

DISABILITY, AGING & VETERAN SERVICES
DISTRICT # 2 WASHINGTON COUNTY
OLDER AMERICANS ACT
AREA PLAN
for period of
JANUARY 1, 2008
to
DECEMBER 31, 2012

Updated September 2011

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VERIFICATION OF INTENT

- Type A: OAA, OPI
- Type B: Staff-Contract: OAA, OPI, Medicaid
- Type B: Staff-Transfer: OAA, OPI, Medicaid

This Area Plan document is an Older Americans Act (OAA) requirement and summarizes planned professional services under contract by agency named below and State of Oregon Department of Human Services Seniors & People with Disabilities. The Area Agency named below agrees to provide said services under federal provisions of the OAA, Titles III B, III C1, III C2, III D, III E, and VII, Oregon Project Independence, during the period identified above.

WASHINGTON COUNTY DISABILITY, AGING & VETERAN SERVICES
180 E. Main St., Suite 208
Hillsboro, OR 97123
Mailing Address
155 N. First Ave. MS# 4
Hillsboro, OR 97123-3072

Rod Branyan, HHS Department Head
Jeff Hill, AAA Director
503.846.3080

My signature below endorses this Area Plan and affirms the Plan has been reviewed and approved by the AAA Advisory Council and if applicable, the AAA Governing Body.

Signature

AAA Director
Title

Jeff Hill

Printed Name

9/30/2011
Date

OVERVIEW OF AREA PLAN

SECTION A **OVERVIEW OF AREA PLAN**

The overview must include, at a minimum the following information:

- a) thorough description of the service system, including meeting the needs of rural and low-income minority;
- b) list of designated focal points;
- c) profile of the population to be served by the AAA, including rural and low-income and ethnic minority;
- d) the types of services to be funded and any identified unmet needs;
- e) description of any major changes to the service system planned during the next area plan period, with annual updates; and
- f) description of the area agency planning process used to determine service priorities.

Overview: Washington County, Oregon

Washington County is a suburban County located on the western edge of Portland. Its boundaries extend from the City of Portland to the coast range. The County occupies an area of 727 square miles and has a 2011 population of 529,710. All or parts of the 16 incorporated cities lie within the County and about 58% of the total population are city residents. The largest cities are Hillsboro (population 90,083) and Beaverton (population 88,858). Washington County is a mix of urban, suburban, and rural areas. The eastern half is composed of service industries, light manufacturing, residential and commercial activities. The western half is primarily farms and rural settings together with several smaller incorporated and unincorporated areas. The County has experienced substantial growth over the last several years principally in the electronic and high tech industries.

The County seat is located in Hillsboro and is a home rule county, governed by five elected commissioners who appoint a County Administrator as the chief executive officer. Washington County Disability, Aging and Veteran Services (WCDAMS), a division of the County's Health and Human Services Department, is the designated Area Agency on Aging for the County and charged with providing leadership in planning and developing services to meet the needs of the county's most vulnerable elderly and disabled citizens.

According to 2011 data from the Administration on Aging, approximately 79,137 adults over age 60 reside in Washington County, representing 14.9% of the

total

population. That number is expected to rise significantly over the next 20 years with the aging of the baby boomers, who began turning 60 in 2006. During the four years covered by this plan 20,491 Washington County residents will turn 60 years old; that number increases to 50,541 over the next ten years. This cohort presents communities with the challenge of planning new and innovative ways to capitalize on the diverse assets of these older adults, while developing the capacity to support citizens who will live longer than ever before.

The three areas in the County with the highest concentration of elders age 65 and over, are King City and the southern part of Tigard, parts of Beaverton (north and west) and southwest Portland, and Forest Grove. Nearly seven percent (6.9%) of Washington County residents live in rural areas. Ethnic minority groups make up approximately 34.3% of the total population in Washington County.

Racial/Ethnic Group	Percent of Total Population
Hispanic or Latino	15.7% (2% of the over 65 population)
Asian	8.6%
Black/African American	1.8%
American Indian/Alaska Native	.7%
Other races	7.5%

Service Overview:

As a public agency mandated to plan and develop services, WCDAVS' mission is "to create options to maintain the quality of life." Attention has been paid to expanding our role with minority communities traditionally under-served. We serve older persons in greatest social and economic need, veterans of all ages, and unpaid family caregivers caring for those over age 60. Through the Lifespan Respite program, we serve caregivers for persons of all ages who have physical, mental or developmental disabilities. We focus our resources on strategies which identify, prevent or mitigate the needs of those who exhibit one or more of the following characteristics: lives alone, is socially isolated, is limited in the ability to perform activities of daily living, lives in a rural area, is a low-income minority, has limited English-speaking ability, is a voluntary caregiver, is physical mobility and transportation limited, has chemical dependencies, or has poor physical or mental health.

WCDAVS is a Type A agency and has responsibility for Older Americans Act , Oregon Project Independence, Veteran Services and SHIBA. Programs are

provided directly by WCDAVS and are administered through our office in Hillsboro.

WCDAVS employs a staff of 22 to administer and provide Older Americans Act, OPI, SHIBA and Veteran services and partners with community organizations in developing quality services to meet the needs of a growing elderly population. We contract with approximately 28 community businesses and organizations to deliver services in the following areas: nutrition, counseling, money management, elder abuse, informational and outreach publications (newsletter and community resource directory), home repair, home and personal care, legal aid, caregiver support, RN services, volunteer transportation, friendly visiting, and homemaker services, durable medical equipment, and specialized services for ethnic populations. WCDAVS staff provide direct services in the following areas: information and assistance, case management for OAA and OPI clients, family caregiver support, lifespan respite, SHIBA services, and veteran services. As the focal point for older adult services in Washington County, we also provide public information, education, community presentations, service planning and resource development. Last year agency in-house volunteers provided 1.70 FTE. Without volunteers many public and private programs would not exist in these times of smaller budgets and over-stretched resources. Volunteers will be even more critical in the near future, just by the sheer numbers of baby boomers retiring. Initially there will be a larger pool of volunteers to help us with our mission, but there will also be greater needs to fulfill. The Volunteers! Program will play an important role in continuing to identify current and future volunteer needs.

WCDAVS provides staff support to the Aging and Veteran Services Advisory Council (AVSAC). This council provides advice and direction to WCDAVS in designing and implementing our package of services. Volunteers on this council are instrumental in developing our strategic plan and advocating for funding, resources, and programs for elders and Veterans.

Services to Ethnic Minorities and those living in rural areas: Services developed to serve low income rural and minority elders include:

- A partnership with our nutrition services provider, Loaves and Fishes Centers, Inc. and Sherwood's Cat Adoption Team (CAT) provides seniors receiving home delivered meals needed food for their companion pets. The

program will expand to serve additional home delivered meal recipients in Washington County, and should expand to include a delivery of food for companion dogs as well.

