

## Aging and People with Disabilities

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**Number:** APD-IM-13-065

**Issue date:** 9/25/2013

**Topic:** Medical Benefits

**Subject:** Medical Case Processing Changes

**Applies to (check all that apply):**

- |                                                                        |                                                         |
|------------------------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> All DHS employees                             | <input type="checkbox"/> County DD Program Managers     |
| <input checked="" type="checkbox"/> Area Agencies on Aging             | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Health Services                |
| <input type="checkbox"/> Children, Adults and Families                 | <input type="checkbox"/> Other (please specify):        |

**Message:**

This transmittal is to be used as a supplement to [SS-IM-13-026](#).

***Medical Case Processing Changes***

As part of the Affordable Care Act implementation, OHA and DHS are changing the manner in which medical cases will be carried. Medical cases will be carried as follows:

- APD/AAA will carry:
  - All OSIPM cases
  - All stand alone Medicare Savings Programs (MSP) cases. The MSP programs are QMB, SMB, SMF. Cases on which OCCS medical programs and MSP programs are combined will need to be split. See SS-IM-13-026 for details.
- The OHA Statewide Processing Center (5503) will carry:
  - All Office of Client and Community Services (OCCS) medical cases, including those for clients age 60 through 64. The OCCS medical programs are: MAA, MAF, OPU, OPP, OPC, OP6, CHIP, BCCTP, CEC, CEM, HKC, EXT, SAC and the new MAGI-based programs.
  - Cases on which an individual is receiving both an OCCS medical program and a Medicare Savings Plan program (for example, a pregnant woman who also qualifies for QMB.)
- Self Sufficiency Programs will retain REFM only. This is the only medical program for which DHS SSP will be responsible.

## ***Background***

Beginning in January 2014, new medical programs will be available to applicants under the Affordable Care Act. These programs are similar to the current OHP (OPU, OPP, OPC, OP6...) programs, but use different eligibility group formation and income methodologies.

The new medical programs are often referred to as "MAGI Medicaid" because they use the federal tax Modified Adjusted Gross Income calculation. Under the MAGI Medicaid programs, eligibility groups are formed by looking at tax filing groups – e.g. who is filing taxes together. Income is evaluated using the same calculations that the federal income tax regulations apply when determining Modified Adjusted Gross Income.

States are required to begin accepting applications for the new programs on October 1, 2013. From October 1, 2013 through December 31, 2013 applications will be evaluated for eligibility under current programs and the new 2014 programs. OHA has been awarded a federal waiver to begin using the new MAGI income and filing group methodology for OCCS medical programs beginning in October 2013. The waiver allows OHA to use the new methodology in determining eligibility for both existing OHP programs and the 2014 new programs.

Because the new income and filing group methodology is significantly different from what is used today for the OHP programs, all OHP eligibility determinations and redeterminations from October 1, 2013 forward will be made in the OHP Central Processing Center (5503). This means that 5503 will carry the medical cases for all MAGI based eligibility programs.

## ***Actions Needed in APD/AAA Offices***

Effective October 1, 2013, APD/AAA offices will no longer be responsible for determining eligibility for the OHP programs or the new MAGI based medical programs being implemented with the Affordable Care Act in January 2014.

Central Office will automatically transfer all OHP cases currently housed in APD/AAA branches to branch 5503. If the Oregon ACCESS case was only used to reflect the OHP eligibility, it should be inactivated.

APD/AAA branches are responsible for completing OHP determinations or redeterminations for Dates of Request prior to October 1, 2013. Pending OHP applications with a date of request prior to October 1, 2013, should be processed in the APD/AAA office using September 2013 rules and then transferred to 5503 once the updating has been complete.

APD will continue to hold SNAP cases per the current agreements. This generally means that APD will hold SNAP cases for clients aged 60-64 and for childless younger

disabled households.

If there is no companion SNAP case, archive the hard file for the transferred medical case.

### ***OSIPM and stand alone MSP cases in SSP branches and 5503***

We have been advised that an automated process is being developed to transfer OSIPM and stand alone MSP cases from SSP offices and 5503 to APD/AAA offices. Additional information on this process will be forthcoming.

### ***Ongoing Medical Case Processing Expectations***

APD/AAA offices will generally continue to process the types of applications that are currently processed in our offices. As a general rule:

- APD will retain and process the application if:
  - The applicant is Aged, Blind or Disabled
  - The applicant is receiving Medicare and is neither pregnant nor a parent caretaker
  - The applicant is age 65 or older

APD/AAA offices will continue to process the applications meeting the criteria listed above using normal processes.

