



Overview:

Organizations can deliver different levels of support to individuals. This is usually based on resources available to the organization. This document serves as a reference guide for four levels of support. It includes a description of each level as well as best practices to consider. Page 2 includes toolkit materials appropriate for each level of support.

1

Sharing Information about Applying

Description:

Supply materials to individuals to help them apply for Medicaid benefits.

Best Practices to Consider:

- Educate individuals regarding the process where a near real time decision can potentially be made.
- Inform individuals of what documents are useful to upload to help his or her case be processed as quickly as possible.
- Encourage individual to choose a username and password that is easy to remember.

2

Providing Resources to Apply

Description:

Supply materials and a means to apply for Medicaid benefits. At this level, a computer connected to the Internet and a scanner are required.

Best Practices to Consider:

- Educate individuals regarding the process where a near real time decision can potentially be made.
- Inform individuals of what documents are useful to upload to help his or her case be processed as quickly as possible.
- Have scanning available that applicants can use on their own to upload documents.
- Encourage individual to choose a username and password that are easy to remember.
- Supply a Take Home sheet provided in the toolkit to help individuals remember his or her username and confirmation number.

3

Assisting with Applying

Description:

Provide materials, a means to apply and a person to assist with the application. At this level, the person who is assisting a individual needs a computer connected to the Internet and a scanner to upload documents.

Best Practices to Consider:

- Educate individuals regarding the process where a near real time decision can potentially be made.
- Inform individuals of what documents to bring that are useful to upload to help his or her case be processed as quickly as possible.
- Have scanning available for relevant documents.
- Encourage individual to choose a username and password that are easy to remember.
- Equip assistors with all relevant materials so they can answer questions appropriately.
- Fill out a Take Home sheet provided in the toolkit to help individuals remember his or her username and confirmation number.

4

Serving as a Client's Representative

Description:

Supply materials, means and assistance for applying for Medicaid as well as serve as the Authorized Representative for the individual, if you have the individual's permission. Authorized Representatives can assist individuals with completion of an application, report changes, submit information to complete redeterminations of eligibility and submit verifications.

Best Practices to Consider:

- Ensure that all Authorized Representatives have reviewed the job aid and are aware of his or her responsibilities (see reverse side for link).
- Provide brochures and/or fact sheets (available online) regarding specific Medicaid programs the individual may be eligible to receive.
- Describe enrolling into a Managed Care Plan.



Below are the materials within the Ohio Benefits Self Service Portal Toolkit that are appropriate to use at each of the support levels.

1 Sharing Information about Applying

Toolkit Materials to Reference:

- Ohio Benefits Self Service Portal Reference Guide
- Ohio Benefits Self Service Portal FAQs

2 Providing Resource to Apply

Toolkit Materials to Reference:

- Ohio Benefits Self Service Portal Reference Guide
- Ohio Benefits Self Service Portal FAQs
- Ohio Benefits Self Service Portal 101
- Ohio Benefits Self Service Portal Checklist

3 Assisting in Applying

Toolkit Materials to Reference:

- Ohio Benefits Self Service Portal Reference Guide
- Ohio Benefits Self Service Portal FAQs
- Ohio Benefits Self Service Portal 101
- Ohio Benefits Self Service Portal Checklist
- Ohio Benefits Self Service Portal Assistor Toolkit
- Ohio Benefits Self Service Take Home Sheet

4 Serving as a Client's Representative

Toolkit Materials to Reference:

- Ohio Benefits Self Service Portal Reference Guide
- Ohio Benefits Self Service Portal FAQs
- Ohio Benefits Self Service Portal 101
- Ohio Benefits Self Service Portal Checklist
- Ohio Benefits Self Service Portal Assistor Toolkit
- Ohio Benefits Self Service Portal Take Home Sheet
- Authorized Representative Job Aid found here:
http://ohiobenefitsprojectwebsite.org/wp-content/uploads/2014/11/JobAid_Authorized_Rep_v1.pdf