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Subject: RE: Change in Presumptive Eligibility Process for SVRI Eligibility/OOS referral service

PURPOSE: This email is to clarify how DVR handles consumers who are presumptively eligible (receiving SSI or SSDI due to disability) with 8/18/2016 IRIS updates as well as to clarify the process we use when a consumer with SSI/SSDI goes through the Eligibility and OOS Assessment Unit process.

Presumptive Eligibility Process when referring to SVRI after 8/18/2016 IRIS Updates:

- DVR staff authorize PO/send referral information to SVRI. ***
- DVR will verify Social Security Number in IRIS at time consumer becomes applicant. ***
- Upon receiving IRIS alert that SSI/SSDI is being received due to disability, DVR staff will complete the presumptive eligibility upon system notification.
 - This is done by clicking the Presumed Eligible Defaults button within the Eligibility case note, completing the primary and second disability impairment/cause codes, and entering the determination date.
 - In the "What is the Disability Box", it does list the disability listed on the application to help with determining the primary/secondary impairments.
- **DVR staff person will message SVRI that Presumptive Eligibility is complete.**
- The case will remain in Status 02 with the IRIS Case Type becoming "OOS."
- The Eligibility Unit staff will notice the Eligibility tab is read only and is no longer a draft meaning that staff at SVRI does not need to do anything with the Eligibility assessment. The Eligibility information is provided for reference or for the Eligibility Unit staff to provide notes to DVR staff if they discover that the intake/medical information appears different than what the DVR staff noted as the primary and secondary disability on the eligibility tab.
- The Service Provider Portal is in real time. When the SVR staff or DVR staff saves an Eligibility or OOS draft, the other side can see it. Eligibility Unit Staff could start working on the case prior to DVR determining that the case should be made presumptively eligible, therefore, it would be best practice for DVR staff to read what is in the draft before clicking the Presumptive Eligibility Defaults button, as doing so will override the work done by the Eligibility Unit staff.

***These steps may be interchanged, depending on how quickly the PO is created and referral information emailed.

POLICY INSIGHTS REGARDING ELIGIBILITY OF SSI/SSDI RECIPIENTS:

For SSA consumers - Complete the OOS using self-report from the consumer, reported information from other sources, counselor observation, and/or existing records. Self-reported information could be obtained during the meeting with the consumer, from the application, or over the phone. WI VR policy allows the use of consumer self-report for OOS purposes. Other sources could include information on the person's functioning from family members, other professionals, etc. Use information from these sources to place the consumer in at least category 2. Do not wait for medical records to complete the OOS for category 2 placement.

Self-report from the consumer can also be used to place the consumer in category 1. If the VRC, using professional judgment, determines that the information is accurate, place the consumer in category 1. Do not wait for medical records. If the self-reported information is questionable, the person should be placed in category 2, additional assessment or records obtained, and the OOS updated based on the

obtained information or records.

If only self-report was used to place the person in category 1 or 2, obtain medical records to document the disabilities prior to IPE development.

There should not be a need for an extension of the 60-day time frame for Eligibility/OOS purposes with a consumer who receives SSI/SSDI.