


STATE OF WISCONSIN  
Department of Health Services  
Division of Long Term Care

DLTC Info Memo Series 2008-11  
Date: September 24, 2008  
Index Title: SSI-E Certification

To: Listserv

For: County Departments of Human Services Departments  
County Departments of Social Services Directors  
County COP and Waiver Coordinators  
Children's Services Specialists  
Community Support Programs  
Children's Services Specialists  
Board on Aging and Long Term Care  
Disability Rights of Wisconsin  
ADRCs  
MCOs  
Area Administrators/Human Services Area Coordinators

From: Sinikka Santala   
Administrator

Subject: SSI-E Certification

The purpose of this memo is to clarify who certifies and monitors for SSI-E eligibility in counties under the Family Care expansion.

### **Background**

The SSI-E supplement is a state program which provides extra monthly income to qualifying individuals who already receive state federal SSI (see policy manual at: [http://dhs.wisconsin.gov/ssi/ssi\\_e\\_policy/index.htm](http://dhs.wisconsin.gov/ssi/ssi_e_policy/index.htm)).

Under current policy, the following county agencies are authorized to carry out SSI-E certification and monitoring: Department of Social Services, Department of Human Services, Department of Community Programs, County Aging Units, and Developmentally Disabled Services. In addition, these county agencies are permitted to have the SSI-E assessment and certification forms prepared by a private contract agency.

At present, all SSI-E application forms DDE-818 ([Application for SSI-E Certification form](#)) must be signed by the agency director or by his/her authorized representative.

For non-Family Care counties and populations, county agencies are also responsible for monitoring that SSI-E recipients continue to reside in a qualified substitute care setting with costs to the person at least equal to the SSI-E payment level. If the person no longer resides in such a setting, the agency will decertify the person and will notify EDS, who will stop payment. Similarly, if the authorizing agency becomes aware that the person no longer needs at least 40 hours per month of qualifying services, the agency will decertify the person and will notify EDS.

Other reasons for termination may include: loss of federal SSI eligibility or moving to another state. Because federal SSI recipients' data interfaces with the state's system, whenever individuals are terminated from federal SSI they are also automatically terminated from state SSI and SSI-E. Occasionally someone who moves out of State is not properly identified in the federal exchange data. When counties become aware that an SSI-E recipient has moved out of state, the county should decertify the individual.

Moreover, information about a small group of State SSI "grandfathered" individuals does not interface with federal exchange data. There are approximately 4,500 of these individuals left across the state, and we expect their numbers to dwindle to zero within a few years. "Grandfathered" individuals' information is monitored on a yearly basis through a state survey process administered by EDS. Individuals who no longer meet financial eligibility criteria are terminated by EDS.

### **Family Care Expansion**

For Family Care populations in Family Care counties, the Aging and Disability Resource Center (ADRC) determines SSI-E eligibility as part of the initial functional screen process. State statutes [s.46.283(3)(k)] include SSI-E determination as one of the required ADRC responsibilities.

For non-Family Care populations, i.e., people with mental illness and children, the county could contract with a private contract agency as they currently do, or the county could contract with the ADRC.

***For SSI-E determinations performed by ADRCs, the requirement that the county agency director review and approve the SSI-E certification is being replaced by the requirement that the ADRC director or designee review and approve the SSI-E certification.*** This will simplify and eliminate the county workload related to review of SSI-E determinations for Family Care populations, as well as non-Family Care populations when counties contract with ADRCs to perform SSI-E certification for these populations.

It is possible that an individual would become eligible for SSI-E after initial enrollment in Family Care due to change(s) in the individual's condition and/or circumstances. For these cases, the MCO will complete the initial SSI-E determination and certification, since the MCO is familiar with these individuals and their functional condition. The ADRC would be responsible for the initial SSI-E determination and certification of individuals who become eligible for SSI-E after enrollment in IRIS.

### **Monitoring**

For Family Care populations, the MCO is responsible for the annual recertification of its members. The ADRC will be responsible for the annual recertification of clients in the new self-directed supports waiver, called IRIS.

It is most efficient for the monitoring of SSI-E eligibility to be coupled with the annual Family Care/IRIS recertification, because the recertification process involves a comprehensive review of a client's needs and living situation. For this reason, for Family Care populations, MCOs will be responsible for monitoring SSI-E eligibility for its members and ADRCs will be responsible for monitoring SSI-E eligibility for IRIS members, as part of the annual recertification of each group. To fulfill the monitoring requirement, the MCO or ADRC would only need to provide notification to EDS if a client no longer met SSI-E eligibility by completing Form F-20818 (available at <http://dhs.wisconsin.gov/forms1/f2/f20818.pdf> ). This form is used to both certify or decertify individuals (see item # 12 to give reason for decertification). No additional action or paperwork would be needed in cases where the client continues to meet eligibility criteria for SSI-E, which will be the majority of cases.

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