

AGING STRATEGIC ALIGNMENT PROJECT

State Profile for

OREGON

Home- and Community-based Services for Older Adults and Adults with Physical Disabilities

Background

- Oregon's 60+ population was 715,847 in 2008 (18.9% of the state's total population), with 8.7% below the federal poverty level.¹
- The 60+ population is projected to be 1,054,164 in 2025 (23.2% of the state's total population).²
- About 23.2% of all households in 2007 had one or more persons age 65 years and older, and 42.2% of persons age 65 years and older had a disability.³
- Of the 598,110 Medicaid beneficiaries in the state in 2003, 7.1% were aged, 11.8% were blind and disabled, 13.5% were Dual Eligible, and 6.8% were HCBS Waiver beneficiaries.⁴
- Medicaid expenditures for institutional long-term care were 27.3% of total long-term-care expenditures, compared to 72.7% for HCBS in fiscal year 2007.⁵

Abbreviations

AAA	Area Agency on Aging
ADL	Activities of Daily Living
AoA	Administration on Aging
CMS	Centers for Medicare and Medicaid Services
HCBS	Home- and Community-based Services
IADL	Instrumental Activities of Daily Living
MRDD	Mental Retardation and Developmental Disabilities
OAA	Older Americans Act
PACE	Program of All-inclusive Care for the Elderly
SUA	State Unit on Aging

¹ Department of Health and Human Services, Administration on Aging. (2009). *AGing Integrated Database (AGID): American Community Survey (ACS) demographic data 2004-2007 and state-level population estimates data 2000-2008* [Data files]. Available from <http://198.136.163.234/default.asp>

² Department of Health and Human Services, Administration on Aging. (2009). *AGing statistics: Projected future growth of the Older population; By state: 2005-2030; Aged 60 and above* [Data files]. Available from http://www.aoa.gov/AoARoot/Aging_Statistics/future_growth/future_growth.aspx.

³ Reimbursement and Research Department, American Health Care Association. (2006, August 29). *The state long-term health care sector 2005: Characteristics, utilization, and government funding*. Washington, DC: Author.

⁴ U.S. Census Bureau, 2007 American Community Survey, United States and States. *Percent of households with one or more people 65 years and over* (R1104) and *Percent of people 65 years and over with a disability* (R1803).

⁵ Burwell, B., Sredl, K., & Eiken, S. (2008, September 26). *Medicaid long term care expenditures FY 2007*. Eagan, MN: Thomson Reuters.

Government Structure to Manage HCBS Assessment Process

- **SUA:** Seniors and People with Disabilities Division of the Department of Human Services.
www.oregon.gov/DHS/spwpd/index.shtml
- **State Medicaid Agency:** Seniors and People with Disabilities Division of the Department of Human Services.
- Oregon does not have separate SUA and Medicaid agencies. There are two Medicaid directors; one director for long-term care and another for acute care.
www.oregon.gov/DHS/healthplan/index.shtml
- Oregon has a consolidated agency for long-term-care programs. It is: Seniors and People with Disabilities Division of the Department of Human Services. All Medicaid programs, certification for nursing homes, quality of care, community programs, OAA programs, and MRDD programs are under this division.
- The director of Oregon's SUA reports to the director of the Seniors and People with Disabilities Division of the Oregon Department of Human Services, who reports to the Governor.
- Oregon has 17 AAAs operating in the state.

Single Point of Entry (SPE)/Aging and Disability Resource Center (ADRC)

- Oregon does not have an ADRC, but has received grants to start two.
- All ADRC sites will have a physical (bricks and mortar) infrastructure; none of the ADRC sites will operate under a virtual model.
- In addition to serving older adults, Oregon's ADRC plans to serve those with physical disabilities, cognitive impairment, Alzheimer's disease or a related condition.
- Oregon's ADRC would like to target the at-risk population.

