

ACCESSING OTHER PUBLIC PROGRAMS AND BENEFITS POLICY		
Policy #: 02	Date of Approval: 2/2/2012	Date Policy is Effective: 2/2/12
Responsible Person: ADRC Local Manager		Author: Becky Dahl, ADRC of Eagle Country- Regional Manager
Reference: 2021 Scope of Services		Approved By: ADRC of Eagle Country Governing Board
Cross Reference:		

Purpose

The purpose of this procedure is to ensure people are linked to public programs and benefits to which they are entitled and /or eligible and interested.

Policy

This policy will describe how the Aging and Disability Resource Center (ADRC) will help customers access public programs and benefits. These conversations will be customer driven respecting personal choice in public programs and benefits.

Procedure

Protocol for Accurate Referrals for Public and Private Programs and Benefits:

When an individual contacts, or is referred to, the ADRC and appears eligible for or interested in receiving public program services or benefits, the ADRC shall refer the customer to the appropriate benefit specialist or the local, state, or federal agency responsible for determining the customer's eligibility. Programs and benefits to which a customer may be referred include, but are not limited to, Medicaid, Medicare, Social Security, SSI, SSDI, SSI-E, FoodShare, Veterans Benefits, mental health services, and other public programs and benefits.

When an individual contacts or is referred to the ADRC and appears eligible for or interested in receiving private programs and services or benefits, the ADRC shall refer the customer to the appropriate benefits specialist or the private agency responsible for determining the customer's eligibility.

Staff will be trained and become knowledgeable about all public programs and benefits to ensure referrals are appropriate for the requested program or benefit. To review eligibility criteria, staff may utilize tools such as a county specific benefits check-up, nutshell, or DRW Eligibility Checklist. ADRC resource libraries have available current brochures for public programs and benefits. When making referrals to outside agencies staff will determine the needs of the customer, evaluate appropriate resources, indicate organizations capable of meeting those needs, help callers for whom services are

unavailable by locating alternative resources, and actively assist the customer in accessing needed services.

Assistance with Medicaid Applications

The ADRC shall provide assistance to customers applying for home and community based long-term care Medicaid consistent with the requirements relating to access to publicly funded long-term care in Section III.G.3 of the scope of services.

Assistance with Medicaid applications not involving access to publicly funded long-term care shall be provided as following:

ADRCs do not have the primary responsibility for assisting with Medicaid applications. The ADRC shall provide customers who appear likely to be eligible and/or want to apply for Medicaid with basic information about how to apply for Medicaid and refer them to the appropriate agency for application assistance, eligibility determination, and enrollment.

The ADRC shall assist customers with the Medicaid application when it determines that the assistance that is available from the local or regional income maintenance agency or other sources is not timely or sufficient to ensure access. Assistance shall include one or more of the following when, and only when, the ADRC determines that its assistance is necessary:

- (a) Reviewing the customer's financial and non-financial circumstances to determine whether the customer is likely to be eligible for Medicaid.
- (b) Gathering information to support the Medicaid application, including medical and remedial expenses.
- (c) Scheduling an appointment with the income maintenance agency.
- (d) Helping the customer complete the application on-line, via telephone, or by mail.

The ADRC is not responsible for assisting with Medicaid applications for nursing home residents unless they are relocating to the community

SSI-E (Supplemental Security Income-Exceptional Expense) Eligibility Determinations:

Each office has a binder with the state manual, state provided certification documents, change reporting, approval and denial letters and a flow chart on the process. The manual provides guidance and direction on the process for consistency in the certification process across the region. It is expected that ADRC Specialist should become familiar with this manual in order to identify clients who may be eligible and provide assistance with enrollment. Moreover, the region will periodically provide SSI-E refresher training for new staff and other staff within the ADRC.

The Agreement Regarding Responsibility for Reporting Changes in SSI-E Eligibility puts the responsibility of reporting changes on the individual or responsible person. ADRC Specialist may perform initial SSI-E eligibility and certification for Family Care or IRIS enrollees. If and ADRC provides initial eligibility determinations it must inform the

Department of this in its Annual Update. Family Care, IRIS and Partnership will monitor continued eligibility and report changes. ADRC Specialists may assist reporting SSI-E changes for anyone except for Family Care, IRIS or Partnership Members.

Referrals to Mental Health and Substance Abuse Services:

The ADRC shall refer customers to appropriate county or tribal mental health and substance abuse services but shall not provide either eligibility screening on intake for these programs. The ADRC shall not administer the functional eligibility screen for mental health and AODA. ADRC offices shall develop good working relationships with mental health departments in order to facilitate smooth and efficient referrals between offices.

Referrals and Coordination Efforts with Income Maintenance Departments

ADRCs and Income Maintenance Departments will have routine meetings to address system issues to ensure people experience a timely, accurate and streamlined process for eligibility determination in public programs and benefits. These meetings are held at a minimum quarterly though monthly or weekly may be preferred. This collaborative relationship has fostered effective and efficient service for customers. ADRC Specialist will assist customers when needed in accessing the toll free number of their consortia to report changes, apply for benefits, ask questions or make an appointment.

Applications: Paper, Electronic and Other Languages

ADRC Specialists should be aware of public benefits and should then inform and assist interested individuals about how to apply. Most public benefits have paper applications, can be applied for by phone, or online at the www.access.wisconsin.gov website. Assistance is provided as needed including providing benefit information and applications in languages as found on the WI DHS website. ADRC Specialists have view only access to the CARES system which is where eligibility is determined by the Income Maintenance units. This system can be used when assisting individuals who have questions or need updates on their benefits, reviews or application status.

Assuring Clear, Concise and Accurate Documents/Referrals:

When staff are developing or reviewing documents that will be distributed to customers, they will review font and type size, readability and clarity to accommodate older adults and persons with disabilities. ADRC staff will establish rapport with the customer in order to determine the knowledge and capacities of the customer to decide how to approach the information giving service. Follow-ups will provide an opportunity to assess if information provided was clear, concise and accurate.

Processing Applications and Follow-up

If a customer chooses to fill out an application for publicly funded benefits, staff will ensure instructions are provided on next steps and assistance offered. Staff will be trained and expected to comply with the Follow-Up Policy to ensure accuracy of the referral and inquire about any additional assistance needed.

Disability and Elder Benefit Specialist Role in Referrals:

The ADRC Specialists usually have the initial appointment with customers to ensure the Disability Benefit Specialists (DBSs) and Elder Benefit Specialists (EBSs) are focusing on their specialized scope of service. However, the DBSs and EBSs also provide information and technical assistance about how to access public benefits and programs. DBSs and EBSs will be available for consulting and assistance in complicated referrals or available for providing advice and assistance in preparing and filing complaints and appeals at the local and state levels and beyond. If the DBS and EBS notice a change in eligibility for a public benefit, they will assist the customer instead of referring back to the ADRC Specialist. This seamless service delivery provides a clear and efficient customer focused approach.

Forms Used

History: Reviewed by Joint Managers 1/12, Reviewed & Approved by North Governing Board 2/12.
10/2012 ADRC Name Change: ADRC of Eagle Country; 2/17 added language about customer choice, removed resource database reference: 4/28/21 Policy updated by Regional Director with current best practices and to align and comply with the 2021 scope as well as input from all the offices
Annual Review Dates:
Reviewed by managers 3/13, changed "Elderly Benefit Specialist" to "Elder Benefit Specialist"
Reviewed by region 2/14 changes in wording only