




**Commonwealth of Massachusetts**  
*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
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Governor  
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**Field Operations Memo 95-41**  
**December 19, 1995**

Gerald Whitburn  
Secretary  
Joseph Gallant  
Commissioner

**TO:** Local Office Staff  
**FROM:**  Joyce Sampson,  
Assistant Commissioner for Field Operations  
**RE:** EAEDC/SSI Conversion Program Referral and Response Form

**Background**

The Department has contracted with a new vendor to provide EAEDC recipients with assistance in applying for and obtaining Supplemental Security Income (SSI) benefits. This vendor is MAXIMUS, Inc. MAXIMUS will provide assistance at the SSI application and first appeal (reconsideration) levels only. These services will be implemented statewide throughout the month of January. During the last two weeks in December, however, MAXIMUS staff will begin to meet with local office directors, and will be able to accept any initial referrals which the local office may make.

**Purpose of Memo**

This memo introduces the EAEDC/SSI Conversion Referral and Response Tracking Form (see Attachment A) to be used by the local office when referring EAEDC recipients to MAXIMUS. It also describes the procedures the local office must follow when making a referral.

**Purpose of Form**

The EAEDC/SSI Conversion Program Referral and Response Form serves three purposes. Specifically, this form:

- refers EAEDC recipients to the Department's EAEDC/SSI conversion vendor;
- provides an authorization to release case information to expedite the SSI claim; and
- informs the local office contact person of the disposition of the recipient's referral.

**MAXIMUS Staff**

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**MAXIMUS staff** will provide services onsite at each DTA local office statewide according to a rotating schedule. Each staff person will cover multiple locations, but will be based at one key office in his or her region. (See Attachment C.)

MAXIMUS will be able to accept a limited number of referrals each month for assistance with the SSI claim. Attachment C provides guidelines for the number of referrals MAXIMUS will be able to accept during the start-up period. Thereafter, MAXIMUS will notify each local office contact person, prior to the first day of each month, regarding the number of referrals MAXIMUS will be able to accept during the next month.

Due to the limitation on the number of referrals MAXIMUS will be able to accept each month, referrals will be filled on a "**first come first served**" basis. To keep track of the first-come-first-served agreement and the number of referrals made, the local office must maintain a log of all referrals to MAXIMUS. (See instructions below and Attachment B.)

**Note: Once the maximum number of referrals has been reached, all other recipients required to apply for SSI must be referred directly to SSA.**

**Local Office  
Director/Designee  
Responsibilities**

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The local office will be responsible for designating a local office contact person who will:

- maintain a monthly log of referrals;
  - fax the log sheet to the vendor each day or as needed;
  - fax the log each month to the Program Management Unit, Central Office at (617) 727-0166;
  - mail all Department referral forms with attached copy of the current, signed AP-SSI-1 to the vendor in the vendor's self-addressed envelope;
  - notify the local office director when the maximum number of referrals has been reached each month; and
  - distribute any referrals returned by MAXIMUS for appropriate worker action.
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**Local Office  
Worker  
Responsibilities**

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See the EAEDC Reference Guide, pages 1-27 through 1-29 for SSI application and cooperation requirements. When the worker has the recipient sign the AP-SSI-1 form, the worker must also have the recipient sign the referral form. (If the worker identifies any applicant who is potentially SSI eligible, the worker should also have the applicant sign the referral form in case it is needed when the applicant becomes a recipient.) The worker must forward the recipient's referral form and a copy of the current, signed AP-SSI-1 form to the local office contact person (unless the worker has been informed that the maximum number of referrals has been reached) when:

- the worker receives an **EAEDC recipient's completed medical report** from the recipient, the physician or MRT, showing that the recipient is disabled due to a physical or mental impairment which has lasted or is expected to last at least 12 months or to result in death; or
- the worker conducts an eligibility review and finds that the recipient has been receiving EAEDC for one year or longer as a disabled person and has not applied for SSI in the past year, or the recipient's SSI application was denied and he or she has not filed a reconsideration appeal.

When completing the upper portion of the Referral and Response Form with the recipient, the worker must explain to the recipient the reason for the referral and for using this form. The worker must sign the form in the appropriate space and ensure that the recipient understands and signs the form in the appropriate space. The worker must give a copy to the recipient and explain that MAXIMUS will contact him or her, if it is an appropriate referral, to schedule an appointment for an interview about SSI eligibility. The worker must give the original referral form, with a copy of the AP-SSI-1 form attached, to the local office contact person. File a copy of the referral form and the original AP-SSI-1 form in the recipient's EAEDC case file.

The worker must allow the MAXIMUS staff person access to the recipient's case file to obtain any medical or psychological information that may expedite the SSI claim.

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**Updating PACES** Upon receipt of a completed EAEDC Referral and Response Form from the vendor, showing that MAXIMUS has accepted the recipient for services, the worker must update PACES with **Action Reason 18** to indicate that there is an SSI application pending. (Refer to Appendix C of the *PACES User's Guide* for a description of Action Reason 18.)

**MAXIMUS Staff  
Responsibilities**

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MAXIMUS staff will conduct a face-to-face interview and screen the recipient for potential SSI eligibility. If the recipient is potentially eligible for SSI benefits, the MAXIMUS staff person will help the recipient to complete an SSI application or reconsideration request, and to gather the necessary medical information required by SSA. The vendor will provide other case management services. For example, the vendor must ensure that the recipient meets SSA deadlines and attends medical examinations scheduled by SSA. The vendor will also be able to provide transportation and accompany the recipient to SSA appointments or examinations, when necessary.

The MAXIMUS staff person will file the copy of the current AP-SSI-1 in the MAXIMUS case folder. He or she will complete the bottom portion of the referral form and send the completed form back to the local office contact person, indicating the status of the recipient (showing, for example, that the recipient has been accepted for SSI conversion services, that the SSI application or reconsideration appeal has been filed, or that the recipient did not appear for the vendor appointment).

Using the attached form, MAXIMUS will also notify the local office contact person of any referrals that were not accepted for help and the reason the case was not accepted.

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**Note:** *Noddle's Island Multi-Service Agency (NIMSA) is continuing to provide SSI conversion services to EAEDC recipients in Boston whose disability involves substance abuse and/or HIV infection. Boston area local offices should continue to refer appropriate recipients to NIMSA as in the past.*

**Questions**

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If you have any questions, have your Hotline designee call the Policy Hotline at (617) 348 - 8478.

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