



USMC EFMP SSI/SSDI AND MEDICAID WAIVER

UNDERSTANDING THE BASICS

■ SSI vs. SSDI

- **Supplemental Security Income (SSI):** Based on financial need (income/assets) and for people with disabilities or those aged 65+. Can be for a child or adult.
- **Social Security Disability Insurance (SSDI):** Based on the work history of the recipient or a parent/spouse. Not means-tested (financial eligibility is not based on income/assets), but the service member's income may impact initial eligibility for a disabled adult child (DAC) benefit.

■ **Medicaid Waivers:** Medicaid is a state-run program, even though it follows federal guidelines.

- **What they do:** Home and Community-Based Services (HCBS) Waivers allow individuals to receive services (examples: therapy, personal care or respite) in their home community instead of an institution.
- **Crucial for Military Families:** Waivers may have waiting lists and eligibility varies state by state. This is a critical PCS (Permanent Change of Station) consideration.

Key Action Items for EFMP Families

- **Financial Planning:** Applying for SSI/SSDI is an essential part of long-term financial planning for a family member with special needs.
- **Impact of Military Pay:** Understand that active-duty military pay will likely make an individual ineligible for SSI while the service member is on active duty due to the income limits. However, they may be eligible for SSDI (DAC) if criteria are met.
- **Apply Early for Waivers:** Apply for Medicaid Waivers in your new state before or immediately after a PCS move. Waiting lists can be years long; applying ASAP is critical.
- **Maintain Records:** Keep a comprehensive binder or digital file with all medical, educational (IEP/IFSP/504), financial and Social Security Administration (SSA) correspondence. You will need this for all applications and recertifications.
- **Consult Legal/Financial Professionals:** EFMP can refer you to legal resources to discuss setting up a Special Needs Trust (SNT), which can protect assets and allow a family member to remain eligible for SSI/Medicaid.

How EFMP Helps

- **EFMP is your resource:** The EFMP Family Support staff can provide information, referrals and non-clinical case management to help you navigate the application processes.
- **We don't apply for you, but we guide you:** EFMP cannot file the SSA or Medicaid applications on your behalf, but we can connect you with resources and training to understand the requirements and timelines.
- **PCS Planning:** Work with EFMP to research the Medicaid and Waiver systems in your projected state before you execute PCS orders.

OUTREACH SERVICES

FAMILY TRAININGS

Trainings for families and dependents

■ Topics offered:

- Introduction to EFMP
- Respite Care,
- Accessing Community Resources
- Recreation Inclusion Opportunities
- Special Education Overview
- SSI/SSDI and Medicaid waiver
- Successful PCS Transitions
- Early Intervention Overview
- Managing Deployments
- Building Networks of Support
- Establishing Permanent Dependency
- Service Animals

EDUCATIONAL WORKSHOPS

Interactive workshops about navigating EFMP

■ Topics offered:

- PCS Transitions for the Highly Impacted Family
- Enrollments, Disenrollments and Updates
- Individualized Education Plans and more!



LEADERSHIP/UNIT TRAINING

Educational training about EFMP for Leaders and Units

■ Topics offered:

- CGRI Inspection Overview and Training,
- CGRI Site Assist Visits
- 101 Days of Summer
- Unit Family Days
- Back in the Saddle
- Quality Unit Representative Training
- Resource Tables

RECREATIONAL WORKSHOPS

Recreational workshops in an inclusive environment for all

■ Examples:

- Stress Relief Galaxy Jars
- Sensory Slime Making
- Laser Learning
- Color Run 5k
- Sensory Bin Play
- Bowling
- Home for the Holidays Gingerbread House Making
- Off-Base Mall and Konbini Tours/Walks
- FOCUS Family Mindfulness Training
- and more!





What is EFMP?

A Brief Introduction To

EXCEPTIONAL FAMILY MEMBER PROGRAM

The primary purpose of the USMC EFMP is to ensure continuum of care for eligible Marine Corps family members by identifying families with special needs and maximizing confidentiality and the provision of services to enhance their quality of life.

