

Multnomah County Community Services OPIM Implementation Plan

06-17-2024 Updates

State Instructions: The implementation plan must include the following:

- The plan should provide a **step-by-step process that all staff working with OPI-M cases can follow** when working with individuals requesting or potentially eligible for OPI-M.
- The plan should include **referral and communication processes**.

Response:

Community Services mapped the entire OPI-M process.

Stakeholders are identified:

- State partners
- Community Services ADRC team
- Community Services OPI-M team: ECM (Eligibility Case Managers), Case Manager Assistant(CMA), OPI-E Case Manager (CM)
- Community Services Contract Liaisons (CL)
- Community Services Administrative Support team: Office Assistance (OA), Program Technician (PT)
- Community Services QA/Data Quality/Training team
- Partner Organizations: SCM (Service Case Managers)
- ADVSD LTSS teams: Screening, Case Managers, Eligibility Workers
- ADVSD Division Director and Division Budget Manager

Process related activities:

- Workgroups are created
- Referral process mapped
- Training needs are identified
- Project Communication Plan is developed
- Communication Plan for Community Services and Partners is created
- QA tools and metrics that are currently being used or are being developed identified

Supporting documentation:

Process Maps:

1. OPI-M Big Picture 4.2
2. OPI-M ECM Detailed Process 4.22
3. OPI-M SCM Detailed Process 4.18

4. OPI-M Service Billing 3.12
5. OPI-M Referral Scenarios 4.18
6. OPI-M Communication Plan
7. OPI-M Partner Communication Plan
8. OPI-M UCR Workflow.drawio

Tools:

1. OPI-M Readiness Checklist
2. OPI-M MOW-Case Transfer-Template-4.2024
3. LTSS & OPI-M Comparison Chart

- It should also specify the **timeline the local area will use to implement OPI-M.**
 - **Phase 1: June 3, 2024 - End of August 2024**
 - Waitlisted high/moderate Risk score
 - Recert SPL (1-8)
 - **Phase 2: September 2024 - November/December 2024**
 - Waitlisted moderate/low Risk score
 - Recert SPL (1-8)
 - **Phase 3: December 2024 - February 2025**
 - Waitlisted moderate/low Risk score
 - Recert SPL (1-8)
 - LTSS recertification consumers
 - **Phase 4: March 2025**
 - Waitlisted after May 1st, 2024
 - Remaining OPI/OPE existing recertification consumers
 - LTSS recertification consumers
 - New consumers

OPI Waitlist assignments by OPI-M Phases

	Jun '24 - Aug '24	Sept '24 - Nov '24	Dec '24 - Feb '25	
<i>Program</i>	WL_Phase 1	WL_Phase 2	WL_Phase 3	Total
OPI Expansion	16	6	8	30
OPI Services	56	128	95	279
Transportation	0	0	0	0
Grand Total	72	134	103	309

Table 1: The OPI Waitlist Projections contains both OPI-Classic and OPI-E waitlisted clients. Waitlist OPI projected numbers are assigned to each OPI-M phase sorted by Risk Score. Phase 1 assesses High and Moderate risk score waitlist clients. Phase 2 assesses Moderate and Low Risk Score waitlist clients. Phase 3 assesses Low Risk Score and No Score waitlist clients.

OPI Recertification Projections by OPI-M Phases (Phase 1,2,3 SPL 1-8)

	Jun '24 - Aug '24	Sept '24 - Nov '24	Dec '24 - Feb '25	
<i>Program</i>	Phase 1	Phase 2	Phase 3	Total
OPI Expansion	3	1	3	7
OPI Services	20	24	22	66
Grand Total	23	25	25	73

Table 2: Current OPI-Classic and OPI-Expansion client numbers to be reassessed for OPI-M in each OPI-M phase by OPI program. Phase 1-3 prioritizes clients with SPL 1-8. In Phase 3 when LTSS clients are offered OPI-M, it is unknown how many clients from LTSS will convert to OPI-M.

Phase 1 – Starting no later than June 3, 2024

- The **process used to identify the priority individuals** who will be assessed from the current OPI and OPI Pilot waitlist or current OPI and OPI Pilot individuals with high care needs.

Response:

How the decision was made:

- The UCR, Tableau, OAccess data, Transmittal # APD-AR-24-015.
- Considered balancing the workload by partners' caseload numbers. This ensures our partners have an equitable opportunity to provide OPI-M services to their clients within their capacity.
- Considered client duration on Waitlist to provide services sooner to clients on the waitlist longer
- Utilized client projection spreadsheet to forecast operational capacity. Considerations were made for implementation of new processes.

