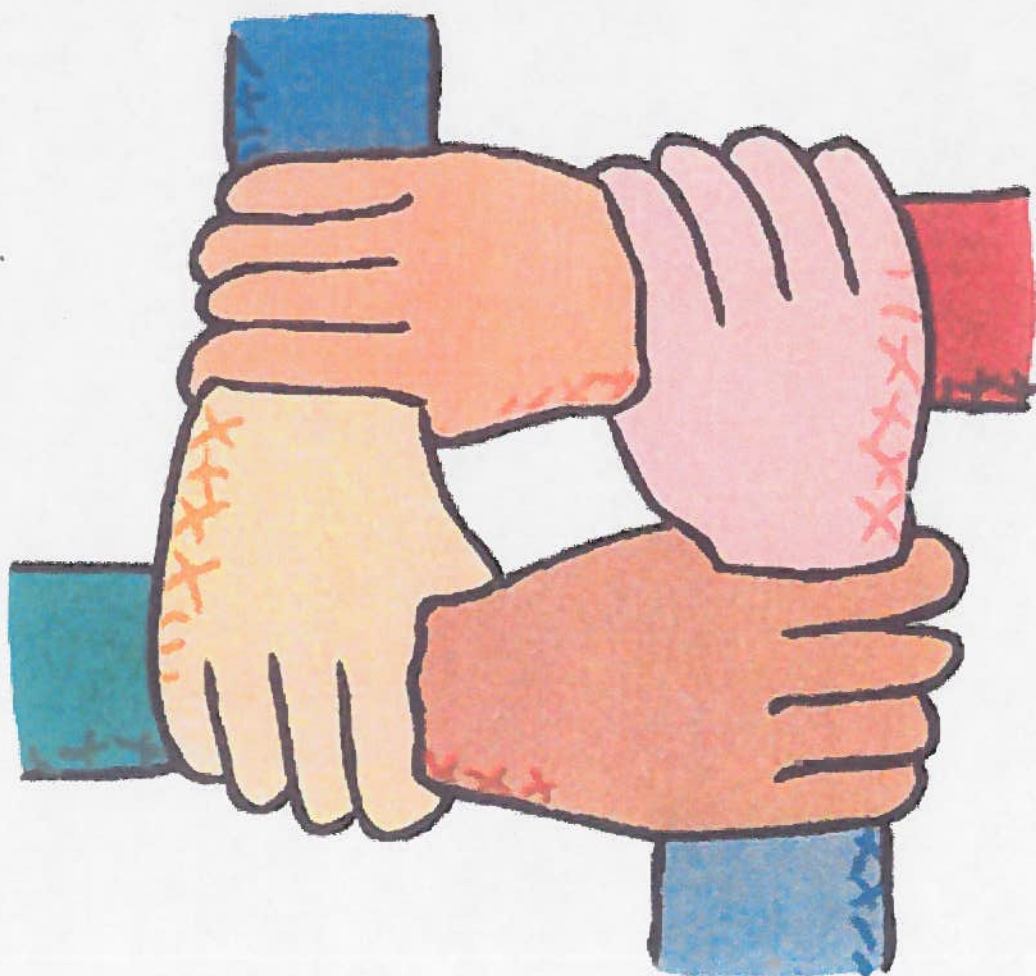


Helpful Agencies



Section 4



The Arc
of San Antonio

Serving People With Developmental Disabilities



Planning For the Future 2014-2015

A series of workshops designed to help parents/caregivers of children/young adults with developmental disabilities plan for the future

****Please note the training schedule has been revised to
Combine session topics****

WORKSHOP SESSIONS

September 13th: Introduction To Support Agencies

Panel Presentation with The Alamo Local Authority (ALA),
Department of Assistive and Rehabilitative Services
(DARS) and an overview of the Medicaid Waiver programs

November 8th: Social Security

Attendees will learn the differences between SSI and SSDI.
Additional topics include: work incentives, fair share and
Disabled Adult Child (DAC).

April 11th: Guardianship/Special Needs Trust

Join us for an overview of guardianship and the alternatives
available. A Special Needs Trust allows an individual to
retain vital resources without losing essential benefits.
Methods of setting up and funding a trust will be discussed
and the Arc's Master Pooled Trust will be highlighted.

**RSVP Required! Contact the Outreach Department
Heather Long (210) 490-4300 ext. 113 or hlong@arc-sa.org**

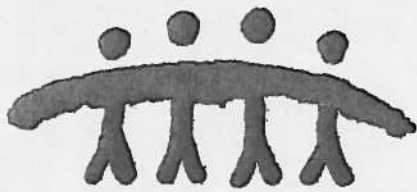
**Workshop
Time and
Location:**

**Saturdays
9:00a-11:00a**

**The Arc of San
Antonio Pam
Stephens Center
6530 Wurzbach
SAT 78240**

*Childcare is not offered by
the Arc during these
sessions. Respite is avail-
able on site through Respite
Care of San Antonio with a
Reservation. For more in-
formation, please
contact Kathy Ramirez at
(210) 737-1212*





The Arc
of San Antonio

Serving People With Developmental Disabilities



SIXTY YEARS
THE ARC OF SAN ANTONIO

Case Management Program

Our **FREE** Case Management Program helps parents of children and young adults with disabilities connect to funding resources and community programs.

There is
NO charge
to your family
for this
service.

Let us help you...

- **Connect to community services**
 - Medical coverage, medical providers, respite care, funding sources, food and utility assistance programs, etc.
- **Learn how to plan for post-graduation options**
 - Such as day programs, residential services, guardianship, supported employment, etc.
- **Obtain medical equipment, supplies and therapies for your child.**
- **Be better informed through quarterly parent training sessions about community services, special education rights, etc.**
- **Find parent support groups**

How do you qualify for The Arc's Case Management Program?

You must live in Bexar County and have a child between 3 and 21 years of age with special needs.

For Information Contact:

Liz Perez
(210) 490-4300
ext. 103
lperez@arc-sa.org

Se habla español

Two Locations

West Avenue
13430 West Avenue
SATX 78216
(210) 490-4300

Pam Stephens Center
6530 Wurzbach Rd
SATX 78240

For more information, please visit www.arc-sa.org



United Way of San Antonio
and Bexar County

ENHANCING THE LIVES OF PEOPLE WITH INTELLECTUAL AND/OR DEVELOPMENTAL DISABILITIES



The Arc
of San Antonio

Serving People With Developmental Disabilities



SIXTY YEARS
THE ARC OF SAN ANTONIO

Hours

Childcare & Teen Club:

After school:

Monday - Friday
2:30pm - 6:30pm

Summer and Holidays:

Monday - Friday
7:00am - 6:30pm

Adults**:

Monday - Friday
8:30am - 4:00pm

**Extended care hours
are available for adults

Two Locations:

West Avenue
13430 West Avenue
SATX 78216
(210) 490-4300

Pam Stephens Center
6530 Wurzbach Rd.
SATX 78240



United Way of San Antonio
and Bexar County

Childcare Ages 5-12 Teen Club Ages 13-22

- 1:4 staff to child ratio
- Experienced Staff trained in special needs and certified in CPR and first aid. A full time registered nurse on staff
- A curriculum based program that includes exercise, nutritious snacks, accessible playground, gym and socialization.
- Access to The Arc's free case management services from licensed social workers - to help with finding funding for childcare and other services.
- Extended hours until 6:30 pm as well as holiday and summer programs.
- Limited financial assistance is available.

For More Information:

Brooke Kearney
Director of Child Care
(210) 490-4300 ext. 106 -West Avenue
or
(210) 682-4200—Pam Stephens Center
bkearney@arc-sa.org

Adult Life Enrichment Program

Enriched curriculum based upon 7 domains. Each domain is based on functional skills that clients can use in their daily lives, as well as exposure to activities that that will expand their current knowledge. Domains include:

1. Literacy for Life
 2. Money & Time Management
 3. News-2-You & Current Events
 4. Cooking & Exploration
 5. Community & Social Skills
 6. Recreation & Hobby
 7. Computers & Technology
- Volunteerism in the community including projects with Meals on Wheels, Project 4 Paws and San Antonio Food Bank
 - Outings to local restaurants, recreational activities, arts, local theater and more.