Enrollment Process

1. EFM is identified, enrollment form(s) are completed, and EFM brings forms to installation EFMP office
2. Family Case Worker submits forms to HQMC who determines eligibility and enrollment
3. Local installation assigns case to Family Case Worker



WHO IS ELIGIBLE

The Exceptional Family Member (EFM) must be enrolled in DEERS, MCTFS, and reside with the sponsor.

*Some exceptions apply



DD FORM 2792

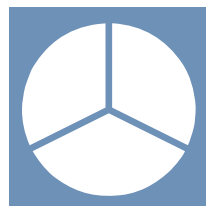
This form is the medical enrollment form that is required for EFMP. This form is completed by a Primary Care Provider.



BENEFITS

Assigned Family Case Worker, Assignment Coordination, Relocation Assistance, Workshops and Trainings, Support at IEP Meetings, Resources, and MORE!

This is a brief snapshot of our Family Training called "Introduction to EFMP." To gain the entire training or for more information, please contact EFMP Camp Butler utilizing the information below.



COMPONENTS OF EFMP

1. Identification and Enrollment
2. Assignment Coordination
3. Family Support



DD FORM 2972-1

This form, when appropriate, can be provided to EFMP and is an educational enrollment form. This form is completed by the school.

ACCESSING COMMUNITY RESOURCES

Having access to resources are important for both thriving individuals and resilient communities. This handout will help you identify an array of resources available to you in Okinawa, Japan such as, Marine & Family Programs, state and federal resources, and local resources. This infographic is a small portion of the family training 'Accessing Community Resources' by EFMP Camp Foster.



Additional Military and State Resources

- Food Stamps
- SSI
- Medicaid
- Military OneSource
- Navy Marine Corps
- Relief Society
- WIC
- Tricare
- And More!

Local Resources

For a comprehensive list of local resources visit EFMP Camp Butler installation offices for access to the Island Wide Resource Guide.

Family Care Programs

Exceptional Family Member Program
DSN 645-9237

- Educational Support
- Community Support
- Transition Support
- Resources & Referral
- Individual Case Work

Children & Youth Programs
DSN 645-4117

- Child Development
- Centers (CDC)
- Family Child Care
- Youth Centers
- Summer Camps and Recreation

School Liaison Officer Program
DSN 645-3205

- School Transition Support

Behavioral Health Programs

New Parent Support Program
DSN 645-0396

Community Counseling Center
DSN 645-2915

Family Advocacy Program
DSN 645-2915

FOCUS Project
DSN 645-6001

Substance Abuse Counseling Center
DSN 645-3009

Sexual Assault & Prevention Response
DSN 645-2134

Personal and Professional Development

Transition Readiness Program
DSN 645-3151

Education Assistance
DSN 645-7160

Family Member Employment Assistance
DSN 645-5074

Relocation Assistance
DSN 645-2104

Personal Financial Management
DSN 645-2104

Libraries
DSN 645-7178



BUILDING NETWORKS OF SUPPORT

A healthy support network is vital for everyone.

Let's learn how to build one together. A great support network is comprised of informal and formal support networks. This infographic is a part of the Family Training 'Building Networks of Support' provided by EFMP. To gain access to the entire brief or to gain more information contact EFMP Camp Foster.

Informal Networks

Informal networks include people who are a part of the family's social network like family members, friends, neighbors, co-workers or members of a faith-based community. Take a moment to reflect upon who your informal support networks are.

Formal Networks

Formal networks are typically individuals in the family's life from organizations or agencies that provide help or a service to a family. Each base has different formal networks. There are a few listed below. Can you think of any more?

Get Connected

- Join a cause
- Join a class
- Volunteer
- Walk your dog
- Go out with friends
- Reach out to professionals
- Contact EFMP
- Get out with your family



Exceptional Family Member Program

efmp@okinawa.usmc-mccs.org
DSN 645-9237



Neighborhood Pantry Camp Butler

neighborhoodpantrycb@gmail.com
Camp Foster Building 445



Families OverComing Under Stress

okinawa@focusproject.org
DSN 645-6077



Marine Corps Family Team Building

www.mccsokinawa.com/mcftb
DSN 645-3689



Family Advocacy Program

fapprevention@usmc.mil
DSN 645-2915



MCCS Child & Youth Program

www.mccsokinawa.com/cyp
DSN 645-4117

EARLY INTERVENTION

WHAT IS IT?

