

<b>BENEFIT MANAGEMENT BRANCH</b> <b>Processing Location Changes</b>	<b>DCBS-DAFM-BEN-8</b>
<b>Effective Date: July 1, 2021</b> <b>Revised Date: September 1, 2024</b>	<b>Page 1 of 3</b>

**Policy Statement:**

Field Services Branch completes a change in placement level of care or location in KYGFIS. The Benefit Management Branch promptly notifies Family Support and notifies Social Security Administration, when appropriate, so that benefits can be updated to provide for the needs of Cabinet’s individuals.

**Procedure:**

The Benefit Management Branch will process any levels of care or location changes at least three times a week. The following steps are taken to process location changes:

- (1) Print location change memo from KYGFIS.
- (2) When sending a memo to Family Support the following information needs to be included:
  - a. Family Support, individual move notification. Level of care change notification.”
  - b. If the individual only moved, then you would omit the Level of Care statement.
  - c. Any time the individual moves into/back to an SCL, you will need to look up the SCL provider under vendor addresses and list it also on the memo so that Family Support knows who the provider is since Physical Address does not list a vendor. If no vendor address is entered or you think the vendor loaded has not been updated, e-mail the Fieldworker to request that one be entered into Vendor Address in Address History.
- (3) When sending a memo to Social Security Administration it should include: “Soc. Sec. Admin. Client move notification. Level of Care change notification.”  
The same policy applies to SSA memos and omit parts of the statement that are not needed.
- (4) If an individual under guardianship has no funds in his/her account, check the events on KYGFIS to ensure there is a case set up event. Proceed to the steps below if an event has been entered. If there is not a case set up event, check the face sheet on KYGFIS to determine the individual under guardianship’s status. Note the individual under guardianship’s name in the “New Client” section of the location change spreadsheet along with the status.
- (5) Evaluate which benefits an individual under guardianship may be eligible for by using the Level of Care Chart.
- (6) Check to see what benefits/income the individual under guardianship is currently receiving.

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- (a) If the individual is in the same level of care as previous and the same facility, and was admitted to the hospital (Acute hospitalization level of care):
  1. No memo needs to be sent to either agency.
  2. Note the individual's name on the "unfreeze" section on the Location Change Spreadsheet for later review.
- (b) If the individual is in the same facility and has changed levels of care:
  1. Create and print a memo to Family Support to notify them of the change. If Public Assistance (PA) needs to be stopped or started, add the following statement, after the standard notification example above: "Note: Please stop/start PA." If PA needs to be started on a individual, a memo **must** be sent by the last day of that month in order to receive PA for that month. Notify appropriate Benefit Management staff if a PA application is needed.
  2. If the individual is eligible for SSI or is currently receiving SSI, create and print a memo to SSA. If an SSI application is needed, the appropriate Benefit Management staff is notified to complete a protective file date and complete an application for that individual. If the individual needs SSI **stopped**, reinstated or an application filed, add the following statement after the standard notification example above. "Note: Please stop/apply SSI."
  3. Note the individual's name in the Care Home Refund box on the Location change Spreadsheet for further review.
- (c) If the individual moves to a different facility but remains in the same level of care as before:
  1. Create and print a memo to Family Support to notify them of the individual's move only.
  2. If the individual draws SSI, create and print a memo to SSA to notify them of the move.
  3. Add individual's name to the Care Home Refund box on the Location Change Spreadsheet for further review.
- (d) If the individual moves to a different facility and changes levels of care:
  1. Create and print a memo to Family Support to notify them of the move and change in level of care.
  2. If the individual is ineligible for PA, note this on the memo.
- (e) If the individual, w needs SSI, request a TPQY from SSA:
  1. If SSI has been terminated, notify the appropriate Benefit Management Branch staff to complete a protective file date.
  2. If any other code, send memo to reinstate SSI.

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- (f) If an individual is currently receiving SSI and is no longer eligible, create and print a memo to SSA and note to discontinue SSI.
- (g) Note individual's name in the Care Home Refund box on the Location Change Spreadsheet.
- (7) Once a month, review individuals in the location change screen that are still listed as residing in a Private or State Psychiatric facility.
  - (a) If the individual has been in a State or Private Psychiatric facility for over a **calendar month**, (ex: the individual goes in on 9/20/2008, then we would not look at the entry again until 11/1/2008), check to see if the individual receives SSI.
    - 1. If the individual receives SSI, send a memo to SSA, and notify them of the change to discontinue SSI benefits, unless the individual is over the age of 65, if the individual is over the age of 65, then ask that SSA lower the SSI amount to \$30/month.
    - 2. If the individual does not receive SSI, send a memo to Family Support to notify them that the individual has been in a state psychiatric hospital for over a calendar month and to discontinue Medicaid.
    - 3. If you find that the individual is no longer entitled to PA or SSI, review the transaction history so that any payments received in error can be returned to the appropriate agency.
- (8) Once memos have been created and printed, initial and date.
  - (a) The memos to Family Support are scanned and e-mailed to the Family Support designated inbox. In the subject line indicate, "Daily Memos for (date)".
  - (b) The memos to SSA are copied and the originals are mailed to the SSA representative.
  - (c) The copies of the SSA memos and the originals for Family Support are then stored with the Location Change Spreadsheet to be processed with frozen clients list.
- (9) Once memos have been completely processed, scan and attach to each individual's case in KYGFIS under events. Title the event "Memo to FS/SSI (date)".