West Avenue
Jennifer Tarr

Director of Adult Day Services
(210) 490-4300 ext. 119
jtarr@arc-sa.org

Pam Stephens Center
Anna Garcia

Director of Adult Day Services
(210) 682-4200 ext. 201
agarcia@arc-sa.org

For more information, please visit www.arc-sa.org



If you would like more information please contact us by phone, email, or stop by our office.

We are located at 8700 Tesoro Drive, Suite 800 (8th Floor).

Hours of Operation
8:00 a.m. - 5:00 p.m.

Monday - Friday

Alamo Local Authority

8700 Tesoro Drive, Ste. 800

San Antonio, TX 78217

Phone: (210) 832-5020

Fax: (210) 225-5937

E-Mail: ala@aacog.com

www.aacog.com/ala



Alamo Local Authority
for Intellectual and Developmental Disabilities
Alamo Area Council of Governments

Providing access
to community services
and supports for
individuals of
Bexar County



with intellectual and
developmental
disabilities

(210) 832-5020

What are the Services Available through the Alamo Local Authority?

ALA Services* include

- Providing Eligibility Determination for individuals requesting services.
- Consumer Benefits screening to ensure eligible individuals are receiving maximum state and federal benefits.
- Providing grant funds to eligible individuals, for services and supports needed due to the disability, through the In-Home and Family Support Services program.
- Maintaining the Home and Community-Based Services (HCS) Medicaid Waiver Program Interest List.
- Assisting individuals with enrollment into the Home and Community-Based Services (HCS) Medicaid Waiver Program and/or the Texas Home Living (TxHML) Medicaid Waiver Program when notified by DADS.
- Service Coordination for individuals accessing General Revenue (GR) funded services, HCS and/or TxHML.
- Assisting individuals with enrollment into an Intermediate Care Facility (ICF/MR), including State Supported Living Centers, formally known as "State Schools", when appropriate.
- Presenting Community Options to residents of State Supported Living Centers, via the Community Living Options Information Process (CLOIP).

**Because some services are not immediately available your name may be placed on the interest list for that service.*

Individuals
on the
Interest List
receive an
annual contact

Who is eligible for ALA services?

Any resident of Bexar County, who is believed to have one or more of the following disabilities, may be eligible for services through the ALA.

- **Intellectual and/or Developmental Disabilities**
 - **Pervasive Developmental Disorder** (i.e., Autism, Asperger's Syndrome)
 - **Persons with related conditions** who are eligible for services in Medicaid programs operated by DADS
 - **Nursing facility residents** who are eligible for specialized services due to intellectual and developmental disabilities or a related condition.
 - **Children who are eligible for services** from the Early Childhood Intervention Interagency Council (ECI)
- We can help you find out if you are eligible for services.

How can I find out if I am eligible for services?

Individuals can begin the eligibility process by calling the ALA at **(210) 832-5020** for an intake appointment. The Eligibility Determination consists of 3 steps:

1. Intake Appointment
2. Financial Review
3. Eligibility Determination Assessment consists of IQ and adaptive skills testing.

Individuals will receive a written report, known as the Eligibility Determination Report (EDR), once the eligibility process is completed.

The results of the EDR determine if the individual qualifies for services.

Everyone must have an EDR and be determined eligible before services can begin.



Documents you need to bring to your intake appointment.

- **Proof of Income** (Income Tax Form, Pay Stubs, or SSI Award Letter)
- **Proof of Residency** (Utility Bill or Lease Agreement)
- **Special Education Testing** from the school district, when available. (The Complete Individual Evaluations)
- **Any Psychological Reports** previously completed
- **Health/Medical Information** (Doctor's letter, medication history, hospitalization history, allergies)
- **The Individual's Birth Certificate**
- **Social Security Card**
- **Insurance Information** (Private Insurance card, or Medicaid Letter)
- **Any other Legal Documents** (Conservatorship Order, Letters of Guardianship, Adoption papers, Divorce Decree, Custody papers)

General Revenue Services

Behavioral Supports

Specialized interventions by professionals to assist individuals to increase positive behaviors and to replace or modify behaviors that interfere with family or community life.

Community Supports Services

Staff provides individualized activities such as basic hygiene training or money management to consumers within their home or the community.

Day Habilitation

Assistance with improving and maintaining self help skills, and socialization, provided in a group setting.

Employment Assistance

Staff provides supports and training to find a paid competitive job within the community.

Respite Services

Respite is a short term relief service provided to a consumer when the caregiver is temporarily unavailable, to provide support due to non-routine circumstances.

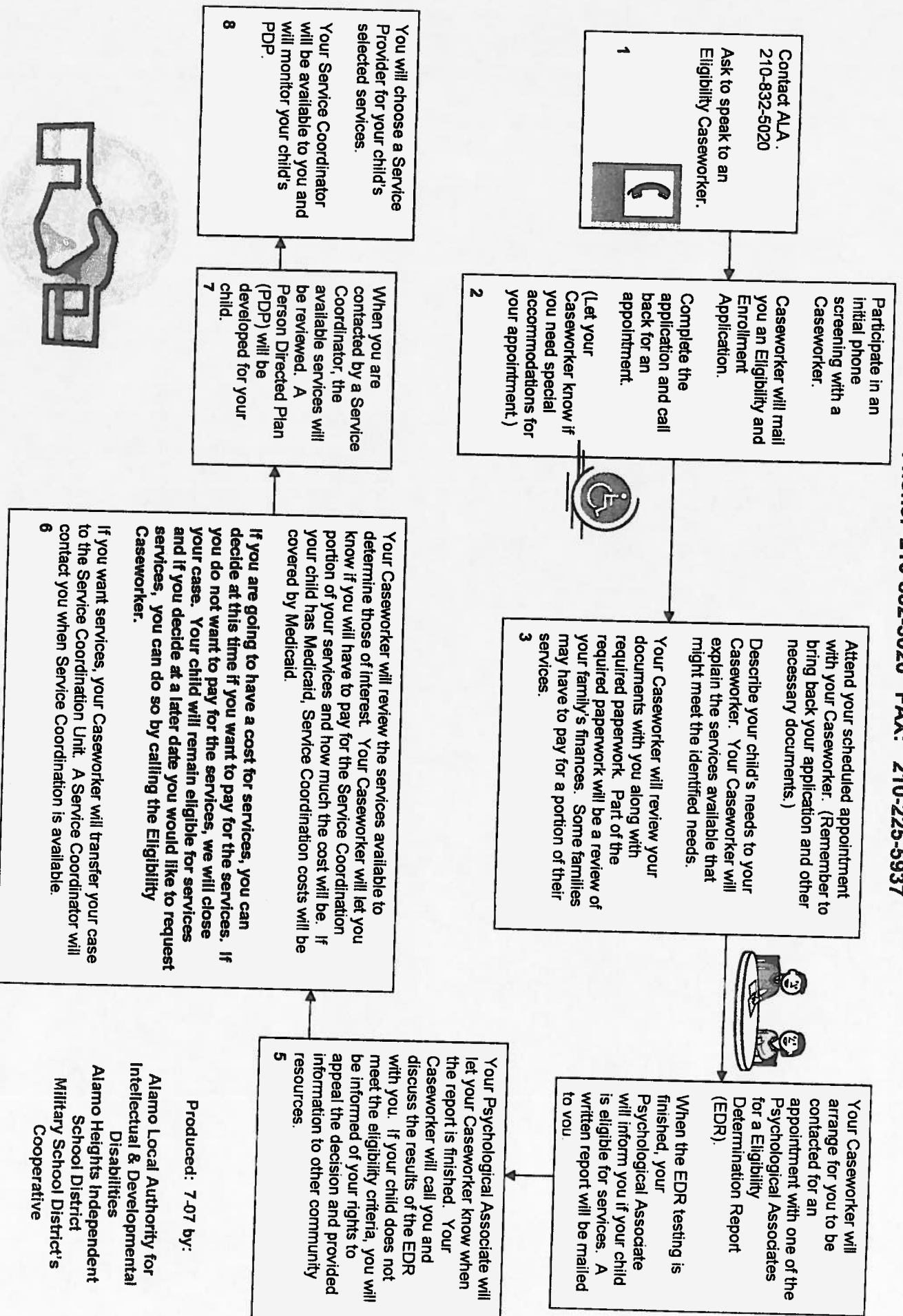
Specialized Therapies

Assessment and treatment by licensed or certified professionals for specialized therapies such as counseling, occupational therapy, physical therapy, speech, Applied Behavior Analysis (ABA), etc.