Early intervention is a system of services that helps infants and toddlers with developmental delays or disabilities.

IFSP	Individualized Family Support Plan	IEP	Individualized Education Plan
■ Birth to 3 Years		■ 3+ Years	
■ Intended to support children & families		■ Intended to support children	
■ Assesses present level of development		■ Assesses present levels of educational performance and developmental participation	



Contact the Camp S.D. Butler EFMP Installation office for any questions or comments

2-4 Months

- Coos/Babbles
- Smiles
- Holds head up
- Acknowledges sound

6-12 Months

- Rolls over
- Responds to name
- Shows curiosity
- Recognizes faces

18 Months

- Knows several words
- Eats with a spoon
- Shows affection

2 Years

- Follows simple instruction
- Says short sentences
- Begins to run

3 Years

- Shows concern
- Can name a friend
- Completes small puzzles
- Climbs

HUMS, ERD & TOUR CURTAILMENT

HUMANITARIAN ASSIGNMENT

Purpose

Provides temporary relief to Marines facing severe hardships that can be resolved within 36 months. The primary goal is to allow Marines to address short-term, critical issues while maintaining their commitment to service.

Administrative Process

- Submit requests directly to the Commandant of the Marine Corps (CMC)
- Include a detailed description of the problem, how a transfer would help, and the estimated time needed for resolution
- Provide documentation such as physician's statements, notarized support letters, and information about family members needing assistance
- The immediate commander must endorse the request, analyze the situation, and recommend action

TOUR CURTAILMENT

Purpose

To enhance stability for Marines and their units and to offset the costs associated with overseas moves, Marines shall serve the tour lengths for which they are assigned. While the nature of military service may require the transfer of Marines before completing their prescribed tours, such actions will be kept to the absolute minimum. Curtailments may be granted on a case-by-case basis by the CMC (MMEA/MMOA as appropriate), provided that is the only recourse available and is clearly in the best interest of the Marine Corps.

Administrative Process

- Submit requests directly to the Commandant of the Marine Corps (CMC)
- Include a detailed description of the problem, how a transfer would help, and the estimated time needed for resolution
- Provide documentation such as physician's statements, notarized support letters, and information about family members needing assistance
- The immediate commander must endorse the request, analyze the situation, and recommend action

The HUMS (Humanitarian Assignment) and ERD (Early Return of Dependents) programs aim to address severe personal or family hardships experienced by Marines. These measures ensure that Marines can manage critical situations without compromising their duty. Please reference MCO P1300.8R.

Overview

Favorable Conditions

Terminal illness, Life expectancy less than 6 months, Member of Marine or spouse, immediate family, presence of the Marine is required, Illness, Member of Marine or spouse's immediate family, Attending physician certifies Marine's presence is needed, Well-being or welfare of the patient, No other relatives capable of insisting

Qualifying Criteria

- The hardship must be severe due to the Marine's enlistment or reenlistment
- The Marine must have exhausted all other means to resolve the problem
- The situation should be resolvable within a specified time frame and must involve immediate family members

EARLY RETURN OF DEPENDENTS

Purpose

Facilitates the early return of dependents to the continental United States (CONUS) when family circumstances necessitate such action, ensuring dependents' well-being and the Marine's ability to focus on duty.

Administrative Process

- Ensure all supporting documentation is complete
- Visit the Installation Personnel Administration Center (IPAC) to set up dependent travel and complete necessary audits to update entitlements.
- Complete travel claims after dependents have traveled.
- Base housing arrangements must be secured before dependents' arrival.



Learn more about HUMS, ERD, and
Tour Curtailment at DSN 645-9237 or
efmp@okinawa.usmc-mccs.org

GUIDE TO MANAGING DEPLOYMENTS

1



Prepare for Deployment

Speak with your EFMP case worker, arrange legal and financial matters (POA, Guardianship), organize child care, and research respite care options.

2



Develop Communication Plans

Help your child understand the upcoming deployment. Communicate with your child's teachers, therapists, family and friends. Engage your Unit Deployment Readiness Coordinator.

