

Elderly Benefit Specialists Eligibility for Federal Match in State Funded ADRCs

The purpose of this bulletin is to clarify under what circumstances Federal Medicaid Administration Funding (federal match) can be claimed for Elderly Benefit Specialist (EBS) activity.

Aging and Disability Resource Center (ADRC) Informational Bulletin #15 addresses the ability to capture federal match when the EBS position is part of a state funded ADRC or part of the agency that operates the ADRC. Also identified in Bulletin #15 is the ability to withdraw Federal Older Americans Act (OAA) funding from supporting EBS with prior approval by the Bureau of Aging and Disability Resources (BADR) and the assurance that hours and dollars to support the EBS program would not be decreased.

Several questions have been raised requesting further clarification of what it means to be “part of” a state-funded ADRC. The approval to draw federal match was granted to the Wisconsin Department of Health Services (DHS) by the federal Department of Health and Human Services (DHHS) for specific ADRC activities and requires that 100% time reporting be completed. The Department issues a contract with an agency to operate an ADRC; the agency employs staff which creates an employer-employee relationship to meet the contractual requirements. This employer-employee relationship must exist between the Department contracted agency operating the ADRC and the EBS to be eligible to draw federal match.

One of the following three scenarios must exist in order to claim federal match for eligible EBS activity:

1. The Department contracts with the ADRC and the EBS is an employee of the ADRC.
2. The ADRC and aging unit are both part of the agency that the Department has contracted with for operating the ADRC, and the EBS is an employee of that agency. Example: Department contracts with a county or non-profit agency which operates both the ADRC and aging unit.
3. The EBS is a contract staff position through an employment or other independent agency under contract with the ADRC or the agency that operates the ADRC.

Examples:

- a. EBS is an employee of the ADRC. (Example: Portage, Brown) – Eligible
- b. EBS is an employee of the agency that the Department has a contract with to operate the ADRC. (Example: Barron, Forest). - Eligible
- c. EBS is an employee of aging unit; aging unit and ADRC are both part of the human services agency. (Example: Buffalo, Richland) – Eligible
- d. EBS is employed by an employment or other independent agency as a contract staff and the agency that the Department contracts with to operate an ADRC has a contract for the EBS staff. (Example: Kenosha, Racine) - Eligible
- e. EBS is an employee of county aging agency and ADRC is part of the human services agency; each is a separate agency within the county (Example: Fond du Lac, La Crosse) - Not Eligible
- f. The Department contracts for a multi-county ADRC with the county acting as the fiscal agent. That county subcontracts with other counties with-in the multi-county ADRC

(satellite offices). EBS at the satellite office is employed by the same agency that holds the ADRC subcontract. (Example: Buffalo & Clark Counties, Calumet & Outagamie Counties) – EBS Eligible. EBS at the satellite office is employed by a different agency than the one which holds the subcontract. (Example: Green & Lafayette Counties – Green EBS Eligible, Lafayette EBS Not Eligible; La Crosse & Jackson Counties – La Crosse EBS not eligible, Jackson EBS eligible.)

In a multi-county ADRC the same principles apply, namely that the qualifying EBS must be an employee (permanent or contracted) of the ADRC or agency that operates the ADRC. Therefore, if the multi-county ADRC is comprised of multiple county agencies that employ the EBSs, each EBS qualifies for federal claiming based on time reports. If, however, there is one EBS that is not an employee/contractor of an agency that comprises the ADRC, that EBS cannot be included in the time reporting.

In the scenarios listed above that are eligible for federal match the EBS hiring and firing rights are held by the same agency that is responsible for ADRC operations.

While all agencies within a county ultimately answer to the same county board, there is distinct hire/fire ability by each agency within the county.

While an MOU, contract or similar document may exist to satisfy the ADRC contract regarding access, staff status, location and duties, these documents do not generally provide the ADRC with an employer-employee relationship with the EBS which is necessary for the EBS position to be eligible to draw federal match.

