

Aging and People with Disabilities

Angela Munkers
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Number: APD-IM-15-064

Issue date: 9/4/2015

CORRECTED

Topic: Long Term Care

Subject: Oregon Access changes due to the August 31st policy changes

Applies to (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> Health Services |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services(ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> ODDS Children's Residential Services | <input type="checkbox"/> Other (<i>please specify</i>): |
| <input type="checkbox"/> Child Welfare Programs | |

Message: Oregon Access CA/PS will be undergoing multiple changes to accommodate rule revisions which are effective August 31st, 2015. The revisions will be visible on that date. The rule changes are referenced in [APD PT 15-023](#) and [APD PT 15-025](#).

There is currently a conference call scheduled for Wednesday, September 2nd, 2015 at 1:00 p.m. to answer questions regarding the rule changes. However, we are repurposing this time in part to go over the Oregon ACCESS changes. This will be in a webinar format. Case managers and others that utilize Oregon ACCESS CA/PS are strongly encouraged to attend this webinar to view the changes, as well as to receive clarifications or updated information that is related to the rule changes.

The training will be recorded and posted in the Training & Events Section in APD Case Management Tools.

Please pre-register for the webinar scheduled for September 2, 2015 1:00 PM PDT by clicking on the following link:

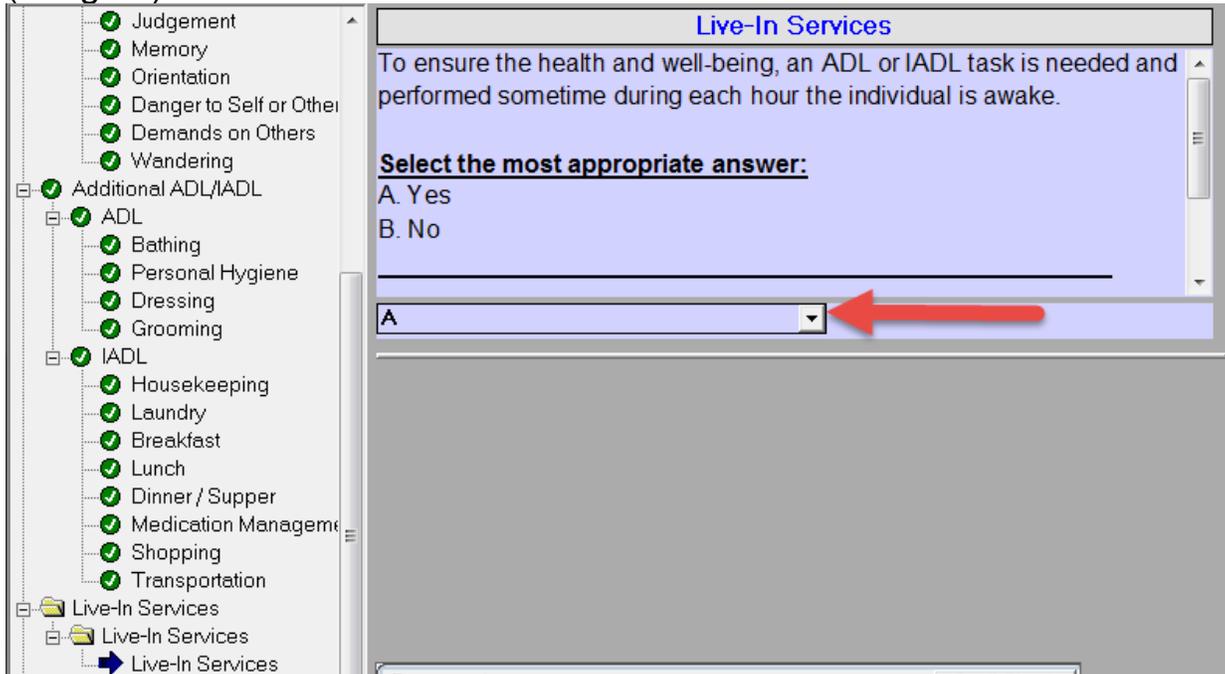
<https://attendee.gotowebinar.com/register/660969584788367618>