3



Establish a Routine

Create rituals, listen to videos or recorded messages from the deployed member, create a deployment calendar and simplify daily schedules to provide stability.

4



Emotional Adjustment

Understand that feelings of sadness are normal. Build networks of support, simplify your life, engage in more self-care, and avoid watching the news. Help your child share and process their feelings.

5



Access Resources

TRICARE, EFMP, Military OneSource, Child Development Centers, Yellow Ribbon Reintegration Program, Personal Financial Management, New Parent Support Program and many more!

SUCCESSFUL PCS TRANSITIONS

for the EFMP Family

STEP

1

90 Days Before:

- Family ensures paperwork is up to date
- Family Needs Assessment and Family Service Plan Conducted
- Family Case Worker (FCW) shares information with gaining installation FCW

STEP

2

30 Days Before:

- FCW from gaining installation introduces themselves to the family

STEP

3

Departure:

- Losing installation FCW alerts the gaining installation FCW that the family has departed

STEP

4

Arrival:

- Family checks-in to the installation EFMP and their assigned FCW
- The EFMP case is transferred in the system
- FCW contacts the Marine and provides assistance as needed

Additional Helpful Resources:

- Military OneSource - EFMP and Me, Plan my Move, Relocation Tool, Special Needs Moving
- Lincoln Military Housing
- Military Child Education Coalition
- Military Youth on the Move Book: Moving Day by Robert Kalan



PERMANENT DEPENDENCY

THE INCAPACITATED DEPENDENT PROGRAM

What it is

This program is designed for dependent children to receive ID card privileges and medical benefits due to a mental or physical incapacitation

Eligibility

- Dependent child who relies on sponsor for more than 50% of his/her financial support
- Under the age of 21 (or 23 if full time college student)
- Incapable of self-support due to a mental or physical incapacity that existed prior to the 21st birthday (Or 23rd if enrolled as a full time student)
- Biological children if the incapacitation occurred prior to the age of 21
*adopted & step children if the incapacitation occurred prior to the age of 21 and while a dependent of the requesting sponsor
- Continuous incapacitation condition

Required Documentation

- Birth Certificate (if not enrolled in DEERS)
- Parent's marriage certificate (if not enrolled in DEERS)
- Completed DD Form 137-5
- A NAVMC 10922
- A written statement from an attending physician certifying that the mental or physical incapacitation occurred prior to age 21 and renders the child incapable of self-support
- A letter from the school registrar reflecting enrollment as a full-time student when incapacitation occurred



Learn more by scanning here or contacting
EFMP at efmp@okinawa.usmc-mccs.org

SURVIVOR BENEFITS PLAN

What it is

This program is a DOD sponsored and subsidized program that will pay your surviving spouse a monthly payment to help make up for the loss of your retirement income

Beneficiary Categories

- Spouse Only
- Former Spouse Only
- Spouse/Former Spouse & Child
- Child Only
- Disabled Dependent
- Natural Interest Person

Required Documentation

- A written statement of the decision to have the annuity paid to the SNT
- Attorneys Special Needs Trust Certification
- Name and tac ID number for the SNT by or before the time your beneficiary applies for their annuity

Special Needs Trust

What it is

The amendment of public law 113-291 gave military members and retirees the option to direct payment of a Survivor Benefits Plan Annuity for a dependent child to this trust. A SNT is a legal instrument specifically designed for the benefit of a person with a disability. In some cases, this may preserve the beneficiary's eligibility for other federal or state benefits.

RECREATION INCLUSION OPPORTUNITIES

Rehabilitation Act of 1973 prohibits discrimination on the basis of disability in programs conducted by Federal Agencies. This infographic is a small part of the family training "Recreation Inclusion." For more information contact Camp Butler EFMP.

WHAT IS INCLUSION?

Inclusion is conveying an attitude of acceptance, value, and welcome regardless of ability level. It is offering the same choices and opportunities for all. Inclusion is a barrier free environment.



WHO BENEFITS FROM INCLUSION?

Individuals with disabilities, Exceptional Family members, Individuals with impairment, Temporary Conditions, Nondisabled population, differing learning styles, elderly, wounded warriors, and everyone else!

