

Specialized Recovery Services Program, Eligibility and Expedited SSI/SSDI Webinar

Ohio Department of Medicaid
Ohio Department of Mental Health and Addiction Services
Opportunities for Ohioans with Disabilities
Social Security Administration

Wednesday, October 12th 2016, 9:00am

Specialized Recovery Services Program, Eligibility and Expedited SSI/SSDI Webinar

Agenda Topic	Presenters
Introduction & Housekeeping	Kim Donica <i>Bureau of Long Term Services and Supports Ohio Department of Medicaid</i>
Medicaid Eligibility Updates	Aimee Knouff <i>County Technical Assistance and Compliance Bureau of Business Operational Support Ohio Department of Medicaid</i>
Expedited SSI/SSDI Overview	Daniel Damceski <i>Social Security Administration</i> Michelle Rinehart <i>Division of Disability Determination Opportunities for Ohioans with Disabilities</i>
Specialized Recovery Services Program	Kim Donica <i>Bureau of Long Term Services and Supports Ohio Department of Medicaid</i>

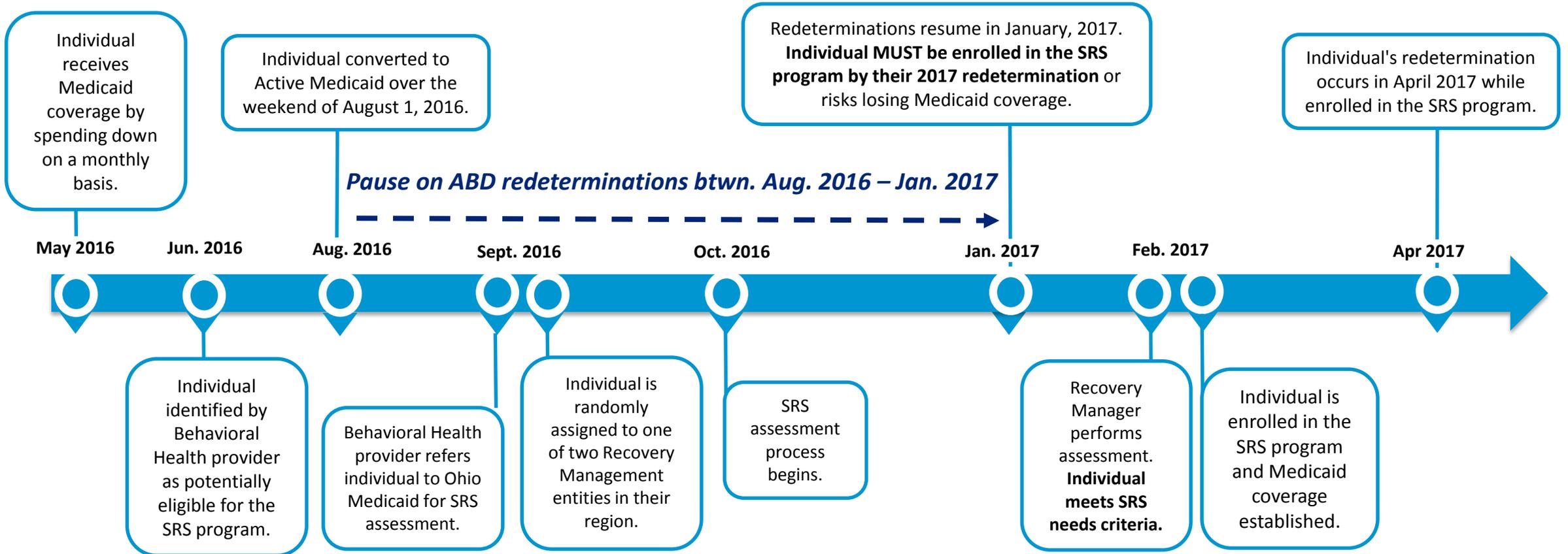
Today's Agenda

- Introductions and Housekeeping
- Eligibility Updates
- Expedited SSI/SSDI overview
- Specialized Recovery Services Program

Typical Eligibility Process for SRS Referrals

Hypothetical Client Information

- 35 years old
- Diagnosed with Schizophrenia
- Individual receives care from a Behavioral Health provider
- Individual's income is \$1,800 per month and spent down to receive Medicaid coverage prior to Aug. 2016
- Individual will require enrollment in the SRS program in order to maintain Medicaid eligibility after their redetermination in April, 2017

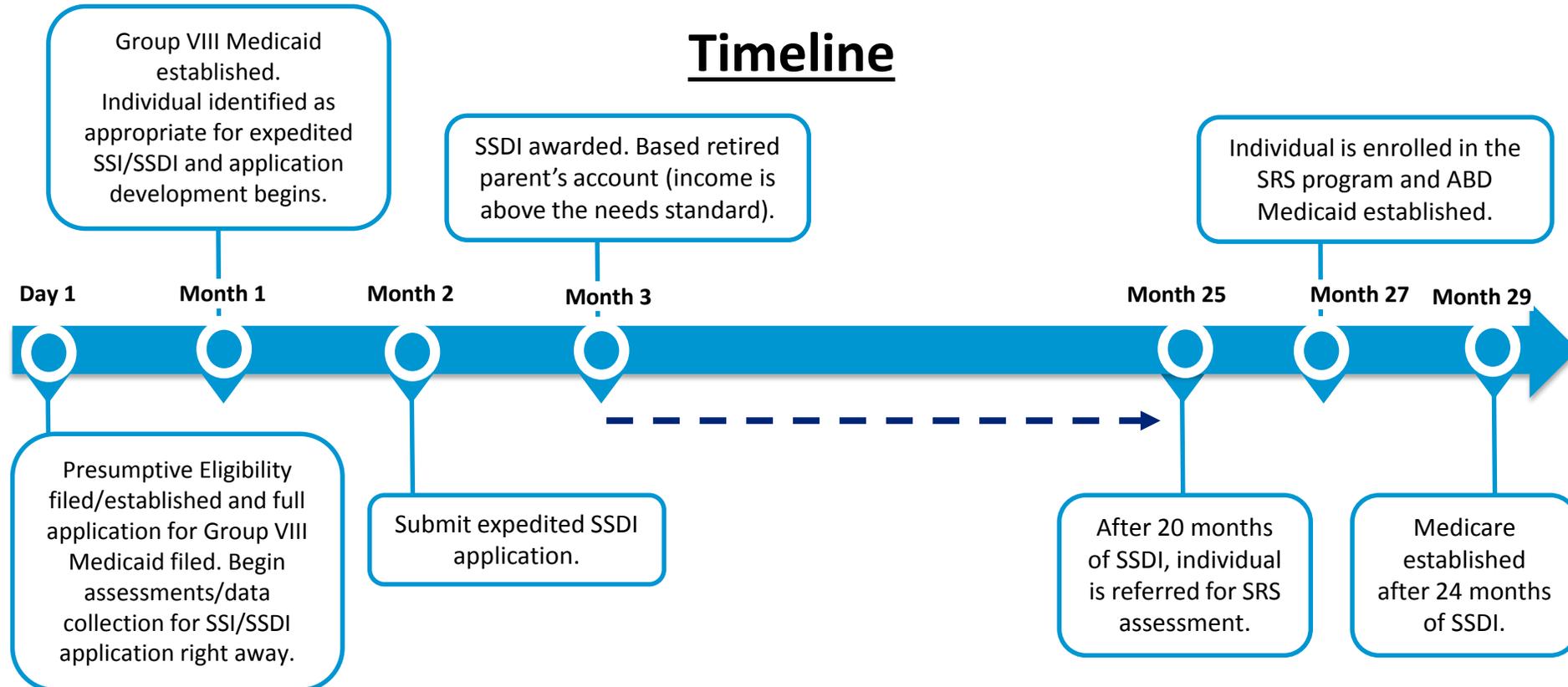


Process for Expedited SSI/SSDI & SRS Referrals

Hypothetical Client Information

- 21 years old
- Diagnosed with Schizophrenia
- Individual has needed two hospitalizations for psychiatric illness since age 19
- Individual was referred to CMH agency during 2nd hospitalization and will need active treatment
- CMH agency is an FQHC and qualified for PE applications, and is also an expedited SSI/SSDI site

