

OPI Client Fees: Instructions for OPI Income/Fee Determination

Client fees, also known as client co-pays, for OPI services are a mandatory feature of the OPI program and serve to expand OPI services for other eligible seniors who need the service. Fees for OPI services start at the federal poverty level net monthly income and increase by approximately \$25 income increments up to 200% of the federal poverty level. Families with net monthly incomes over 200% of the federal poverty level will pay the full hourly rate of services provided.

OPI client fees are assessed by the district center case manager at the time of service authorization and are based on a sliding fee scale. The sliding fee scale is updated and sent out to district centers by Aging & Disability Services at least once per calendar year to reflect changes in Federal poverty levels and OPI contractor rates.

There are 2 parts to the fee assessment process:

1. Assessing the client's adjusted income using the *OPI Fee Assessment Worksheet*
2. Determining the client fee using the *OPI Fee Schedule*

The case manager together with the client completes the OPI Fee Assessment Worksheet. The Worksheet documents the fee assessment process and assists the case manager in determining the client's adjusted income after allowable medical deductions are factored in.

The client's adjusted monthly income is the client's gross income less 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.

Types of income	Documents used to verify income
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 client's tax return.

"Adjusted Income" means the income for all household members after deductions for household medical expenses as defined in OAR 411-032-0040(1)(b)(D)(i). All medical

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costs that are the responsibility of the household may be deducted from the individual's gross annual income. These include prescription medications, some over-the-counter medications if ordered by a doctor, nutritional supplements, hospital expenses, Medicare or other health insurance premiums, therapies, in-home nursing care, medical supplies and equipment such as adult diapers and hearing aid batteries, and the co-pay expense 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 Worksheet is completed the client and case manager sign and date the assessment. 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. A copy of the completed and signed worksheet is given to the client and a copy is kept in the client case file.

Individuals will receive written notification of the hourly and maximum monthly fee for service upon initial service determination and whenever there is a change.

A \$5.00 annual minimum fee will be applied to all individuals receiving OPI services who have adjusted income levels at or below federal poverty level. The fee is due at the time eligibility for OPI service has been determined and for each 12 month subsequent reassessment. Providers will not be required to make a second attempt to collect Oregon Project Independence fees of \$5.00 or less.

Nothing in the Oregon Administrative rules will prevent Oregon Project Independence individuals, or his or her family, from making a donation or contribution. Such donations will also be used to expand services under Oregon Project Independence.

The maximum monthly authorized fee for services will be recorded on each individual's Oregon ACCESS record upon initial service determination and at least annually thereafter, at time of reassessment.

Individuals will be given a copy of the agency policy pertaining to individual non-payment of fees upon initial eligibility determination.