

## **Case Manager Talking Points: Recipient Over Resources**

**The Case Manager Talking Points: Recipient Over Resources 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 resources:**

If you have countable resources over the limit for Medicaid programs, you may consider the following:

- Some resources that you have may be excluded. It is important that you talk to us about all your resources, how they are used, if they are available to you, etc....
- The Medicaid rules are very specific about giving away or selling resources. When resources are given away or sold to become (or stay) eligible for benefits, this could result in disqualification from some programs for a period of time.
- The Medicaid rules allow for some specific actions that can be taken to reduce resources. Some examples include:
  - Pre-paying Estate Recovery claims. Estate Recovery is a process in which Oregon may recover some costs for services provided to the consumer from the consumer's estate after death. Please note that there are limitations in what Oregon can recover. For example, Oregon will not initiate recovery if there is a surviving spouse. More information on Estate Recovery is available in the EAU brochure ([MSC 9093](#)). This brochure is available in additional languages on the [ODHS/OHA Publications and Forms](#) website. You can also contact the Estate Recovery Unit directly (see [MSC 9093](#) for contact information.)
    - You can also make a Voluntary Repayment for Past Assistance at any time to keep resources under the limit. Contact the Estate Administration unit to ask about a Voluntary Repayment for Past Assistance.
  - Purchasing an irrevocable funeral plan
  - Setting aside up to \$1500 case in a separate fund for burial
  - Paying down debts or making purchases for yourself
  - Paying privately for Long Term Services and Supports

**If you believe you have countable resources over the limits for the 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. 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).