WHAT INCLUSION MAY LOOK LIKE?

Wider aisles so individuals can move around easily, picture schedules so those with language delays can follow the routine, adaptive crayons and scissors made for people with motor delays, technology to aid with vision or hearing problems.



RESPITE CARE OVERVIEW



3

Level of Need (LoN) 3

Includes EFMP family members of all ages, with severe special needs that require trained support from qualified providers to maintain the health and safety of the EFM.



LoN 3 Reimbursement Rate of Care

- 1 EFM- Not to exceed \$18 per hour max
- 2 EFM- Not to exceed \$32 per hour max

20
HOURS

Up to 20 hours of respite care per month, per family

4

Level of Need (LoN) 4

Includes EFMP family members of all ages (including adults), with profound special needs who require skilled care services as documented by qualified providers, to maintain the health and safety of the EFM.



LoN 4 Reimbursement Rate of Care

- 1 EFM- Under no circumstances will care exceed \$45 per hour
- 2 EFM- Under no circumstances will care exceed \$60 per hour

32
HOURS

Up to 32 hours of respite care per month, per family

The Exceptional Family Member Program (EFMP) initiated the Respite Care Reimbursement Program in 2008. It is intended to reduce stress on sponsor families by providing temporary rest periods. It is available for EFMs identified as Level of Need (LoN) 3 or 4.

Common Questions

How is LoN determined?

HQMC EFMP

LoN is determined by HQMC EFMP Medical Screeners during the enrollment or update eligibility review by using an evidence-based process. After the documents are reviewed the LoN is resolved.

May be used for:

Date night, Hair Cut, Lunch with a Friend, Take a Nap, Go to the Gym

May not be used for:

Pay for Preschool, Pay for therapy sessions or therapeutic recreation, supplement day care or babysitting to allow sponsor or spouse to work or attend school

How to get more information:

Contact EFMP

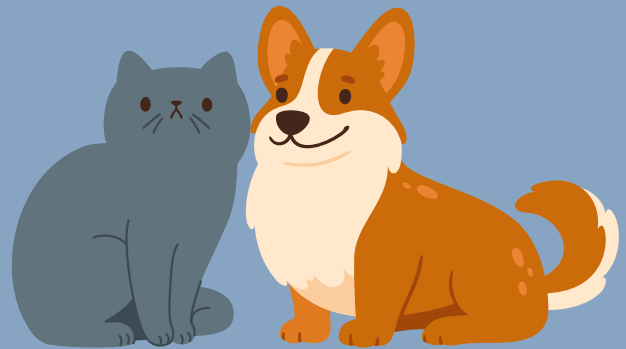
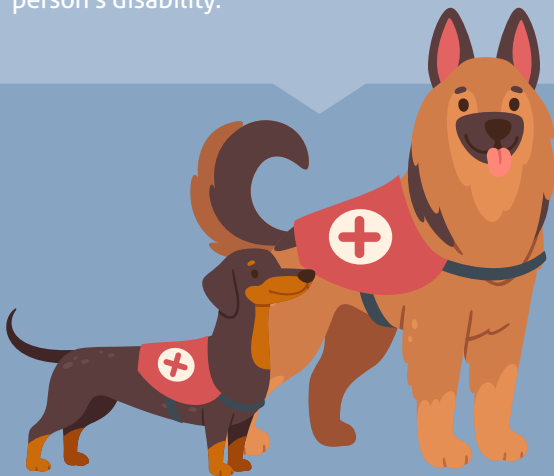
This infographic is a part of the EFMP Family Training titled "Respite Care." For more information or to receive the entire brief email EFMP Camp Butler at efmp@okinawa.usmc-mccs.org, call DSN 645-9237, or visit the EFMP Office Camp Foster in building 495 Suite 100.

SERVICE ANIMALS VS THERAPY ANIMALS

Understanding Key Differences and Regulations

WHAT IS A SERVICE ANIMAL?

A dog or a miniature horse that has been individually trained to do work or perform tasks for an individual with a disability. The task(s) performed by the dog or miniature horse must be directly related to the person's disability.



WHAT IS A THERAPY ANIMAL?