Priority list will combine:

- *Waitlisted* OPI & OPI-E consumers with a high Risk Assessment Tool score*.
- *Existing* OPI & OPI-E consumers with recertification due in Phase 1 months (June, July, August), with high needs score, CAPS SPL 1-8.**
- Partner organizations will continue with CAPS for remaining *existing* OPI & OPI-E consumers with recerts due in Phase 1:
 - a. Those consumers will remain in OPI & OPI-E programs until their next recertification is due. This ensures the continuation of their *existing* benefits.
 - b. This also addresses the Community Services ECMS' anticipated capacity.

Supporting documentation:

*The Risk Assessment Score = score from the UCR Risk Assessment Tool = *high, moderate, low*. This is used to identify first priority consumers for Phase 1. The Community Services will start with the "*high*" risk score consumer assessments.

**To aid in the prioritization process, Community Services identified the CAPS SPL scores 1-8 as those reflecting the *high need level* of care. This is an additional priority criteria used in Phase 1.

- **Identify any additional groups that will be prioritized.** This may include family caregivers, those at-risk of institutionalization, individuals with limited English proficiency, individuals residing in rural areas, other historically underserved populations, etc.

Response:

Community Services' Partners include Enhancing Equity and Culturally Specific organizations that provide services to individuals from historically underserved populations and/or individuals with limited English proficiency groups.

Community Services is working closely with its partner organizations and incorporating their feedback in developing priority lists.

No additional groups were included in Phase 1 due to high numbers of *waitlisted* and *existing* OPI & OPIE consumers due for recertification.

There will be a consideration for some of the current OPI/OPIE CAPS completed in the last 6 months to be "transitioned" to the OPIM CAPS (with all outlined by the State requirements.)

Supporting documentation:

N/A

- Include **specifics on how referrals will be made between the AAA and APD offices, the number of referrals and the frequency.**

Response:

- In Multnomah County Community Services ECMs will make referrals to partner organizations' SCMs.
- Each partner organization identified a point person to contact at their organization for OPIM consumers that are ready for an SCM.
- After OPIM is approved for each consumer, the ECM will contact that agency's point person. The ECM is then given the name of the receiving Case Manager SCM, and will send an email/or google chat in some instances informing SCM with extra detail that is not in the CA/PS.
- The SCM will be assigned in UCR and Oregon Access by the Case Manager Assistant. Exception: The ECM will reach out to the SCM to schedule a joint home visit if the consumer is already case managed (OPI) by this partner organization.

Number of referrals: UCR data for prioritized consumer groups for Phase 1*.

Frequency: Upon completion of eligibility determination.

Supporting documentation:

*Phase 1 prioritized consumer list numbers spreadsheet.
OPI-M UCR Workflow.drawio

- Identify a **target completion date for phase 1.**

Response:

Target Date: Aug '24. Projecting variables in capacity, target completion date may be extended to Jan '25.

Supporting documentation:

See numbers above

Phase 2 – Starting no later than December 2024

- Identify how **existing OPI and OPI Pilot individuals will be screened and offered OPI-M**. Plan must include language for OPI and OPI Pilot individuals to be offered OPI-M at their annual reassessment.

Response:

Anticipated target timeline:

- The focus will be on:
 - *Waitlisted* consumers with *moderate* and *low* Risk Assessment Tool scores*
 - *Existing* OPI & OPI-E consumers with SPL 1-8 with recertification due in Phase 2 months**.
- Partner organizations will continue with CAPS for remaining *existing* OPI & OPI-E consumers with recerts due in Phase 2 months:
 - Those consumers will remain in OPI & OPI-E programs until their next recertification is due. This ensures the continuation of their *existing* benefits.
 - This also addresses the Community Services ECMS' anticipated capacity.

Communication:

- Multnomah County Community Services and its partners will utilize available state tools to communicate and offer the new OPI-M program to consumers.
- Multnomah County has a workgroup between partners and Community Services to develop and coordinate communication with clients.

Supporting documentation:

*The Risk Assessment Score = score from the UCR Risk Assessment Tool = *high, moderate, low*. Community Services will continue with the "*moderate*" and "*low*" risk score consumer assessments.

**To aid in the prioritization process, Community Services identified the CAPS SPL scores 1-8 as those reflecting the *high need level* of care. This group will continue in Phase 2.

- Identify how **new individuals** contacting the ADRC or AAA offices are **screened and offered OPI-M**.

Response:

- In Phase 2, new individuals will be offered to be added to the waitlist and assessed in order received.
- In Multnomah County new individuals contacting ADRC, partner organizations and LTSS

offices will be screened and offered OPI-M in later phases.

