

General Assistance Program Manual and Worker Guide

Effective Jan. 1, 2024

Program Intent

The intent of the General Assistance (GA) program is to provide OSIPM Presumptive Medicaid individuals or married couples with severe disabilities and no dependent children, who are experiencing homelessness, and who are waiting to be awarded Supplemental Security Income (SSI) benefits with the following:

- Interim housing assistance.
- Utility assistance.
- Cash assistance.
- Free professional assistance with the Social Security application and appeals process.

Program Overview

The GA program serves a capped caseload of 200 OSIPM Presumptive Medicaid individuals. The program provides individuals with housing assistance, utility assistance, and cash assistance. These payments are funded with General Fund dollars and may be recouped when individuals are awarded SSI benefits.

To be eligible for GA, individuals are required to complete, sign, and submit an application for SSI and an Interim Assistance Authorization (IAA) ([SDS 7814A](#)) to SSA. The SSI application and the IAA agreement must be received by SSA to be eligible to receive GA benefits. The IAA is an agreement between the individual, the Social Security Administration (SSA), and the department, which allows the department to be reimbursed for GA payments made to the individual when the individual is awarded SSI benefits. Payments are recouped from the individual's initial SSI lump-sum payment.

To qualify for GA, individuals and couples must be receiving OSIPM Presumptive Medicaid medical benefits. GA individuals and couples must also be homeless or at risk of losing their housing within 90 days. GA is only provided to childless individuals or married couples between the ages of 18 and 64 ([OAR 461-135-0700](#)).

If a GA client is denied SSI, they are required to appeal that decision. GA benefits may continue until the individual is denied at the Social Security Administrative Law Judge (ALJ) level. The Department has Disability Benefits Liaison (DBL) staff to assist clients with applications and appeals for Social Security benefits.

Application Process

The General Assistance program is a benefit available to OSIPM Presumptive Medicaid individuals who are homeless or who are losing their housing within 90 days. Potential GA individuals can be referred to the GA Program using the [Disability Benefits Liaison-General Assistance Referral form](#) (DE 4640). A separate GA application is not required.

Payment Standard

GA Benefits will include housing assistance, utility assistance, and a personal incidental fund. The payment standard is as follows ([OAR 461-155-0210](#)):

GA Benefit Type	One-Person Payment Standard	Two-Person Payment Standard (with two OSIPM eligible spouses)	Two-Person Payment Standard (with one OSIPM eligible spouse)
Housing Assistance	Up to \$615	Up to \$921 (total for both spouses)	Up to \$921 minus adjusted income, but no more than \$615
Utility Allowance	\$103	\$157	\$157
Personal Incidental Fund	\$69	\$106	\$106

GA consumers will also receive free assistance with the Social Security application and appeals process. GA housing, utility, and personal incidental payments can be recouped by the department when GA consumers are awarded Supplemental Security Income (SSI).

Worker Guide

Referral Process

Local office refers individuals who allege severe physical and/or mental health conditions *and* who are homeless or at imminent risk of homelessness to CDDU using the [Disability Benefits Liaison \(DBL\)-General Assistance \(GA\) Referral Form](#) (DE 4640). An individual will be evaluated for the GA program if the box stating "Customer is experiencing homelessness or is at risk of homelessness" is checked.

Overview

If the individual is eligible for General Assistance, but not receiving OSIPM-Presumptive Medicaid, CDDU will make an OSIPM-Presumptive Medicaid disability determination first. If an individual meets OSIPM-Presumptive Medicaid disability impairment criteria, the CDDU will complete a full OSIPM eligibility determination.

Note: *If there is a waiting list for the General Assistance program, CDDU will make an OSIPM-Presumptive Medicaid disability determination when there is space available in the GA program.*

Screening for Homelessness Criteria

CDDU staff who screen consumers must determine whether the individual is homeless or is at risk of becoming homeless within the next 90 days.

Individuals live in many different settings and situations. These are broken down into three categories:

Category A

- Individual presently lives in his/her own dwelling and is liable to pay the rent amount on his/her own legally binding lease or rental agreement **OR** owns the dwelling.

