



Ohio Department of Mental Retardation and Developmental Disabilities

Ted Strickland, Governor

John L. Martin, Director

August 19, 2008

To: County Board of MRDD Superintendents
County Board of MRDD Waiver Contacts
County Board of MRDD Business Managers
County Board of MRDD SSA Directors

From: Patrick Stephan, Deputy Director, Medicaid Development and Administration, ODMRDD

Subject: Substitution process for persons allocated waiver capacity

Counties and ODMRDD have been working collaboratively to streamline the waiver capacity request process. ODMRDD has released various communications the process, including specific clarification memos related to emergency and replacement capacity. One area of waiver allocation not outlined in a clarification memo is the substitution process. A substitution is not a replacement, so implementation of the replacement capacity process is not required. A typical example when a substitution may be requested:

ODMRDD approves "John Doe" in the PICT for third quarter 08 for allocation of an IO waiver. The county board begins to work with Mr. Doe and determines his guardian has decided not to pursue waiver enrollment for Mr. Doe.

If a substitution is warranted, the following steps are needed:

To be completed by the County Board:

1. Email waivercapacity-support@odmrdd.state.oh.us with the following information:
 - a. Name and waiver number of the person who received the original allocation
 - b. Reason why they will not be pursuing enrollment at this time
 - c. Name of the person you wish to substitute for the above
2. Prior to sending this email:
 - a. Enter the new person into your PICT
 - b. Same waiver, same year and quarter as the original allocation
 - c. Do not enter a date into the Replacement Capacity Request Date column
3. Document in the county board file the person who will not be pursuing enrollment and the reasons why.

To be completed by ODMRDD:

1. Will receive, review and verify the information in your email
2. Will unapprove the original person in your PICT. (A DMR only function.)
3. Will approve the new person in your PICT
4. Will send a substitution allocation letter which will verify the person's name, waiver number and that the county board has 90 days to submit the waiver application for this person. (Yes, the clock starts over again.) Please do not assume the same waiver allocation number will be assigned.

Please note that Substitutions may not be submitted for allocations initially made as emergency or replacement capacity. A new request for an emergency or replacement may be submitted in these cases and the county board would notify ODMRDD of the need to retract the previous allocation.

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