Medicaid

- For Medicaid applicants, in determining functional eligibility for nursing home pre-admission, Oregon requires an in-person assessment by someone other than nursing home staff. The Pre-Admission Screening (PAS) and the Preadmission Screening and Resident Review (PASRR) are conducted by the Seniors and People with Disabilities Division.
- All applicants (Medicaid or non-Medicaid) go through the same process as described above.

Non-Medicaid

- For non-Medicaid applicants in Oregon, nursing home pre-admission assessment is performed by someone other than nursing home staff. The assessment is done in person and by case/paper review for older adults, adults with physical disabilities and adults at risk by the Seniors and People with Disabilities Division.
- All applicants (Medicaid or non-Medicaid) go through the same process as described above.

State Medicaid Plan

- Oregon provides HCBS through the state Medicaid plan.
- Refer to Table 1 for specific services provided.
- **PACE:** Oregon has one PACE contractor serving approximately 750 individuals.

Medicaid Waivers

- Oregon has two waivers that provide HCBS to older adults and/or adults with physical disabilities. These are: Aged and Disabled Waiver and Independent Choices (1915j).
- **Aged and Disabled Waiver:** This program serves those aged 18 and older with physical disabilities and older adults; it provides a comprehensive array of HCBS to approximately 28,000 people. In-home

services are generally not provided through agencies; the individual hires someone to provide the service and the state reimburses the cost of care. For an individual to financially qualify for this program, the income level must not exceed 300% of SSI and assets can be no more than \$2,000. A portion of this program is completely consumer directed; the participant chooses the services to receive and does the hiring of the individual.

- **Independent Choices (1915j):** This program is for participants age 18 and older with physical disabilities and for older adults. Participants in this program manage their own services with a budget based on their ADLs and the amount of family and community support they receive. For applicants to financially qualify for this program, their income level must not exceed 300% of SSI and they can have no more than \$2,000 in assets.
- Refer to Table 2 for an overview of selected HCBS programs. Table 1 shows the types of services offered under each program.

CMS-funded Programs and Grants

- Oregon has one CMS-funded program and grant that provides HCBS to older adults and/or adults with physical disabilities. This is Money Follows the Person.
- **Money Follows the Person:** This program is for persons of any age who are residing in a nursing home (or hospital) and wish to return to the community. The program's goal is to move very high acuity individuals out of institutional settings. For applicants to financially qualify for this program, their income level must not exceed 300% of SSI and they can have no more than \$2,000 in assets. There is a broad array of HCBS provided through this program, with additional nursing and behavioral supports for the higher acuity participants. The program is expected to move 1,000 participants out of nursing facilities.
- Refer to Table 2 for an overview of selected HCBS programs. Table 1 shows the types of services offered.

State-funded HCBS Programs

- Oregon has one state-funded program that provides HCBS to older adults and/or adults with physical disabilities. This is Oregon Project Independence.
- **Oregon Project Independence:** This program is for individuals age 60 and older or those with dementia and/or physical disabilities. The participants in the program manage a budget for services based on functional assessment of ADLs. Participants are expected to contribute to payment for services via a sliding fee scale unless their income is 200% of the federal poverty limit (FPL). Many participants in this program are just above the Medicaid limit or have spent down to the Medicaid limit. The program serves approximately 2,000 people.
- Refer to Table 2 for an overview of selected HCBS programs. Table 1 shows the types of services offered.

Locally Funded HCBS Programs

- Oregon uses local funds for HCBS for older adults and/or adults with physical disabilities.
- Local funds are used for all program eligibility assessments and case management responsibilities.

OAA-funded Programs and Grants

- Refer to Table 1 for services provided through Title III of the OAA.
- Oregon uses cost-sharing mechanisms or sliding fee scales in the delivery of Title III services (this may vary from AAA to AAA).
- Oregon has two other OAA-funded programs and grants that provide HCBS to older adults and/or adults with physical disabilities. These are: Health Promotion and Nursing Home Diversion.