Category B

- Individual presently lives in and has lived in a single dwelling owned, rented or leased by another person for longer than 90 days, **OR**
- Individual presently lives in and has lived in a single, separate dwelling on property owned, rented or leased by another person or entity for longer than 90 days.

Category C

- Individual presently lives in and has lived in a dwelling owned, rented or leased by another person or entity for fewer than 90 days, **OR**
- Individual presently lives in and has lived in a separate dwelling on property owned, rented or leased by another person or entity for fewer than 90 days, **OR**
- Individual is essentially transient but is usually sheltered, **OR**
- Individual is presently staying at a rescue mission, shelter, or halfway house, **OR**
- Individual has no dwelling.

Individuals whose living arrangements lack consistent access to power, running water, food preparation and storage, and toilet facilities (i.e., tents, sheds, recreational vehicles, abandoned buildings and automobiles) are considered homeless regardless of category.

Individuals who live in recreational vehicles, campers, camp trailers, or boats which have consistent access to power, running water, food preparation and storage, and toilet facilities are not considered homeless. These individuals may be considered at risk of homelessness if they are unable to pay necessary rent for a space, lot, slip or moorage depending on which Category best describes their living situation.

Individuals are considered at risk of homelessness if the individual provides verification ([OAR 461-115-0700](http://www.oregon.gov/oha/ohsr/461-115-0700)) that they are required to leave their place of residence within the upcoming 90 days.

CDDU staff who screen individuals should advise these individuals of the need to provide verification of housing status (according to the individual's category) at intake, as set forth below.

Step 1: Screening Process

CDDU receives the DBL-GA referral, and a CDDU staff member pre-screens the individual for potential GA eligibility as follows:

- Ask individual if an SSI claim has been filed with SSA (see Intake section below for more information on what actions to take)
- Determine the Category to which the applicant's living situation belongs:
 - **Category A** applicants must provide a current, dated, and time-certain written eviction notice in order for the individual to be considered at risk of homelessness.
 - **Category B** applicants must provide a current, dated, and time-certain written eviction notice **OR** a current, time-certain verbal or dated written eviction statement directly from the owner or lessor of the dwelling or property in order for the individual to be considered at risk of homelessness.
 - **Category C** applicants, an individual's self-attestation that he/she is homeless or at risk of homelessness within the next 90 days is sufficient evidence of being homeless or at risk of homelessness.
- The CDDU staff member completing the pre-screening should advise the applicant what sort of verification, if any, of the applicant's homelessness status will be required at the GA intake.

If the applicant has a valid physical address at the time of the pre-screening, the CDDU staff member completing the pre-screening must make note of the physical address, describe the applicant's living arrangement, and inform the intake Disability Analyst (DA) of what Category of homelessness status verification, if any, will be required at the GA intake.

Receipt of non-GA rental assistance:

- Consumers in Section 8 or other Public Housing program governed by 24 CFR Part 960 do not meet the definition of "homeless" or "at risk of homelessness."

- The GA applicant’s receipt of non-GA housing assistance will be presumed to disqualify the applicant from the GA program. Excluding those consumers in (1) of this section, this presumption can be rebutted based upon information provided by the non-GA assistance program. In order to rebut this presumption all of the following must be met:
 - A completed 3010 authorizing ODHS-APD to communicate directly with the non-GA assistance program worker must be collected to initiate the rebuttal process.
 - The non-GA assistance program must verify GA PIF + Utility (\$150) is not counted against the non-GA housing assistance provided.
 - The non-GA housing assistance must be from one of the following sources:
 - Temporary assistance from an organization listed in SSA POMS SI SEA00830.605 (C), Oregon.
 - Federally subsidized housing dependent upon GA PIF + Utility (\$150) to qualify for the non-GA housing assistance.
 - Temporary assistance from an organization that meets the SSA definition of Housing Assistance Based on Need (ABON) per SSA POMS SI 00830.175 and is funded entirely by the State of Oregon, one of its political subdivisions or a combination of such jurisdictions.