- 5503 will process the application if:
  - The applicant is NOT Aged, Blind or Disabled
  - The applicant is pregnant or a parent caretaker and receiving Medicare
  - The applicant is under age 65

APD/AAA offices will refer applications meeting the criteria listed above to 5503 for processing. If the APD office has established a date of request for medical in the APD/AAA office, the APD/AAA office should complete the “Medical DOR Form for OHA 5503” form (attached) and fax or email to branch 5503 to retain the client Date of Request.

Staff may encounter a variety of specific scenarios regarding how/where applications should be processed. To assist staff in determining how to proceed, Central Office is developing a **Medical Processing Transition Chart** which will be housed on the [\*\*\*Affordable Care Act \(ACA\) Information and Help\*\*\*](#) page in Staff Tools. This chart is designed to outline the process for specific scenarios and timeframes. The chart will be updated as additional scenarios present themselves.

### ***OSIPM Presumptive Process***

The OSIPM presumptive process is unchanged from October 1, 2013 through December 31, 2013. While we do anticipate that the availability of the new MAGI

Medicaid programs may affect the number of OSIPM presumptive determinations required, the process remains the same at this time. Additional information will be provided later in the year regarding changes to the process.

***What if a client is denied or no longer eligible for OSIPM and/or a stand alone Medicare Savings program?***

Under new Oregon legislation, DHS and OHA are required to proceed with a determination for MAGI medical program eligibility and/or Advanced Premium Tax Credit (APTC) eligibility when a client is denied APD/AAA administered medical or the APD/AAA administered medical program eligibility is closed.

**OSIPM/MSP Denials:**

- Send the denied household the following:
  - “Oregon Health Plan – Health Care Coverage for Oregonians” brochure
  - SPD 540 form with the following language:
    - You are not eligible for the APD/AAA medical programs for the following reasons: {insert the applicable rules and reasons for denial}. You may be eligible for other medical programs and you will receive a separate contact regarding potential eligibility.
- Email or Fax 5503 the “Medical DOR Form for OHA 5503”. In the Additional Information/Instructions section, indicate that the household was found ineligible for OSIPM/MSP and needs to be evaluated for MAGI and tax credit eligibility.
- If there is a CM case, process the program denial.
- Inactivate the Oregon ACCESS case, as appropriate.

**OSIPM/MSP Closures:**

- Send the ineligible household the following:
  - Oregon Health Plan – Health Care Coverage for Oregonians” brochure
  - Notification that they will be contacted in regards to eligibility for other medical programs
- Email or Fax 5503 the “Medical DOR Form for OHA 5503.” In the Additional Information/Instructions section, indicate that the household is no longer eligible for OSIPM/MSP and needs to be evaluated for MAGI and tax credit eligibility.
- Keep the OSIPM/MSP Oregon ACCESS and CM case open. Central Office is developing a process by which these cases can be “flagged” as pending an OHP/MAGI determination.
- Set a follow up tickler 30 days in the future. If staff have not heard back from 5503 with a determination by 30 days, contact 5503 for status information
- If 5503 approves the OHP/MAGI medical:
  - Send a 540 notice of reduction
  - Close the Oregon ACCESS and CM case reflecting the OSIPM/MSP eligibility
  - 5503 will establish eligibility for OHP

- If 5503 denies the OHP/MAGI medical
  - Send a 540 notice of closure
  - Close the Oregon ACCESS and CM case

**Contact Information**

For questions about APD procedures, please send an email to:  
[SPD.WEB@dhsoha.state.or.us](mailto:SPD.WEB@dhsoha.state.or.us).

To fax forms and information to 5503, please use number: 503-373-7493

To email forms and information to 5503, please send an email to:  
[5503SSPCASETTRANSFERS@dhs.oregon.gov](mailto:5503SSPCASETTRANSFERS@dhs.oregon.gov)

**Attachments**

Please see [SS-IM-13-026](#) for the following attachments:

- “Medical DOR Form for OHA 5503” form
- “Oregon Health Plan – Health care coverage for Oregonians” brochure

For questions about APD procedures, please send an email to:  
[SPD.WEB@dhsoha.state.or.us](mailto:SPD.WEB@dhsoha.state.or.us)

*If you have any questions about this information, contact:*

<b>Contact(s):</b>	For questions about APD procedures, please send an email to: SPD.WEB@dhsoha.state.or.us Katherine Bodi - 503-945-6455 Lauren Mitchell - 503-945-6479		
<b>Phone:</b>		<b>Fax:</b>	
<b>Email:</b>	<a href="mailto:SPD.WEB@dhsoha.state.or.us">SPD.WEB@dhsoha.state.or.us</a>		

## DATE OF REQUEST FOR OCCS MEDICAL PROGRAM BENEFITS

**Instructions:** Use to document an applicant's date of request for medical program benefits for the OHA Statewide Processing Center (branch 5503). Fax completed form to 5503 at 503-373-7493.

