Job Aid – Future Dated Tasks

Objective

The goal of this job aid is to provide instructions for when and how to create a Future Dated Task.

Overview

Interface tasks and reports are used to identify many types of case maintenance. However not all case maintenance can be identified in this manner. There are many instances where an action must be taken in the future and neither a report nor a task is produced. In these instances future dated tasks are used.
A future dated task is one which is manually created by the user with the due date set to correspond to when action needs to be initiated (as opposed to when the task is due to be completed).

Process

1. **Identify if a Future Task is Needed**

   The following chart lists reasons for creating a Future Task. If other reasons are discovered, let training department know so list can be updated.

Reason Needed	Set Due Date	Examples
Future EDBC Needs Run	The date the come up month becomes available	• Stop the Medicare Part B as an expense against share of cost after processing an application. • Stop allowing a one-time medical expense against share of cost after having reduced LTC liability for the come-up month.
Monitor Temp Stay	Three days before the temp stay ends	• Individual in independent living enters an institution for temp stay • HCBS recipient enters institution for a temp stay
End Coverage	The date the come up month becomes available	• Medikan Reintegration is limited to the month of discharge and two following months unless good cause granted
Monitor payment/appeal status of SSA/SSI	1st of the sixth month	• Check payment status (by requesting new TPQY) every 6 months following PMDT denial. • Check appeal status (by requesting new TPQY) every 6 months following Unfavorable SSA Decision
Monitor Resource Limit	15th of the 8th month of the resource exemption	• Lump Sum SSA/SSI payments are exempt for 9 months following the month received
Spousal Impoverishment	• Date on which forms must be received • The 90th day	• Required forms (Intent to Transfer Resources & Notice of Intent to Allocate Income) must be returned within 10 days • Transfer of resources must be completed within 90 days unless good cause granted

Reason Needed	Set Due Date	Examples
TOP Penalty	Set for when come-up month available for the last month of the penalty period (or month after the penalty period as needed)	• To authorize LTC payments for the month the TOP penalty ends and the following month.
6 month WKH review falls within a TUP period	1st of the sixth month of WKH eligibility.	• The 6 month WKH review can be completed without the targeted review form being received if the consumer is still unemployed.

2. **Manually Add a Task**
   In the context of the case, manually add a task. Enter:
   a. **Due Date** – as shown in chart above
   b. **Received Date** – today's date
   c. **Region** – KDHE Clearinghouse
   d. **Location** – KanCare Clearinghouse
   e. **Queue** – E&D or LTC (Based on Worker ID assigned to program block)
   f. **Task –** Contact/Info Change

   > **NOTE:** The 'Contact Info Change' task has been re-purposed and will now be the task used when creating Future Tasks. Previously, the 'Contact Info Change' contact reason was used for changes in phone numbers or e-mail addresses. These changes may be entered using 'Demographic Changes' contact reason.

   g. **Task Details** – FD (for future dated) – followed by reason shown above – followed by description of what needs done. Beginning the task with FD will allow for easy reporting of these tasks.
   Example: FD *– Monitor Payment/Appeal Status of SSA/SSI – Request new TPQY at 6 months to monitor if consumer is in appeal status. If application remains pending or in appeal status, add new future task. If a 'final determination by SSA' has been reached and is unfavorable, deny Medicaid due to not meeting disability requirements.*
3. **End Process**