

P-2320A DEFERMENTS (con't)

P-2320A Medical (B23-08)

Participants who feel they cannot take part in activities related to their goals based on medical reasons, may qualify for a **deferment** that stops the clock on the participant's time limit on countable months. Documentation from the participant's medical provider(s) is required to help determine if the deferment is needed.

Active Reach Up participant requests a medical deferment

Give participant the following form to be completed by the participant's medical provider(s) and explain what the form is used for:

- The Temporary Medical Deferment form ([210TMD](#)) is completed by the participant's provider and includes information about the participant's medical condition(s) and how the condition(s) impacts the participant's ability to take part in activities. The form also indicates how long the health condition(s) will last.
- Equivalent documentation is acceptable in lieu of the Temporary Medical Deferment form ([210TMD](#)). Equivalent documentation includes obtaining a letter from the participant's provider with information about the participant's medical condition(s) and how the condition(s) impacts the participant's ability to take part in activities. Verbal confirmation of this information can be accepted and documented in the participant's case note.
- Enter deferment code 34 with a review date 6 months out using the last day of the month as the deferment ending date. At the 6-month review date obtain a new Temporary Medical Deferment form or Equivalent documentation if the participant requests additional time.

Gathering the medical information

Create a plan with the participant to provide the medical form(s). If it is helpful to the participant, fax or email paperwork to their provider. Include this plan on the participant's FDP.

Provide the participant with a pending temporary medical deferment (code 01) in ACCESS while waiting for the paperwork to be returned. Set the review date for when the medical forms are due.

High risk pregnancy

High risk pregnancy does need to be verified. Verification can be completed through a collateral call to the medical provider. The medical provider can also provide verification in a written statement, or by using form([210TMD](#)) or by using the specific high risk pregnancy medical report form ([210HRP](#)).

Enter the appropriate participation code in ACCESS through the end of the anticipated month of delivery. If the participant continues to need a medical deferment after the birth, obtain new paperwork and follow the medical deferment procedure as you would for other medical reasons.

LUND participants

Reach Up participants living at LUND can be deferred based on their residency status and the services LUND provides. Reach Up participants living at Lund can be placed in a medical deferment code 34 for 6 months using the last day of the month as deferment ending day. If the participant discharges from Lund before 6 months this will need to be re-evaluated at discharge and a new Temporary Medical Deferment or Equivalent documentation obtained as appropriate. If participant stays at Lund longer then 6 months, then this review date can be extended.

Participant goals during deferment request

Use Stepping Stones and the goal achievement model to see what goal(s) the participant would like to focus on while the deferment request is being determined, and if it is approved. Create a plan with the participant to achieve their goal(s). It may be a very short time between when it is decided to pursue the deferment, and when a decision can be made.

For some participants, their goals will focus on the medical reasons they are requesting the deferment. For other participants, different goals may be discovered through motivational interviewing techniques. Encourage participants to engage in whatever activities they are motivated to take part in.

Medical deferment paperwork is not returned

Meet with the participant to find out if they would like to change their plan, or if there is a good cause reason why they did not return the paperwork.

Update the FDP or the goal sheet with the new plan or a new deadline for returning the paperwork. Reach out to the provider to assist the participant with the process of obtaining the paperwork. Update the review date for when the paperwork is due.

Medical deferment paperwork is returned incomplete

Contact the participant's provider to gather the missing information.

Some providers also require their own releases be completed instead of or in addition to the ESD release.

Medical deferment paperwork is returned

Reach Up Case Managers can determine the length of the deferment needed based on the medical recommendations of the participant's provider and the participant's input. The review date can be entered in ACCESS for a maximum of 6 months but can then be extended if it is determined to still be needed.

Reach Up Case Managers should continue to work with families on identifying their short- and long-term goals and use the Goal, Plan, Do, Review and Revise (GPDR/R) process to support participants in breaking these goals into manageable steps.

Sending deferment decision

Try to review the medical documentation with the participant and discuss the decision. If the participant is not available to meet, send the participant a Deferment Decision form ([614DD](#)) with basic information about the decision including dates of when the deferment starts, changes or ends. The form should include an appointment date and time to discuss the decision with the participant.

Participant disagrees with the medical decision

Consider a redetermination of the medical decision by reviewing current documentation and collecting any additional documentation from the participant's medical provider. If the redetermined decision is still not agreed with, a Fair Hearing can be requested by the participant.

Case Manager Support

Reach Up Participation Codes related to medical deferments

01 - Pending decision for deferment

33 - Medically exempt for 1 to 3 months

34 - Medically deferred >3 months

35 - Medically deferred > 3 months and applying for SSI/SSDI

Pending medical deferment

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06 13 2016          *** FAMILY DEVELOPMENT PLAN ***          ASQWOHF1
Participant: TONYA          SSN:          Financial Status: Active
Phone#:          Phase: EP 06/01/2016
Date FDP Signed: 05 16 2016          Participation Code: 01 NE
Employment Goal: 13-2011.01 Accountant          Review Date: 06 23 2016
Case Manager:          FSM          Activity          Matrix
Location:          History          History
*****
Strengths/Supports: *Shelter/Health & Safety/Child Devl & Educ          Click &
Interferes:          Comment

Job Search/          Education/          Work          Other          Life Skills
Readiness          Training          Placements          Activities

1,2 of          Activity          Hrs/Wk          Start          Target          Act End date          Outcome
Return of completed 210TMD          06 13 2016          06 23 2016          - - - - -          P

USER:          FNX: WORK MODE: C RPTGRP:          PERIOD: 06 16 COMMAND:
DO:          IMS:          REPORTING GROUP: TONYA
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Quit Retrn Exit Print Goal Hours PgBk PgFd CMH St/Sp Intra C&C
  
```

Enter code "01" on WORK/C Panel. Enter a review date that matches when the medical forms are expected to be returned.

Medical deferments and DISA panels

Codes 33, 34, 35, and 38 (usually not used) cause a DISA pop up box to appear. This will create a DISA panel in the STAT screens.

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Name of Disabled Person          Disability          Medical          Review Date
                                Factor          Decision          Mo Da Year
                                W          E          04 30 2021

Katie Beckett Date
Mo Year
-

Disability Factor:          Medical Decision:
D - Disability          E - Medically Eligible
W - RU & FS Temporary Deferment          I - Medically Ineligible
B - Blind          P - Provisionally Eligible
X - Not relevant to any factor
  
```

Enter Disability Factor of "W" RU & FS Temporary Deferment.

"D" is only used if the person is determined disabled by the Social Security Administration and should not be used for entering a Reach Up deferment code.

Enter Medical Decision as "E" Medically Eligible.

The review date that is entered on the WORK screen should auto-populate.