- Expanded Hispanic meal programs through our nutrition provider, Loaves & Fishes, have been developed in Beaverton, Hillsboro, and Forest Grove. Fitness programs and both Spanish and English classes have been developed in conjunction with the meal programs.
- The “Powerful Tools for Caregivers” a caregiver training program was taught in Spanish and Korean
- Family Caregivers from rural areas, and Asian and Latino minority caregivers participated in the Family Caregiver Training series offered in partnership with No Worries In Home Services
- For the first time, the Washington Co. Grandparents Raising Grandchildren conference was offered in English and Spanish sessions; a small group of Latino grandparents attended the conference.
- Expanded caregiver support programs were developed in partnership with Asian Health and Service Center.
- Expanded meal service and fitness programs were developed in partnership with Loaves and Fishes and the North Plains Senior Center, an organization located in and serving a rural area of the County.
- Project REACH assisted isolated seniors living in the rural area of Gales Creek and rural southern Washington County by linking them into services to support their independence.
- Washington County SHIBA Program partners with Centro Cultural, Virginia Garcia Clinic and Easter Seals Oregon (Latino Connection Program) to reach and assist Hispanic individuals. Efforts have included training staff to use Medicare.gov website so they may help their clients; providing Medicare presentations; posted Spanish SHIBA flyers; distributed Spanish SHIBA brochures.
- Two of our Certified SHIBA Counselors have assisted the State SHIBA Office by accepting and helping Spanish callers from all over the State.
- Washington County SHIBA Program partners with the National Asian Pacific Center on Aging (NAPCA). NAPCA assists Chinese, Korean and Vietnamese individuals with their Medicare Prescription Drug benefits.
- Our Russian speaking SHIBA counselor has been instrumental spreading the “SHIBA” word in the monthly Russian Business Publication and Russian Community magazine; translated SHIBA/Medicare publications for

Washington and Multnomah Counties; attended many presentations as a translator in both counties.

- Washington County SHIBA counselors speak Spanish, Russian, German, Dutch, French, Portuguese, Mandarin Chinese and Taiwanese.
- SHIBA counselors have helped clients in rural areas of Washington County by meeting and providing presentations at senior centers, libraries and churches.

List of designated focal points (FY 2010-2011)

- 1) Washington County Disability, Aging and Veteran Services; Hillsboro, Or.
- 2) Community Senior Center of Hillsboro; Hillsboro, Or.
- 3) Elsie Stuhr Center; Beaverton, Or.
- 4) Forest Grove Senior Center; Forest Grove, Or.
- 5) Marjorie Stewart Senior Center; Sherwood, Or.
- 6) Tigard Senior Center; Tigard, Or.
- 7) Tualatin-Durham Senior Center; Tualatin, Or.
- 8) North Plains Senior Center; North Plains, Or.
- 9) All Saints, 372 NE Lincoln St., Hillsboro, OR 97124

Services To Be Funded:

During the next area plan period, WCDAVS intends to continue funding the following services:

Area Agency on Aging Programs:

- OPI (Oregon Project Independence)—Case management, I&A, home and personal care, respite, RN visits, assisted transportation, home delivered meals, adult day services, home repair, money management, durable medical equipment, and chore services, as authorized by case managers.
- OAA (Older Americans Act) Services—Information and referral/outreach, case management, home repair, telephone reassurance, money management, nutrition, legal services, family caregiver support services, volunteer services, medication education, Gatekeeper and elder abuse prevention through the ElderSafe program.

Other Services—SHIBA, Veterans', Project Reach, VHCBS, BEC, and CLP

Veteran Services:

The Veteran Services Program's mission is to provide assistance to veterans and their dependents in obtaining federal, state, and local benefits. This is accomplished through:

- Active outreach within local communities, at health care facilities, and through in-home visitations.
- Providing assistance in filing claims for benefits with the Federal and State Veterans' Affairs Departments and acting as representative for veterans in appeals concerning claims with the U.S. Department of Veterans' Affairs.
- Linking potentially eligible veterans with Community resources such as: OAA, OPI, Medicaid and Food Stamps programs.
- Ongoing services to educate and assist veterans, their dependents, and other veteran representatives, groups and organizations. An example of an ongoing service is the program developed with Pacific University is the PTSD (Post Traumatic Stress Disorder) Counseling Service, offered in partnership with Pacific University's psychology clinic. Intern counselors provide individual and group counseling to veterans suffering from PTSD and their families. This is a one-of-a-kind service not offered elsewhere and has been so successful that it is now entering its fifth year and additional funding to serve more veterans and their families is needed.

Strategic Planning Process:

From August 2011 to January 2012 we are writing a new Strategic Plan that will become effective January 31, 2012 through December 31 2014. The process includes conducting six focus groups for community input, a SWOT analysis of DAVS. The process is being conducted by a contracted facilitator who is working with a steering committee made up of staff and Senior Advisory Committee members. The Plan will be presented to the full Senior Advisory Committee at their January 2012 meeting for review and approval.

Planning Activities:

1. In March 2011, DAVS was one of 10 grant recipients from the National Council on Aging to establish a Benefits Enrollment Center (BEC) in Washington County. Through this grant, DAVS provides outreach and enrollment assistance for core low income benefits to seniors and people with

disabilities including SSI, LIS, SPDP, Medicaid, SNAP, Property Tax Relief, LIHEAP and Veteran Benefits. Core start-up functions for the BEC have included development of policies & procedures, training & marketing materials. The BEC grant will run 3/1/11-2/28/13 with the goal of screening 1,300 potentially eligible participants and assisting them in a person-centered manner to enroll in benefit programs.

2. DAVS completed a Readiness Review process required to enact a Provider Agreement with the VAMC implementing the Veteran Directed Home & Community Based Services (VDHCBS) program. The VDHCBS will allow eligible veterans to obtain needed in-home services and supports which will ensure their independence in the community. Veterans will choose their menu of approved services as well as hire and direct their in-home support persons. The VDHCBS Provider Agreement will be an ongoing funding source based on allowed Federal funding.

3. DAVS continues to provide Options Counseling via Community Living Program grant funding from AoA received September 2009 for a two year demonstration. This program provides long term care options and other resource information to eligible clients at risk of nursing facility placement and spend down to Medicaid. Washington County has received a large portion of the almost 100 referrals via partnerships with Tuality Community Hospital, Providence St. Vincent Medical Center and the Providence Clinics in our area. Planning has begun to discuss future funding opportunities with all health partners to sustain the program once grant funding ends.

This section will also be updated with completion of Strategic Plan.

Changes Next Area Plan Period (FY 2010 – 2011)

1. To meet the goals of improved information and assistance and outreach, the following is planned:

- Improved training through AIRS for Information and Assistance specialists.
- Development and dissemination of additional public education materials, particularly related to available transportation and housing services.
- Continued development of bilingual outreach materials.
- Expansion of a community outreach program. "REACH" will recruit and train volunteers who can work in the community and serve as advocates for individuals who have need of information, resources and services.
- A plan, using staff and volunteer resources, has been developed to provide outreach through the community focal points and senior centers.

2. To meet the goal of serving the most frail and vulnerable elders and preventing self-neglect and elder abuse, a money management/guardianship/conservator service has been fully developed in partnership with the Impact NW, Senior Gap program.

3. To meet the goal of serving isolated, underserved seniors, a senior center/meal program will be developed in Aloha and at least one satellite meal program will be implemented in a rural area in partnership with Loaves and Fishes Centers, Inc.

4. To meet the needs of frail elders around health, safety and independence, WCDAVS will develop a contract with a Medical Alert provider in partnership with OPI.

5 Washington County Disability, Aging & Veteran Services has become a partner with the Cities Readiness Initiative to serve as a Push Partner. In June 2011, we performed an actual exercise that included all DAVS staff in the event of an actual anthrax event. By agreeing to be a Push Partner, DAVS would be able to assist in dispensing medication out to the population who are homebound or unable to get to a POD (Point of Dispensing), in the event of a pandemic influenza or anthrax emergency event. By doing this, the medication would be dispensed to our clients in a quick and efficient manner when time is of the essence.

ADMINISTRATION

**Governing Body
Advisory Council
Organizational Chart
Administrative Goals and Objectives
Other Programs & Activities**

SECTION B-1
AGENCY'S GOVERNING BODY

List all members of the Governing Body (Board of Directors, COG Board, County Commissioners) indicating officers by title and the date each member's term of office expires.