The following information will be reviewed at the upcoming webinar:

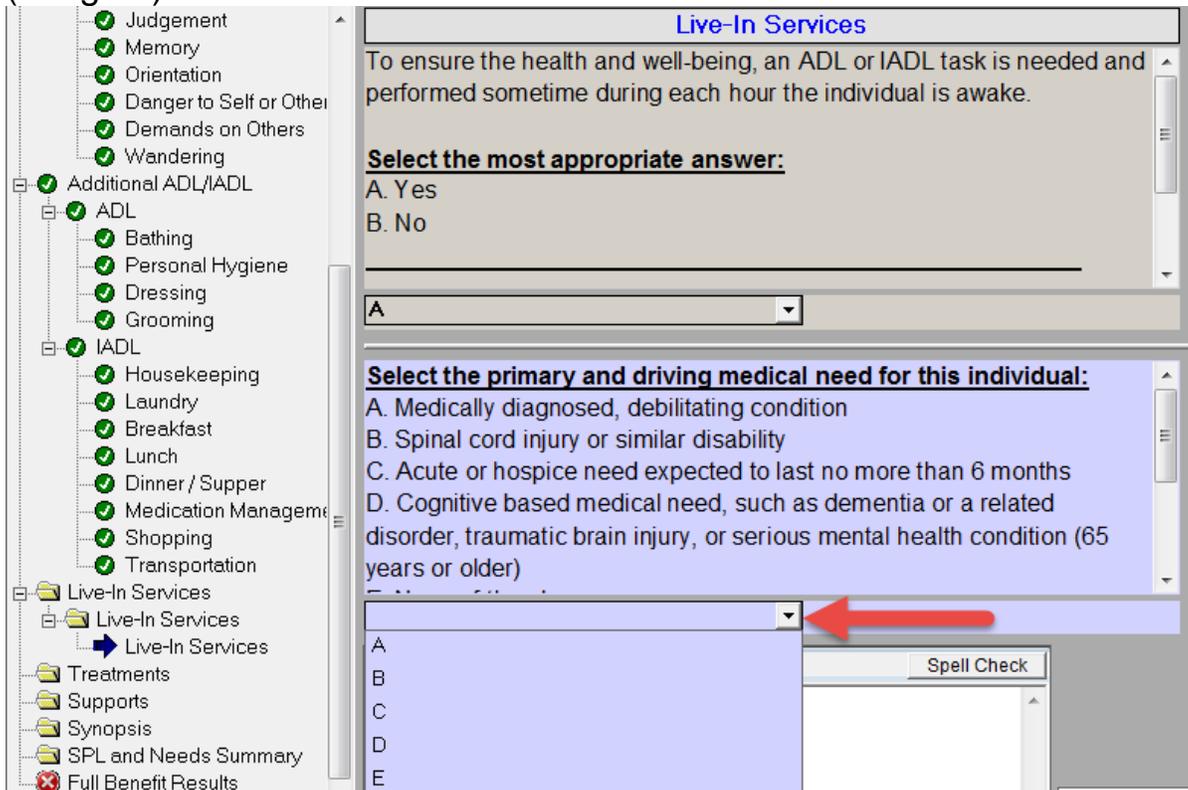
Assessment Changes:

- The assessment create date is what triggers the new live-in rules in Oregon ACCESS. For example, if an assessment was completed on August 25th, 2015, but it was not created in Oregon ACCESS until August 31st, 2015, then the new the rules will be in place for that assessment.
- The “Spousal Pay” button on the Full Benefit Results screen has been relabeled to read “SPL Summary” to support the multiple reasons why this information is used.
- The “Sleep” folder, questions and help text are renamed to “Live-In Services”. This will also affect assessments created prior to August 31st, 2015; however the previous “Sleep” question will still display.
- “Live-In Services” folder:
 - This folder contains up to two new questions that must be answered prior to completing the assessment. This replaces the question that was previously asked in the “Sleep” folder.
 - The Assist level for this need group operates differently from other ADL/IADL needs.
 - If the person is eligible for Live-In Services/Shift Care Services, and/or Live-In Service hours under the Independent Choices Program, the Full Benefit Results screen will indicate a “Full Assist” level for Live-In Services. The individual is not eligible for any Live-In Service hours or Shift Care Services if the “Indep” need level is displayed.
 - Live-In Services will appear in Hours segments for assessments created on or after 8/31/15, even if the assist level is “Indep”. This will allow Central Office to authorize Live-In Services hours for exception requests.
 - Live-In Services could show “Full Assist” on the SPL Result and Needs Summary window and “Indep” on the Full Benefit Results screen. This will occur if the questions answered under the Live-In Services folder indicate the individual has care needs every waking hour and has a corresponding medical need, yet does not have a Full Assist in the appropriate ADL as defined in [APD PT 15-025](#). In this instance, the individual is actually not eligible for services under the new rule criteria. See example below:

