Oregon Community Services and Supports Unit
Oregon Project Independence Monitoring Tool 2022

Please submit to SUA.Email@dhsoha.state.or.us.

AAA: Multnomah County ADVSD   Date of Monitoring: November/ December 2021

Contact person for monitoring responses: Contact phone number:

Part 1: AAA Review (if the AAA participates in the pilot include expansion pilot information)

*Respond **No** if there is not a policy or procedure which demonstrates the question. Respond **Yes** if policy or procedure is found **and** is demonstrated. In the explanation section, describe where and how this is verified.*

OPI Administration and Waitlist	No	Yes	Explanation
1. The AAA ensures timely response to requests for OPI services. (OAR 411-032-0005 2) b) C)		x	AAA policy requires that contracted partners respond to referrals from ADRC for OPI program within five days.
2. The AAA regularly evaluates the work being done by their contractors. (OAR 411-032-0005 2) b) L)		x	Data analyst provides contact liaisons with a monthly OPI report with measures to review and share with contractors; contractors submit monthly invoice and OPI waitlist.
3. The AAA has a waitlist for OPI services. (OAR 411-032-0005 2) b) G)		x	Each contractor with OPI submits their agency's OPI waitlist monthly; AAA tracks the individual agency waitlist numbers and the total for the AAA monthly.
a. If yes, how many are on pilot expansion waitlist?			138
b. If yes, how many are on regular OPI waitlist			309
4. The AAA bills consumers who have been assessed as having a fee, or documentation regarding waived fees.		x	Partner agency case managers complete the 0287K at initial assessment and mail out invoice to client for a $25.00 one time fee, or a monthly invoice to clients with a co-pay if served by a HCW; in-home care

(OAR 411-032-0005 2) b) J, K)			agencies bill OPI clients monthly if served by an agency, CM shares fee percentage with agency via 546N and they collect. If client does not have a monthly fee, this is noted on the 546N as well as a one time $25 fee.

Part 2: OPI Consumer Review - to be completed in Survey Monkey

CAPS Assessment Instructions

A list of OPI consumers will be provided by SUA for the review. Please complete the review in Survey Monkey (https://www.surveymonkey.com/r/9F8YGDN) for each consumer. Consumers should not be identified in Survey Monkey by name or prime number, but by the unique identifying number provided with the list of consumers. This review cannot be completed by the staff person who did the CAPS assessment.   If a replacement consumer is needed, please contact OPI Policy at OPI.Policy@dhsoha.state.or.us

Any additional comments or summary on OPI consumer review?

Part 3: Plans to Address Any Identified Gaps

Please identify any areas where your AAA or program partners are not fully meeting the standards, need assistance to meet the standards, or need to take further steps to reach a program goal.

Issue where AAA is not yet meeting standards, or facing challenges	Proposed plan or steps the AAA will take.	Lead or responsible person	Goal date for completion
1. late narration	Provide refresher education on narration standards at CM meeting	contract liaisons	April 2022
2. caps comments	Share CAPS comments training with program managers to go over with staff and also add areas needing improvement to CM meeting agenda	contract liaisons	April 2022
3. assessment narration template	Update to include all required forms and status of forms	contract liaisons	April 2022

Part 4: Areas of Program Success

Please identify any areas where your AAA has been successful in achieving or exceeding its goals while fully meeting the standards, and identify the main factor(s) in achieving success.

Area of success	Brief description of particular program success and sustainability	Main factor(s) leading to particular success (be brief and specific)
1. good narration	Narration was professional and complete, easy to follow	narration training emphasizes professional, non-pejorative language
2. keeping Oregon Access up to date	Case managers are assigned for OPI and service, OPI box checked, demographics completed, narration complete	Contracted agencies assign lead worker who supplements county efforts at QA; agency Program Managers conduct QA using standard tool based on previous monitoring tool
3. maintaining accurate waitlists	Contractors are using waitlist tool, keeping waitlists up to date; waitlists submitted monthly with deliverables	submit waitlist monthly with updated status of scores

Please submit only to SUA.Email@ state.or.us.   Thank you!