Kansas Eligibility Enforcement System (KEES)

Medical Eligibility

Data Collection – Financial Information

Medical Eligibility: Data Collection - Financial Information

Introduction

The financial data collection pages are designed to:

- View, Edit, & Add the consumer's financial information.
- Capture specific information such as income sources, resources, Medicare, other health insurance information, and medical expenses

Medical Eligibility: Data Collection - Financial Information

Objectives

After completing this course, you will be able to:

- View, Edit, and Add:
  - Income Information
  - Resource Information
  - Expense Information
  - Tax Information
  - Medicare Information
  - Medical Subrogation Records
  - Third Party Other Health Insurance Information

Agenda

Lesson 1: Financial Page Navigation

Lesson 2: Income

Lesson 3: Resources

Lesson 4: Expenses

Lesson 5: Tax

Lesson 6: Medicare Expense

Lesson 7: Medical Subrogation

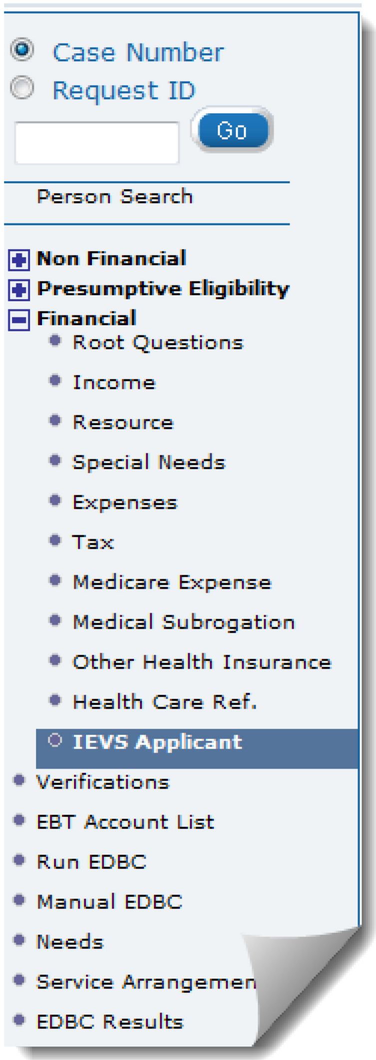
Lesson 8: Other Health Insurance

Medical Eligibility: Data Collection - Financial Information

Lesson 1: Financial Page Navigation > Introduction

The following pages are in the Financial section in the Task Navigation pane.

- Root Questions (not currently utilized)
- Income
- Resource
- Special Needs (not currently utilized)
- Expenses
- Tax
- Medicare Expense
- Medical Subrogation
- Other Health Insurance
- Health Care Referral (not currently utilized)
- IEVS Applicant (not currently utilized)

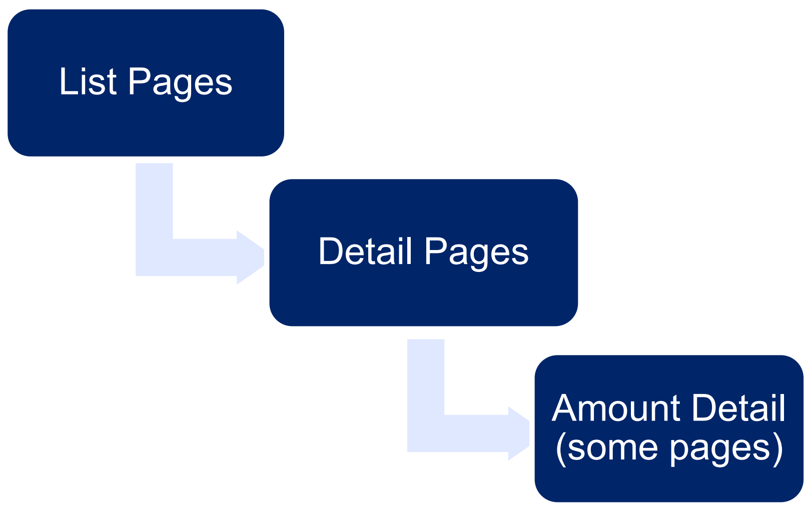


Medical Eligibility: Data Collection - Financial Information

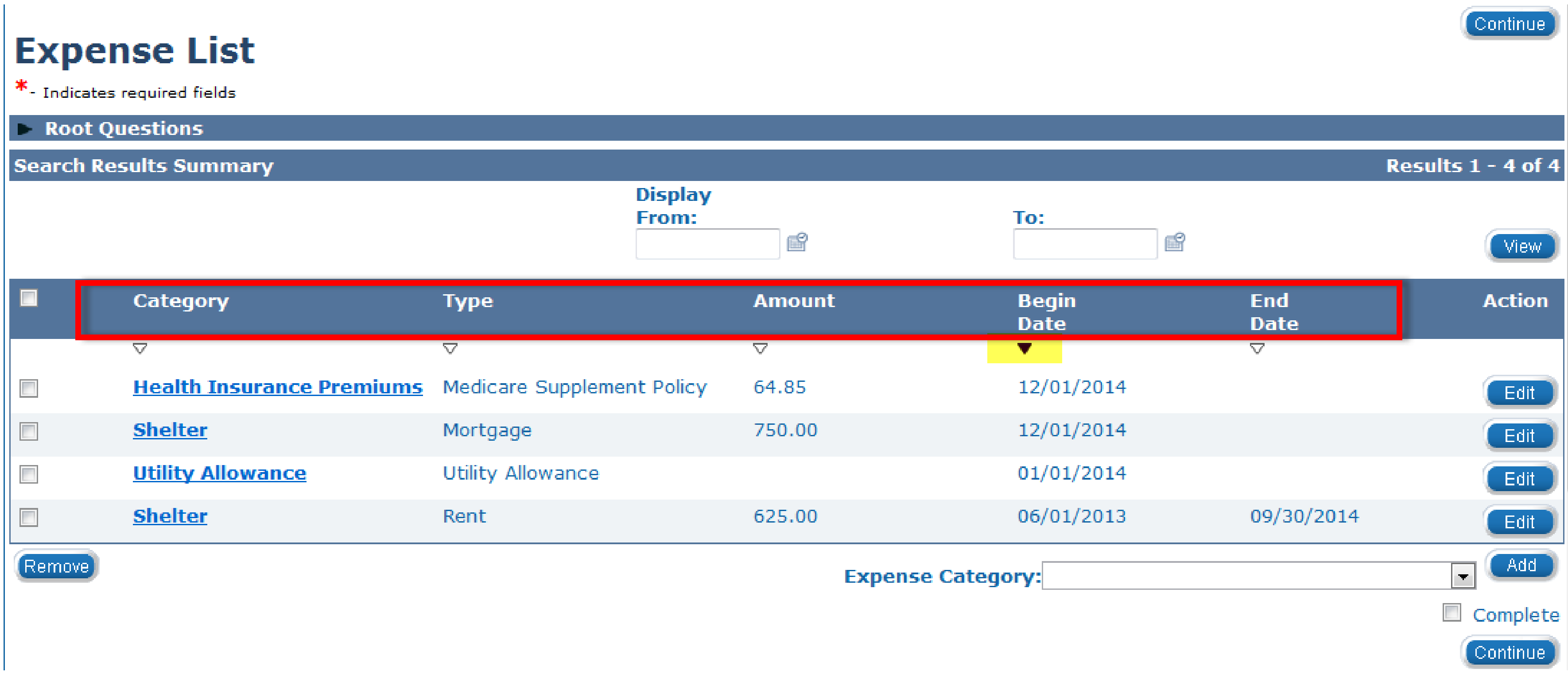
Lesson 1: Financial Page Navigation

On the financial pages, information is entered for each consumer listed on the case.

All pages follow the same flow:

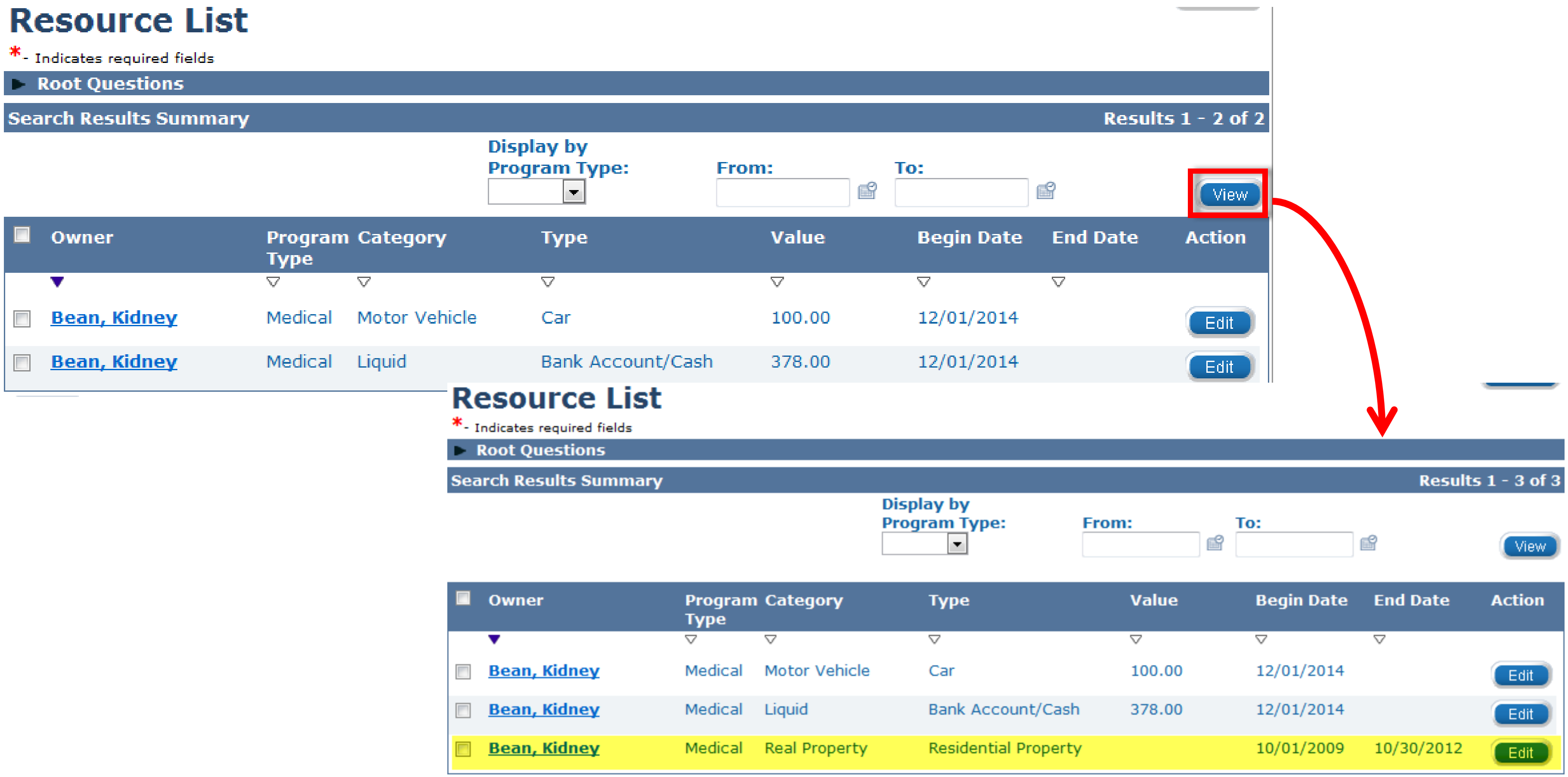


The **List** pages have built-in sort functionality. The filled in carrot below the heading will identify how the records have been sorted. To sort by one of the other headings, simply click the carrot.



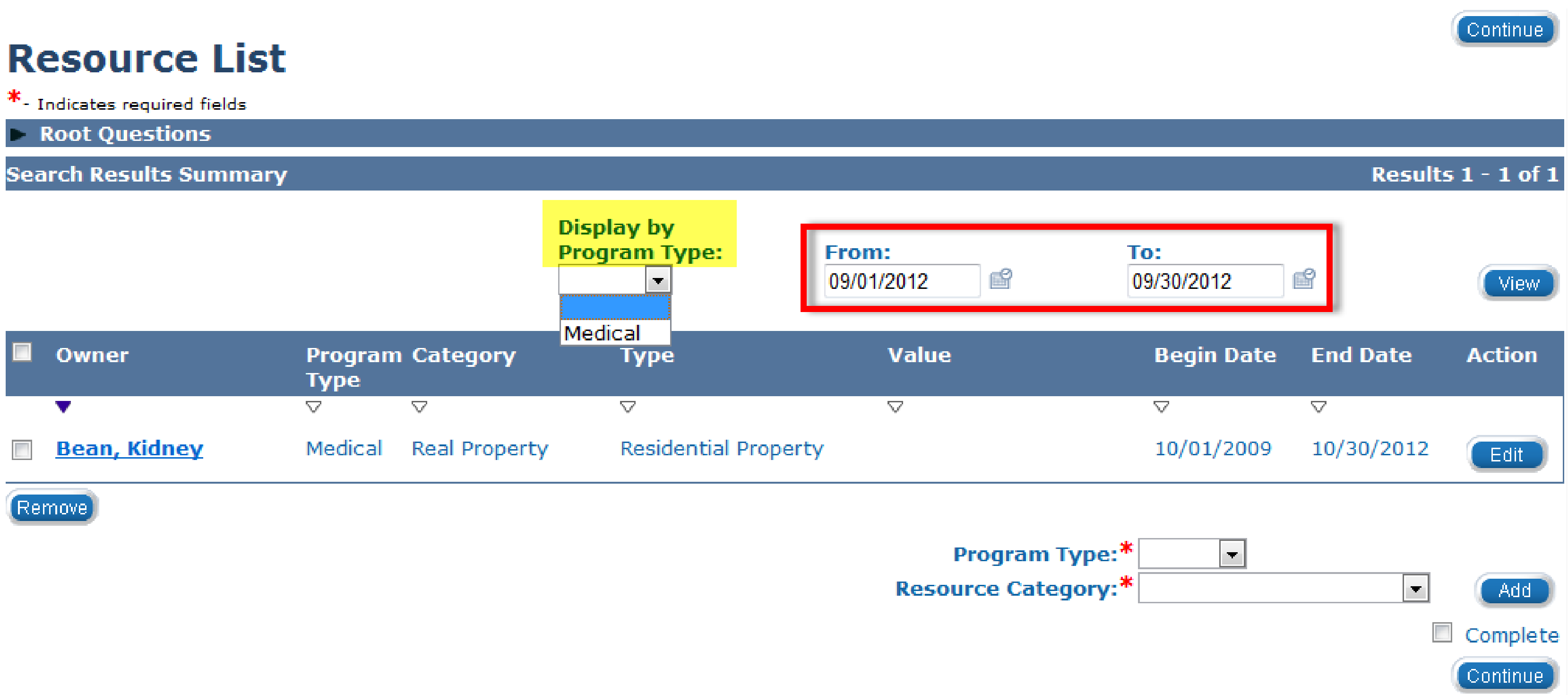
Expense & resource records with an **End Date** within the three prior months will display on the **List** pages. All income records, regardless of **End Date** will display.

Occasionally, it is necessary to view historical records. By clicking **View**, all records for the case/person will display.



To limit the number of records returned,
On the List page:

- Select the desired program from the **Display by Program Type** drop-down menu.
- Enter the desired date range in the **From** and **To** fields.
- Click **View**.



To view income, resource, and expense records:

On the List page:

- Select the Hyperlink of the record you wish to view:

Owner	Program Type	Category	Type	Value	Begin Date	End Date	Action
Bean, Kidney	Medical	Motor Vehicle	Car	100.00	12/01/2014		Edit
Bean, Kidney	Medical	Liquid	Bank Account/Cash	378.00	12/01/2014		Edit

Remove

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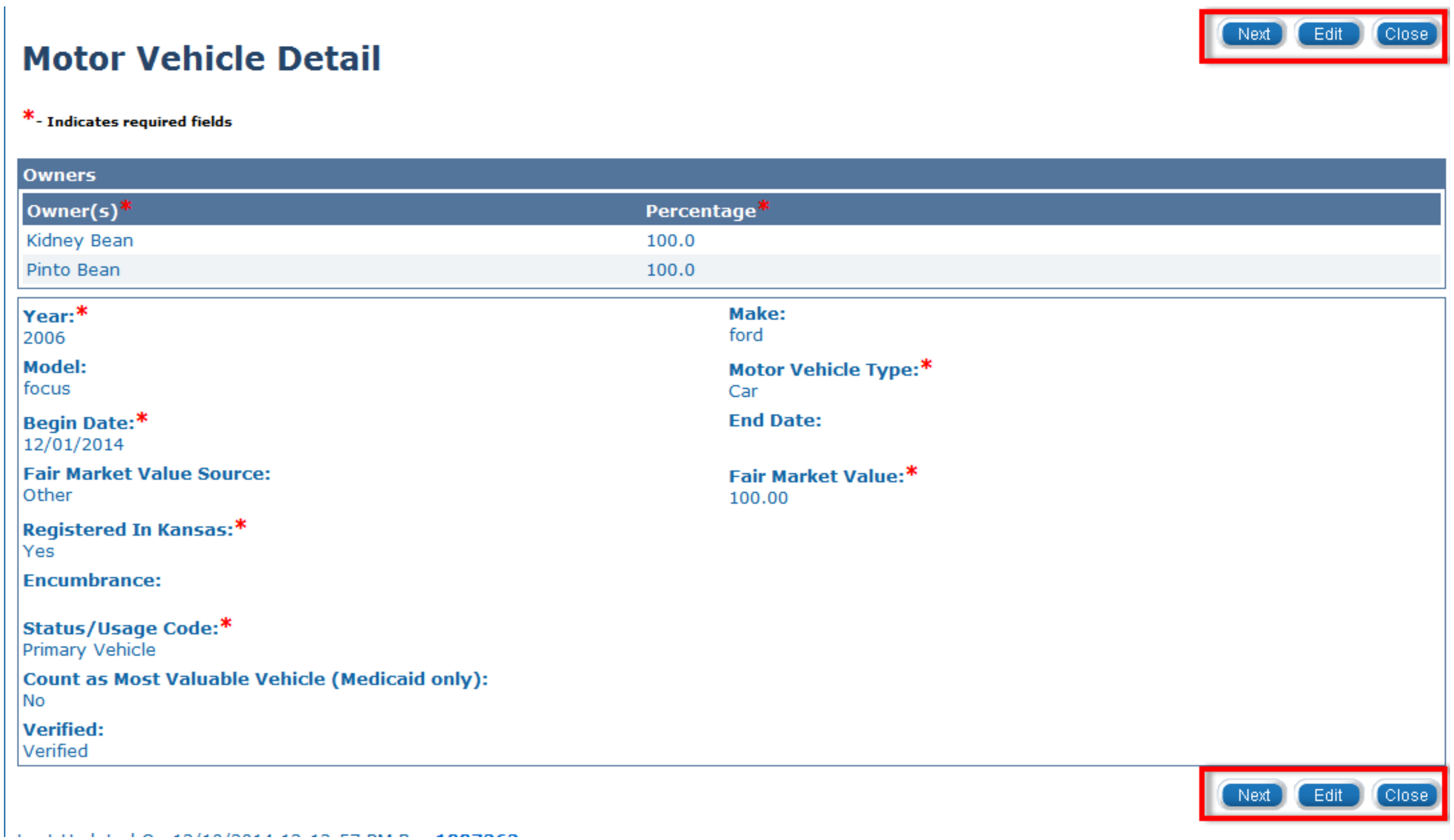
Lesson 1: Financial Page Navigation > Viewing a Record

This will take you to a view only **Detail** page. From this page you can view the record to ensure the information is accurate. The **Next** button will take you to the next record within that case. The **Edit** button will allow you to make changes to the record.



Next Edit Close

Motor Vehicle Detail

*- Indicates required fields

Owners

Owner(s)*	Percentage*
Kidney Bean	100.0
Pinto Bean	100.0

Year:* 2006

Make: ford

Model: focus

Motor Vehicle Type:* Car

Begin Date:* 12/01/2014

End Date:

Fair Market Value Source: Other

Fair Market Value:* 100.00

Registered In Kansas:* Yes

Encumbrance:

Status/Usage Code:* Primary Vehicle

Count as Most Valuable Vehicle (Medicaid only): No

Verified: Verified

Next Edit Close

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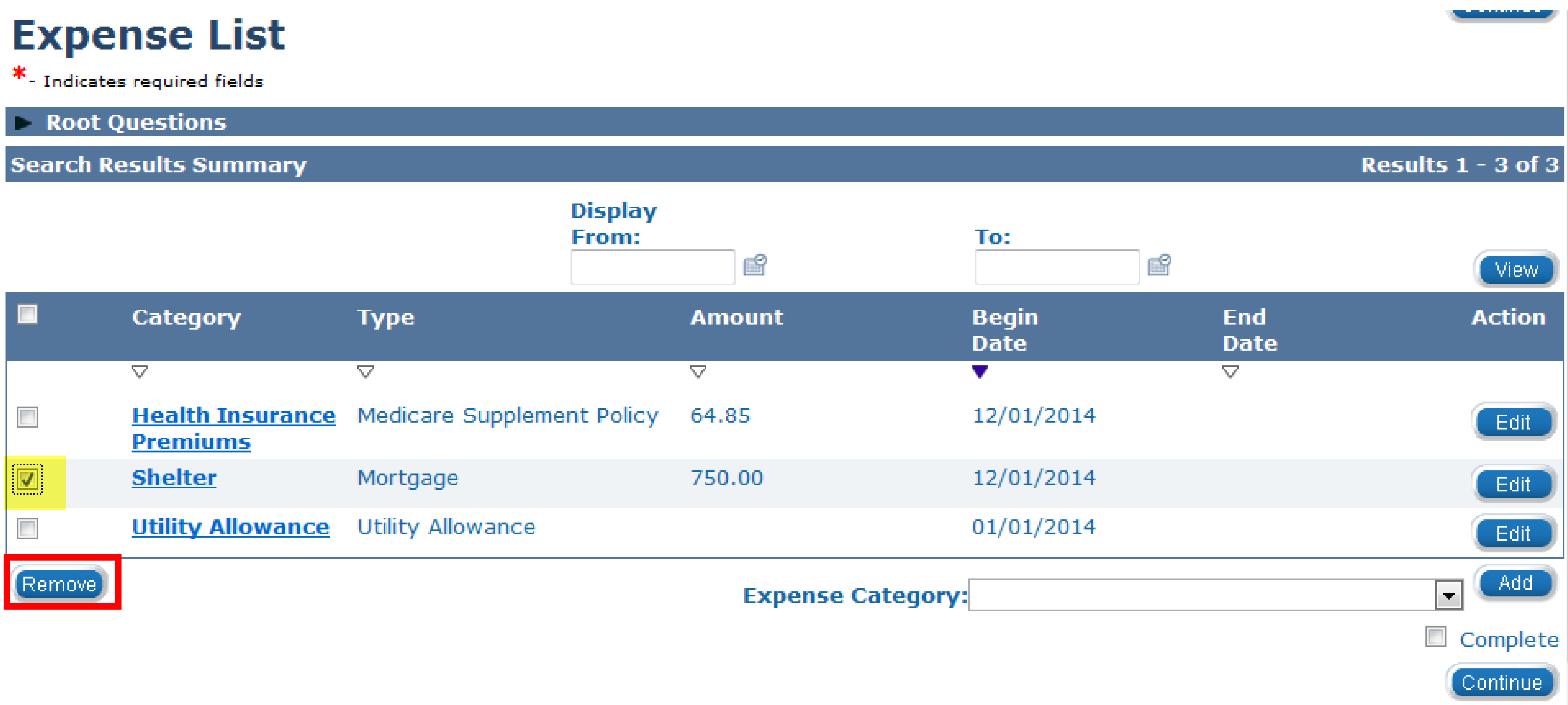
Lesson 1: Financial Page Navigation > Removing a Record

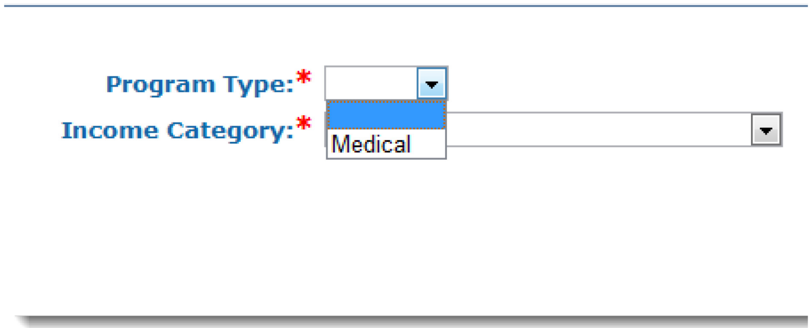
If a financial record is ending and should no longer be considered for eligibility, the **Remove** button should NEVER be utilized. In these instances, the record should be **End Dated**.



When adding records on the financial screens for Income, Resources, and Expenses, always remember:

- It is important to make sure the **Category**, **Type**, and **Description** selected for the financial data are accurate.
- The **Category, Type**, and **Description** determine whether an income, resource, or expense is countable or exempt for the medical program.

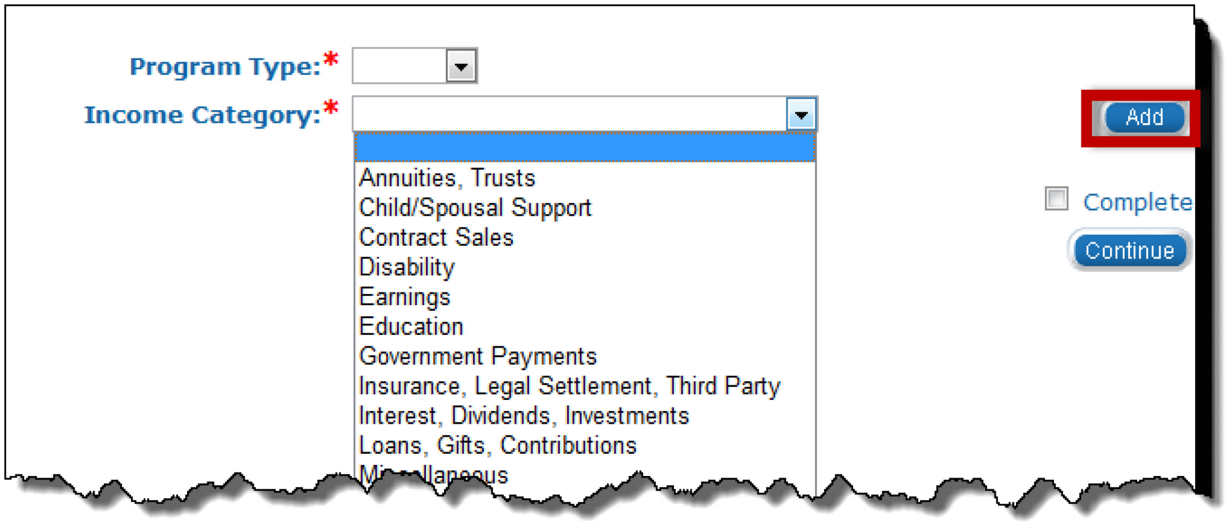
To **Add** new income, resource, and expense records:



On the List page:

- Select the **Program Type**:
  - Medical
    (for income and resources only)

- Select the **Category.**
- Click the **Add** button.



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Financial Changes are not uncommon for ongoing medical cases.

Many times consumers have changes to income, resources, and expenses that may or may not impact medical benefits.

For Family Medical, EDBC should be run to re-determine the eligibility using timely reporting guidelines if the consumer requests a change to a premium amount or spenddown due to a decrease in income or increase in expenses.

If information is reported timely and will have a negative impact on the case, the information should be recorded in KEES, but no EDBC should be ran.

For Elderly & Disabled, EDBC should be run using timely reporting/negative action guidelines.

In this lesson you learned:

- What information is captured on the financial pages
- How to sort & search financial records
- How to view financial records
- How to add financial records
- How financial changes impact the case & when to run EDBC

Medical Eligibility: Data Collection - Financial Information

Agenda

Lesson 1: Financial Page Navigation

Lesson 2: Income

Lesson 3: Resources

Lesson 4: Expenses

Lesson 5: Tax

Lesson 6: Medicare Expense

Lesson 7: Medical Subrogation

Lesson 8: Other Health Insurance

The Income pages capture all forms of income to use for determining eligibility and benefits.

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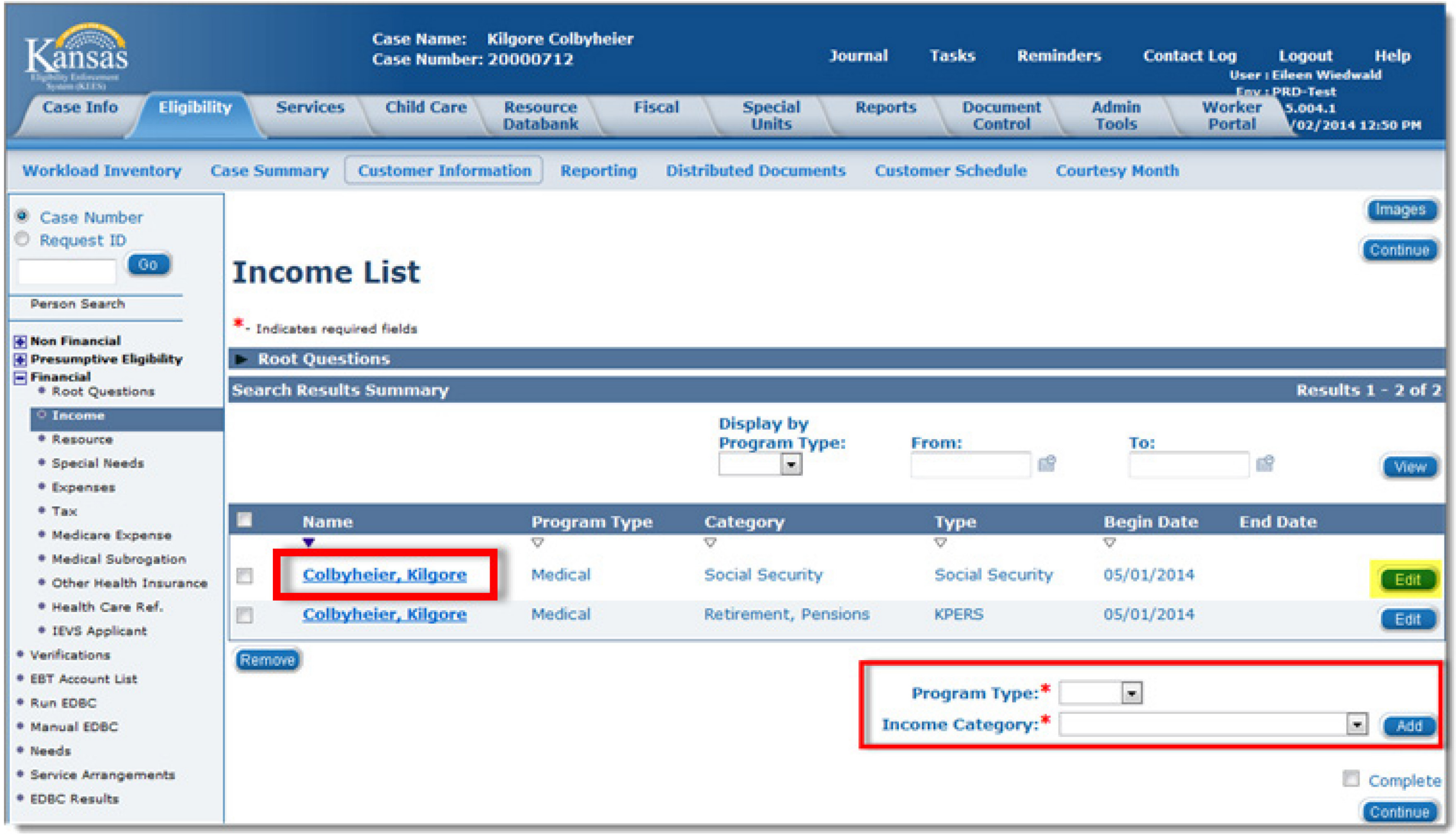
Lesson 2: Income > Income List Page

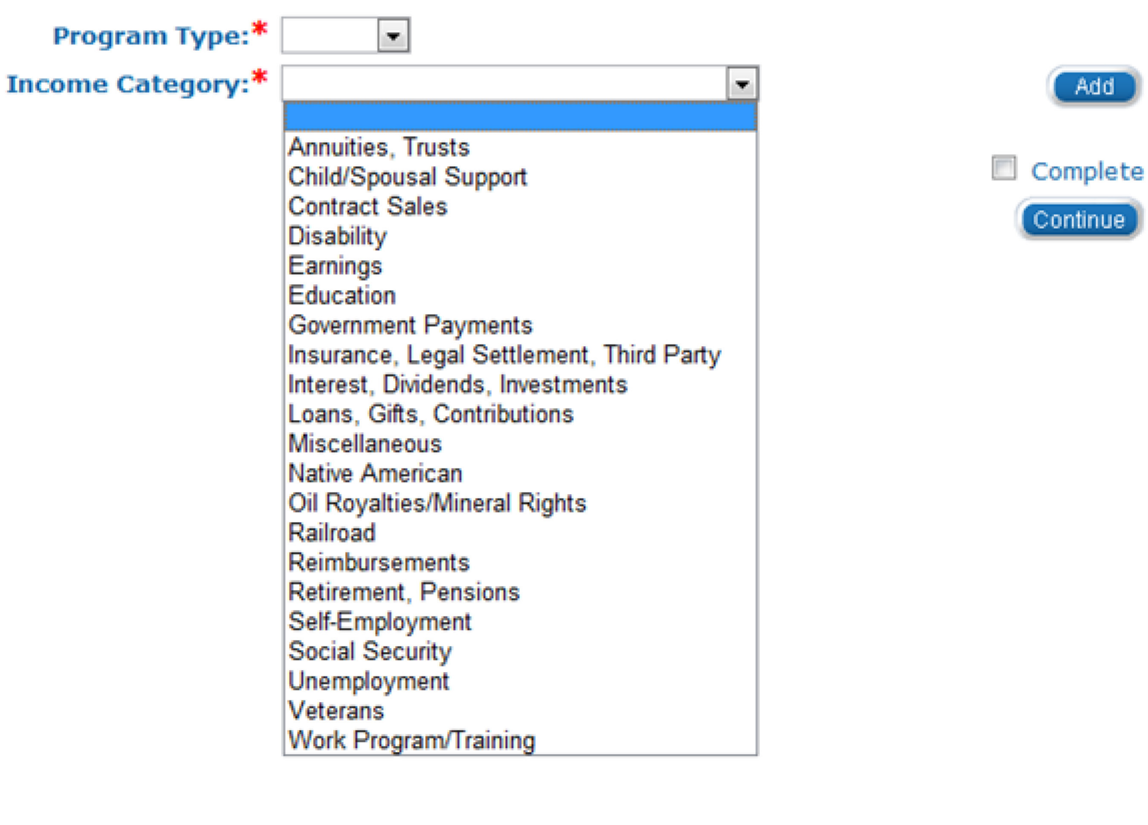


Once **Income** is selected on the Task Navigation, the **Income List** page appears. It is from this screen that income records can be viewed, edited, or added.