Step 2: Intake Process

- Determine if an SSI claim has been filed with SSA. This can be verified via a phone call to SSA, via the SSA website, or via written confirmation from SSA. If there is no current claim pending, refer the individual to the local SSA office or to the SSA phone number to arrange an interview date.
- When a DA completes an intake with a GA applicant, the DA must document and (as needed) verify the applicant’s homelessness status. If the applicant has a physical address at the time of GA intake, the DA must make note of the physical address and describe the applicant’s living arrangement.
- The GA intake documents, along with any verification relating to the applicant’s homelessness status, should be sent to the “Referrals PMDDT” inbox.

- If the individual applied using a DHS 3053 and is not already receiving MAGI, see instructions below in Step 5, Local APD/AAA branch responsibilities.

Step 3: Presumptive Disability Determination

The Presumptive Medicaid Disability Determination Team completes the disability determination for General Assistance. A separate disability determination is not required.

- PMDDT determines whether the applicant is disabled. If PMDDT determines that the individual is disabled, then CDDU's HSS3 staff will process the application.

Step 4: OSIPM Financial Determination

- HSS3 staff will confirm the applicant's physical address at the time that the application is processed. If the individual's physical address is the same at the time that the application is processed that it was when the GA intake took place, then the applicant will not be denied GA on the basis of not meeting GA's homelessness criteria.
- Determine financial OSIPM-Presumptive eligibility:
 - If ineligible, send 540 denial notices for OSIPM and GA.
 - If eligible, proceed to next step.

Step 5: GA Eligibility Determination

If GA is approved:

- Have the individual sign the [ODHS 7814A Interim Assistance Agreement](#) (IAA). The IAA must be submitted to SSA before GA eligibility can begin.
- Check MMIS again to make sure individual wasn't approved for MAGI in the interim – if individual has MAGI, see the *CDDU and 5503 Coordination* section below.
- Open the OSIPM and GA case in the geographically appropriate branch.
 - CDDU will maintain GA benefits portion.

- APD/AAA will maintain the OSIPM portion and manages and maintains the renewal process in cooperation with CDDU.
- If the individual does not have an attorney or other appointed SSA representative, the DA shall offer representation to the consumer and, if accepted, complete the SSA 1696 form
- If needed, the DA will also assist individual with completing the SSA 3369 form and the ADL function report.

CDDU Responsibilities

- Determine GA eligibility.
- Send OSIPM-Presumptive approval and denial notices.
- Send all GA notices (approval, denial, closure).
- Enter and maintain GA Medical Related Payments (MRP) in ONE.
- Narrate all actions.
- Monitor monthly ONE report for changes to GA consumer information made by other programs within the last 30 days, including changes to:
 - Income.
 - Address.
 - ONE Case Status (discontinued/inactivated cases in ONE that still have active GA benefits).

Local APD/AAA branch responsibilities

- If an individual is under 65 and not receiving SSI, the individual is evaluated for MAGI with the application processed in ONE.
 - Local APD/AAA office processes the application for services and sends an AVS request:
 - Provide the applicant with a 7210.

- route it to the ONE Customer Service Center at oregon.benefits@odhsoha.oregon.gov for a full eligibility determination.
 - Applicants for medical benefits may also apply using the ONE Applicant Portal at <https://one.oregon.gov> or by calling OHA at 800-699-9075.
- If an individual does not qualify for MAGI, the individual will be evaluated for OSIPM.
- If a MAGI recipient comes to an APD/AAA office and wants to apply for GA, APD/AAA will refer to the Collaborative Disability Determination Unit (CDDU) those individuals alleging:
 - Homelessness or at imminent risk of experiencing homelessness; and
 - Physical and/or mental health conditions that will keep them from working for 12 months or will result in death.
- If the individual's first stop is an APD/AAA branch and the individual alleges meeting the above requirements regarding disability and homeless status:
 - Complete the Disability Benefits Liaison (DBL)-General Assistance (GA) Referral Form (DE 4640) on the individual's behalf.
 - Email the form to the CDDU at dbl.referral@odhsoha.oregon.gov.
 - If there is no waiting list for GA:
 - CDDU will make a disability determination first.
 - If the individual is found disabled, CDDU will make the GA determination (including sending approval notices) and issue benefits through the ONE system. No further action is needed by APD/AAA staff unless the individual contacts the branch to report changes.
 - If the individual is not found disabled, CDDU will send the denial notice for GA, no further action is needed by APD/AAA staff.
 - If there is a waiting list, CDDU will wait until there is an open spot before making the disability determination.
- Process SNAP and service requests timely – don't forget the expedited SNAP deadlines. Most GA intakes take place at SSP office, and most