A therapy animal, also referred to as comfort animal or emotional support animal, is a term used to describe an animal that provides comfort just by being with a person. The animal has not been trained to complete a specific job or task.

INSTALLATION REGULATIONS

Only Service Animals are recognized with policies outlined in MCO 1700.39 Banned Breeds Include: Pitbull terriers, Rottweilers, Wolf hybrids, and other breeds with dominant aggressive traits.

*Waivers may be requested for accredited service animals of banned breeds.

PCSING WITH YOUR SERVICE ANIMALS

- Flights: Service animals may accompany you if certain criteria are met. For example, proper notification of travel; presenting documents, etc.
- Hotels: Allowed without extra cleaning fees unless damage occurs.

OCONUS Travel: check quarantine exemptions and verify airline and lodging requirements.

KEY THINGS TO REMEMBER

Service animals must be harnessed, leashed, or tethered, unless it interferes with their tasks. Staff may ask **only the two following questions**: Is the animal required due to a disability and what task(s) has it been trained to perform.

SPECIAL EDUCATION OVERVIEW



Every Child Succeeds Act of 2015

Reauthorize national
education law



Americans with Disability Act of 1990

Prohibits disability-based
discrimination nationwide



Section 504 of the Rehabilitation Act of 1973

Ensures equal access for
disabled individuals

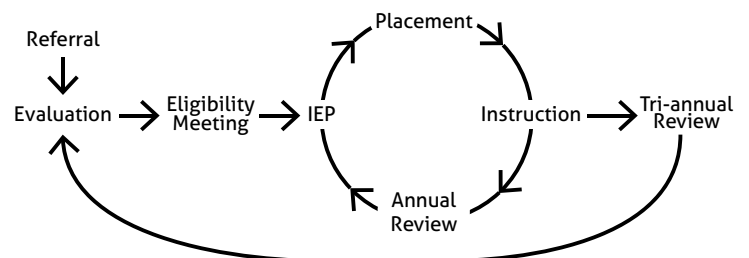


Individuals with Disabilities Act of 2004

Regulates special
education and services



THE SPECIAL EDUCATION CYCLE



Is your sister service EFMP family registered with the Marine Corps EFMP?

Enhance your support in Okinawa by registering with the Marine Corps today.

Here are some guidelines of the different steps involved and the resources available.



THE CAMP BUTLER EFMP (USMC) INSTALLATION OFFICE

Service members seeking to be included in the MCCS EFMP sister service should reach out to the Camp SD Butler Installation office to initiate the process.

HQMC EFMP

Only HQMC EFMP can create a sister service case and add it to the USMC installation office database. HQMC EFMP may request documents such as DD Form 2792, DD Form 2972-1, or IEP to confirm EFMP eligibility.

ONGOING SUPPORT

Sister service families will be contacted quarterly by the MCCS EFMP Installation office. Families will be provided with the benefit of newsletters, the calendar of free events, and other items of interest.