Social Service Block Grants (SSBG) and Community Service Block Grants (CSBG) for HCBS

- Oregon does not use SSBG to provide HCBS for older adults and/or adults with physical disabilities.
- Oregon does not use CSBG to provide HCBS for older adults and/or adults with physical disabilities.

Consumer Direction

- Oregon offers consumer-directed options. The HCBS programs in the state that offer consumer direction are Aged and Disabled Waiver, Money Follows the Person, and Oregon Project Independence.
- Models of consumer direction available in the state include: a Cash and Counseling grant, an option modeled after Cash and Counseling, and cash options.
- Those permitted to provide services under consumer direction in Oregon are: spouses, adult children of the consumer, other family members, and friends.
- The waiver has been amended to allow spouses to be a provider; however, other types of legal guardians are not permitted to provide services under consumer direction.

Managed Care

- Oregon does not have HCBS programs run by managed care health plans.

Major Accomplishments and Initiatives

- Oregon's concern is maintaining the balance within the system while accommodating the increase in the older population in the years to come.
- Developing a statewide ADRC to provide counseling and direct assistance is a major priority for Oregon.
- Oregon plans to target the pre-spend down population in the near future. Oregon's overall goal (and mission) is to assist seniors before they need public assistance.

Table 1: Types of Home- and Community-based Services Provided Under Oregon’s Programs for Older Adults and Adults with Physical Disabilities

Types of Services	Program Type / Funding Source					
	Medicaid Waivers		CMS-funded Programs and Grants	State-funded Programs	State Medicaid Plan	OAA Title III
	Aged & Disabled Waiver	Independent Choices	Money Follows the Person	Oregon Project Independence		
Adult Day Care / Adult Day Health	X					
Assisted Living	X					
Caregiver Services / Respite / Education	X	X	X			
Case Management / Care Coordination	X	X	X	X	X	X
Chore / Homemaking	X	X	X	X		X
Companion Services / Socialization Activities						
Employment						
Equipment / Supplies / Modifications / Assistive Technology			X			
Health Promotion Activities			X			
Home Health / Personal Care	X	X	X	X	X	
Information / Assistance / Referral			X			X
Legal Assistance / Financial Advice						X
Medical / Dental / Medication Care						
Mental and Behavioral Health Services						
Nursing	X	X	X		X	
Nutrition / Meals	X	X	X	X		X
Personal Supports for Community Living / Transitioning	X	X	X			
Rehabilitation / Therapy						
Residential Services	X		X		X	
Transportation	X		X			X
Other/Unspecified HCBS	X	X	X	X	X	X

Table 2: Selected HCBS Programs for Older Adults and Adults with Physical Disabilities in Oregon

Program Type / Funding Source	Program Name	Ages Served	Nursing Home Level of Care Required	Entity Responsible for Functional Assessment	Entity Responsible for Financial Assessment	Entity Responsible for Case Management	Waiting List (Number)	Consumer Direction Option
Medicaid Waivers	Aged & Disabled Waiver	18+	Yes	State agency: Seniors and People with Disabilities Division; Area Agency on Aging	State agency: Seniors and People with Disabilities Division; Area Agency on Aging	State agency: Seniors and People with Disabilities Division; Area Agency on Aging	No	Yes
	Independent Choices - 1915j	18+	Yes	State agency: Seniors and People with Disabilities Division	State agency: Seniors and People with Disabilities Division	State agency: Seniors and People with Disabilities Division	No	Yes
CMS-funded Programs and Grants	Money Follows the Person	All ages	Yes	State agency: Seniors and People with Disabilities Division	State agency: Seniors and People with Disabilities Division	State agency: Seniors and People with Disabilities Division	No	Yes
State-funded Programs	Oregon Project Independence	60+ or younger with dementia	No	State agency: Seniors and People with Disabilities Division; Area Agency on Aging	State agency: Seniors and People with Disabilities Division; Area Agency on Aging	State agency: Seniors and People with Disabilities Division; Area Agency on Aging	Yes (500)	Yes