Supported Employment

Staff provides supports to the consumer to maintain a job in the community.

Alamo Local Authority for Intellectual and Developmental Disabilities (ALA) formerly BRMA
8700 Tesoro Dr.
San Antonio, TX 78217 Suite 700
Phone: 210-832-5020 FAX: 210-225-5937



Produced: 7-07 by:

Alamo Local Authority for
Intellectual & Developmental
Disabilities
Alamo Heights Independent
School District
Military School District's
Cooperative

What is a *Medicaid Waiver Program*?

- A ***Medicaid Waiver*** offers services that are typically not covered under basic Medicaid coverage. Services may include *respite care, attendant care, home modifications, residential options, adaptive aids, camp, specialized therapies, habilitation etc...*
- Allows states to *waive* certain Medicaid eligibility requirements for the delivery of unique services to a specific population.
- Allows for community based services for individuals who would otherwise be in an institution.
- ***Medicaid Waivers*** do not look at parental income or resources.

Things to Remember about *Medicaid Waiver Programs*

- ***Medicaid Waivers*** have extensive interest lists (some up to 10 years).
- An individual does not have to be on Medicaid to be place on a ***Medicaid Waiver*** interest list.
- Place your child on all interest lists that they qualify for. A child can be on several different interest lists at one time.
- Keep all correspondence mailed to you.
- Contact the ***Medicaid Waivers*** annually to verify status. Notify the programs of any changes in address or telephone number.

What are the Texas *Medicaid Waiver Programs*?

- Community Living Assistance and Support Services (CLASS)
- Medically Dependent Children's Program (MDCP)
- Home and Community Services (HCS)
- Community Based Alternatives (CBA)
- Deaf/Blind Multiple Disability (DBMD)

The above information was adapted from a presentation to ARC-SA families by George Losoya with the Center for the Study of Children with Special Health Care Needs @ UTHSCSA 7/25/03

MEDICAID WAIVER PROGRAMS IN TEXAS; A CONSUMER'S GUIDE

	CBA – (DADS) Community Based Alternatives	MDCP – (DADS) Medically Dependent Children's Program	HCS – (DADS) Home & Community-Based Services	CLASS – (DADS) Community Living Assistance & Support Services	DBMD – (DADS) Deaf-Blind Multiple Disabilities
Age/Diagnosis Requirement	Age 21 and over. Must have medical necessity criteria for nursing facility care per M.D.	Under age 21. Must meet skilled nursing care per M.D.	All ages. Must have primary Cognitive/Intellectual Disability or Autism diagnosis and have ICF/DD level of care per MD.	All ages. Must have ICF/DDD-RC level of care (onset prior to age 22) per M.D.	All ages. People w/ deaf-blindness. Must have ICF/DDD level of care 8 and third disability per M.D.
Financial Eligibility	Medicaid/ SSI financial eligibility	Medicaid/ SSI financial eligibility	Medicaid/ SSI financial eligibility	Medicaid/ SSI financial eligibility	Medicaid/ SSI financial eligibility
Approved Living Options	Natural home, adult foster care, assisted living/residential care facility.	Natural home or children's foster care facility.	Natural home, foster care or 24 hour supervised facility.	Natural home, foster care	Natural home or 24 hour supervised residential facility.
Contact Numbers:	(210) 438-6208	1-877-438-5658	(210) 832-5020	1-877-438-5658	1-877-438-5658
Services Included:					
Nursing Care	X	X	X	X	X
Personal Assistance	X		X	X	
Psychological Care			X	X	
Social Work					X
Residential Habilitation			X		X
Respite Care	X	X	X	X	X
Orientation/Mobility					X
Day Habilitation			X	X	X
Supportive Employment			X	X	
Behavior Services				X	
Therapies (OT, PT, Speech)	X		X	X	X
Specialized Therapies (Music, Recreation, etc.)				X	
Chore Provider					
Minor Home Modifications	X	X	X	X	X
Adaptive Aids	X	X	X	X Vehicle Modifications	X
Medical Supplies	X			X	
Emergency Response Services	X				
Home Delivered Meals	X				
Dietary Services			X		X
Dental Care			X	X	
Child Care		X			X (specialized medical)
Independent Advocacy					
Audio/Visual					

WHICH WAIVER DOES WHAT

An unofficial, quick reference guide to the
Texas Medicaid Waivers



Introduction

Since early 2006, Imagine Enterprises has provided training about self-determination and the Medicaid waivers to hundreds of people with disabilities and family members. Many of the people we meet at sessions around the state are getting off the waiting list for waiver services—often after many years of waiting. They are usually:

- excited about the prospect of getting services and supports to live in the community,
- overwhelmed by the decisions they need to make in a short timeframe, and
- hungry for as much information as they can get about what Medicaid waivers are and how they work.

This booklet was created in response to a request participants have made at every workshop—an easy reference guide that covers the major waivers in one place.

All of the information about the waivers comes from public information documents published on the Department of Aging and Disability Services (DADS) website. We haven't changed the information, but have attempted to format it to allow comparison between the major waivers.

While we hope this is a useful resource, it is in no way intended to be the official or final word on Medicaid waiver eligibility or services. That authority rests solely with DADS.

—September 2007

Important Note!

At this writing, the information related to the waiver services and service plan spending limits is current; but it is subject to change at any time. For the most up-to-date information for each waiver program, contact the appropriate DADS office. (See the back page for *Information Resources*.)

What is a Medicaid Waiver?

A Medicaid waiver allows the state to be more flexible in how it spends money to provide some long-term services to some people with disabilities or elderly citizens who are eligible for Medicaid. In the past, people had to be in nursing homes or other large institutions for Medicaid to pay for long-term services.

Waivers override certain rules for how that funding can be used. Now, if they meet the eligibility requirements, people can get the services they need in their own homes or other community settings, instead of having to go into a nursing home or institution.

In Texas, there are seven different waiver programs that offer a broad range of home and community-based services to people with disabilities and elderly citizens.* There are different rules and funding amounts for each of the different waivers. In general, though, they all help people get the supports they need in the community.

**In this booklet, we cover the six Medicaid waivers available to people in all parts of the state. We have not included the Consolidated Waiver Program (CWP), because it is only available to people living in Bexar County. More information about CWP is available through the Department of Aging and Disability Services (DADS).*

Waiver Eligibility

CBA— Community Based Alternatives

Individuals must have a need for skilled nursing care; meet at least two nursing facility risk criteria; be eligible for Medicaid; be age 21 or older; and have a service plan that falls within specified annual spending levels based on the Texas Index for Level of Effort for nursing facility services. Spending limits range from \$60,663 to \$127,867. Individuals needing ventilator care may have annual service plans ranging in cost from \$87,228 to \$194,282.

CBA Service Delivery: Individuals enrolling in the CBA program must select a home and community support services provider for basic CBA services. Individuals requesting assisted living/residential care, adult foster care, out-of-home respite services, emergency response services, and home delivered meals must also select individual providers for those services. In order to allow consumers more control over the employment of their service providers, consumers may elect the Consumer Directed Services Option. (See box for detail.)

CLASS— Community Living & Support Services

There is no age limit for enrollment. To qualify for this service, individuals must: have a related condition; be eligible for Medicaid; reside in the CLASS catchment area; have an initial service plan that does not exceed \$63,369; and require habilitation services, as determined by the individual's service planning team.

CLASS Service Delivery: Individuals enrolling in the CLASS program select a case management agency that provides case management services and a direct service agency that provides all other CLASS Program services. In order to allow consumers more control over the employment of their service providers, consumers may elect the Consumer Directed Services Option. (See box for detail.)

DBMD— Deaf Blind with Multiple Disabilities

To qualify for this service, individuals must: be deaf-blind and have another disability that impairs independent functioning; have either mental retardation or a related condition; be eligible for Medicaid; be age 18 or older; and have an initial service plan that does not exceed \$59,750.