KEY TAKEAWAYS

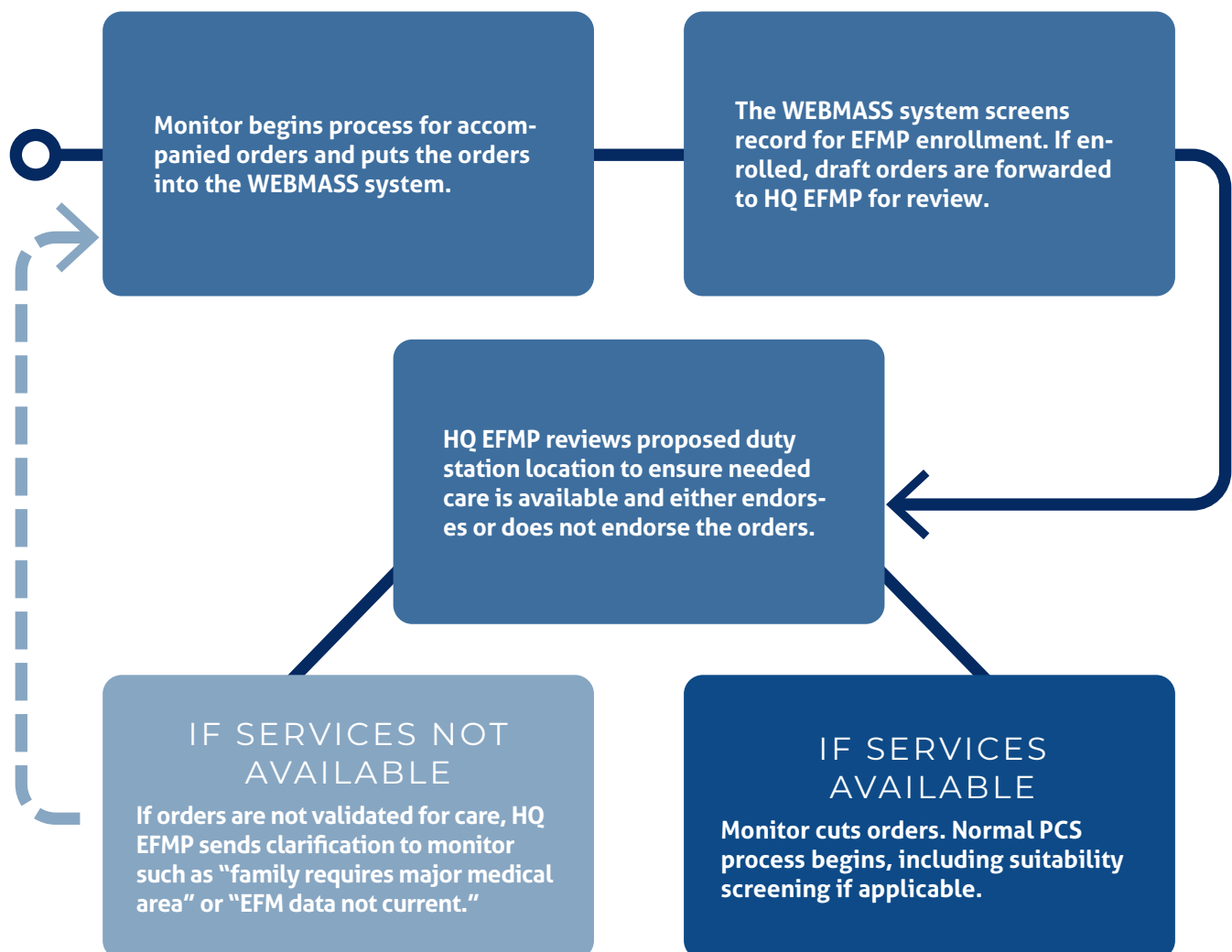
Marine Corps can provide your sister service family with the following:

- Family education and training
- Accessibility to free events
- Resources specific to Okinawa
- Information and referral



ASSIGNMENT COORDINATION ROLE

The Exceptional Family Member Program is a mandatory enrollment program (per MCO 1754 Series). This is especially critical when a sponsor is considered for accompanied assignments where the provisions for services may be limited—whether it is a CONUS to CONUS or a CONUS to OCONUS assignment. An understanding of this process will better help families understand the role of EFMP.



ROLES AND RESPONSIBILITIES

THE CAMP S.D. BUTLER OFFICE

DOES

- Case Management through Family Case Worker
- Support Groups and Special Needs Forums
- Local Resources, Activities and MCCS Programs
- Support during PCS Moves and Deployments
- Assistance in obtaining EFMP enrollment documents
- Family training by Subject Matter Experts
- Representation at Child and Youth Programs' Inclusion Action Team Meetings

DOES NOT

- Validate PCS assignments for the availability of care at the gaining installation
- Determine Level of Need for EFMP Respite Reimbursement Program

HQMC OFFICE

DOES

- Reviews initial and updated EFMP enrollments
- Determines Level of Need for EFMP Respite Reimbursement Program
- Reviews for architectural/environmental housing considerations
- Reviews for priority housing consideration
- Reviews PCS assignments to ensure the availability and accessibility of required medical and educational care

DOES NOT

- Offer case management support
- Direct or select assignments. All orders, including requests for Humanitarian Assignment, Tour Curtailment, and Early Return of Dependents are a function of Manpower (MMEA/MMOA)

INSTALLATION OFFICE

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HQMC

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