The OPI Income/Fee Determination Record Form is designed to do the mathematical calculations for you when it is completed electronically.

Tips for using the form electronically:

1. **Use Tab key** to move between fields (not enter key)

2. Enter household income with monthly amounts

3. **Totals**

4. Enter household medical deductions

5. Totals

6. Net income - use this calculation with the current OPI fee schedule for percentage of OPI fee.

7. OPI fee – enter using two decimal points and do not use the % sign.
   - For example, 23% would be entered as 23.00 or 7.3% would be entered as 7.30.
   - This figure will then populate the table in the OPI % column.

8. This form also produces the OPI Monthly Fee to be entered on the service benefit tab in OACCESS.

DHS
Oregon Department of Human Services
Aging and People with Disabilities

Oregon Project Independence (OPI) Income/Fee Determination Record

Name (Last, First, Middle)   Prime no.   Date   No. in household

Gross monthly income *(All income coming into the household including salaries, interest and dividends, pensions, annuities and Social Security)*:

	$		$
	$		$
	$		$

Total gross monthly income: $ 0.00

Allowable medical deductions *(Household out-of-pocket medical expenses including prescription drugs and health insurance)*:

	$		$
	$		$
	$		$

Total allowable medical deductions: $ 0.00

Net monthly income *(income left over after medical deductions)*: $ 0.00

OPI percentage to pay *(current OPI fee schedule)*:   0.00%

If adjusted income is zero, a **$5.00 annual fee** is charged — due at the time of eligibility and re-eligibility *(check one)*:   ☐ Yes   ☐ No

Type of service	Monthly hours	Hourly rate	Multiplied by	OPI %	Maximum amount to be charged monthly
		$	0	0.00%	$0.00
		$	0	0.00%	$0.00
		$	0	0.00%	$0.00
		$	0	0.00%	$0.00
Totals	0			0.00%	Maximum monthly fee $ 0.00

By signing below, I agree that to the best of my knowledge the information listed above is correct.

Individual signature   Date

Case manager signature   Date

OPI Fee Determination   Copy to individual; original to OPI file   SDS 0287K (07/2012)