

FOOTHILLS GATEWAY, INC.

Post Eligibility Treatment of Income (PETI)

DEFINITION:

In order to receive services from a Home and Community Based Service Waiver, a person must be eligible for Medicaid. Individuals eligible for Supplemental Security Income (SSI) benefits are categorically eligible for Medicaid. Persons not eligible for SSI can receive HCBS Waiver services under the 300% rule. Federal regulations require the application of a PETI assessment to determine if the person meets the 300% guidelines.

300% Rule:

An individual can become eligible for Medicaid and HCB-DD Waiver Services under the 300% Rule by meeting all of the following requirements.

- Individual does not receive SSI.
- Total income from benefits and wages is less than 300% of current SSI Standard.
- Individuals assets are less then \$2000.00

PROCEDURE:

- Assessment of PETI is a Case Management Activity and the responsibility of the Community Centered Board.

Upon admission to either the Home or Community Based Services (HCBS) Comprehensive Waiver, the Supported Living Services (SLS) Waiver or the Children's Extensive Support (CES) Waiver the Case Manager is responsible to:

- Explain PETI to the individual / family / guardian receiving Waiver services.
- Verify the type and amount of Social Security benefit received. Benefits can include Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI), Veterans Administration (VA), Railroad, and Black Lung Insurance.
- Verify who will be the Representative Payee for the person's benefit checks.
- If the person is employed, verify employer and wages.
- Include information about Social Security benefits type and amount on the Financial page of the Service Plan.

Financial Information on Service Plan:

- If the person receives SSI:
 1. The PETI Assessment form will be completed noting receipt of SSI.
 2. Indicate **not PETI eligible** and no further assessment needed.
 3. No further assessments are required unless the individual stops receiving SSI.
 4. Answer "no" to the 300% question on the Financial page and check "receives SSI".
- If the person does not receive SSI and is enrolling in HCBS-DD Waiver, SLS Waiver or CES Waiver:

1. The PETI Assessment form will be completed noting type of benefits, amounts of benefits and wages.
 2. Check **PETI Eligible / No Assessment or Payment:**
 3. The 300% Medicaid Eligibility will be noted on all Service Plan (SP) Cover Sheets for this individual and on the Financial page of the SP.
 4. The Case Manager also indicates the reason for the 300% eligibility.
- If the person is receiving SSDI **and** was eligible and received SSI prior to receipt of SSDI **and** eligibility for SSDI occurred after July 1, 1987:
 1. The PETI Assessment form will be completed noting type of benefits, amounts of benefits and wages. Attach documentation for dates of benefit eligibility if available. Check **PETI Assessment Apply (300% eligible).**
 2. Case manager also indicates reason for the 300% eligibility.
 3. The 300% Medicaid Eligibility will be noted on all SP Cover Sheets for this person.
 - If the person does not receive SSI or if the person is receiving SSDI, but never was eligible or never received SSI, or if the person became eligible for SSDI prior to July 1, 1987 and is enrolling in the Home and Community Based Services for the Developmentally Disabled (HCB-DD) Waiver, SLS Waiver or CES Waiver:
 1. The PETI Assessment form will be completed noting type of benefits, amounts of benefits and wages. Check **PETI Assessment 300% eligible** and note reason if known.
 2. The 300% Medicaid Eligible will be noted on all IP Cover Sheets for this individual.

PETI Assessment Signatures and Copies:

- Signing the Service Plan includes a verification of the 300% eligibility.

9/03. . . . 7/14; 3/16; 2/17