DBMD Service Delivery: Consumers choose one of two Consumer Directed Services options (See box for detail.)

HCS— Home & Community-based Services Program

There is no age limit for enrollment. Individuals must have either mental retardation or a related condition that results in deficits in adaptive behavior and full scale IQ of 75 or below; be eligible for Medicaid; and have a service plan that does not cost more than \$86,313 for Level of Need (LON) 1, 5, or 8, \$98,773 for LON 6 or \$173,876 for an LON 9 annually for initial enrollment. Individuals choose to participate in the HCS program instead of the ICF-MR Program.

HCS Service Delivery: Individuals enrolling in the HCS Program select a provider for all program services.

MDCP— Medically Dependent Children Program

To qualify for this service, individuals must: be under 21 years of age; be eligible for Medicaid based on their income and financial resources; meet the medical criteria for admission to a Texas nursing facility; meet the Supplemental Security Income medical disability criteria; and have an individual plan of care that falls within specified annual spending levels based on the Texas Index for Level of Effort for nursing facility services. Annual spending level range from \$15,166 to \$31,967. If the individual is 18 years of age or younger, he or she must reside with a family member or with a foster family that includes no more than four children who are unrelated to the individual.

MDCP Service Delivery: Families of individuals enrolling in MDCP receive case management provided by DADS staff and choose among eligible providers for respite, adjunct support services, minor home modifications, adaptive aids, and transition assistance services.

TxHmL— Texas Home Living Program

An adult or child is eligible for TxHmL if he or she: has mental retardation or a related condition and meets the criteria for a Level of Care I in an ICF-MR; is a current Medicaid recipient; does not require intensive one-to-one supervision to prevent dangerous behavior; has an Individual Plan of Care (IPC) approved by the DADS; is not enrolled in another Medicaid waiver program; chooses to participate in the TxHmL program instead of the ICF-MR Program; and lives in his or her own home or family home. Annual spending may not exceed \$10,000.

TxHmL Service Delivery: A service coordinator who works for the local community MHMR center works with individuals to plan services intended to help individuals to continue to live in their own or family homes.

Consumer Directed Services Options

- **Consumer Directed Services:** Individuals may exercise the option to self-direct and manage their personal assistance services and respite care providers.
- **Consumer Directed Services Agency:** Consumers select an agency to perform payroll functions, employer orientation, training and support, and administrative and financial responsibilities on their behalf.

Waiver Services Comparison

SERVICE	CBA	CLASS	DBMD	HCS	MDCP	TxHmL	REIMBURSEMENT	COMMENTS
Adaptive Aids	✓	✓	✓	✓	✓	✓	Actual cost of item up to \$10,000 per service plan year. (\$4,000 for MDCP. \$6,000 for TxHmL.)	Additional requisition fee for CBA & CLASS.
Adjunct Support Services					✓		Hourly rate.	
Adult Foster Care	✓						Daily rate based on level of service. Individual pays room and board.	Foster home must be enrolled with Department of Aging and Disability Services (DADS) Must be age 21 or older.
Assisted Living	✓		✓				Daily rate. Individuals pay room and board.	See definitions for differences between CBA and DBMD services.
Audiology				✓		✓	Hourly rate.	
Behavior Communication Specialist			✓				Hourly rate.	See Psychology for similar services in CLASS and HCS.
Behavioral Support						✓		
Case Management	✓	✓	✓	✓	✓		HCS, CLASS: Monthly fee. DBMD: Hourly fee. CBA & MDCP: No fee, service provided by DADS case managers .	
Chore Services			✓				Hourly rate.	Service is not provided if it is available through another source.
Community Support						✓		
Day Habilitation			✓	✓		✓	HCS: Daily rate for level of need. DBMD: Hourly rate. TxHmL: Daily rate.	HCS: Up to six hours, five days, weekly. DBMD: Four or more hours, one or more days, weekly.
Dental	✓			✓		✓	HCS, TxHmL: Actual cost up to \$1,000 per year. CBA: \$5,000 annual limit.	
Dietary/Nutrition		✓	✓	✓		✓	Hourly rate.	
Emergency Response System	✓						Monthly rate.	
Employment Assistance						✓		See Supported Employment and Prevocational Services for similar services in HCS and CLASS.
Foster/Companion Care				✓			Daily rate based on level of need.	All ages qualify.
Habilitation Attendant/ Habilitation Training		✓					Hourly rate.	Similar to Personal Assistance Services in CBA program.
Home Delivered Meals	✓						Per meal.	
Intervenor			✓				Hourly rate.	

Waiver Services Comparison continued next page ➡

Waiver Services Comparison

SERVICE	CBA	CLASS	DBMD	HCS	MDCP	TxHmL	REIMBURSEMENT	COMMENTS
Minor Home Modifications	✓	✓	✓	✓	✓	✓	Actual cost with lifetime maximum: HCS, CLASS: \$10,000* MDCP, CBA, TxHmL: \$7,500 DBMD: \$5,000 *Additional requisition fee for CLASS.	HCS, CLASS, MDCP & CBA have \$300 annual allotment for maintenance/repairs, DBMD does not.
Nursing Services	✓	✓	✓	✓		✓	Hourly rate.	
Occupational Therapy	✓	✓	✓	✓		✓	Hourly rate.	
Orientation & Mobility			✓				Hourly rate.	
Personal Assistance Services	✓						Hourly rate.	Level of assistance based on individual need and plan of care. (CLASS: See habilitation attendant/training services.)
Physical Therapy	✓	✓	✓	✓		✓	Hourly rate.	
Prevocational		✓					Actual cost.	
Psychology		✓		✓			Hourly rate.	See Behavior Communication Specialist for similar services in DBMD.
Residential Habilitation Services			✓				Hourly rate.	Services in own or family home.
Residential Habilitation (24-Hour)			✓				Daily rate.	Services in group homes with three or fewer residents.
Residential Support				✓			Daily rate based on level of need.	Individuals pay room and board.
Respite Care	✓	✓	✓	✓	✓	✓	CBA, CLASS, DBMD, MDCP: Hourly rate. HCS: Daily or hourly rate.	Maximum 30 days per year in CBA, CLASS, DBMD and HCS. Up to full annual spending level in MDCP.
Social Work				✓			Hourly rate.	
Specialized Therapies		✓					Hourly rate.	
Speech/Hearing/Language Services	✓	✓	✓	✓		✓	Hourly rate	Services for hearing disorders in DBMD only.
Supervised Living				✓			Daily rate based on level of need.	Individuals pay room and board.
Support Family Services		✓					Daily rate. Individuals pay room and board.	
Supported Employment		✓		✓		✓	HCS: Hourly rate. CLASS: Actual cost.	In HCS, can be provided in conjunction with Day Habilitation with a maximum reimbursement of \$3,172.50 (150 hours of service) per year.
Supported Home Living				✓			Hourly rate.	
Transition Assistance	✓	✓	✓		✓		One-time fee of \$158.28 for provider. Maximum \$2,500 for services.	

Service Definitions

Adaptive Aids: Devices, controls, or appliances that enable users to retain or to increase their abilities to perform activities of daily living or control their environment. Adaptive aids assist with mobility, communication, or treat, rehabilitate, prevent, or compensate for conditions resulting in disability or loss of function.

Adjunct Support Services: Direct care service that helps people participate in child care, post secondary education, independent living or support moving to an independent living situation. Primary caregiver chooses the type of provider from a list of enrolled providers, including home health agencies, independently enrolled registered nurses or licensed vocational nurses.

Adult Foster Care: Twenty-four hour living arrangement in a foster home for persons age 21 or older who, because of physical or mental limitations, are unable to continue residing in their own homes. Services may include meal preparation, housekeeping, personal care, help with activities of daily living and transportation.

Assisted Living (DBMD): Habilitation, chore services, personal care, and 24-hour supervision and assistance in a group home setting that serves no more than six individuals.

Assisted Living (CBA): Twenty-four hour living arrangements in a licensed personal care home that offers personal care; home management; escort, social, and recreational activities; 24-hour supervision; supervision of, assistance with, or direct administration of medication; and transportation.

Audiology: Provides a licensed audiologist to assess and direct therapeutic intervention and training, as well as to consult with individuals, their family members and service providers.

