Closing an OPI Case

1) End OPI CAPS Benefits and Services
   a) Approve or invalidate any pending CAPS or service plans
   b) Use actual date of death or other date if services were ended

2) Communicate (call or email) with care providers end of services
   a) 546 with end date to OPI voucher clerk
      i) End ONGO
   b) Mail closed SDS 4105 to HCW, notifying of closure
   c) Send 546 to In Home Care agency
   d) Notify all other OPI service providers with end dates of service

3) Narrate reason for closure, forms and notifications sent.

4) Close tabs in Oregon Access
   a) Benefits Section (if OACCESS is being used by Medicaid/Eligibility workers then do not update those tabs, just notify the workers)
      i) SVC Tab – indicate close and the date
      ii) Case Overview
          (1) If closing OPI - remove the Services name and uncheck OPI box
          (2) If ending due to death – leave Services name and OPI box checked
   b) Service Needs - OAA Svc/FCSP tab – close all OPI services (each line for OPI must be ended)
      i) date should **always** be last day of the month of closure.
   c) If no other workers on the case, inactivate case (with workers names on it) and screening. Note: do not use unassigned case box for this action. Case status (active or inactive) can only be completed from the person search function in OACCESS.

Denying, Reducing or Terminating Services
   A. Follow AAA policy on notifying the individual of the change or end of services.
   B. Notify the consumer in writing of the decision and provide grievance procedure following AAA procedure.
   C. Monitor for consumer questions
   D. Close case following the closure guidelines after specific time has passed.

Death closure note: Only add the date of death (DOD) to the person screen if you were the only worker on the case. When the case is shared with Medicaid for QMB and other Medicaid programs, do not add the DOD. It interferes with their integration and processes. If you add the DOD, do this last. Also, use "deceased" as the end reason on the OAA tab.

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