

Oregon Project Independence –  
Medicaid (OPI-M)

# Section 1115 Quarterly Monitoring Report



# Contents

- Introduction .....3**
- Demonstration Quarter Focus .....3**
- Key Accomplishments of the Quarter .....3**
  - Operational needs.....3
  - Staff readiness and training .....3
  - Preparation of demonstration deliverables .....4
- Post-Award Public Forums .....4**
- Upcoming Activities .....4**
- Quarterly Expenditures .....4**
- Overall Demonstration Development/Issues .....4**
  - Operational/policy issues .....5
  - Financial/budget neutrality development/issues .....5
  - Consumer issues .....5
  - Quality assurance/monitoring activity .....5
  - Demonstration evaluation .....5
- Additional Resources, Enclosures, and Attachments .....5**
  - Budget neutrality .....6
  - Demonstration website.....6

# OPI-M Quarterly Monitoring Report

## Introduction

On February 13, 2024, the Centers for Medicare and Medicaid Services (CMS) approved Oregon's request for a Section 1115 Medicaid demonstration, entitled "Oregon Project Independence-Medicaid (OPI-M)". The demonstration is to provide services to individuals ages 18 and older who are older adults or adults with physical disabilities with assessed needs in Activities of Daily Living. The demonstration also provides supports to unpaid caregivers to help meet beneficiaries' assessed needs while sustaining the caregivers' ability to meet those needs.

## Demonstration Quarter Focus

This quarterly report is an overview of the activities from August 1, 2024, through October 31, 2024, the third quarter of the first year of the demonstration. It includes information about implementation, operational activities, and demonstration deliverables. The demonstration website is maintained as required in the Standard Terms and Conditions (STCs) and can be found under Additional Resources, Enclosures, and Attachments.

## Key Accomplishments of the Quarter

Aging and People with Disabilities (APD) spent the third quarter of the first demonstration year continuing to focus on staff training and readiness, OPI-M implementation, Information Technology (IT) system resolution, and drafting permanent OPI-M rules.

### Operational needs

During the third quarter, APD continued to work on its implementation plans for OPI-M. Throughout implementation, APD elicited feedback from community partners and staff regarding OPI-M operational needs and focused on permanent rulemaking. This included a biweekly OPI-M workgroup with impacted staff, an OPI-M post-award public forum, resolving IT system issues, and twice weekly (Tuesday and Thursday) Question and Answer meetings for staff. APD also worked on developing policy and training material needed for OPI-M Ancillary services, which include assistive technology, chore services, home modifications, and special medical equipment and supplies.

### Staff readiness and training

An additional live training was held during the quarter to help prepare staff for OPI-M. The previously developed trainings were and continue to be available to all staff who engage with individuals interested in OPI-M or who are currently receiving services through APD or an Area Agency on Aging (AAA). This includes, but is not limited to, case managers, eligibility workers, Aging and Disability Resource Connection (ADRC) staff, and support staff.

- Live Training: Financial Eligibility

## Preparation of demonstration deliverables

In preparation for demonstration deliverables due throughout the quarter, APD worked with the Oregon Department of Human Services (ODHS) Office of Program Integrity, Quality Assurance (QA) Waiver Team on the HCBS Quality Improvement Strategy. APD also coordinated with the QA Waiver Team and Adult Protective Services on the HCBS Performance Measures. For the Quarterly Monitoring Report, the OPI-M Team worked together to prepare the report, receiving feedback from Oregon Health Authority (OHA). For the Quarterly Budget Neutrality Report, APD collaborated with the Office of Financial Services.

## Post-Award Public Forums

An OPI-M Post-Award Public Forum was held on August 5, 2024. APD presented on the history and development of OPI-M and provided basic information on eligibility and services offered. In addition, project and implementation planning was shared. Public comments were made tied to program eligibility, application processing, expressing interest prior to the public launch, and outreach.