Behavior Communication Specialist: Services to assess, develop, modify or improves individuals' cognitive and affective skills. Services include conducting behavioral assessments and making recommendations; developing strategies for improving client/staff interactions; reducing maladaptive behaviors; improving appropriate communication skills; creating meaningful and appropriate activities; resolving issues of concern to the client; supervising the implementation of behavior strategies, activity routines, and/or skills development programs and monitoring their effectiveness; and counseling with and educating the client's family, friends, and service providers about interacting with a client whose behaviors may interfere with independent living.

Behavioral Support: Specialized interventions that help a person overcome behaviors that prevent or interfere with inclusion in home and family life or community life.

Case Management: Assisting with eligibility; coordinating and developing a service plan; monitoring the quality and delivery of waiver and nonwaiver services; acting as an advocate; identifying resources and making community referrals; providing crisis intervention; and safeguarding individual rights.

Chore Services: Helps consumers maintain their homes as safe, clean environments through services such as washing floors, windows and walls; tacking down loose rugs and tiles; and moving heavy items to provide safe access.

Community Support: A wide range of individualized services in the participant's home or other community locations to support activities of daily living, participation in typical community activities, job training or employment preparation, and relationships with friends, families and others who are not service providers.

Day Habilitation: Helps individuals learn, retain, and improve their self-help, socialization, and adaptive skills so they can reside successfully in the community.

Dental: Emergency, preventive and therapeutic dental treatment, including routine exams.

Dietary/Nutrition: Provides a licensed dietician to conduct face-to-face assessment, consultation, and staff training. Services include determining basic or special therapeutic nutritional needs.

Emergency Response Services: An electronic monitoring system for use by individuals with functional impairments who live alone or are isolated in the community. In an emergency, individuals can press a button to signal for help round-the-clock.

Employment Assistance: Help locating paid employment in the community by identifying job interests, evaluating skills and support needs and locating employers offering compatible employment.

Foster/Companion Care Services: Provided to individuals of all ages in a home-like environment as an alternative to living in a group home.

Habilitation Attendant/Habilitation Training: Helps persons living in their own or their families' homes learn, retain, or improve skills related to activities of daily living including personal grooming and cleanliness, bed making and household chores, preparing and eating food, and social and adaptive skills. (See Residential Habilitation Services in DBMD, Supported Home Living in HCS and Personal Assistance services in CBA.)

Service Definitions continued next page ♦♦

Service Definitions (cont.)

Home Delivered Meals: An in-home service providing meals to individuals who are following a regular or therapeutic medical diet in the routine absence of a caregiver or attendant who could provide meals.

Intervenor: An intervenor involves individuals in community services and activities. The intervenor makes sights, sounds, and activities accessible to clients by learning their specific communication system including sign language, speech, tangible symbols, gestures, nonverbal cues, actions, and behaviors.

Minor Home Modifications: Assess the need for, arrange for, and modify or improve individuals' living quarters to allow community living and ensure safety, security, and accessibility.

Nursing Services: Services (provided by a licensed nurse) include monitoring health conditions, administering and monitoring medication, providing referrals for medical services, and training individuals, their family members, and support personnel.

Occupational Therapy: Skilled treatment to help individuals achieve independent functioning in all aspects of their lives. Services include assessing needs, developing a treatment plan, determining therapeutic intervention, training, helping with adaptive aids, and consulting with the family and provider.

Orientation & Mobility: Evaluates a person's needs and creates a plan to develop skills across an expanding environment. Services include teaching independent travel skills to individuals who are visually impaired so they can safely and efficiently negotiate their environment; and training habilitation staff to create environments that enhance independent travel and to follow through on orientation and mobility goals.

Personal Assistance Services: Personal assistants help with activities of daily living and household chores necessary to maintain clean and safe home environments. Persons receiving services live in community settings other than Adult Foster Care homes or assisted living facilities. Services may include protective supervision and help performing health-related tasks that are delegated by a registered nurse in accordance with Texas Board of Nurse Examiners rules. (See Residential Habilitation Services in DBMD, Supported Home Living in HCS and Habilitation Attendant/Training in CLASS.)

Physical Therapy: Helps individuals improve their range of motion and physical functioning, as well as retain their physical conditioning. Services include assessing needs, developing a treatment plan, determining therapeutic intervention, training, helping with adaptive aids, and consulting with the family and provider.

Prevocational: Services help individuals prepare for paid or unpaid employment, but are not job-task oriented. Focuses on concepts like compliance, attendance, task completion, problem solving, and safety. Persons served are not expected to be able to join the general workforce or participate in a transitional sheltered workshop. Services are typically provided in a group setting, such as a sheltered worksite or day activity center.

Psychology: A licensed psychologist performs services that are directed toward modifying and improving cognitive and affective skills. Services include counseling individuals and assessing and training direct service providers or family members with regard to a specific individual treatment plan.

Residential Habilitation Services: Helps persons living in their own or their families' homes learn, retain, or improve skills related to activities of daily living including personal grooming and cleanliness, bed making and household chores, preparing and eating food, and social and adaptive skills. (Same as Habilitation Attendant/Habilitation Training in CLASS and Supported Home Living in HCS.)

Residential Habilitation (24-Hour): Habilitation, chore services, personal care and 24-hour supervision and assistance in a shared apartment setting that serves no more than three individuals.

Residential Support: Supervision and assistance in a group home setting from service provider staff who remain awake during normal sleeping hours. Most individuals who receive residential support services do so to address medical conditions, maladaptive behaviors and assistance with activities of daily living.

Respite Care: This service provides temporary relief for unpaid primary caregivers or provides care when the caregiver is absent. Respite services are provided either in or out of the home.

Social Work: Assessing needs, providing direct therapeutic intervention and training and consulting

Specialized Therapies: Therapeutic intervention to decrease inappropriate behaviors, provide opportunities for socialization, and improve physical and medical status. Services include musical therapy, recreational therapy, massage therapy, hippotherapy, hydrotherapy, therapeutic horseback riding, auditory integration therapy, nutritional services; and aquatic therapy.

Service Definitions continued next page ➡

Service Definitions (continued)

Speech/Hearing and Language Services: Corrective or rehabilitative treatment for persons with speech, hearing or language disorders. Services include assessing needs, developing a treatment plan, determining therapeutic intervention, training, helping with adaptive aids, and consulting with the family and provider.

Supervised Living Services: For individuals who live in a group home setting. Services include habilitation, supervision and assistance from service provider staff, if needed, during normal sleeping hours.

Supported Employment: Helps sustain paid employment for individuals who, because of their disability, require intensive, ongoing support to perform in a work setting. Supported employment must be provided at work sites in which persons without disabilities are also employed. Services include adaptations, supervision and training, as related to the individual's diagnosis.

Supported Home Living: Helps persons living in their own or their families' homes learn, retain, or improve skills related to activities of daily living including personal grooming and cleanliness, bed making and household chores, preparing and eating food, and social and adaptive skills.

Transition Assistance Services: Helps Medicaid-eligible nursing facility residents transition from a nursing facility into the CBA, CLASS, DBMD or MDCP programs. Services include paying for one-time, initial expenses required for setting up a household, including security deposits for rent and utilities, household items, pest eradication, allergen control and one-time cleaning.

Medicaid Waiver Information Resources

DADS: Dept. of Aging & Disability Services

- **CBA Information:** Contact local DADS office. Check phone book blue pages or go online to: www.dads.state.tx.us/contact/combined.cfm
- **CLASS, DBMD or MDCP Information:** 1-877-438-5658 (toll free)
- **HCS and TxHmL Information:** Contact local Mental Retardation Authority (MRA). Check phone book or go online to: www.dads.state.tx.us/contact/mra.cfm
- **Other Useful Web Pages:**
 - Information about the Medicaid waivers: www.dads.state.tx.us/providers/waiver_comparisons
 - Local Mental Retardation Authority list: www.dads.state.tx.us/contact/mra.cfm
 - Long Term Care Quality Reporting System: <http://facilityquality.dhs.state.tx.us>

Texas Medicaid Perspectives (2007)

www.hhsc.state.tx.us/medicaid/reports/IPB6/PinkBookTOC.html

Waiver Information Network (WIN)

www.selfdetermined.org

1-800-572-7159 (Toll Free)

The Self-Determination for Texas project advances the principles of self-determination in the lives of Texans with disabilities. It's a project of Imagine Enterprises with funding from the Texas Council for Developmental Disabilities.

