

## **Elderly Benefit Specialists in State Funded ADRCs and ADRC Staff Positions Funded by Multiple Sources**

*The purpose of this informational bulletin is to define the Wisconsin Department of Health and Family Services policy regarding the Elderly Benefit Specialist (EBS) position when it is a part of the Aging and Disability Resource Center (ADRC) and the ability of that position to capture Federal Medicaid Administrative Funding (Federal Match). This bulletin will also address the issue of other positions within the Aging and Disability Resource Center that are funded by more than one source (multi-funded).*

The Elderly Benefit Specialist (EBS) assists people age 60 and over with understanding and making choices regarding the complex eligibility and coverage issues that may arise for Medicare or Medicaid recipients, as well as securing other benefits or opportunities in order to remain as independent as possible. Some of these activities may be eligible to capture Federal Match through the Department's Cost Allocation Plan amendment pertaining to Aging and Disability Resource Centers' Information and Assistance (I&A) services. EBS staff working in State funded ADRCs would be eligible to claim the time the EBS position spends performing some of their regular activities, reimbursable at a 50/50 Federal Match rate. In order to obtain Federal Match, the Department must secure approval from the Centers for Medicare and Medicaid (CMS). The Federal government authorizes only certain activities for Medicaid funding, and no Federal dollars can be used to provide the required State or Local matching funds.

Currently, most of the EBS positions are multi-funded positions using Federal Title III B funds, State General Purpose Revenue (GPR) funds and in many cases County levy or local funding. While some of the activities already performed by the EBS qualify to obtain Federal Match, only activities funded by State GPR and county levy or local sources can be claimed per Federal guidelines. Activities funded with the Federal Title III B or any other Federal funds are not eligible to claim Federal Match.

The State of Wisconsin's Manual of Policy, Procedures and Technical Assistance for the Wisconsin Aging Network (the Aging Manual) requires that a minimum of 5%, or maintenance of the level of the Federal Title III B allocation previously established by the county, must be used in the Elderly Benefit Specialist program. The Department is willing to grant a waiver of this Aging Manual requirement to counties with State funded ADRCs if they can assure that they will not decrease the funding, hours or levels of service when removing the Title III B funding from their EBS program budget. The reason for the waiver is to allow for the capture of Federal Match by this position within the guidelines of the State's approved Federal Cost Allocation Plan. The ability to bring in this alternate funding will free up Title III B that can then be used to enhance the services provided within the guidelines established under the Older American Act (OAA) and the State regulations.

The State's 100% time reporting tool provides ADRCs with the ability to identify Federal Match activities and allows an agency to account for separate funding sources for those activities. With the EBS utilization of 100% time reporting procedures, an ADRC will be able to identify the portion of those activities that are eligible to be claimed for Federal Match and identify the costs that must be paid by non-federal sources. The results of the 100% time reporting that reflect the actual activity by the EBS may not match the budgeted funding for the position and will require a reconciliation of the funding sources at least quarterly and preferably monthly.

Reconciliation examples:

1. The EBS position is budgeted at 50% to OAA (Title III B) funding and 50% to State GPR. In the course of his/her actual monthly activities the person spends 25% of his/her time performing ADRC activities that qualify for Federal Match, 25% OAA activities and 50% performing activities funded with State GPR. The funding would then be 25% OAA, 25% Federal Match and 50% State GPR. As a result 25% of the originally budgeted OAA funding is available for other purposes. The ADRC would need to reconcile budget with actual time spent and complete a reconciliation adjustment.
2. The EBS position is budgeted at 50% to OAA (Title III B) funding and 25% to State GPR and 25% to Federally Matchable activities. In the course of his/her actual monthly activities the EBS spends 30% on Federally Matchable activities, which results in the need for an increase in matching funds such as State GPR, County levy or local dollars, to meet that level and claim all available matching funds. This will then reduce the need for OAA funding of the position to 40% and requires the need for a reconciliation adjustment.
3. The EBS position is budgeted at 100% to State GPR and County levy or local funding. The OAA (Title III B) funding requirement is removed per the State approved waiver requested by the county. In the course of his/her actual monthly activities the EBS spends 20% on Federally Matchable activities, which results in a decrease in the State GPR and County levy or local dollars. This will require the need for a reconciliation adjustment.

The process of reconciliation used as a result of the multiple funding sources of the EBS position is consistent with the process that must be applied to any multi-funded positions within the ADRC.

If you have any questions about this bulletin, the cost allocation methodology, 100% time reporting or multi-funded positions you may contact Julie Schroeder, ADRC Budget Analyst, Bureau of Aging & Disability Resources, (608) 261-8338, [schroja1@dhfs.state.wi.us](mailto:schroja1@dhfs.state.wi.us) or Gordon Bond, Senior Accountant, Bureau of Aging & Disability Resources, (608) 266-6969, [bondgl@dhfs.state.wi.us](mailto:bondgl@dhfs.state.wi.us)