Agency's Governing Representative Name & Contact Information	Date Term Expires (if applicable)	Title/Office (if applicable)
Andy Duyck 155 N First Avenue, MS 22 Hillsboro, OR 97124-3072	12/2014	At-Large Chair Commissioner
Dick Schouten 155 N. First Avenue, MS 22 Hillsboro, OR 97124-3072	12/2012	District 1 Commissioner
Greg Malinowski 155 N. First Avenue, MS 22 Hillsboro, OR 97124-3072	12/2014	District 2 Commissioner
Roy Rogers 155 N. First Avenue, MS 22 Hillsboro, OR 97124-3072	12/2012	District 3 Commissioner Vice-Chair
Bob Terry 155 N. First Avenue, MS 22 Hillsboro, OR 97124-3072	12/2014	District 4 Commissioner

Additional Comment:

SECTION B-2
AREA AGENCY ADVISORY COUNCIL

List the names of all Advisory Council members and indicate when the term of office expires for each member. Please indicate in the Category of Representation column all population segment(s) each member is representing. One person can represent more than one segment of the population. Refer to 45 CFR 1321.57 and OAA 306(a) (6) (D)

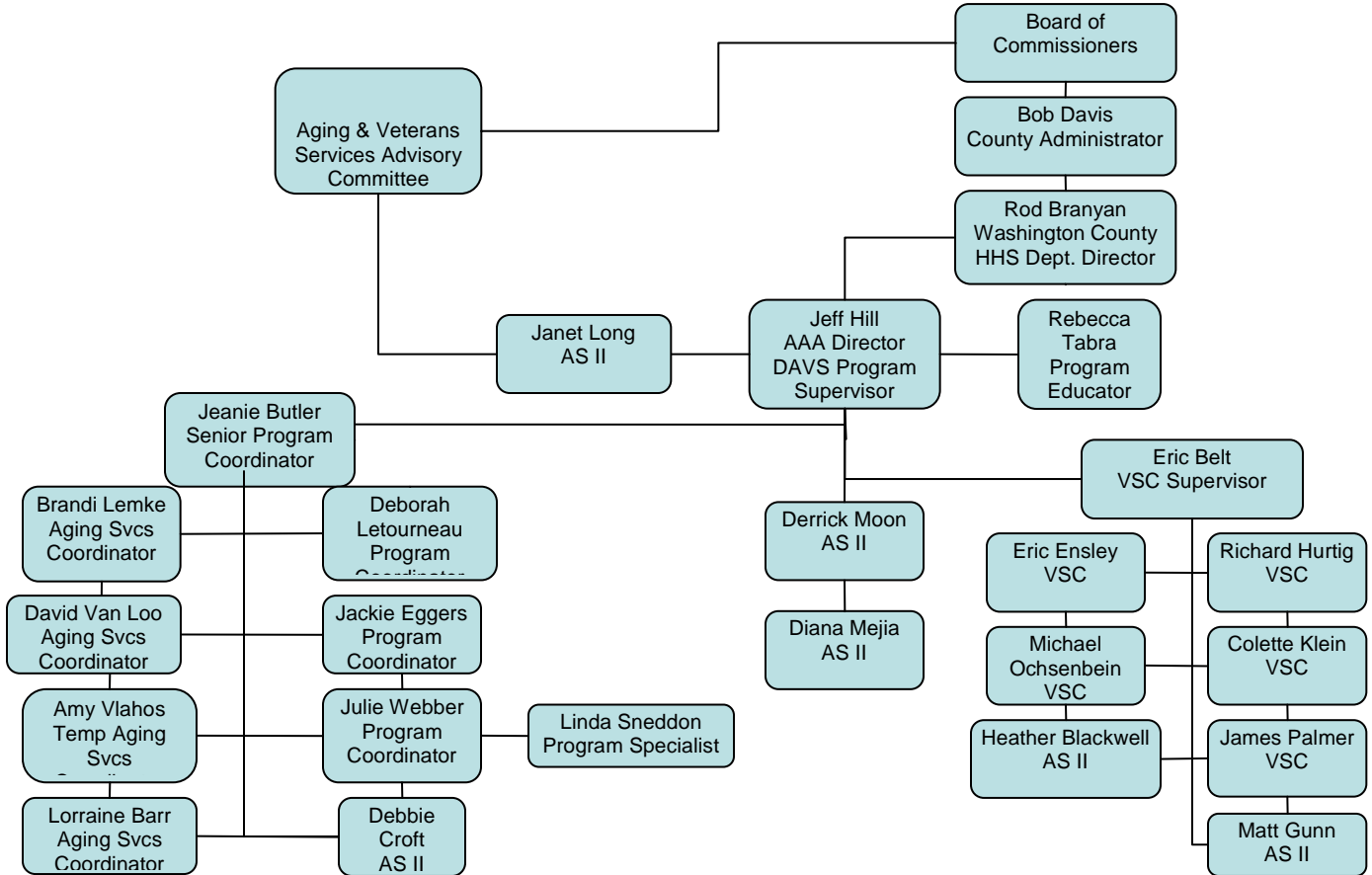
Name & Contact Information	Date Term Expires	Category of Representation
Mark Becker 10750 SW Wedgewood St. Portland, OR 97225 503-758-7387 503-644-9668 albright.becker@gmail.com	6/30/2013	<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input checked="" type="checkbox"/> General Public <input checked="" type="checkbox"/> 60+ <u>DAVS Client</u>
Kurt Carlsen 3040 Lavina Drive Forest Grove, OR 97116 503-526-2711 503-357-7005 kurt.j.carlsen@state.or.us	6/30/2014	<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input checked="" type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input type="checkbox"/> General Public <input type="checkbox"/> 60+ <u>DAVS Client</u>
Roger B. Fields 13810 SW Harness Lane Beaverton, OR 97008 503-524-9834 roger_fields@msn.com Vice Chair	6/30/2014	<input checked="" type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input type="checkbox"/> General Public <input type="checkbox"/> 60+ <u>DAVS Client</u>
John Hartner 753 NE Rogahn Hillsboro, OR 97124 503-681-9108 hartner3@gmail.com	6/30/2014	<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input checked="" type="checkbox"/> General Public <input type="checkbox"/> 60+ <u>DAVS Client</u>

Name & Contact Information	Date Term Expires	Category of Representation
<p>Ian Johnson 137 SW 206th Avenue Beaverton, OR 97006 503-956-7918 ian.johnson@va.gov</p>	6/30/2014	<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input checked="" type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input type="checkbox"/> General Public <input type="checkbox"/> <u>60+ DAVS Client</u>
<p>Patricia L. Maberry 17340 SW Augusta Lane Beaverton, OR 97045 503-649-2739 pmaberry2002@yahoo.com Past Chair</p>	6/30/2014	<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input checked="" type="checkbox"/> General Public <input type="checkbox"/> <u>60+ DAVS Client</u>
<p>Young Nelson 75 SW 90th Avenue Portland, OR 97225 503-922-0256 503-810-0432 youngcnelson@gmail.com</p>	6/30/2014	<input type="checkbox"/> 60+ Veteran <input checked="" type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input type="checkbox"/> General Public <input type="checkbox"/> <u>60+ DAVS Client</u>
<p>Betty Pomeroy 2015 NE Trisha Dr. Hillsboro, OR 97124 503-681-9011 bettpom@aol.com Chair</p>		<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input type="checkbox"/> General Public <input checked="" type="checkbox"/> <u>60+ DAVS Client</u>
<p>Bob Terry 155 N. First Avenue, MS#21 Hillsboro, OR 97124 503-846-8681 bob_terry@co.washington.or.us</p>	6/30/2014	<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input checked="" type="checkbox"/> Elected official <input type="checkbox"/> General Public <input type="checkbox"/> <u>60+ DAVS Client</u>

Name & Contact Information	Date Term Expires	Category of Representation
Glenna Wilder PO Box 915 North Plains, OR 97133 503-349-8539 avsac@compuhelpservices.com	6/30/2013	<input type="checkbox"/> 60+ Veteran <input type="checkbox"/> Minority <input checked="" type="checkbox"/> Rural <input type="checkbox"/> Veterans provider <input type="checkbox"/> -60 Veteran <input type="checkbox"/> Veteran Healthcare Provider <input type="checkbox"/> Elected official <input type="checkbox"/> General Public <input type="checkbox"/> <u>60+ DAVS Client</u>

SECTION B-3
ORGANIZATIONAL CHART(S)

Insert organizational chart(s) that clearly show the functional organization of the Area Agency sponsor and the Area Agency on Aging.