Medical Eligibility: Data Collection - Financial Information

Lesson 2: Income > Adding New Income

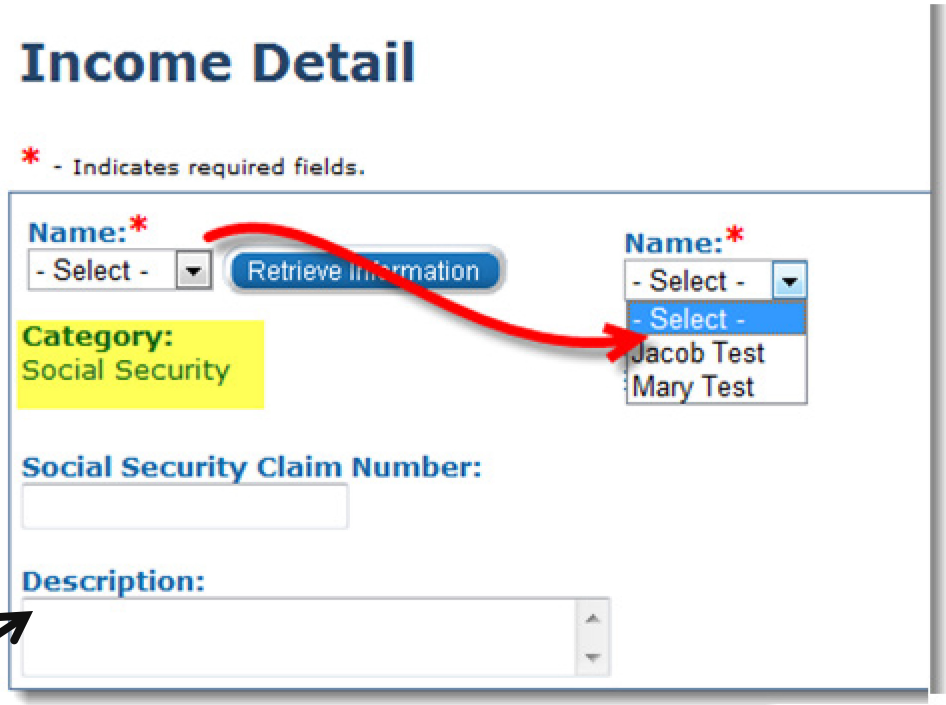
The **Income Category** drop-down includes:



Once an **Income Category** is selected, click the **Add** button to complete the **Income Detail** page.

On the Income Detail Page:

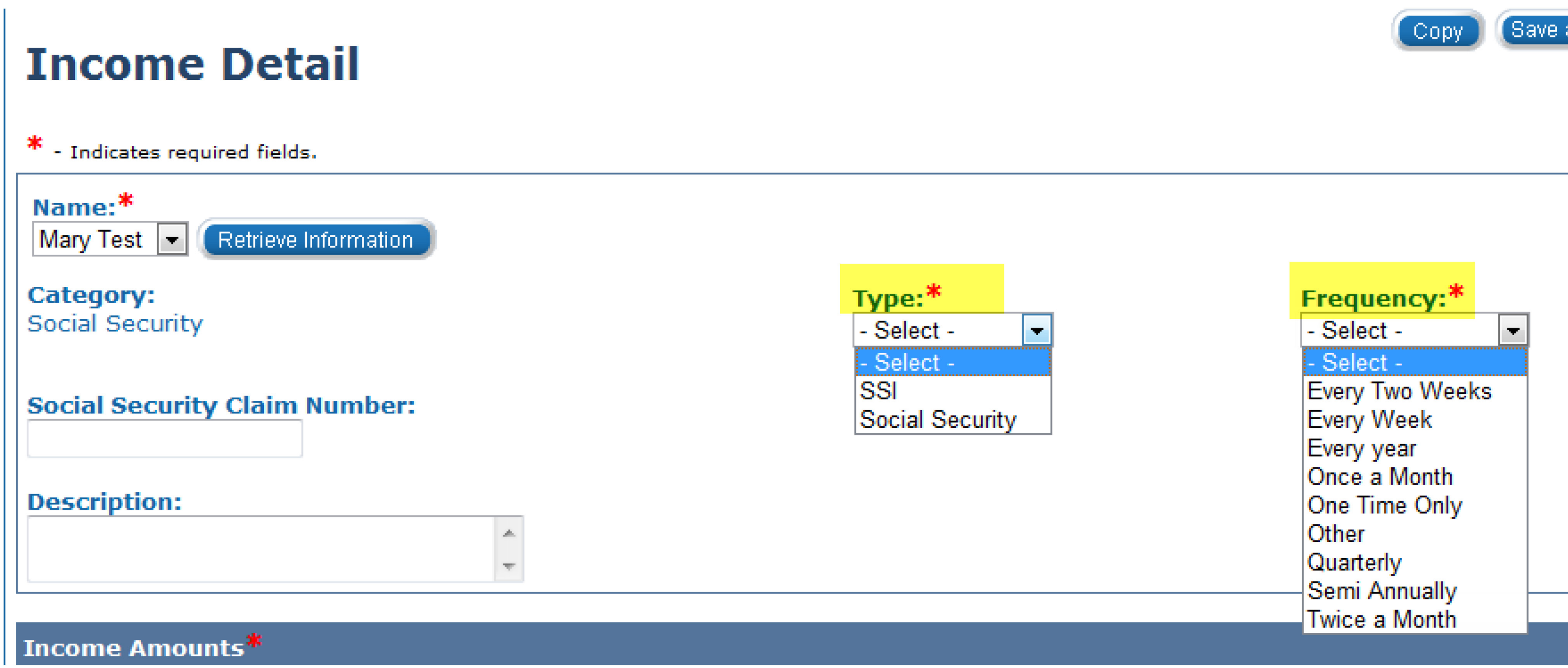
- Select **Name** of the person.
- **Category** is auto-populated from **Income List** Page.



Additional information can be added in the **Description** text box.

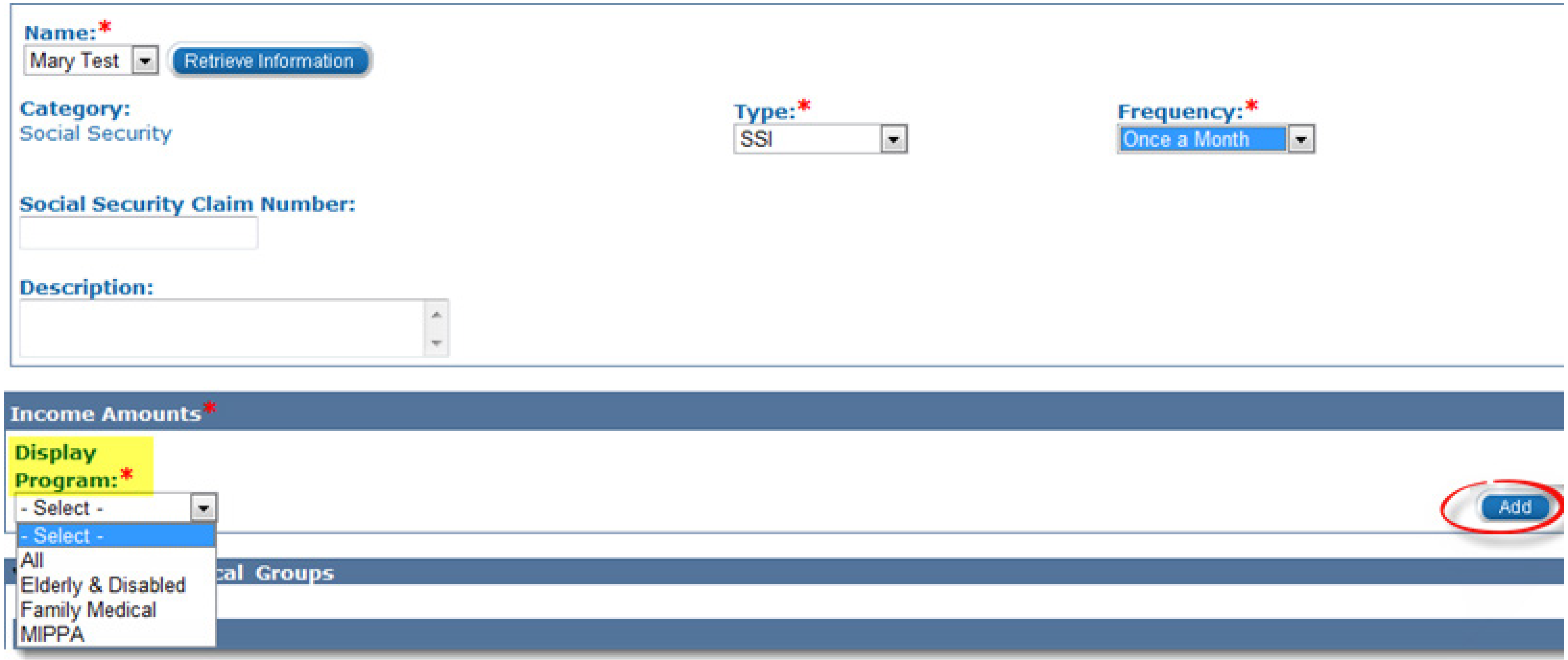
On the Income Detail Page:

- Select **Type** of income.
    - Drop-down is dependent on the income **Category**
- Select **Frequency** received.



On the **Income Detail** Page:

- Once all Detail information is entered:
  - Select **Display Program** from the drop-down menu.
  - After selection is made, the **Add** button will appear.



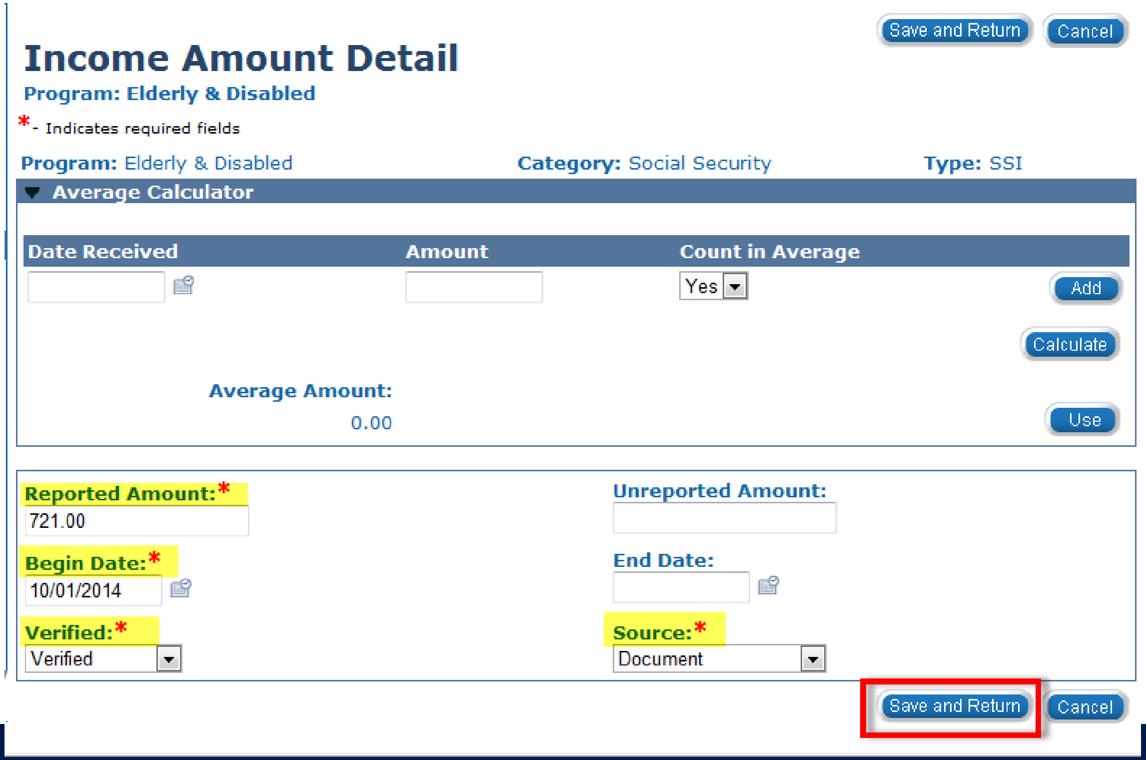
The **Income Amount Detail** page allows the user to enter the income amount(s) one of two ways.

- Entering the **Reported Amount**
  - This field should be used when the consumer is receiving the same income amount (without variability) month after month. (i.e., Social Security Income)

- Using the **Average Calculator**
  - This should be used when trying to calculate an average of varying incomes or when there are multiple income payments from the same source during one month. (i.e., Earnings, Child/Spousal Support)

On the **Income Amount Detail** Page (when the **Average Calculator** isn't needed):

- Enter the **Reported Amount**.
- Enter the **Begin Date**.
- Select **Verified** and select the **Source** used to verify income.
- Click **Save & Return**

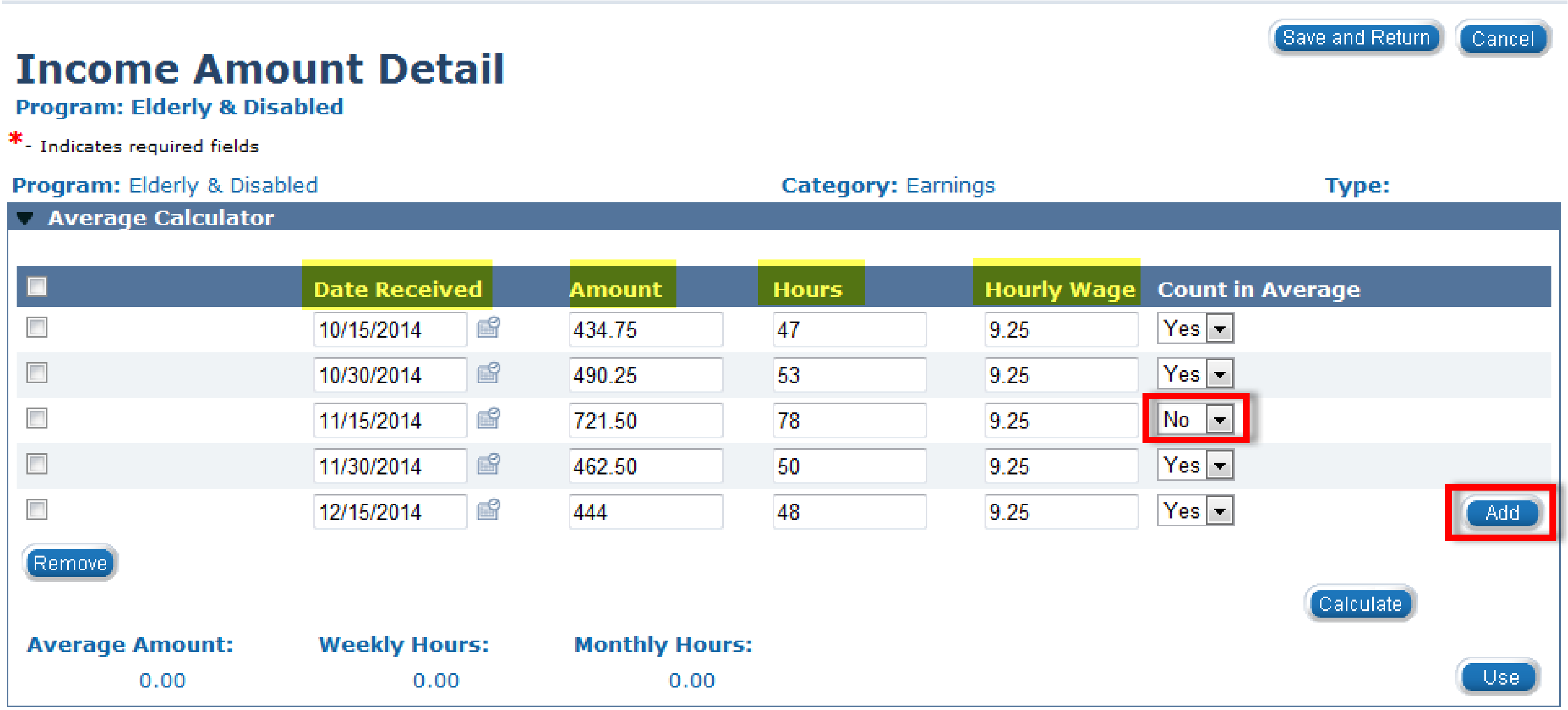


On the **Income Detail** Page (when utilizing the **Average Calculator)**:

The **Average Calculator** uses the **Frequency** drop-down box on the **Income Detail** page to determine the calculated amount.

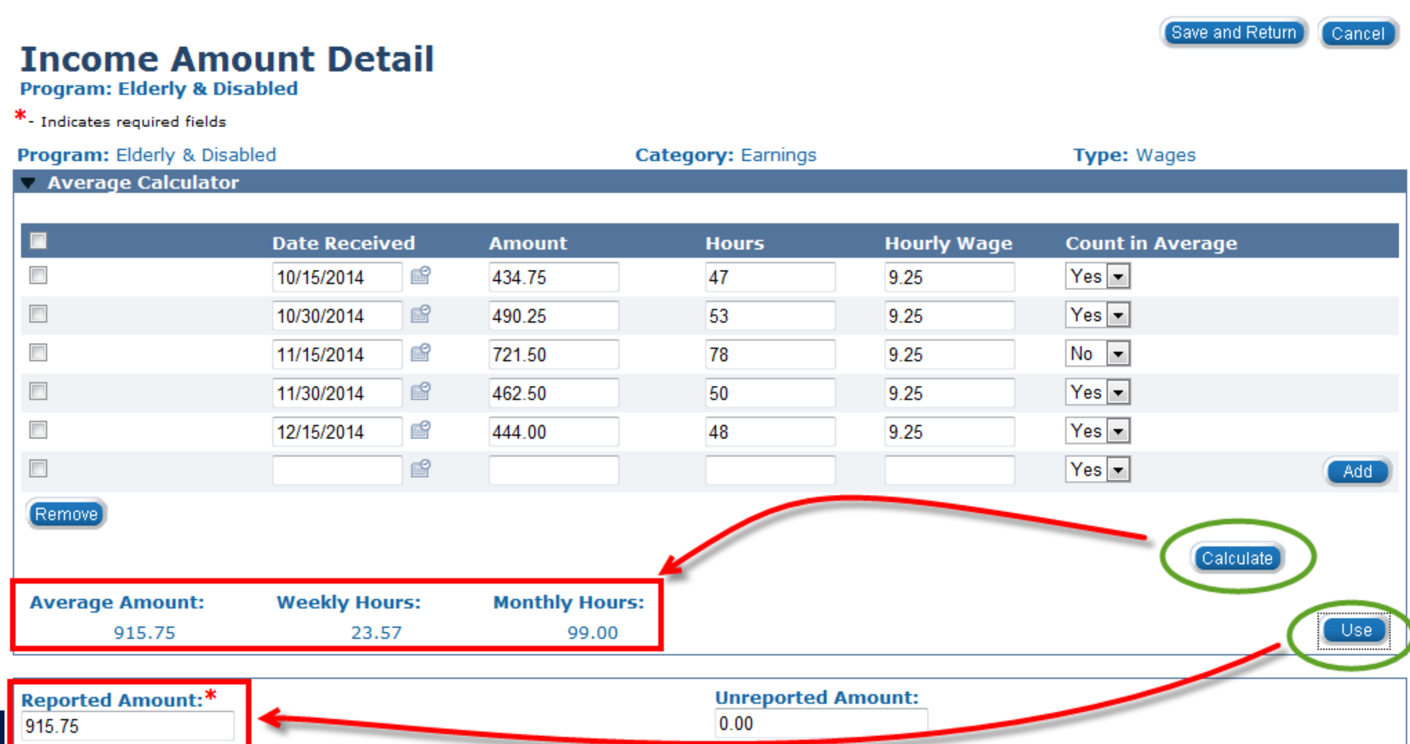
On the **Income Amount Detail** Page (when utilizing the **Average Calculator)**:

- Enter the **Date Received**, **Amount**, **Hours**, and **Hourly Wage**.
  - The **Count in Average** drop-down defaults to **Yes**. If the income entry is not representative and should not be counted in the average, select **No**.
- Click the **Add** button.



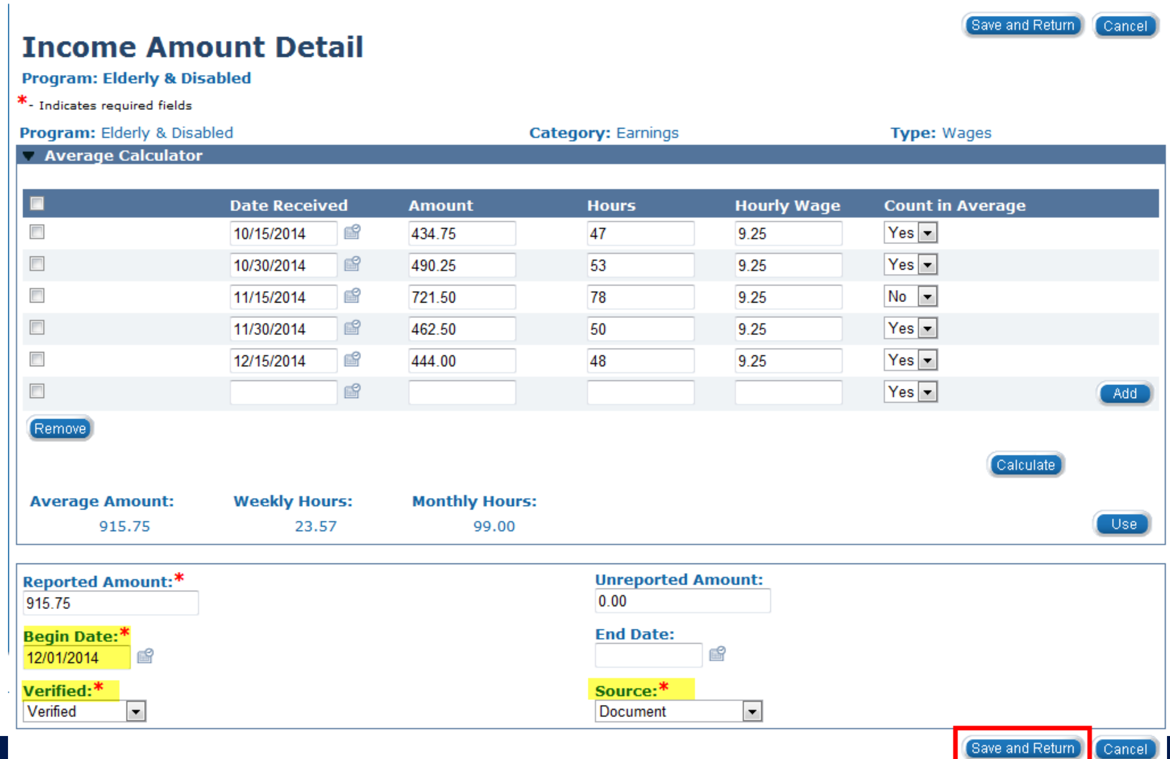
When using the **Average Calculator** for Earnings:

- Click **Calculate**.
  - The **Average Amount**, **Weekly Hours**, and **Monthly Hours** will populate.
- Click **Use**, if the displayed **Average Amount** is correct, to populate the **Reported Amount** field.



At the bottom of the **Income Amount Detail** page:

- Enter the **Begin Date**.
- Select **Verified** and select the **Source** used to verify income.
  - (We will look at source options on the next slide.)
- Click **Save & Return**



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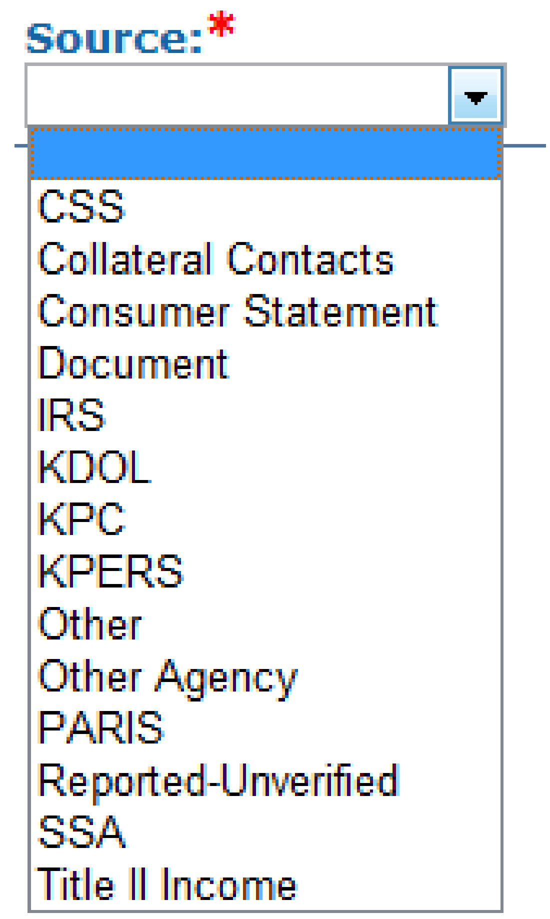
Lesson 2: Income > Adding New Income

The **Source** drop-down acronyms include:

- CSS – Child Support Services
- IRS – Internal Revenue Service
- KDOL – Kansas Department of Labor
- KPC – Kansas Pay Center
- KPERS – Kansas Public Employees Retirement System
- PARIS – Public Assistance Reporting Information System
- SSA – Social Security Administration
- Title II Income – SSA Income

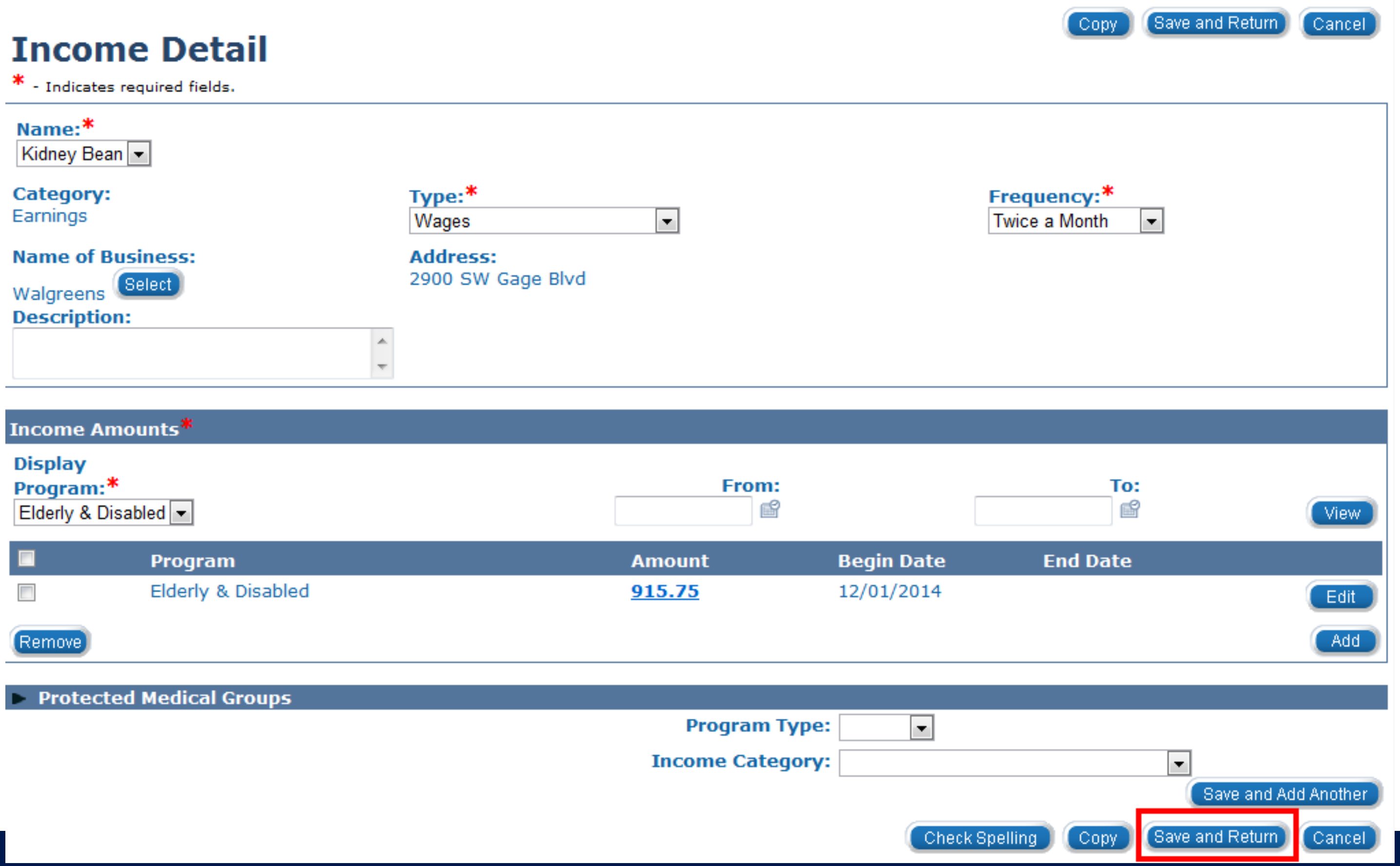


Medical Eligibility: Data Collection - Financial Information

Lesson 2: Income > Adding New Income

Once all income information is entered:

- Select **Save and Return.**
  - If there are additional incomes, select the **Program Type** and **Income Category** and click **Save and Add Another.**



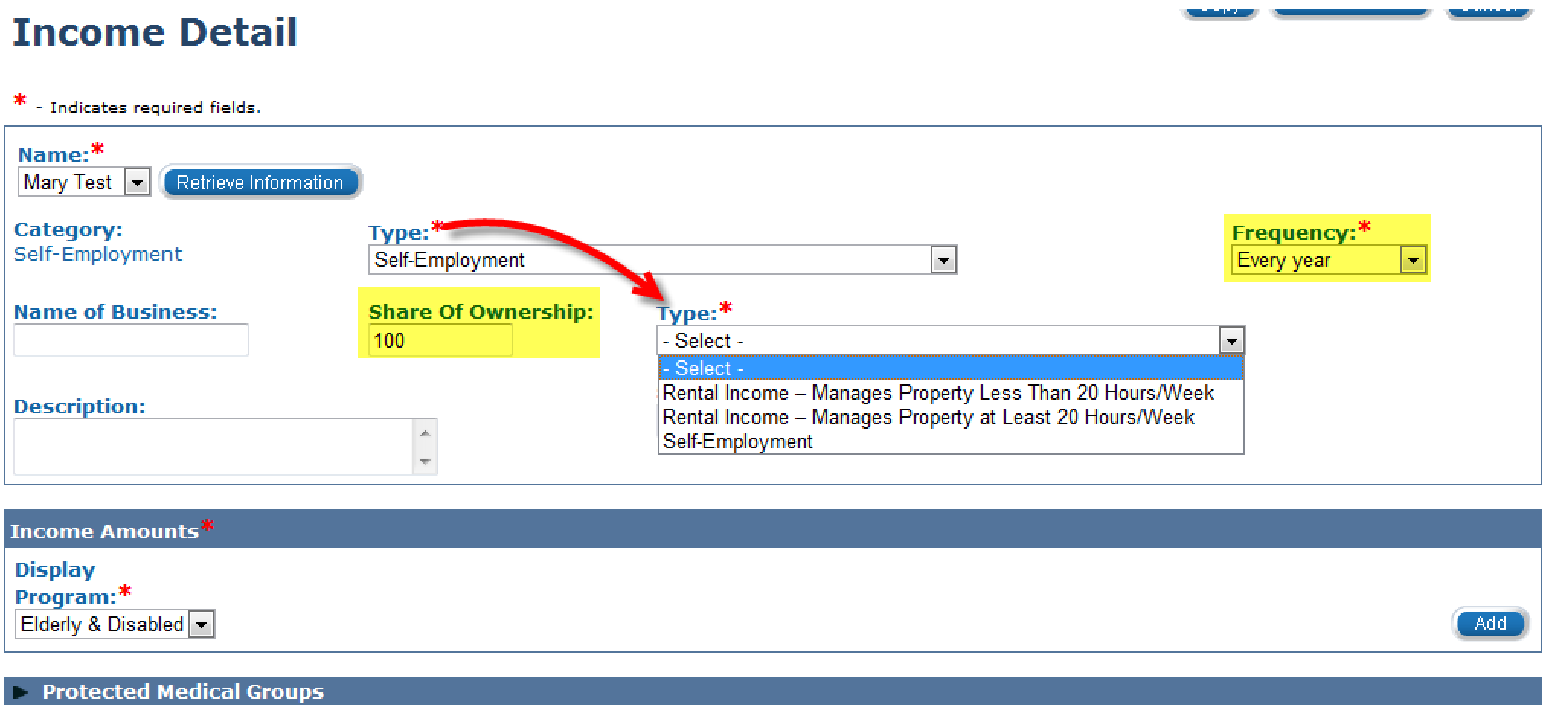
Many of the data entry fields are dynamic and different sections, drop-down selections, and categories appear based on the Income being entered. Some examples include:

- **Self-Employment**
  - Share of Ownership field appears and defaults to 100
- **Child/Spousal Support:**
  - Optional Person Paying fields appear
  - Frequency defaults to monthly
- **Social Security**
  - Protected Medical Group (PICKLE) questions only appear for this category
- **Unemployment**
  - "Unemployment Claim With" field appears with State drop-down menu which defaults to KS (this field is optional but best practice is to capture the data)

Medical Eligibility: Data Collection - Financial Information

Lesson 2: Income > Income Detail: Self-Employment

On the **Income Detail** page when entering Self-Employment:



Frequency selected should be based on the way the income is provided. For example, if they provided a tax return, you should select **Every Year.** If they provided the last three monthly ledgers, you should select **Monthly**.

