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To: ADRC and Aging Unit Directors

From: Carrie Molke, Director
Bureau of Aging and Disability Resources

Claiming Federal Medicaid Administrative Funding Reimbursement for Elder Benefit Specialist Services in Calendar Year 2020

Introduction

The Wisconsin Department of Health Services (DHS) is introducing a new process, effective January 1, 2020, for counties that wish to claim federal Medicaid Administrative (MA) funding for elder benefit specialist (EBS) services. The new process will improve the state's ability to ensure accuracy of MA claiming and consistency of supporting documentation for auditing purposes to be in compliance with federal and state guidelines for MA reimbursement.

Background

Across the state, Wisconsin EBS services are supported by a variety of federal, state, and county funding. Historically, DHS has provided state EBS program funding and allocations for county aging units through contracts with the area agencies on aging (AAAs). The AAA has, in turn, provided sub-awards to county and tribal agencies in its service area for the state EBS program. The AAA has tracked all EBS program activities and expenditures and passed reimbursements received through the community aids reporting system to aging units based on aging unit EBS claims submitted to the AAA.

With the advent of aging and disability resource centers (ADRCs), many county and tribal agencies began to use a new funding source to support EBS program services: federal MA funding. MA funding can be used to match ADRC state contract funds and other non-federal funding that supports services at the ADRC. The Bureau of Aging and Disability Resources issued waivers to many aging units, allowing them to reduce or eliminate their usage of federal Older Americans Act funding for EBS services in favor of increased reliance on state and local funding sources that were eligible sources of match for federal MA reimbursement.

- While many EBS program activities fall within the scope of federal MA funding, agencies must follow these state and federal requirements in order to access MA funds:
- The EBS worker must provide services at the ADRC or under a contract or MOU with the ADRC.
- The EBS worker must routinely track all of their work activities using the ADRC-approved Time and Task (T&T) workbook.
- The ADRC must submit EBS T&T documentation on a monthly basis to the DHS Office for Resource Center Development in their Adder workbook submission for auditing purposes.
- The ADRC director must ensure the EBS worker receives training and supervision on ADRC policies and procedures regarding T&T reporting.

New Process

Effective January 1, 2020, to comply with its MA funding agreements with the federal government, DHS will only permit agencies to claim federal MA funding for EBS services if state EBS funding that will serve as the basis for federal matching funds is managed as part of the ADRC contract. Counties that wish to claim MA funding for EBS services must submit an agreement (attached) signed by the county aging unit director and the ADRC director, authorizing DHS to issue the aging unit's state EBS funding allocation directly to the ADRC rather than the AAA and certifying that the ADRC director is willing to accept the responsibilities associated with EBS program funding. DHS will seek annual renewal of this agreement.

The EBS funding sources affected by the federal funding agreement include:

- Funding from the appropriation in [Wis. Stat. 20.435\(1\) \(dh\)](#) that is allocated to aging units according to [Wis. Stat. 46.81\(2\)](#) to support benefit specialist services for older individuals.
- Funding from the Office for Commissioner of Insurance to support counseling on state pharmaceutical assistance programs, Medicare, and other prescription drug coverage options for older individuals.

Aging units that do not wish to claim federal MA reimbursement for EBS activities will continue to receive their state EBS program funding allocations through the AAA as they have in the past. Reimbursement from the AAA will be limited to the contract-controlled amount. No MA claiming will be done at the AAA.

Additional Information

Aging units should submit a signed agreement to dhsbadrfiscal@dhs.wisconsin.gov no later than January 15, 2020, to ensure timely allocation of EBS program funding for calendar year 2020. Agencies with questions or concerns about the new process may contact dhsbadrfiscal@dhs.wisconsin.gov.

Attachment: Authorization to Allocate Elder Benefit Specialist Funding to the Aging and Disability Resource Center