Timeline



Today's Agenda

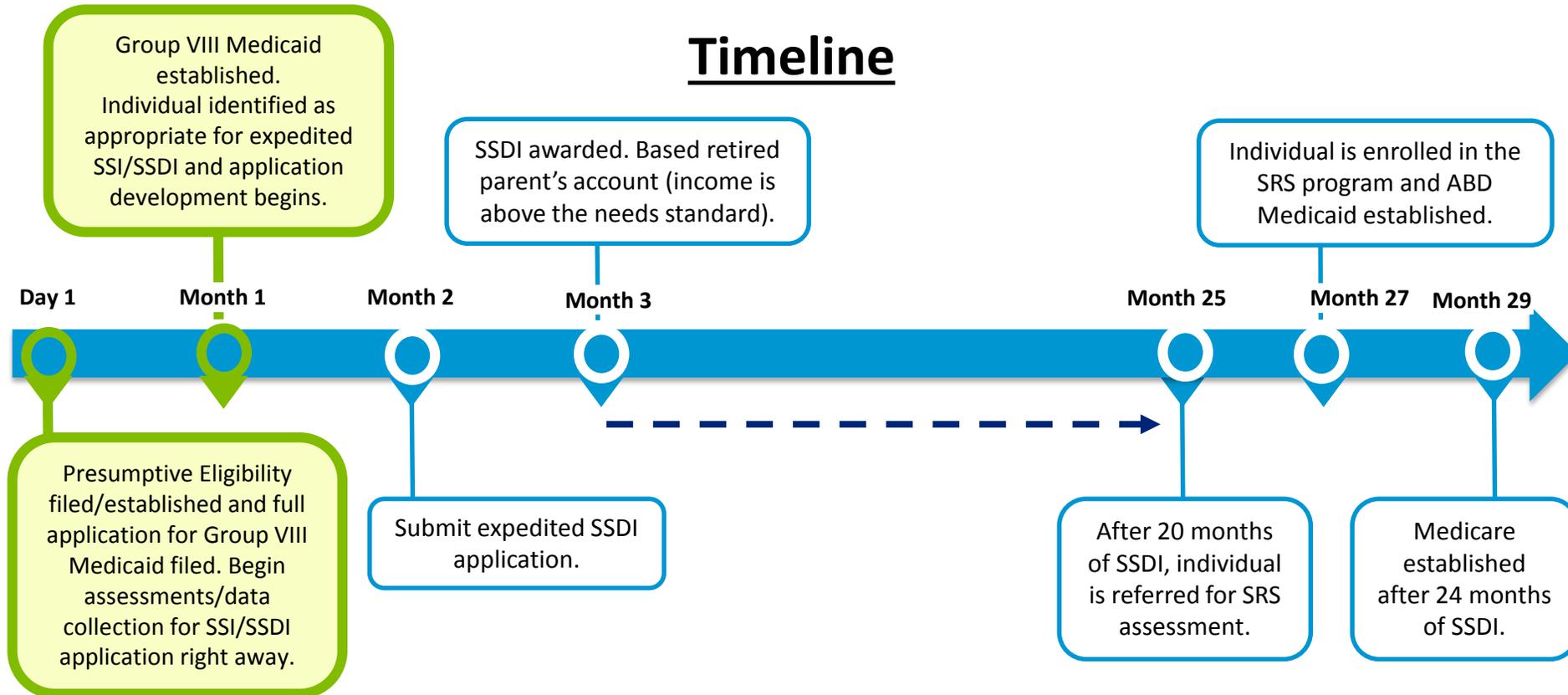
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- **Eligibility Updates**
- Expedited SSI/SSDI overview
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Timeline



History of 209(b)

- In 1972, Congress expanded the Medicaid program to cover individuals who are aged, blind, or disabled
- In the law which contained this change, section 209 says that states must provide Medicaid to anyone who received Supplemental Security Income
- Paragraph (b) of section 209 says that states could choose to be more restrictive – to have lower income or resource limits
 - » States that chose this 209(b) option are required to allow individuals to ‘Spend Down’ to the more restrictive income limit
 - » The law also put in place some restrictions around ‘incurred’ expenses for Spend Down

Prior to the 8/1/2016 Disability Determination Redesign

- MAGI categories explored first using MAGI budgeting
 - » No resource test
 - » Could be open on MAGI and in LTC facility, but not Waiver
 - » SSI individuals could be in MAGI
- ABD was explored second using ABD budgeting
 - » Deeming provisions for income and resources applied
 - spouse to spouse
 - parent to child
 - spouse to spouse and child
 - » 64% FPL (\$643/\$1,100) with ability to spend down income to become financially eligible
 - » Resource limits \$1,500/\$2,250



Disability Determination Redesign

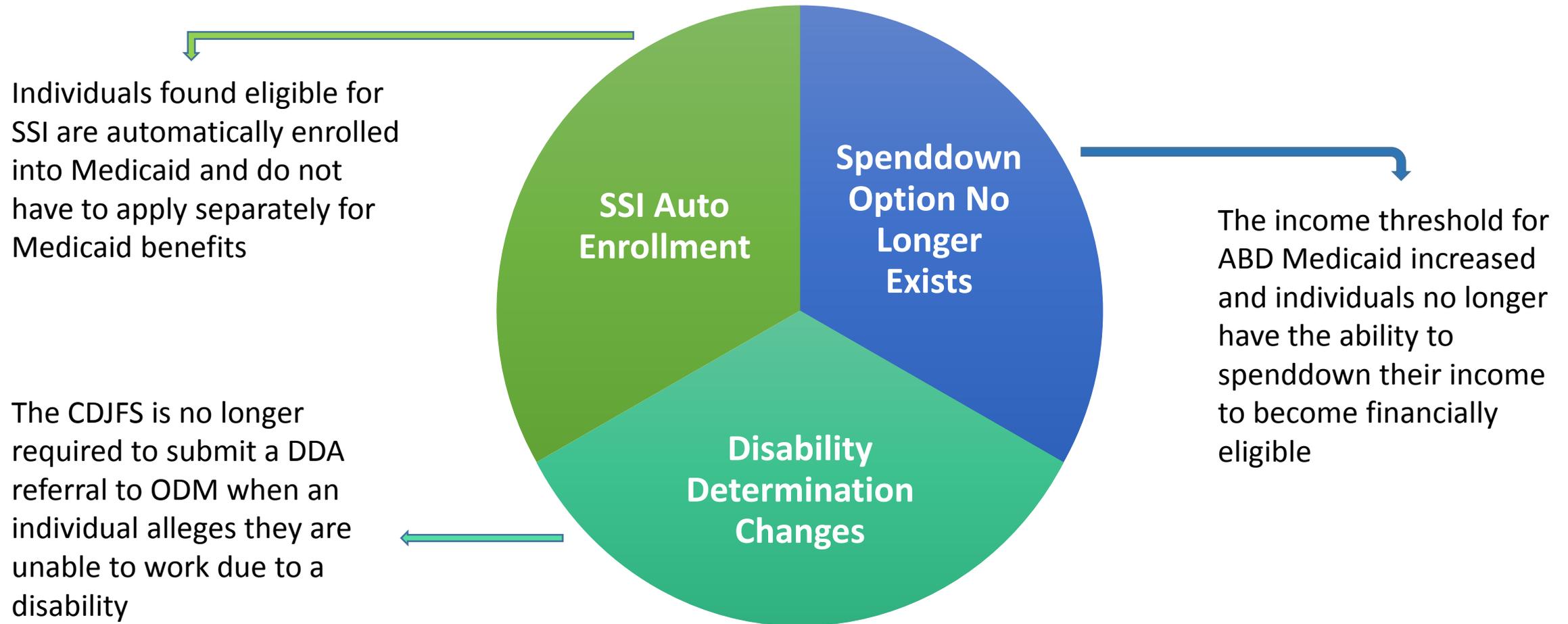
- **Under Section 1634 of the Social Security Act:**
 - » States can enter into an agreement with the federal government to use the Social Security Administration (SSA) to determine Medicaid eligibility for its aged, blind and disabled population
 - » Under 1634, individuals found eligible for Supplemental Security Income (SSI) are automatically enrolled into Medicaid and do not have to separately apply for Medicaid benefits
- **Prior to 8/1/2016 in Ohio:**
 - » Medicaid eligibility for aged, blind and disabled individuals was determined by the Ohio Department of Medicaid (ODM)
 - » Individuals applying for SSI and Medicaid had to apply separately for each program
- **Disability Determination Redesign (1634) effective 8/1/2016:**
 - » Simplifies the Medicaid eligibility determination process by eliminating the need to apply separately for SSI and Medicaid benefits
 - » Spend down option no longer exists
 - » Income and resource limits match SSI standards:

ABD Medicaid Income Limits Effective 8/1/16



	Income Limit
Individual	\$733
Couple	\$1,100

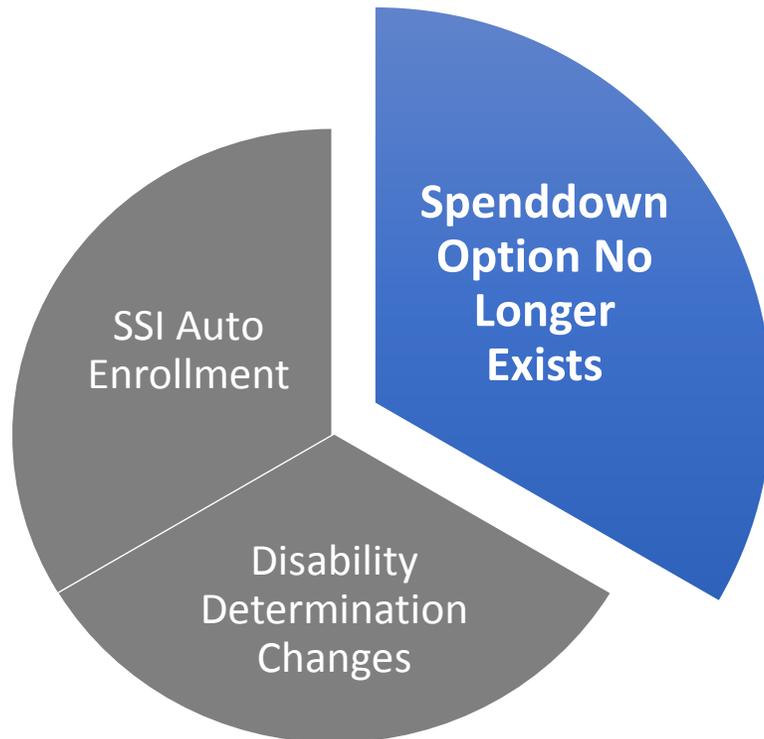
Disability Determination Redesign



Effective Dates of Medicaid Due to SSI Approval

- Application for SSI will be considered an application for Medicaid
- Eligibility should be determined for applications filed on or after August 1, 2016
- The 'payment begin date' on the SSI Income Detail Record will determine the effective date of Medicaid for the individual
- Retro eligibility can be explored
 - » If prior to 8/1/16, individual will require a separate application for Medicaid

Spenddown No Longer Exists as of 8/1/16



- Individuals exceeding the income limit will be referred to the FFM to shop for coverage
 - » Individuals eligible for Medicare may seek coverage under a Medicare supplemental insurance plan
- MBIWD will still be an option for individuals working with disabilities
- Residential State Supplement (RSS)*
- SRS will be an option for individuals with severe and persistent mental illness (SPMI)

*More information on the RSS program can be found here: <http://mha.ohio.gov/Default.aspx?tabid=201>

