

WG-1 Agreement between OHA, APD, and AAA offices regarding medical applications

Effective 12/9/13

This Worker Guide describes the agreement between OHA processing branch 5503, APD, and AAA offices, and which office will carry certain cases.

Effective October 2013, the Department of Human Services (DHS) and the Oregon Health Authority (OHA) implemented Patient Protection and Affordable Care Act (ACA) medical. To learn more about the ACA, visit the website: <https://www.healthcare.gov/>.

Overview

Effective October 1, 2013, the OHA will be responsible for, or “carry”, and make determinations for most medical cases.

- Self Sufficiency (SS) will determine or carry **only** Refugee medical (REFM) cases;
 - Medical benefits for children and families were removed from the SS offices;
- Medical cases for persons who are aged, 60 or older, or who have a disability will continue to be held in Area Agency on Aging (AAA) or Aging and People with Disabilities (APD) local offices;
 - This includes persons who receive Medicare;
 - AAA and APD offices will also carry REFM cases when appropriate due to age or circumstance;
- AAA and APD offices no longer determine eligibility for or carry non-APD medical cases:
 - BCCTP, CEC, CEM, CHIP, EXT, HKC, MAA, MAF, OPC, OP6, OPU, and SAC.

The Office of Client and Community Services (OCCS), oversees the OHA processing center, branch 5503, in Salem; branch 5503 carries the ACA medical cases.

Cover Oregon: Cover Oregon is a website where both customers and the public, regardless of income can search and compare health insurance. DHS and OHA work with Cover Oregon to assist applicants. To learn more about Cover Oregon, visit the website: <https://www.coveroregon.com>.

APD medical: "APD medical" refers to medical benefits based on either Social Security Administration (SSA) eligibility or those based on the person having a disability.

APD medical benefits are:

- Oregon Supplemental Income Program medical- [OSIPM](#); and
- Qualified Medicare Beneficiary – [QMB](#).

Who carries the case.

1. Applicant or customer is under age 60 and NOT receiving SSI:
 - OHA branch 5503;
 - Complete the [Medical DOR Form for OHA 5503](#) form for the customer;
 - Email the form to 5503, 5503.sspcasetransfers@state.or.us, or fax the form or completed application to 503-373-7493 within one business day;
 - *Note: 5503 does not need the online application; only the DOR form is necessary.*
2. Applicant or customer is under age 60 and RECEIVES SSI:
 - AAA or APD office in the applicant's area;
3. Applicant is OVER age 65:
 - AAA or APD office in the applicant's area;
 - Applicant or customer does not have to actively receive SSI;
4. Applicant or customer is a refugee:
 - Forward to OHA branch 5503;
 - Email the form to 5503, 5503.sspcasetransfers@state.or.us, or fax the form or completed application to 503-373-7493 within one business day;

- REFM applications will be reviewed for OCCS medical eligibility. If not eligible for OCCS medical, 5503 will forward the applicant to a SS, AAA, or APD office based on age and circumstances;
5. Applicant or customer has open TANF and receives SSI;
 - SS will keep the TANF case in their office and forward the application to an AAA or APD office for an APD medical determination;
 - If determined eligible for APD medical benefit, the local office will keep the medical case and work with the SS office;
 6. Applicant or customer has applied for but is not yet received Medicare;
 - AAA or APD office in the applicant's area;
 - OHA will not keep Medicare or Medicare eligible persons;
 7. Applicant or customer has an open SNAP case at SS and is receiving SSI;
 - AAA or APD office in the applicant's area;
 - SS only carries REFM cases and 5503 cannot carry medical cases for persons who are eligible for APD medical;
 - If the medical applicant or customer does not have any other companion cases at SS, the SNAP case will be transferred also;
 8. Applicant or customer qualifies for OCCS medical and State Plan Personal Care (SPPC);
 - OHA branch 5503 will carry the medical case; AAA or APD will carry the services;
 9. Applicant or customer has SSDI but not Medicare;
 - OHA branch 5503 will carry the medical case until the person starts receiving Medicare;
 - If the customer needs services, OHA branch 5503 will carry the medical case the AAA or APD office will carry the service case.

Procedures

Closed or denied. Closed or denied cases in AAA or APD offices **must** be referred to OHA branch 5503 using the [*Medical DOR form*](#);

- Do not refer the case to branch 5503 if it has closed due to death or because the customer moved out of state;
- Use the date associated with the closure for the notice;
- Pend and refer service cases to OHA branch 5503 when the customer failed to make their pay-in, or failed to hire a homecare worker;
 - If the income will cause the case to become "NA", remove the income;
- A limited number of Medicare closures will be eligible for OCCS medical, so refer Medicare closures to OHA branch 5503 as well;

Transferring. When transferring a case to OHA branch 5503, transfer only the electronic or CMS case;

- OHA branch 5503 does not use paper files;
- Archive the hard file via the local branch office procedure;
- Use the transfer email box to send cases to OHA branch 5503: 5503.casetransfers@state.or.us;
- If a customer contacts the local branch about a case transferred to the OHA branch 5503, give them the 5503 phone number: 1-800-699-9075.

If you have a disability and need a document on this website to be provided to you in another format, please contact the Office of Document Management (ODM) at 503-378-3486 or by e-mail at dhs.forms@state.or.us.

If you have questions about DHS or problems getting DHS services, send e-mail to dhs.info@state.or.us. If you have comments about this site, send e-mail to spd.web@state.or.us.

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