

Mike McCormick

**Authorized Signature**

**Number:** APD-PT-14-031

**Issue Date:** 9/16/2014

**Topic:** Long Term Care

**Transmitting (check the box that best applies):**

- New policy   
  Policy change   
  Policy clarification   
  Executive letter  
 Administrative Rule   
  Manual update   
  Other: \_\_\_\_\_

**Applies to (check all that apply):**

- |  |   |
|--|---|
| <input type="checkbox"/> All DHS employees                             | <input type="checkbox"/> County Mental Health Directors                       |
| <input checked="" type="checkbox"/> Area Agencies on Aging             | <input type="checkbox"/> Health Services                                      |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Children, Adults and Families                 | <input type="checkbox"/> Other ( <i>please specify</i> ):                     |
| <input type="checkbox"/> County DD Program Managers                    |   |

Policy/rule title:	Provision of direct and indirect case management services		
Policy/rule number(s):	411-028-0010 Definitions; 411-028-0020 Scope of Services; 411-028-0040 Qualified Case Manager	Release no:	
Effective date:	Immediately	Expiration:	
References:	OAR chapter 411, Division 028 Case Management Services		
Web Address:	<a href="http://www.dhs.state.or.us/policy/spd/rules/temp/411_028_temp.pdf">http://www.dhs.state.or.us/policy/spd/rules/temp/411_028_temp.pdf</a>		

**Discussion/interpretation:** Previously, Adult Protective Service (APS) staff was instructed to narrate direct and indirect consumer contacts in Oregon ACCESS (OACCESS). Recent CMS clarification means that APS staff cannot provide direct or indirect case management services and should not narrate doing so in OACCESS because APS positions are not funded under the Title XIX waiver.

In order for APS staff contact with K Plan service consumers to qualify as an indirect case management service, the APS staff must discuss the contact with the consumer's Case Manager, that Case Manager's Supervisor, Manager or with Diversion staff. The Case Manager will then record this contact on OACCESS.

APS staff contact with K Plan consumers by itself cannot qualify as direct case management service.

An APS referral made by the consumer's Case Manager, Case Manager's Supervisor, Manager or Diversion staff will count as an indirect case management service.

**Implementation/transition instructions:** Case Managers, Supervisors, APS Staff and Managers should read, understand, and apply the policy.

**Training/communication plan:**

**Local/branch action required:** Review and implement this policy.

**Central office action required:** Provide technical assistance and training as needed.

**Field/stakeholder review:**  Yes  No

**If yes, reviewed by:** APD Operations Committee; APD Policy Committee

**Filing Instructions:**

*If you have any questions about this policy, contact:*

<b>Contact(s):</b>	Chris Ellis		
<b>Phone:</b>	541-440-3427 ext 227	<b>Fax:</b>	541-673-0375
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