**Imagine Enterprises
Self-Determination for Texas
1402 Spring Cress Lane
Seabrook, TX 77586**

Telephone: 1-800-572-7159 (Toll Free)

E-mail: info@selfdetermined.org

Website: www.selfdetermined.org

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Texas Medicaid Waiver Programs



What are Medicaid Waver Programs?

Medicaid Wavier Programs fund services that help people (of all ages) live in the community instead of an institutional setting for people who have a disability, blindness or who are aging. Within each program you will find different eligibility requirements, rules, service options, and funding amounts.

When you call to access services in Texas you will learn of an “interest list,” known by families and individuals who have a disability as actually being a “waiting list.” The list varies in length depending on the Waiver Program. However, the waiting period can be as long as nine years.

Helpful Links

- Texas Department of Aging and Disability Services (DADS) Help for Texans
<http://www.dads.state.tx.us/services/listofservices.html#physical>

This site includes information on the following:

- ✓ Services for older adults (60+) and caregivers
 - ✓ Services for adults and children with medical or physical disabilities
 - ✓ Services for adults and children with mental retardation
 - ✓ Additional services
- Which Waiver Does What? – an unofficial, quick reference guide to the Texas Medicaid Waivers
http://www.thearcoftexas.org/site/DocServer/WHICH_WAIVER_DOES_WHAT_11_11_07.pdf?docID=242
 - Medicaid Waiver101 – a 14 minute video that provides a brief overview of Texas Medicaid Waiver programs. Available in English and Spanish.
<http://uttcds.org/MedicaidWaiver101.html>
 - Your Life Your Choice – a 17 minute video about the Consumer Directed Services option for HCS & TXHml Wavier participants. Available in English and Spanish.
<http://uttcds.org/DADS.html>

The Arc of Northeast Tarrant County, *removing walls to create community inclusion for all*
P.O. Box 14455 * Ft. Worth, Texas 76117 * Phone: (817) 834-7700 * Website: www.arcnetc.org

Texas Medicaid

Waiver Programs (AKA "The Lists")



Texas Medicaid waiver programs are available for children and adults with disabilities.

The waivers allow the states to offer Medicaid funded services in the community, rather than in institutions. These waivers do not consider parent's income but are based on the applicants' income and resources. The applicant must be Medicaid eligible and receive services from only one Medicaid waiver program at a time. A person's name is placed on a waiting list and is contacted when their name comes up for services. **Call immediately to place your child on the internet list.** Eligibility will be determined when they get to the top of the list (which may take years).

Waiver Program	Notes
Home and community Services (HCS) (800) 252-8154 (Local, Tarrant County Number is (817) 569-4140 and contact is Kim Lambert). Respite services, nursing, OT, PT, speech therapy, dental services, foster parenting, nursing services, psychology and social work services, case management services, supported home living offered to persons with mental retardation living at home, on their own, with foster parents or in a residence with no more than four individuals who receive services.	
Medically Dependent Children Program (MDCP) (877) 438-5658. Respite services, home modifications, and adaptive aids for medically involved children to be able to live at home.	
Community Living Assistance and Support Services (CLASS) (877) 438-5658. For persons with a disability other than mental retardation occurring before age 22, that affects ability to function in daily life. Services as an alternative to placement in a facility.	
Community-Based Alternatives (CBA) (512) 438-3693. CBA provides home and community-based services to the aged and adults with disabilities. CBA provides many services, similar to those in HCS and CLASS. If a young adult is nearing 21, you should place his or her name on the interest list for this program.	
Deaf Blind/Multiple Disability Program (512) 438-2622. For people age 18 and older who are both deaf and blind and need 24 hour support. Services range from residential group homes to support for individuals who live with their families. Some of the services include assistance with skills of daily living, home maintenance, case management, respite care, equipment, home modifications, training, and a five-day camping experience. It provides community-based services as an alternative to institutional placement.	

Adapted from page 4 of the ARC of Tarrant County's March 2008 Newsletter.

National PASS Network

Benefit QuickFacts

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Daniel Scarborough

Understanding In-Kind Support

by Daniel Scarborough

One of the most common SSI eligibility problems faced by families whose disabled adult children live with them is the issue of in-kind support.

Supplemental Security Income (SSI) is an income support program that provides monthly cash assistance of up to \$674 in 2009 to people with disabilities to assist them in providing for food, clothing, and shelter. If an individual lives in their own home, regardless of whether they rent or own, then they can receive the maximum SSI payment. Living in someone else's home does not necessarily mean that the household is required to provide food, clothing and shelter. Indeed deeming of a parent's income to pay for food, clothing, and shelter legally ends at age 18 when a child becomes an adult.

If a person who receives SSI lives in someone else's home, they can still receive the full SSI check as long as they pay their "fair share" of the household expenses in that particular household. If the SSI recipient **does not pay** their fair share of the household expenses then the Social Security Administration (SSA) considers these expenses a "donation" of assistance to the individual. Social Security gives a value to this "donation" and counts the value of that food and shelter as unearned income. This unearned income can reduce the SSI check by as much as one-third. SSA refers to as the *1/3 exclusion* and many people with disabilities lose needed SSI income because they are unaware of how to show that they are paying their fair share of household expenses. If an individual's SSI check is reduced by 1/3 rather than the full \$674 SSI check, there may be an in-kind deduction that is incorrect.

To show that you will be paying your fair share of household expenses is not complicated, but you do need to know the rules. I have enclosed a worksheet to help you with your calculation of the "fair share" of your household's expenses.

To calculate fair share find the amount of the monthly expenses for the prior 12 months for the usual actual expenses of rent (or mortgage), utilities, and food; take these monthly total costs and divide by the **total** number of people in the household to give you *prorata share* of the expenses. **If your monthly contribution to the household expenses is within \$5 of your calculated prorata share, then SSA considers that you are paying your fair share.**

To assist you in calculating the value of household expense, you should use the worksheet included with this factsheet. To claim those contributions the Social Security Administration says there must be written documentation that a contribution is being made and that such an agreement exists. To document that this is occurring, I recommend that the individual who is making the contribution agree to do so by calculating the value of their contribution then signing the costs. SSA will also require receipts to document the costs alleged.

I would forward to Social Security by certified mail to avoid SSA's persistent problem of "losing" documentation. SSA has a form that you will need to complete, but you will still need to show that there is a "written agreement" to show you agree to pay your fair share. This worksheet will serve to do that. It should be updated when cost changes occur and each year to reflect yearly cost-of-living (COLA) adjustments in the SSI amounts.

** Note: If the household expenses are greater than the costs that can be paid through full SSI eligibility (i.e. a large mortgage), then the individual should consider fair market rental in the household.*

**Agreement to Pay Fair Share of Household Cost
Worksheet**

I _____, agree to pay _____ the amount of \$ _____
each month from my resources as a my fair share of the household expenses as described below.

Item	Monthly Total /12 month average
• Food	_____
• Mortgage(including property taxes)	_____
or	
• Rent (monthly)	_____
• Heating fuel	_____
• Gas and/or electricity	_____
• Water	_____
• Sewer	_____
• Garbage removal	_____

Total household monthly operating expenses = \$ _____

**Total monthly household expenses \$ _____ divided by total number of
people in household _____ = \$ _____ prorata share of household
expenses.**

SSI recipient/ or representative payee signature _____

Head of household signature _____

Date _____



Supplemental Security Income (SSI) Benefits



The [Supplemental Security Income](#) (SSI) program pays benefits to disabled adults and [children](#) who have [limited income and resources](#).

SSI benefits also are payable to people 65 and older without disabilities who meet the financial limits.

People who have [worked long enough](#) may also be able to receive Social Security disability or retirement benefits as well as SSI. [More...](#)

How Do I Apply For SSI?

We do not have an SSI application online. If you would like to apply for SSI benefits for:

➤ [An adult with a disability](#)

➤ [A child with a disability](#)

➤ [A person age 65 and older](#)

[Appeal Our Recent Medical Decision](#)

[Return to a Saved Disability Application](#)

If You Already Receive SSI Benefits

Create a [my Social Security](#) account and sign in with us to:

- Get your [benefit verification letter](#). (includes Social Security and Medicare) and
- Check your information, benefits and earnings record.