Supporting documentation:

N/A

- Provide **additional information on referrals between AAA and APD offices** if this will differ from Phase 1.

Response:

- Multnomah County anticipates utilizing the same workflow unless the needs for local process improvements are identified during the program roll out phases.

Supporting documentation:

N/A

Phase 3 – Starting no later than December 2024

- Identify how **existing TXIX consumers will be informed about OPI-M** as a new service option.

Response:

- Multnomah County Community Services are actively coordinating with the Multnomah County LTSS program team in developing communication workflow and identifying training needs. Multnomah County LTSS offices will have conversations with TXIX consumers about OPI-M if appropriate during recertification.

Note:

Multnomah County Community Services and LTSS will utilize available state tools to communicate and offer the new OPI-M program to consumers. Multnomah County has a workgroup between Community Services and LTSS to develop and coordinate communication with clients.

Supporting documentation:

OPI-M Referral Scenarios 4.18 (process map)

Phase 3 Additional Information

Q. Does the plan identify how existing LTSS individuals will be screened and offered OPI-M?

Community Services Response:

- In Multnomah County ADVSD/AAA Type B has two separate programs: the LTSS and the Community Services Program (CS). The LTSS provides Medicaid case management. The CS contracts with community based organizations to provide the OAA and the OPI programs case management. Due to this structure, all existing TXIX consumers are with the LTSS program case management.
- CS and LTSS developed communication tools for OPIM referrals during the TXIX consumers recertification process: the Smartsheet referral form and Narration templates to accompany the form.
- CS and LTSS mapped the following processes:
 - New OPIM consumers during phase 1-3 and separate for phase 4
 - Existing TXIX consumers starting in phase 3:
 - Consumers with changes to the SPL level (14-18)
 - Changes to financial status (over income/resources)
 - SPPC with the increased need for additional services hours
 - Consumer choice due to estate recovery etc

See Workflow/process maps:

- OPI-M Phase 3-LTSS Recert Referrals
 - OPI-M LTSS Referral Scenarios
 - OPI-M Eligibility Review-Multco
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- Identify how **new individuals** contacting the APD office are **screened and offered OPI-M.**

Response:

- In Multnomah County, LTSS offices will refer any new individuals interested in OPI-M to ADRC.

Supporting documentation:

OPI-M Referral Scenarios 4.18 (process map)

Phase 4 – Starting no later than March 2025

- Determine if **processes** will look different for the **public launch of OPI-M** or if they will follow **screening and referral processes** from previous phases.

Response:

- Multnomah County Community Services will continue with our developed/designed referral process, unless process improvement needs are identified in previous phases.
- ADRC will continue screening and referral processes as developed for Multnomah County Community Services and LTSS.

Supporting documentation:

OPI-M Big Picture 4.2 (process map)

- Please include any **barriers to meeting the implementation deadlines** and the **steps** that will be taken if the deadlines cannot be met.

Response:

- Multnomah County provides services to a high number of clients and has a high number of OPI / OPI-E waitlist consumers.
 - **Steps to reduce barrier:**
 - i. Modifying the Phase 1&2 prioritized consumers lists, including current OPI & OPI-E consumers for recertification in Phase 1. This extends the timeframe to address the workload volume.
 - ii. Working with our LTSS partners (ie. referral process, communication)
- Unavailable workload model specific to OPI-M to gauge anticipated workload
 - **Steps to reduce barrier:**
 - i. Assessing workload tasks during the program roll out. Gathering data on case management and administrative tasks during OPI-M rollout to perform ongoing Plan, Do, Study, Act.
- Anticipated workload increase for case managers, both for Community Services and Partner organizations. Anticipated Administrative support for both.
 - **Steps to reduce barrier:**
 - i. Assessing workload tasks during the program roll out. Gathering data on

administrative tasks during OPI-M rollout to perform ongoing Plan, Do, Study, Act.

- Training timeline too close to implementation.
 - **Steps to reduce barrier:**
 - i. Utilizing currently available training and local knowledge to prepare staff. Assistance with system access to prepare staff. Workgroups have been created to support training.
 - ii. Developed workflow maps for local processes to identify training needs and train staff
- Budget
 - **Steps to reduce barrier:**
 - i. Transparent communication with partner organizations with regular OPI-M updates to facilitate planning
 - ii. Forecasting and budget model development to address constraints
- The Central Office will be notified at least 30 days in advance if the deadlines outlined in phases 1-4 cannot be met.

Supporting documentation:

N/A