(Image 1)



(Image 2)



Selecting YES for 'tasks need to be performed each hour the individual is awake' (Image 1) will then require selection of a 'primary and medical driving need' (Image 2).

(Image 3)

The screenshot shows the 'SPL Result and Needs Summary' interface. On the left is a tree view with categories like 'Additional ADL/IADL', 'Live-In Services', and 'Treatments'. The main area contains a table with columns: Need, Level, Status, and Provider. The 'Service Priority Level' is set to 05. A red arrow points to the 'Full assist' entry in the 'Live-In Services' row.

Need	Level	Status	Provider
Transfers	Assist		
Eating	Assist		
Bladder	Assist		
Bowel	Assist		
Toileting	Assist		
Adaptation	Assist		
Awareness	Assist		
Judgement	Assist		
Memory	Assist		
Orientation	Assist		
Danger to Self or Others	Assist		
Demands on others	Assist		
Wandering	Assist		
Bathing	Assist		
Personal Hygiene	Assist		
Dressing	Assist		
Grooming	Assist		
Housekeeping	Assist		
Laundry	Assist		
Breakfast	Assist		
Lunch	Assist		
Dinner / Supper	Assist		
Medication Management	Assist		
Shopping	Assist		
Transportation	Assist		
Live-In Services	Full assist		

It is important to note that if the ADL and IADL task statement is answered 'yes' this will automatically generate a 'Full Assist' for Live-in Services (Image 3).

(Image 4)

The screenshot shows the 'Full Benefit Results' interface. It includes a tree view on the left and a main area with sections for 'Results', 'In-Home Maximum Hours', and 'Live-In Services'. A red arrow points to the 'Live-In Services' row in the table, which shows 'Indep' and 0 hours.

Need	Assist	Hours
ADL		
Dressing/Grooming	Minimal	5
Eating	Minimal	5
Bath/Personal Hygiene	Substantial	15
Cognition	Substantial	10
Elimination	Substantial	20
Mobility	Substantial	15
IADL		
Breakfast	Minimal	4
Dinner / Supper	Minimal	8
Lunch	Minimal	4
Medication Management	Minimal	2
Shopping	Minimal	2
Transportation	Minimal	2
Housekeeping	Substantial	10
Live-In Services		
Live-In Services	Indep	0

However, if the user chooses a primary and medical driving need, but the CAPS assessment responses do not produce the appropriate Full Assist need per [APD PT 15-025](#), the Full Benefits Result will indicate that Live-in Services are 'Indep' and 0 hours will be generated for this service (Image 4).

- The number of hours for Live-In Services is now calculated differently.
 - Assessments created on or after 8/31/15 will calculate a variable amount of hours. The system calculates as follows: 496 – (total of ADL and IADL hours) = Live-In Service hours. This is to accommodate future changes in the authorization for Live-In Service hours. However, until the change occurs, case managers must change the calculated hours to 159 or zero based on the individual’s eligibility. See [APD PT 15-025](#) for specific eligibility criteria.
 - The system will no longer calculate the 60, 110 or 159 hours as was done in the past.