GA applicants are younger than 60 and have not yet been determined to be disabled. It is unlikely that APD offices would process many SNAP applications from GA intakes.

- The GA case should remain active in Oregon Access; however, all GA payments must be processed through the ONE system.

Coordination between CDDU, 5503 and APD/AAA

CDDU and 5503 Coordination

- Coordination for opening case: Refer to section B.6 of the APD MAGI Worker Guide for individuals who are receiving MAGI benefits.
- When new information is received by CDDU about an individual receiving GA benefits and this information is missing from the consumer's case in the ONE system, the HSS3/4 will notify branch via case transfer email address of the new information.

CDDU and APD/AAA Coordination

CDDU and APD/AAA staff should work together to ensure that the medical renewal process is managed and maintained.

GA Medical and SNAP

- If problems arise, contact branch via branch case transfer email address to fix SNAP issues.
- If the problem includes SNAP not properly accounting for GA, the following guidance should be shared with the branch:
 - If an Oregonian is receiving General Assistance (GA Medical Related Payments), these payments are considered unearned income for SNAP, are already counted automatically by the ONE system and should not be coded separately.
 - Shelter or utility expenses incurred by the consumer should be entered and coded for SNAP.

GA Rental Assistance Check Issuance

To authorize and issue GA rental payments, the consumer must:

- Provide verification of a valid rental agreement as defined by ORS 90.100.
- If not already provided in the rental agreement, verify the following:

- Address of the rental property.
- Name and mailing address of the landlord or landlord's agent as defined by ORS 90.100.
- Monthly rate of rental payment.
- Start and end date of fixed term tenancy as defined by ORS 90.100.
- In no case shall a payment for GA consumer's rental assistance be issued to pay for any of the following:
 - Rent owed prior to acceptance into the GA program.
 - greater than 90 days prior to the authorization of such payment.

ODHS is not a party to any rental agreement.

ODHS issues rental assistance via check mailed directly to landlord or landlord's agent.

The landlord and landlord's agent are considered third-party payees.

A third-party payee is not a client of the GA program.

Social Security Decisions

When the Social Security Administration (SSA) notifies the individual of their decision, the DA will:

- If approved, notify the CDDU HSS3/HSS4 so they are alerted to the fact that SSI payments will be starting soon.
- If denied, and not represented, contact the individual to arrange a face-to-face meeting to assist the individual with filing a request for appeal. If the individual is represented, confirm that the appeal is timely filed.
 - The DA shall obtain new or updated medical records to support the appeal. If the DA is not the individual's representative, the DA shall only obtain new or updated records if the individual's representative requests it.
- The DA forwards the completed appeal forms to the SSA.
 - If the individual appeals the SSA denial within the deadline, the GA and OSIPM can remain open until the SSA claim is approved or until the SSA claim is denied at the Administrative Law Judge level.

- If the individual does not appeal the SSA denial within the deadline:
 - The DA will assess whether there is good cause for late filing and assist if appropriate.
 - The CDDU will communicate and coordinate with the local APD/AAA branch on the OSIPM and GA closure.

The CDDU will send the GA closure notice.

Eligibility Requirements

[461-135-0700](tel:461-135-0700)

Medical benefits

- GA individual must be receiving OSIPM – Presumptive Medicaid medical assistance.

Age

- GA individual must be eighteen years of age or older and less than 65 years of age.