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Lesson 2: Income > Adding Income: Calculator: Self-Employment

Save and Return | Cancel

Income Amount Detail

Program: Elderly & Disabled

*- Indicates required fields

Program: Elderly & Disabled **Category:** Self-Employment **Type:** Self-Employment

Average Calculator

	Schedule/Ledger	Total Gross Income	Income Addition	
☐	Schedule C/C-EZ	28,000.00		
☐				Add

	Schedule/Ledger	Total Expenses	Expense Exclusion	
☐	Schedule C/C-EZ	7,000.00		
☐				Add

Divisor: 12 Calculate

Average Amount: 1750.00

Use

Reported Amount:* 1750.00

Unreported Amount: 0.00

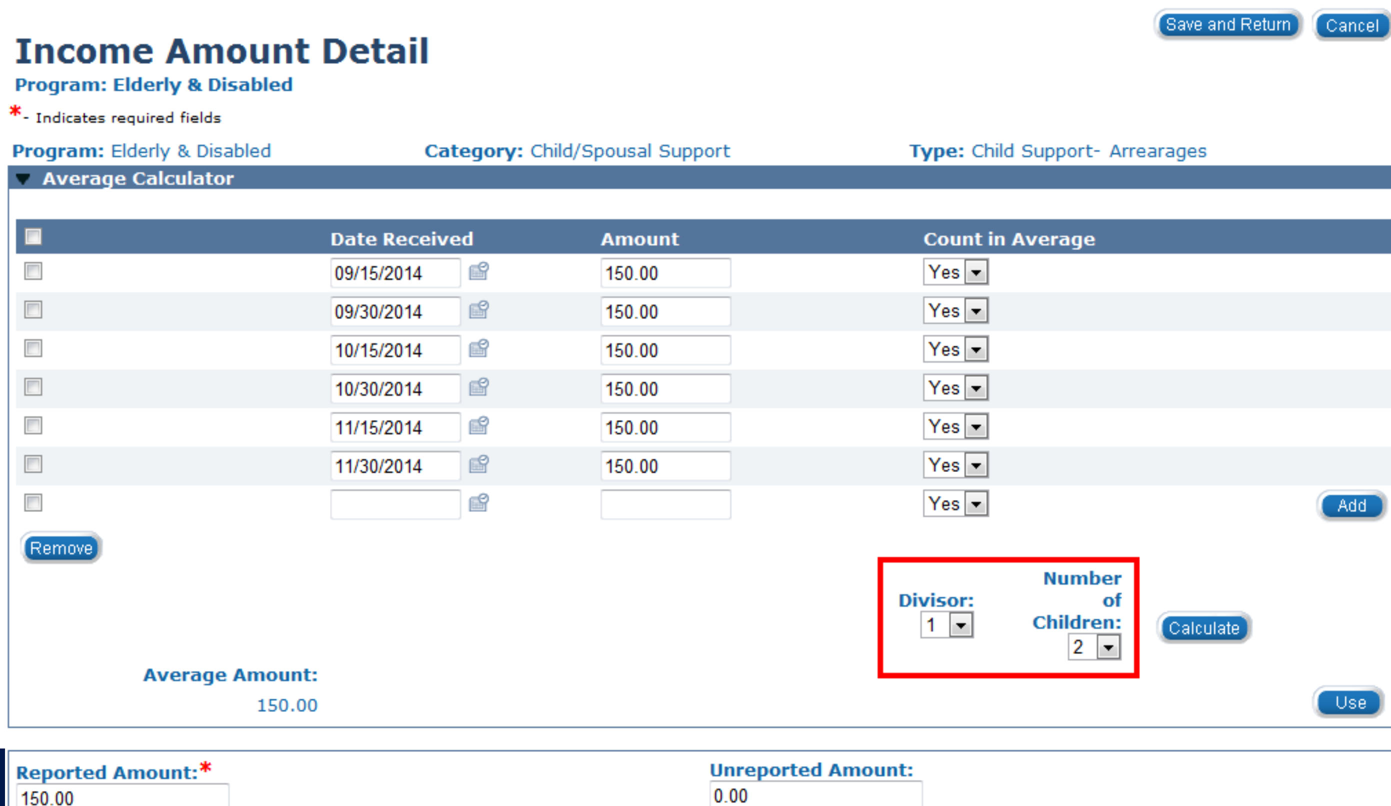
Divisor should be based on the number of months the income was entered for.

Medical Eligibility: Data Collection - Financial Information

Lesson 2: Income > Adding Income: Calculator: Child/Spousal Support

On the **Income Amount Detail** page (when entering Child/Spousal Support):

- Enter the **Date Received** and **Amount**.
- Select 1 from the **Divisor** drop-down.
- Select the appropriate **Number of Children** from the drop-down.
- Click **Calculate** and **Use**.



Medical Eligibility: Data Collection - Financial Information

Lesson 2: Income > Income Detail Page Pickle Questions

On the **Income Detail** page (when entering Social Security):

Protected Medical Groups

Pickle	
Since April 1977, has this person received or has been entitled to receive both RSDI and SSI in the same month?	No
Has this person been discontinued from SSI?	
Does this person reside in the household of another and pay rent above the minimum threshold amount?	No
Has this person received a RSDI COLA increase in any month since SSI was discontinued?	
Date eligible for and last received SSI:	
Date RSDI (Social Security) Benefits began:	

Disabled Adult Children	
Is this person at least 18 years of age and previously received SSI on the basis of blindness or a disability which began before the person reached age 22?	No
Has this person been discontinued from SSI as a result of the individuals becoming entitled on or after July 1, 1987 to Social Security child's benefits payable on the basis of a disability which began before age 22, or because of an increase in such childhood disability benefits?	No
Amount of Adult Disabled Child benefit in the month prior to the increase which caused loss of SSI:	

Qualified Disabled Widow/Widower	
Was this person entitled to OASDI for December 1983?	No
Was this person entitled to an OASDI widow or widower benefit for January 1984 based on disability?	No
Did this person become ineligible for SSI because of an increase in the OASDI widow or widower benefit because of the elimination of the reduction factor for widows or widowers who became entitled before age 60?	No
Has this person been continuously eligible for a widow or widower benefit since that increase?	No
Would this person be eligible for SSI currently if the amount of the increase and any subsequent cost-of-living increases were deducted from current income?	No

Early Widow/Widower	
Is this person receiving OASDI widow or widower's benefit under section 202I or 202(f) of the Social Security Act?	No
Is the person 60 years old or between the ages of 50 and 60 and are disabled?	No
Did the person lose SSI eligibility because they began to receive early widow or widower benefit?	No
Would the person be eligible for SSI currently if the amount of widow or widower benefits were disregarded?	No
Is this person not currently eligible for Medicare Part A coverage?	No

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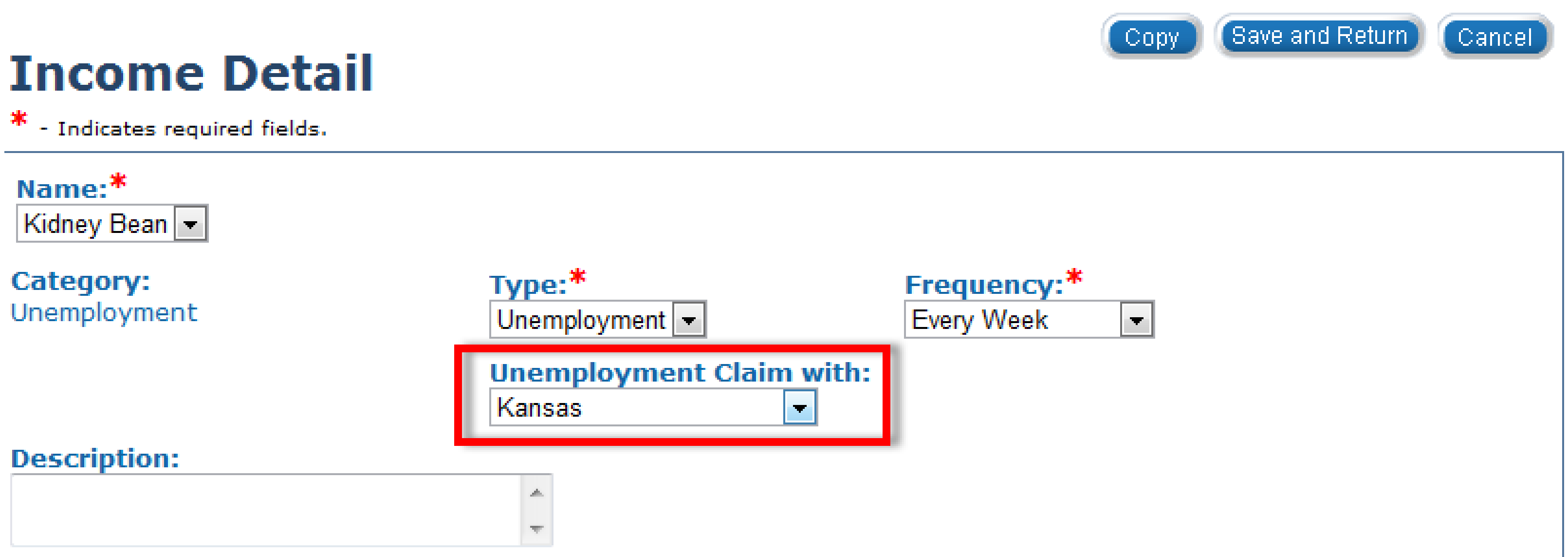
Lesson 2: Income > Income Detail Page Unemployment Fields

On the **Income Detail Screen,** when **Unemployment** was selected from the **Income Category** drop-down:

- **Unemployment Claim With** field appears with State drop-down menu which defaults to KS (this field is optional but best practice is to capture the data)

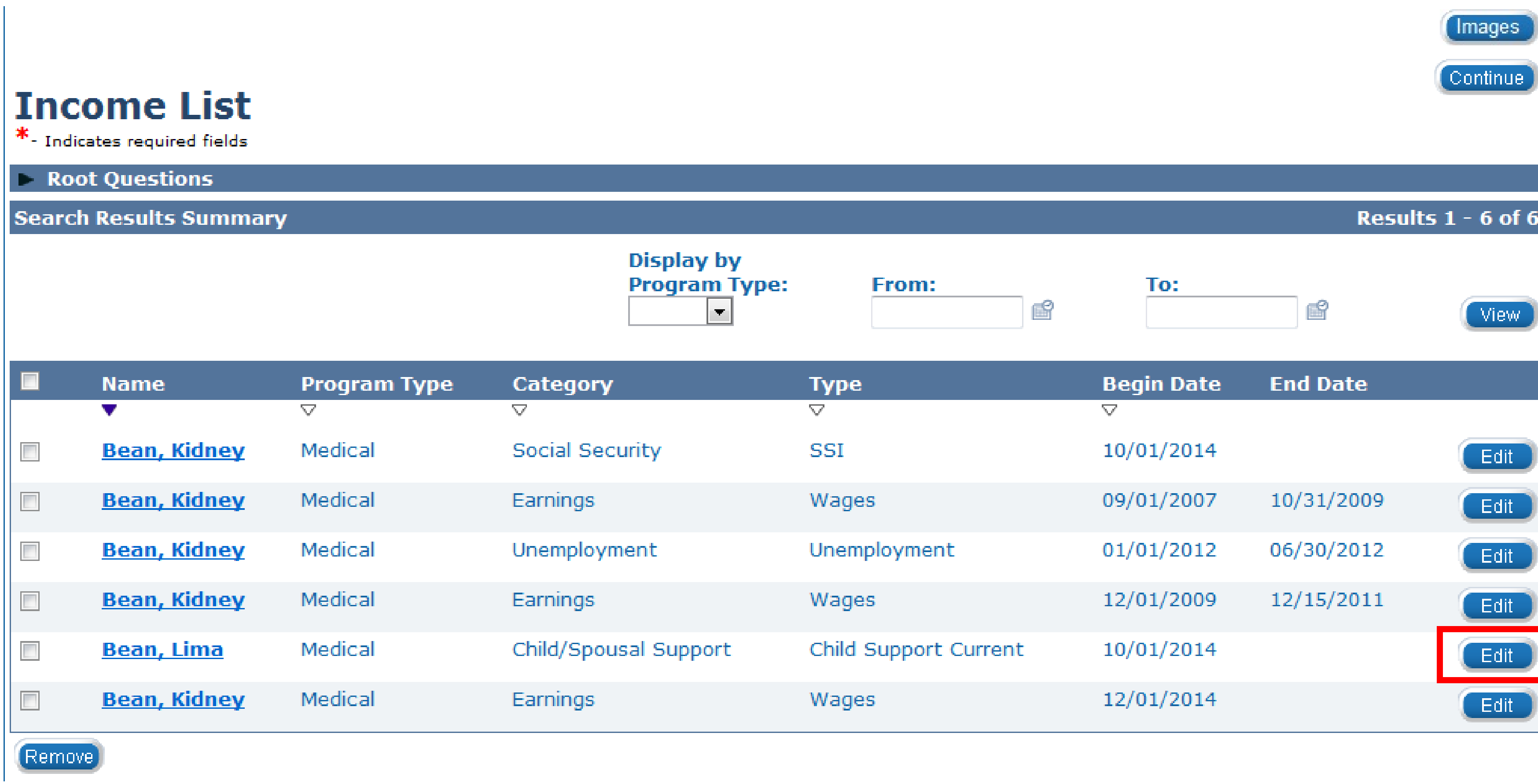


A **saved** Income Amount Detail record on an Income Detail page can be copied to create a new one. By clicking the **Copy** button, KEES saves the previous record and displays an exact duplicate of the Income Amount Detail for editing.

- The new income amount detail record is displayed in Edit Mode.
- The original program that the income amount detail is associated to remains on the income detail record is not be editable.
- The individual income amount detail, other than program, can be modified.

On the **Income List** page:

- Click **Edit** next to the record that you wish to copy.



Images

Continue

Income List

*- Indicates required fields

Root Questions

Search Results Summary — Results 1 - 6 of 6

Display by Program Type: From: To: View

	Name	Program Type	Category	Type	Begin Date	End Date	
☐	Bean, Kidney	Medical	Social Security	SSI	10/01/2014		Edit
☐	Bean, Kidney	Medical	Earnings	Wages	09/01/2007	10/31/2009	Edit
☐	Bean, Kidney	Medical	Unemployment	Unemployment	01/01/2012	06/30/2012	Edit
☐	Bean, Kidney	Medical	Earnings	Wages	12/01/2009	12/15/2011	Edit
☐	Bean, Lima	Medical	Child/Spousal Support	Child Support Current	10/01/2014		Edit
☐	Bean, Kidney	Medical	Earnings	Wages	12/01/2014		Edit

Remove

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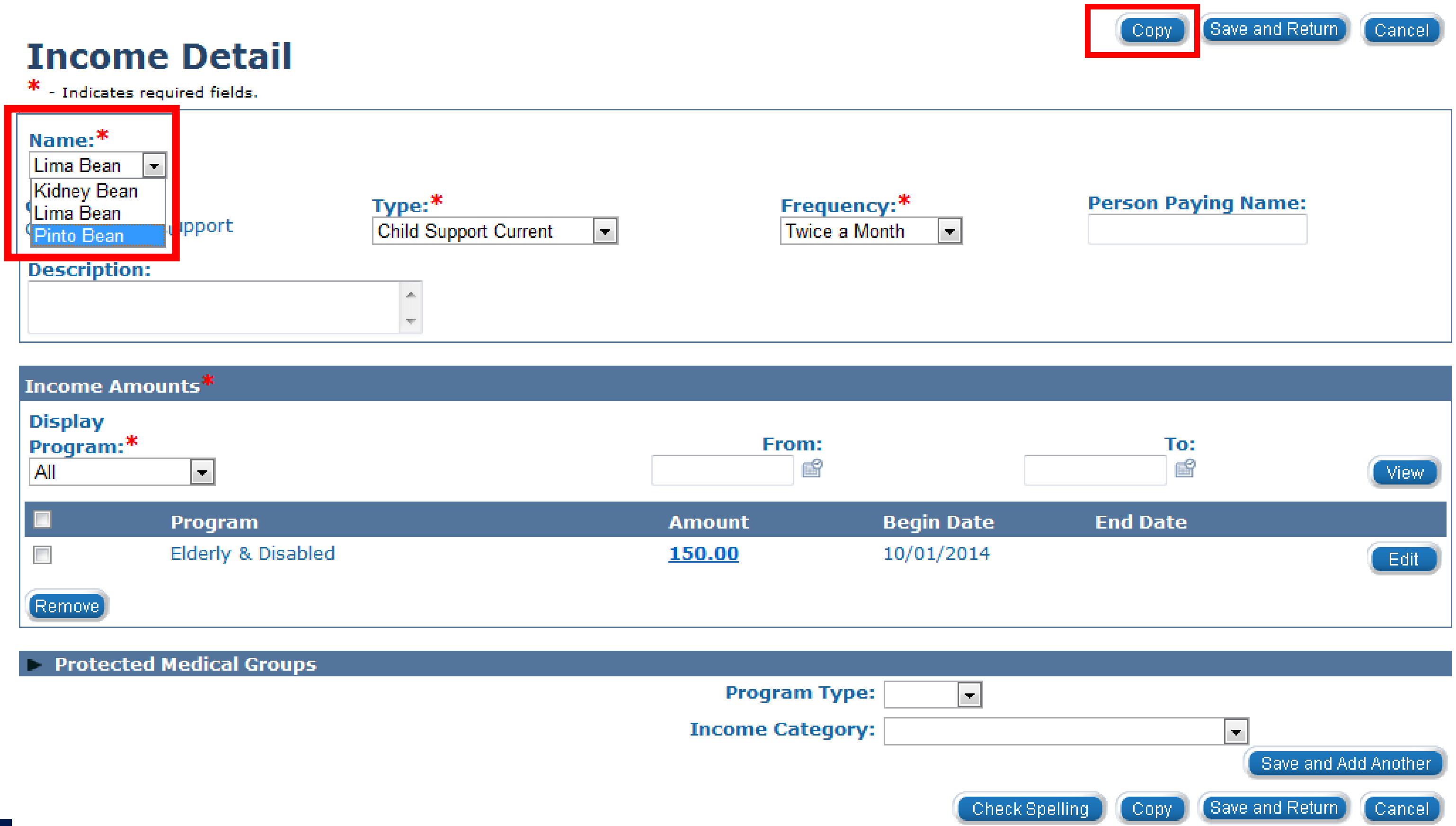
Lesson 2: Income > Copying Detail Records

On the **Income Detail** page:

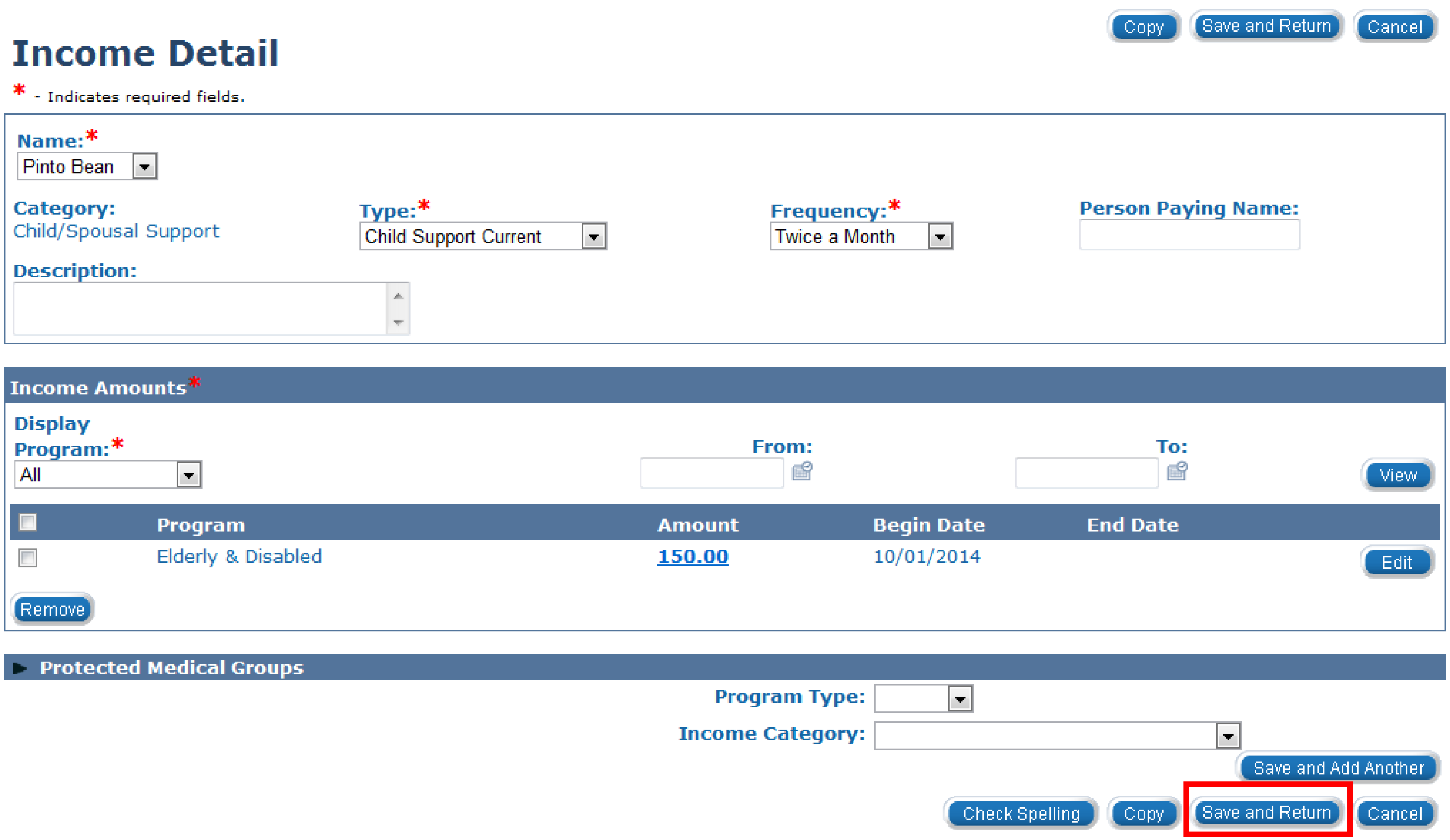
- Click **Copy**. This will allow you to **Edit** the new record while maintaining the information stored on the original record.



Lesson 2: Income > Copying Detail Records

On the **Income Detail** page:

- Once changes have been completed, click **Save and Return**.



On the **Income List** page:

- Both income records will be viewable.

Images

Continue

Income List

*- Indicates required fields

Root Questions

Search Results Summary | Results 1 - 6 of 6

Display by Program Type: | From: | To: | View

	Name	Program Type	Category	Type	Begin Date	End Date	
	Bean, Kidney	Medical	Social Security	SSI	10/01/2014		Edit
	Bean, Kidney	Medical	Earnings	Wages	09/01/2007	10/31/2009	Edit
	Bean, Kidney	Medical	Unemployment	Unemployment	01/01/2012	06/30/2012	Edit
	Bean, Kidney	Medical	Earnings	Wages	12/01/2009	12/15/2011	Edit
	Bean, Lima	Medical	Child/Spousal Support	Child Support Current	10/01/2014		Edit
	Bean, Pinto	Medical	Child/Spousal Support	Child Support Current	10/01/2014		Edit

Remove

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Lesson 2: Income > Income List

When a change is reported for an existing income, it will be necessary to **Edit** the record.

Continue

Income List

*- Indicates required fields

Root Questions

Search Results Summary — Results 1 - 4 of 4

Display by Program Type: | From: 01/26/2015 | To: | View

	Name	Program Type	Category	Type	Begin Date	End Date	
☐	Bean, Kidney	Medical	Social Security	SSI	10/01/2014		Edit
☐	Bean, Kidney	Medical	Earnings	Wages	01/01/2015		Edit
☐	Bean, Pinto	Medical	Child/Spousal Support	Child Support Current	10/01/2014		Edit
☐	Bean, Kidney	Medical	Self-Employment	Self-Employment	10/01/2014		Edit

Remove

Program Type:*

Income Category:*

Add

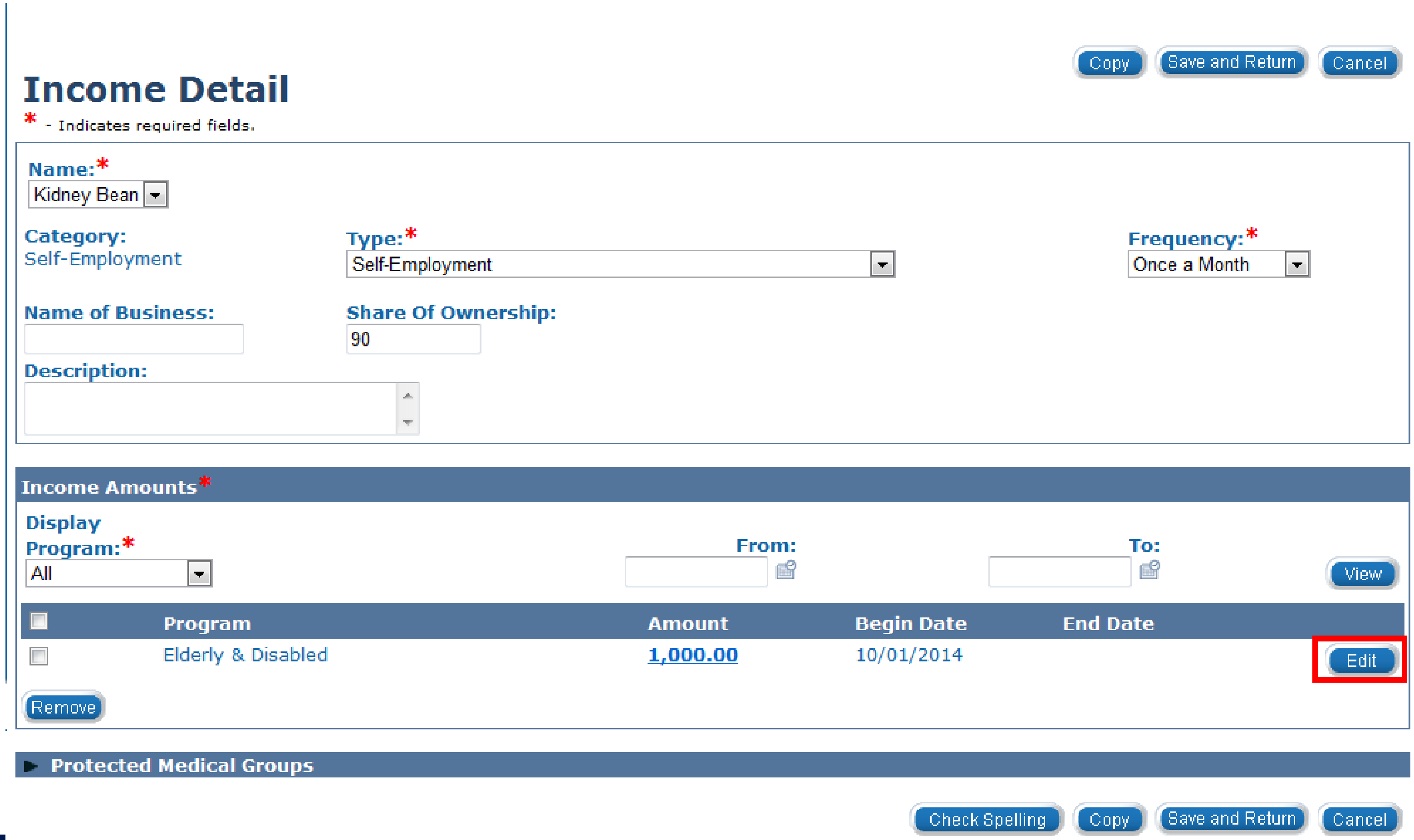
☐ Complete

Continue

Lesson 2: Income > Income Detail Page – End Dating a Record

On the **Income Detail** page under the **Income Amounts** block:

- Click the **Edit** button.



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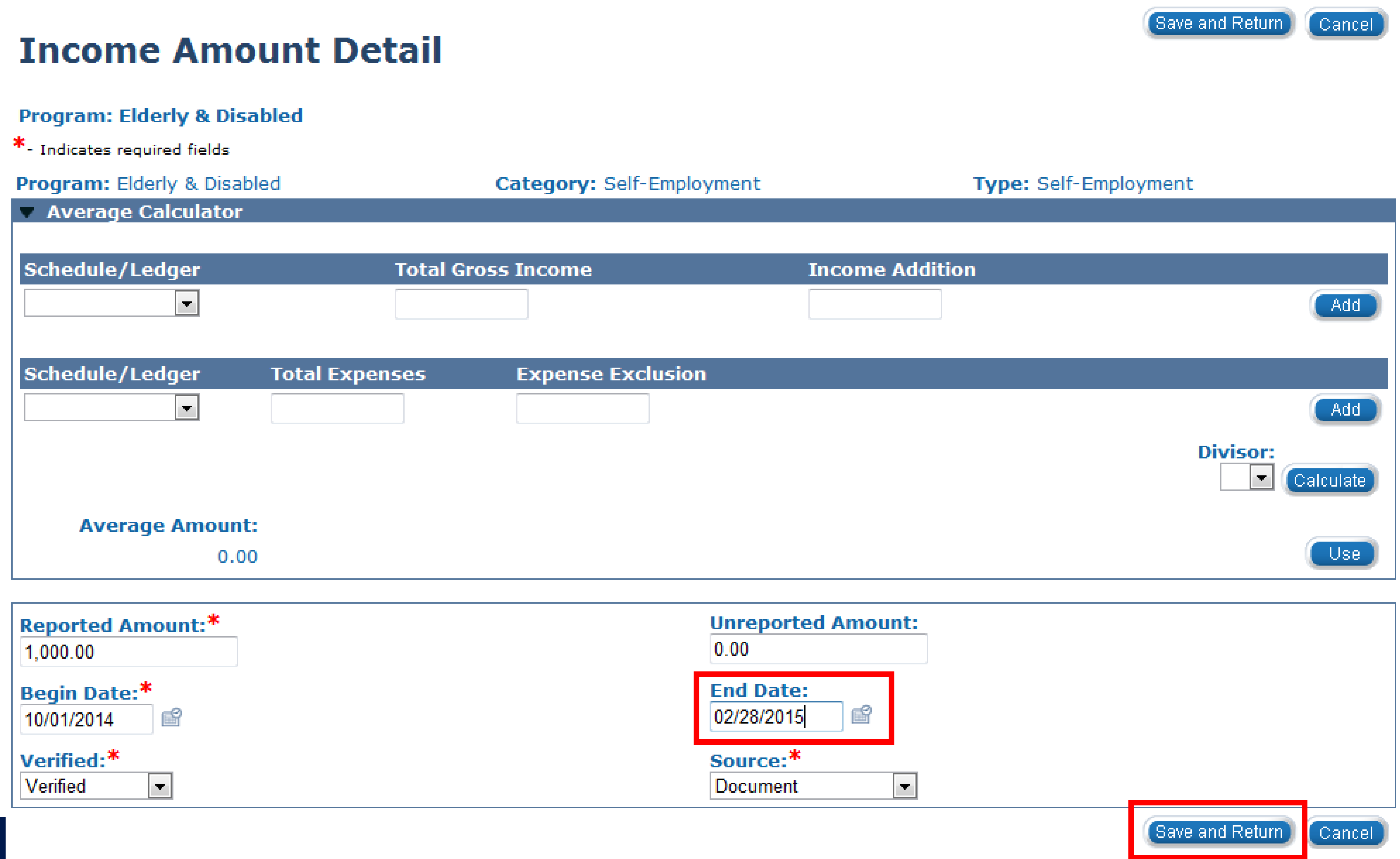
Lesson 2: Income > Income Amount Detail Page – End Dating a Record

On the **Income Amount Detail** page:

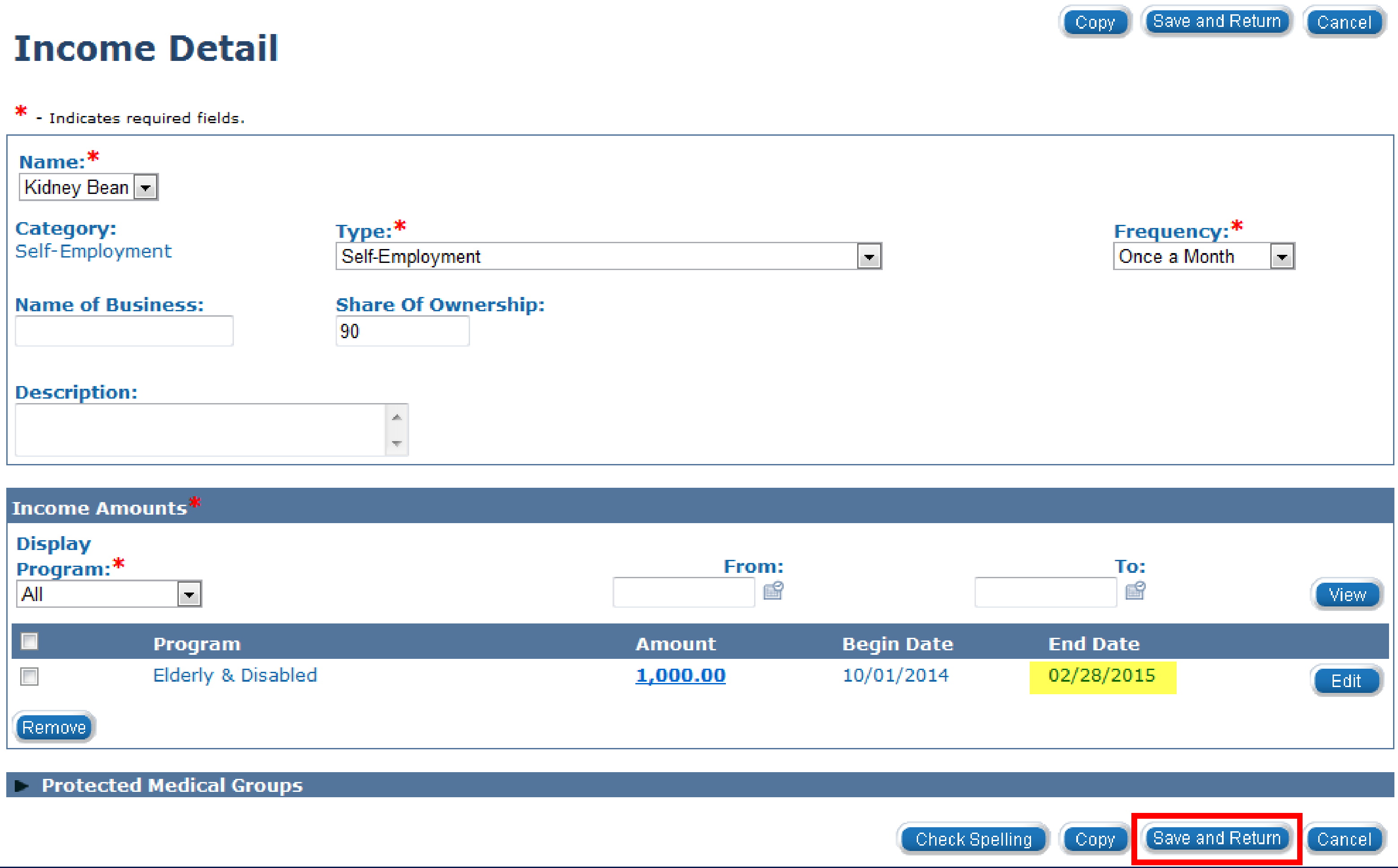
- Enter the **End Date**.
- Click **Save and Return**.



