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## MEMORANDUM

TO: Aging Services Access Points Executive Directors

FROM: Lynn C. Vidler, Senior Director, Policy and Operations, Home Care, MBA, BSW

DATE: March 26, 2024

RE: Home Care & Respite Over-Income Program Consolidation

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### Introduction:

We would like to take this opportunity to provide an update on the work for the Home Care Program Modernization effort that was released and discussed at the ASAP Executive Directors meeting on June 8, 2023. Over the past year we introduced a plan to address outdated language and concepts within the home care and identify ways to improve understanding, access, and enrollment for consumers, caregivers, ASAPs, and support systems in the Home Care Program.

The first step in the modernization process was identified as consolidation of the two Over-Income care enrollment programs:

- Respite / Over-Income (ROI)
- Home Care / Over-Income (HCOI)

The consolidation of the Over-Income programs was identified due to limitations based on the name of the programs; including, unclear delineation between the two programs and misconceptions by applicants, families, and community partners that individuals may be over income for home care. **No one is over income** for the Home Care Program and our desire is to remove any perceived barriers for enrollment.

A designated workgroup consisting of members from EOEA HC, SIMS Support, and ASAP staff (Fiscal, Home Care, Quality) was established November 2023 and has been meeting regularly

to identify, propose, address, and determine a project workplan for consolidating and rebranding the Over-Income (OI) program(s).

At this time, we are sharing the high level workplan for what to expect over the next several months:

- New consumer enrollments will cease in Respite / Over-Income (ROI) in Aging & Disability (A & D) effective April 18, 2024. Any new OI consumers will be enrolled in Home Care / Over-Income (HCOI) effective April 18, 2024
- The 2024 Financial Assessment (Eligibility Section) & Copayment Adjustment Worksheet (Consumer's Home Care Program Enrollment Section) in A & D will have removed ROI and HCOI as program options and **Home Care / Percent Based** will be the program option available
- On or around July 1, 2024, HCOI will be rebranded in A & D to the enrollment name: **Home Care / Percent Based**

With the goal to reduce the administrative work and data entry at the ASAP level, the rebranding of the Home Care / Over-Income enrollment to the **Home Care / Percent Based** enrollment will lessen the amount of consumer program enrollment transfers to be completed.

ASAP staff will be required to manually transfer existing Respite / Over-Income consumers into the new Home Care / Percent Based enrollment. We are outlining a three-month window (**July 1, 2024, to September 30, 2024**) for the manual data entry work. This should provide ample time to transfer current Respite / Over-Income consumers into the new Home Care / Percent Based enrollment.

While we are providing a three-month window from July 1, 2024, to September 30, 2024, to complete the required manual enrollment transferring of consumers from ROI to HCOI, ASAPs may expedite this process in advance of July. Considerations for transferring consumers before July 1, 2024, may be based on consumer status changes and home visit cycles (redeterminations, reassessments, or nursing visits), existing business practices, and workload capacity.

All transfers from ROI to HCOI (rebranded as Home Care / Percent Based) are expected to be completed **by September 30, 2024.**

#### **ASAP Action Steps:**

- 1) Review internal practices, procedures, workflows related to ROI and HCOI as well as timelines for transferring enrollments
- 2) Generate or develop reporting via HAR or A&D to identify ROI consumers and monthly tracking to monitor and manage transfers
- 3) Train and Inform Information & Referral, Case Management, Options Counseling, Protective Services, Family Caregiver Support, and other ASAP staff of OI change
- 4) Determine if transfers will be conducted prior to July 2024 or in the required transferred period July – September 2024

- 5) Develop ASAP specific project plan to implement transfers
- 6) Enroll new OI consumers in the Home Care / Over-Income care enrollment after April 18, 2024
- 7) Educate Case Management staff about the OI change, as they are working with consumers and their A & D records.
- 8) Respite / Over-Income (ROI) enrollment can be transferred to Home Care / Over-Income prior to July 1, 2024 if an ASAP chooses:
  - Proactively transition consumers from Respite / Over-Income to Home Care / Over-Income ahead of the July 1, 2024 date
  - Consumers will have their enrollment renamed on or around July 2, 2024 and require no additional effort by the ASAP. A definitive date for rebranding will be forthcoming
- 9) Update any internal documentation that may use the Over-Income phrasing
- 10) Identify any external facing documentation or website information that references Over Income phrasing, identify changes, and develop a plan and date to change

Our internal EOEI and external workgroup have been testing program enrollment transfers over the last few weeks. We will be monitoring the overall progress and compile best practices to release to the network in the upcoming weeks. You can anticipate additional information in advance of the July 1, 2024 targeted date.

Please refer to: **EOEI OI Consolidation Timeline 3.20.24** and **EOEI Guidance for Transferring Respite Over Income to Home Care Over Income** documents for further details and case scenario examples.

If you have any questions, please reach out to:

- Andy Grigorov ([Andy.Grigorov@mass.gov](mailto:Andy.Grigorov@mass.gov))
  - For PV reporter or invoice related questions
- Nicholas Roberts ([Nicholas.P.Roberts@mass.gov](mailto:Nicholas.P.Roberts@mass.gov))
  - For technical assistance questions
- Shannon Turner ([Shannon.K.Turner@mass.gov](mailto:Shannon.K.Turner@mass.gov))
  - For Home Care program questions
- Devon Garon ([Devon.Garon@mass.gov](mailto:Devon.Garon@mass.gov)) or Lynn Vidler ([Lynn.Vidler@mass.gov](mailto:Lynn.Vidler@mass.gov))
  - For any policy questions