

**County of Orange Social Services Agency
Family Self-Sufficiency**

Program: CalWORKs
Title: Social Security Income (SSI) Advocacy Services (Welfare-To-Work Exemptions)
Number: CW 100 - F1.A **Status:** Signature On File
Effective Date: July 1, 2014 **Revision Date:** 10/29/2014

Purpose The purpose of this policy is to provide guidelines on the utilization of Social Security Income (SSI) Advocacy services, through the Public Consulting Group (PCG) to assist clients who have been determined to be exempt from WTW participation due to a permanent and/or chronic disability through the SSI Application process.

Policy Effective July 1, 2014, PCG will assist referred exempt Welfare-To-Work clients with SSI Advocacy services by:

- Evaluating and determining referred clients suitability for application to Social Security Income (SSI) and/or Social Security Disability Income (SSDI)
- Upon submission of an application for SSI/SSDI, PCG will become the Authorized Representative (AR) assisting the client during the SSI/SSDI application process and possible appeal process. With PCG assistance, the clients' chances of having their application approved are increased.

Benefits of SSI Advocacy services include, but are not limited to:

- Increased monthly income in Federal SSI and/or SSDI benefits
- Additional State Supplemental Payments (SSP) benefits for SSI recipients
- Medi-Cal and/or Medicare Eligibility
- Greater Access to Housing
- Work Incentives
- No longer included in Work Participation Rate upon approval of SSI/SSDI

Exemption From WTW Participation due to Disability Only clients who have been determined to be exempt from WTW participation due to a permanent and/or chronic disability per CalWORKS Policy 100-F1 Welfare-To-Work Exemptions CalWORKs Policy 100-F1 Welfare-To-Work Exemptions are to be referred for SSI Advocacy. For purposes of this policy permanent and chronic disability are defined as:

Permanent Disability: Any client who has and/or submits a valid CW61, or other documentation as per CalWORKs Policy 100-F1 Welfare-To-Work Exemptions, which indicates a mental and/or physical disability that is permanent or is expected to last for 12 months or longer or

Chronic Disability: Any client who has and/or submits a valid CW61, or other documentation as per CalWORKs Policy 100-F1 Welfare-To-Work Exemptions, which indicates a mental and/or physical disability that is chronic or is expected to last for 12 months or

Any client who has had at least 3 consecutive CW61s, or other documentation as per CalWORKs Policy 100-F1 Welfare-To-Work Exemptions, which indicates a re-occurring mental and/or physical disability exempting them from WTW.

Referral Process

If it is determined that a client meets one of the listed disability definitions than a mandatory SSI Advocacy referral must be completed within 5 days of the determination.

IEES/CEES will:

- Engage client in a discussion about SSI Advocacy and the possible benefits in working with PCG.
- Provide client with a SSI Advocacy Services Program Referral (Attachment 1)
- Inform client that PCG will contact them by letter and/or phone
- Complete SSI Advocacy Services Program Referral (Attachment 1) and submit to PCG with a cc to Regional SSI Advocacy Liaison. Note: The referral will automatically default to send referral by secure email.
- Forward SSI Advocacy Services Program Referral, per regional procedures, to be virtually imaged to On-Base. SSI Advocacy e-referral form is to be imaged to the medical acco
- Update CalWIN Case Comments to indicate SSI Advocacy Referral completed.

CM will:

- Provide client with a SSI Advocacy Services Brochure (Attachment 2)
- Refer client to CEES who will complete the SSI Advocacy Services Program Referral (Attachment 1)

Special SSI Advocacy Referrals

• Cases with special SSI circumstance that do not meet current referral criteria may be eligible for a referral for SSI Advocacy Services. Detailed requests must be submitted for review to FSS Program. If approved, FSS Program will forward the SSI Advocacy Services Program Referral (Attachment 1) to PCG.

Regional SSI Advocacy Liaison

The Regional SSI Liaison will:

- Assist PCG representatives, as needed
 - In making worker contact
 - Identifying current worker

Client Participation with PCG

Client participation with SSI Advocacy is not mandatory, but highly encouraged. Workers are to strongly encourage clients to participate/cooperate with SSI Advocacy services informing clients of the possible benefits by their participation.

PCG Response

- PCG will return the SSI Advocacy Referral when
- No client contact/response was received
 - IEES / CEES /CM:
 - Virtually print the SSI Advocacy Services Program Referral (Attachment 1) into OnBase under the Medical Acco of the CalWORKs case
 - Re-engage client to discuss benefits of participation with PCG. May consult with PCG representative and attempt to set up joint meeting.
 - Submit new SSI Advocacy Services Program Referral (Attachment 1) if appropriate
 - Document in CalWIN case comments efforts and actions of re-engagement
 - Client refuses services
 - IEES / CEES /CM:
 - Virtually print the SSI Advocacy Services Program Referral (Attachment 1) into OnBase under the Medical Acco of the CalWORKs case
 - Re-engage client to discuss benefits of participation with PCG. May consult with PCG representative and attempt to set up joint meeting.
 - Submit new SSI Advocacy Services Program Referral (Attachment 1) if appropriate
 - Document actions in CalWIN case comments efforts and actions of re-engagement
 - SSI Advocacy Referral rejected:
 - IEES / CEES /CM:
 - Virtually print the SSI Advocacy Services Program Referral (Attachment 1) into OnBase under the Medical Acco of the CalWORKs case
 - Consult with PCG representative to discuss any possible next steps.
 - Submit new SSI Advocacy Services Program Referral (Attachment 1) if appropriate
 - Document actions in CalWIN case comments
 - Benefit determination has been made:
 - Approvals
 - IEES / CEES
 - Take appropriate case action(s) based on current SAR reporting requirements
 - CalWORKs Policy 100-E5.A Mid Period reporting In SAR
 - Update CalWIN case Comments as appropriate
 - Virtually print the SSI Advocacy Services Program Referral (Attachment 1) into OnBase under the Medical Acco of the CalWORKs case
 - Denials
 - IEES / CEES
 - Update CalWIN case Comments as appropriate
 - Virtually print the SSI Advocacy Services Program Referral (Attachment 1) into OnBase under the Medical Acco of the CalWORKs case

References

- CalWORKs Policy 100-F1 Welfare-To-Work Exemptions
- CalWORKs Policy 100-E5.A Mid Period reporting In SAR
- Virtually print (On Base Instructions for Virtual Printing)

Attachments

- Attachment 1: SSI Advocacy Services Program Referral (#F063-30-900)
 - Attachment 2: SSI Advocacy Services Brochure
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