SECTION B-4

ADMINISTRATIVE GOALS AND OBJECTIVES

Listed goals and objectives must be measurable in terms of results and have a target date or time duration for accomplishment. Goals and objectives must be reviewed and updated annually with accomplishments noted for the previous year's goals.

As required by the Older Americans Act you must have goals and objectives in the five areas explained below. Please indicate the type(s) of each goal in the table. Some goals may cover more than one area.

Administration: Administrative functions required to implement planned services, maintain records, fulfill the requirements of Federal regulation, State rules, and Community Independence & Advocacy/State Unit on Aging policies and procedures. Support advisory committees. Includes such functions as bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring and quality assurance.

Advocacy: Monitor, evaluate and comment on issues related to community actions affecting older persons; conduct or attend public hearings; represent older persons' interests at the local, state and national levels.

Coordination: The coordination of programs funded through the Older Americans Act with other supportive federal, state, local or private programs. Coordination is a continuing activity linking, in support of common service objectives, existing planning and service resources on a cyclical and ongoing basis.

Development: Functions directed toward the development of specific service(s), goals or objectives. Includes such functions as needs assessment, plan development, budgeting/resource analysis, inventory, standards development, policy analysis, resource development and research.

Outreach: Efforts used to identify individuals eligible for assistance under the Older Americans Act, with special emphasis on:

- older individuals residing in rural areas;

Outreach, continued

- older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);
- older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas);
- older individuals with severe disabilities;
- older individuals with limited English-speaking ability;
- and older individuals with Alzheimer’s disease or related disorders.

GOAL DESCRIPTION A=Administration B=Advocacy C=Coordination D=Development E=Outreach	MEASURABLE OBJECTIVES	ACTIVITIES	DURATION	(Complete this column as Achieved and submit this section with your annual AP updates) OUTCOMES/ ACCOMPLISHMENT
<input checked="" type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/> E Maintain and support active and diverse Aging and Veterans services advisory councils.	*Review and update bylaws annually *Recruit/appoint a minimum of 13 diverse members *Develop and implement agency 2012-2014 strategic plan	*Hold monthly meetings *Maintain records and minutes *Provide training and information to council members *Develop an annual work plan to accomplish strategic plan goals.	Ongoing	Reviewed bylaws & updated 8/3/2010

<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION <input checked="" type="checkbox"/>A <input type="checkbox"/>B <input type="checkbox"/>C <input type="checkbox"/>D <input type="checkbox"/>E Develop contracts with community organizations and partners to deliver OAA and OPI services.</p>	<p>MEASURABLE OBJECTIVES</p> <p>*All contracts (100%) to provide OAA and OPI services will be developed following the county's legal rules for procurement process. *Within one year, 75% of all contracts will be monitored following county's monitoring protocols to assure quality services are delivered. *Accurate records and accounting systems will be in place to assure proper use of funds.</p>	<p>ACTIVITIES</p> <p>*Hire qualified staff to develop and implement contracts. *Provide training in county contracting rules and processes. *Write RFPs and contracts *Develop monitoring tool for each service offered. *Monitor expenditures, billings, accounting records on a monthly basis.</p>	<p>DURATION</p> <p>Ongoing</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p> <p>Monitoring templates and schedules have been developed for all DAVS contracts and are reviewed by the Senior Program Coordinator. Enhancements in expenditure reviews were also developed adding an additional layer of expenditure review and approval</p>
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<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION <input type="checkbox"/>A <input checked="" type="checkbox"/>B <input type="checkbox"/>C <input type="checkbox"/>D <input type="checkbox"/>E Advocate for increased funding for senior programs at the local, state and national level</p>	<p>MEASURABLE OBJECTIVES</p> <ul style="list-style-type: none"> *Increase OPI funding at state level *Increase non-Medicaid service Funding at the State level 	<p>ACTIVITIES</p> <ul style="list-style-type: none"> *Prepare fact sheets and briefing for advisory council members *Participate in O4AD meetings and activities *Advisory council members meet with legislators 	<p>DURATION</p> <p>During annual legislative sessions</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p> <p>During the 2010-11 legislative session DAVS SAC members and AAA director made monthly visits to Legislators to educate on Senior issues and worked to fund OPI. Funding was renewed for OPI but not at levels that could grow the program only maintain current service levels. Will continue advocacy for funding in 2012 Legislative session.</p>
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<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION</p> <p><input type="checkbox"/>A <input checked="" type="checkbox"/>B <input type="checkbox"/>C <input type="checkbox"/>D <input type="checkbox"/>E</p> <p>Educate public and community leaders and raise awareness about the age wave and need for additional, improved services to meet the needs of a growing senior population.</p>	<p>MEASURABLE OBJECTIVES</p> <p>*Hold community forums/presentations at a minimum of four times per year</p> <p>*Prepare newspaper articles/press releases at least quarterly</p> <p>*Hold formal briefings for county commissioners on annual basis</p>	<p>ACTIVITIES</p> <p>*Prepare presentations</p> <p>*Train staff and volunteers to do community presentations</p> <p>*Advertise the availability of presentations and respond to public requests</p> <p>*Prepare annual updates of senior needs in Wash. County</p>	<p>DURATION</p> <p>Ongoing</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p> <p>Participated in presenting to CPO (Citizen Participation Organization) groups in Washington County on various occasions.</p> <p>Have created numerous press releases for the organization including the strategic plan, veteran's benefits and job fair and recruitment of volunteers to help aid seniors.</p> <p>Currently planning a joint seminar with Addictions in HHS at Jennings McCall Assisted Living facility.</p> <p>Created and delivered orientation/training to new volunteers for the Benefits Enrollment Center so that they will be equipped to go in the field and work with clients.</p>