Benefits and Service Planning

- If Live-In Service hours are allowed in the Hours segment, a paid live-in HCW must be a part of the service plan in order for it to be approved.
- Service plans involving a spouse as a paid hourly provider can’t have a start date prior to 8/31/15.
- If the SPL and Needs Summary displays a “Full Assist” for Live-in Services, but displays as “Indep” in the Full Benefit Results screen (see the above examples under the “Live-in Services Folder”), Live-in Services will not show up as an option under Needs Association or display on the Task List (598N), even if exceptions hours are approved for it. However, the Live-in Services category will still display the number of assigned hours on the task list.
- Central Office exception approvals are only valid within the same Hours segment. When a new Hours segment is created (due to a new assessment or a change in the current Hours segment), a new authorization from Central Office will be required. This does not apply to exceptions granted due to having more than 145 ADL hours or 85 IADL hours.
- On assessments created on or after 8/31/15, when the new Live-In Services need indicates a Full Assist level (with hours) if the 'Prev' button is clicked the Assist level will still be Full but the hours will be zero. The reason for this is because there are two benefit versions using the same eligibility version.
- Only assessments created on or after 8/31/15 will a Live-In Services line on the Full Benefit Results screen appear. Prior to 8/31/15, the line will only appear if the individual is eligible for the service.
- New hour based Benefits (Hourly and Live-In) cannot span versions - meaning a new Benefit created on or after 8/31/15 can't have a begin date prior to 8/31/15.

ADL Roll-Up

- All ADL hours (Minimal, Substantial and Full) will be totaled and will appear in the ADL Full field on the Hours Authorization segment screen.
- The ADL Min and ADL Sub fields will be closed for hours assignment on the Assignment of in-Home Hours screen.
- When first entering the information on the Hours Authorization segment screen the ADLs won't total on the screen. When you leave the screen and go back in the numbers will then be totaled. This will hopefully be corrected in a future release.

(Image 1)

Hours Authorization Segment

In Home Hours Status: Pending Begin Date: 00/00/0000 End Date: 07/31/2016

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Bath/Personal Hygiene	Full	25	25	0	0	
	Bowel/Bladder	Substantial	20	20	0	0	
	Cognition	Substantial	10	10	0	0	
	Eating	Substantial	20	20	0	0	
	Mobility	Minimal	10	10	0	0	
I/ADL	Breakfast	Minimal	4	4	0	0	
	Dinner / Supper	Full	24	24	0	0	
	Housekeeping	Minimal	5	5	0	0	
	Lunch	Substantial	8	8	0	0	
	Medication Management	Minimal	2	2	0	0	
	Transport	Substantial	3	3	0	0	

	ADL Min	ADL Sub	ADL Full	IADL	Live-In Services
Total Allowed Hours	10	50	25	46	0
Total Exception Hours	0	0	0	0	50
Total Authorized Hours	10	50	25	46	50

Approved Date: 00/00/0000 Created Date: 08/27/2015 Last Modified Date: 08/27/2015
 Approved By: Created By: hsint06 Last Modified By: hsint06

OK Cancel

This will initially display when entering in the hours for the first time in the Hours Authorization segment screen (Image1)

(Image 2)

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
Live-In	Live-In Services	Indep	0		0	50	
ADL	Bath/Personal Hygiene	Full	25	25	0	0	
	Bowel/Bladder	Substantial	20	20	0	0	
	Cognition	Substantial	10	10	0	0	
	Eating	Substantial	20	20	0	0	
	Mobility	Minimal	10	10	0	0	
I/ADL	Breakfast	Minimal	4	4	0	0	
	Dinner / Supper	Full	24	24	0	0	
	Housekeeping	Minimal	5	5	0	0	
	Lunch	Substantial	8	8	0	0	
	Medication Management	Minimal	2	2	0	0	

	ADL Min	ADL Sub	ADL Full	IADL	Live-In Services
Total Allowed Hours	0	0	85	46	0
Total Exception Hours	0	0	0	0	50
Total Authorized Hours	0	0	85	46	50

Approved Date: 00/00/0000 Created Date: 08/27/2015 Last Modified Date: 08/27/2015
Approved By: Created By: hsint06 Last Modified By: hsint06

This will display after exiting and re-entering the hours set in Hours Authorization segment screen (Image 2)

(Image 3)