**DATE OF REQUEST:** \_\_\_\_\_

(Date medical requested)

**DOR TYPE:**  CAPI  Other (Verbal/Note)  CMP (5503 Use Only)

**APPLICANT NAME:** \_\_\_\_\_

**APPLICANT GENDER:**  Female  Male

**REQUESTER'S NAME:** \_\_\_\_\_

(If different from applicant)

**APPLICANT SSN:** \_\_\_\_\_ **or PRIME #:** \_\_\_\_\_ **APPLICANT DOB:** \_\_\_\_\_

**APPLICANT ADDRESS:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**PHONE NUMBER:** \_\_\_\_\_

**LANGUAGE:**  EN  SP  RU  VI  OTHER

**ALTERNATE FORMAT:**  Braille  Large Print  Oral Presentation  Audio

**PRIORITY:**  Regular  Unborn  Emergency  Safety Concerns

**PERSON COMPLETING FORM:** \_\_\_\_\_ **BRANCH:** \_\_\_\_\_

**ADDITIONAL INFORMATION / INSTRUCTIONS:** \_\_\_\_\_

## What health benefits will I receive?

Most people will qualify for the Oregon Health Plan's full benefit package called OHP Plus.

Below is a list of some OHP Plus benefits:

- ▶ Doctor visits
- ▶ Mental health care
- ▶ Addictions treatment
- ▶ Basic dental services: cleaning, fillings and extractions
- ▶ Hearing aids and hearing aid exams
- ▶ Medical equipment and supplies
- ▶ Medical transportation
- ▶ Physical therapy
- ▶ Occupational therapy
- ▶ Speech therapy
- ▶ Home health services such as physical therapy
- ▶ Acupuncture
- ▶ Some vision services for eye health

## Coordinated Care

Oregon Health Plan members are served by a local coordinated care organization. Coordinated care organizations (CCOs) include local health care providers of all types. CCOs also include hospitals and other physical and behavioral health services. All CCOs have high standards for quality and care coordination. Multiple times a year, information is posted online about how CCOs are doing to improve health care for Oregonians.

**Visit** [www.ohp.oregon.gov](http://www.ohp.oregon.gov) to find out more.



This document can be provided upon request in alternative formats for individuals with disabilities. Other formats may include (but are not limited to) large print, Braille, audio recordings, Web-based communications and other electronic formats. Call 1-800-699-9075 to arrange for the alternative format that will work best for you.

# Oregon Health Plan

Health care coverage for Oregonians



[www.ohp.oregon.gov](http://www.ohp.oregon.gov)





# New choices for health coverage

## What is the **Oregon Health Plan?**

The Oregon Health Plan (OHP) is health care coverage for Oregon residents: children, adults and families. The Oregon Health Plan covers doctor visits, preventive care, mental health, addiction treatment and prevention, basic dental care and more.

## Who qualifies for the Oregon Health Plan?

Oregon Health Plan coverage is based on household income and state residency. You may qualify for OHP even if you have been denied coverage in the past.



## What are the **income limits?**

To qualify for OHP, the income limits are different for adults and children.

### Adults

For example, any Oregon adult (age 19 and older) who earns up to \$15,800 a year for a single person or \$32,500 a year for a family of four may qualify for OHP.

### Children

For example, any Oregon child (0-18 years-old) whose family earns up to about \$46,500 a year for a family of two (parent and child) or \$70,600 for a family of four (adult(s) and children) may qualify for OHP.

**Note:** These income levels are approximate. Qualification is based on Federal Poverty Levels. For children, it is 300 percent of the Federal Poverty Level. Effective January 1, 2014, the income limit for adults is 138 percent of Federal Poverty Level.

## How do I apply for OHP or other kinds of health coverage?



**Apply online.** Go to Cover Oregon, our state's online marketplace. There you can find out if you qualify for OHP or other types of coverage. If you earn too much for OHP, there may be financial assistance available for other health plans.

**Online application:** [www.coveroregon.com](http://www.coveroregon.com). For questions, call 1-855-CoverOR.

**Paper application.** Call 1-855-CoverOR or 711 (TTY) to request an application be mailed to you. Applications are available in several languages. You can also find an application at any Oregon Department of Human Services office. For locations, go to: [www.ohp.oregon.gov](http://www.ohp.oregon.gov)

### Do you receive SNAP? Enrolling is simple.

If you are a current recipient of the Supplemental Nutrition Assistance Program (SNAP), you may qualify for fast-track enrollment. Call 1-800-699-9075 to enroll or for more information.