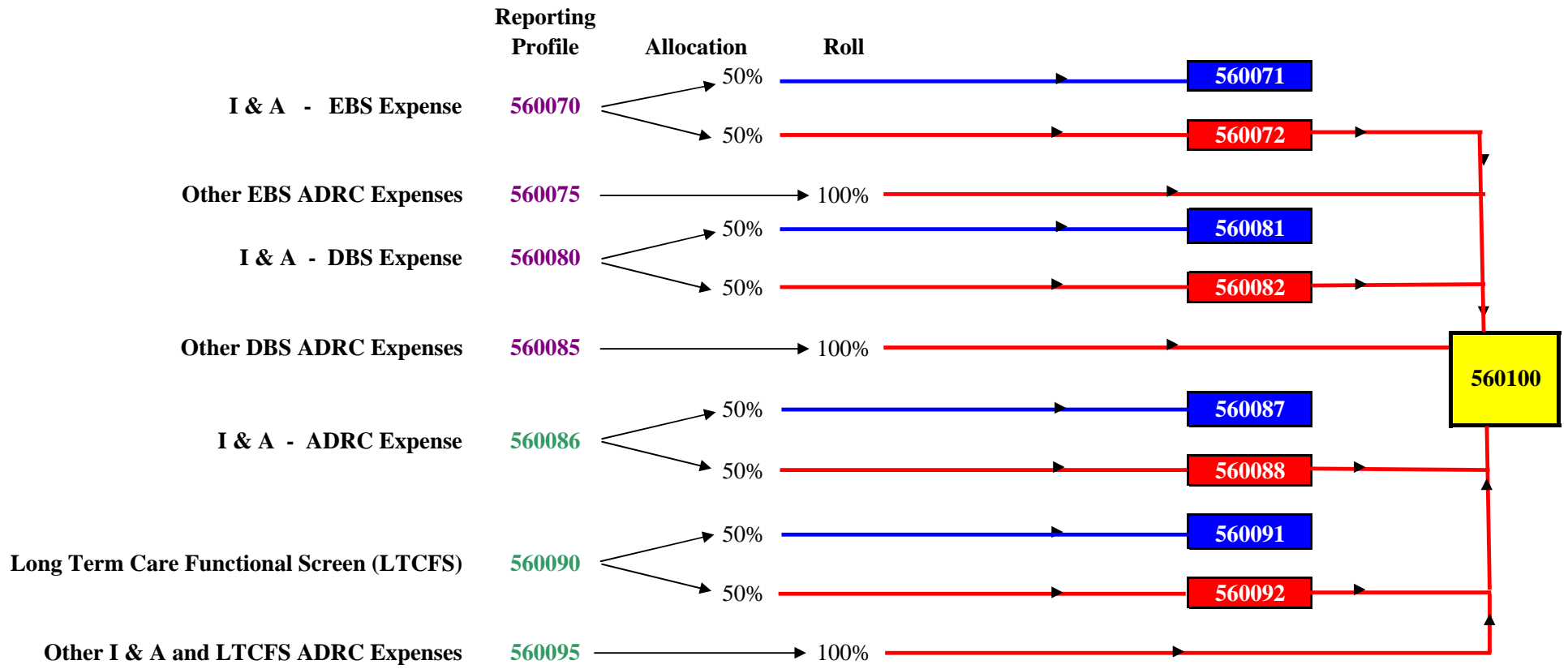
Once the EBS position has been determined eligible to claim federal match, there are four different ways to draw down federal funds:

1. Using the EBS State General Purpose Revenue (GPR) funding as match which is available through the Area Agency on Aging and designated in Community Aids Reporting System (CARS) as Benefit Specialist County. (new profiles have been established)
2. Using the OCI Replacement funding as match which is available through the Area Agency on Aging and designated in CARS as EBS OCI Replacement. (new profiles have been established)
3. Using county levy as match once either the Benefit Specialist County or EBS OCI Replacement funding has been exhausted. (use the new profiles that were established for item # 1 and item # 2)
4. If all ADRC contract requirements have been met and there are funds available a county could use the ADRC contract as the match. (new profiles have been established)