<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION <input type="checkbox"/>A <input type="checkbox"/>B <input checked="" type="checkbox"/>C <input type="checkbox"/>D <input type="checkbox"/>E Coordinate and fund a money management/guardianship program in partnership with Forest Grove Gap.</p>	<p>MEASURABLE OBJECTIVES</p> <ul style="list-style-type: none"> *Develop and implement contract with the GAP, using OAA/OPI funds *Assure that a minimum of 10 clients per year are served through contract *Seek additional grant funding and county general funds to expand services 	<p>ACTIVITIES</p> <ul style="list-style-type: none"> *Submit CDBG grants *Submit private foundation grants *Coordinate activities with county mental health and DD departments to increase county funding *Staff will provide technical support and resources to the GAP 	<p>DURATION</p> <p>2 years</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p> <p>Awarded \$99,891.00 CDBG grant in 2008, which enabled Senior GAP to expand their services in Washington Count. The grant also enabled Senior GAP to establish financial stability and leverage CDBG funds to raise additional dollars to expand their services to vulnerable seniors. In 2010 Senior GAP merged with Impact NW, further strengthening and securing their program & services to seniors. Developed & implemented contract with Senior GAP to provide an Emergency Money Management Service (EMMS) serving OAA qualified seniors</p>
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<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION <input type="checkbox"/>A <input type="checkbox"/>B <input checked="" type="checkbox"/>C <input type="checkbox"/>D <input type="checkbox"/>E Expand nutrition sites and senior center programs in Washington County in coordination with Loaves & Fishes Centers, Inc.</p>	<p>MEASURABLE OBJECTIVES</p> <p>*Develop at least 5 new partners in expansion of nutrition and senior center sites. *Provide increased information and access services in at least two additional senior center/nutrition sites each year *Support L&F in developing satellite sites in Banks and Aloha</p>	<p>ACTIVITIES</p> <p>*Program development staff will actively work with faith, business and other community agencies to support nutrition site/senior center programs *Staff will provide technical support and assistance to L&F in developing additional sites *Train and support volunteers who will provide community I&A and outreach</p>	<p>DURATION</p> <p>2 years</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p> <p>Meal Sites have partnered with local businesses, housing complexes and churches during renovation of the centers. Volunteers placed in 4 Loaves and Fishes Centers to offer I&A Planning resulted in preferences for clients to attend meal service at North Plains, site in Aloha not confirmed, but addressed, staff attends Loaves and Fishes site planning committee meetings</p>
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<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION <input type="checkbox"/>A <input type="checkbox"/>B <input checked="" type="checkbox"/>C <input type="checkbox"/>D <input type="checkbox"/>E Increase medication education services for older adults in Washington County</p>	<p>MEASURABLE OBJECTIVES</p> <ul style="list-style-type: none"> *Develop a formal partnership with Tuality Community Hospital and Pacific University to develop program *Develop and implement a contract with Pacific University to provide medication education to DAVS clients and seniors in community. *Serve a minimum of 20 clients within the first year of service 	<p>ACTIVITIES</p> <ul style="list-style-type: none"> *Develop standards and training for program *Develop marketing plan to increase community awareness of the service *Refer clients in need of service to Pacific Univ. students *Monitor and follow up to assure clients receive quality service 	<p>DURATION</p> <p>1 yr/development 2 yrs/full implementation</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p> <p>Pacific University faculty & advanced pharmacy students provided medication reviews to 25 people during a "Healthy Aging" half day conference, June 2011 Contract discussions are underway to contract with RN's as client consultants instead of university faculty & students for OPI/OAA medication management implementation is underway and on-going</p>
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<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION</p> <p><input type="checkbox"/>A <input type="checkbox"/>B <input type="checkbox"/>C <input checked="" type="checkbox"/>D <input type="checkbox"/>E</p> <p>Increase outreach services through development of Project Reach, a program using volunteers to advocate for seniors</p>	<p>MEASURABLE OBJECTIVES</p> <p>*Recruit and train five volunteer advocates for pilot project in year 1. *Develop coalition of at least 5 partner organizations to advise on program and develop additional resources *Fully implement program in second year with recruitment and training of at least 20 volunteers to serve entire county.</p>	<p>ACTIVITIES</p> <p>*Hire Program Coordinator to develop program *Develop standards and training for program. *Recruit and train volunteers *Refer seniors who need help with gathering & processing information; need resources or services</p>	<p>DURATION</p> <p>2 Years</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p> <p>Developed pilot Project REACH, an outreach and advocacy service for isolated seniors, in 2008 with assistance of five volunteers & Program Coordinator, they developed protocols & partnerships, & received 74 requests for service. Project was assisted 2nd year by Aging Services Coordinator who grew project & supports work of the volunteers. Project has 10 volunteers & has received more than 250 requests for service.</p>

<p>A=Administration B=Advocacy C=Coordination D=Development E=Outreach</p> <p>GOAL DESCRIPTION</p>	<p>MEASURABLE OBJECTIVES</p>	<p>ACTIVITIES</p>	<p>DURATION</p>	<p>(Complete this column as Achieved and submit this section with your annual AP updates)</p> <p>OUTCOMES/ ACCOMPLISHMENT</p>
<p><input type="checkbox"/>A <input type="checkbox"/>B <input type="checkbox"/>C <input type="checkbox"/>D <input checked="" type="checkbox"/>E</p> <p>Increase community access to information and assistance and expand outreach efforts to assure that a range of services and resources are available to elders, veterans, and people with disabilities</p>	<p>*Improve telephone, reception and access to DAVS staff within one year</p> <p>*Provide public education and service information by updating all agency brochures and public presentations within one year.</p> <p>*Develop effective outreach programs to serve multi-ethnic communities through partnerships with a minimum of three other organizations</p>	<p>*Develop a plan to streamline internal operations--telephone and reception</p> <p>*Increase and enhance training for I&A staff</p> <p>*Develop public education materials, newspaper articles, resource guide and disseminate within community</p> <p>*Translate materials into Spanish</p> <p>*Continue to develop partnerships with multi-ethnic organizations as a means to disseminate information</p>	<p>Ongoing</p>	<p>Achieved by going to County phone system and 6 I&A support staff answering phones.</p> <p>Training through AIRS</p> <p>Achieved updating agency brochures and presentations</p> <p>Ongoing</p>

SECTION B-5

OTHER PROGRAMS AND/OR ACTIVITIES OF THE AAA

Explain all other coordinated services/activities of the area agency whether funded by public or private funds and NOT funded by the State provided OAA, OPI, and Medicaid allocation, nor indicated in Section D-1. (OAA 306(a)(12))

Describe each type of activity and source of funding of each activity. (e.g., Low-Income Home Energy Assistance Act, Community Services Block Grant Act, Titles XVI, XVIII, XIX and XX of the Social Security Act, Housing & Community Development Act, Workforce Investment Act, etc.)

Veteran Benefit Services: WCDAMS is committed to helping veterans of all ages and their families in Washington County. The Veterans Services Unit includes one Veterans Service Supervisor, five Veterans Service Coordinators' (VSC) and two Administrative Specialists II--all Washington County positions. Funding for Veterans' is County and State general funds.

The VSC's counsel and assist veterans and their dependents in filing for federal, state, and county veteran benefits. They also advise and refer veterans and their dependents who have potential eligibility for Medicaid benefits, to Aging Services and assist Aging Services in placing veteran/Medicaid clients in care facilities or obtaining fiduciary assistance for incompetent individuals. They provide information/training to Aging Services case managers on veterans benefits programs and develop and maintain close liaison with other service agencies providing assistance to veterans and their dependents.

Veterans benefits include: (1) burial expenses, (2) death pension--for surviving spouses and unmarried children under 18 of deceased veterans, (3) disability compensation—monthly payments to veterans with disabilities, (4) medical care—available to all eligible veterans with priority given to those with service-connected disabilities (hospitalization, outpatient treatment and nursing care), and (5) pension—available for those with wartime service whose income is within prescribed limits and are permanently and totally disabled.

SECTION B-5: OTHER PROGRAMS AND/OR ACTIVITIES OF THE AAA (Cont.)

Volunteers! Program: The WCDAVS Volunteers! Program recruits volunteers and interns of all ages who wish to work with seniors and veterans. This program supports the efforts of DAVS in their diverse missions to serve our community.

The Volunteers! Program identifies agency volunteer needs and recruits the volunteers to work within the agency. Current positions provide clerical assistance, case management, information and referral, education and outreach, and advocacy. These positions have enhanced and expanded (leveraged) the work of our paid staff. Through the utilization of a strong volunteer program the agency has been able to enhance our service delivery.

The impact of this program - The important work of helping clients get services has expanded all due in part to our volunteers. Without these volunteers, we would not be able to assist the large number of clients that we normally would with our existing resources. With the new Benefits Enrollment Center underway, just since June 2011, we have assisted 130 clients in getting services with a solid base of eight volunteers dedicated to this program. It is projected to assist over 1,200 clients over the next two years. We also have nine Project REACH volunteers who perform temporary case management with clients and have served approximately 100 clients in the last FY.

