

Cathy Cooper

Authorized Signature

Number: SPD-PT-06-018
Issue Date: 04/27/2006

Topic: Long Term Care

CORRECTED

Transmitting (check the box that best applies):

- New Policy
 Policy Change
 Policy Clarification
 Executive Letter
 Administrative Rule
 Manual Update
 Other: _____

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 type="checkbox"/> Children, Adults and Families | <input checked="" type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Other (please specify): |

Policy/Rule Title:	Instrumental Activities of Daily Living		
Policy/Rule Number(s):	OAR 411-015-0007	Release No:	
Effective Date:	5/1/06	Expiration:	
References:			
Web Address:	http://www.dhs.state.or.us/policy/spd/rules/411_015.pdf		

Discussion/Interpretation:

A new rule, OAR 411-015-0007 Instrumental Activities of Daily Living, will become effective May 1, 2006. The Department adopted this rule as it did not have written policy or definitions governing how to assess Instrumental Activities of Daily Living. In addition, the Office of Administrative Hearings had advised Seniors and People with Disabilities (SPD) that rules separate from definitions were necessary to take actions on cases and have those decisions be upheld in contested case hearings. Local office staff should be familiar with these definitions as they reflect current case management, training and practice and are similar to instructions provided in CA/PS assessment help screens.

A rule advisory group composed of SPD Central Office Program and field review staff, working with advocates and local SPD/AAA managers developed this new rule. The group made efforts to include answers to frequently asked technical assistance questions on Instrumental Activities of Daily Living in the rule.

Staff may read the rule on-line in its entirety on May 1, 2006 at:

http://www.dhs.state.or.us/policy/spd/rules/411_015.pdf

Highlights include:

-Clauses describing how to assess needs,

-Specifying that needs must have existed within the assessment time frame to be considered,

-Housekeeping is limited to the needs of the individual, not others in the residence and includes only the interior of the residence. It does not include home repair or pet care,

-How to assess an individual's laundry needs and that laundry is included in housekeeping service plan hours,

-Meal Preparation- each meal is assessed individually. The fact that an individual lives in a residence that offers meal preparation services does not affect the assessment of an individual's ability to prepare meals. (Note: Although it is not specified in the rule, all meals should only be selected if an individual can not prepare any meals for him/herself.)

The individual's ability to prepare the main meal of the day should be assessed and coded as dinner/supper, even if the individual chooses to have the main meal at noon or any other time. This is important as dinner/supper is allowed greater service plan hours.

Home-delivered meals is a resource that can meet a need for assistance in meal preparation. The fact that an individual may already be receiving home delivered meals does not automatically indicate if the person has or does not have meal preparation assistance needs. A person may receive the meals but still need the assistance of another person to place the food within reach, open the container, or prepare other daily meals. Needs must be assessed regardless of the services provided.

-Medication Management- oxygen management is included in the assessment of medication management. This was added as oxygen management is covered in SPD's Title XIX Home and Community Based Services waiver.

-Shopping must be for the benefit of the eligible individual, not others in the household and must be related to the service plan. For example, grocery shopping is related to assistance needs with meal preparation.

-Transportation- mileage reimbursement is not included in the assessment of transportation or in transportation hours. Transportation is the time spent transporting

an individual or providing assistance during a ride. A policy transmittal will be issued shortly that gives further detail on service plan related transportation. This transmittal should be used in conjunction with the new rule when considering the assessment and authorization of transportation.

Staff should use the rule posted on-line rather than the CA/PS Help screens at this time. It is intended that the next full release of Access have the correct rule language but the release date has not been confirmed.

Implementation/Transition Instructions:

None.

Training/Communication Plan: Rule changes will be incorporated into Basic Case Management and Regional Technical Training. Additional training will be considered upon request.

Local/Branch Action Required: Use the new rule in assessing Instrumental Activities of Daily Living. For individuals already receiving services, apply the new rule at the next re-assessment. Send a reduction notice if the new assessment indicates the individual is no longer eligible for a currently authorized service. Take all other reduction actions needed to implement the change. For example: Send Homecare Workers a 4105 notice for a reduction in authorized services or hours. Make pay-in adjustments as necessary.

Central Office Action Required: Provide technical assistance and support as needed.

Field/Stakeholder review: Yes No

If yes, reviewed by: Rule Advisory Group which included: representatives of the Governor’s Commission on Senior Services, Persons with Disabilities Advocacy Council, SPD and AAA local offices and others.

Filing Instructions: New rule OAR 411-015-0007 will be posted and available through the SPD Case Management Tools (choose Administrative Rules, 411-015 Service Priorities) web site http://www.dhs.state.or.us/policy/spd/rules/411_015.pdf and the Secretary of State’s Oregon Administrative Rules website.

If you have any questions about this policy, contact:

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