## Upcoming Activities

The following are upcoming activities.

- November 2024: Finalization of Permanent OPI-M rules
- November 2024: Submit Revised HCBS Quality Improvement Strategy and Performance Measures
- December 2024: Submit Revised Evaluation Design
- December 2024: Submit Quarterly Monitoring Report
- December 2024: Submit Quarterly Budget Neutrality Report (deadline extended from October 2024)

## Quarterly Expenditures

APD continued to collect actual expenditure information for the third quarter of the first demonstration year. APD requested and received an extension to submit the second quarter reporting for the Budget Neutrality Monitoring Tool from October 11, 2024, to December 6, 2024, due to expenditure information on the CMS-64 Report for the Demonstration not being available until late November 2024. APD planned to submit the second quarter report for the Budget Neutrality Monitoring Tool on December 6, 2024.

## Overall Demonstration Development/Issues

The following is third quarter demonstration development and issues.

## Operational/policy issues

APD was able to resolve the primary challenge with IT systems development, creating a manual workaround for the OPI-M team to create cases in the MMIS system, allowing payment for In-Home Care Agencies and resulting in full implementation of the “In-Home Support and Personal Care Service” option, one of the primary service options for this demonstration. Additionally, APD worked with the Asset Verification System (AVS) vendor to mitigate the previous identified issues with staff gaining necessary access to the AVS portal and fixed the results to properly show for staff.

## Financial/budget neutrality development/issues

For financial/budget neutrality development and issues, APD and OHA identified that the quarterly reporting on the CMS-64 (Federal Fiscal Year (FFY) quarters) is not the same duration as the demonstration quarters, which start a month after the FFY quarters. APD and OHA intend to staff with CMS. The next Budget Neutrality Monitoring Tool will be due on January 11, 2025.

## Consumer issues

APD addressed financial eligibility concerns identified in the previous quarter by holding an additional live financial eligibility class for staff, which included tips and talking points when completing the eligibility process with consumers. To address concerns regarding the requirement to list the state as a remaining beneficiary on annuities and trusts, APD discussed talking points with staff and began developing a letter to be mailed to impacted consumers explaining the requirement and confirming that the OPI-M program does not have estate recovery. The financial eligibility process continued to be the top reason consumers withdrew their application. APD monitored enrollment numbers, reasons for withdrawing, and any further mitigation strategies.

Consumers also continued to have concerns about lacking access to medical transportation through OPI-M. APD found a potential solution for staff is to request medical transportation funding through the Older Americans Act Title IIIB Supportive Services. This funding is not available in all areas. APD plans to propose an alternative solution to CMS in future monitoring calls and this will be addressed further in the next quarterly report.

## Quality assurance/monitoring activity

Not applicable for this reporting quarter.

## Demonstration evaluation

During the third quarter, APD finalized a contract with Oregon Health and Science University (OHSU) and began working on its evaluation design for OPI-M. The evaluation design for the OPI-M program includes evaluation questions and corresponding hypotheses that focus on understanding how OPI-M was implemented and how OPI-M has affected outcomes for the populations involved.

## Additional Resources, Enclosures, and Attachments

The following provide information on additional resources applicable to the third quarter of the first demonstration year.

## Budget Neutrality

The Quarterly Budget Neutrality Report for DY1 Q2 will be uploaded into the PMDA system on December 6, 2024. The Quarterly Budget Neutrality Report for DY1 Q3 is due to be uploaded into the PMDA system by January 11, 2025.

## Demonstration website

The demonstration website can be found at <https://www.oregon.gov/odhs/providers-partners/seniors-disabilities/Pages/1115-demonstration-waiver.aspx>.

You can get this document in other languages, large print, braille, or a format you prefer free of charge. Contact the Office of Aging and People with Disabilities by email at [APD.Communications@odhsosha.oregon.gov](mailto:APD.Communications@odhsosha.oregon.gov). We accept all relay calls, or you can dial 711.