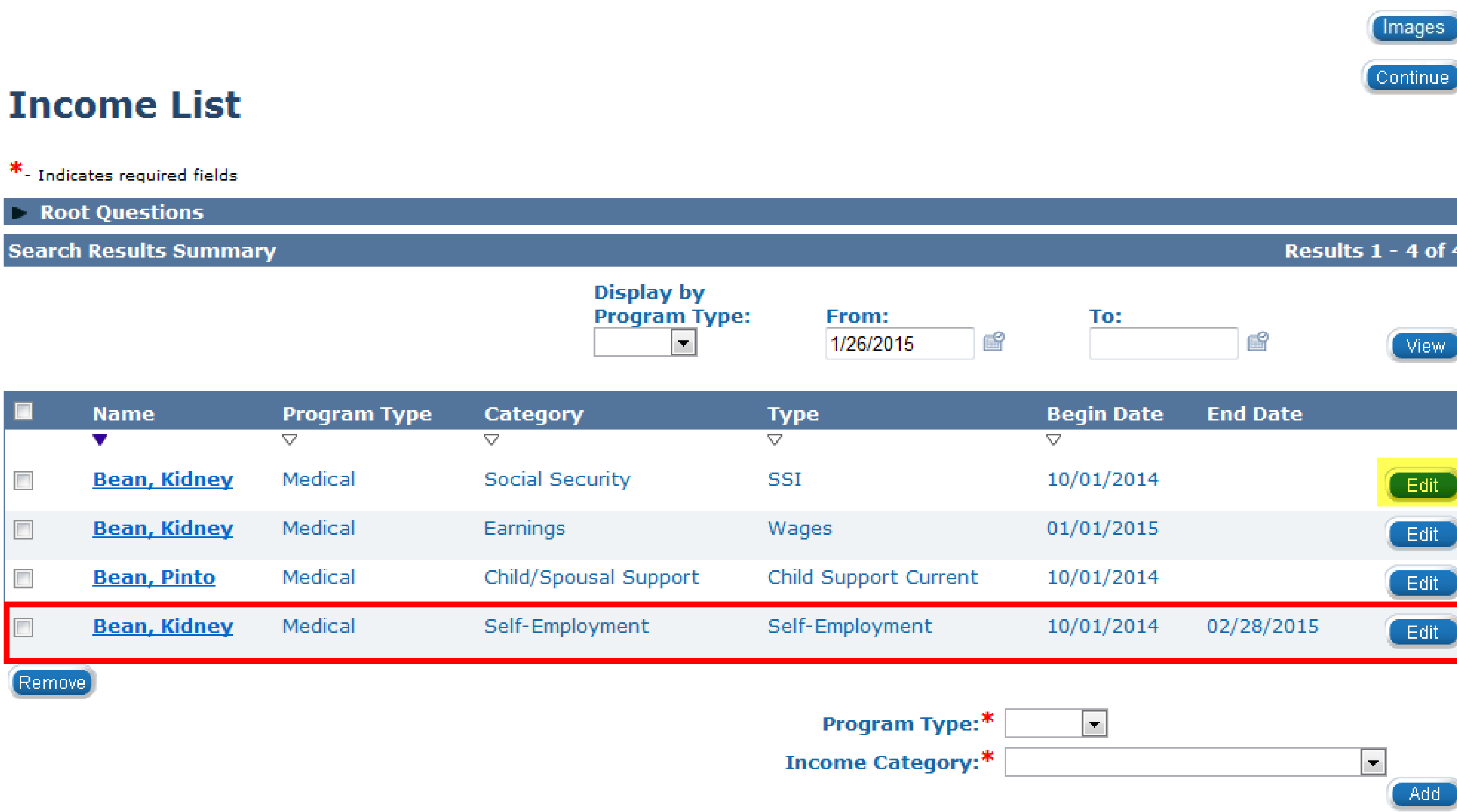
Lesson 2: Income > Income Detail Page – End Dating a Record

On the **Income Detail** page:

- Click the **Save and Return** button.



That record will now show on the **Income List** page with an **End Date**.



Click **Edit** next to the record you wish to update.

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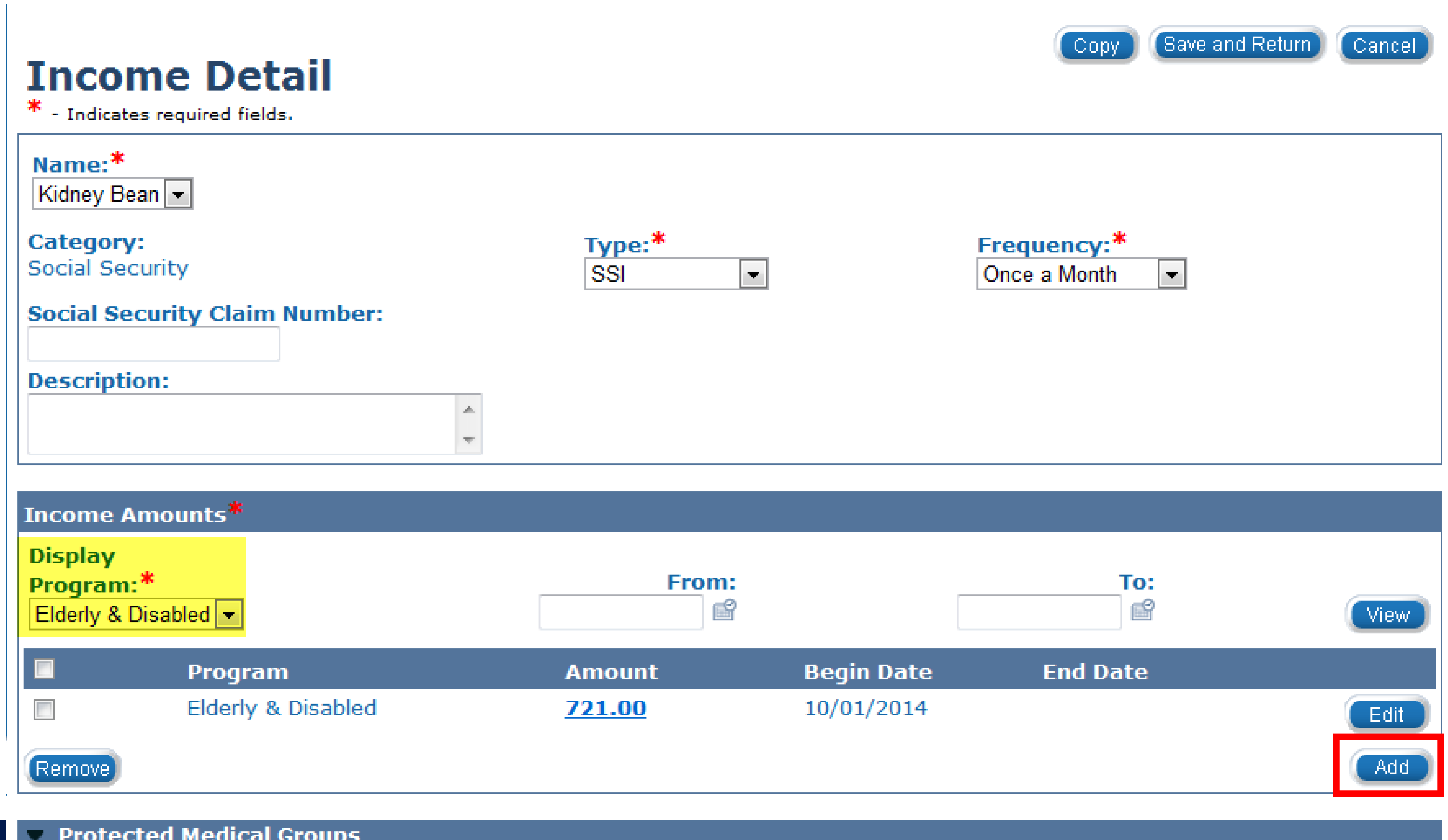
Lesson 2: Income > Income Detail Page – Effective Dating

On the **Income Detail** page under the **Income Amounts** block:

- Select the **Display Program** from the drop-down menu.
- Click the **Add** button.

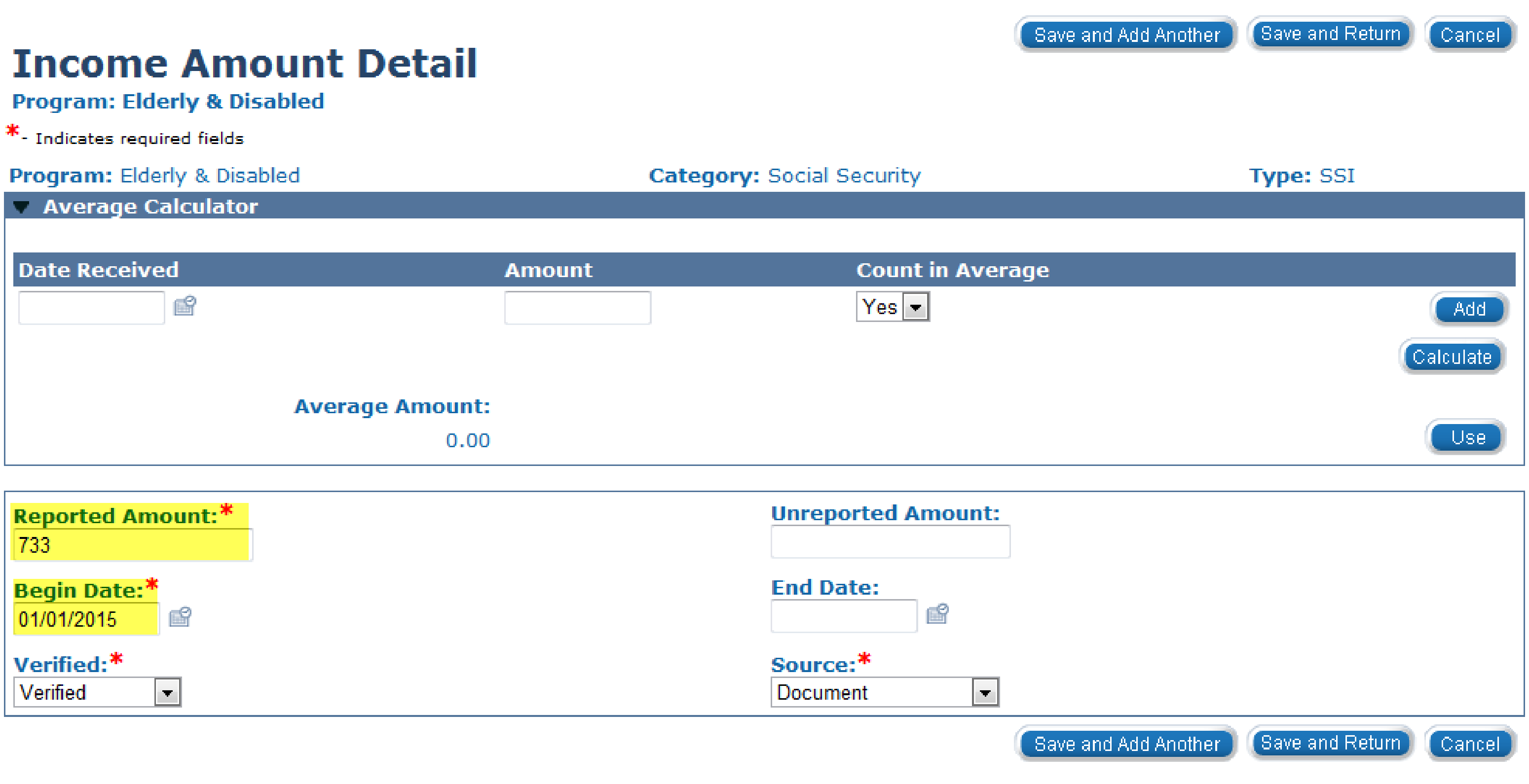


Medical Eligibility: Data Collection - Financial Information

Lesson 2: Income > Income Amount Detail – Effective Dating

On the **Income Amount Detail** page:

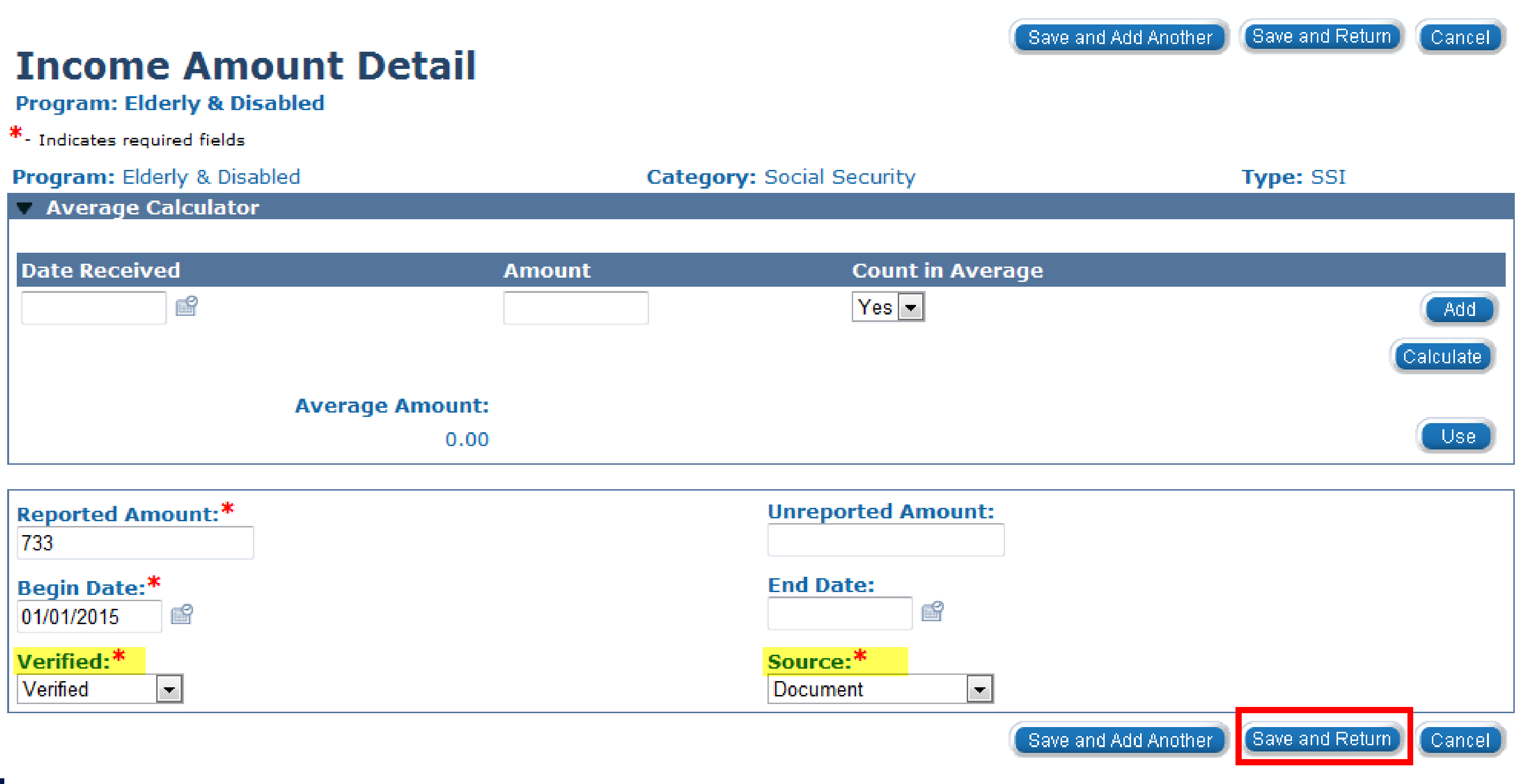
- Enter the **Amount**
  - (by either using the **Reported Amount** field or the **Average Calculator**).
- Enter the **Begin Date**.



Lesson 2: Income > Income Amount Detail – Effective Dating

On the **Income Amount Detail** page:

- Select a **Verified** value from the drop-down menu.
- Select a **Source** from the drop-down menu.
- Click **Save and Return**.



On the **Effective Dating Confirmation List** page:

- Verify the information and dates are accurate.
- Click the **Save** button.

Effective Dating Confirmation List

This is the record you have added or updated:

Reported Amount	Unreported Amount	Begin Date	End Date
733.00	0.00	01/01/2015	

The system will make corrections to your additions/updates:

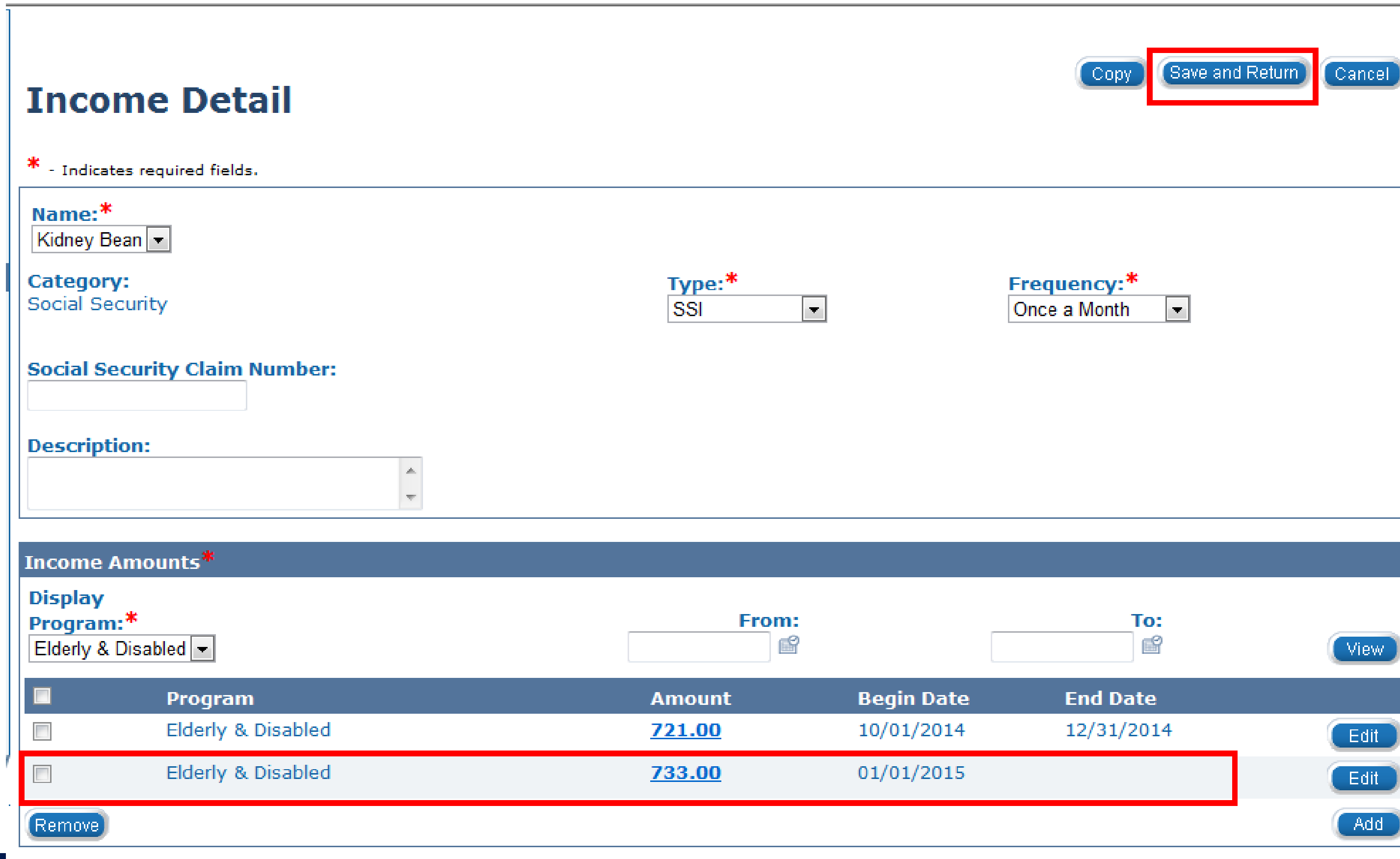
The system will adjust the effective dates of this record:

Reported Amount	Unreported Amount	Begin Date	End Date
721	0	10/01/2014	12/31/2014

Click Save to continue or Cancel to undo this action. Save Cancel

On the **Income Detail** page:

- Verify all mandatory fields are complete.
- Click **Save and Return**.



That record will display on the **Income List** page.

Images

Continue

Income List

*- Indicates required fields

▶ Root Questions

Search Results Summary — Results 1 - 4 of 4

Display by Program Type: | From: 12/01/2014 | To: | View

	Name	Program Type	Category	Type	Begin Date	End Date	
☐	Bean, Kidney	Medical	Social Security	SSI	10/01/2014		Edit
☐	Bean, Kidney	Medical	Earnings	Wages	01/01/2014		Edit
☐	Bean, Pinto	Medical	Child/Spousal Support	Child Support Current	10/01/2014		Edit
☐	Bean, Kidney	Medical	Self-Employment	Self-Employment	10/01/2014	02/28/2015	Edit

Remove

Program Type:*

Income Category:*

Add

In this lesson you learned:

- How to add income records
- How to use the Average Calculator
- How to copy income records
- How to end date income records
- How to edit income records

Agenda

Lesson 1: Financial Page Navigation

Lesson 2: Income

Lesson 3: Resources

Lesson 4: Tax

Lesson 5: Expenses

Lesson 6: Medicare Expense

Lesson 7: Medical Subrogation

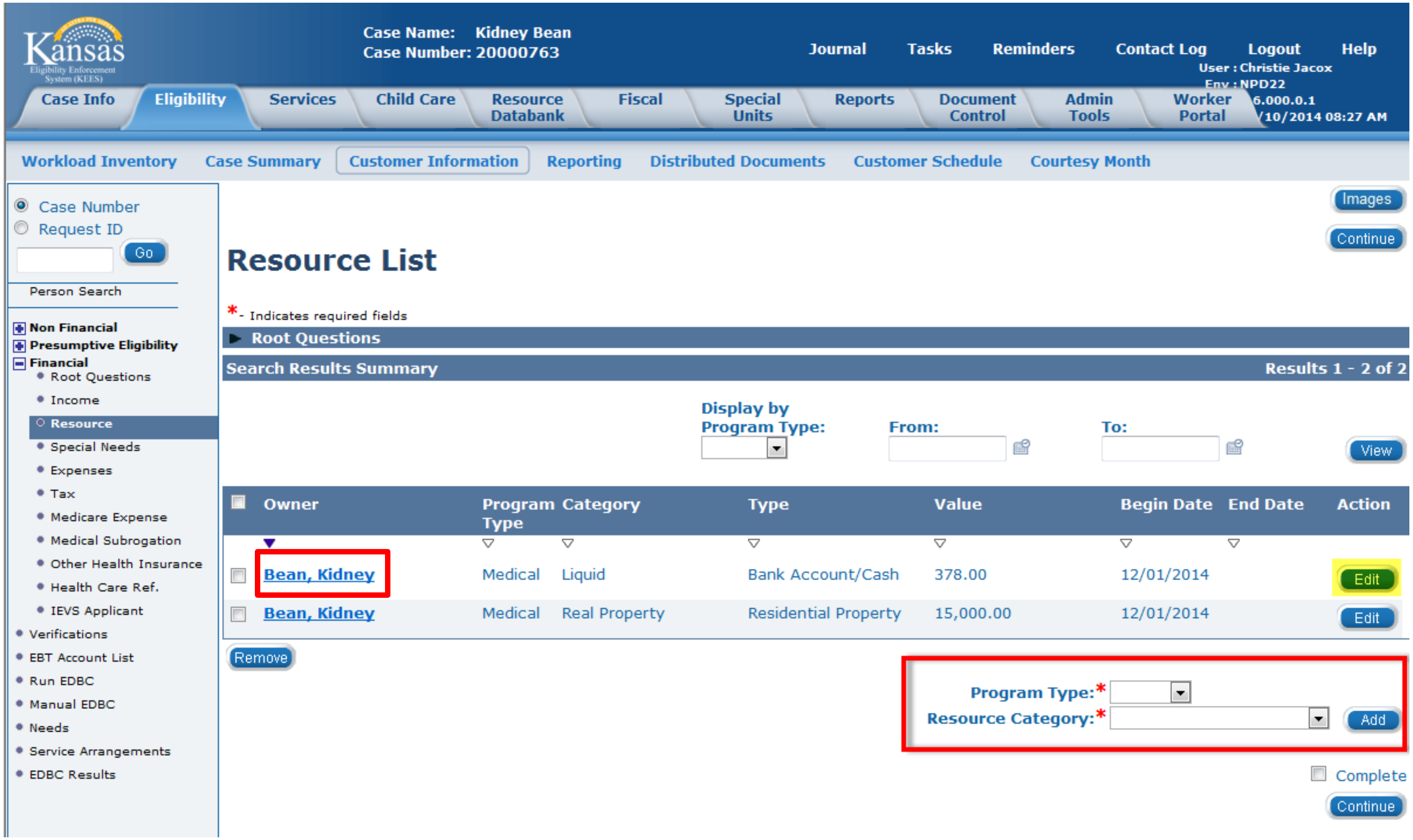
Lesson 8: Other Health Insurance

The **Resource List** page allows the worker to view the type of resources each consumer owns. The types of resources are captured on the detail pages:

- **Liquid Resources Detail** –includes: checking, savings, stocks, etc...
- **Motor Vehicle Detail** –includes: cars, motorcycles, RVs, etc…
- **Real Property Detail** –includes: houses, land, buildings, etc…

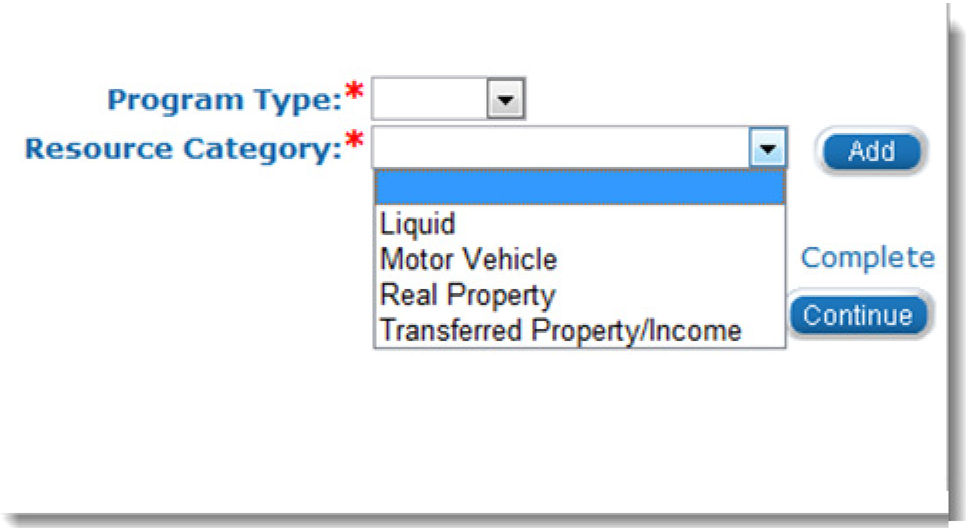
Medical Eligibility: Data Collection - Financial Information

Lesson 3: Resources > Resource List Page



Once **Resource** is selected on the Task Navigation, the **Resource List** page appears. It is from this screen that resource records can be viewed, edited, or added.

The **Resource Category** drop-down includes:

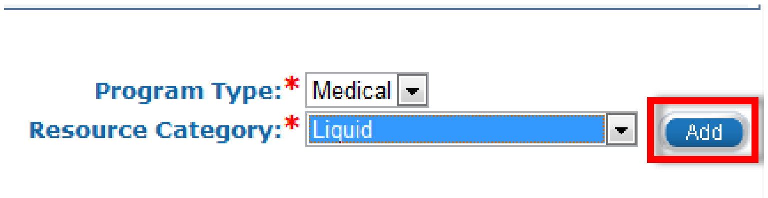


Once a **Resource Category** is selected, click the **Add** button. Depending on the type of resource selected, the appropriate **Resource Detail** page appears.

Note: Transferred Property/Income is not being utilized at this time.

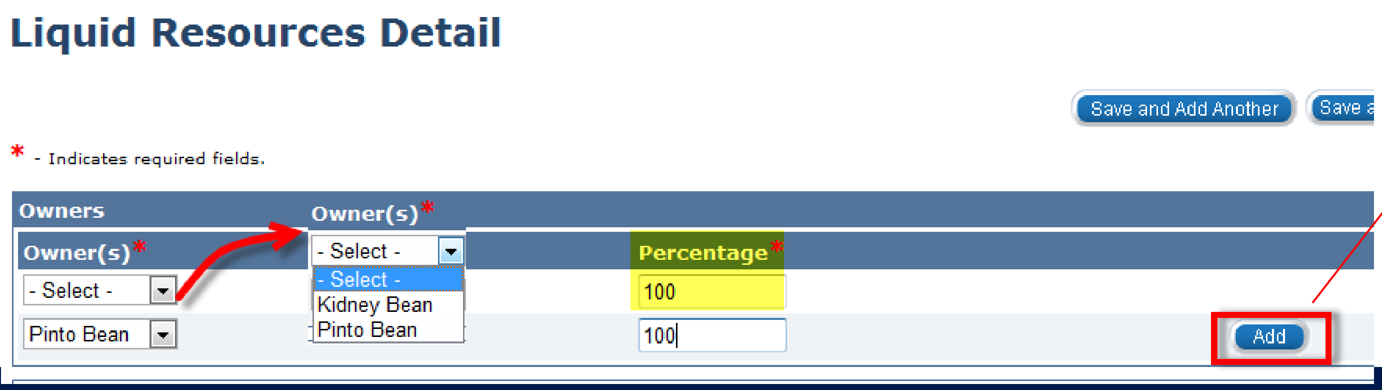
To enter financial data for a Liquid Resource:

- Select the **Program Type, Medical** from the drop-down menu on the **Resource List** page
- Select a **Resource Category** of **Liquid**
- Click the **Add** button



On the Liquid Resources Detail page:

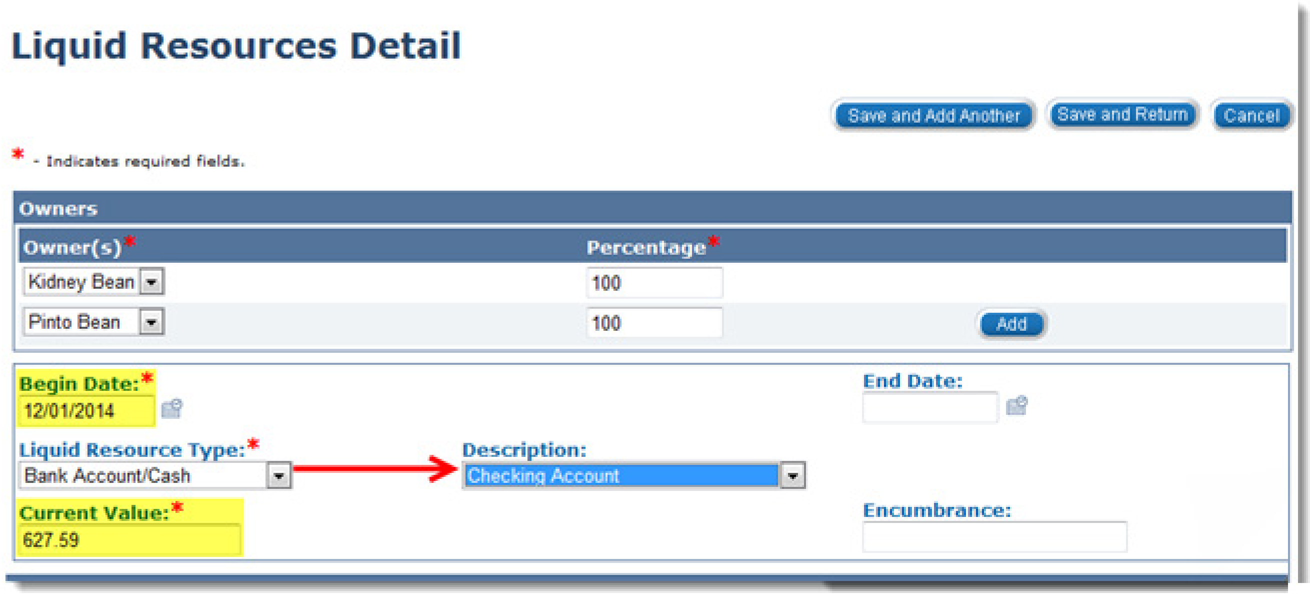
- Select the **Owner(s)** from the drop-down menu
- For liquid resources all owners own 100 percent of the resource.
- If there are multiple owners, select the name from the drop-down menu, enter 100 in the **Percentage** field and click **Add**



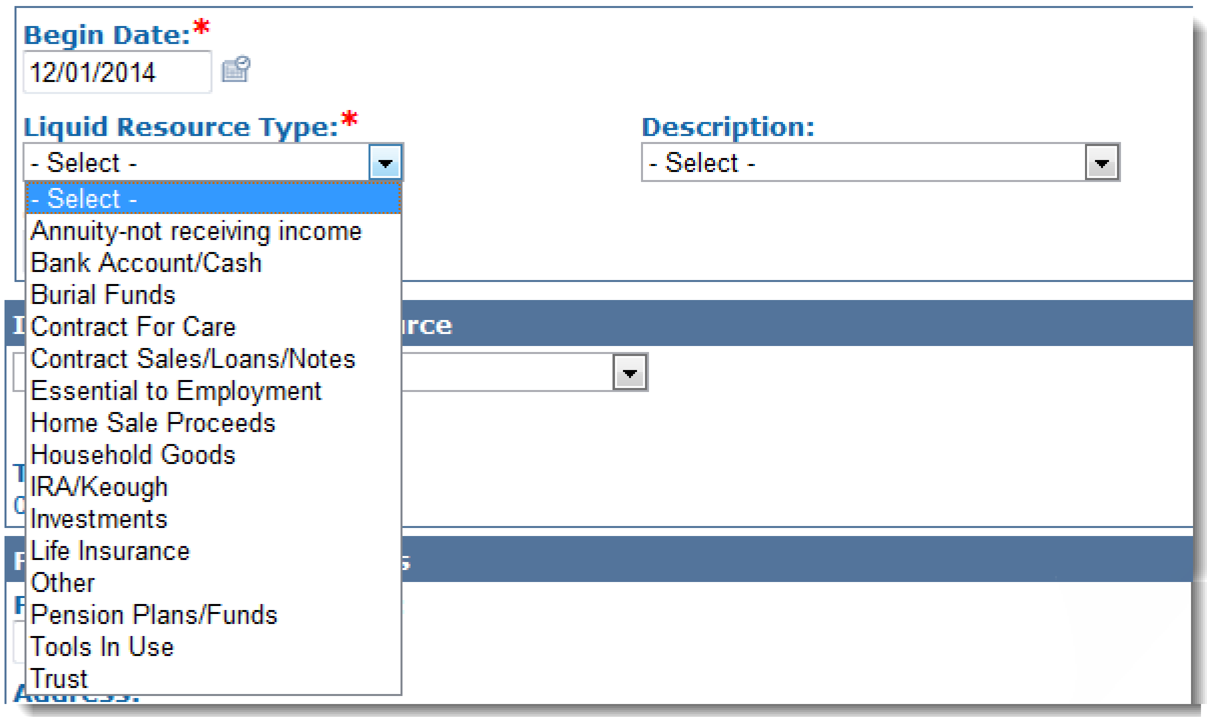
Note: It is only necessary to click **Add** if you have more than two owners.

