

**Department of Behavioral Health
TRANSMITTAL LETTER**

SUBJECT SSI/SSDI Expedited Benefits Policy		
POLICY NUMBER DBH Policy 530.1	DATE JUN 23 2014	TL#

Purpose. To establish the policy and procedures to promote an efficient application and award process for Social Security Disability Income (SSDI) and Supplemental Security Income (SSI) applications filed on behalf of Department of Behavioral Health (DBH) consumers receiving mental health and substance use disorder services.

This revision adopts the policy from the former Department of Mental Health, now merged into the new Department of Behavioral Health, in accordance with the DBH Establishment Act of 2013.

Applicability. Applies to all consumers who receive behavioral health services (hospital and community based) who are incapable of managing their own funds and need a representative payee; all DBH certified and treatment providers with a Human Care Agreement and provide care to consumers who need a representative payee; organizations that act as representative payee; and the Behavioral Health Authority (BHA).

Policy Clearance. Reviewed by affected responsible staff and cleared through appropriate Behavioral Health Authority (BHA) offices.

Effective Date. This policy is effective immediately.

Superseded Policy. This policy replaces DMH Policy 530.1 SSI/SSDI Expedited Benefits Policy dated September 13, 2002.

Distribution. This policy will be posted on the DBH web site at www.dbh.dc.gov under Policies and Rules. Applicable entities are required to ensure that affected staff is familiar with the contents of this policy.



Stephen T. Baron
Director, DBH

6/23/14

Date


**DEPARTMENT OF
BEHAVIORAL HEALTH**
**Policy No.
530.1**
Date JUN 23 2014

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**Supersedes
DMH Policy 530.1, same subject, dated Sept. 13, 2002**
Subject: SSI/SSDI Expedited Benefits Policy

1. **Purpose**. To establish the policy and procedures to promote an efficient application and award process for Social Security Disability Income (SSDI) and Supplemental Security Income (SSI) applications filed on behalf of Department of Behavioral Health (DBH) consumers receiving mental health and substance use disorder services.
2. **Applicability**. Applies to all consumers who receive behavioral health services (hospital and community based) who are incapable of managing their own funds and need a representative payee; all DBH certified and treatment providers with a Human Care Agreement and provide care to consumers who need a representative payee; organizations that act as representative payee; and the Behavioral Health Authority (BHA).
3. **Authority**. Social Security Act of 1935, and the Establishment of the Department of Behavioral Health of 2013.
4. **Background**. SSI/SSDI programs provide a major source of income for consumers who receive services from DBH. These social security disability programs also provide access to medical benefits under the Medicaid and Medicare programs. The decision process for these benefits from application to award or denial often takes months. The intent of DBH is to work with the Social Security Administration, Disability Determination Division, and behavioral health providers to reduce the time between application and award without compromising the quality of the decision.
5. **Policy**. It is the policy of DBH that:
 - 5a. Consumers' applications for SSI/SSDI be handled in accordance with federal and local governing guidelines and practices;
 - 5b. Consumers' applications be expedited at the time of application, and include pertinent medical and other relevant information to support the claim;
 - 5c. All pertinent medical and other related evidence that is required to support a disability claim application is promptly released when requested by another behavioral health provider who or which provides a release of information form; and
 - 5d. There is continuous stakeholder communication and evaluation of the process to meet and maintain the stated goal of expediting the SSI/SSDI application process.
6. **Definitions**
 - 6a. **Benefits Liaison Group** – representatives from the Disability Determination Division, Social Security Administration, DBH, and behavioral health providers who meet to identify and resolve mutual concerns quickly as well as understand each others' role and needs in order to expedite the application and award process.
 - 6b. **Consumer** – for the purposes of this policy, adults, children, or youth who seek or receive mental health and substance use disorder services or behavioral health supports funded or regulated by DBH.

6c. Families – relatives of consumers.

6d. Social Security Disability Income (SSDI) – a federal income maintenance program administered by the Social Security Administration that protects workers and their families from loss of earnings because of retirement, death, or disability.

6e. Stakeholders – for the purpose of this policy, includes Social Security Administration, Disability Determination Division, behavioral health providers, consumers, families, and DBH.

6f. Supplemental Security Income (SSI) – a federal income maintenance program administered by the Social Security Administration for persons who are aged, blind, and disabled with little or no income or resources.

7. Responsibilities and Procedures.

7a. Behavioral Health Authority.

- (1) Promote an efficient process and procedure that reduces the time between application and disability decision.
- (2) Facilitate training by the Disability Determination Division and Social Security Administration for behavioral health providers to learn SSA requirements and the type of medical evidence necessary to support a decision.
- (3) Ensure SSI/SSDI expedited application packets with all accompanying forms are provided to behavioral health providers.
- (4) Facilitate communication between the Disability Determination Division, Social Security Administration, and behavioral health provider representatives through establishment of a Benefits Liaison Group, in order to early identify and quickly resolve mutual concerns.
- (5) Evaluate and monitor the process to meet and maintain goals. Benchmark results with other areas.

7b. Behavioral Health Providers.

- (1) Determine if a consumer is eligible to apply for SSI/SSDI.
- (2) Determine if a SSI/SSDI eligible consumer has applied for benefits.
 - (a) If the consumer has not applied for benefits, call for an appointment at the Social Security Administration at 1-800-772-1213.
 - (b) Submit a completed SSI/SSDI expedited application benefit package. Ensure the following forms [SSA-3368; SSA-3369; SSA-821; Current Behavioral Status; Activities of Daily Living; hospital/clinic records; SSA-827; and SSA-1696-U4] are included and completely filled out.
 - (c) If necessary, accompany the consumer to the Social Security Administration appointment and provide the completed application packet.
- (3) Assist consumer(s) in signing up or applying for other benefits and assistance during the interim period from application to decision.

- (4) Ensure that a process is in place so that there is coordination of procedures, complete SSI applications, monitoring of applications, and appropriate person(s) to follow-up on problem cases and/or serve as a liaison to the Benefits Liaison Group.
- (5) Ensure that all inpatient and outpatient medical records are made available to behavioral health providers for the purpose of expediting the SSI application process.
- (6) Ensure all staff who are involved in the SSI/SSDI expedited application process receive mandatory and related SSI/SSDI training and continuing education in order to maintain an adequate level of competency.
- (7) Follow steps (1)-(3) for reinstatement of SSI/SSDI benefits if a consumer's benefits were discontinued, notifying SSA that the application is for reinstatement.
- (8) Provide any subsequent information requested by the Disability Determination Division to support disability continuation reviews within five (5) working days of request.

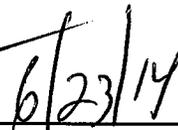
7. **Inquiries.** For inquiries about this policy, please contact the Manager, Adult Systems of Care at telephone number (202)671-3217.

Approved by:

Stephen T. Baron
Director, DBH



(Signature)



(Date)