

## Aging, Disability and Veteran Services Adult Program Eligibility Guidelines (1-1-18)

Program	Basic Medicaid, OSIPM - OHP PLUS REFER TO ADVSD BRANCH	Home & Community Based Waiver and Nursing Facility OSIPM/MAGI REFER TO ADVSD BRANCH	State Plan Personal Care REFER TO ADVSD BRANCH	Medicare Savings Programs QMB/SMB/SMF REFER TO ADVS BRANCH OR OMSC
<b>Benefits</b>	Doctor, pharmacy, hospitalization, medical transportation, dental, preventive care, mental health services	In-home care, Adult Foster Home, Residential Care, Specialized Living, Assisted Living, Adult Day Health Care, Nursing Facility PLUS OHP Plus benefits.	Up to 20 hours per month of personal care services unless an exception for additional hours applies.	<b>QMB:</b> Medicare premiums, deductible, and co-insurance. <b>SMB/SMF:</b> Only Medicare Part B Premiums
<b>Primary Requirements:</b> for All Programs: US Citizen (medical programs require proof of citizenship) <u>or</u> Immigration Status must meet Federal Criteria for Federally Funded Programs; <b>Plus</b> Oregon Resident; <b>Plus</b> specific program requirements	<b>Aged:</b> (65+), <b>Blind Determination from SSA , Disability Determination, or SSI eligible.</b>  People with Medicare can also have Basic Medicaid if they qualify.	Receiving OHP Plus <b>and</b> Assessed by an ADVSD Case Manager as service priority levels 1-13.  Cannot have made a disqualifying property transfer within look-back period of 5 years.  Must agree to a claim on estate after death.	Receiving <u>OHP Plus</u> and require assistance in: <ul style="list-style-type: none"> <li>• Basic personal hygiene,</li> <li>• toileting,</li> <li>• mobility, or</li> <li>• nutrition; or</li> <li>• medication management,</li> <li>• oxygen use, or</li> <li>• delegated nursing tasks.</li> </ul>	Have part A of Medicare (Hospital Insurance Benefit).  If individual has Part B only, State may be able to purchase Part A for them  Note: These program benefits are also available to OSIPM clients
<b>Income Limits</b>	\$750.00 - Individual \$1125.00 - Couple  The dollar amounts above are based on 100% Supplemental Security Income (SSI) limits  \$20 of unearned income is not counted.	<b>OSIPM</b> \$2250.00 or less for an individual.  A couple with a spouse at home needs an income and resource assessment. Individuals in many instances can divert income to the spouse within allowed limits.  OSIPM individuals may be required to pay toward the cost of their services depending on their income and allowed deductions.  An individual with income above these limits may be eligible with the establishment of a qualifying trust.	<b>If OSIPM recipient:</b> \$750.00 - individual \$1125.00 - couple \$20 of unearned income is not counted.  <b>If OHP MAGI Adult:</b> (approximately 138% Federal Poverty Level) \$1367 Individual (approximate) \$1843 Couple (approximate)  For individuals in other qualifying Medicaid programs, see program's income limits.	<b>QMB:</b> \$1005 Individual, \$1354 Couple. (this is 100% FPL) Part A&B premium & deductible paid.  <b>SMB (SLMB):</b> \$1206 Individual, \$1624 Couple. (this is 120% FPL) Part B monthly premium coverage.  <b>SMF (QI):</b> \$1357 Individual, \$1827 Couple. (this is 135% FPL) Part B monthly premium coverage. This does not apply if receiving Home and Community Based Waivered services or nursing facility care. <b>\$20.00 of income is not counted</b> If there is earned income (employment) the calculation is different – refer to branch.
<b>Allowed Resources</b>	\$2000 - Individual \$3000 - Couple  plus home, car, \$1500 burial plan per person (in separate account.)	<b>OSIPM Individual</b> -Same as Basic Medicaid (OSIPM) <b>Couples</b> - if only one receiving care, the spouse can keep \$24,720 or ½ up to \$123,600 or a court ordered amount. <b>MAGI</b> - no resource limit	<b>OSIPM</b> - \$2000 Individual, \$3000 couple Plus home, car, approved burial  <b>MAGI</b> - No resource limit	No resource limit.  Must pursue regular payments from retirement plans if this is an option.