On the **Liquid Resource Detail** page:

- Enter the **Begin Date**
- Select the **Liquid Resource Type** from the drop-down menu
  - (The Liquid Resource Type field is dynamic & different Description options and sections appear based on the type of liquid resource selected.)
- Select the **Description**
- Enter the **Current Value** of the resource



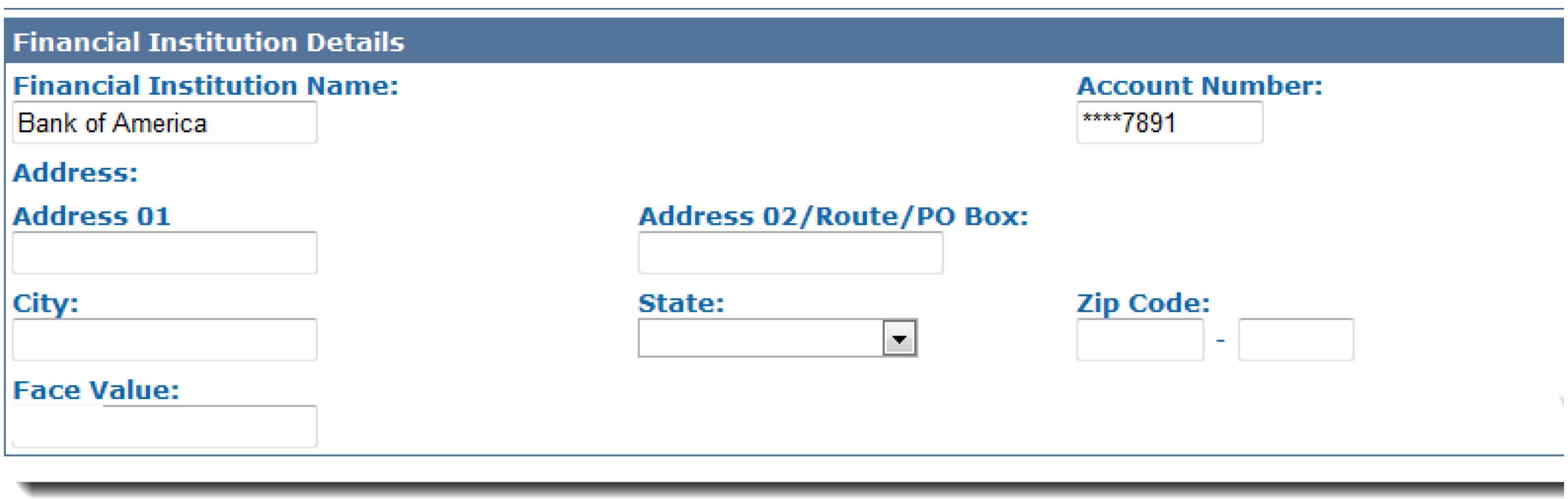
The **Liquid Resource Type** drop-down includes:



Once a **Liquid Resource Type** is selected, the **Description** field will allow you to make a selection

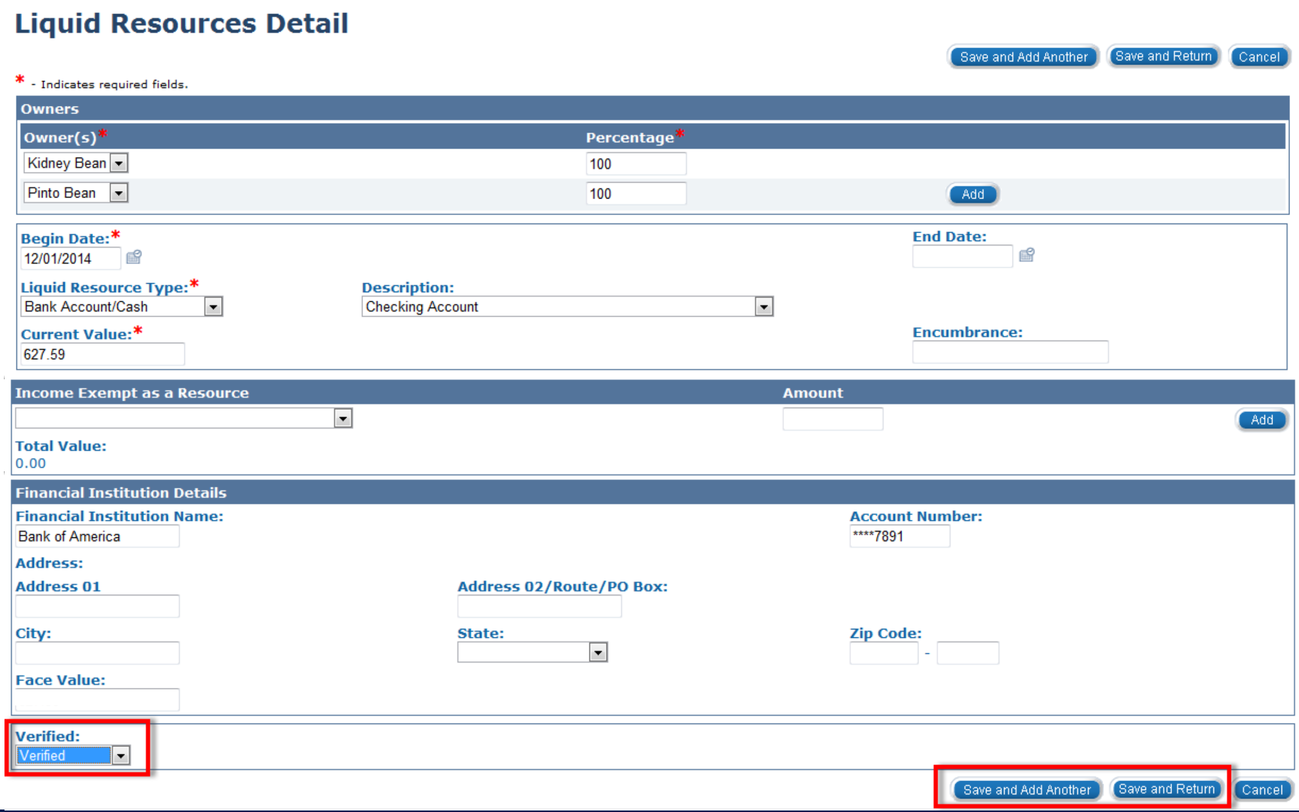
On the **Liquid Resource Detail** page:

- Enter all known **Financial Institution Details**



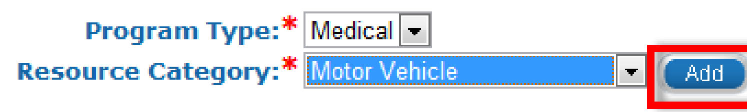
Once all resource information is entered:

- Select a **Verified** Value from the drop-down list.
- Select **Save and Return.**
  - If there are additional liquid resources, click **Save and Add Another.**



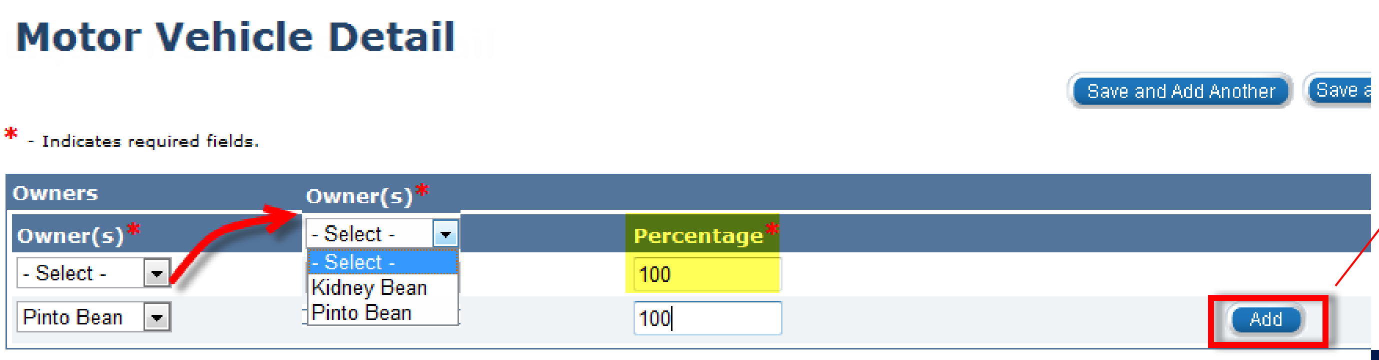
To enter financial data for a Motor Vehicle:

- Select the **Program Type, Medical** from the drop-down menu on the **Resource List** page.
- Select a **Resource Category** of **Motor Vehicle**.
- Click the **Add** button.



On the **Motor Vehicle Detail** page:

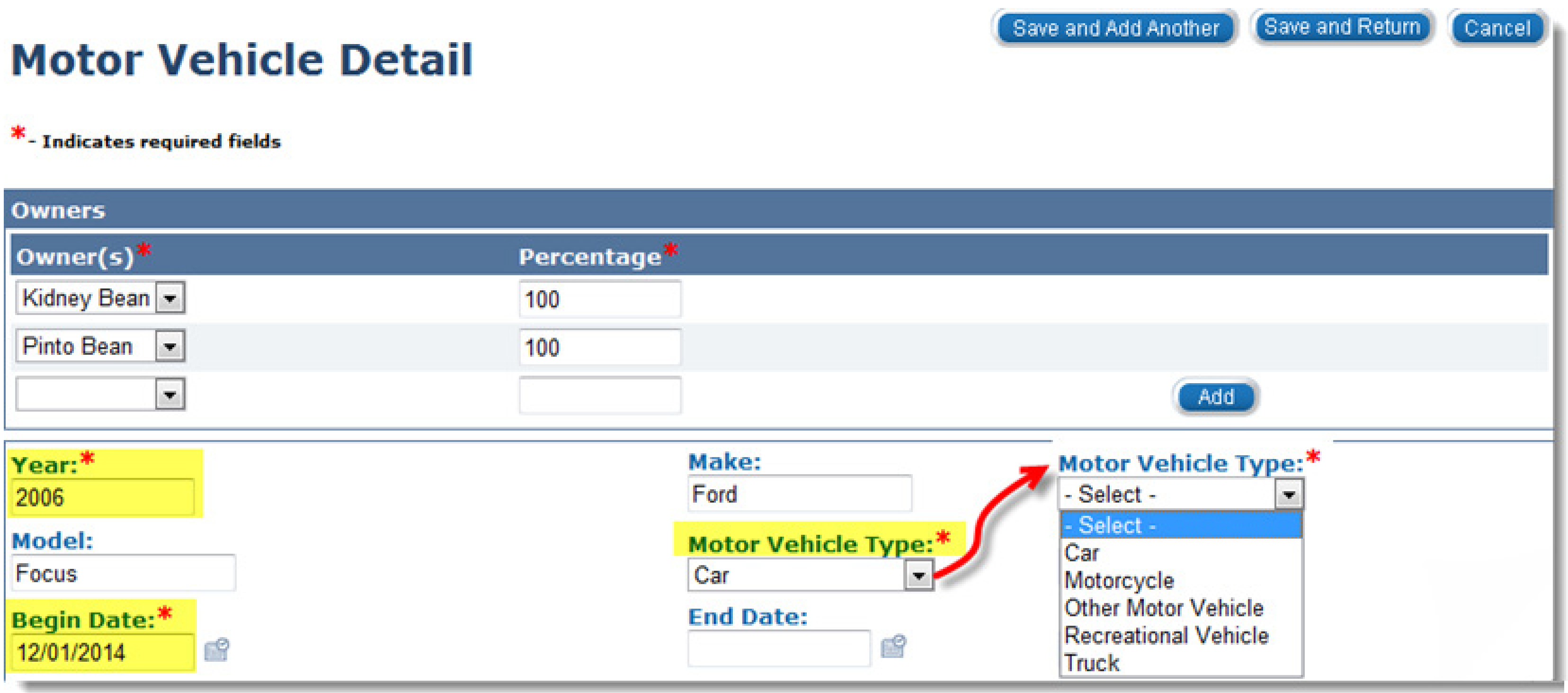
- Select the **Owner(s)** from the drop-down menu.
- For Motor Vehicles all owners own 100 percent of the resource.
- If there are multiple owners, select the name from the drop-down menu, enter 100 in the **Percentage** field and click **Add.**



Note: It is only necessary to click **Add** if you have more than two owners.

On the **Motor Vehicle Detail** page:

- Enter the **Year, Make** (if known), **Model** (if known).
- Select the **Motor Vehicle Type** from the drop-down menu.
- Enter the **Begin Date.**

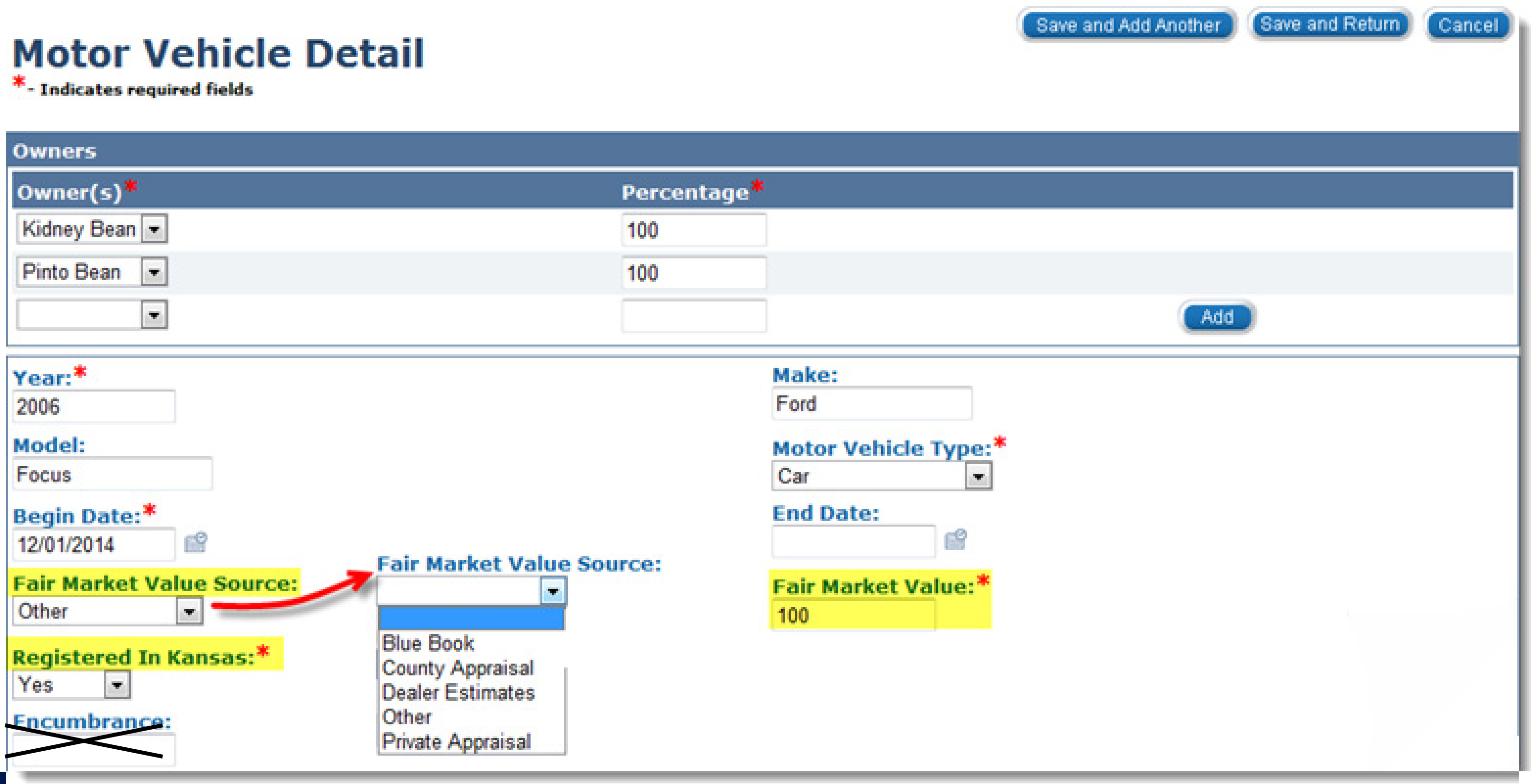


Medical Eligibility: Data Collection - Financial Information

Lesson 3: Resources > Adding Resources: Motor Vehicle Detail Page

On the **Motor Vehicle Detail** page:

- Select the **Fair Market Value Source** from the drop-down menu.
- Enter **Fair Market Value** amount.
- Select **Yes** or **No** from the **Registered in Kansas** drop-down menu.

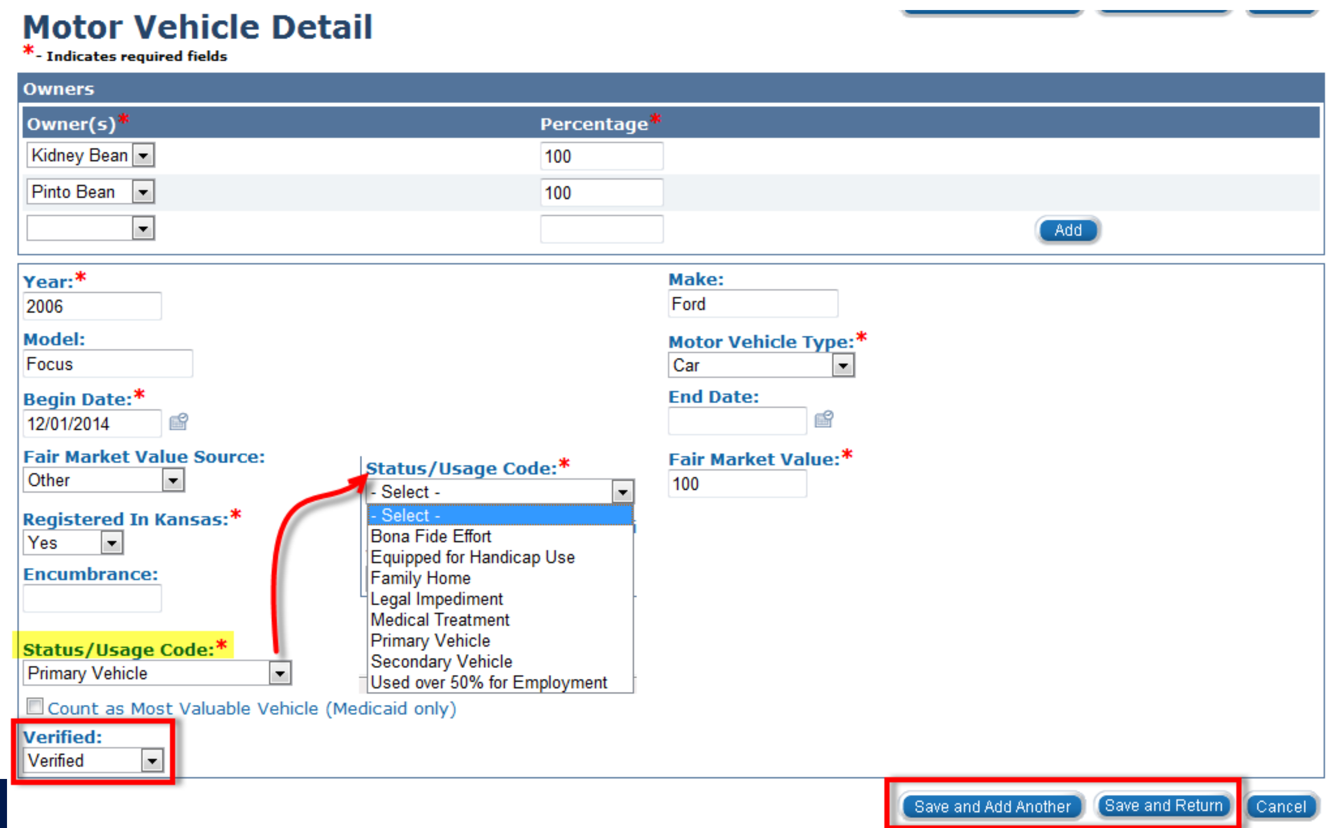


Medical Eligibility: Data Collection - Financial Information

Lesson 3: Resources > Adding Resources: Motor Vehicle Detail Page

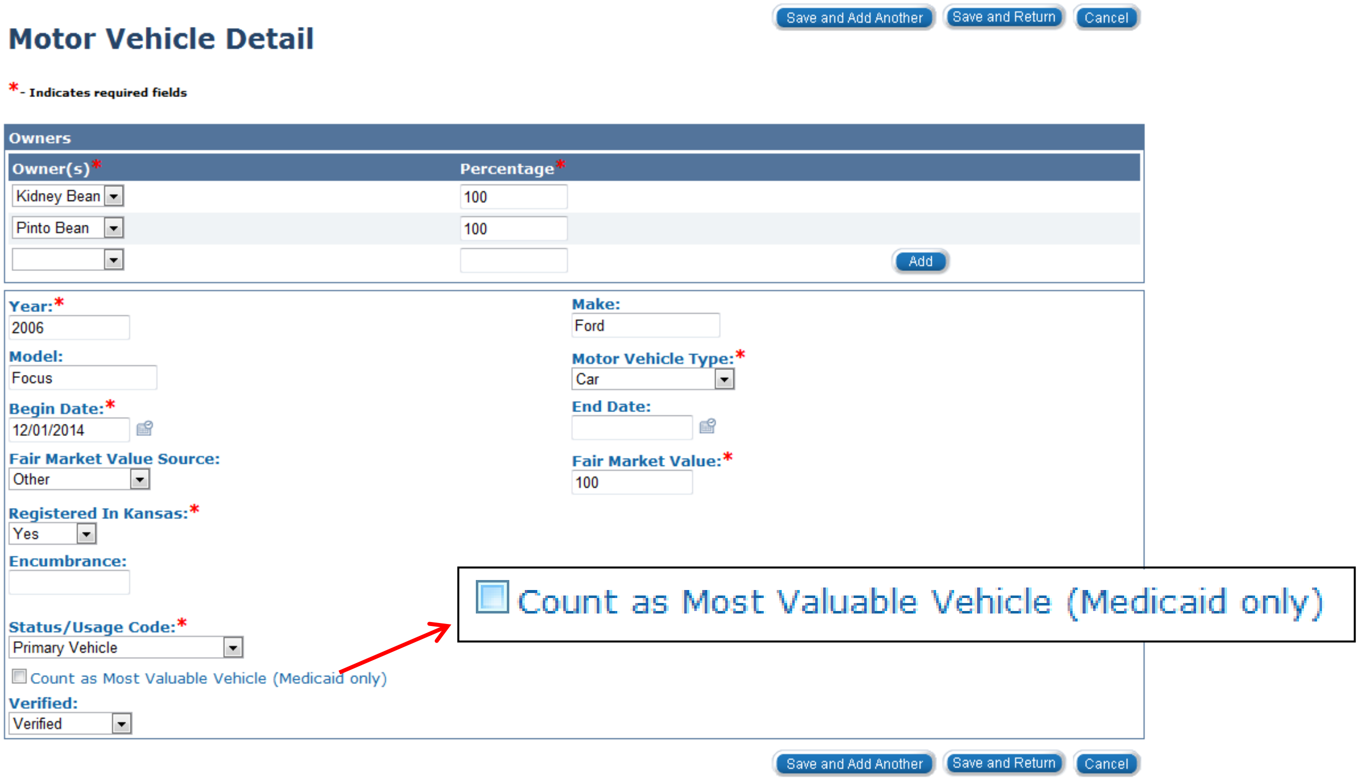
On the **Motor Vehicle Detail** page:

- Select the **Status/Usage Code** from the drop-down menu
- Select a **Verified** Value from the drop-down list.
- Select **Save and Return.**
  - If there are additional motor vehicles, click **Save and Add Another.**



Medical Eligibility: Data Collection - Financial Information

Lesson 3: Resources > Adding Resources: Motor Vehicle Detail Page


Save and Add Another | Save and Return | Cancel

Motor Vehicle Detail

*- Indicates required fields

Owners

Owner(s)*	Percentage*
Kidney Bean	100
Pinto Bean	100

Add

Year:* 2006

Make: Ford

Model: Focus

Motor Vehicle Type:* Car

Begin Date:* 12/01/2014

End Date:

Fair Market Value Source: Other

Fair Market Value:* 100

Registered In Kansas:* Yes

Encumbrance:

Status/Usage Code:* Primary Vehicle

☐ Count as Most Valuable Vehicle (Medicaid only)

Verified: Verified

☐ Count as Most Valuable Vehicle (Medicaid only)

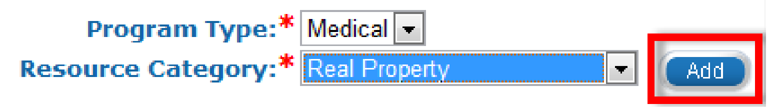
Save and Add Another | Save and Return | Cancel

The checkbox for **Count as Most Valuable Vehicle** is used if the consumer has more than one vehicle being added as a resource. By checking this box, the rules will count that vehicle as the exempt vehicle for the consumer.

Lesson 3: Resources > Adding Resources: Real Property Detail Page

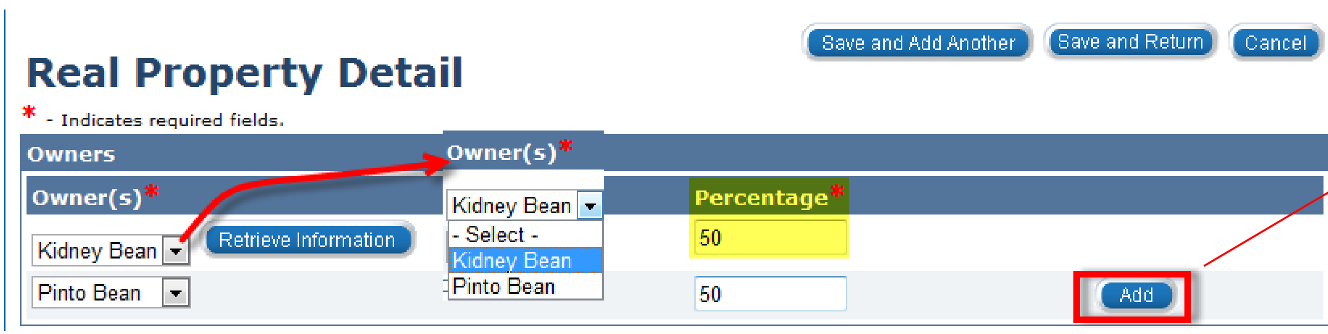
To enter financial data for Real Property:

- Select the **Program Type, Medical** from the drop-down menu on the **Resource List** page
- Select a **Resource Category** of **Real Property**
- Click the **Add** button



On the **Real Property Detail** page:

- Select the **Owner(s**) from the drop-down menu
- For Real Property an owner can own a portion of the property.
- If there are multiple owners, select the name from the drop-down menu, enter the appropriate amount in the **Percentage** field and click **Add**



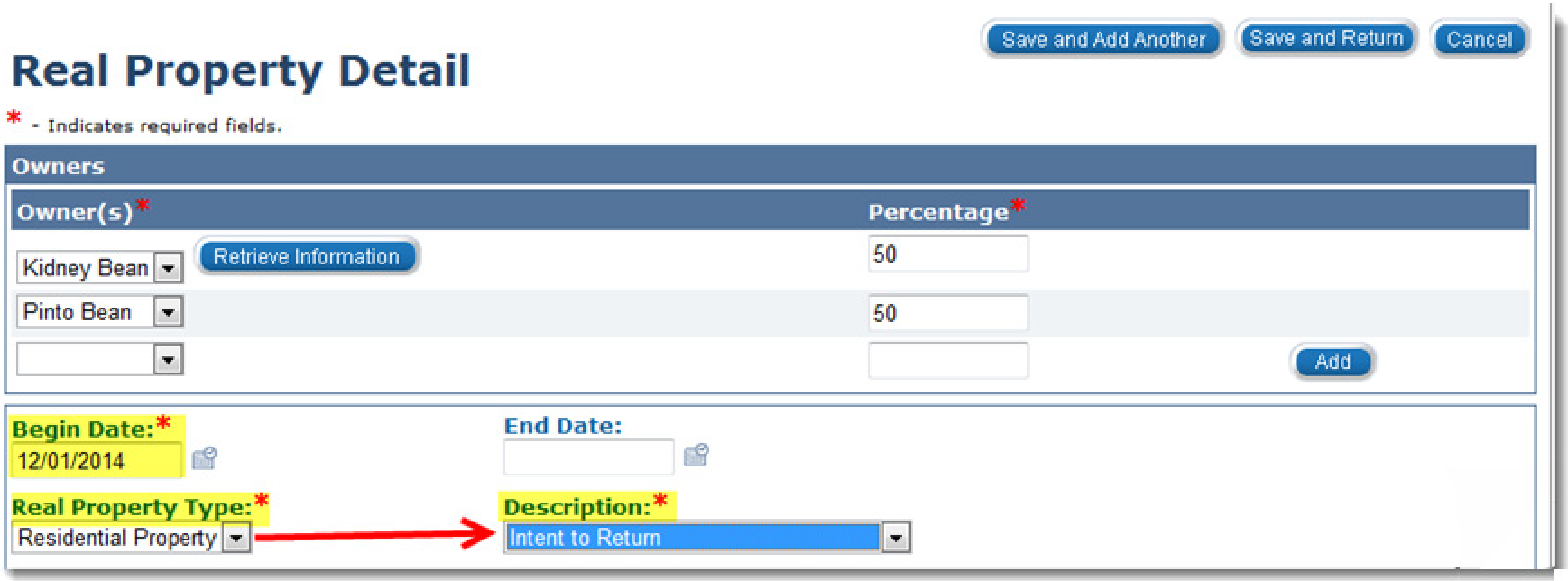
Note: It is only necessary to click **Add** if you have more than tw owners.

Medical Eligibility: Data Collection - Financial Information

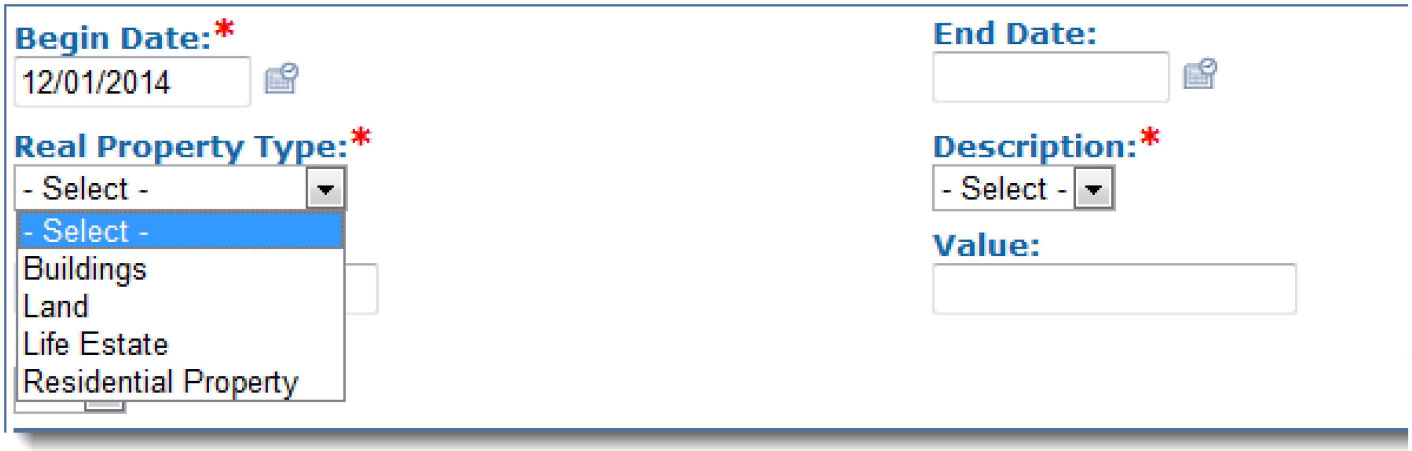
Lesson 3: Resources > Adding Resources: Real Property Detail Page

On the **Real Property Detail** page:

- Enter the **Begin Date**
- Select the **Real Property Type** from the drop-down menu.
  - The Real Property Type field is dynamic & different Description options & sections appear based on the type of Real Property selected.
- Select the **Description.**



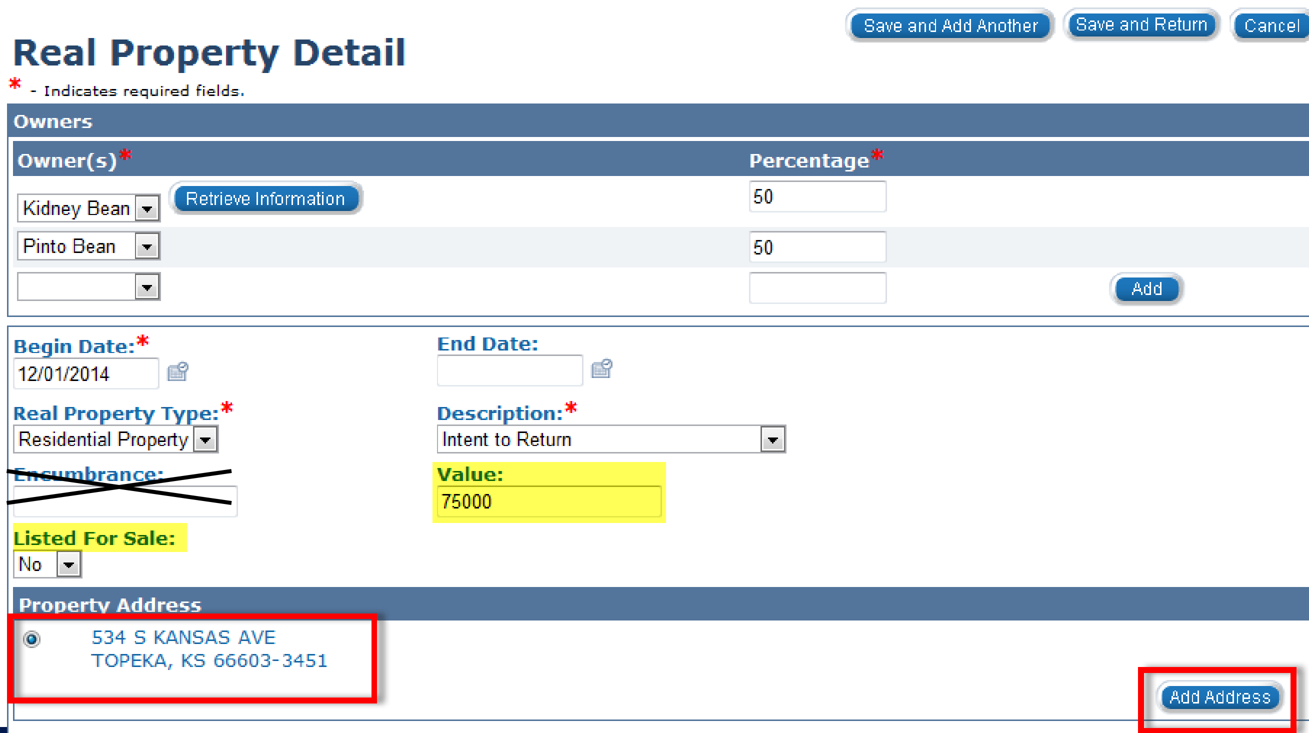
The **Real Property Type** drop-down includes:



Once a **Real Property Type** is selected, the **Description** field will allow you to make a selection.

On the **Real Property Detail** page:

- Enter the property's current value in the **Value** field.
- Select **Yes** or **No** from the **Listed for Sale** drop-down menu.
- Select the address using the radio button, or add the address using the **Add Address** button.