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	15	0	0	
	Bowel/Bladder	Substantial	20	20	0	0	
	Cognition	Substantial	10	10	0	0	
	Dressing/Grooming	Full	20	20	0	0	
	Eating	Minimal	5	5	0	0	
	Mobility	Substantial	15	15	0	0	

	ADL Min	ADL Sub	ADL Full	IADL	Live-In Services
Total Allowed Hours	0	0	85	39	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	0	0	85	39	0
Total Hours Assigned	0	0	85	39	0
P Smith, Calla	0	0	85	39	0

Clear Assigned Hours Show Me What's Left OK Cancel

All ADL hours are entered into the "ADL Full" section when assigning hours to the HCW (Image 3).

Copy and Creating a Plan Prior to 8/31/15

- When copying a service plan that was created prior to 8/31/15, hours that are found in the “ADL Min” and “ADL Sub” sections will be in grayed out boxes (Image 1). Since these hours can’t be modified, they must be cleared and re-entered.

(Image 1)

Assignment of In-Home Hours Status: Pending Begin Date: 07/01/2015 End Date: 12/31/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
Live-In	Live-In Services	Minimal	60	0	60	0	CM Determination
ADL	Bath/Personal Hygiene	Minimal	10	10	0	0	
	Cognition	Substantial	10	10	0	0	
	Mobility	Substantial	15	15	0	0	
IADL	Dinner / Supper	Full	24	24	0	0	
	Medication Management	Minimal	2	2	0	0	
	Shopping	Substantial	4	4	0	0	

Hours Assignment (All hours must be assigned in 1 hour increments)

	ADL Min	ADL Sub	ADL Full	IADL	Live-In Services
Total Allowed Hours	0	0	35	33	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	0	0	35	33	0
Total Hours Assigned	10	25	0	33	0
P HISTORY MAKERS LLC	0	0		33	0
P HISTORY MAKERS LLC	10	25	0	0	0

Clear Assigned Hours Show Me What's Left OK Cancel

In order to assign the hours into the ADL Full box, the “Clear Assigned Hours” button must be pushed.

Tier Security Rights

Live-in Services (Additional information can be found in [APD PT 15-025](#).)

- This applies to any assessment that is created on or after 8/31/15.
 - Tier 3 (Central Office): Approve an initial and ongoing service plan that involves live-in services in the **hours segment**.*
 - Tier 3: Approve an ongoing service plan that involves live-in services in the **hours segment** if the total number of hours changes from the previous **hours segment**.*
 - Tier 3: Approve an initial and ongoing **plan segment** that involves authorization of hours that are lower than what was authorized in the **hours segment**.*

- Tier 2 and 1 (Managers/Lead Workers and Case Managers): Approve an ongoing **plan segment** that is equal in hours to the **hours segment**.*

*(please note that whenever a new assessment is created, a new authorization from Tier 3 is required)

Hourly Cap (Additional information can be found in APD PT 15-028).

- This applies to any assessment, regardless of when it was created. Any service plan segment with a start date of 8/31/15 or later will be impacted.
 - Tier 3: Approve all initial requests that are over 220 hours per month for one HCW providing hourly care in the **plan segment** of the service plan.*
 - Tier 2: Approve all ongoing requests if the HCW that is receiving the exception hours remains the same or is reduced (if still above 220) in the new **plan segment**.*

*(please note that whenever a new assessment **or hours segment** is created, a new authorization from Tier 3 is required)

Policy Questions

Email questions regarding these new polices to: DOL.Questions@dhsosha.state.or.us or contact the appropriate Policy Analyst.

Oregon ACCESS Functionality and Training Questions:

Email questions that relate to the functionality and training needs (non-policy issues) of an Oregon ACCESS release to: OregonAccess.release@state.or.us.

Oregon ACCESS Service Desk Tickets:

Email Oregon ACCESS system problems that need to be fixed to the service desk at: ServiceDesk.DHS or ServiceDesk@state.or.us, or phone 503-945-5623.

If you have any questions about this information, contact:

Contact(s):	Mat Rapoza – Operations and Policy Analyst		
Phone:	503-985-6985	Fax:	503-947-4245
Email:	mathew.g.rapoza@state.or.us		