



Overview of ERC Services for Case Managers (CMs)

The Employer Resource Connection (ERC) is a program offered through the Oregon Home Care Commission (OHCC) to support Medicaid in-home consumers. Contracted, regional ERC organizations offer training, support, and resources to help consumer-employers (or their consumer-employer representative [C.E. Reps]), develop successful working relationships with their homecare workers (HCWs). ERC consultants support in-home consumers by providing guidance, tips, and coaching to manage their employer responsibilities outlined in the In-Home Services Rule ([OAR 411-030-0040\(4\)\(a\)](#)). Consultants provide direct support to consumers through in-home visits, video conferencing, phone calls, and email.

ERC Consultants Coach Consumers on to Successfully Manage their HCWs

Consultants conduct in-person referrals with consumers to help them:

- Create a help-wanted ad and job profile on [Carina](#) (care worker registry)
- Create interview and reference questions and conduct mock interviews to build interview skills.
- Assist with reference checks and provide guidance about how to hire qualified workers.
- Establish policies and rules of conduct for their HCW.
- Recognize, discuss, and provide tips to correct any performance deficiencies with their HCW.
- Train, supervise, and communicate effectively with their HCWs regarding their preferences and person-centered care.
- Understand the authorized activities on the HCW's task list.
- Create and maintain professional boundaries with HCWs.
- Address any work performance issues.
- Communicate concerns about their services with their CM.
- Create a back-up plan if a worker is unable to make a shift.
- Avoid fraud and abuse.
- End an employment relationship when the worker is not a good fit for them.

ERC Consultants Assist In-Home Consumers to Manage their Service Plan

ERC consultants help consumers manage their services and HCWs and are available to support and assist consumers and report concerns to CMs related to their work with consumers or their CE Reps who:

- Are not performing their employer duties in a professional manner or are not maintaining proper boundaries with a HCW.
- Are asking a HCW to perform activities not on the task list.
- Are failing to meet their service plan and employer responsibilities ([OAR 411-030-0040\(4\)\(a\)](#)) and may need to appoint a CE Rep.
- Have family members or others who seek to control a consumer-employer's service plan-related decision-making.
- Understand their responsibility to maintain a safe workplace.
- Have dangerous conditions in the service setting that jeopardize the health or safety of the service provider.
- Are alleged to have verbally or emotionally harassed a HCW or there are allegations of physical or sexual abuse.

ERC Consultants Support the Efforts and Work of Case Managers

ERC referrals serve to provide an extra set of eyes on the consumer and support a CM's efforts to help the consumer manage their service plan and HCWs.

- When a CM determines that a consumer is failing to manage their services or failing to maintain a safe and harassment-free workplace, the CM should make an ERC referral to support the CM's efforts to address known concerns with the consumer.
- ERC consultants, through their organization's contract with APD, are authorized to receive information about a consumer's in-home services and the concerns about the management of their services and HCWs.
- CMs should use the *ERC Referral Form (APD)* before a consultant visits the consumer, to ensure the consultant understands what issues and concerns need to be addressed with the consumer.
- When submitting a referral, the CM should provide a copy of the 598 Form (Task List) so that the consultant is aware of any concerns and the type of support the consumer needs.
- When a CM is pursuing mitigation and due process with a consumer who is failing to manage his/her services, or maintain a safe and harassment-free workplace, an ERC referral can be made to support the CM's efforts to address known health and safety concerns.
- CMs should document any pertinent information from an ERC referral in Oregon ACCESS.

ERC Consultant Referrals with New Intake Consumers

- The OHCC ERC Coordinator receives a "*Newly Eligible List*" which is forwarded to an ERC consultant. Consultants can serve new consumers to help them hire HCWs and understand their employer responsibilities.

- Local offices with a separate intake and ongoing CM structure, should have their intake CMs submit ERC referrals and document those referrals in narration. The ongoing CM assigned the case should contact an ERC consultant and provide relevant details related to the consumer's services, to help the consultant prepare for their meeting with the consumer.
- A consultant contacts the consumer or their CM within five days to schedule a referral with the consumer or their CE Rep.
- Consultants are available, if needed and desired, to provide ongoing support and assistance to consumers after an initial referral is completed.
- After a completed referral, the consultants will send a [Consumer Checklist](#) to the CM that includes a summary of the services provided, updates on the issues or concerns discussed, and any follow-up support needed.

ERC Referrals, Documentation and Follow-up Procedures

CMs should send ERC referrals to the contractor that serves their county or counties or to OHCC.ERC@odhsoha.oregon.gov. Referrals are forwarded to the appropriate consultant who will contact the consumer's CM for more information. A current list of ERC organizations and consultants can be found on the [ERC website](#). Referrals must be submitted to ERC contractors or consultants using a secure email connection.

- Once an ERC referral is completed, the CM should document the outcome and any follow-up actions needed. ERC consultants who have appropriate rights to Oregon ACCESS may also document the result in case narration.
- If the consumer refuses to participate in an ERC referral, the CM should document their response and follow mitigation strategies, if needed.
- If there are concerns that a requested ERC referral was not completed by an ERC contractor, contact OHCC.ERC@odhsoha.oregon.gov. Include the date the referral was requested. The ERC Coordinator will follow-up.
- If the consumer participates in an ERC referral and serious concerns continue, LO staff should work with their leadership, and if needed, consult with Central Office, to determine what further actions may be needed.
- A list of consultants may be found at the [Employer Resource Connection Older Adults and People with Physical Disabilities Contacts](#) web page.
- ERC contractors are available to participate in local office unit meetings. Reach out to them directly or through OHCC.ERC@odhsoha.oregon.gov.
- Since contractors may change over time, it is recommended CMs bookmark the [OHCC ERC website](#) to access the current list of contractors.

Questions about the ERC can be sent to: OHCC.ERC@odhsoha.oregon.gov or at (877) 867-0077.