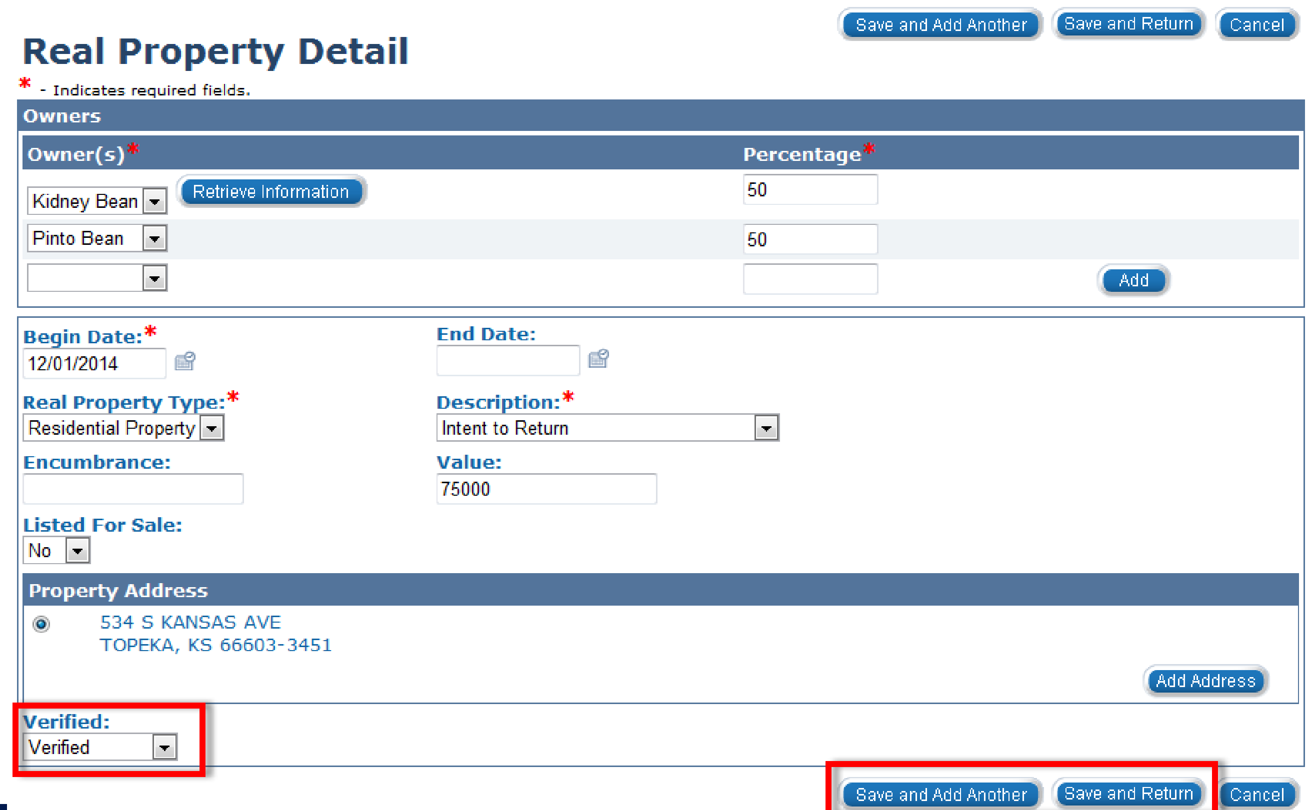


Medical Eligibility: Data Collection - Financial Information

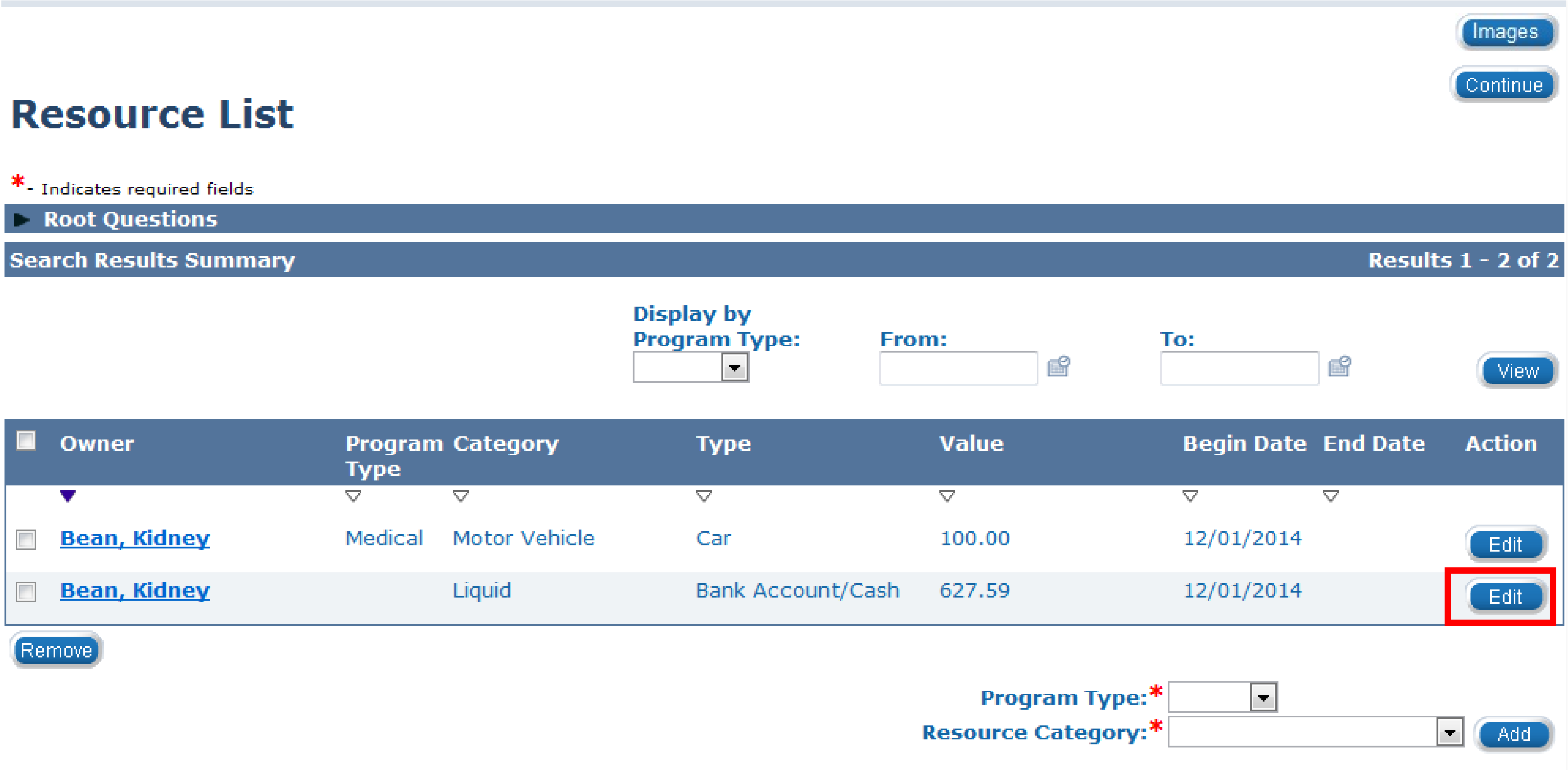
Lesson 3: Resources > Adding Resources: Real Property Detail Page

Once all property information is entered:

- Select a **Verified** value from the drop-down list.
- Select **Save and Return.**
  - If there are additional properties, click **Save and Add Another.**



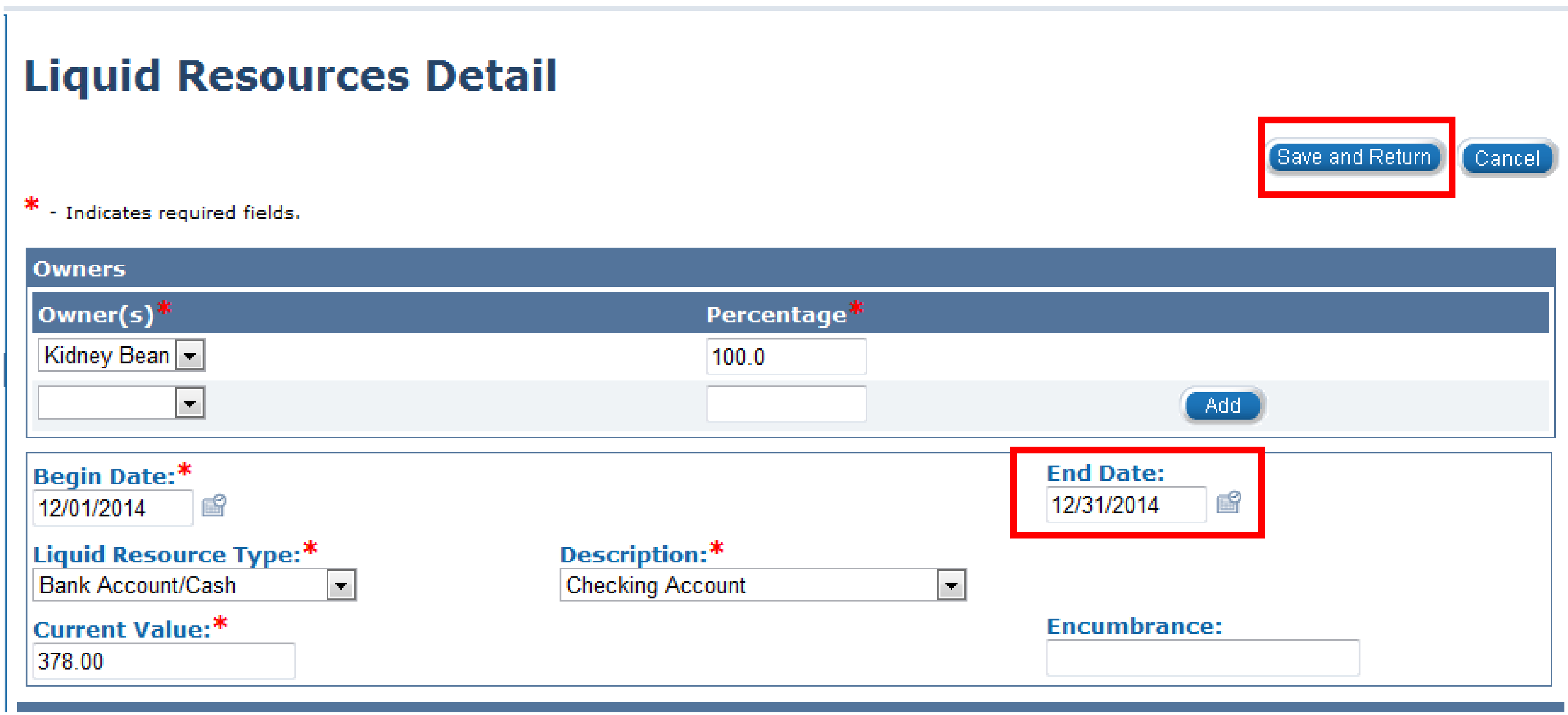
When a change is reported for an existing resource, it will be necessary to **Edit** the record.



Lesson 3: Resources > Resource Detail Page – End Dating

On the **Resource Detail** page:

- Enter the **End Date**.
- Click **Save and Return**.



Medical Eligibility: Data Collection - Financial Information

Lesson 3: Resources > Resource List Page – End Dating

This record will still display on the **Resource List** page. A new record, with the updated information may now be **Added**.

Resource List

*- Indicates required fields

▶ Root Questions

Search Results Summary — Results 1 - 3 of 3

Display by Program Type: From: To: View

Owner	Program Type	Category	Type	Value	Begin Date	End Date	Action
Bean, Kidney	Medical	Motor Vehicle	Car	100.00	12/01/2014		Edit
Bean, Kidney	Medical	Liquid	Bank Account/Cash	378.00	12/01/2014	12/31/2014	Edit
Bean, Kidney	Medical	Real Property	Residential Property		10/01/2009	10/30/2012	Edit

Remove

Program Type:*

Resource Category:*

Add

In this lesson you learned:

- What resources are captured on the **Resource** page
- How to add a liquid resource
- How to add a motor vehicle
- How to add real property
- When to edit resource records
- How to end date resource records

Agenda

Lesson 1: Financial Page Navigation

Lesson 2: Income

Lesson 3: Resources

Lesson 4: Expenses

Lesson 5: Tax

Lesson 6: Medicare Expense

Lesson 7: Medical Subrogation

Lesson 8: Other Health Insurance

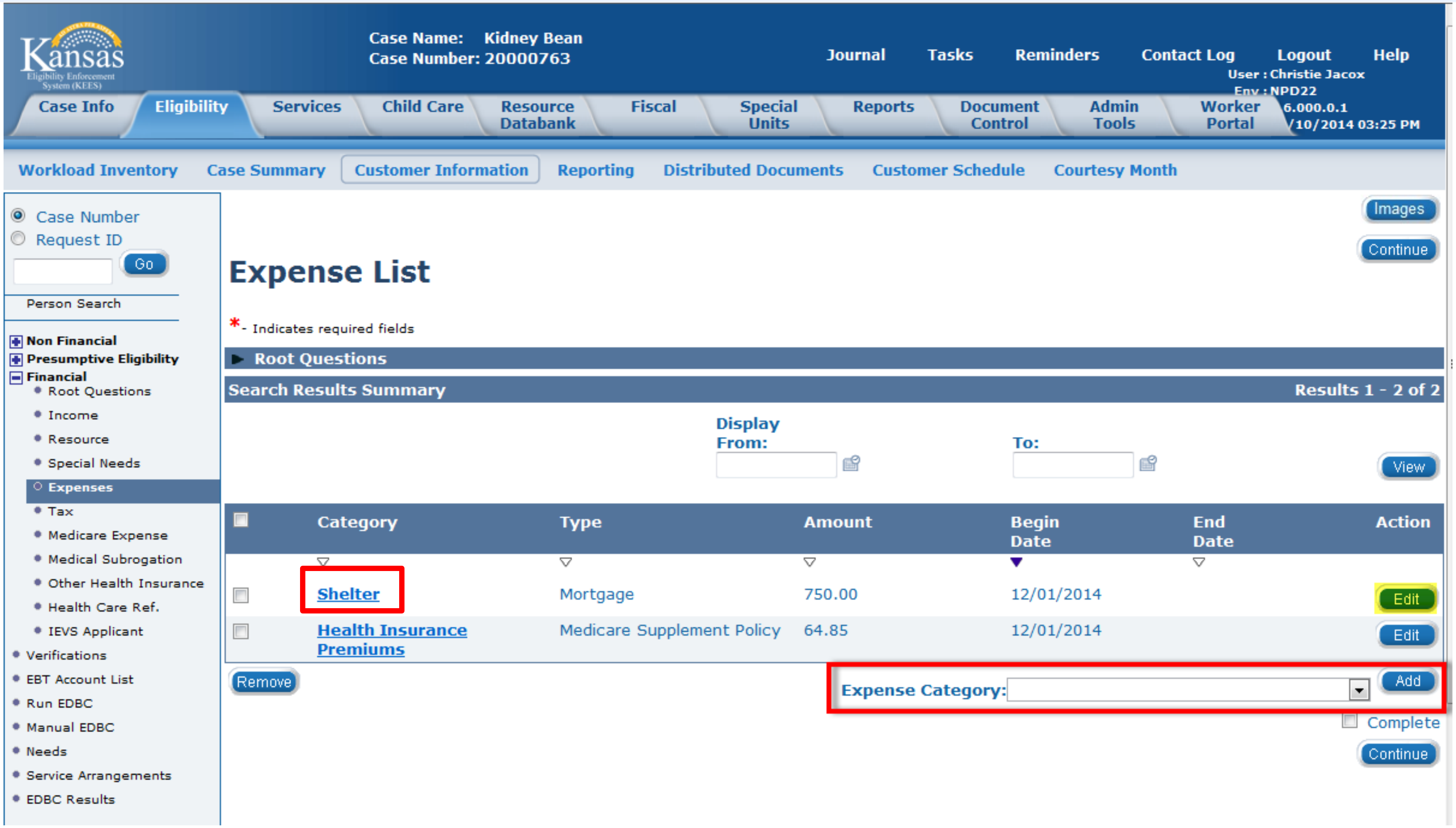
The Expense List page is where medical expenses are captured.

Medical expenses are used to reduce consumer costs for spenddowns and long term care liabilities.

Expense information is shared data. There is no field to select Medical or Non-Medical program. Since this information is stored at the consumer level, when expenses are updated the information will apply to all programs on all cases where the consumer is a member.

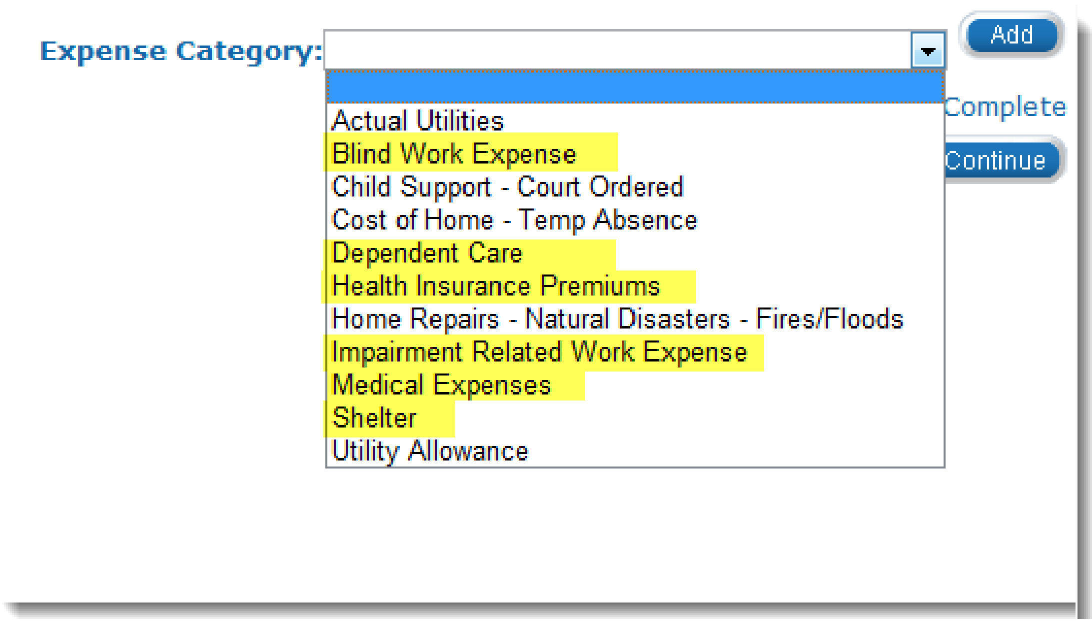
Medical Eligibility: Data Collection - Financial Information

Lesson 4: Expenses > Expense List Page



Once **Expenses** is selected on the Task Navigation, the **Expense List** page appears. It is from this screen that expense records can be viewed, edited, or added.

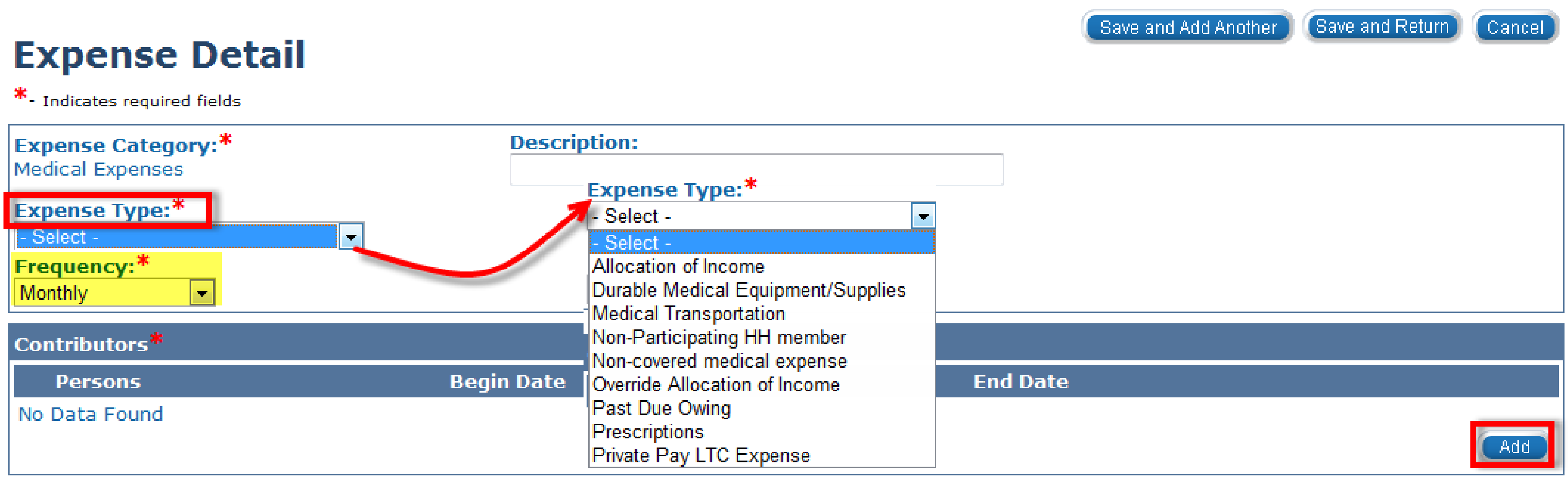
The **Expense Category** drop-down includes:



This page is shared between Medical & Non-Medical programs. The **Expense Categories** that are used for Medical programs have been highlighted.

On the **Expense Detail** page:

- Select the **Expense Type** from the drop-down menu.
  - The Type field is dynamic and options available will depend on the **Category** selected.
- **Frequency** will default to **Monthly.**
- Click **Add** in the **Contributors** block.



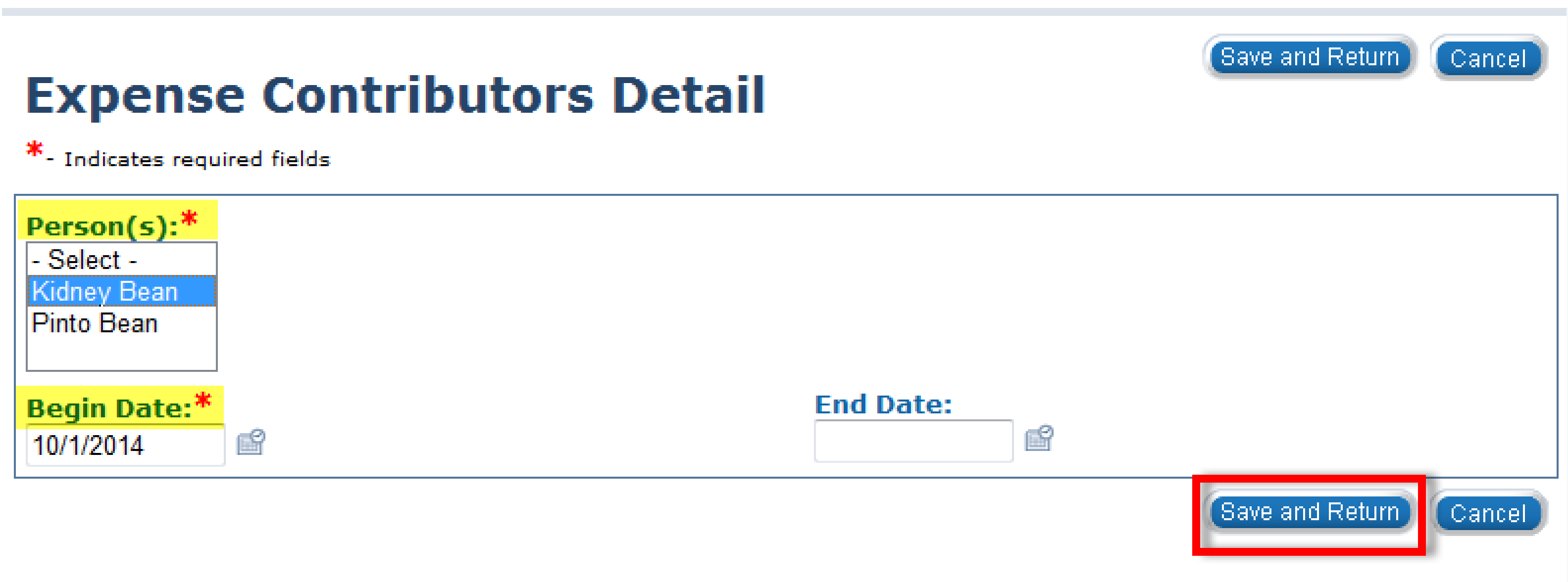
Kansas Eligibility Enforcement System (KEES)

Medical Eligibility: Data Collection - Financial Information

Lesson 4: Expenses > Expense Contributors Detail Page – Adding a Record

On the **Expense Contributors Detail** page:

- Select the name of the **Person**.
  - This field is multi-select; however, for medical expenses only select one person.
- Enter the **Begin Date**.
- Click **Save and Return**.

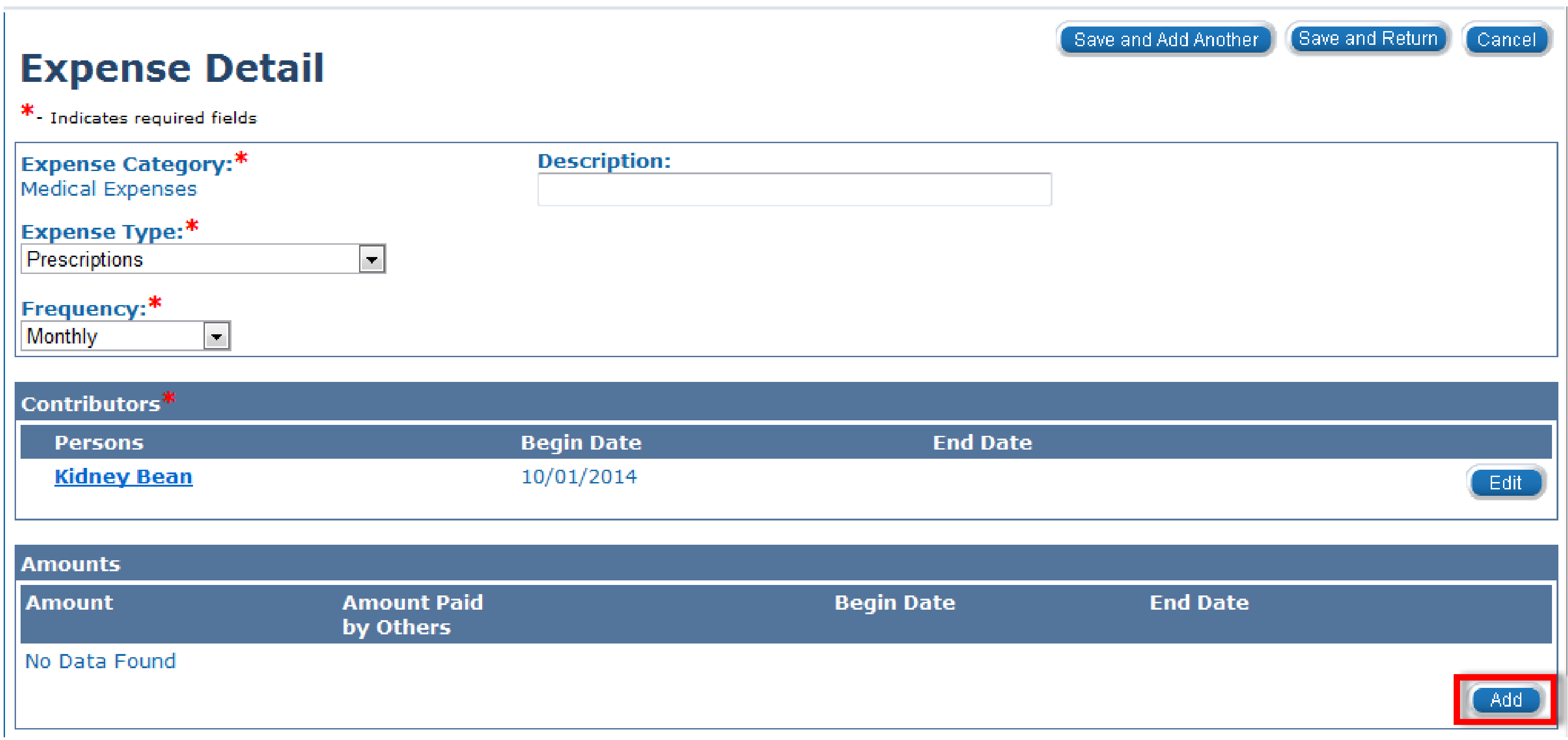


Medical Eligibility: Data Collection - Financial Information

Lesson 4: Expenses > Expense Detail Page – Adding a Record

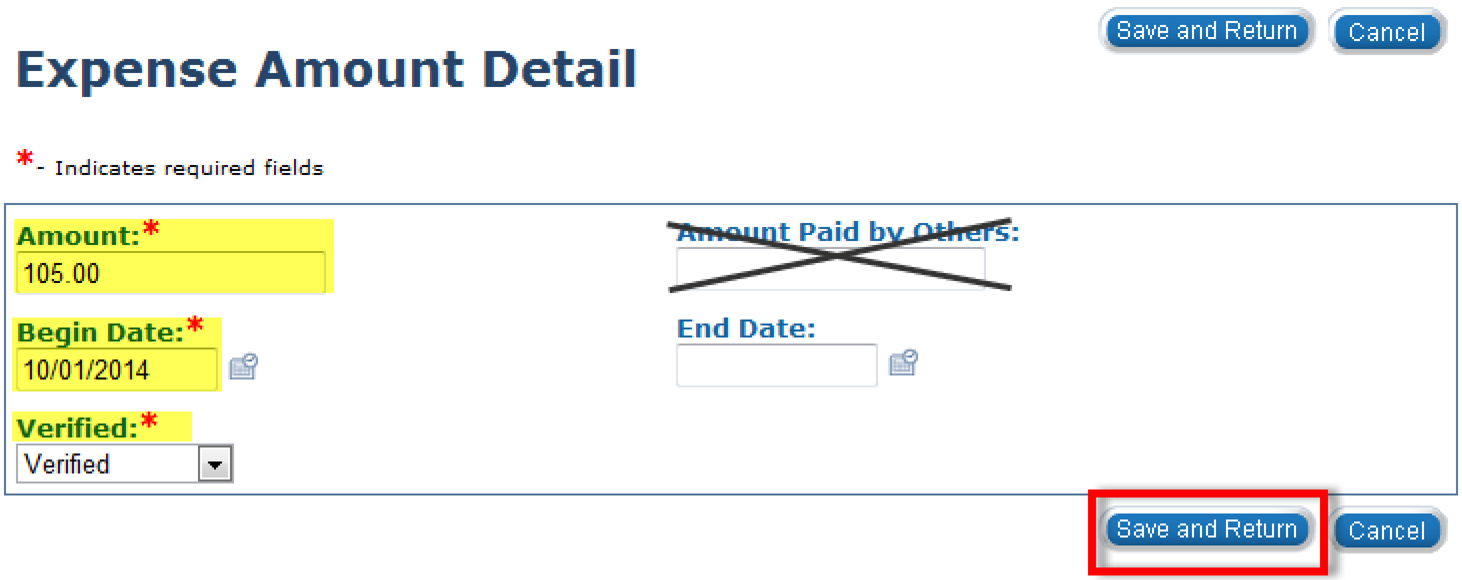
On the **Expense Detail** page:

- Click **Add** in the **Amount** block.



On the **Expense Amount Detail** page:

- Enter the **Amount**.
- Enter the **Begin Date**.
- Select a **Verified** value from the drop-down list.
- Click **Save and Return**.

