

Date Issued: 5/1/2024

Transmittal #: OEP-IM-24-014

Subject/Topic: ODHS 0221Med form update and usage with ONE

Primary Audience: Eligibility Leadership
 Family Coach LTSS Case Management
 Support Other:

Effective Date: 5/7/2024

Transmittal Type: Information
Memorandum

Impacted Area(s): New/Updated Policy/Rule Policy Clarification
 Reference Materials System(s), specify
 Other: ODHS 0221Med form

Reference Material(s): Medical Expenses QRG

Summary: The [ODHS 0221Med](#) form has been revised and there is a new process to use it with ONE.

Details: Prior to the ONE system launching, the [ODHS 0221Med](#) form was used by workers to calculate the monthly amount of allowable medical expenses for SNAP to enter in the SNAP legacy system. Some workers also used this form to calculate the monthly amount to enter in the legacy system for APD Medical programs. The ODHS 0221Med form has been revised so workers can use it to enter medical expenses information into the ONE system.

Training on how to use the revised ODHS 0221Med form

Along with revising the Excel workbook, a process has been developed for using the form. A TT4T will be presented on 5/7/2024 and 5/8/2024 which will demonstrate how to use this form. The recording will be posted to the [TT4T Library](#). The [Medical Expenses](#)

[QRG](#) was also revised. The ODHS 0221Med workbook includes a tab with instructions.

Follow these steps to ensure the ODHS 0221Med form works correctly

When opening a file containing macros from the form server the macros are disabled.

To be able to use all the features of this workbook follow these instructions for opening the file.

1. Locate the file as you do with all files on the form server.
2. Click on the de0221Med link under More Information.



3. In the pop-up window do not click on Open, click on Save As
4. Save the file to a local folder.
5. Navigate to the local folder and open the Excel file.
6. In the macro warning message near the top, click on Enable macros.
7. Say this is a trusted file.

When to use the updated ODHS 0221Med workbook

This revised form is to be used to combine multiple medical expenses into one record to be entered in ONE. It is to be used only for medical expenses which are:

- Recurring expenses
- Expenses paid via a payment plan
- For SNAP - one-time expenses averaged over time
- For APD Medical - one-time expenses paid by a credit card and the credit card payments are averaged over time

One-time expenses counting in one month's budget are to be entered into ONE separately as they are now.

Benefits of using the form

Using this revised form will reduce data entry in ONE. This form is not required if each medical expense is entered as a separate record in ONE. This form is required if two or more medical expenses are combined into one record in ONE. Here are some examples.

- An individual has one prescription only.
 - This form would not be used
 - The one prescription record will be entered into ONE.
- An individual has Medicare Part B and Part D premiums as well as copays for 10 prescriptions, and one recurring treatment visit and either all are verified, or all are not verified.
 - This form can be used and one record for the total entered into ONE.

Note: If some of the expenses are verified and some are not verified, the worker would enter two records – one record for the verified total and one record for the not verified total.

- If the worker chooses not to use the form, each of 13 expenses from the example above will be entered individually in ONE.

What to do with a completed form

Once the form is completed, the worker will upload a .pdf version of the entire workbook. Using the “Print all tabs” button on the “Forms Coversheet” in the workbook will create one .pdf document with all the tabs collated. Currently you cannot upload an Excel workbook into the electronic case file (ECF).

This form is not verification of expenses and is not something we expect clients to complete. This is a tool for workers, and it documents how the medical expenses were calculated and explains why data was entered as a combined expense record. The rules and processes regarding verification of the medical expenses have not changed.

Future updates

More changes are planned to further reduce data entry and you will be notified when these changes occur. One of the first changes will be allowing the Excel version to be uploaded. With that change the worker will also upload the workbook for future use during a Report a Change or a Renewal. Until that ability is added to ONE, please save the ODHS 0221Med form in Excel to a shared local folder. When informed we have the ability to upload Excel workbooks to the ECF, offices can upload those they saved. The .pdf version will be used for reviews and documentation purposes. For Renewals and Report a Change, workers will open the Excel version, save with a new name to their local folder, make any needed changes, and upload the new .pdf and new workbook to the ECF.

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Questions?

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