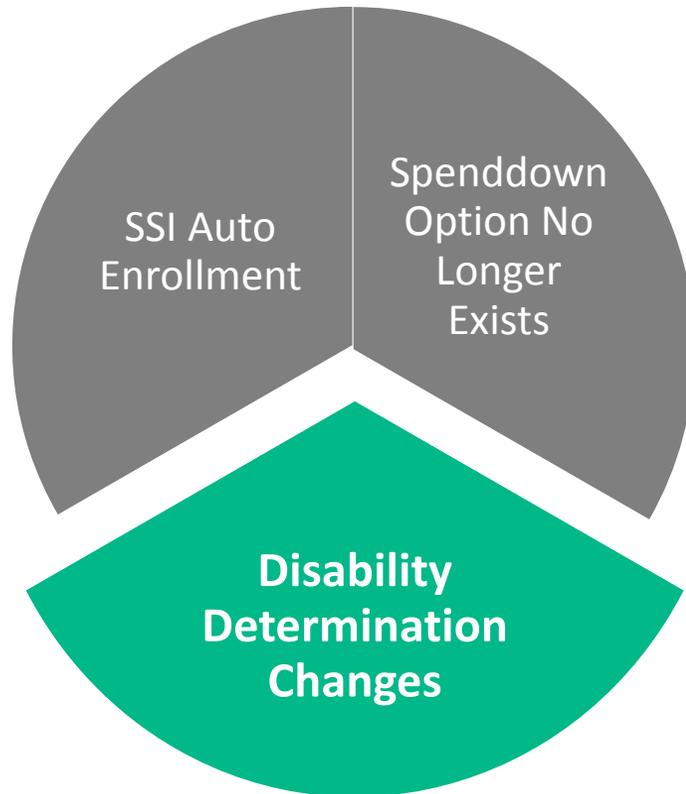
MEPL 115: Spenddown Met Retroactively After the Transition to 1634

- **Reason for Change:** To ensure continuity of health care coverage for individuals during Ohio's transition to the use of 1634 eligibility criteria, the Ohio Department of Medicaid (ODM) has granted additional months of Medicaid coverage to aged, blind, or disabled individuals who met a spenddown for any month between August 2015 and July 2016.
- **Prior Policy:** Under Section 209(b) of the Social Security Act, individuals could spenddown to become eligible for Medicaid.
- **New Policy:** When Ohio became a 1634 state on August 1, 2016, individuals no longer have the option to spenddown to become eligible for Medicaid. As stated above, to ensure continuity of coverage for individuals during the transition to 1634, ODM has granted additional months of Medicaid coverage to aged, blind, or disabled individuals who met spenddown for any month between August 2015 and July 2016, in accordance with the criteria listed in MEPL 115.
- This guidance only applies to individuals eligible for Medicaid under the aged, blind, or disabled category with a spenddown prior to August 1, 2016. If an individual submits documentation between August 1, 2016 and July 31, 2017 that he or she met spenddown for any month(s) between August 2015 and July 2016, county case workers need to determine which group listed in MEPL 115 applies to the individual's case and approve Medicaid coverage in accordance with the instructions specific to that group.

MEPL 116 - Medicaid: Deferral of Scheduled Renewals for ABD Eligibility Groups

- From August 1, 2016 through December 31, 2016, eligibility must be renewed for any aged, blind, or disabled eligibility group enrolled in Medicaid in the following situations:
 - » If there is a change in one or more of an eligibility group member's demographic factors, specifically:
 - A member of the eligibility group moves out of Ohio, born, dies, reaches a trigger age (18,65), Marital status, Level of Care
 - » If a member of an eligibility group experiences an approval, denial, or termination of Supplemental Security Income (SSI) benefits
 - » If the eligibility group reports, for the purposes of the Medicaid program, a change in one or more of a group member's:
 - Income sources or amounts that result in an increase of his or her gross monthly income by more than ten percent; or
 - Resource types or amounts that result in his or her countable resources exceeding the resource limit identified in Ohio Administrative Code rule 5160:1-3-05.1

Disability Determination Changes Effective 8/1/16



- The CDJFS is no longer required to submit a DDA referral to ODM when an individual alleges they are unable to work due to a disability
- The CDJFS is no longer required to determine if an individual has a presumptive disability
- The CDJFS is only required to submit a DDA referral to ODM when an individual is potentially eligible for one of the following:
 - » Retroactive coverage for a deceased individual
 - » AEMA
 - » MBIWD

Pre-Termination Review

- A Pre-Termination Review is simply an eligibility review.
- If an individual is no longer eligible for a category of Medicaid and termination of that category is being considered, the worker must explore eligibility for all other Medicaid categories per OAC 5160:1-2-01(I)(3)(f)(ix).
- If there is no other eligibility, then Medicaid may be terminated and the case closed, OAC 5160:1-2-01(I)(3)(d)(iv). Individuals must be given prior notice of the termination, allowed due process and hearing rights, OAC 5101:6-2-04.



Questions?



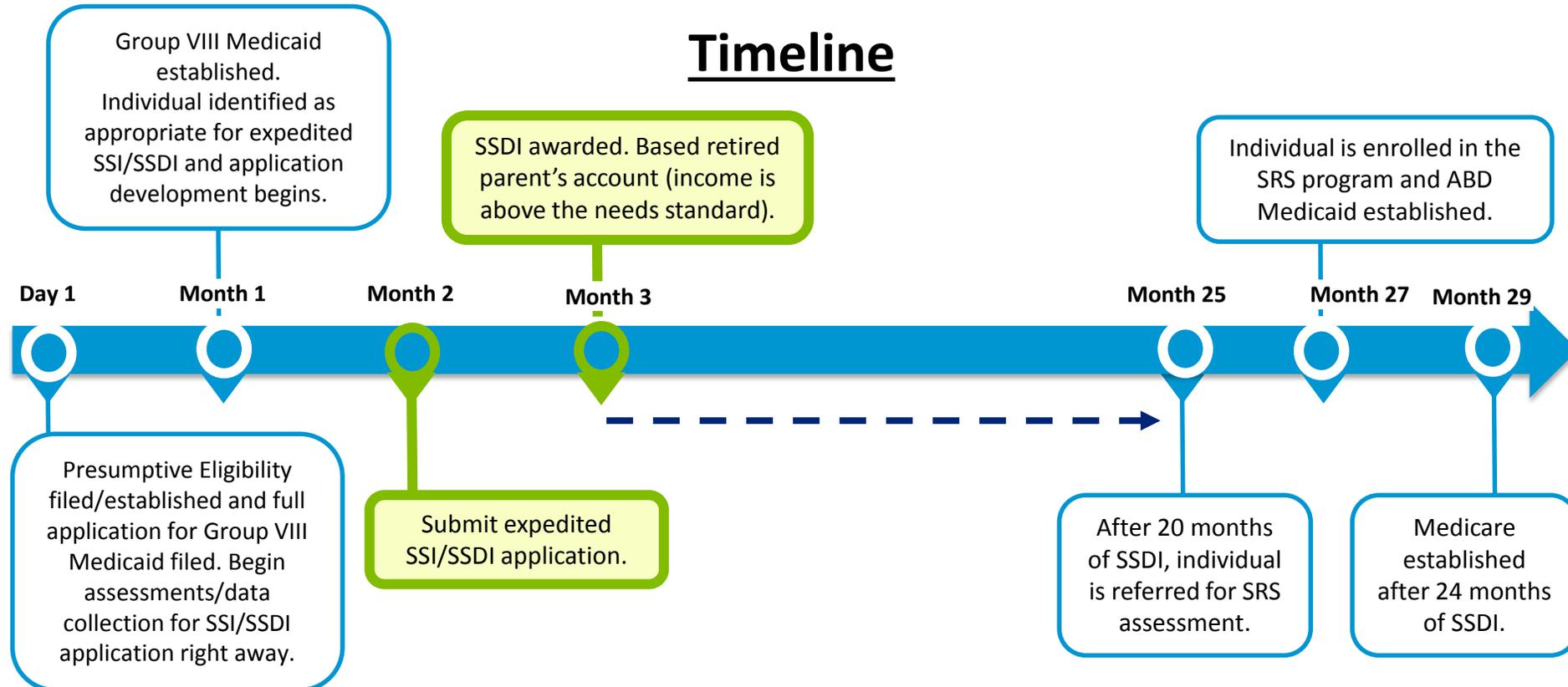
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Social Security Administration



Disability Programs

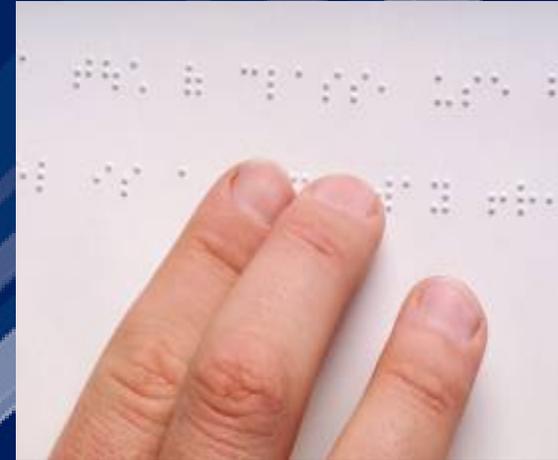
Types of Disability Programs

- Social Security benefits for workers
- Social Security benefits for adults disabled since childhood
- Supplemental Security Income (SSI) for children and adults



Disability for an Adult (Age 18 and older) Both Social Security and SSI

- Must have a physical or mental impairment (or combination of conditions)
- Inability to perform substantial work activity*
- Disability must be expected to last 12 consecutive months or result in death
- We consider age, education and past work activity



***Substantial Work:**

\$1,130 gross wages for non-blind individual

\$1,820 gross wages for blind individual

Social Security Disability Insurance

- Income & Resources do not affect eligibility
- Requires recent work
 - Age 31+ must have 20 credits in last 10 years
 - Fewer number required for younger workers
- May be retroactive up to 1 year
- Dependent benefits may be payable
- Same Benefits as for a Retired Worker
- Eligible for Medicare after 24 months
- Provisions to assist in returning to work

Work Requirements

The amount of work you need depends on your age at the time disability starts

- Before age 24
 - 1-1/2 years of work in a three-year period before becoming disabled
- Age 24-31
 - work during half the time between age 21 and the time the disability began
- Age 31 or older
 - work during five out of the 10 years before the disability began

Work Credits

- When you work and pay Social Security taxes, you earn up to a maximum of 4 work credits each year.
- The work credits are based on the total amount of your wages or self-employment income during the year.
- Each \$1,260 in earnings gives you one credit
- The amount of earnings needed to earn a work credit changes each year.