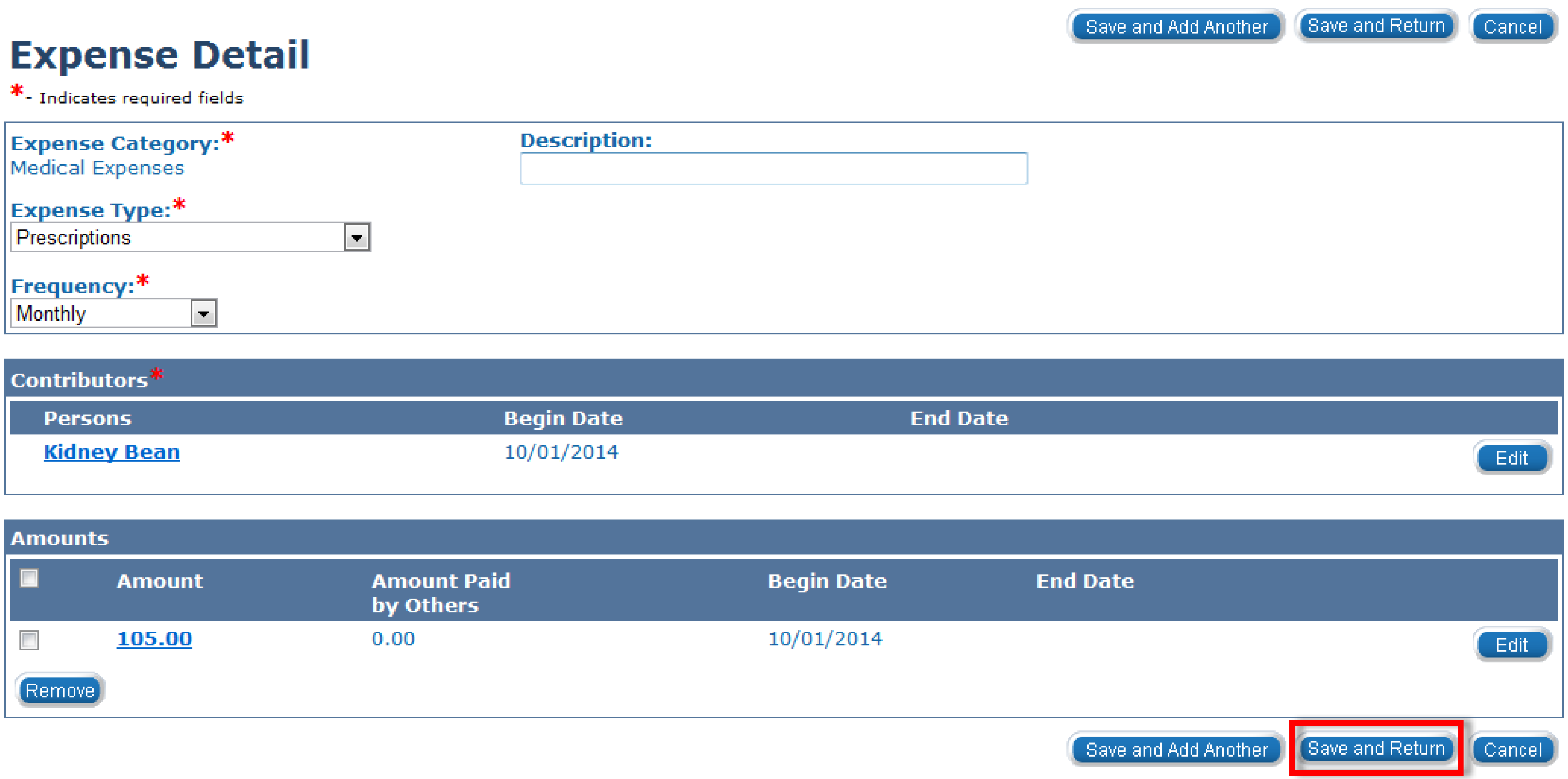


Medical Eligibility: Data Collection - Financial Information

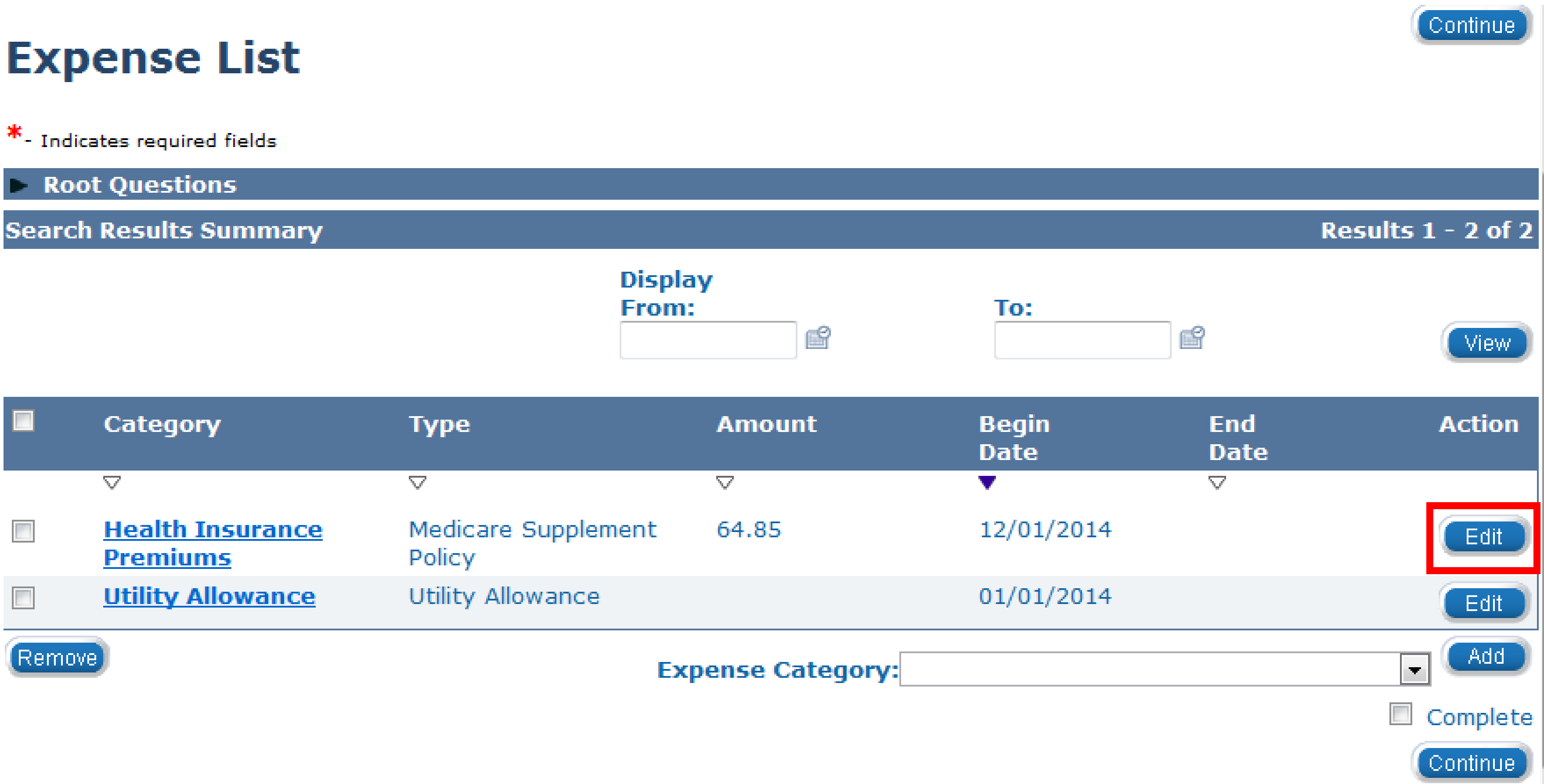
Lesson 4: Expenses > Expense Detail Page – Adding a Record

Review the information on the **Expense Detail** page:

- Select **Save and Return.**
  - If there are additional expenses, click **Save and Add Another.**



When a change is reported for an existing expense, it will be necessary to **Edit** the record.



Medical Eligibility: Data Collection - Financial Information

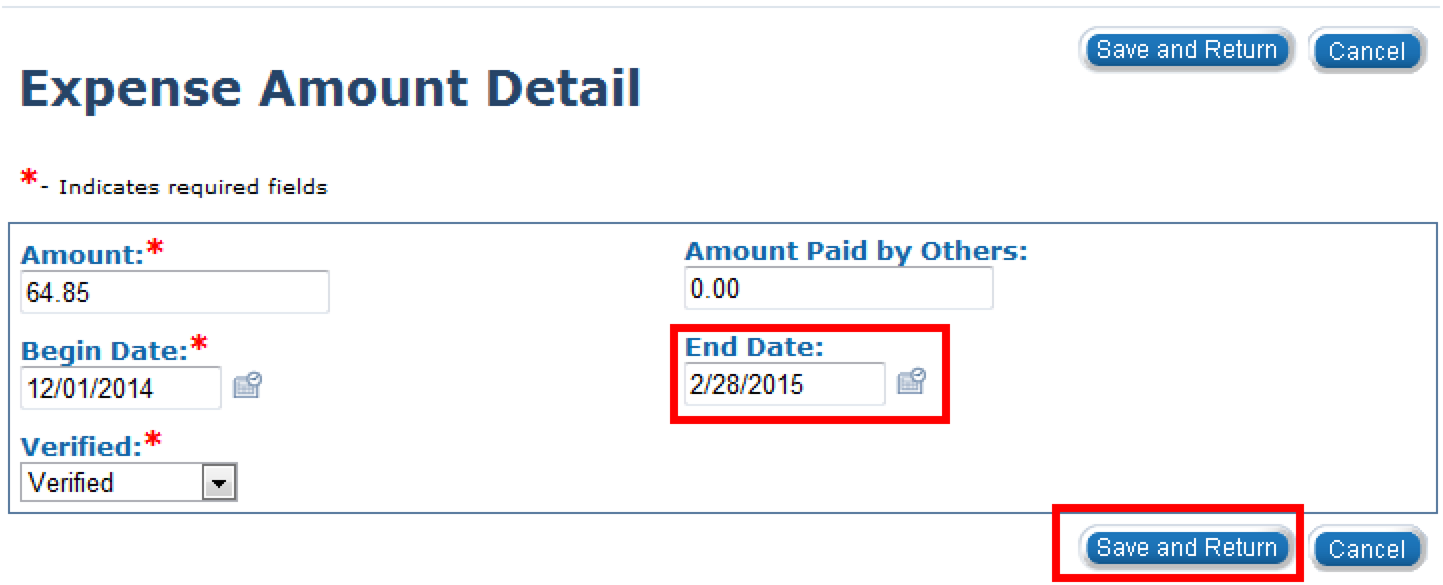
Lesson 4: Expenses > Expense Detail Page – End Dating a Record

On the **Expense Detail** page under the **Amounts** block:

- Click the **Edit** button.

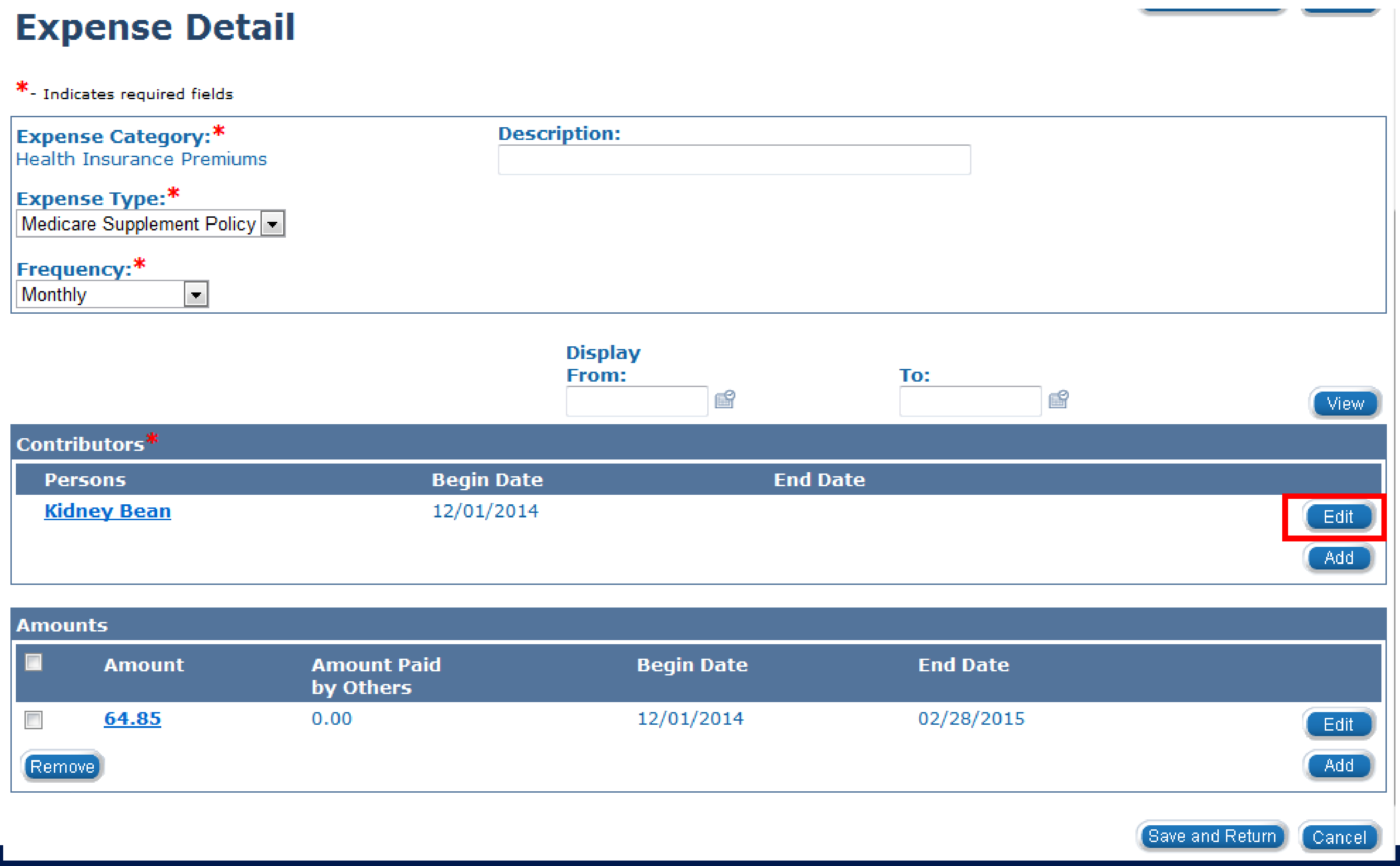
On the **Expense Amount Detail** page:

- Enter the **End Date**.
- Click **Save and Return**.



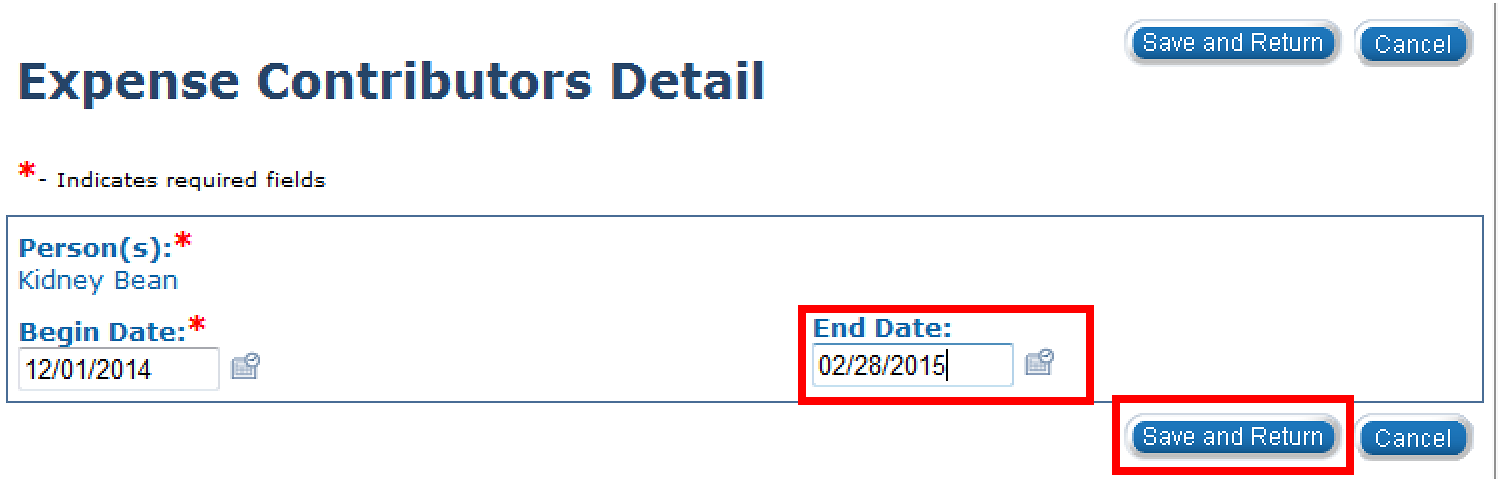
On the **Expense Detail** page under the **Contributors** block:

- Click the **Edit** button.



On the **Expense Contributors Detail** page:

- Enter the **End Date**.
- Click **Save and Return**.

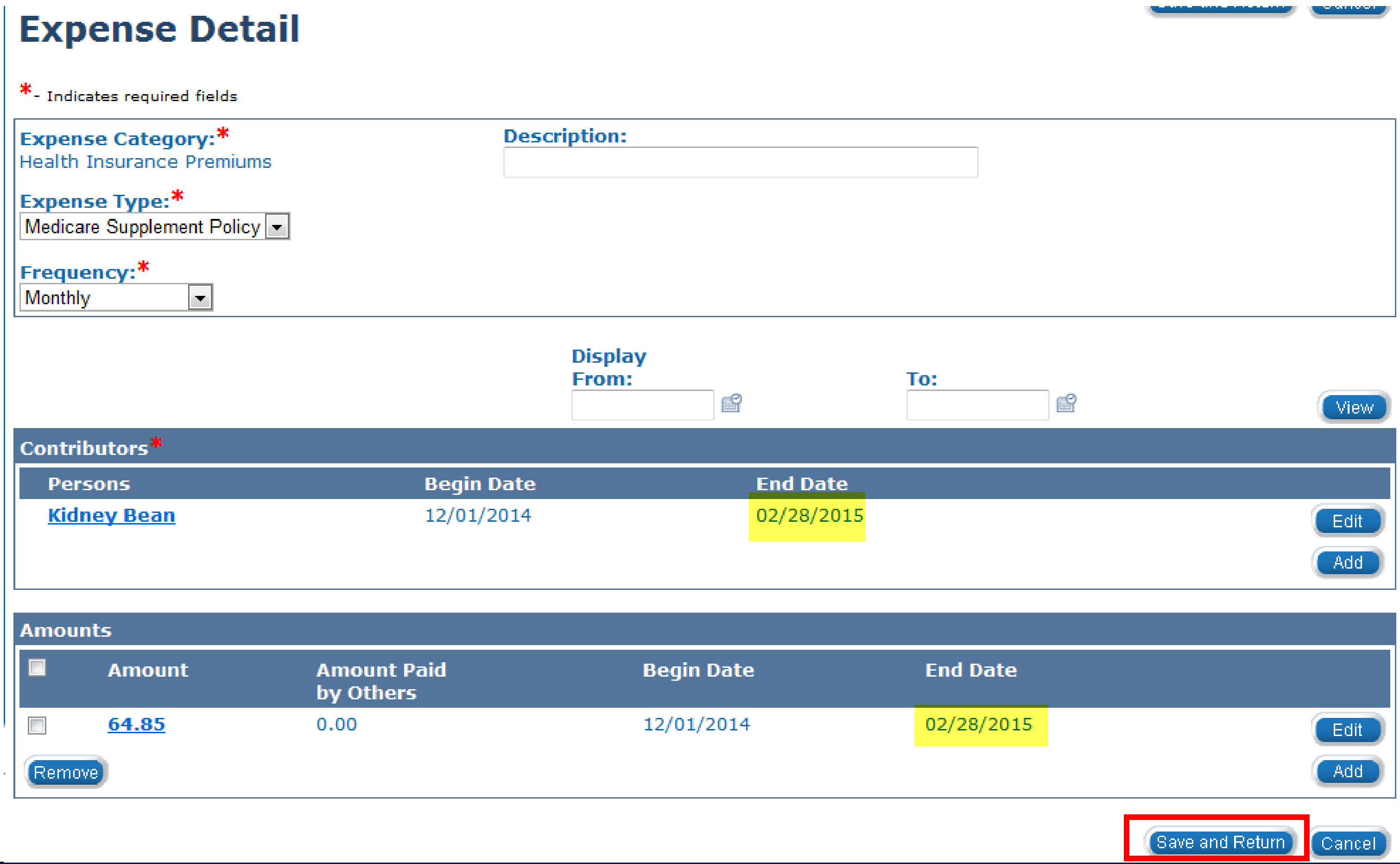


Medical Eligibility: Data Collection - Financial Information

Lesson 4: Expenses > Expense Detail – End Dating a Record

On the **Expense Detail** page:

- Click the **Save and Return** button.



That record will now show on the **Expense List** page with an **End Date**.

Images

Continue

Expense List

*- Indicates required fields

▶ Root Questions

Search Results Summary — **Results 1 - 3 of 3**

Display From: **To:** View

	Category	Type	Amount	Begin Date	End Date	Action
☐	Health Insurance Premiums	Medicare Supplement Policy	64.85	12/01/2014	02/28/2015	Edit
☐	Shelter	Rent	650.00	10/01/2014		Edit
☐	Utility Allowance	Utility Allowance		01/01/2014		Edit

Remove

Expense Category: Add

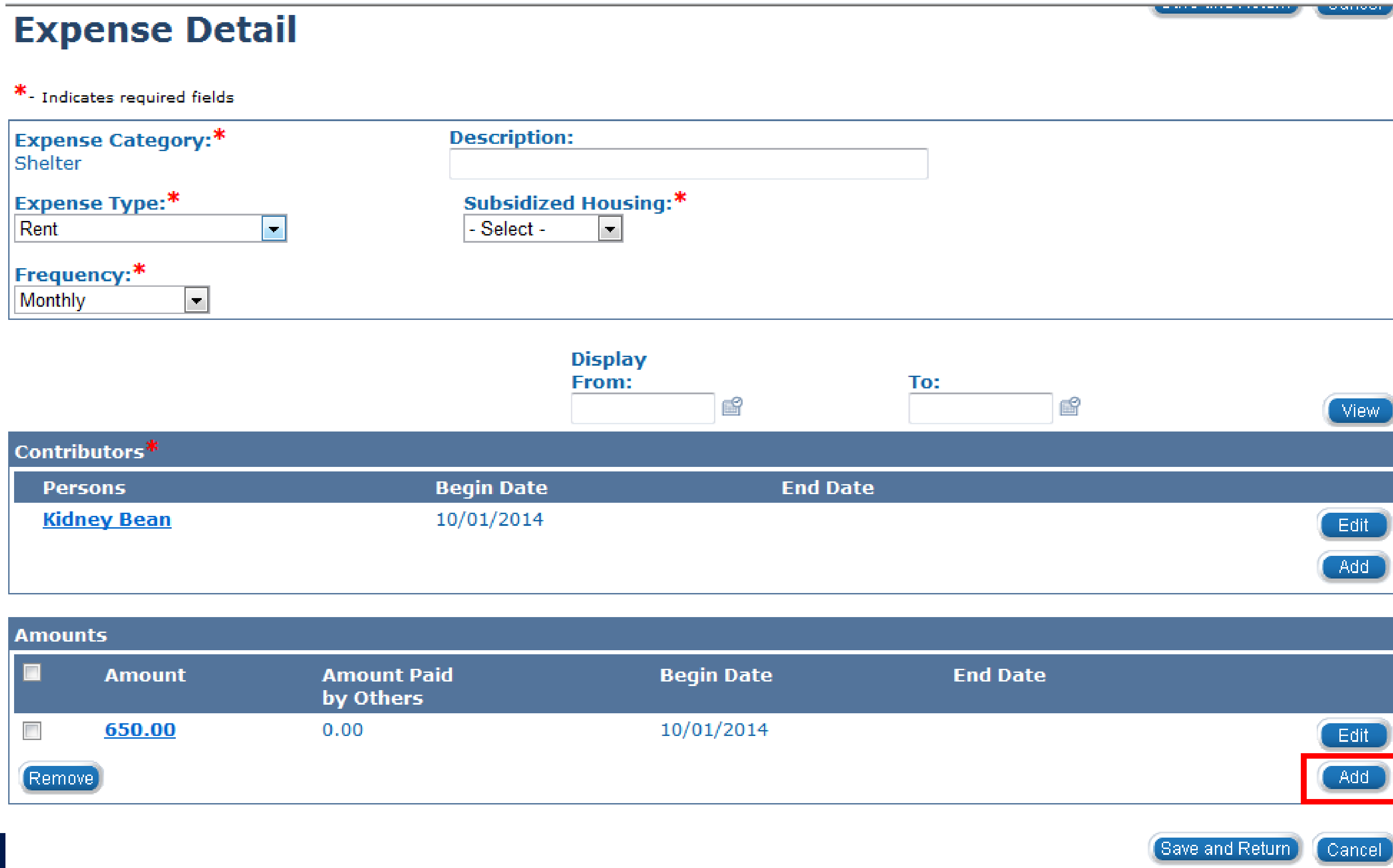
☐ Complete

Continue

Click **Edit** next to the record you wish to update.

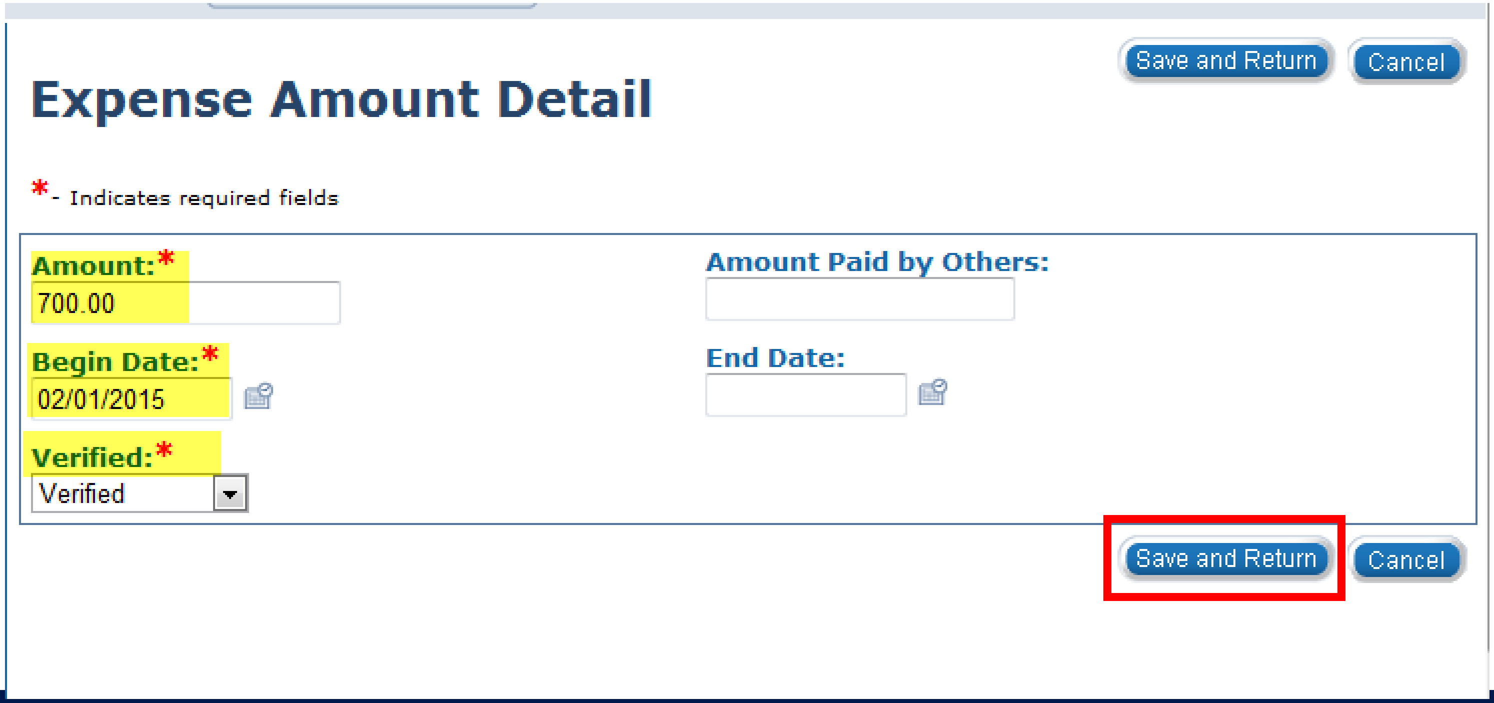
On the **Expense Detail** page under the **Amounts** block:

- Click the **Add** button.



On the **Expense Amount Detail** page:

- Enter the **Amount**.
- Enter the **Begin Date**.
- Select a **Verified** value from the drop-down menu.
- Click **Save and Return**.



On the **Effective Dating Confirmation List** page:

- Verify the information and dates are accurate.
- Click the **Save** button.

Effective Dating Confirmation List

This is the record you have added or updated:

Amount	Begin Date	End Date
700.00	02/01/2015	

The system will make corrections to your additions/updates:

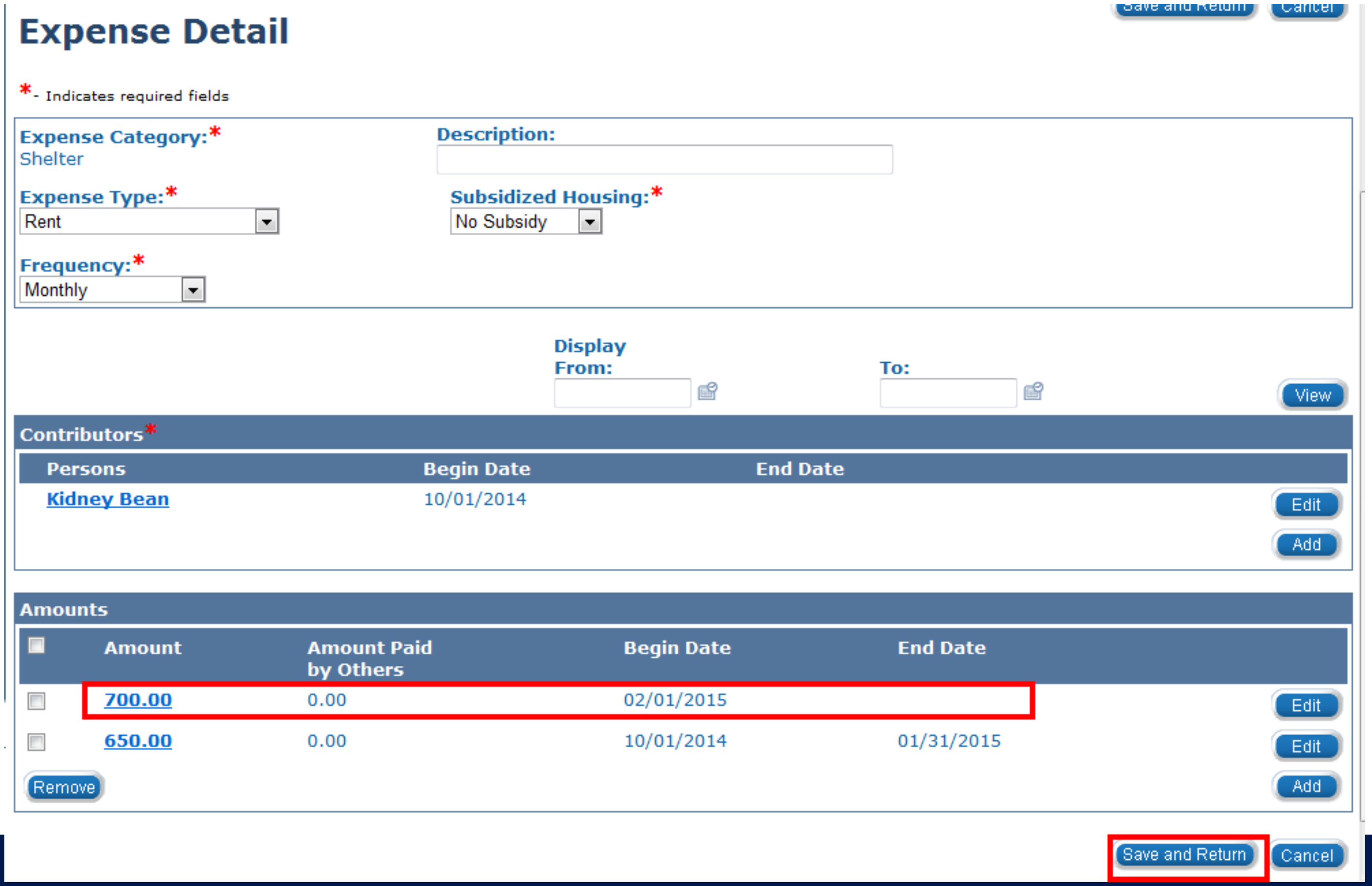
The system will adjust the effective dates of this record:

Amount	Begin Date	End Date
650.00	10/01/2014	01/31/2015

Click Save to continue or Cancel to undo this action. Save Cancel

On the **Expense Detail** page:

- Verify all mandatory fields are complete.
- Click **Save and Return**.



Medical Eligibility: Data Collection - Financial Information

Lesson 4: Expenses > Expense List Page – Effective Dating

Images

Continue

Expense List

*- Indicates required fields

▶ Root Questions

Search Results Summary — **Results 1 - 4 of 4**

Display From: To: View

	Category	Type	Amount	Begin Date	End Date	Action
☐	Health Insurance Premiums	Medicare Supplement Policy	64.85	12/01/2014	02/28/2015	Edit
☐	Shelter	Rent	700.00	10/01/2014		Edit
☐	Shelter	Rent	650.00	10/01/2014		Edit
☐	Utility Allowance	Utility Allowance		01/01/2014		Edit

Remove

Expense Category: Add

☐ Complete

Continue

In this lesson you learned:

- What expenses are captured on the **Expenses** page
- How to add an expense record
- How to end date an expense record
- How to effective date an expense record

Agenda

Lesson 1: Financial Page Navigation

Lesson 2: Income

Lesson 3: Resources

Lesson 4: Expenses

Lesson 5: Tax

Lesson 6: Medicare Expense

Lesson 7: Medical Subrogation

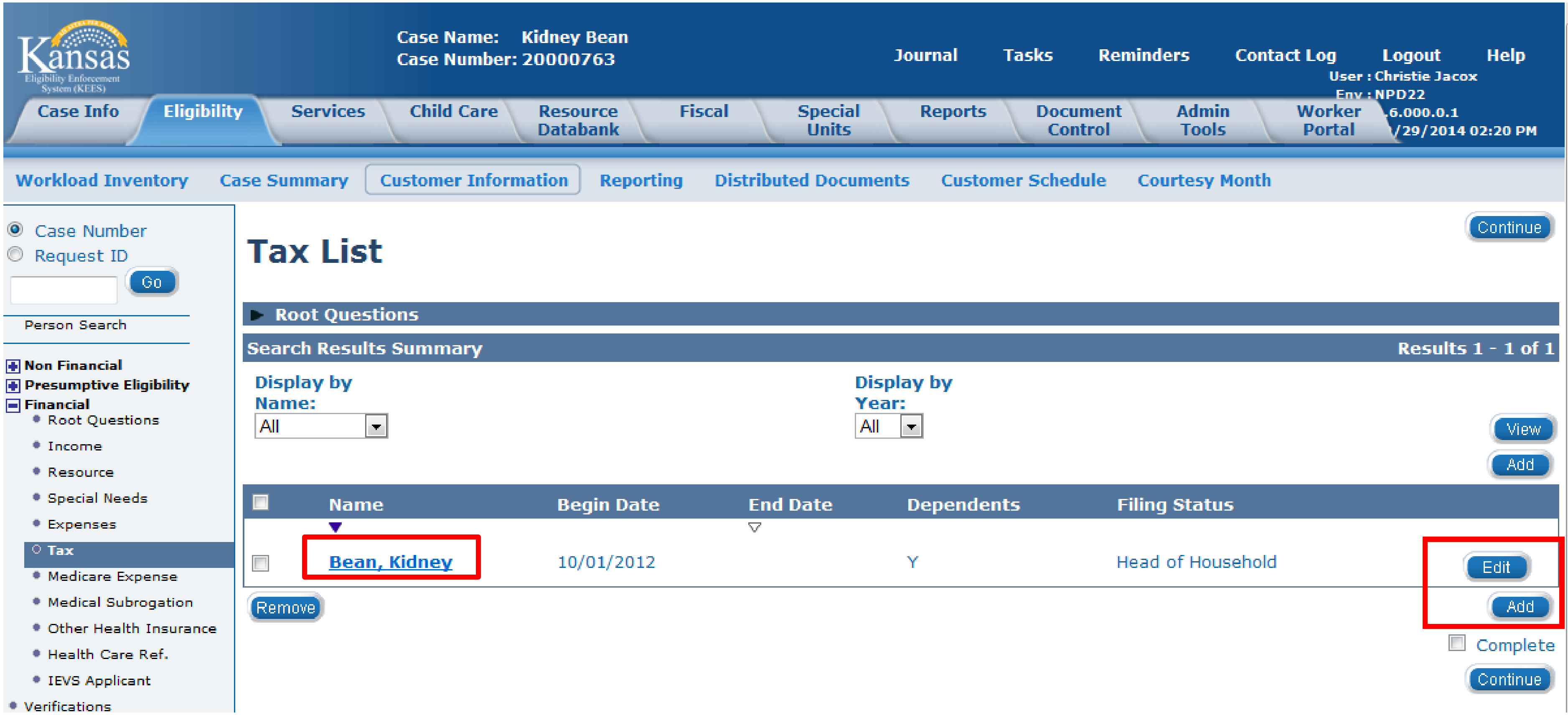
Lesson 8: Other Health Insurance

Lesson 5: Tax> Introduction

The **Tax** page is where KEES captures a consumer's tax information to be used in eligibility determinations and benefit calculations.

