

Instructions for Completing MED Case Consultations and Referrals

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Table of Contents

Initiating a MED Referral/Consult for LTSS/OPI-M/SPPC	1
MED Case Consult Criteria	2
Supporting Documentation for MED Consults.....	2
MED Review Referrals.....	2

Initiating a MED referral/consult for LTSS/OPI-M/SPPC

1. Gather **applicant medical and behavioral health records**, or **3010s/Releases of Information** from providers to Maximus.
2. **Visit the Case Management Tools page** “Make a request” section at:
<https://www.oregon.gov/odhs/providers-partners/seniors-disabilities/Pages/case-management.aspx>
 - Locate the “MED referrals and consults” tab link to the form.
 - The form direct link is also available to save to browser favorites:
<https://forms.office.com/g/CWK8G50d5i>
3. **Complete the form**

- Fill out the **online form** with all the required information and submit it.

4. Attachments and auto-response

- After submission, an auto-generated email will instruct the Case Manager to reply with the necessary attachments:
 - **002N, medical records, 3010s** (if applicable).

MED case consult criteria

Consults are appropriate for the following cases:

- Hospitalization: The individual is hospitalized, and medical records are available.
- APS Involvement: The individual has Adult Protective Services (APS) involvement.
- APD Services: The individual is on APD services, with supporting documentation.
- Service Application: The individual is applying for services and has provided relevant documentation.

Supporting documentation for MED consults

- Hospital records, “my chart” info, medication lists, discharge summaries, and treatment notes with diagnoses.

MED review referrals

If a consult is not approved and needs a full review, required documents include:

1. Signed Releases of Information (3010s): Required for sharing medical/mental health information.
 - Include guardianship paperwork if applicable.
 - Fax ROIs to providers asap.
2. CA/PS Assessment Summary Form (002n): **Must be completed within three (3) months.**
3. Medical/Mental Health Records: Include all available records.
 - Large files should be sent separately or uploaded to Laserfiche. If using Laserfiche, note it in the email.

Email: med.spd@odhsoha.oregon.gov

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OREGON DEPARTMENT OF
Human Services

Aging and People with Disabilities

Medicaid Services and Supports

500 Summer St. NE, E-10

Salem, OR 97301-1076

503-945-5600 odhs.info@odhs.oregon.gov www.oregon.gov/odhs