

EBD Desk Aid

General Info/?'s:

Confirm / Check address, phone and identity of person calling (this includes checking representative detail pages: Legal Guardian, authorized rep, Financial, Health Care or Durable Power of Attorney). Is there documentation about the representative in ECF? If not, wait to enter into the Representative Details page until we get the form back. For our purposes:

- Acceptable documents ~ Legal Guardian, Auth Rep, Financial POA and Durable POA.
- Not an acceptable document ~ if they are *only* the Health Care POA

Note that EBD clients and reps may need more and clearer explanations than other consumer populations and providing these explanations will prevent future call backs.

Notices over view- look at notices and explain anything unclear to caller. Check due dates or what verifications are pending. Explain what is needed.

You can mail State Fact sheets to consumers to provide more information.

[Medicaid Purchase Plan \(MAPP\)](#)

[Medicare Savings Program \(MSP\)](#)

[MA Deductible](#)

[Applying for MA Disability](#)

Case Specific:

Check confirmed AG's (if the person has a MI or MCW HC segment open you can transfer to the EBD or LTC queue as appropriate)

Review due date - after review is completed align dates if needed, if HC and or FS are due in different months ask client if they would like to complete at the same time. *CC is the only program that we are not able to shorten*

Discuss medical expenses and when to send those verifications in. You may need to bring this topic up; the consumer may not know to even ask about it.

Best practice: Add text to VCL- most workers add text to explain the specifics of what is due or what verifications are required.

Check the budget pages and verification check list.



Wait! Stop! Don't automatically open for EBD related HC or MSP. **Asset questions and verifications are needed!**



Wait! Stop! Ask for help if needed--- questions can go to Help Queue, warm transfer to Help Queue if needed, PRT box, or an EBD Lead or ESS in your county.



When in doubt do not confirm the case. Gather the information and complete the call, but if you are unsure, get help before confirming the case.