For questions contact Julie Schroeder @ 608 261-8338 Julie.Schroeder@wisconsin.gov or Gordon Bond @ 608 266-6969 Gordon.Bond@wisconsin.gov

Attachment: 2009 ADRC - CARS flowchart.xls
2009 EBS - CARS flowchart.xls

ADRC CARS Process



* Profiles 560070, 560080, 560086 & 560090 are MA eligible reporting lines that allocate 50% to Fed MA & 50% to GPR

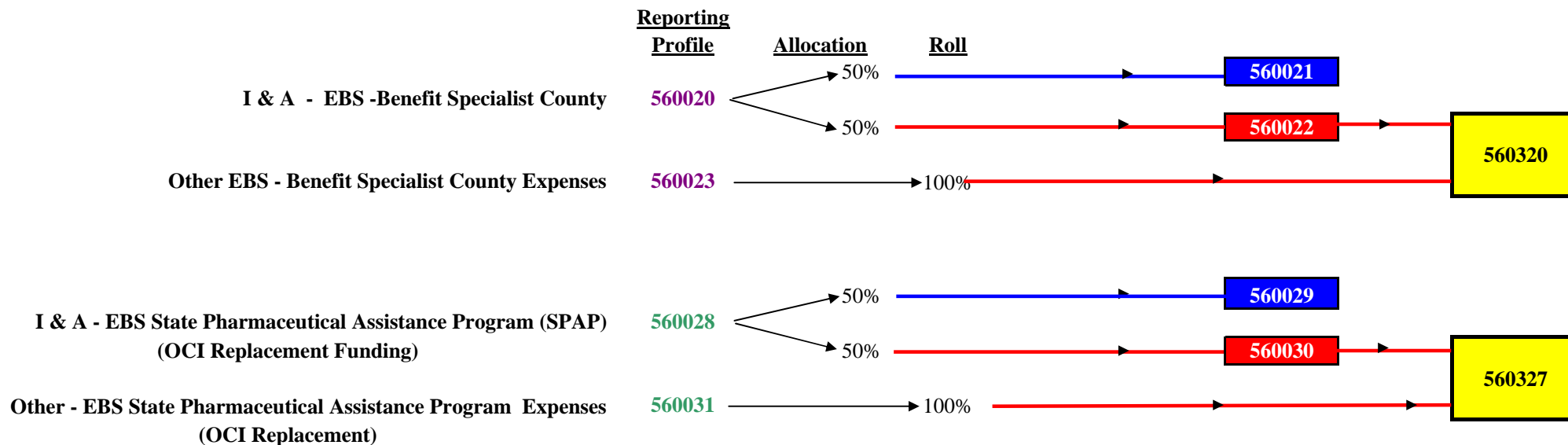
* Profiles 560071, 560081, 560087 & 560091 are funded with Fed MA & are Sum Sufficient

* Profiles 560072, 560082, 560088 & 560092 are funded with GPR and roll to profile 560100

* Profiles 560075, 560085 & 560095 are Non-MA eligible reporting lines that Roll to profile 560100

* Profile 560100 is funded with GPR & is Contract Controlled, DO NOT REPORT on THIS PROFILE.

**2009 Benefit Specialist County (EBS) and 2009 State Pharmaceutical Assistance Program Profiles
(to be used when a State-funded ADRC has an EBS eligible to claim Federal Match)**



* Profiles 560020 & 560028 are MA eligible reporting lines that allocate 50% to Federal MA & 50% to Benefit Specialist County

* Profiles 560021 & 560029 are funded with Federal MA & are Sum Sufficient

* Profiles 560022 & 560030 are funded with Benefit Specialist County & EBS State Pharmaceutical Assistance Program & roll to profile 560320 & 560327

* Profiles 560023 & 560031 are Non-MA eligible reporting lines that Roll to profile 560320 & 560327

* Profile 560320 is funded with Benefit Specialist County (GPR) & is Contract Controlled, DO NOT REPORT on THIS PROFILE.

* Profile 560327 is funded with EBS State Pharmaceutical Assistance Program (GPR) & is Contract Controlled, DO NOT REPORT on THIS PROFILE.