You do not need a [my Social Security](#) account to:

- Get a replacement Medicare Card;
- Select or change the way you receive information from Social Security if you are blind or visually impaired; and
- Block electronic and automated telephone access to your personal information.

Extra Hours: This service is available on Sunday until 11:30 PM ET

Related Information

[Publications](#)

Healthcare Information

[Health Information from Department of Health and Human Services](#)

[Prescription Drug Assistance Programs](#)

[Health Benefits Under COBRA](#)



Need information about benefits for same-sex couples?

What you must report to us

[Telephone wage reporting](#)

[Employment support for people with disabilities](#)



[Work incentives for people with disabilities](#)

[When your medical condition is reviewed](#)

[Food stamps and other nutrition programs](#)

[Other SSI topics](#)

[What You Need To Know When You Get Supplemental Security Income \(SSI\)](#)

(Publication No. 05-11011)

[Schedule Of Social Security Payments](#)

Social Security

Official Social Security Website

Supplemental Security Income (SSI) Benefits

The Supplemental Security Income (SSI) program pays benefits to disabled adults and children who have limited income and resources.

SSI benefits also are payable to people 65 and older without disabilities who meet the financial limits.

People who have worked long enough may also be able to receive Social Security disability or retirement benefits as well as SSI. More...

How Do I Apply For SSI?

We do not have an SSI application online. If you would like to apply for SSI benefits for:

An adult with a disability

- Schedule an appointment with a local Social Security office to file an application. Call **1-800-772-1213** (TTY **1-800-325-0778**) from 7 a.m. to 7 p.m., Monday through Friday or contact your local Social Security office, or;
- Find out if you are eligible to receive Social Security Disability Benefits. Learn more and start the disability process at our [Apply Online for Disability Benefits](#) page.

Although this is not a SSI application, we can use most of the information you provide to start the disability process. Once you finish the online process, a Social Security representative will contact you for any additional information needed for the SSI application.

A child with a disability

Visit [Apply For Disability Benefits – Child \(Under Age 18\)](#)

A person age 65 and older

- Call us at **1-800-772-1213**. If you are deaf or hard of hearing, you can call us at TTY **1-800-325-0778**, or
- Visit your local Social Security office. (Call first to make an appointment.)

[Appeal Our Recent Medical Decision](#)
[Return to a Saved Disability Application](#)

If You Already Receive SSI Benefits

Create a *my* Social Security account and sign in with us to:

- Get your benefit verification letter. *(includes Social Security and Medicare)* and
- Check your information, benefits and earnings record.

You do not need a *my* Social Security account to:

- Get a replacement Medicare Card;
- Select or change the way you receive information from Social Security if you are blind or visually impaired; and
- Block electronic and automated telephone access to your personal information.

Extra Hours: This service is available on Sunday until 11:30 PM ET

What you must report to us

Telephone wage reporting

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Other SSI topics

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(Publication No. 05-11011)

Schedule Of Social Security Payments



Apply For Disability Benefits - Child (Under Age 18)



To apply for a child...

You **will** need to complete an Application for Supplemental Security Income (SSI) **AND** a Child Disability Report. The report collects information about the child's disabling condition and how it affects his/her ability to function.

At this time, **only** the Child Disability Report can be completed online. Please **contact us** to schedule an appointment to complete the SSI application. We **will** help you in person or by phone.

Steps to Apply

1. **REVIEW the Child Disability Starter Kit.** This kit answers common questions about applying for Supplemental Security Income (SSI) benefits for children, and includes a worksheet that **will** help you gather the information you need.
2. **CONTACT Social Security** right away to find out whether the income and resources of the parents and the child are **within** the allowed limits, and to start the SSI application process.
3. **FILL OUT the online Child Disability Report.** At the end of the report, we **will** ask you to sign a form that gives the child's doctor(s) permission to give us information about his/her disability. We need this information so that we can make a decision on the child's claim.

Note

If you previously started a Child Disability Report but did not finish it, you can use your re-entry number to **return to your online Child Disability Report**.

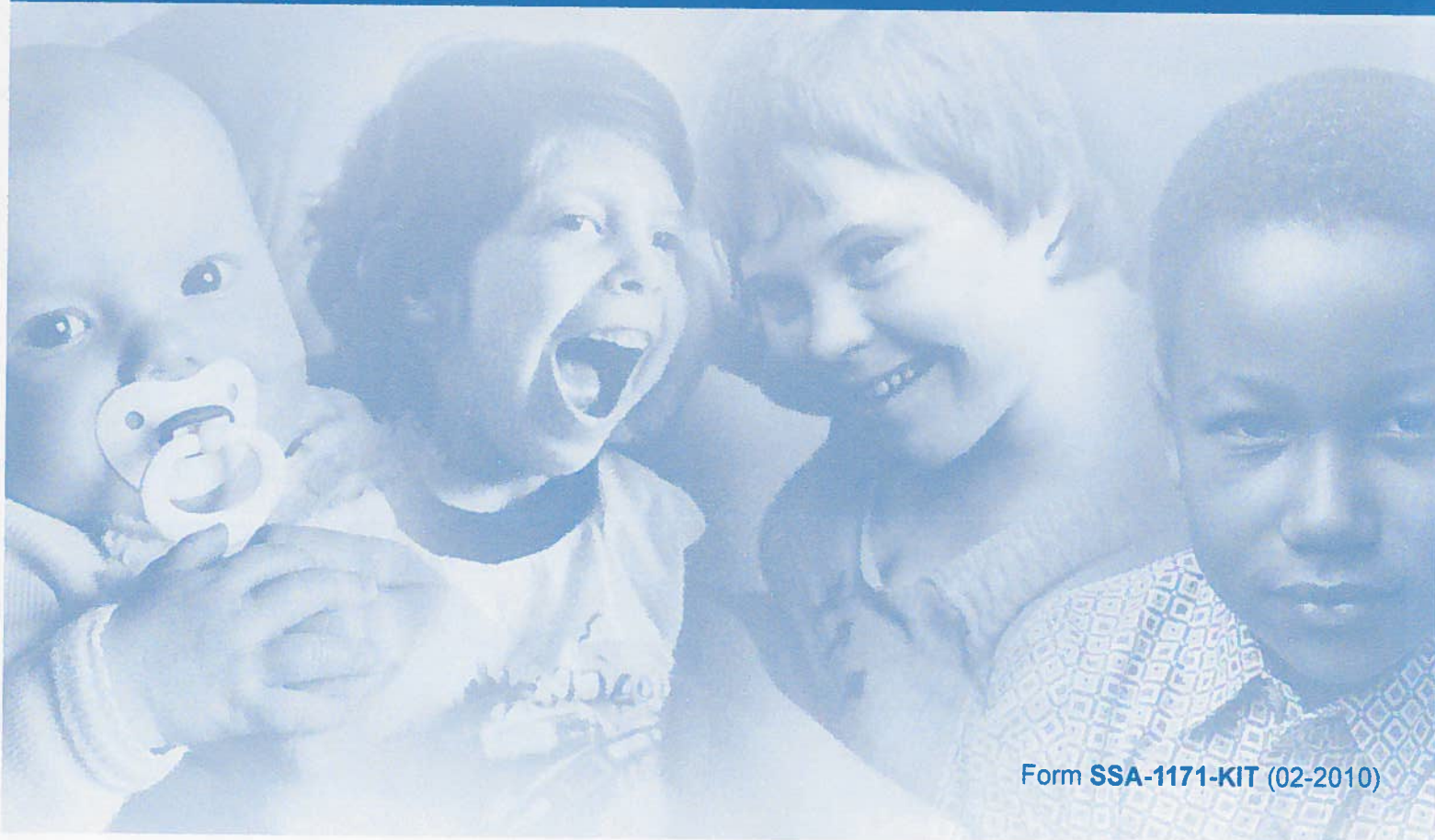
Important

If you do not **want** to do this report online or you need help, you can **call us** toll-free at **1-800-772-1213**. If you are deaf or hard-of-hearing, **call** our toll-free TTY number, **1-800-325-0778**.

