

District 15/ Clackamas County AAA

OPI-M Implementation Plan

General Process:

- Beginning in May 2024, all current OPI consumers, those on the OPI waitlist, and Family Caregiver Support Program care recipients will be screened for OPI-M using a screening tool designed to identify those potentially eligible, interested, and most high need/at risk. In total, roughly 250 consumers will be evaluated for appropriateness of referral to OPI-M prior to Phase 1.
- The Clackamas County APD Intake Team will take the initial calls for OPI-M (beginning in Phase 3)
 - Secure email or a dedicated Teams channel will be used for referrals from ADRC 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.
0311.apdcasetransfers@odhsoha.oregon.gov
- Once APD receives the case, it will be assigned to an OPI-M-trained Eligibility Case Manager (ECM). Dedicated OPI-M intake staff are centralized in one unit, but all APD case managers will be trained on OPI-M for choice counseling.
- ECMs in APD Central Office will complete financial eligibility.
- 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 ADRC will be in contact with them within three business days.
 - APD case manager completes transfer template and APD Central Office will review our transfer template and adjust the document such as ‘hours determination, preference of the consumer, HCW plans, waiting on a care agency, etc.

- SCMs will receive the case, initiate contact with the client, complete the service planning, and hold the case until reassessment; based on future policy.
- Once a case is ready for 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 ADRC 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 12 consumers per month or 3 consumers per week as follows:

- Beginning June 2024 – AAA and APD agree to send 3 referrals a week to start. We can increase this amount if we discover APD can assist with more weekly referrals. The referrals will be sent to APD 0311 case transfers email 0311.apdcasetransfers@odhsoha.oregon.gov box with OPI-M referral in the subject line of the email. APD Admin staff will then send the referral to the appropriate location for the financial portion to be completed and then assign this case to an APD intake case manager. Target completion date for phase 1 will be December 2024.
- Assess consumers from our OPI waitlist. These consumers will be the first consumers with the highest waitlist scores. Special consideration will be given to consumers that have a terminal illness, are on hospice or are from underserved communities; LGBTQIA2S+, rural, Black, Indigenous, People of Color, those whose 2nd language is English, and those with low incomes.
- Current OPI clients that have been approved for additional hours of in-home services/month due to high care needs.
- Those with high risk scores according to the FCSP/RAPP risk tool, from Clackamas County'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.

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

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

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

- During their annual reassessments, all current OPI clients who have not been offered OPI-M already 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 who haven't already been offered OPI-M will be given information about OPI-M. In these situations, SCMs, I&R Specialists, and Family Caregiver Support Program staff will use talking points and/or documents provided by APD Central Office to explain OPI-M and its benefits.
- AAA will continue to send the referrals to APD 0311 case transfers email box with OPI-M referral in the subject line of the email. APD Admin staff will then send the referral to the appropriate location for the financial portion to be completed and then assign this case to an APD intake case manager.

Phase 3: will start no later than December 2024. (APD is working on this phase)

- APD will offer OPI-M as a service option when current LTSS in-home consumers are due for an annual reassessment.
- APD will offer OPI-M and provide choice counseling with new consumers applying for LTSS in-home services.

APD will develop a workflow for internal referrals:

For internal referrals who move from LTSS to OPI-M, the process will be for the current APD case manager who has these cases to transition the case and then the case will be held by one of the AAA OPI-M case managers. All case managers will have completed available OPI-M trainings and will contact the OPI-M case managers and/or leadership for questions or assistance needed with these cases.

APD will develop a workflow for new consumers inquiring about in-home assistance:

New consumers will inquire about in-home assistance and APD will create a workflow to make sure these consumers are aware of all programs offered including OPI-M. Each office has a Worker of the Day (WOD). One option could be to transfer the consumer to the WOD for in-home services questions. This will be finalized by December 2024.

APD will house OPI-M brochures and applications at the front reception areas of all D15 APD locations. APD will also create an OPI-M chat via TEAMS for consumers who walk into the office and have questions about OPI-M. This chat will include the OPI-M point case managers and leadership to be able to answer questions if front line staff aren't able to answer and provide the opportunity to meet with the consumer face to face to answer questions about OPI-M and/or in-home services.

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

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 ADRC 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.

As of March 2025, this implementation plan will remain the same for the public launch unless processes need to be changed.

Central Office will be notified at least 30 days in advance if the deadlines outlined in phases 1-4 cannot be met.

Questions/Ongoing work:

- Is there written communication that the ECM can provide to the consumer in their initial packet regarding the process, shared documents, etc.?
- Can we create a Teams channel where Clack Co AAA and APD can readily communicate and share documents?
- Will APD Central Office provide a report or "live" rotation document that allows APD and AAA case managers to see the clients coming up for reassessments and the case managers assigned to those clients?