

Oregon Project Independence- Medicaid Rollout Plan for NWSDS

First Phase of Local Launch Part 1 (start 06/01/2024, continues through public launch 2025)

Key points:

- OPI CM's will be fully trained on OPIM
- No ADRC involvement anticipated until Dec 2024 when SPPC cases are introduced
- Entry point is not ONE with this proposed rollout option, later ONE will be an entry point
- Expect to learn about potential issues and work through problems manually
- Will need frequent huddles that are not only OPI Staff but QA/ES and QA/CM
- Expect payment processing hurdles
- No PMDDT or MED referrals needed except for OPI Pilot cases (very low number)

Focus Consumer Groups:

1. Existing OPI consumers up for renewal
2. Existing OPI consumers determined high risk from high-risk list
3. Existing OPI consumers identified by OPI CM's as needing additional supports
4. Consumers with APS concerns, etc. (existing due to safety concerns or an urgent need for care)
5. Existing OPI Pilot consumers up for renewal
6. Benchmarks and Goals

1. Existing OPI consumers up for renewal:

Each existing OPI consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic.

(CM intake script)

2. Existing OPI Consumers determined high risk from high-risk list:

OPI CM will contact consumer to discuss the program elements, eligibility, consumer expectations to participate (application, verifications, deadlines, etc.), and if the consumer wants to participate, they will schedule the intake assessment and complete the service plan and application as well as the AVS form at the visit. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic. (CM intake script & Intake Guide for Case Managers)

3. Existing OPI consumers by OPI CM's as needing additional supports:

OPI CM will contact consumer to discuss the program elements, eligibility, consumer expectations to participate (application, verifications, deadlines, etc.), and if the consumer wants to participate, they will schedule the intake assessment and complete the service plan and application as well as the AVS form at the visit. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic. (CM intake script & Intake Guide for Case Managers)

4. Consumers with APS concerns, etc. (existing consumers due to safety concerns or an urgent need for care:

The consumer will be contacted by the OPI-CM to discuss the program elements, eligibility, consumer expectations to participate (application, verifications, deadlines, etc.), and if the consumer wants to participate, they will schedule the intake assessment and complete the service plan and application as well as the AVS form at the visit. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic. (CM intake script & Intake Guide for Case Managers)

5. Existing OPI Pilot consumers:

The OPI Pilot consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan document at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. These cases will also need to be evaluated to see if PMDDT and/or MED is needed. Those processes will need to be explored and proper referrals made following those processes established by APD. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Pilot.

6. Benchmarks and Goals of phase 1:

The main goals for the months of June-July-August are minimal disruption of services to existing consumers and to pivot and adjust to any barriers that come about during the initial rollout. The other goal is to closely monitor the impact on the OPI Classic budget that has diminished greatly, we expect this to improve with additional funds in the first couple of months of OPIM due to state funds increasing. We hope to add 60%-75% of our renewals to the OPIM program each month in addition to our high-risk consumers and APS initiated cases. In the middle of phase 1 we plan to start working the Waitlisted consumers in September 2024 (through February 2025) at 30-40 per month. The financial processes should be solid by September. We now have 2 OPI ES in training. ADRC will not be included yet as the intakes will only come from the Waitlist in an effort to reduce the Waitlist and most high risk/priority consumers first. If we do not reach our 60%-75% goals by December we will revisit our

plan and make adjustments. If we are unable to achieve our enrollment goals by October 31st, we will revisit the plan and notify Central Office by November 15th, 2025.

Projected OPIM cases added June 2024 through Nov 2024: 360-465The OPI Pilot consumer renewal

Second part of Phase 1 Local Launch (start 09/01/2024, continues through public launch 2025)

Key points:

- Payment issues will likely be resolved by now
- Pulling OPI Waitlist cases will start
- We will continue working renewals and transitioning to OPIM
- XIX CM's will complete their OPIM training

Focus Consumer Groups:

1. **Continue existing OPI consumers up for renewal**
2. **Continue existing OPI Pilot consumers up for renewal**
3. **OPI Waitlisted consumers**
4. **Benchmarks and Goals**

1. Existing OPI consumers up for renewal:

Each existing OPI consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic.
(CM intake script)

2. Existing OPI Pilot consumers up for renewal:

The OPI Pilot consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan document at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. These cases will also need to be evaluated to see if PMDDT and/or MED is needed. Those processes will need to be explored and proper referrals made following those processes established by APD. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Pilot.

3. OPI Waitlisted Consumers:

The consumer will be contacted by the OPI-CM to discuss the program elements, eligibility, consumer expectations to participate (application, verifications, deadlines, etc.), and if the consumer wants to participate, they will schedule the intake assessment and complete the service plan and application as well as the AVS form at the visit. While financial application piece is being processed OPI CM will open

an OPI Classic Benefit/plan in the interim. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic.

4. Benchmarks and Goals of Phase 1: (Goals for part 1 and 2 of Phase 1 are combined)

The main goals for the months of June-July-August are minimal disruption of services to existing consumers and to pivot and adjust to any barriers that come about during the initial rollout. The other goal is to closely monitor the impact on the OPI Classic budget that has diminished greatly, we expect this to improve with additional funds in the first couple of months of OPIM due to state funds increasing. We hope to add 60%-75% of our renewals to the OPIM program each month in addition to our high-risk consumers and APS initiated cases. In the middle of phase 1 we plan to start working the Waitlisted consumers in September 2024 (through February 2025) at 30-40 per month. The financial processes should be solid by September. We now have 2 OPI ES in training. ADRC will not be included yet as the intakes will only come from the Waitlist in an effort to reduce the Waitlist and most high risk/priority consumers first. If we do not reach our 60%-75% goals by December we will revisit our plan and make adjustments. If we are unable to achieve our enrollment goals by October 31st, we will revisit the plan and notify Central Office by November 15th, 2025.