Disability

- GA individual must meet OSIPM impairment criteria (i.e., must be disabled for at least 12 months because of a physical or mental health impairment).
- GA individual must apply for SSI.
- GA individual must sign an Interim Assistance Agreement ([7814A](#)).

Specific requirements

Must be one of the following:

- Individual with no minor child in the household group who meets the disability requirements; or
- Couple with no minor child in the household group where both meet the disability requirements; and
- Be ineligible for TANF, non-presumptive OSIP(M) and REF.

Benefits

GA Benefits include housing assistance, utility assistance, and a personal incidental fund. The payment standard is as follows ([OAR 461-155-0210](#)):

GA Benefit Type	One-Person Payment Standard	Two-Person Payment Standard (with two OSIPM eligible spouses)	Two-Person Payment Standard (with one OSIPM eligible spouse)
Housing Assistance	Up to \$615	Up to \$921 (total for both spouses)	Up to \$921 minus adjusted income, but no more than \$615
Utility Allowance	\$103	\$157	\$157
Personal Incidental Fund	\$69	\$106	\$106

Housing Assistance

- The amount of housing assistance is either the individual or couple's rent amount, or the payment standard listed above, whichever is less (housing assistance cannot exceed the standards listed above)
- The amount determined above is reduced by any adjusted income the individual or couple has.
- To determine adjusted income, you must first determine countable income. It is different than countable income for OSIPM, so you will need to determine the countable income for OSIPM and then modify it as follows:
 - In-kind income (earned and unearned) is excluded.
 - Add any shelter-in-kind in the form of housing or utility assistance provided by community partners or other nongovernmental agencies. The amount to add is the amount paid to the individual or to a third party for shelter expenses.
- Once you have determined the countable income amount, subtract the following in this order:
 - One standard deduction of \$20 from unearned income first, and any left-over is deducted from earned income (if any)

- One standard earned income deduction of \$65
 - Deductions for documented impairment-related work expenses (rarely seen)
 - One half of the remaining earned income
 - An income deduction for documented blind work expenses (also rarely seen)
- The result is the adjusted income, which is subtracted from the housing allowance payment standard to determine the housing payment.

Utility Allowance and Personal Incidental Fund (These payments are not affected by the individual's or couple's income.)

- GA individuals will also be offered free assistance with the Social Security application and appeals process.
- GA housing, utility, and personal incidental payments can be recouped by the department when GA individuals are awarded Supplemental Security Income (SSI).
- As of 4/1/21, GA recipients can continue to receive housing assistance for one calendar month following the month of incarceration if both of the following are true ([OAR 461-135-0950](#)):
 - The Department can determine that the individual will be released before the end of the calendar month following the month of incarceration; and
 - The housing arrangement is still available.

Note: If the release date is later than the month following incarceration, housing benefits will close after a timely notice has been sent.

Effective Date

Benefits generally begin the **first of the month following the month in which all of the eligibility requirements are met.** Eligibility requirements are as follows:

- The individual was approved for presumptive OSIPM.
- The individual was determined to be homeless per GA rules.
- The individual signed the interim assistance agreement.

- The individual applied for SSI.
- **Exception:** If the individual filed for SSI in any month prior to the month he/she requests GA, benefits can begin on the date the individual requested GA benefits, if all other eligibility requirements are met. If all other requirements were not met on the date of request, then benefits begin on the date the individual meets all eligibility requirements. Because this may result in benefits beginning in the middle of the month, benefits will be pro-rated.

Notice Requirements

CDDU sends a 541-approval notice for GA. OSIPM approval notices are auto generated.

A basic decision is sent when GA and/or OSIPM is denied – OSIPM and GA notices must be sent separately.

A timely notice must be sent to end or reduce GA benefits, except as follows:

- No notice is required to reduce housing assistance payments when a change results in decreased rent ([OAR 461-175-0224](#)).
- No notice is required to end the housing assistance payment when a GA recipient moves out of state or there is a loss of housing ([OAR 461-175-0210](#)).