<u>District 16 OPI-M Implementation Plan</u>

General Process:

- The APD Screening line 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 DAVS 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). OPI-M “point people” will be assigned at each branch, but all APD case managers will be trained on OPI-M.
- ECMs will submit OPI-M referrals to APD Central Office to 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 DAVS 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 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.
- OPI-M Administrators at APD will be kept apprised of District 16’s progress in executing Phases 1-4 of the implementation and informed at least 30 days in advance if deadlines cannot be met.

Phase 1:

Phase 1 will begin on or before June 3, 2024, and will include approximately 30 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.
- Fifteen current OPI clients that have been approved for 40 hours of in-home services/month.
- Five high needs clients from DAVS' 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 workload capacity at APD. If APD is unable to meet the deadline, by November, APD will extend current cases out in order to process the initial group of consumers.

If consumers are not eligible for OPI-M, the ECM will notify the SCM, and they will be referred back to DAVS/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 or Teams channel, 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. APD will discuss the differences of each program so the consumer is well informed and can make decisions that best meet their needs.
- Identify how new consumers contacting the APD office are screened and offered OPI-M.
    - Lobby 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 consumers 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 DAVS/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 DAVS 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.

This plan is approved by Rebecca Miller, the AAA Director and Christina Pattugalan, the APD District Manager.

Questions/Ongoing work:

- Is there any 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 DAVS 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 annual reassessments and the case managers assigned to that client?