

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS  
OF SAN BERNARDINO COUNTY  
AND RECORD OF ACTION**

**August 20, 2024**

**FROM**

**JAMES LOCURTO, Director, Transitional Assistance Department  
GEORGINA YOSHIOKA, Director, Department of Behavioral Health**

**SUBJECT**

Amendment to Contract with Health Advocates, LLC for Supplemental Security Income Advocacy Services

**RECOMMENDATION(S)**

Approve **Amendment No. 3 to Contract No. 19-348** with Health Advocates, LLC for Supplemental Security Income advocacy services, extending the contract for six additional months, for the total period of July 1, 2019 through March 31, 2025, with no change to the total contract amount of \$908,750.

(Presenter: James LoCurto, Director, 388-0245)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**Provide for the Safety, Health and Social Service Needs of County Residents.**

**Pursue County Goals and Objectives by Working with Other Agencies and Stakeholders.**

**FINANCIAL IMPACT**

This item has no impact on Discretionary General Funding (Net County Cost). The cost of \$908,750 for the total contract period (\$646,250 for the Transitional Assistance Department (TAD), and \$262,500 for the Department of Behavioral Health (DBH)), has been included in each department's 2024-25 budget. It is anticipated that San Bernardino County (County) will recover costs in excess of the contract amount from retroactive Supplemental Security Income (SSI) payments.

**BACKGROUND INFORMATION**

Under the terms of the recommended amendment, Health Advocates, LLC will continue to provide SSI advocacy services to TAD and DBH referred customers to petition for SSI benefits for County General Relief (GR) and other interim assistance services. The recommended amendment will extend the contract with Health Advocates, LLC to provide SSI advocacy services for an additional six months.

As a result of workload and the required operational, fiscal, and legal reviews, the new procurement was not completed prior to the original contract expiration date of September 30, 2024. The extension is to ensure that there is no lapse in services and will allow time to complete the new procurement presently in progress, with an anticipated contract award date of April 1, 2025.

**Amendment to Contract with Health Advocates, LLC for Supplemental Security Income Advocacy Services  
August 20, 2024**

SSI advocacy services are provided for GR and other County benefit recipients who provide proof that they are currently disabled, have been disabled, or are expected to be disabled, for a period of at least one year. In addition, legal advocacy services are provided for the appeal process when applications for SSI benefits are denied.

Since July 1988, TAD and DBH have contracted with agencies to provide SSI advocacy services. When SSI benefits are approved for recipients, financial assistance from the County is no longer needed, thereby reducing costs to the County. In addition, upon approval of SSI benefits, funds may be reimbursed to the County for payments made when the recipient was receiving interim assistance. Human Services Auditing is responsible for tracking County funds paid to recipients up to the time the Social Security Administration (SSA) approves the case and for establishing any necessary reimbursement schedules.

Health Care Advocates, LLC will continue to be reimbursed for costs associated with the performance of the SSI advocacy services on a case-by-case basis at a rate not to exceed \$7,200 or 25% of the retroactive SSI/State Supplemental Payment (SSP) and SSA Title II benefits for SSI approvals, whichever is less. Effective November 30, 2024, per the Federal Register, the rate is adjusting to \$9,200 or 25% of the retroactive SSI/SSP and SSA Title II benefits for SSI approvals, whichever is less. Health Care Advocates, LLC will not receive reimbursement for those cases not approved for SSI/SSP and SSA Title II benefits except for reimbursement of fees incurred to obtain copies of medical records, which may not exceed \$100 per recipient. After Health Care Advocates, LLC is compensated, the remaining retroactive SSI payments reimburse the County for GR assistance paid to the recipients during the appeal process period.

On May 21, 2019 (Item No. 119), as a result of a competitive procurement, the Board of Supervisors (Board) approved Contract No. 19-348 with Health Advocates, LLC, for the continued provision of SSI advocacy services, in the amount of \$568,750 for the period of July 1, 2019 through September 30, 2022. The contract included the option to extend for up to a total of five years by mutual agreement of the parties.

On September 27, 2022 (Item No. 70), the Board approved Amendment No. 1 to Contract No. 19-348, increasing the contract amount by \$170,000, from \$568,750 to an amount not to exceed \$738,750, and extending the term for one year, for a total contract period of July 1, 2019 through September 30, 2023.

On September 26, 2023 (Item No. 70), the Board approved Amendment No. 2 to Contract No. 19-348, increasing the contract amount by \$170,000, from \$738,750 to an amount not to exceed \$908,750, and extending the term for one year, for a total contract period of July 1, 2019 through September 30, 2024.

Health Care Advocates, LLC's performance will be measured by reviewing required monthly reports on the number of open, closed, and referred cases, and annual site visits by County staff to monitor compliance with the administrative, fiscal, and program requirements of the contracts.

**PROCUREMENT**

Not applicable.

**REVIEW BY OTHERS**

**Amendment to Contract with Health Advocates, LLC for Supplemental  
Security Income Advocacy Services  
August 20, 2024**

This item has been reviewed by Human Services Contracts (Patty Steven, Contracts Manager, 388-0241) on June 18, 2024; County Counsel (Adam Ebright, Deputy County Counsel, 387-5455) on July 23, 2024; Finance (John Hallen, Administrative Analyst, 388-0208) on August 5, 2024; and County Finance and Administration (Cheryl Adams, Deputy Executive Officer, 388-0238) on August 5, 2024.

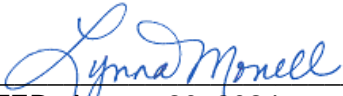
**Amendment to Contract with Health Advocates, LLC for Supplemental  
Security Income Advocacy Services  
August 20, 2024**

Record of Action of the Board of Supervisors  
San Bernardino County

**APPROVED (CONSENT CALENDAR)**

Moved: Curt Hagman   Seconded: Joe Baca, Jr.  
Ayes: Col. Paul Cook (Ret.), Jesse Armendarez, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: August 20, 2024



cc: TAD - Ettari w/agree  
Contractor - c/o TAD w/agree  
File - w/agree  
MBA 08/22/2024