



Medicaid Guide for Rep Payees of Participants served by ODP Programs

Are you the Representative Payee (Rep Payee) for someone receiving services through the [Office of Developmental Programs \(ODP\)](#)?

A Rep Payee manages benefit payments for beneficiaries who are unable to manage their Social Security or Supplemental Security Income (SSI) payments. Because Medicaid eligibility is based on income and resources, your role in managing the beneficiary's finances is critical. You may be asked to provide the [County Assistance Office \(CAO\)](#) with information about the beneficiary's income and assets to determine continued eligibility.

ODP Participants **MUST** maintain Medicaid coverage to receive necessary medical, behavioral and ODP services.

How a Representative Payee Can Help with Medicaid Renewal

Look for the **PINK** Envelope!

Participants served through the Office of Developmental Programs (ODP) **MUST** complete their Medicaid renewal paperwork as requested and submit the necessary documentation to the [County Assistance Office \(CAO\)](#) in order to maintain healthcare coverage and continue receiving critical ODP services. The CAO has made it even easier to recognize the arrival of the Medicaid renewal packet. Simply watch for a large **PINK** envelope in their mail and submit their renewal by the due date indicated.

Submit Their Renewal

- Via [COMPASS](#)
- By mail in the return envelope, or
- In-person at their [CAO](#).

Steps for assisting with Medicaid Renewal:

1. **Monitor the renewal notice.** Ensure the beneficiary is on the lookout for a renewal notice from the [CAO](#). The notice will come in a **PINK ENVELOPE** and include instructions and deadlines.
2. **Gather documentation.** Help them collect all necessary financial and personal information, including bank statements and proof of income.
3. **Contact the [CAO](#).** If you or the beneficiary have any questions or have not received a renewal notice, contact the [CAO](#) directly for assistance.
4. **Complete and submit forms.** Help the beneficiary fill out and return the renewal application promptly by the deadline listed, attaching any required documents.
5. **Report any changes.** If the beneficiary's situation changes during the year, report it to both the SSA and the [CAO](#) to prevent interruptions in benefits.

Preparing the Beneficiary for Medicaid Renewals

Sign up for [COMPASS](#)

- Create COMPASS account
- Download MyCompassPA app
- Sign up for text messages through COMPASS

Pay attention to communications

- Respond to the [CAO](#) information requests
- Renew **ON TIME!**

Address potential eligibility issues NOW



Report address changes

- Customer Service Center at 1-877-395-8930 or 215-560-7226 (Philadelphia) or to their local [CAO](#)
- COMPASS or MYCOMPASS PA mobile app

Report language needs

- Customer Service Center
- Write language needs on all documents

Be Aware of Their Renewal Date(s)!

What Determines the Beneficiary's Medicaid Eligibility?

- Residency
- Identity
- Citizenship
- Household Composition
- Resources
- Income
- [Resource and income limits](#) vary based on Medicaid category.
- Examples of income counted in determining eligibility include: wages, interest, dividends, Social Security, Veterans' benefit, pensions and spouse's income.
- Examples of resources counted in determining eligibility include: cash, checking accounts, savings accounts and certificates, stocks and bonds, some trust funds, life insurance, vehicles, revocable burial funds and non-resident property.



What if the Beneficiary is No Longer Eligible for Medicaid?

Look into Options for the Beneficiary.

If the beneficiary is no longer eligible for Medicaid when their renewal is reviewed, or if they did not provide the renewal information by the required due date, they will get a letter in the mail telling them that their coverage is stopping, and therefore LOSE eligibility for ODP programs. **YOU CAN HELP!**

If you or the Beneficiary need help, Ask Someone!

Their [County MH/ID Office](#),

Supports Coordinator, Provider,

Representative Payee or

anyone on their ISP team can get

the help they need.

Ways to Help if the Beneficiary is Denied Medicaid

Appeal

- [Request a hearing or appeal from DHS](#) if you believe it is not correct. Appeal and fair hearing rights and instructions for how to ask for an appeal will be on the denial letter.
- Ask for a fair hearing right away to keep their benefits open during the appeal process!
- **What if I he or she has too much in Income?**
Explore Options:
 - [Medical Assistance for Workers with Disabilities \(MAWD\)](#)
 - [MAWD Workers with Job Success](#)
- **What if he or she has too much in Resources?**
Explore Options: [PA ABLE Savings Program](#)

What is Medicaid?

In Pennsylvania, Medicaid is called Medical Assistance. Medicaid provides access to essential healthcare needs and daily living support, including services provided through the Office of Developmental Programs' (ODP) Home and Community-Based Waivers and Targeted Support Management (TSM). Medicaid eligibility is determined by the local CAO.

If MA was denied because of missing documentation, help the beneficiary submit ALL missing documentation to the CAO right away. If ALL the missing documentation is submitted, the CAO will re-review the renewal.

Essential Duties of a Representative Payee

1. Act only in the beneficiary's best interest.
2. Manage the beneficiary's money carefully.
3. Keep the beneficiary's money separate.
4. Keep good records of how money is spent.
5. Report, as required, changes such as if the beneficiary moves, starts or stops working, travels outside of the state or country, is imprisoned, is committed to an institution, gets married, no longer needs a payee or dies.

What a Rep Payee's Authority Does Not Cover:

It's important to remember the limits of your authority as a Rep Payee:

- You do not have the legal authority to make medical decisions for the beneficiary.
- A Rep Payee designation from the SSA is not the same as having power of attorney or legal guardianship for medical matters.

Social Security/Rep Payee Questions?

For Social Security/Rep Payee questions, visit:

- [A Guide for Representative Payees](#)
- [The United States Social Security Administration](#)
- [Frequently Asked Questions \(FAQs\) for Representative Payees](#)
- Or call 1-800-772-1213;
TTY number: 1-800-325-0778

Key Messages for Rep Payees of ODP Participants

Complete and Submit their Medicaid Renewal **TIMELY!**

You can help the beneficiary complete applications and forms for various services, and this includes Medicaid. All necessary paperwork should be filled out accurately and submitted to the state Medicaid agency on time. **LOOK FOR THE PINK ENVELOPE!** Make sure to include income and resource verification.

Provide Information about Income and Resources to their CAO.

Because Medicaid eligibility is often based on income and resources, your role in managing the beneficiary's finances is critical. You may be asked to provide the [CAO](#) with information about the beneficiary's income and assets to determine continued eligibility.

Report Necessary Changes to their CAO.

As a payee, you are required to report certain changes to the SSA. It is also important to report these changes to the [CAO](#), as they could affect eligibility. These changes include:

- Changes in income or living arrangements.
- Changes in countable resources, such as bank account balances.

While serving as a Rep Payee, you are encouraged to GO BEYOND just managing payments and be ACTIVELY INVOLVED in the beneficiary's life.

Keep Accurate Records.

You must keep detailed records of all the beneficiary's income and expenses. These records are essential for both the SSA's annual accounting report and for verifying information during Medicaid redetermination

Pennsylvania Medicaid or ODP Questions?

- [CAO](#) Statewide Customer Service Center: 1 - 877-395-8930 or 215-560-7226 (Philadelphia)
- [County Mental Health/Intellectual Disabilities \(MH/ID\) Offices](#)
- DHS Helpline: 800-692-7462; [Medicaid & CHIP Renewals](#)
- [ODP-Bureau of Supports for Autism and Special Populations](#): 866-539-7689



Helpful Resources

- [ASERT: Self-Advocate's Guide to Medicaid](#)
- [Pennsylvania Health Access Network](#)
- [Disability Rights Pennsylvania](#)
- [Pennsylvania Health Law Project](#)