Our SHIBA (Senior Health Insurance Benefits Assistance) Program performs a lot of outreach and has helped more than 950 clients in their selection of Medicare providers and/or prescription assistance.

For all the important work that is going on in our Division we had 84 volunteers dedicate 9m338.75 hours last FY which estimates a total of \$199,475.70 to our organization.

By involving volunteers both in and out of the office we are providing outreach to the community. We are supplementing staff resources and adding value to the organization and its work. We are engaging needed skills when the resources of staff time are limited. We are able to give a more personal touch by reaching out to our clients in their homes or in agreed upon places in the community such as a senior center or a coffee shop.

We include volunteers in our agency because they make a difference in the lives of our clients.

Senior Insurance Benefits Assistance (SHIBA) Program: SHIBA is a statewide network of trained volunteer counselors who educate, assist, and serve as advocates for people with Medicare. Certified SHIBA counselors help people with Medicare understand their rights and options in health insurance, so that they can make informed choices.

WCDAMS recruits and screens SHIBA counselors, provides training, facilitates regular support meetings with volunteers, tracks counselor certification progress, evaluates counselor performance and maintains and submits written reports to County, State and Federal Governments. We have SHIBA counselors who are fluent in Spanish, Russian, German, Dutch, French, Portuguese, Mandarin Chinese and Taiwanese.

Last year over 20 SHIBA counselors contributed a total of 6,085 hours assisting and enrolling over 958 individuals in Washington County. Multiply the hours by the National estimated dollar value of volunteer time the total is \$129,976.00!

Several Certified SHIBA counselors conducted a total of eighteen (18) Medicare "101" classes at Tualatin Hills Park and Recreation District location at Elsie Stuhr Center, Portland Community College, and other Washington County organizations/businesses.

SHIBA will continue to conduct presentations throughout Washington County. Last enrollment period:

- 81 outreach events were held. These included presentations, enrollment events, pharmacy outreach and several fairs.
- 2,424 individuals were reached through those presentations and events.
- 307 were enrolled in the Low Income Subsidy Program (extra help) through WC SHIBA outreach efforts.

- We have provided articles for many partners in the community in an effort to reach more individuals who may qualify for LIS. Examples would be the Loaves & Fishes newsletters and Community Action Energy Assistance mailing

Crime Victims Assistance: Elder Safe Program: WCDAMS funds through OAA Title VII dollars the Elder Safe Program, in collaboration with the

Washington County Sheriff's Office. The project identifies over 1,000 elder (65+) crime victims each year through the Portland Police Data System (PPDS), and through police reports submitted by Tigard, Hillsboro, Beaverton, Banks, Cornelius, Gaston, King City, North Plains, Tualatin, Forest Grove and Sherwood Police Departments and the Washington County Sheriff's Office. Other crime victims are identified through the Washington County District Attorney's Office and referred to Elder Safe.

Crime victims are contacted to inform them of the availability of crime victims' services, information relating to the criminal justice system, OAA, OPI, services and other community services that can meet medical needs and assist them through their trauma.

In addition, Elder Safe provides these services:

- Home visits and/or phone contact to provide personalized assistance to crime victims negotiating the criminal justice system.
- Expediting cross referral of of elder abuse and crime reports between Adult Protective Services and Washington County law enforcement.
- Coordinating monthly meetings of the Washington County Elder Abuse Multi-disciplinary Team.
- Identifying and coordinating educational opportunities for law enforcement, prosecutors, adult protective services, Community partners and the community-at-large on elder abuse issues and other crimes.
- Manage the Project Lifesaver radio transmitter bracelet program for seniors and people with disabilities at risk for wandering.
- Provides Gatekeeper training to employees who in their jobs, may have contact with elderly or those with disabilities in need of assistance.

PLAN & SERVICE DEVELOPMENT

**Public Hearings
Contracted Services**

SECTION C-1
PUBLIC HEARING COMMENTS

The Area Agency on Aging is required to conduct at a minimum, one public hearing on the Area Plan content, planned services, goals, objectives, etc., prior to submittal of the plan for State review and acceptance (OAA 306(a)(6). Consistent with CFR 1321.17(14) (ii) the Area Agency will submit proposals to pay for program development and coordination as a cost of supportive services, to the general public for review and comment. The AAA shall maintain documentation of public hearing notifications/discussion for the duration of the Plan. During the duration of the plan, public hearings are required if the area agency seeks to fund Title III B access, in-home or legal services below the minimum percentage. OAA 306, (a) (2) (A-C) and 306(c)

1. Please provide the following information:

City and Hearing Location: Hillsboro, Oregon
Washington Street Conference Center, 225 S. 1st Ave, Room 102,
Hillsboro
Date: 9/22/11
Number in Attendance: 13 Number of 60 y/o+:5

2. Briefly describe the information presented at the public hearing(s), and a summary of any objections related to the material presented, from those in attendance at the hearing.

The presentation included:

- An overview of the Area Plan contents including Washington County demographics and a description of WCDAYS services.
- An overview of the process involving our Strategic Plan for the next 3 years, 2012-2014

Public testimony was received and recorded.

3. Were any changes made to the plan based on the public hearing comments? No Yes

If yes, briefly describe:

SECTION C-2
CONTRACTS OF THE AREA AGENCY

Except where a waiver is granted by the State, AAA's shall award funds by grant or contracted to community services provider agencies and organizations. OAA Sec 306(a) (13) (B) and (CFR 1321.63(b)

List all contracts and funding agreements that provide services to the elderly with Older Americans Act, NSIP and OPI funds. Do not include contracts to provide services to Medicaid clients in this section.

CONTRACTOR NAME ADDRESS & CONTACT PERSON	MATRIX # SERVICE NAME
Loaves & Fishes Centers 7710 SW 31 st Avenue (PO Box 19477) Portland, OR 97280-0477 Joan Smith <input type="checkbox"/> For profit agency	7-Congregate Meals 4- Home Delivered Meals 8-Nutrition Counseling 12-Nutrition Education
Rebuilding Together 12555 4 th Street Beaverton, OR 97005 <input type="checkbox"/> For profit agency	30-1 Home Repair
Impact NW Senior GAP PO Box 33530 Portland, OR 97292 <input type="checkbox"/> For profit agency	80-5 Money Management
RSVP Washington County 14175 NW Cornell Rd Portland, OR 97229 <input type="checkbox"/> For profit agency	60-3 Reassurance
Pacific University 222 SE 8 th Ave. Suite 563 Hillsboro, OR 97123 Michel Hersen <input type="checkbox"/> For profit agency	Counseling for Veterans and Family members

CONTRACTOR NAME ADDRESS & CONTACT PERSON	MATRIX # SERVICE NAME
Marquis At Home DBA Adams & Gray Homecare Inc 4560 SE International Way, Suite 100 Milwaukie, OR 97222 Mark Schulz <input checked="" type="checkbox"/> For profit agency	1- Personal Care 2- Homemaker
Oregon Lithoprint 1315 NE Miller St. PO Box 299 McMinnville, OR 97128-8468 <input checked="" type="checkbox"/> For profit agency	70-5 Newsletter
Active For Life 448 South 1 st Street Hillsboro, OR 97123	40-5 Health & Medical Equipment
Home Instead 328 West Main, Suite B Hillsboro, OR 97123 Mike Brunt <input checked="" type="checkbox"/> For profit agency	30-5 Caregiver Respite
Misty Mountain 6950 SW Hampton St, Suite 217 Tigard, OR 97223 Greg Hasek <input type="checkbox"/> For profit agency	30-6 Caregiver Support Groups 70-2a Caregiving Counseling
Sherwood Faith in Action PO Box 1623 Sherwood, OR 97140 Mark Federspiel <input type="checkbox"/> For profit agency	10- Transportation 60-3 Reassurance 2- Homemaker 3- Chore