Representatives are available Monday through Friday between 7 a.m. and 7 p.m.



Social Security Administration



Form **SSA-1171-KIT** (02-2010)

What You Should Know Before You Apply for SSI Disability Benefits for a Child



Children from birth up to age 18 may get Supplemental Security Income (SSI) benefits. They must be disabled and they must have little or no income and resources. Here are answers to some questions people ask about applying for SSI for children.

• How does Social Security decide if a child is disabled?

Social Security has a strict definition of disability for children.

- The child must have a physical or mental condition(s) that very seriously limits his or her activities; **and**
- The condition(s) must have lasted, or be expected to last, at least 1 year or result in death.

A state agency makes the disability decision. They review the information you give us. They will also ask for information from medical and school sources and other people who know about the child.

If the state agency needs more information, they will arrange an examination or test for the child, which we will pay for.

• How can I get ready for the disability interview?

- Review this disability starter kit. It includes a checklist and a worksheet to help you gather the information you need. **Have this information with you at the time of the interview.**
- **If you have access to the Internet**, you can fill out a Child Disability Report at www.socialsecurity.gov/childdisabilityreport
- For more information visit our website at www.socialsecurity.gov/disability/ or call toll-free 1-800-772-1213 (for the deaf or hard of hearing, call TTY 1-800-325-0778).

• How does Social Security decide if a child can get SSI?

Children can get SSI if they meet Social Security's definition of disability for children and if they have little or no income and resources. We also consider the family's household income, resources and other personal information.

• How will I know what Social Security has decided?

We will send you a letter. It can take 3 to 5 months to decide a child's SSI disability claim. Let us know if your address or telephone number changes so that we can get in touch with you.

• Will my personal information be kept safe?

Yes. Social Security protects the privacy of those we serve. As a federal agency, we are required by the Privacy Act of 1974 (5 U.S.C. 522a) to protect the information we get from you.

• What if I am more comfortable speaking in a language other than English?

We provide free interpreter services to help you conduct your Social Security business.

(over)

What You Should Know Before You Apply for SSI Disability Benefits for a Child

Other important information

SSI is not a medical assistance program. Your state Medicaid agency, local health department, social services office or hospital can help you find your nearest health care agencies. Your Social Security office can also help you find health care agencies.

• Medicaid

Medicaid is a health care program for people with low incomes and limited resources. In most states, children who get SSI benefits can also get Medicaid. Even if the child cannot get SSI, he or she may be able to get Medicaid. Your state Medicaid agency, Social Security office or your state or county social services office can give you more information.

• State Children's Health Insurance Program (SCHIP)

Children may be able to get health insurance from SCHIP even if they do not get SSI. SCHIP provides health insurance to children from working families with incomes too high to get Medicaid, but who cannot afford private health insurance. SCHIP provides insurance for prescription drugs and for vision, hearing and mental health services in all 50 states and the District of Columbia. Your state Medicaid agency can provide more information about SCHIP.

You can also go to www.insurekidsnow.gov/ or call toll free 1-877-KIDS-NOW (1-877-543-7669) for more information on your state's program.

• Other health care services

If the child is under age 16 and we decide he or she is disabled and can get SSI, we will refer him or her to your state children's agencies for social, developmental, educational and medical services. Even if the child cannot get SSI, these state agencies may be able to help him or her.

• Work opportunities for young people who are getting SSI

Many young people who get SSI disability benefits want to work. The following information may be helpful.

- We do not count most of a child's earnings when we figure the SSI payment. We count even less of a child's earnings if the child is a student.
- We subtract the cost of certain items and services that a child needs to work from his or her earnings in figuring the SSI payment.
- If a child is age 15 or older, he or she can establish a *Plan to Achieve Self-Support* (PASS). With a PASS, a child can set aside income for a work goal. We will not count this income when we figure the SSI payment.
- A child's Medicaid coverage can continue even if his or her earnings are high enough to stop SSI payment, as long as the earnings are under a certain amount.

Social Security has two programs that can assist young people who get SSI disability benefits and want to go to work:

- **Work Incentives Planning and Assistance (WIPA) program, and**
- **Protection and Advocacy for Beneficiaries of Social Security (PABSS) program.**

Your local Social Security office can provide more information about these programs. You can also find more information on our Work website, www.socialsecurity.gov/work/.

Checklist – Childhood Disability Interview

You should have as much of the following information as possible **before your interview**. This is in addition to the items requested in the enclosed appointment letter. Be ready to give us your observations about the child's daily activities.

Keep your appointment, even if you do not have all of this information. We will help you get any missing information.

☒ **Check off the items below as you gather them for your interview.**

MEDICAL INFORMATION

- ☐ Name, address, and phone number of every doctor, therapist, hospital and clinic that has seen or treated the child for at least the last year.
- ☐ Any medical records you already have, including the dates the child was seen or treated and the child's patient ID number(s), if known.
- ☐ Medication(s) the child is taking. These can be found on the medicine containers.
- ☐ Child's medical assistance number, if any.

OTHER INFORMATION

- ☐ Names, addresses and phone numbers of any schools the child attended in the past 12 months, including the names of teachers, psychologists, counselors, speech and other therapists who have seen or treated the child.
- ☐ The child's Individualized Family Service Plan (IFSP) for early intervention services or Individualized Education Program (IEP) for special education services, if the child has one; and any other school records that you may have.
- ☐ Names, addresses and phone numbers of any social service programs and the name of caseworkers that have information about the child.
- ☐ Name, address and phone number of another adult who helps care for the child and can help us get information, if necessary.
- ☐ Names, addresses and phone numbers of any employers the child has had.
- ☐ An original or certified copy of the child's birth certificate. If the child was born in another country, we also need proof of U.S. citizenship or legal residency.
- ☐ Names and Social Security Numbers for all the children and adults who live in the household.
- ☐ Proof of current income for the child and family members living in the household (for example, pay stubs, self-employment tax returns, unemployment or other program benefits, child support).
- ☐ Proof of resources for the child and parents living in the household (for example, bank account statements, life insurance policies, certificates of deposit, stocks or bonds).

The enclosed Medical and School Worksheet will help you collect the information you need for your interview.

MEDICAL AND SCHOOL WORKSHEET - CHILD

Completing this worksheet will help you get ready for the interview. It will also speed up the interview. We may ask for additional information. *If you need more space, use blank sheets of paper.*

- A. Child's height and weight. _____
- B. Name, address, phone number, and relationship of another adult who helps care for the child and can help us get information about the child if necessary.

- C. The child's illnesses, injuries, or conditions. _____

- D. When the child's condition(s) began. _____
- E. How they affect the child's activities. _____
- F. The child's current grade, if in school. _____
- G. Schools or preschools the child is currently attending, and any other schools he or she attended in the last 12 months.

NAME	ADDRESS, ZIP CODE, and PHONE NUMBER	DATES ATTENDED	KIND(S) OF SPECIAL ED. SERVICES (if any)

- H. Current teacher's name(s) and school. _____
- I. School testing the child has had, such as tests for behavior or learning problems.

NAME OR KIND OF TEST	DATE(S)	NAME OF SCHOOL

- J. Name of any school therapist the child is seeing or has seen (*for example, speech, physical, or occupational*) and the school name.

- K.** Hospitals, clinics, doctors, or therapists that have seen the child within at least the last 12 months.

NAME	ADDRESS, ZIP CODE, and PHONE NUMBER	PATIENT I.D. NUMBER	DATE FIRST SEEN	DATE LAST SEEN

- L.** Other agencies or programs that tested or examined the child, or that provided services (such as Headstart, Early Intervention Services or Special Education, Public or Community Health, Welfare or Social Service Agency, Mental Health/Mental Retardation Center).

NAME	ADDRESS, ZIP CODE, and PHONE NUMBER	KIND OF TEST OR SERVICE	DATE(S)

- M.** Medicine(s) the child takes, and the doctor's name if it is a prescribed medication.

NAME OF MEDICINE	PRESCRIBED BY

- N.** All medical tests the child had or will have for his or her illnesses, injuries or conditions. (For example, hearing test, vision test, IQ testing, blood tests, breathing tests, x-rays.)

NAME OF TEST	DATE(S)	WHERE DONE	WHO SENT CHILD FOR TEST