

Step 1: Service case manager (SCM) assesses consumer's need or request for OPI-M Ancillary Services.

- The PLAN document must clearly describe why the OPI-M Ancillary Service is necessary to:
 - Meet an assessed ADL or IADL need;
 - Ensure the health and safety of the consumer;
 - Increase the individual's independence; or
 - Replace the need for human assistance.
- Note: If more space is needed in the PLAN, an additional page may be attached.

Step 2: SCM reviews [approved provider list](#).

- Enrolled providers are required for:
 - Chore Services; and
 - Home/Environmental Modification.
- Providers of the following services are not required to be enrolled:
 - Assistive Technology;
 - Special Medical Equipment (Durable Medical Equipment (DME)); and
 - Medical Supplies.

Step 3: SCM or consumer requests bids for the proposed service or item.

- Bids are required for:
 - Assistive Technology;
 - Special Medical Equipment (DME);
 - Chore Services; and
 - Home/Environmental modifications.
- Bids are not required for:
 - Medical Supplies: Items that help a consumer care for themselves and are disposed of once used. (Example: Incontinence supplies, gloves, wipes, wound care, etc.)
- If feasible, three bids are required. A bid does not include comparative pricing through the Internet. Consumers and SCMs may solicit bids from providers who are

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not on the enrolled provider list. If the provider is not enrolled, they must be enrolled prior to starting work. If three bids are not feasible, an explanation must be submitted when the request is sent to Central Office (CO).

- Note: All OPI-M Ancillary requests must be prior approved by CO. Providers must not order any supplies or start work until approved by CO.

Step 4: SCM obtains consent forms located on the [Case Management Tools website](#) and coordinates with consumer/landlord/contractor to obtain signatures as applicable.

- Chore Services Consent form
- Consumer/Landlord Environmental Modification Consent form
- Contractor Environmental Modification Consent form
- Note: All applicable forms are required prior to approval of the service.

Step 5: SCM submits the following via email to KPlan.Requests@odhsoha.oregon.gov:

- The [Request for K Plan Ancillary Services Form \(SDS 3406\)](#)
- with the 'Yes' box selected indicating OPI-M services;
- The most recent [PLAN](#);
- [Consent forms](#);
- Bids received; and
- Pictures are required for chore services and strongly encouraged for home/environmental modifications.
- Note: If the request is for medical supplies, indicate the anticipated length of time the medical supplies will be needed. Medical supplies may be approved by CO for ongoing needs of up to 12 months without requiring a new request.

Step 6: Receive approval via email from KPlan.Requests@odhsoha.oregon.gov.

- If a request is denied, SCM must send a notice of denial via an SDS 540 (Not OPI-M Decision Notice). CO will provide rule language and denial rationale.
- Note: For medical supplies approved by CO for an ongoing need of up to 12 months, SCMs must obtain a monthly invoice, ensure the medical supplies are still necessary, and forward the monthly invoice to Kplan.Requests@odhsoha.oregon.gov for monthly payment to the provider.

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Step 7: SCM advises provider to begin work or deliver item and notifies consumer.

- SCM requests provider to obtain [Assistive Technology Acceptance of Delivery](#) for:
 - Assistive Technology; and
 - Special Medical Equipment (DME).
- SCM requests [Consumer Confirmation of Job Completed to Their Satisfaction](#) from consumer for:
 - Chore Services; and
 - Home/Environmental modifications

Step 8: When work is complete or item is delivered, SCM obtains and sends the following to KPlan.Requests@odhsoha.oregon.gov:

- Final invoice; and
- Assistive Technology Acceptance of Delivery or Consumer Confirmation of Job Completed to Their Satisfaction.

Step 9: CO pays provider.

More information on the OPI-M Ancillary process may be found in the K-State Plan and OPI-M Ancillary Services Guidance document and the K-Plan Ancillary Services page in the [Case Management Tools website](#).