Amount of Benefit

- Benefits are calculated based on your entire work history
- If your Social Security benefit amount is lower than the full SSI payment, you may be eligible to receive both Social Security and SSI

Prevent identity theft—protect your Social Security number

Your Social Security Statement

Prepared especially for Wanda Worker

WANDA WORKER
456 ANYWHERE AVENUE
MAINTOWN, USA 11111-1111

See inside for your payment amount →

Your Estimated Benefits

You have earned enough credits to qualify for benefits. As your current earnings rate, if you stop working and start receiving benefits...
At age 62, your payment would be about \$ 1,018 a month
If you continue working until... \$ 1,476 a month
If your full retirement age (67 years), your payment would be about \$ 1,840 a month
If you have earned enough credits to qualify for benefits. If you become disabled right now, your payment would be about \$ 1,350 a month
If you get retirement or disability benefits, your spouse and children also may qualify for benefits. If you die this year, certain members of your family may qualify for the following benefits.

Your Earnings Record

Year You Worked	Your Total Social Security Earnings	Your Total Medicare Earnings
1983	560	360
1984	1,338	1,338
1985	2,312	2,312
1986	3,756	3,756
1987	5,241	5,241
1988	6,730	6,730
1989	8,674	8,674
1990	10,646	10,646
1991	12,685	12,685
1992	14,801	14,801
1993	16,994	16,994
1994	19,264	19,264
1995	21,611	21,611
1996	24,035	24,035
1997	26,537	26,537
1998	29,117	29,117
1999	31,774	31,774
2000	34,509	34,509
2001	37,323	37,323
2002	40,216	40,216
2003	43,189	43,189
2004	46,242	46,242
2005	49,375	49,375
2006	52,588	52,588
2007	55,881	55,881
2008	59,254	59,254
2009	62,707	62,707
2010	66,240	66,240
2011	69,853	69,853
2012	73,546	73,546
2013	77,319	77,319
2014	81,172	81,172
2015	85,105	85,105
2016	89,118	89,118
2017	93,211	93,211
2018	97,384	97,384
2019	101,637	101,637
2020	105,970	105,970
2021	110,383	110,383
2022	114,876	114,876
2023	119,449	119,449
2024	124,092	124,092
2025	128,805	128,805
2026	133,588	133,588
2027	138,441	138,441
2028	143,364	143,364
2029	148,357	148,357
2030	153,420	153,420
2031	158,553	158,553
2032	163,756	163,756
2033	169,029	169,029
2034	174,372	174,372
2035	179,785	179,785
2036	185,268	185,268
2037	190,821	190,821
2038	196,444	196,444
2039	202,137	202,137
2040	207,900	207,900
2041	213,733	213,733
2042	219,636	219,636
2043	225,609	225,609
2044	231,652	231,652
2045	237,765	237,765
2046	243,938	243,938
2047	250,171	250,171
2048	256,464	256,464
2049	262,817	262,817
2050	269,230	269,230
2051	275,703	275,703
2052	282,236	282,236
2053	288,829	288,829
2054	295,482	295,482
2055	302,195	302,195
2056	308,968	308,968
2057	315,801	315,801
2058	322,694	322,694
2059	329,647	329,647
2060	336,660	336,660
2061	343,733	343,733
2062	350,866	350,866
2063	358,059	358,059
2064	365,312	365,312
2065	372,625	372,625
2066	380,000	380,000
2067	387,437	387,437
2068	394,936	394,936
2069	402,497	402,497
2070	410,120	410,120
2071	417,805	417,805
2072	425,552	425,552
2073	433,361	433,361
2074	441,232	441,232
2075	449,165	449,165
2076	457,160	457,160
2077	465,217	465,217
2078	473,336	473,336
2079	481,517	481,517
2080	489,760	489,760
2081	498,065	498,065
2082	506,432	506,432
2083	514,861	514,861
2084	523,352	523,352
2085	531,905	531,905
2086	540,520	540,520
2087	549,197	549,197
2088	557,936	557,936
2089	566,737	566,737
2090	575,599	575,599
2091	584,522	584,522
2092	593,506	593,506
2093	602,551	602,551
2094	611,657	611,657
2095	620,824	620,824
2096	630,052	630,052
2097	639,341	639,341
2098	648,691	648,691
2099	658,102	658,102
2100	667,573	667,573
2101	677,104	677,104
2102	686,695	686,695
2103	696,346	696,346
2104	706,057	706,057
2105	715,828	715,828
2106	725,659	725,659
2107	735,550	735,550
2108	745,501	745,501
2109	755,512	755,512
2110	765,583	765,583
2111	775,714	775,714
2112	785,905	785,905
2113	796,156	796,156
2114	806,467	806,467
2115	816,838	816,838
2116	827,269	827,269
2117	837,760	837,760
2118	848,311	848,311
2119	858,922	858,922
2120	869,593	869,593
2121	880,324	880,324
2122	891,115	891,115
2123	901,966	901,966
2124	912,877	912,877
2125	923,848	923,848
2126	934,879	934,879
2127	945,970	945,970
2128	957,121	957,121
2129	968,332	968,332
2130	979,603	979,603
2131	990,934	990,934
2132	1,002,325	1,002,325
2133	1,013,776	1,013,776
2134	1,025,287	1,025,287
2135	1,036,858	1,036,858
2136	1,048,489	1,048,489
2137	1,060,180	1,060,180
2138	1,071,931	1,071,931
2139	1,083,742	1,083,742
2140	1,095,613	1,095,613
2141	1,107,544	1,107,544
2142	1,119,535	1,119,535
2143	1,131,586	1,131,586
2144	1,143,697	1,143,697
2145	1,155,868	1,155,868
2146	1,168,099	1,168,099
2147	1,180,390	1,180,390
2148	1,192,741	1,192,741
2149	1,205,152	1,205,152
2150	1,217,623	1,217,623
2151	1,230,154	1,230,154
2152	1,242,745	1,242,745
2153	1,255,396	1,255,396
2154	1,268,107	1,268,107
2155	1,280,878	1,280,878
2156	1,293,709	1,293,709
2157	1,306,600	1,306,600
2158	1,319,551	1,319,551
2159	1,332,562	1,332,562
2160	1,345,633	1,345,633
2161	1,358,764	1,358,764
2162	1,371,955	1,371,955
2163	1,385,206	1,385,206
2164	1,398,517	1,398,517
2165	1,411,888	1,411,888
2166	1,425,319	1,425,319
2167	1,438,810	1,438,810
2168	1,452,361	1,452,361
2169	1,465,972	1,465,972
2170	1,479,643	1,479,643
2171	1,493,374	1,493,374
2172	1,507,165	1,507,165
2173	1,521,016	1,521,016
2174	1,534,927	1,534,927
2175	1,548,898	1,548,898
2176	1,562,929	1,562,929
2177	1,577,020	1,577,020
2178	1,591,171	1,591,171
2179	1,605,382	1,605,382
2180	1,619,653	1,619,653
2181	1,633,984	1,633,984
2182	1,648,375	1,648,375
2183	1,662,826	1,662,826
2184	1,677,337	1,677,337
2185	1,691,908	1,691,908
2186	1,706,539	1,706,539
2187	1,721,230	1,721,230
2188	1,735,981	1,735,981
2189	1,750,792	1,750,792
2190	1,765,663	1,765,663
2191	1,780,594	1,780,594
2192	1,795,585	1,795,585
2193	1,810,636	1,810,636
2194	1,825,747	1,825,747
2195	1,840,918	1,840,918
2196	1,856,149	1,856,149
2197	1,871,440	1,871,440
2198	1,886,791	1,886,791
2199	1,902,202	1,902,202
2200	1,917,673	1,917,673
2201	1,933,204	1,933,204
2202	1,948,795	1,948,795
2203	1,964,446	1,964,446
2204	1,980,157	1,980,157
2205	1,995,928	1,995,928
2206	2,011,759	2,011,759
2207	2,027,650	2,027,650
2208	2,043,601	2,043,601
2209	2,059,612	2,059,612
2210	2,075,683	2,075,683
2211	2,091,814	2,091,814
2212	2,107,905	2,107,905
2213	2,124,056	2,124,056
2214	2,140,267	2,140,267
2215	2,156,538	2,156,538
2216	2,172,869	2,172,869
2217	2,189,260	2,189,260
2218	2,205,711	2,205,711
2219	2,222,222	2,222,222
2220	2,238,793	2,238,793
2221	2,255,424	2,255,424
2222	2,272,115	2,272,115
2223	2,288,866	2,288,866
2224	2,305,677	2,305,677
2225	2,322,548	2,322,548
2226	2,339,479	2,339,479
2227	2,356,470	2,356,470
2228	2,373,521	2,373,521
2229	2,390,632	2,390,632
2230	2,407,803	2,407,803
2231	2,425,034	2,425,034
2232	2,442,325	2,442,325
2233	2,459,676	2,459,676
2234	2,477,087	2,477,087
2235	2,494,558	2,494,558
2236	2,512,089	2,512,089
2237	2,529,680	2,529,680
2238	2,547,331	2,547,331
2239	2,565,042	2,565,042
2240	2,582,813	2,582,813
2241	2,600,644	2,600,644
2242	2,618,535	2,618,535
2243	2,636,486	2,636,486
2244	2,654,497	2,654,497
2245	2,672,568	2,672,568
2246	2,690,699	2,690,699
2247	2,708,890	2,708,890
2248	2,727,141	2,727,141
2249	2,745,452	2,745,452
2250	2,763,823	2,763,823
2251	2,782,254	2,782,254
2252	2,800,745	2,800,745
2253	2,819,296	2,819,296
2254	2,837,907	2,837,907
2255	2,856,578	2,856,578
2256	2,875,309	2,875,309
2257	2,894,090	2,894,090
2258	2,912,931	2,912,931
2259	2,931,832	2,931,832
2260	2,950,793	2,950,793
2261	2,969,814	2,969,814
2262	2,988,895	2,988,895
2263	3,008,036	3,008,036
2264	3,027,237	3,027,237
2265	3,046,498	3,046,498
2266	3,065,819	3,065,819
2267	3,085,190	3,085,190
2268	3,104,621	3,104,621
2269	3,124,112	3,124,112
2270	3,143,663	3,143,663
2271	3,163,274	3,163,274
2272	3,182,945	3,182,945
2273	3,202,676	3,202,676
2274	3,222,467	3,222,467
2275	3,242,318	3,242,318
2276	3,262,229	3,262,229
2277	3,282,190	3,282,190
2278	3,302,211	3,302,211
2279	3,322,292	3,322,292
2280	3,342,433	3,342,433
2281	3,362,534	3,362,534
2282	3,382,695	3,382,695
2283	3,402,916	3,402,916
2284	3,423,197	3,423,197
2285	3,443,538	3,443,538
2286	3,463,939	3,463,939
2287	3,484,390	3,484,390
2288	3,504,891	3,504,891
2289	3,525,442	3,525,442
2290	3	

