

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

September 26, 2023

FROM

GILBERT RAMOS, 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. 2 to Contract No. 19-348** with Health Advocates, LLC for Supplemental Security Income Advocacy Services, 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.

(Presenter: James LoCurto, Assistant 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 is not expected to exceed a total of \$170,000 for the 12-month period (\$120,000 for the Transitional Assistance Department (TAD), and \$50,000 for the Department of Behavioral Health (DBH)), which has been included in each department's 2023-24 budget and will be included in the 2024-25 recommended 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. 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

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receiving interim assistance. Human Services (HS) 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 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 25% or \$7,200 of the retroactive SSI/State Supplemental Payment (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 the result of a formal 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.

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.

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

This item has been reviewed by Human Services Contracts (Patty Steven, Contracts Manager, 388-0241) on August 22, 2023; County Counsel (Adam Ebright, Deputy County Counsel, 387-5455) on August 23, 2023; Finance (John Hallen, Administrative Analyst, 388-0208) on September 1, 2023; and County Finance and Administration (Cheryl Adams, Deputy Executive Officer, 388-0238) on September 11, 2023.

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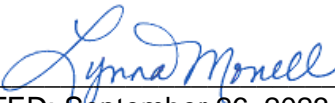
Record of Action of the Board of Supervisors
San Bernardino County

APPROVED (CONSENT CALENDAR)

Moved: Joe Baca, Jr. Seconded: Jesse Armendarez

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

Lynna Monell, CLERK OF THE BOARD

BY 
DATED: September 26, 2023



cc: TAD - Gudino w/agree
Contractor - c/o TAD w/agree
File - w/agree

CCM 10/12/2023