Process for Collecting and Tracking OPI Income-Based $25.00 Enrollment Fee

Background:

Per OPI administrative rule, 411-032-0044, Fees for Authorized Service and Fees for Service Schedule,

*"A one-time fee is applied to **all** individuals receiving OPI authorized services who have adjusted income levels at or below federal poverty level. The fee is due at the time eligibility for OPI authorized services has been determined."*

The OPI income-based enrollment fee of $25.00 applies to OPI participants with adjusted income percentage of zero (0) as calculated using the *OPI Fee Determination form 0287K*. The fee applies to OPI participants intending to work with a HCW or in- home agency.

The fee does not apply to OPI consumers with adjusted income above the federal poverty level; these individuals have a monthly pay-in based on a sliding fee schedule.

Please note that if a client has already paid the $25.00 fee, but at a subsequent reassessment shows an increase in income sufficient to require a monthly pay-in, the client is obligated to begin making that monthly pay-in. This increase in income could be due to marriage, or new source of income, such as a maturing annuity.

If, over time, a consumer's adjusted income fluctuates from the level requiring the $25.00 fee to a monthly fee, then back to the zero percent level, no second payment of a $25.00 fee will be required.

Process for collecting and tracking payment of the $25.00 fee

1. OPI case manager uses the OPI Fee Determination form 0287K and determines that a participant has no monthly pay-in. Case manager provides participant with an invoice for the $25.00 fee. The invoice can be found on the ADVSD Provider & Program Forms page under Aging and Disability – Community Services, CS: Case Management: Provider Page: CS Case Management or https://multco.us/ads/provider-resources-and-forms.

2. After providing a new OPI participant with an invoice for the $25.00 fee, the case manager makes a copy of that invoice for submission to the County with the deliverables at the end of that month. The case manager should add a copy of the invoice to the client hard file. Partners are to submit a single PDF file of scanned invoices each month for any new OPI participants required to pay the fee. The document of the scanned invoices should be named using the following naming convention: MMYY_DC_25FEE .

3. Each DC or EE maintains a spreadsheet listing every OPI participant invoiced for the $25.00 fee. Partners are to maintain this spreadsheet ongoing by:
   a.) adding each new OPI client when invoiced for the fee;

   b.) entering payments as having been made once they show as paid per County UCR Program Fees, Check Received Report. See last page of this document for report instructions.

   c.) following up with participants who have not paid the fee to remind/encourage them to pay.

4. Multnomah County will enter each new participant invoiced for the fee into the UCR system. As participants submit their $25.00 fee to the County, County staff enter the amount paid into the UCR. Program Managers can compare their record of invoices issued to clients/submitted to the County with the UCR Program Fees Invoice Received report. Please **see last page** of this document **for instructions on running UCR report**.

5. Program Managers shall check the UCR report referenced in 3.b. above to identify outstanding payments. Case Managers follow up with participants still owing the $25.00 fee. Once a payment is 30 days overdue, the case manager shall both call the client and send a written notice that their services will be terminated if payment is not received within the next 30 days. Case Managers will need to track the 30-day window, and follow up on terminating services if the client does not pay.

6. The County may periodically ask partners to submit their spreadsheet showing all OPI clients who owe or have paid the $25.00 fee. This ensures that the County and partners have complete and accurate records of clients who have paid or who owe the $25.00 fee.

7. If a participant reports that they cannot or do not wish to pay, the case manager discusses the need to pay something with the participant. They then may request a $25 fee waiver form from the contract liaison. Case managers should submit waiver requests on behalf of clients who report that they are unable to pay the entire $25.00 fee, can only pay a portion, or need to delay the payment, and fully explain the client circumstances on the waiver form. Contract Liaisons evaluate waivers requests on a case- by- case basis.

8. The Contract Liaison fields any questions about this process.

- UCR report instructions-

To locate the report in the UCR showing the $25.00 fees:

1. Click on the "**Reports**" dropdown; additional drop-down options will appear; select '**Supplemental Reports**" then "**Program Fees;**"

2. For "**Date Type**" select "**Check Received**;"

3. Enter the desired **start and end dates** by clicking on the tiny calendar icon;

4. Under "**Assigned To**", select your **agency**; if you have DC and EE, select accordingly;

5. Under "**Program,**" select "**OPI Services**;"

6. Click on the "**View**" button.