Social Security Benefits for Adults Disabled Since Childhood



Benefits can be paid on the record of a disabled, retired or deceased parent to an unmarried child of any age if the child became disabled before the age of 22

Supplemental Security Income (SSI)

Who Can Get SSI?

People with limited income and resources who are:

- blind, at any age; or
- disabled, at any age; or
- age 65 or older

SSI Benefits for Adults

- Resource limits
 - \$2,000 for individual
 - \$3,000 for couple
- We count
 - bank accounts (CDs, IRAs)
 - second car
 - stocks and bonds, 401Ks
 - liquid assets
 - property other than where you live



SSI Benefits for Adults

- We don't count as resources
 - home in which you live
 - first car
 - burial plots
 - some resources set aside for burial



How to Apply for Disability Benefits – Expedited Process

Apply for Social Security Disability (SSDI)
online at:
www.socialsecurity.gov/applyfordisability

and

Apply for Supplemental Security Income (SSI) by
completing paper form SSA-8000

Submitting information to SSA

- Submit paper packet same day you submit electronic applications/reports with Cover Sheet:
 - SSA-8019 (3rd Party Liability Statement)
 - SSA-827 (if paper) (Medical Release Form)
 - SSA-1696 (Appointment of Representative)

If applicant is not capable of handling their finances:

- SSA-787 (Physician Statement)
- SSA-11 (Representative Payee Form)

If The Claim Is Allowed

We will send the client an award notice that explains

- When their benefits start and their monthly benefit amount
- Information beneficiaries need to report to us
(Examples: work activity, medical improvement)
- When their case will be reviewed
- What to do if they have any questions
- Appointed Representative will receive copies of all notices

If The Claim Is Denied

- The client will get a letter explaining our decision
- The client may appeal the decision within 60 days after they receive our notice
- They will need to update information that has changed

Internet Appeals

If the clients application was denied for medical reasons, they can request an appeal of the decision on the Internet



How to Request an Appeal Online

Go to www.socialsecurity.gov/disability/appeal

Complete and submit these forms online:

- The appeal form mentioned in the decision letter you received
- An Appeal Disability Report (Form i3441)

The client also will need to print, sign and mail us a new Authorization to Disclose Information (Form SSA-827).

my Social Security

Your Online Account ... Your Control ...
www.socialsecurity.gov/myaccount



***my* Social Security is an easy-to-access, easy-to-use portal to view and update some of your own Social Security information.**

my Social Security Services

If you don't get benefits, you can—

- **View, save, and print your online *Social Security Statement*.**

If you do get benefits you can—

- **Get your benefit verification letter;**
- **Check your benefit and payment information and your earnings record;**
- **Change your address and phone number; and**
- **Start or change your direct deposit.**

Thank you



www.socialsecurity.gov

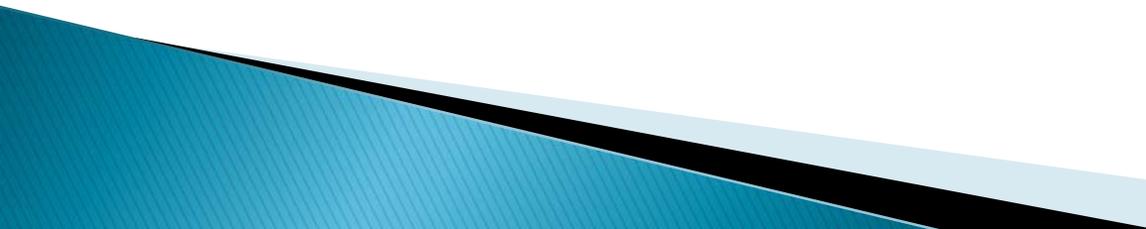
Opportunities for Ohioans with Disabilities

**Division of Disability Determination
Unit 7D Homeless/Special Projects/
Pre-Release Unit**

DDS vs. DDD

- ▶ **DDS: Disability Determination Service**
 - General name for the agency that processes Social Security disability claims for a particular state
 - What the Social Security Administration calls us
- ▶ **DDD: Division of Disability Determination**
 - The state agency that processes Social Security disability claims for the State of Ohio
 - What this agency calls itself

Application Has Been Submitted to FO and Is Now at DDD

- ▶ DDD Case Control Department receipts the claim in and notes any special flags.
 - ▶ 7D Homeless / Special Projects Supervisor monitors the queues
 - ▶ Claim is assigned to an adjudicator in the homeless unit
- 

The Journey of a Claim: Adjudicator Duties

- ▶ The adjudicator sends requests for medical evidence of record (MER) to the relevant sources of information listed on the application.
 - ▶ May determine a consultative examination is needed.
 - ▶ The adjudicative team (adjudicators, medical consultants and Disability Claims Specialists) analyzes all available evidence
- 

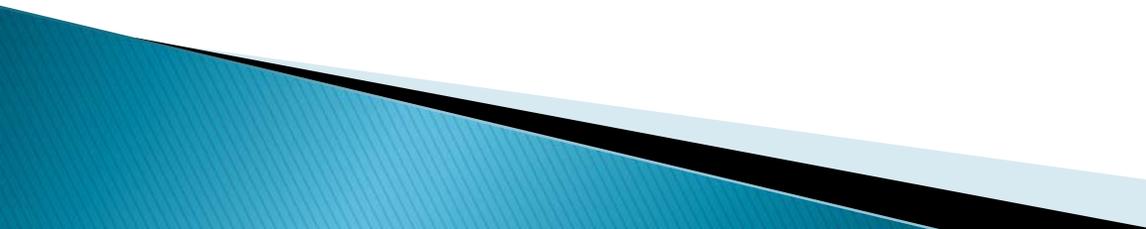
The Journey of a Claim: Adjudicator Duties

- ▶ The adjudicative team determines if the claimant has severe and marked limitations that meet SSA disability guidelines or that prevent all work related activities (using Sequential Evaluation).
- ▶ Final decision
 - Claim typically returned to Field Office and claimant notified of the decision.
 - Claim can be randomly chosen for review by SSA's quality assurance department. If they disagree with the DDS's decision they will return the claim for additional actions.

Definition of Disability

The inability to engage in Substantial Gainful Activity (i.e. work), due to a Medically Determinable Impairment (mental and/or physical), that is expected to or has lasted 12 full months or is expected to result in death.

5 Steps of Sequential Evaluation

- ▶ Is the claimant engaging in Substantial Gainful Activity (SGA)?
 - ▶ Does the claimant have a severe impairment?
 - ▶ Does the impairment meet or equal the listings?
 - If no, determine the claimant's residual functioning capacity (Physical – RFC) and (Psychological – MRFC)
 - ▶ Does the impairment prevent past work?
 - ▶ Does the impairment prevent other work?
- 

Physical Listings

- ▶ 1.00 Musculoskeletal System
- ▶ 2.00 Special Senses and Speech
- ▶ 3.00 Respiratory System
- ▶ 4.00 Cardiovascular System
- ▶ 5.00 Digestive System
- ▶ 6.00 Genitourinary Disorder
- ▶ 7.00 Hematological Disorders
- ▶ 8.00 Skin Disorders
- ▶ 9.00 Endocrine Disorders
- ▶ 10.00 Congenital Disorders that Affect Multiple Body Systems
- ▶ 11.00 Neurological
- ▶ 12.00 Cancer
- ▶ 13.00 Immune System Disorders

MENTAL LISTINGS

- ▶ 12.02 Organic Mental Disorders
- ▶ 12.03 Schizophrenic, Paranoid and Other Psychotic Disorders
- ▶ 12.04 Affective Disorders
- ▶ 12.05 Intellectual Disability
- ▶ 12.06 Anxiety-Related Disorders
- ▶ 12.07 Somatoform Disorders
- ▶ 12.08 Personality Disorders
- ▶ 12.09 Substance Addiction Disorders
- ▶ 12.10 Autistic Disorder and other Pervasive Developmental Disorders

Website for listings: <http://www.ssa.gov/disability/professionals/bluebook/>

The Role of Health Professionals

- ▶ Completing questionnaires from DDD and/or sending medical records
 - ▶ Giving descriptive information about functioning and response to treatment
 - ▶ While only certain treating sources are considered **acceptable medical sources** for decision making, all medical information is extremely valuable to the claim
- 

Acceptable Medical Sources

Psychiatrists



Doctors (MD/DO)



Psychologists (PhD or PsyD)

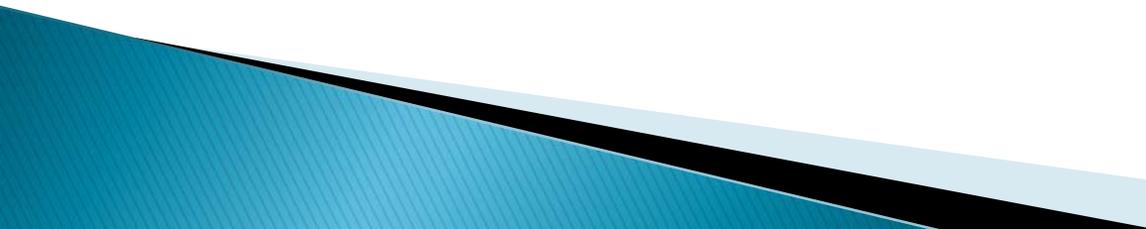
School Psychologists for Intellectual Disabilities
and Other Learning Disorders

Other Good Sources of Information

- ▶ MH Counselors/Therapists
- ▶ Social Workers
- ▶ Case Managers
- ▶ Hospitals/Clinics
- ▶ Rehabilitation Centers
- ▶ Schools



What Information Are We Looking For?

