

District 1 OPI-M Implementation Plan

General Process:

- APD will take the initial calls for OPI-M (beginning in Phase 3)
 - Secure email will be used for referrals from CAT to APD. The subject line will indicate “OPI-M” for ease of flagging/separating emails. Email will contain all relevant client information needed to initiate the eligibility process.
- Once APD receives the case from screening, it will be assigned to an OPI-M-trained Eligibility Case Manager (ECM). All APD case managers will be trained on OPI-M.
- ECMs will submit OPI-M referrals to APD Central Office to complete financial eligibility.
- Once assigned to an ECM, APD coordinates with CAT to have the SCM available for the scheduled assessment so both CMs can be present.
 - If this cannot happen, APD CM completes service assessment then informs the consumer of the next steps, who will take the case from AAA.
 - ECM and SCM – phone conversation to ensure all information is passed on, observations, discuss any questions, etc.
- Warm hand-off: Once the eligibility assessment has been completed, (service planning and notice sent to AAA case manager) the ECM communicates with consumer to inform them of the eligibility decision. If eligible, they also let them know that their ongoing Service Case Manager (SCM) at CAT will be in contact with them within three business days.
- SCM will receive the case, initiate contact with the client, complete the service planning, and hold the case until the annual reassessment.
- Once a case is ready for annual reassessment, the ECM will pull a report of OPI-M clients due for reassessment or the SCM will provide the ECM with a monthly list of OPI-Clients that are due for reassessment the following month.
- During Phase 3 and 4, ECMs will directly screen consumers for OPI-M and eligible clients will have a warm hand-off to DAVS and the SCM will contact the consumer within three business days.

Phase 1:

Phase 1 will begin on or before June 3, 2024, and will include approximately 18 consumers, broken down as follows:

- Ten consumers from our OPI waitlist. These consumers will be the first 10 consumers with the highest waitlist scores on the list. Special consideration will be given to consumers that have a terminal illness, are on hospice or are from an underserved community.

- Six current OPI clients that have been have SPLs lower than 13 but who didn't qualify for Medicaid at the time.
- 2 high needs clients from CAT's Family Caregiver Program.

Referrals to APD during Phase 1 will either be made via secure email or Teams channel, using the General Process guidelines detailed above. Additional referrals during Phase One will be considered based on capacity. APD will take 10 per month in order to get through entire waitlist by phase 2. If APD is unable to meet the deadline, by November, APD will add in lead worker to take additional cases. If necessary, they will extend current cases out to be able to get through all of the waitlisted clients. CAT will have both the Program Manager and the Lead Care Coordinator jumped in to do the remainder of the cases.

If consumers are not eligible for OPI-M, the ECM will notify the SCM, and they will be referred back to CAT/the ADRC for other resources that may be available to them.

Phase One will be completed on or before December 1, 2024.

Phase 2:

Phase 2 will begin on or before December 1, 2024.

During their annual reassessments, all current OPI and OPI pilot clients will be offered OPI-M by their SCMs. Additionally, consumers contacting the ADRC and inquiring about in-home services, receiving Options Counseling or consumers enrolled in the Family Caregiver Support Program will be given information about OPI-M. In these situations, SCMs or I&R Specialists will use talking points and/or documents provided by APD Central Office to explain OPI-M and its benefits.

Referrals to APD during Phase Two will be made via secure email using the General Process guidelines detailed above.

Phase 3:

Phase 3 will begin on or before December 1, 2024. (APD is working on this phase)

- Identify how existing TXIX consumers will be informed about OPI-M as a new service option.
 - During reassessments, current case managers will talk to our consumers about OPI-M using document created by OPI-M team, cheat sheets, talking points. We will discuss the differences of each program so the consumer is well informed and can make decisions more appropriate for them.
- Identify how new consumers contacting the APD office are screened and offered OPI-M.
 - Local Office staff will have talking points and cheat sheets on OPI-M to share with anyone who walks into our offices inquiring about LTC services. We will also use the same information for folks who call into our office.

If consumers are not eligible for OPI-M, the ECM will notify the SCM, and they will be referred back to CAT/the ADRC for other resources that may be available to them.

Phase 4:

Phase 4 will begin on or before March 1, 2025

OPI-M will be fully implemented and integrated into the service options offered by APD and CAT and cross referrals for the program will be made by both agencies. Websites and collateral material will be updated to promote the new program and outreach events will feature promotions for OPI-M

Central Office will be notified at least 30 days in advance if the deadlines outlined in phases 1-4 cannot be met. CAT will be monitoring the plan for progress toward goals. Should deadlines not be met, APD and CAT will reassess the situation, determine steps to take in order to put the plan back on track, propose changes to the timelines, and move forward in meeting the new goals.

This plan is approved by both the APD District Manager and Daniel Brown, CAT Executive Director.