CONTRACTOR NAME ADDRESS & CONTACT PERSON	MATRIX # SERVICE NAME
State of Oregon 676 Church St NE Salem, OR 97301 SPD <input type="checkbox"/> For profit agency	
Zurbrugg Development 380 SE Washington St Hillsboro, OR 97123 Gene Zurbrugg <input checked="" type="checkbox"/> For profit agency	Lease
Oregon Law Center 230 NE 2 nd Avenue Suite A Hillsboro, OR 97124 Leslea Smith <input type="checkbox"/> For profit agency	11- Legal Assistance
McCann's Pharmacy 15685 SW 116 th Avenue King City, OR 97224 <input checked="" type="checkbox"/> For profit agency	40-5 Health & Medical Equipment
Oregon Dept of Consumer & Business PO Box 14480 Salem, OR 97309 Joel Ario	
Chris Larson 18685 Roundtree Dr. Oregon City, OR 97045	Consultant on our Strategic Plan

CONTRACTOR NAME ADDRESS & CONTACT PERSON	MATRIX # SERVICE NAME
North Plains Senior Center 31450 NW Commercial St. North Plains, OR 97133 <input type="checkbox"/> For profit agency	13-I&A Space for volunteers which includes computer, telephone to assist potential clients-I&R program related to CLP Grant
Loaves and Fishes Centers PO Box 19477 Portland, OR 97280-0477 <input type="checkbox"/> For profit agency	13-I&A Space for volunteers which includes computer, telephone to assist potential clients-I&R program related to CLP Grant
BNS Services LLC dba Comfort Keepers 19365 SW 65 th Avenue, #205 Tualatin, OR 97062 <input checked="" type="checkbox"/> For profit agency	1-Personal Care 2-Home Care
Asian Health & Service Center 3633 SE 35 th Place Portland, OR 97202 Christine Lau <input checked="" type="checkbox"/> For profit agency	15- Information for Caregivers 16-Caregiver Access Assistance 70-9-Caregiver Training 70-2a-Caregiver Counseling
Tuality Medical Equipment 333 SE 7 th Ave. #1200 Hillsboro, OR 97123 <input checked="" type="checkbox"/> For profit agency	40-5 Health & Medical Equipment

SERVICES PROVIDED

**Service Matrix
Oregon Project Independence**

SECTION D-1
SERVICE MATRIX

The AAA is required to provide comprehensive and coordinated community based services designed to assist older Oregonians in leading independent, meaningful and dignified lives in their own homes and communities. Examples of such services are in the *Service Definitions for Older Americans Act and Oregon Project Independence Services* as released at <http://www.dhs.state.or.us/policy/spd/transmit>.

Indicate all services provided to OAA and/or OPI clients and the method of service delivery.

	NAME OF SERVICE	UNIT DEFINITION	METHOD of SERVICE DELIVERY
CLUSTER 1 REGISTERED SERVICES			
<input checked="" type="checkbox"/> 1	Personal Care <input type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 1a	Personal Care – HCW <input type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 2	Homemaker <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 2a	Homemaker – HCW <input type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 3	Chore <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 3a	Chore – HCW <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Hour of Service	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient

<input checked="" type="checkbox"/> 4	Home Delivered Meals <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Meal Delivered	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 5	Adult Day Care/ Adult Day Health <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Hour of Service	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 6	Case Management <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour of Service	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
CLUSTER 2 REGISTERED SERVICES			
<input checked="" type="checkbox"/> 7	Congregate Meals <input checked="" type="checkbox"/> OAA	1 Eligible Meal	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 8	Nutrition Counseling <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 9	Assisted Transportation <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 One-Way Trip	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
CLUSTER 3 NON-REGISTERED SERVICES			
<input type="checkbox"/> 10	Transportation <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 One-Way Trip	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 11	Legal Assistance <input checked="" type="checkbox"/> OAA	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 12	Nutrition Education <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Session per participant	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 13	Information and Assistance <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Contact	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 14	Outreach <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Contact	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient

<input checked="" type="checkbox"/> 15	Information for Caregivers <input checked="" type="checkbox"/> OAA	1 Activity	<input checked="" type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 16	Caregiver Access Assistance <input checked="" type="checkbox"/> OAA	1 Contact	<input checked="" type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
OTHER SERVICES – ADMINISTRATIVE FUNCTIONS			
<input checked="" type="checkbox"/> 20-1	Area Plan Administration <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI		<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 20-2	AAA Advocacy <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI		<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 20-3	AAA Program Coordination & Development <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI		<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
<input type="checkbox"/>		<input type="checkbox"/> OAA <input type="checkbox"/> OPI	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
Services Which Address Functional Limitations			
<input checked="" type="checkbox"/> 30-1	Home Repair/Modification <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Activity	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 30-2	Home Health <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Home Visit	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 30-4	Respite <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Hour of Service	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 30-5	Caregiver Respite <input checked="" type="checkbox"/> OAA	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient

<input checked="" type="checkbox"/> 30-6	Caregiver Support Groups <input checked="" type="checkbox"/> OAA	1 Session per participant	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 30-7	Caregiver Supplemental Services <input checked="" type="checkbox"/> OAA	1 Activity	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
Services Which Maintain Health			
<input type="checkbox"/>	<input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Screening per participant	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 40-2	Physical Activity & Fall Prevention <input checked="" type="checkbox"/> OAA	1 Session per participant	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 40-3	Preventive Screening, Counseling & Referral <input checked="" type="checkbox"/> OAA	1 Session per participant	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 40-4	Mental Health Screening & Referral <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Hour of Service	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 40-5	Health & Medical Equipment <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Unit/Loan	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 40-6a	Medical Alert Installation <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Installation per Client	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 40-6b	Medical Alert Rental <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Payment for Service per Client	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/>	<input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Client Served	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 40-8	Registered Nurse Services <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Hour of Service	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 40-9	Medication Management <input checked="" type="checkbox"/> OAA	1 Contact	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient

Services Which Protect Elder Rights			
<input type="checkbox"/> 50-1	Guardianship Conservatorship <input type="checkbox"/> OAA	1 Contact	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 50-2	Protective Service <input type="checkbox"/> OAA	1 Contact	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 50-3	Elder Abuse Awareness & Prevention <input checked="" type="checkbox"/> OAA	1 Activity	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 50-4	Crime Prevention/Home Safety <input checked="" type="checkbox"/> OAA	1 Activity	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 50-5	LTC Ombudsman <input type="checkbox"/> OAA	1 Activity	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
Services Which Promote Socialization and Participation			
<input type="checkbox"/> 60-1	Recreation <input type="checkbox"/> OAA	1 Activity per Participant	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/>	<input type="checkbox"/> OAA	1 Visit	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 60-3	Reassurance <input checked="" type="checkbox"/> OAA	1 Contact	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 60-4	Volunteer Recruitment <input checked="" type="checkbox"/> OAA	1 Placement	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient

<input checked="" type="checkbox"/> 60-5	Interpreting/Translation <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Hour	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
Services Which Assure Access and Coordination			
<input type="checkbox"/>	<input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Hour of Service	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
<input type="checkbox"/> 70-2	Options Counseling <input checked="" type="checkbox"/> OAA	1 Hour of Service	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 70-2a	Caregiver Counseling <input checked="" type="checkbox"/> OAA	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/>	<input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Screening	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
<input type="checkbox"/> 70-4	Geriatric Assessment <input checked="" type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Assessment	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 70-5	Newsletter <input checked="" type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Newsletter Distributed	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 70-7	Placement Services <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Referral	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 70-8	Private Case Management <input type="checkbox"/> OAA <input type="checkbox"/> OPI	1 Hour	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 70-9	Caregiver Training <input checked="" type="checkbox"/> OAA	1 Session per Participant	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient

<input checked="" type="checkbox"/> 70-10	Public Outreach/Education <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Activity	<input type="checkbox"/> Contracted <input checked="" type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input checked="" type="checkbox"/> cost efficient
Services that Support Other Goals/Outcomes			
<input type="checkbox"/> 80-1	Senior Center Assistance <input type="checkbox"/> OAA	1 Center Assisted	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 80-2	Employment Assistance <input type="checkbox"/> OAA	1 Contact	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 80-3	Utility Assistance <input type="checkbox"/> OAA	1 Contact	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 80-4	Financial Assistance/Material Aid <input type="checkbox"/> OAA	1 Contact	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 80-5	Money Management <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI	1 Contact	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 80-6	Center Renovation/ Acquisition <input type="checkbox"/> OAA	1 Center Acquired or Renovated	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input type="checkbox"/> 80-7	Housing Assistance <input type="checkbox"/> OAA	1 Contact	<input type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient
<input checked="" type="checkbox"/> 90-1	Volunteer Services <input checked="" type="checkbox"/> OAA	1 Hour of Service	<input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Waiver request to self-provide <input type="checkbox"/> no provider <input type="checkbox"/> cost efficient

SECTION D-2

OREGON PROJECT INDEPENDENCE

Provide the following information about the procedures your agency (or your contractor) uses in the OPI program:

a. Describe how the agency will ensure timely response to inquiries for service.

Upon receipt of the referral:

1. The client will be contacted within 5 business days.
2. Further preliminary information will be gathered from the applicant over the phone and the sliding fee scale will be discussed.
3. Client will be added to the OPI priority list and told that they will be contacted when they are able to begin services.
4. When client is able to begin services, an assessment appointment will be set-up
5. Once eligibility is determined, Service Plans will be sent to the appropriate provider within five (5) working days after the provider has been determined.
6. After the Service Plan has been sent to a provider, the Case Manager or support staff will follow-up with the client within two (2) weeks to make sure services are in place.

b. Explain how clients will receive initial and ongoing periodic screening for other community services, including Medicaid.

OPI clients are fully assessed on an annual basis but regular check-ins (via telephone or home visits) occurs at least every 6 months. OPI/OAA staff is trained in strength based case management and options counseling and provide these services as part of their role. During these assessments or check-ins information is provided on other resources in the community. If the OPI client desires other services the OPI Case Manager will coordinate the referrals. Community Resource directories are given to each client

c. Describe how eligibility will be determined.

The determination of OPI services is based on each client's financial, functional, medical, and/or social need for the services, shown by the service eligibility level as indicated through the client assessment planning system tool (CA/PS). Service hours are determined according to the current OPI Service Level Matrix

d. Describe how the services will be provided.

The purpose of assessing clients is for the Case Manager to evaluate the current level of functioning of the individual and how well they can manage in their present living situation, then determine what care needs are required to allow the person to remain safe in the least restrictive environment. The service plan must be cost effective in management of OPI's limited resources in order to serve the greatest number of individuals with higher priority service needs.

Regular OPI Authorized Services include: Case Management, I&A, Options Counseling, Training, Counseling, Health Promotion, Homemaker, Personal Care, Respite, Contract RN, Adult Day Services, Home Repair, Chore, Money Management, Durable Medical Equipment, Home Delivered Meals, Assisted Transportation, Home Health, Medical Alert, Planning for long term care services, public education on long term care planning and resources. Many of these services are provided only as budget allows.

e. Describe the agency policy for prioritizing OPI service delivery.

Eligible clients receive authorized services on a priority basis, with the highest priorities receiving services first. The priorities will also maintain clients already receiving authorized services as long as their condition indicates. Services are to be prioritized following the OPI goals as listed in OAR 411-032-0001.

Those clients with high financial resources will be assessed lower on the priority list to receive OPI services than those with minimal financial resources. For the purpose of prioritization for services those individual clients with \$50,000 or more in resources and couples with \$75,000 or more are marked lower on the priority list. Resources include checking, savings, stocks, bonds, CDs, etc.

f. Describe the agency policy for denial, reduction or termination of services.

WCDAVS has a written policy for denial, reduction or termination of service. It states a written notice will be sent to the client of a denial, reduction or termination of services. The notice will include the reason and the client's rights to grieve the decision.

Policy for denial: Unwilling to provide information to open case; exceed service priority level; is receiving Medicaid benefits; OPI is unable to create or maintain a safe care plan.

Policy for reduction: Client reassessment indicates service needs have been reduced; notification by State of reduction of program funding.

Policy for termination: Reassessment determines client no longer meets service eligibility level; client refuses to pay fee for service; loss or reduction of program funding; inappropriate behavior in regard to treatment of care provider; moves out of service area; approved for Medicaid funding for long term care services.

g. Describe the agency policy for informing clients of their right to grieve adverse eligibility and/or service determination decisions or consumer complaints.

Clients are notified by letter that they have the right to appeal the reduction or termination of services. At that point they are entitled to another reassessment if one has not been done within the past 30 days. If the client is still found ineligible for services then they may contact the OPI supervisor or WCDAVS Director for final review and determination.

Consumer complaints are generally handled by the OPI supervisor or WCDAVS Director.

h. Explain how fees for services will be implemented, billed, collected and utilized.

Fees for service will be based on a sliding fee scale to all eligible individuals whose annual income exceeds the minimum, as established by the state. The fees start at the federal poverty level net monthly income and increase by approximately \$25 income increments up to 200% of the federal poverty level. Clients with a net income over 200% of the federal poverty level pay the full hourly rate of the services provided.

Clients who have been assessed on the sliding fee scale to have no hourly fee for service will be charged an annual \$5.00 Case Management fee.

How fees are billed and collected: In-home service contract agencies invoice the client directly for all fees for which the client is responsible. Fees are collected by contract agencies. Reimbursement amounts sought by contractors for services are reduced by fees due from clients. Fees due from clients served by Home Care Workers are invoiced and collected by WCDAVS.

How fees are utilized: All fees collected for service are used to expand and

maintain services to clients. They are utilized to maintain service hours when State allotted OPI funding is reduced.

i. Describe the agency policy for addressing client non-payment of fees, including when exceptions will be made for repayment and when fees will be waived.

OPI clients who have been assessed a fee for service will be billed monthly after Home Care Worker vouchers have been processed. If a client is more than 60 days past due the OPI voucher person, who processes client bills and payments, will notify the appropriate OPI Case Manager for follow up. The OPI Case Manager will send a letter to the client notifying them of their past due amount and informing them that the case will be closed two weeks after the date of the letter if payment arrangements are not made. If the client does not pay by the date listed then the Case Manager will discontinue the client's OPI services and send a closure letter to the client.

For clients who receive services from a contract care agency, it is the responsibility of the contract care agency to notify the OPI Case Manager of client non-payments. The same procedure as above applies.

If a client requests a payment arrangement, they may do so but must agree to pay the minimum monthly amount plus an additional \$10.00 in order to work toward paying off the debt.

Fees are generally not waived unless the client is deceased.

j. Explain how service providers will be monitored and evaluated.

1. Home Care Workers are monitored by the OPI case manager with input from contract RN, clients, family members or other interested persons. Annual survey is conducted every Fall to monitor provision of services and adequacy of care.

2. Contract Care Providers are monitored by the OPI case manager with input from contract RN (if available), clients, family members or other interested persons. Annual survey is conducted to monitor provision of services and adequacy of care. Case staffing with contract care agencies is held quarterly in which client and caregiver concerns are addressed.