Projected OPIM cases added June 2024 through Nov 2024: 360-465

Phase 2 Local Launch (12/01/2024)

Key points:

- Continuing previous plan but adding SPPC recipients, ADRC to assign cases to OPI CM's after XIX CM complete their assessments
- XIX CM involvement for SPPC cases, they will do a SPPC assessment at renewal as well as a full CA/PS
- PHEU will be closed by this time giving us a better idea of potential SPPC transitions and their impact on the OPI classic funds
- PMDDT and MED process will be needed

Focus Consumer Groups:

1. **Continue existing OPI consumers up for renewal**
2. **Continue existing OPI Pilot consumers up for renewal**
3. **Continue OPI Waitlisted consumers**
4. **Add SPPC consumers up for renewal**
5. **Goals and Benchmarks**

1. Existing OPI consumers up for renewal:

Each existing OPI consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic.

(CM intake script)

2. Existing OPI Pilot consumers up for renewal:

The OPI Pilot consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan document at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. These cases will also need to be evaluated to see if PMDDT and/or MED is needed. Those processes will need to be explored and proper referrals made following those processes established by APD. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Pilot.

3. OPI Waitlisted Consumers:

The consumer will be contacted by the OPI-CM to discuss the program elements, eligibility, consumer expectations to participate (application, verifications, deadlines, etc.), and if the consumer wants to participate, they will schedule the intake assessment and complete the service plan and application as well as the AVS form at the visit. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic. (CM intake script & Intake Guide for Case Managers)

4. Consumers with APS concerns, etc. (existing consumers due to safety concerns or an urgent need for care:

The consumer will be contacted by the OPI-CM to discuss the program elements, eligibility, consumer expectations to participate (application, verifications, deadlines, etc.), and if the consumer wants to participate, they will schedule the intake assessment and complete the service plan and application as well as the AVS form at the visit. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic. (CM intake script & Intake Guide for Case Managers)

5. Benchmarks and Goals of phase 2:

The main goals for the months December 2024 to February 2025 is to begin the addition of SPPC consumers as well as continue adding the previous groups identified in Phase 1. We will continue to pivot and adjust to any barriers that come about during the initial rollout. The other goal is to closely monitor the impact on the OPI Classic budget. We hope to add 60%-75% (42-53) of our renewals and to the OPIM program each month in addition to our identified high-risk consumers and APS initiated cases. We also hope to add more momentum by adding 30-60 SPPC from XIX CMs at renewal. At this point ADRC involvement will be established and their script for consumer conversations as well as their ability to screen and assign will be in place. If we do not meet our goal to add 90-100 cases to OPIM each month we will revisit our plan and make adjustments. If we are unable to achieve our enrollment goals by January 31st, we will revisit the plan and notify Central Office by February 15th, 2025.

Projected OPIM cases added Dec 2024 through Feb 2025: 195-232

Forth Phase (03/01/2025) PUBLIC LAUNCH

Key points:

- ADRC involvement begins, they will utilize a script to determine referral path

Focus Consumer Groups:

1. **Continue existing OPI consumers up for renewal**
2. **Continue existing OPI Pilot consumers up for renewal**
3. **Everyone**
4. **Goals and Benchmarks**

1. Existing OPI consumers up for renewal:

Each existing OPI consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Classic.

(CM intake script)

2. Existing OPI Pilot consumers up for renewal:

The OPI Pilot consumer renewal will be evaluated for OPIM. CM will review script and determine if case is appropriate for OPI-M. This can be done by phone when scheduling or during the actual assessment visit. If they choose to participate the OPI CM will develop the service plan document at the visit in addition to the renewal tasks they already do at those visits. They will also gather as many pieces of information they can to complete the application as well as the AVS permission. These cases will also need to be evaluated to see if PMDDT and/or MED is needed. Those processes will need to be explored and proper referrals made following those processes established by APD. The financial data will be forwarded to ES per the interim plan for OPI ES work process currently in development. While financial application piece is being processed OPI CM will open an OPI Classic Benefit/plan in the interim to assure no payment delays to providers. If the consumer does not finish the OPIM application process that takes place within the 45-day application process then the consumer will remain on OPI Classic. The 287 forms will then be completed if they remain on OPI Pilot.

3. Everyone

Anyone requesting OPIM can go through ADRC and ADRC will determine the referral path. Some cases will go directly to an OPI CM. Some will go through the full XIX process and end up potential OPI/OPIM participants. When consumers are denied for XIX they will automatically be screened OPIM to determine if they meet financial requirements and are SPL 1-18. If they are the consumer will be contacted by the OPI CM for Service Planning and OPI/ OPIM intake. All SPPC and XIX renewals will be

initially screened for potential OPIM eligibility and will be offered the option if SPL 1-18 at the time of assessment renewal. If eligible and interested they will be contacted by an OPI CM for intake.

4. Benchmarks and Goals of phase 3:

The main goals for phase 3 are to assure full public access to the program, determine the proper number of OPI CM/OPI ES positions to maintain and/or recruit for, and confirm the impact to the OPI Classic budget.