- ▶ Dates of treatment
 - ▶ Diagnosis and capability statement
 - ▶ Testing/Imagery results
 - ▶ Operative/Pathology reports
 - ▶ Office notes
 - ▶ Mental Status Exams
 - ▶ IP/ER records
 - ▶ Any available psychological testing
 - ▶ Description of functional limitations due to symptoms
- 

Things We May Need From the Claimant and/or Representative

- ▶ Attend a consultative examination
 - ▶ Contact sources for assistance in obtaining records
 - ▶ Forms
 - MHAS Forms
 - Work History Form
 - SSA-827 (Medical Release)
- 

Other Issues

- ▶ Please be sure to include **all** allegations on the claimant's application.
- ▶ If supplying records, be sure to include the entire record for the relevant time period
 - As a general rule, for SSDI we request records one year prior to alleged onset date (i.e. the date the clmt stopped working. For SSI, we will typically request records one year prior to application date.

Other Issues (cont.)

- ▶ A diagnosis does not equal disability. We are a function based program and it is the severe limitations in functioning that lead to a finding of disability.
 - Example: diabetes controlled with medication
- ▶ Prior allowances – just because a claimant was allowed in the past does not necessarily mean s/he will be allowed again. Many factors could change the outcome.
 - Examples: change in listings, change in age, severity of the condition and its limitations in functioning have changed, technical denials

Unit 7D

Homeless/Special Projects/Pre-Release Claims

- ▶ Michelle Rinehart, Unit Supervisor
 - code: **MRM718**, phone: 614-438-1685
- ▶ Charla Henry, Disability Claims Adjudicator 3
 - code: **CLB226**, phone: 614-438-1340
- ▶ Shannon Hopp, Disability Claims Adjudicator 3
 - code: **SLH235**, phone: 614-438-1629
- ▶ Margie Johnson, Disability Claims Adjudicator 2
 - code: **MAJ252**, phone: 614-438-1731
- ▶ Jamie Labuda, Disability Claims Adjudicator 3
 - code: **JLR626**, phone: 614-438-1852

Unit 7D

Homeless/Special Projects/Pre-Release Claims

- ▶ Adam Myers, Disability Claims Adjudicator 3
 - code: **ALM117** phone: 614-438-1649

- ▶ Jennifer Nelson, Disability Claims Adjudicator 3
 - code: **JRE836**, phone: 614-438-1573

- ▶ Mary Vitek, Disability Claims Adjudicator 3
 - code: **MAV370**, phone: 614-433-8286

- ▶ Gina Fleming, Disability Claims Adjudicator 3
 - code: **GMF822** phone: 614-438-1659

- ▶ Mary Roederer, Disability Claims Adjudicator 3
 - code: **MER674**, phone: 614-438-1848

Other Useful Resources

- ▶ Resources for Third Parties

<http://www.ssa.gov/thirdparties.htm>

- ▶ Social Security Disability

<http://www.socialsecurity.gov/disability>

Other Useful Resources

- ▶ Department of Mental Health and Addiction Services
Expedited SSI Program

Please register with Department of Mental Health and Addiction Services if interested in the program by contacting expeditedssi@mha.ohio.gov.

Additional training from the Department of Mental Health and Addiction Services will be provided. Updated webpage coming soon.

Questions?



Today's Agenda

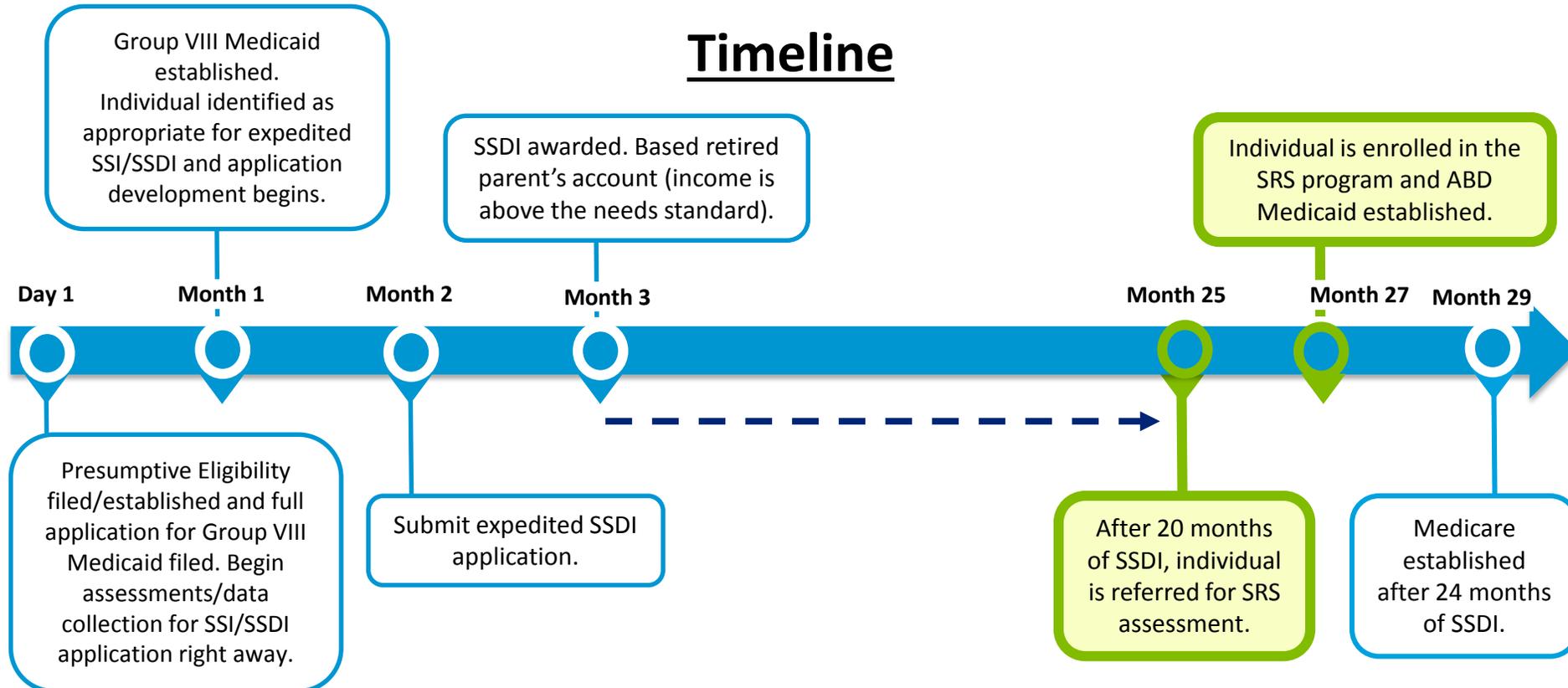
- Introduction – Timeline
- Eligibility Updates
- Expedited SSI/SSDI overview
- **Specialized Recovery Services Program**

Process for Expedited SSI/SSDI & SRS Referrals

Hypothetical Client Information

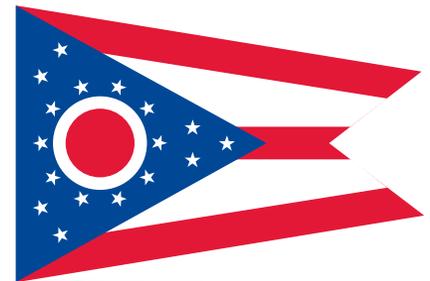
- 21 years old
- Diagnosed with Schizophrenia
- Individual has needed two hospitalizations for psychiatric illness since age 19
- Individual was referred to CMH agency during 2nd hospitalization and will need active treatment
- CMH agency is an FQHC and qualified for PE applications, and is also an expedited SSI/SSDI site