Program	MAGI/OHP Plus REFER TO <a href="http://OregonHealthCare.gov">OregonHealthCare.gov</a> OR 1-800-699-9075	Employed Persons with Disabilities (OSIPM-EPD) REFER TO ADVSD BRANCH	Supplemental Nutrition Assistance Program (SNAP) aka Food Stamps REFER TO ADVSD BRANCH	Oregon Project Independence (OPI) REFER TO DISTRICT CENTER
<b>Benefits</b>	This is the <u>Modified Adjusted Gross Income</u> Medicaid Expansion coverage (also known as “Obamacare”) OHP Plus Benefits (doctor, pharmacy, hospitalization, medical, dental, transportation, preventative care, mental health services)	May also receive In-home Care, Adult Foster Home, Residential Care, Specialized Living, Assisted Living, Adult Day Services, Nursing Facility if meet eligibility criteria (see Home & Community Based Waiver & NF category on Page 1 of this document).	Financial assistance for the purpose of purchasing food. Benefits are issued via an electronic benefits card. Benefits for seniors (65+) and adults receiving SSI are a cash benefit and can be issued via check, direct deposit or EBT card. Recipients may also be eligible for Oregon Telephone Assistance Program and other benefits and discounts.	Supplemental supportive services to help people live independently at home. OPI Program is handled in Multnomah County by District Center offices and Case Managers.
<b>Primary Requirements:</b> for All Programs: US Citizen (medical programs require proof of citizenship) <u>or</u> Immigration Status must meet Federal Criteria for Federally Funded Programs; <b>Plus</b> Oregon Resident; <b>Plus</b> specific program requirements →	<b>Cannot Be:</b> <ul style="list-style-type: none"> <li>Receiving SSI;</li> <li>Eligible for other Medicaid coverage in Oregon</li> <li>Over age 65;</li> <li>Eligible for Medicare (except pregnant or parent/caregiver individuals)</li> </ul> Eligibility is determined by Oregon Health Plan offices in Salem, not our Branch offices	<ul style="list-style-type: none"> <li>Age 18</li> <li>Have a disability as determined by SSA or State disability determination process.</li> <li>Be employed and paying FICA or SECA taxes or have convincing proof of self-employment.</li> <li>If on EPD but lost employment, still eligible if “spending down” to OSIPM in the first 12 months after employment ends.</li> <li>Must pay a participant fee ranging from zero to \$150 per month.</li> </ul>	<ul style="list-style-type: none"> <li>Individual/family must not be living in a situation where at least 50% of meals are provided (ALF, RCF, NF, hospital, etc.)</li> <li>Clients residing in licensed Adult Foster Homes or DD/MH group homes MAY be eligible in certain circumstances.</li> <li>Clients residing in Alcohol &amp; Drug treatment facilities cannot apply on their own, the facility must apply on their behalf.</li> <li>Some household members are required to apply together, such as spouses, and children under age 22 with parent.</li> <li>Most higher education students must be employed to be eligible</li> </ul>	<ul style="list-style-type: none"> <li>60 yrs or older, or age 19-59 if disabled</li> <li>Not receiving OHP Plus MAGI or OSIPM</li> <li>Must have a qualifying need for assistance in activities of daily living that meets State requirements (see OAR <a href="http://www.oregon.gov/OSD/411-015-0010">411-015-0010</a>). District Center case managers assess the client. Client must be Service Priority Levels 1-18 to be served.</li> <li>Clients reside in their own homes.</li> <li>Some clients pay a monthly co-pay for in-home services based on income, <b>OR</b> a \$25 one-time-only fee</li> </ul> Authorized services will be in accordance with the In-Home Service Rules
<b>Income Limits</b>	Income limits are approximate, based on the federal Modified Adjusted Gross Income [MAGI] and current FPL.  <b>MAGI Adult:</b> \$1387 individual (138% FPL) \$1868 two people (138% FPL)  (Pregnant Women and Children may have a different income standard)	Income that goes toward certain employment costs, along with other standard deductions, determines Adjusted Income. <u>Adjusted</u> income limit is \$2513  Any employed person with a disability with earned income lower than \$5111 per month automatically meets the adjusted earned income	Clients 65 years or older or determined to meet disability criteria are categorically eligible if their income is less than 185% of federal poverty level and they are given a State Resource Guide pamphlet, and these things are narrated.  Income less than: \$1860.00 individual \$2504.00 Couple	<b>OPI Fees for Service:</b> Clients with <u>net incomes</u> between 150 and 400% of Federal Poverty Level (FPL) are expected to pay a fee toward their service, based on a sliding fee schedule. Families with net incomes above 400% FPL pay the full hourly rate of the service provided.  For fee schedule consult with District Center.
<b>Allowed Resources</b>	No resource limit	\$5,000 in addition to approved accounts.	If categorically eligible (see Income Limits) \$25,000 lottery winning limit. <b>If not</b> categorically eligible, resources of \$3500 allowed if at least one member of house hold is elderly or disabled, or \$2250 for all other financial groups	<b>No resource limits.</b> OPI case managers assess client’s ability to pay toward services.

Effective 1-1-18. This tool provides a general overview of program limits and requirements, and should not be used to discourage anyone needing assistance from contacting an Aging Disability and Veteran Services (ADVSD) office. If you have any questions or wish to make a referral, call the ADVSD ADRC at **503-988-3646**.