

## OPI Consumer Fees: Instructions for OPI Income/Fee Determination

OPI consumer fees, also known as co-pays or pay-ins, are a mandatory feature of the OPI program. Multnomah County uses collected fees to expand OPI services for other eligible older adults who need the service.

Monthly fees for OPI services start at the federal poverty level net monthly income and increase by increments of approximately \$250 up to 200% of the federal poverty level. Consumers with net monthly incomes over 200% of the federal poverty level will pay the full hourly rate of services provided.

The OPI case manager calculates the consumer pay-in at the time of initial determination of eligibility, then at each annual reassessment, or upon consumer request. Case managers calculate pay-ins using a sliding scale called the **OPI Fee Schedule**. There are three schedules: one person household, two person household, and three person household. ADVSD updates the schedules annually to reflect changes in Federal poverty levels and/or OPI contractor rates. You can find the OPI fee schedules on the ADVSD provider page under CS: Case management. [CS: Case Management](#)

There are two parts to the fee assessment process:

1. Assessing the consumer's adjusted income using the OPI fee determination form (0287K)
2. Determining the consumer pay-in using the *OPI Fee Schedule*

The case manager, together with the consumer, completes the **OPI Fee Determination Form 0287K**. This worksheet documents the fee assessment process and assists the case manager in determining the consumer's adjusted income after factoring in allowable medical deductions.

The consumer's adjusted monthly income is the consumer's gross income minus all medical out-of-pocket expenses. "Gross Income" means household income from salaries, interest and dividends, pensions, Social Security, railroad retirement benefits, and any other income prior to any deductions. An individual's gross annual income will include:

- Salaries from the household;
- Interest and dividends from the household;
- Pensions, annuities, Social Security and railroad retirement benefits from the household; and
- Any other net income from the household.

<b>Types of income</b>	<b>Documents used to verify income</b>
Social Security	Social Security award letter or check stub
Pension or Retirement	Bank statement or check stub
Veterans Benefits	Bank statement or check stub
Interest on CDs & Other Investments	Bank statement or tax statement

"Household" means the individual, spouse and any dependents as defined by the Internal Revenue Service; that is, members of the household who file taxes together or are claimed as dependents on consumer's tax return.

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"Adjusted Income" means the income for all household members after deductions for household medical expenses as described in OAR 411-032-0040(1)(b)(D)(i). All medical costs that are the responsibility of the household may be deducted from the individual's gross annual income. These include:

prescription medications	therapies
over-the-counter medications if doctor's RX needed	in-home nursing care
nutritional supplements	medical supplies
hospital expenses	medical equipment
Medicare or other health insurance premiums	co-pays for medical appointments

Deductions may also include non-medical costs that pose an immediate threat to the health and safety of the client (emergency home repairs, emergency transportation, etc., for which the client has exhausted other resources). In addition, all child support paid by a non-custodial parent may be deducted from the individual's gross annual income.

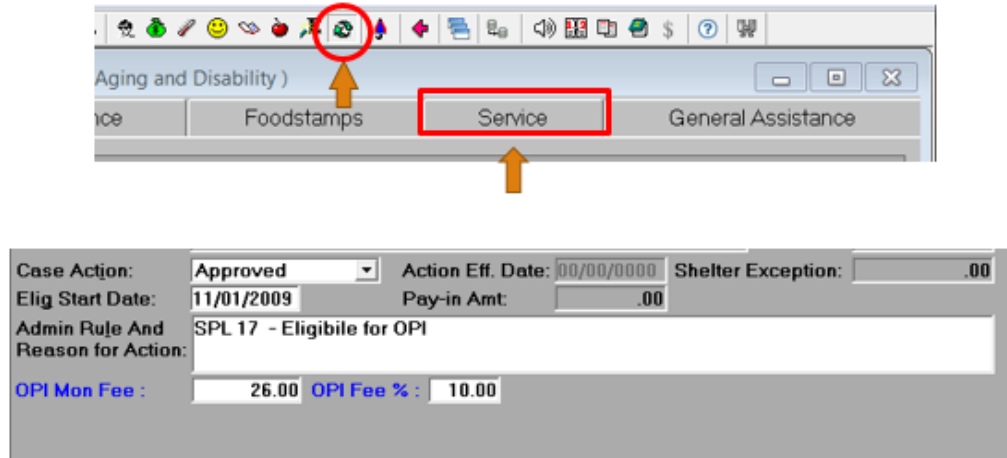
Once the OPI Fee determination form is completed, the consumer and case manager sign and date the form. The signed worksheet is the agreement between the client and OPI program to verify income and determine the client's fair share toward the cost of the services. The case manager gives a copy of the completed and signed worksheet to the client and places a copy in the client case file.

Case managers will provide consumers with written notification of the hourly and maximum monthly fee for service upon initial service eligibility determination, and whenever there is a change.

A \$25.00 one-time fee applies to all individuals determined eligible for OPI services who have adjusted income levels at or below federal poverty level. The case manager invoices the consumer for the fee at the time eligibility for OPI service is initially determined. The partner agency submits a copy of the \$25.00 fee invoice to ADVSD with the deliverables for the month of the determination. ADVSD then knows to expect the consumer's payment, and can enter this into the UCR system.

The case manager records the maximum monthly authorized fee and OPI fee percentage for services on the consumer's Oregon ACCESS record upon initial service determination and at least annually thereafter, at time of reassessment. The case manager enters this information under the green benefits swirl, on the Service tab as shown below:

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The image shows a software interface with a menu bar and a data entry form. The menu bar includes options like 'Foodstamps', 'Service', and 'General Assistance'. The 'Service' option is highlighted with a red box, and an orange arrow points to it. Another orange arrow points to a green icon in the toolbar above the menu. Below the menu is a data entry form with the following fields:

Case Action:	Approved	Action Eff. Date:	00/00/0000	Shelter Exception:	.00
Elig Start Date:	11/01/2009	Pay-in Amt:	.00		
Admin Rule And Reason for Action:	SPL 17 - Eligible for OPI				
OPI Mon Fee :	26.00	OPI Fee % :	10.00		

Case managers will give a copy of the agency policy pertaining to individual non-payment of fees upon initial eligibility determination.

Nothing in the Oregon Administrative rules prevents Oregon Project Independence participants, or their family, from making a donation or contribution. The County uses donations to expand services under Oregon Project Independence.