Timeline



Specialized Recovery Services Program

**MAKING
OHIO
BETTER**



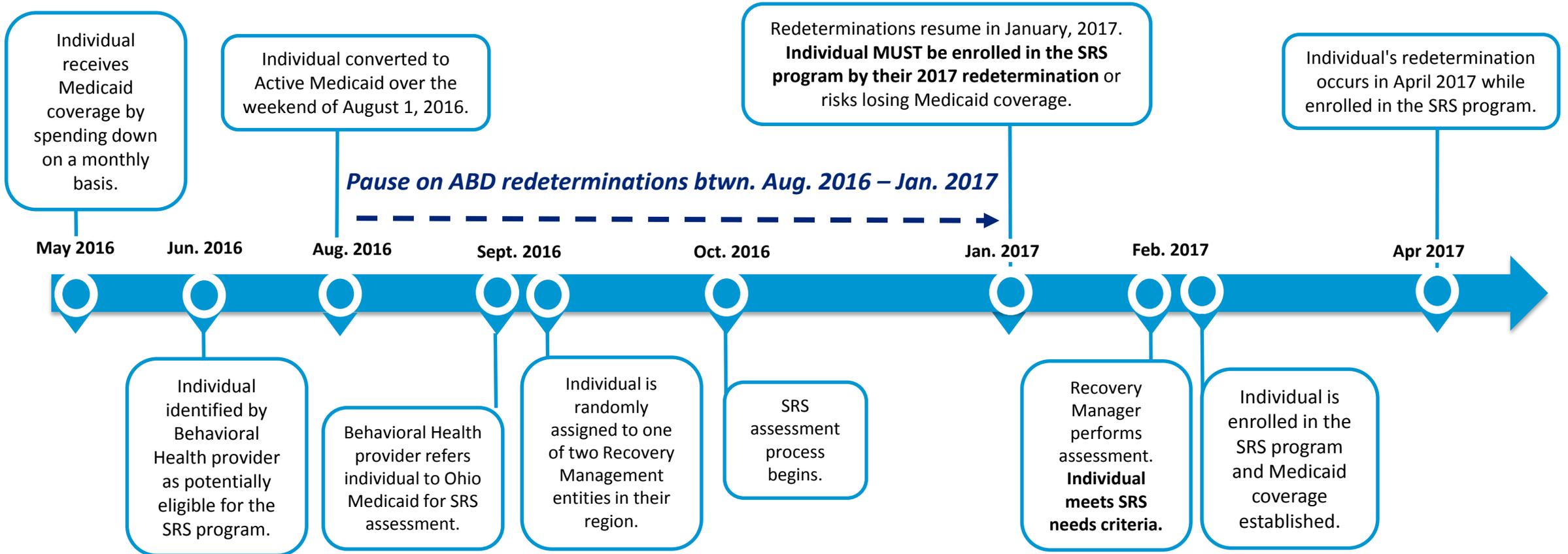
SRS Program Individual Eligibility and Program Enrollment

OAC 5160-43-02

Typical Eligibility Process for SRS Referrals

Hypothetical Client Information

- 35 years old
- Diagnosed with Schizophrenia
- Individual receives care from a Behavioral Health provider
- Individual's income is \$1,800 per month and spent down to receive Medicaid coverage prior to Aug. 2016
- Individual will require enrollment in the SRS program in order to maintain Medicaid eligibility after their redetermination in April, 2017



Specialized Recovery Services Program

To be eligible for enrollment an individual must meet all the criteria listed on slides 70-73.

This includes:

- » Be at least 21 years of age
- » Be determined financially eligible for Medicaid
- » Receive Social Security Disability Benefits

Specialized Recovery Services Program

To be eligible for enrollment an individual must:

- » Be diagnosed with a severe and persistent mental illness as set forth in the attachment to rule 5160-43-02 of the OAC
- » Score at least a 2 in one of the items in the “mental health needs” or “risk behaviors” section or score a 3 on at least one of the items in “life domains section” of the ANSA
- » Demonstrate needs related to the management of the behavioral health condition

Specialized Recovery Services Program

To be eligible for enrollment an individual must:

- » Have at least one of the following risk factors prior to enrollment:
 - One or more psychiatric inpatient admissions at an inpatient psychiatric hospital; or
 - A discharge from a correctional facility with a history of inpatient or outpatient behavioral health treatment while residing in that facility; or
 - Two or more emergency department visits with a psychiatric diagnosis; or
 - A history of treatment in an intensive outpatient rehab program for greater than ninety days.

Specialized Recovery Services Program

To be eligible for enrollment an individual must:

- » Reside in an HCBS setting
- » Demonstrate a need for SRS, and not otherwise receive those services
- » Have needs that can be safely met in a HCBS setting
- » Participate in the development of a person-centered care plan

Specialized Recovery Services Program

To be eligible for enrollment an individual must:

» Meet at least one of the following:

- Have a need for a SRS to maintain stability, improve functioning, prevent relapse, be maintained in the community and if not for the provision of the SRS the individual would decline to a prior level of need; or
- Previously have met the eligibility criteria and but for the provision of the SRS, would decline to a prior level of need

Specialized Recovery Services Program

Listed below is the explanation of how identification and outreach occurs for individuals impacted by the SRS Program

Identification

- ODM identifies potentially eligible individuals **OR** Behavioral health providers refer potentially eligible individuals to ODM
- Individuals cannot be enrolled in both the SRS program and a 1915 (c) waiver

Communications

- Individual receives SRS program “educational” letter from ODM
- Individual’s primary behavioral health provider notified of potential eligibility

Recovery Manager Outreach

- Individual randomly assigned to 1 of 2 Independent Entities(IE) in their region
- Individual can select the other (IE) if they so choose

Ongoing Identification and Outreach

Specialized Recovery Services Program

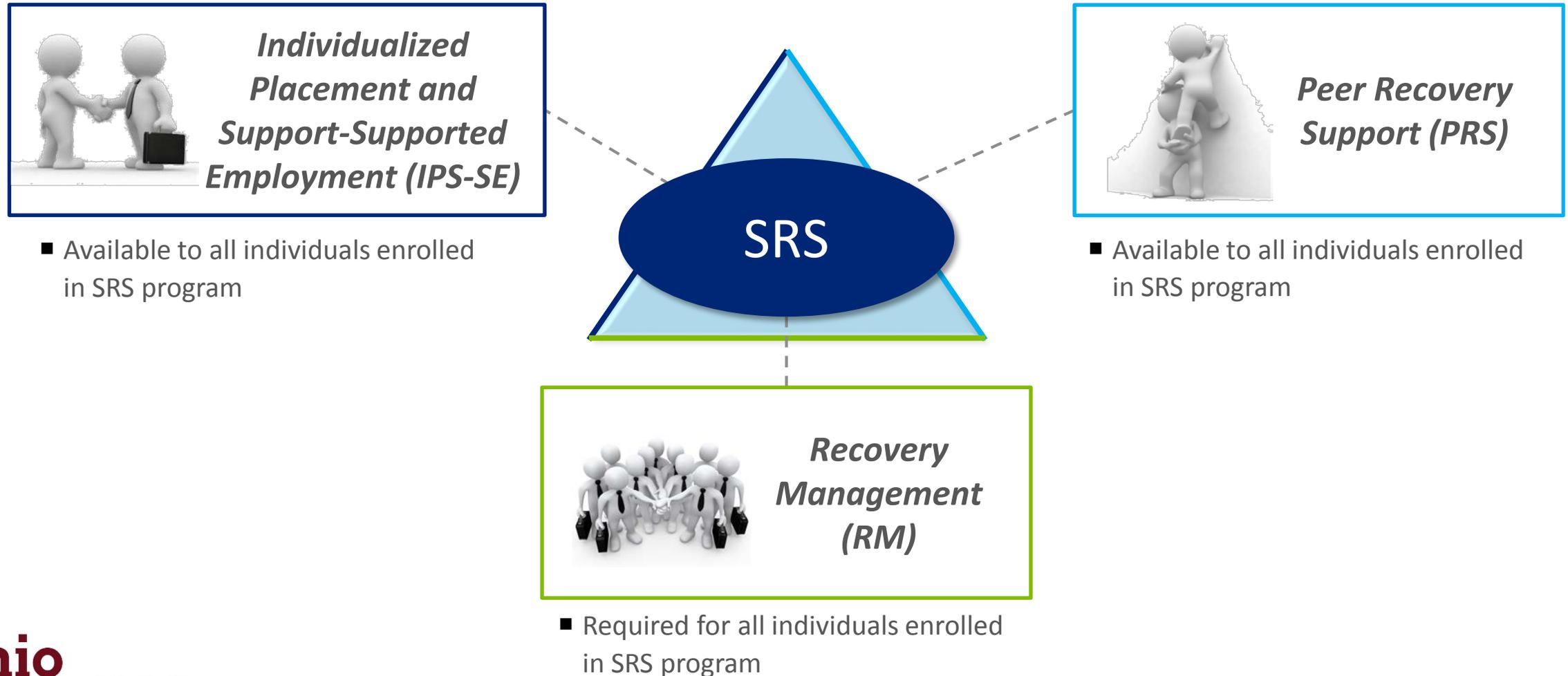
Once IE selection is finalized:

- » IE assigns a Recovery Manager to the potentially eligible individual
- » Recovery Manger performs the following functions:
 - Schedules a face-to-face visit
 - Completes ANSA
 - Assesses living arrangements for HCBS settings requirements
 - Gathers information and clinical documentation
 - Develops preliminary service plan

SRS Program Covered Services and Provider Requirements

OAC 5160-43-04

Specialized Recovery Services Program



Specialized Recovery Services Program

Procedure Code for IPS-SE

- H2023-Initial Visit
- H2025-Ongoing Visits

Billing and Certification Information

- Billed in 15 minute units
- IPS-SE providers are certified by the Ohio Department of Mental Health and Addiction Services under provider type 84.



Specialized Recovery Services Program

Procedure Code for PRS

- H0038

Billing and Certification Information

- Billed in 15 minute units
- Peer Recovery Support providers are certified by the Ohio Department of Mental Health and Addiction Services under provider type 84.



Specialized Recovery Services Program

Recovery management activities include:

» Face-to-face eligibility evaluation, including:

- Administration of the ANSA;
- Verification of the individual's residence in a home and community-based setting as described in rule 5160-44-01 of the OAC,
- Verification of the individual's qualifying SPMI diagnoses as described in the appendix to rule 5160-43-02 of the OAC; and
- Evaluation of all other eligibility criteria as described in paragraph (A) of rule 5160-43-02 of the OAC.



Specialized Recovery Services Program

Recovery management activities (Cont'd) include

- » Person-centered care planning, monitoring and updating the care plan, as described in rule 5160-44-02 of the OAC.
- » Facilitation of community transition for individuals who receive Medicaid-funded institutional services. Cannot duplicate, institutional and managed care plan discharge planning and other community transition programs. May be provided up to 180 days prior to institutional discharge.



