the action taken. What changed? What improved? What did not change?

Recommendation

What may be repeated, adjusted, or changed going forward to prevent recurrence or strengthen the process?

See Ongoing guidance

Email template

Purpose: Utilize this template when communicating across programs/agencies.

Subject Line: I/DD Services-Medicaid Coordination

Body:

- Individual's name:
- Prime number or SSN (if no prime #):
- Summarize the requested action or question:

See Email guidelines and tips guidance

Resources

Resource	Description
CDDP County Directory	Statewide directory of CDDPs
Brokerage Directory	Statewide directory of Brokerages
Zip matrix	Statewide directory for AAA, APD, & SSP

Resource	Description
	Includes OEP-AAA-CDDP-Brokerage Crosswalk
OEP-IM-25-014	ODHS and Type B AAA staff can share information with Office of Developmental Disabilities Services (ODDS) partner agencies like Community Developmental Disabilities Programs (CDDPs), Support Service Brokerages, and Children’s Intensive In-Home Services (CIIS) to coordinate benefits and services for people experiencing intellectual and/or developmental disabilities (I/DD).
DD-IM-26-007	Office of Developmental Disabilities Services (ODDS) partner agencies like Community Developmental Disabilities Programs (CDDPs), Support Service Brokerages, and Children’s Intensive In-Home Services (CIIS) can share information with ODHS and Type B AAA staff to coordinate benefits and services for people experiencing intellectual and/or developmental disabilities (I/DD).