

Primer on the Area Plan Budget

The Area Plan Budget focuses exclusively on the funds that S&DS receives from Oregon's Department of Human Services (DHS) via the Area Plan Contract. These funds are derived from three sources: Older Americans Act, a "block grant" for the provision of public assistance services to lower income seniors and people with disabilities (including Medicaid [a.k.a., Title XIX of the Social Security Act], Food Stamps, and State General Funds), and a State in-home services program known as "Oregon Project Independence" (OPI). Information on the permitted uses of these funds is presented below.

(Note: S&DS receives and uses funds from a variety of other sources each year, including grants, contracts, fees, contributions from program participants, and donations. The agency has little decision making control over the use of most of these revenues; they must be spent for the purposes prescribed by the funding sources and/or grantors.)

Sources and Permitted Uses of Area Plan Contract Funds:

OLDER AMERICANS ACT (Federal funds):

Title III-B: Support Services and AAA Administration, including:

1. Federal Priority Services:

- Access Services: transportation, including assisted transportation (a.k.a. "escort"); outreach; information and assistance; and case management;
- In-home Services: home care; personal care; friendly visiting; telephone reassurance; chore; coordination of in-home volunteers (a.k.a. "ElderHelp"); and in-home support services (such as, respite); and
- Legal Services

2. Other allowable services: Virtually all supportive services, other than meals, are allowable under OAA Title III-B. In addition to the "federal priority services" listed above, S&DS currently spends III-B funds on: AAA Administration, Money Management, and support to the Long Term Care Ombudsman Program.

Title III-C-1: Group Meals and AAA Administration.

Title III-C-2: Home-Delivered Meals (a.k.a. “Meals on Wheels”) and AAA Administration.

Title III-D: Health promotion, disease prevention and medication management services. S&DS currently uses its Title III-D funds for medication management and Medicare Part D counseling.

Title III-E: Family Caregiver Support Services and AAA Administration. S&DS’ current plan for the use of III-E funds calls for the provision of the following services to eligible individuals and families: information, assistance, caregiver training, counseling, organization of support groups, respite, and supplemental services.

Title VII-A: Elder Abuse Prevention Services.

“TYPE B BLOCK GRANT” FUNDS (a blend of federal and State funds):

These funds are utilized for eligibility determination, benefits issuance, case management, abuse investigation/protective services, the licensure and monitoring of adult foster care homes, criminal history screening, provider placement and payment, and AAA Administration. These funds may not be used for direct services.

OREGON PROJECT INDEPENDENCE or “OPI” (State funds):

OPI can be used for the services listed below. Of these, S&DS currently funds: Home Care, Personal Care, Meals on Wheels, Case Management and AAA Administration. (Note: The 2005 Legislature passed SB 870, the OPI “modernization” act of 2005. It adds a couple of services to the list of services that can be funded with OPI funds, and it permits the provision of services to adults with physical disabilities between the ages of 19 and 59 years. As of this writing, however, administrative rules to implement these new provisions have not been promulgated and, as a result, the current rules for the program are operational.)

- Home Care
- Personal Care
- Chore Services
- Assisted Transportation/Escort Services
- Meals on Wheels

- Money Management
- Case Management
- AAA Administration

Policies regarding the Carry-over of Funds from one Fiscal Year to the Next:

S&DS' ability to carry-over funds from one fiscal year to the next varies by source. A summary of the current carry-over rules follows:

- Older Americans Act: Older Americans Act funds may be carried forward by S&DS from one fiscal year to the next.
- Type B Block Grant: S&DS has the ability to carry forward funds from the first year of the State's fiscal biennium to the second year of the biennium. However, funds unexpended at the end of the biennium cannot be carried forward by S&DS into the new biennium.
- Oregon Project Independence: See Type B Block Grant funds; the same policy applies to OPI funds.