Specialized Recovery Services Program

Procedure Code for RM

- T1016

Billing and Certification Information

- Billed in 15 minute increments
- Recovery Management providers are selectively contracted with ODM. They will submit claims under provider type 45.



Supporting Individuals to Enroll

Supporting Individuals to Enroll

During the week of May 9th 2016, the Ohio Department of Medicaid began contacting potentially eligible individuals to provide information on the SRS program and their assigned recovery management agency. **Be prepared to assist with the enrollment process by** identifying individuals likely to be eligible for SRS and ensuring that they are connected to a recovery manager.

If you believe an individual may be eligible for the SRS program, but that person has not been contacted, please contact the Ohio Department of Medicaid via secure email at BHCP@medicaid.ohio.gov, subject line: *SRS Program Referrals*. A referral template can be found [here](#).

You are encouraged to prioritize referrals based on the criteria below. Please **only** refer individuals who:

- Are 21 or older;
- Are diagnosed with a serious and persistent mental illness as listed in the [appendix](#) of Rule 5160-43-02; and
- Have received Medicaid through spenddown at least once in the period between August 2015 – July 2016 (indicating the most recent month in which the client met spend down).

Ohio Medicaid will connect the person to a recovery manager to begin program enrollment.

More information on the SRS referral process can be found in the [May 23rd issue of MITS Bits](#).



Supporting Individuals to Enroll

It is important to note that although changes to Ohio's disability determination process took place in August of 2016, **individuals who spent down at least once in the period between August 2015 – July 2016 did not lose their Medicaid benefit at that time.**

Waiver of ABD renewals.

Ohio Medicaid has deferred ABD renewals between August 2016 – December 2016 to ensure that every current beneficiary who is potentially impacted has time to transition to other sources of coverage, including the SRS program (if eligible). An individual's assigned recovery manager will be informed of their eligibility renewal date in order to help them through the process.

Medicaid eligibility renewals will resume in 2017.

Beginning in January, 2017, the new eligibility criteria will apply to individuals seeking Medicaid ABD renewals in Ohio.

Enroll Early.

However, individuals who may be eligible for the SRS program are encouraged to enroll prior to their next redetermination date, as specialized recovery services are now available.



Supporting Individuals to Enroll

Educational Resources

The Ohio Departments of Medicaid and Mental Health and Addiction Services have developed a number of educational resources about the SRS program, including:

- **Educational video** explaining the program and its benefits:
<https://www.youtube.com/watch?v=fZW4p1fOmWM>
- **Frequently Asked Questions:** <http://www.medicaid.ohio.gov/Portals/0/Initiatives/DDR/FAQ-SRS.pdf>
- **Sample letter** sent to individuals who may be eligible for the SRS program:
<http://www.medicaid.ohio.gov/Portals/0/Initiatives/DDR/Letter-SRS-2016-04.pdf>

My Social Security Account

To help with successful enrollment in the SRS program, you are encouraged to help individuals set up a *My Social Security* account. This may help document their disability determination from the Social Security Administration.

For information on how to set up a My Social Security account, please visit:
<https://www.ssa.gov/myaccount/lp/landing-page-icclaim-submit.html>



Provider Enrollment Guidance:
Peer Recovery Support &
Individualized Placement and Support:
Supported Employment

Provider Enrollment Guidance

Adding either peer recovery support (PRS) and/or individual placement and support: supportive employment (IPS-SE) as new services to an already enrolled provider type 84.

Providers already enrolled as a provider type 84 (community mental health service provider) may add either PRS and/or IPS-SE by contacting OhioMHAS via e-mail at MHAS-BHSupport@mha.ohio.gov or contact Ms. Monica Peck at 614-752-8360.

Please indicate the following in the body of the email:

1. Request is to add IPS-SE and/or PRS.
2. Attach a copy of the OhioMHAS certificate that includes the certified service(s) being added.
3. Contact name and phone number for any follow-up.

Please refer to the **SRS Program Provider Manual** for additional detail on provider enrollment and billing guidance, which can be found here: http://bh.medicaid.ohio.gov/Portals/0/Users/008/08/8/SRS-Program-Provider-Manual_v1.0.pdf?ver=2016-09-09-122909-367



SRS Program MyCare and Managed Care Impact Overview

OAC 5160-43-02

Specialized Recovery Services Program

Responsibilities of Medicaid Managed Care

- Managed Care Plans must coordinate with the Recovery Manager and IE for individuals enrolled in traditional managed care
- SRS are outside of the capitation payment until behavioral health is carved into managed care

Specialized Recovery Services (SRS) Program Enrollment into Managed Care - Timeframe

Currently Eligible and Enrolled in Medicaid – SRS Clinical Diagnosis	Maintain current managed care/MyCare enrollment.
MyCare – Recurring Spenddown	Maintain MyCare enrollment.
Delayed Spenddown (SRS Aid Code)	January 1, 2018
Newly Eligible due to SRS Clinical Diagnosis ((i) Aid Category)	January 1, 2018

Current managed care and MyCare members who become eligible for SRS will remain on their plans.

Specialized Recovery Services Program

MyCare Responsibilities

- 1 Individuals enrolled on SRS program may be enrolled in MyCare Ohio and vice versa
 - Standard 1915 c waiver transition requirements will apply to individuals enrolled in SRS program who then subsequently enroll in MyCare
- 2 MyCare Ohio Plans may prior authorize SRS in accordance with 42 CFR 438.210
- 3 My Care Ohio Plans are responsible for the payment of SRS
- 4 MyCare Ohio Plans will need to maintain a provider agreement with SRS providers
 - Plans are not permitted to perform recovery management services-they must contract with at least 1 of the recovery management providers in each region

Specialized Recovery Services Program

MyCare Responsibilities Cont'd

5 Care Management:

- Recovery Manager will be included as part of the individual's MyCare Ohio trans-disciplinary team
- The SRS program service plan will be integrated into the individual's comprehensive care plan

6

Incident Management

- Reporting of incidents in accordance with policy

7

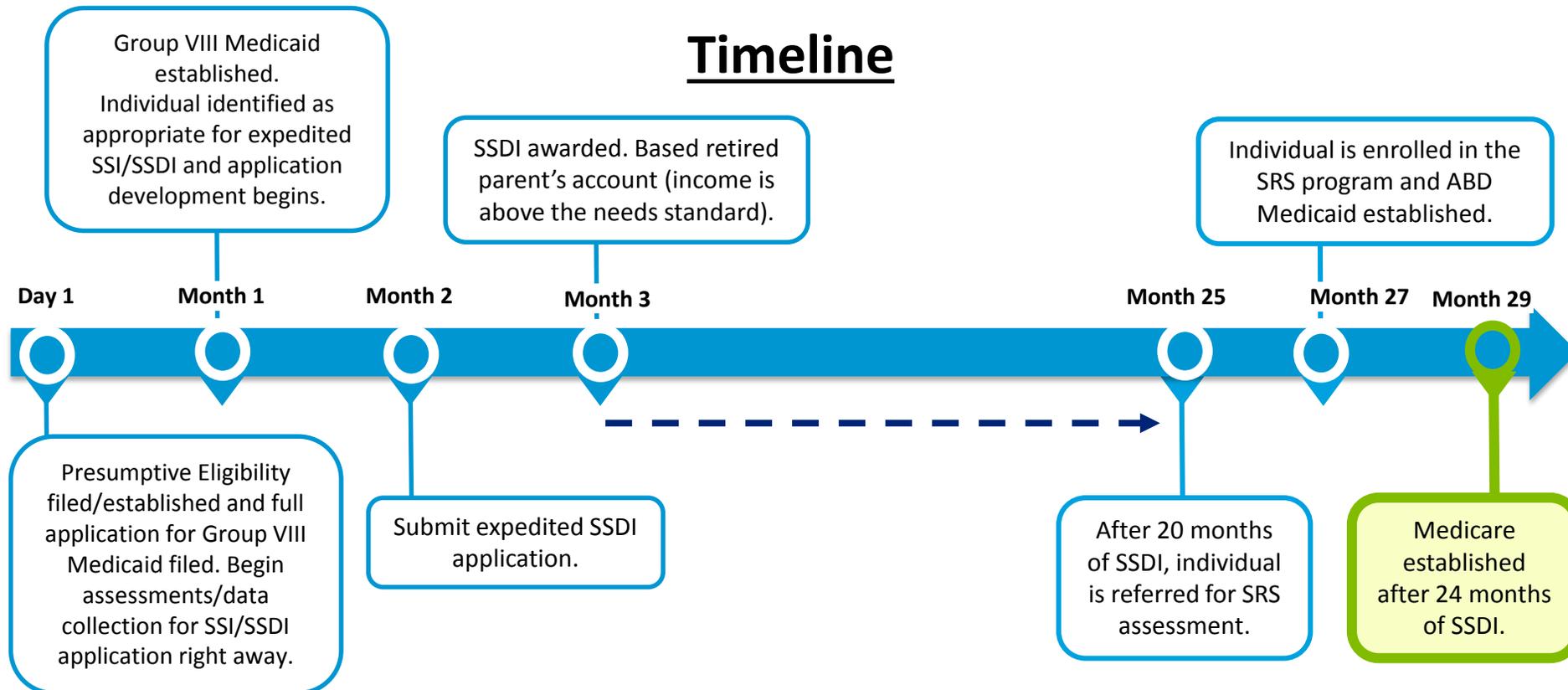
The IE will perform annual eligibility re-determinations for SRS program continued enrollment

Process for Expedited SSI/SSDI & SRS Referrals

Hypothetical Client Information

- 21 years old
- Diagnosed with Schizophrenia
- Individual has needed two hospitalizations for psychiatric illness since age 19
- Individual was referred to CMH agency during 2nd hospitalization and will need active treatment
- CMH agency is an FQHC and qualified for PE applications, and is also an expedited SSI/SSDI site

Timeline





Questions?



**MAKING
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BETTER**

