

Case Manager Talking Points: Recipient Over Income

The Case Manager Talking Points: Recipient Over Income 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.

What can CM communicate so recipients can be prepared for the Public Health Emergency unwinding starting 4/1/2023:

- Keep contact information up to date in ONE.
 - We want to make sure you get your letters, so you know what steps to take to keep your coverage. This means you need to make sure we have your current address, phone number, email, or other contact information. You may update your information in the following ways:
 - You may update your contact information in the ONE Applicant portal
 - You may contact the ONE Customer Service Center at 1-800-699-9075 or 711 (TTY)
- When it is time for you to renew your medical coverage:
 - Pay close attention to your mail and open letters you receive from the state.
 - In some cases, you may receive a “case summary” that outlines information that was used by the system to make its eligibility determination. Review this summary and notify the state if information is incorrect and needs to be updated.
 - In some cases, you may need to complete an interview for your renewal. You will get a notice asking you to contact us for an interview. Be sure to schedule your interview and provide us with the most up-to-date information during this interview. The letter you receive will have instructions about how to respond.
 - In some cases, we may ask you to give us more information or proof about what you tell us. If we ask for information, be sure to respond as soon as possible or let us know if you need more time. The letter you receive will have instructions about how to respond.

Recipient is over income:

If you are over the income limit for Medicaid programs, you may consider the following:

- Some income that you have may be excluded. It is important that you talk to us about all your income, where it comes from, if it is available to you, etc....
- There are several medical programs. Each medical program has its own income requirements. It is important that you tell us your circumstances so that we place you in the right medical program. For example, we need to know if you are married, if you have children you are supporting, if you are pregnant, etc...
- Even within a medical program, other considerations may impact the income requirements. An eligibility worker can provide information specific to your income and circumstances.
- In some cases, you may be able to establish an Income Cap Trust if your income is more than the medical program limits. An Income Cap Trust allows you to put your income into a trust that is established for your benefit. The money in the trust is used to pay for your care as well as other specific costs that are allowed to come out of the trust. If there's any money left in the trust when you pass away, that amount is paid to the state.
 - If you need an income cap trust, you will receive a letter in the mail. The letter you receive will have information about who to call.

If you think you are over the income limits for the Medicaid programs, talk to an eligibility worker before you do anything. The eligibility worker will go over all your income with you and tell you about your options. You may also need to get financial planning or legal advice outside of ODHS/OHA. The Aging and Disability Resource Connection (ADRC) can help you find financial and legal resources in your area. You can call 1-855-673-2372 or use their [website](#) to search for local resources.

Case managers: if a recipient needs to speak with an Eligibility Worker and one is not readily available, direct them to the ONE Customer Service Center at 1-800-699-9075 or 711 (TTY).