



500 Summer St NE E86

Salem, OR, 97301

Voice: 800-527-5772

Fax: 503-378-8467

TTY: 711

[www.oregon.gov/OHA/HSD](http://www.oregon.gov/OHA/HSD)

**Date:** October 19, 2023

**To:** Mental Health Residential Providers  
Personal Care Attendants

**From:** Donny Jardine, Medicaid Behavioral Health Manager

**Subject:** Needs Assessment Options for Behavioral Health Services in the Home and Community

Oregon's Independent and Qualified Agent (IQA), Comagine Health, completes needs assessments and person-centered service plans for:

- 1915(i) Home and Community-Based Services (HCBS) and
- Behavioral Health Personal Care Attendant services.

When completing assessments and person-centered service plans, Comagine Health will:

- Meet face-to-face with the person to determine services and supports needs. The person can ask any other people to also attend this meeting. The meeting can be virtual or in-person.
- Offer in-person and virtual meeting options when they call to schedule the assessment.
- Maintain and submit documentation to OHA that includes whether the person being assessed chose a virtual or in-person assessment; why in-person options were not appropriate; and a plan to meet in person within the next quarter to discuss progress toward goals.

### Why is this happening?

Oregon Health Authority (OHA) requires in-person meetings to assess whether people need help with Activities of Daily Living, Instrumental Activities of Daily Living, medical complexities, or forensic needs. However, in Oregon individual choice and self-direction guide how each eligible person receives HCBS. To support individual choice throughout the program, OHA allows virtual assessments as directed by the individual being assessed.

### What should you do?

Please encourage the people you serve to tell Comagine Health whether they prefer a virtual or in-person functional needs assessment.

### Questions?

If you have any questions about this announcement, contact OHA's Medicaid team at [Medicaid.Programs@odhsoha.oregon.gov](mailto:Medicaid.Programs@odhsoha.oregon.gov)

Thank you for your continued support of Oregon's behavioral health system and the services you provide.