

Case Manager Talking Points: Recipient Losing Housing

The Case Manager Talking Points: Losing Housing document is intended to be a tool to assist APD Case Managers during the Public Health Emergency Unwinding period. This document does not contain comprehensive eligibility or case management information. It is intended for use by APD Case Managers who have basic familiarity with the eligibility and case management processes. Information should not be pulled from this document and provided directly, as written, to Consumers, Community Partners, Assistors or other entities.

Important: Oregon Department of Human Services and Oregon Health Authority cannot provide financial planning services or legal advice.

If you are no longer eligible for Medicaid funded housing, you may consider the following:

- If you have the financial means to pay privately for your residential care, you may do so. This may particularly be necessary in situations in which you are over the resource limits for the Medical programs. Paying privately for a short period may allow you to reduce the amount of resources you have and regain Medicaid eligibility.
- Even within a medical program, other considerations may impact the income requirements.
 - OSIPM income limit is the SSI Standard (\$941.00 for 2023)
 - OSIPM + Waivered Services (APD, ICP, NFC, PAC) is 300% of the SSI Standard (\$2300.00 for 2023)
 - OSIPM + Waivered Services (APD, ICP, NFC, PAC) AND an Income Cap Trust can be over 300% of the SSI standard
 - An Income Cap Trust can be established for your benefit. The trust holds your income. Certain qualifying payments can be made to you from the trust. At the time of your death, the funds in the trust may be used to reimburse the state for medical assistance you received.
- If you think you may need to establish an Income Cap Trust, you will need to consult an Eligibility worker. Specific rules apply to how these trusts are established, what payments can be made to you from the trust during your life, and how funds may be distributed after your death.

If you believe that you should remain eligible for Medicaid programs, it is important that you speak to an Eligibility Worker first. You may also need to seek financial planning or legal advice outside of ODHS/OHA.

Case managers: if a recipient needs to speak with an Eligibility Worker, follow your local office process to assist the recipient with scheduling an eligibility appointment.