Medical Eligibility: Data Collection - Financial Information

Lesson 5: Tax > Tax List

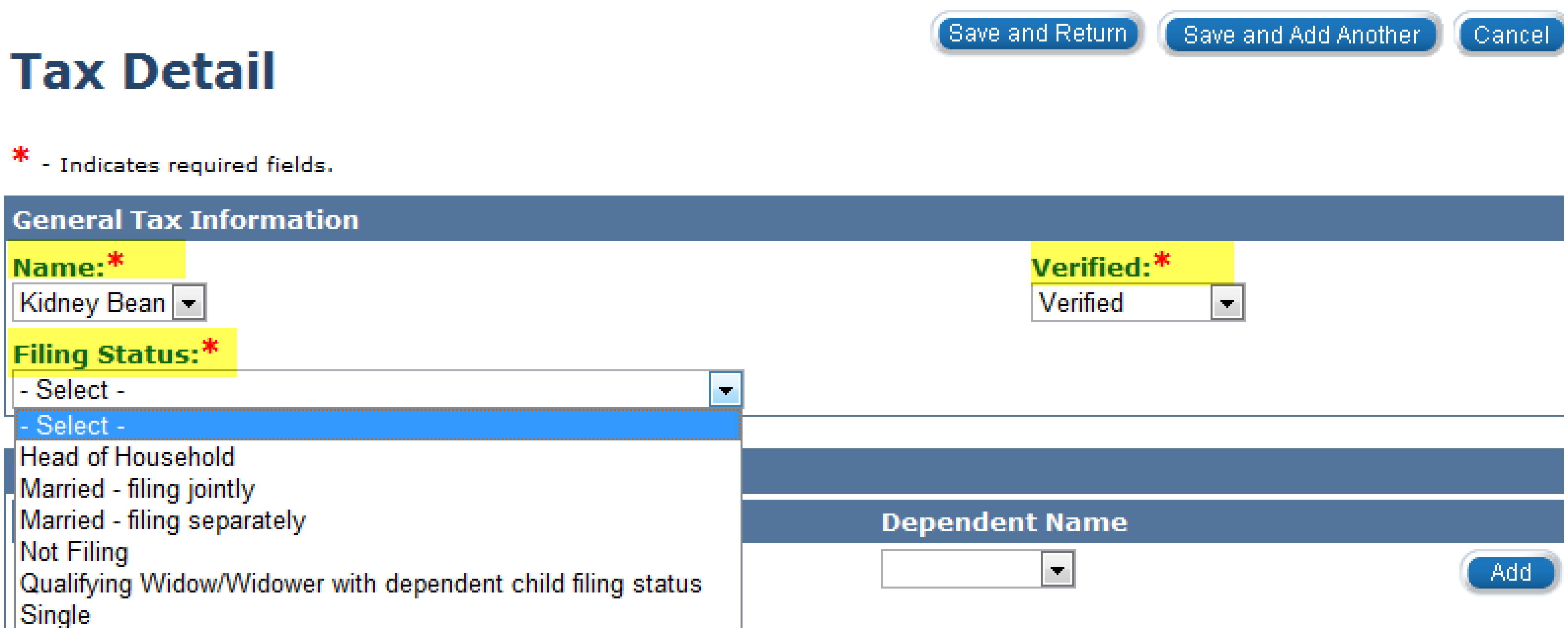


Once **Tax** is selected on the Task Navigation, the **Tax List** page appears. It is from this screen that Tax records can be viewed, edited, or added.

Lesson 5: Tax > Tax Detail

On the **Tax Detail** page:

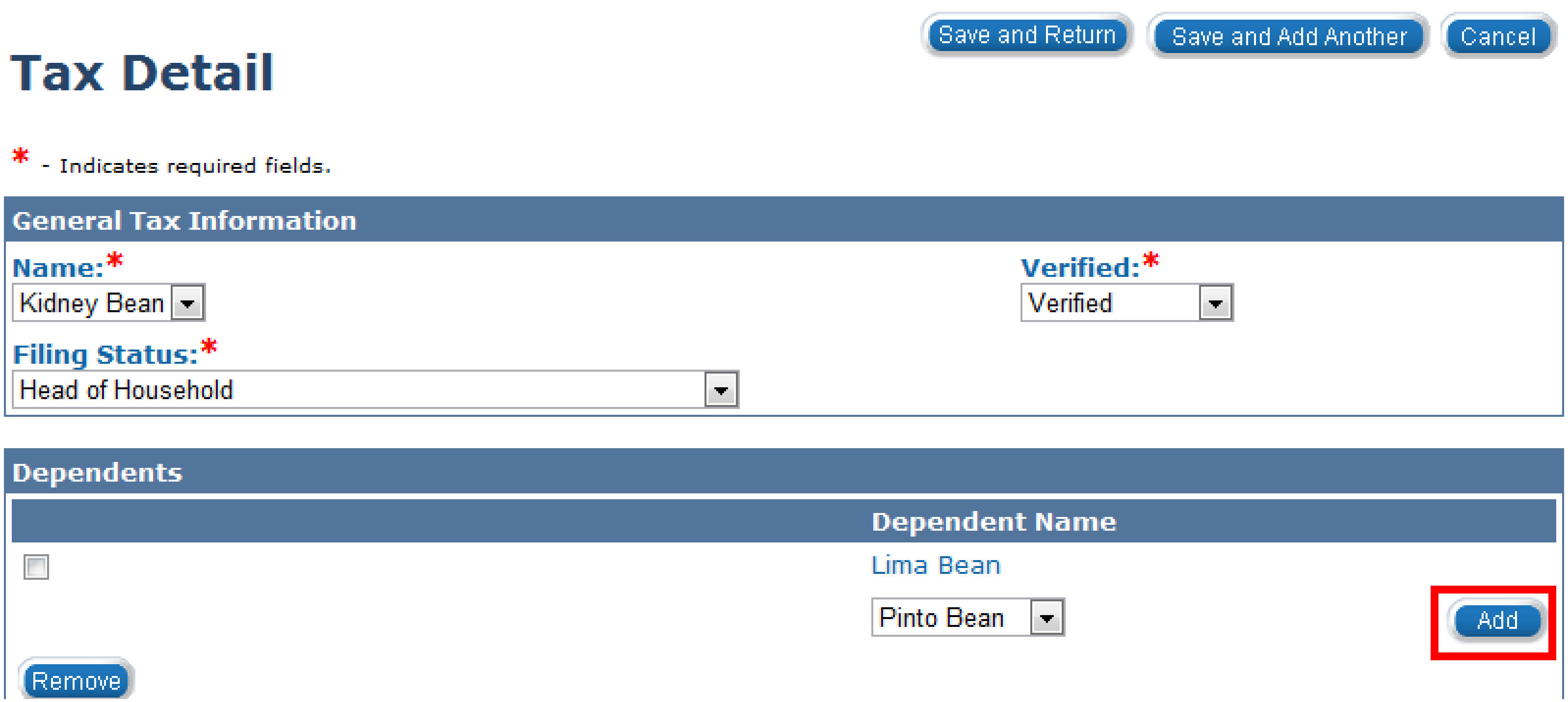
- Select the **Name** from the drop-down menu.
- Select the **Filing Status** from the drop-down menu.
- Select a **Verified** value from the drop-down menu.



Lesson 5: Tax > Tax Detail

On the **Tax Detail** page:

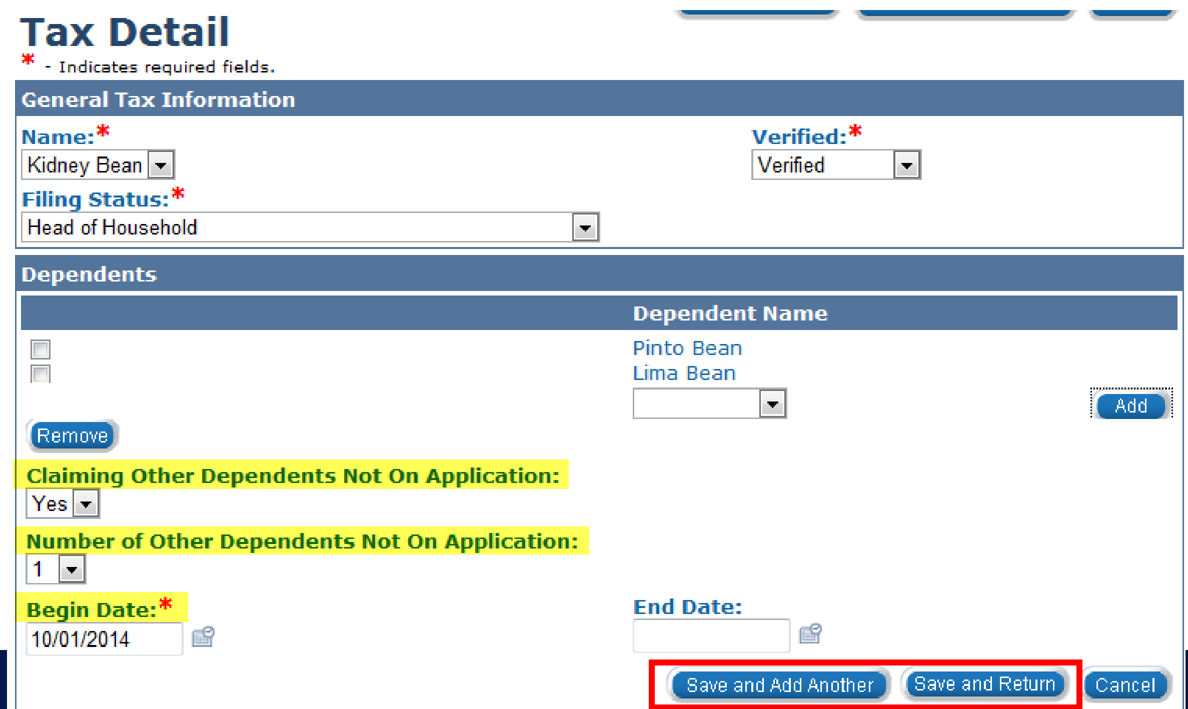
- Select the **Dependent Name** from the drop-down menu.
- Click **Add.**
  - Repeat these steps as many times as needed, until all the dependents associated with the case have been added to the tax record.



Lesson 5: Tax > Tax Detail

On the **Tax Detail** page:

- Select Yes or No from the **Claiming Other Dependents Not On Application** drop-down menu.
  - If **Yes**, select the **Number of Other Dependents Not On Application**.
  - If **No**, no other information is needed.
- Enter the **Begin Date.**
- Select **Save and Return.**
  - If there are additional tax records, click **Save and Add Another.**



In this lesson you learned:

- How to add a Tax record

Agenda

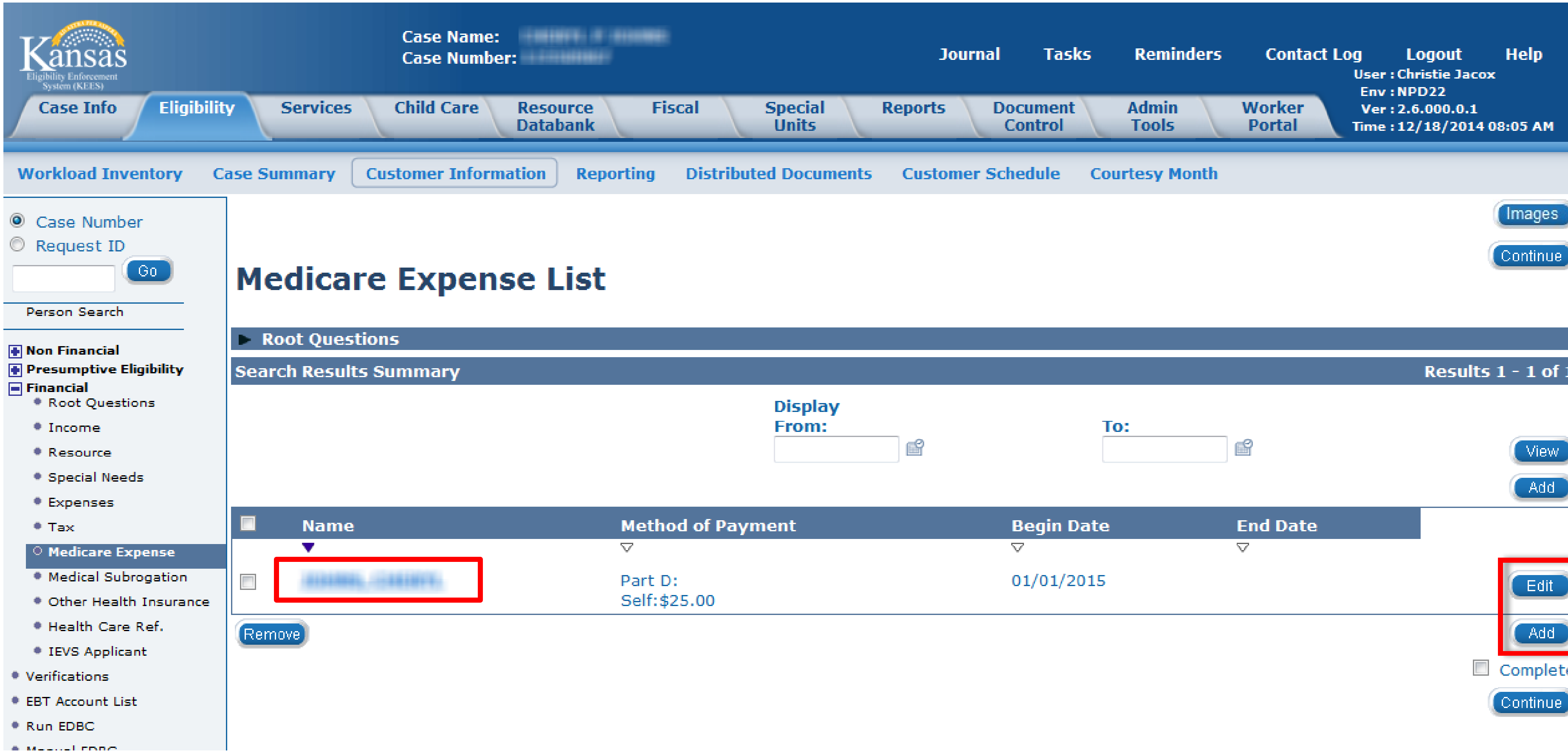
Lesson 1: Financial Page Navigation
Lesson 2: Income
Lesson 3: Resources
Lesson 4: Expenses
Lesson 5: Tax
Lesson 6: Medicare Expense
Lesson 7: Medical Subrogation
Lesson 8: Other Health Insurance

Lesson 6: Medicare Expenses > Introduction

The **Medicare Expense** page is where KEES captures a consumer's Medicare *expense* information to be used in eligibility determinations and benefit calculations.

NOTE: Medicare *eligibility* information is captured on the **Medicare Information** page. The **Medicare Information** page is populated by an Interface with SSA, and is not editable.

Lesson 6: Medicare Expenses > Medicare Expense List



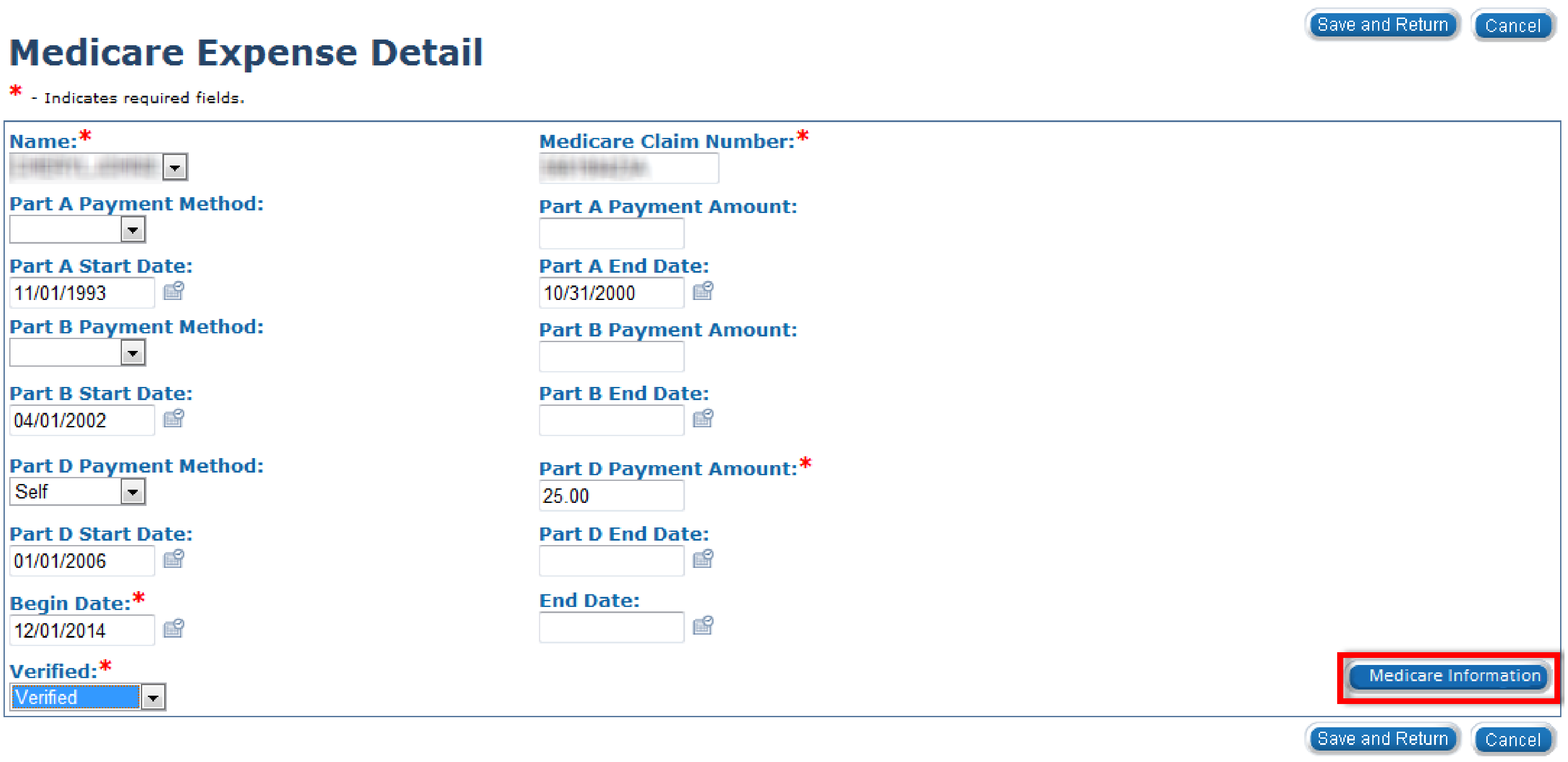
Once **Medicare Expense** is selected on the Task Navigation, the **Medicare Expense List** page appears. It is from this screen that Medicare expense records can be viewed, edited, or added.

Medical Eligibility: Data Collection - Financial Information

Lesson 6: Medicare Expenses > Medicare Expense Detail

On the **Medicare Expense Detail** page (after clicking **Edit**):

- Click the **Medicare Information** button.



The **Medicare Information** page data is populated from interface details. This page is view only. Any information edited, removed, or added on the **Medicare Expense Detail** page will not impact this page.

Medicare Information

Medicare Name	SSN	DOB	Medicare Claim Number
[illegible]	[illegible]	[illegible]	[illegible]

Medicare Information Part A header

Part A Entitlement Date	Part A Entitlement End Date		
4/1/2002	12/31/2299		
Part A Entitlement Status	**Part A 3rd Party Premium Payer**	**Payer Start Date:**	**Payer End Date:**

Medicare Information Part B header

Part B Entitlement Date	Part B Entitlement End Date		
4/1/2002	12/31/2299		
Part B Entitlement Status	**Part B 3rd Party Premium Payer**	**Payer Start Date:**	**Payer End Date:**

Medicare Information Part D header

Part D Start Date:	Part D End Date:	Part D Opt-Out Indicator:	Retiree Drug Subsidy Start Date:	RDS Term. Date:
1/1/2006	12/31/2299			

Other Medicare Information Header

End Stage Renal Disease Start Date	End Stage Renal Disease End Date
Verified	

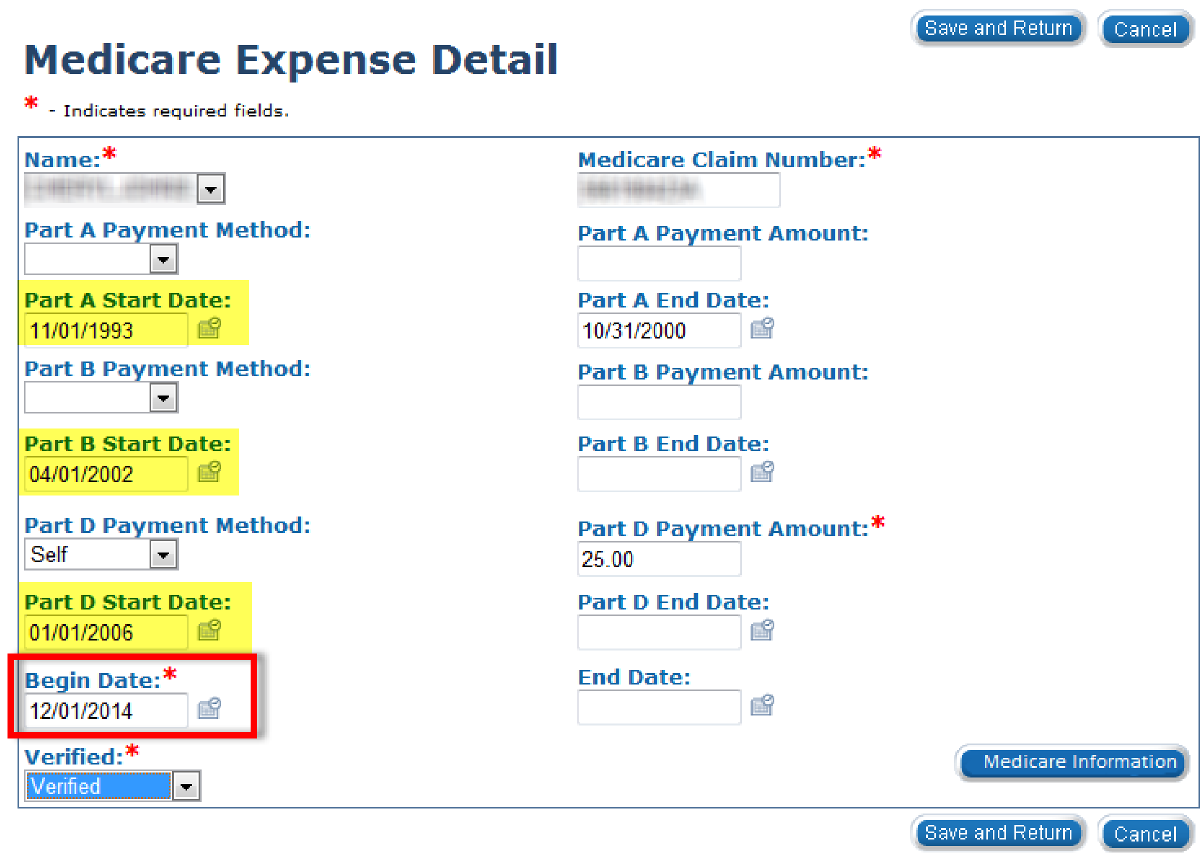
Return

Medical Eligibility: Data Collection - Financial Information

Lesson 6: Medicare Expenses > Medicare Expense Detail-Editing

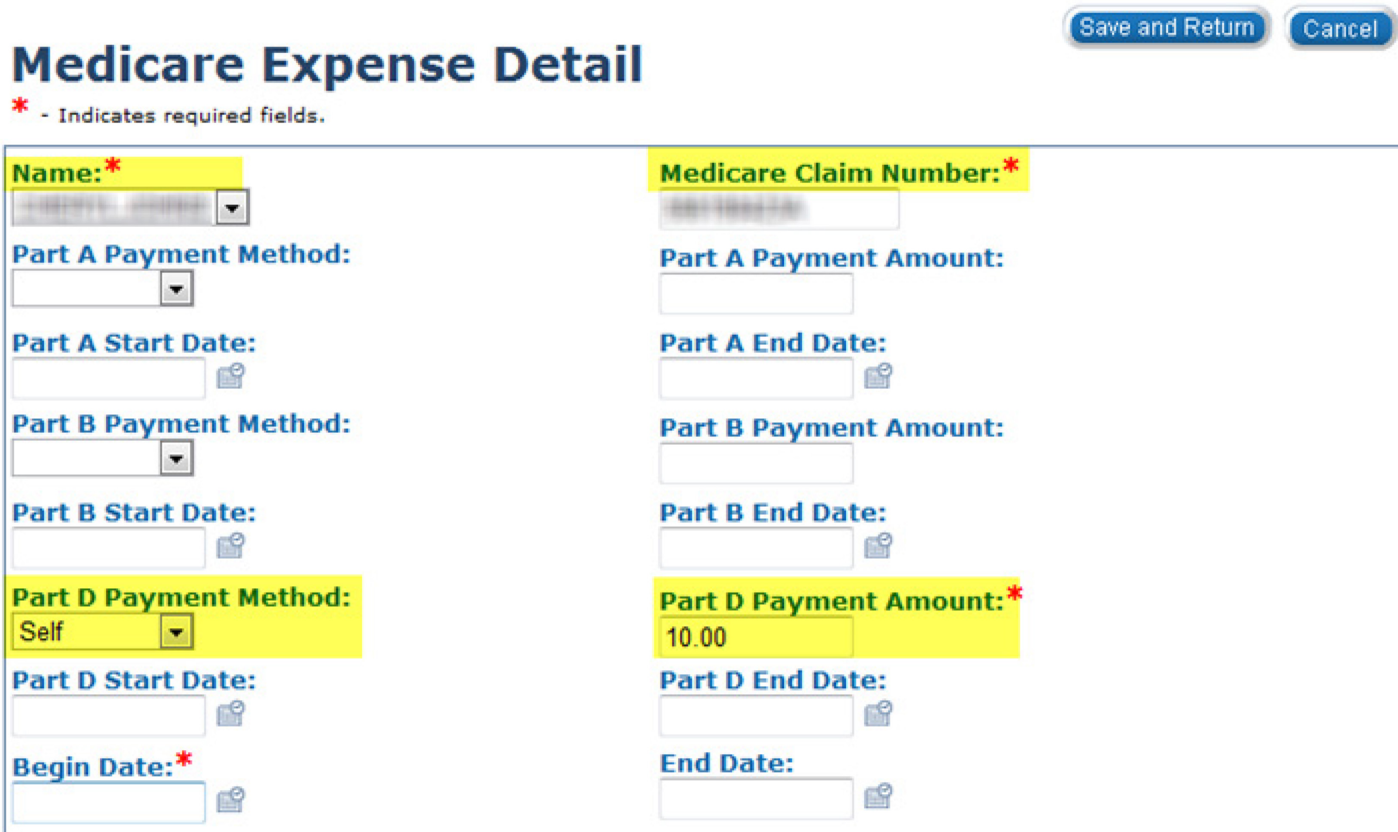
On the **Medicare Expense Detail** page (when editing a record):

- The **Start Date** is typically one of the fields populated from the interface.
- The **Begin Date** will occasionally be populated with the Medicare A start date. This can and should be changed to the first day of the application month when allowing a Medicare Expense.



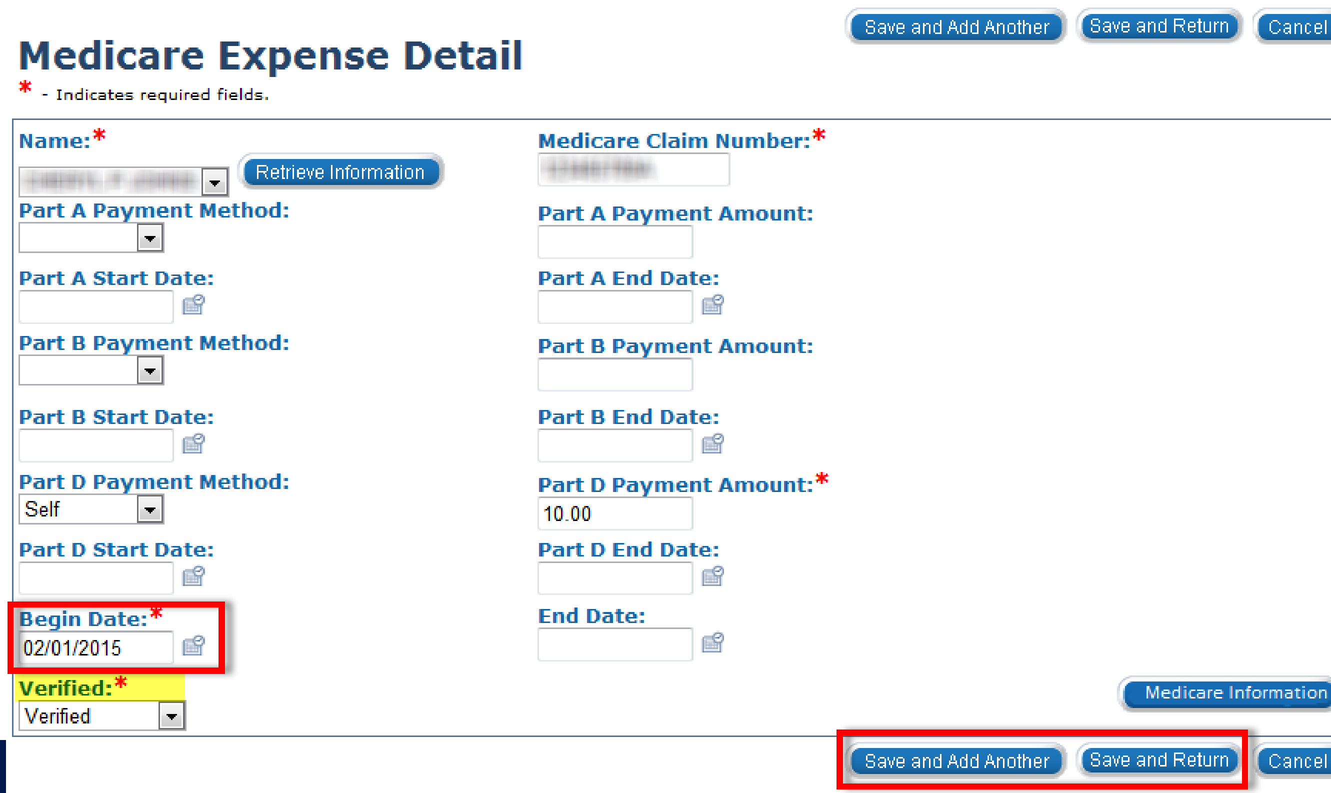
On the **Medicare Expense Detail** page (when adding a record):

- Select the **Name** from the drop-down menu.
- Enter the **Medicare Claim Number** and all known **Part A, Part B,** and **Part D** information.



On the **Medicare Expense Detail** page (when adding a record):

- Enter the **Begin Date**
- Select a **Verified** value from the drop-down menu.
- Select **Save and Return.**
  - If there are additional Medicare expenses for another consumer, click **Save and Add Another**

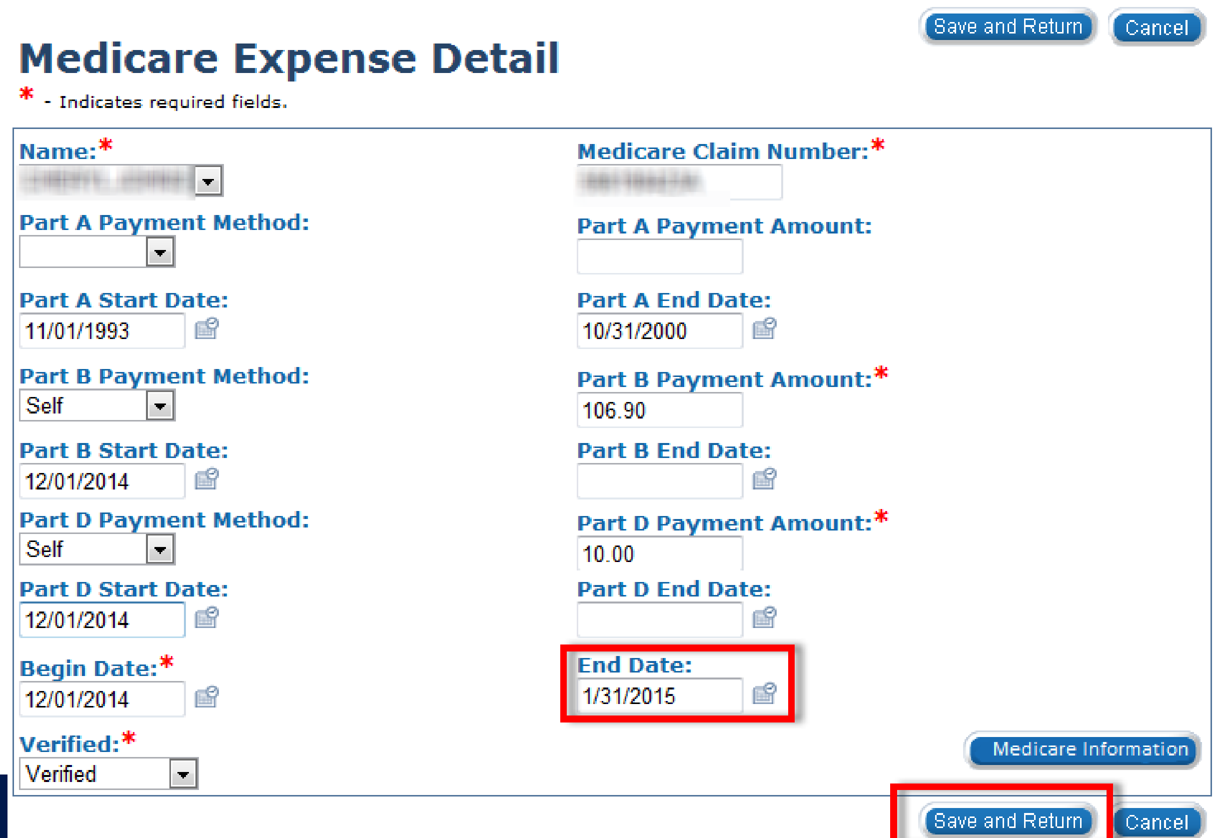


Medical Eligibility: Data Collection - Financial Information

Lesson 6: Medicare Expenses > Medicare Expense Detail-Editing

On the **Medicare Expense Detail** page (when editing a record):

- When their Medicare Savings Plan begins or when buy-in starts and there will no longer be a Medicare expense, simply enter the last day of the month the consumer is responsible for the expense in the **End Date**.
- After updating the begin/end date, click **Save & Return**.



Lesson 6: Medicare Expenses > Summary

In this lesson you learned:

- How to navigate to the **Medicare Information** page
- How to add a Medicare expense record
- How to edit an existing Medicare expense record

Agenda

Lesson 1: Financial Page Navigation

Lesson 2: Income

Lesson 3: Resources

Lesson 4: Expenses

Lesson 5: Tax

Lesson 6: Medicare Expense

Lesson 7: Medical Subrogation

Lesson 8: Other Health Insurance

Lesson 7: Medical Subrogation > Introduction

The Medical Subrogation page is used for capturing information when there is a possibility to recover medical expenses from a third party. This is when an entity outside of Medicaid or another health insurance is responsible for a consumer's medical costs.

After completing the Medical Subrogation page a task will be generated and sent to the Medical Subrogation/TPL unit to research if any other entity is responsible to pay a consumer's medical costs.

Medical Subrogation information is recorded when a consumer has sustained an injury and a third-party may be responsible for the medical expense(s). In these instances:

- a claim can be filed with an insurance entity
- a police report is filed for an injury.

A Medical Subrogation Injury should be recorded in KEES if a consumer:

- has been in an auto accident
- has been the victim of a crime
- has been injured at work
- has been injured in a public place or another's home

NOTE: For more information on when to complete Medical Subrogation: Injury information see KEESM 2910 and/or KFMAM 2531.

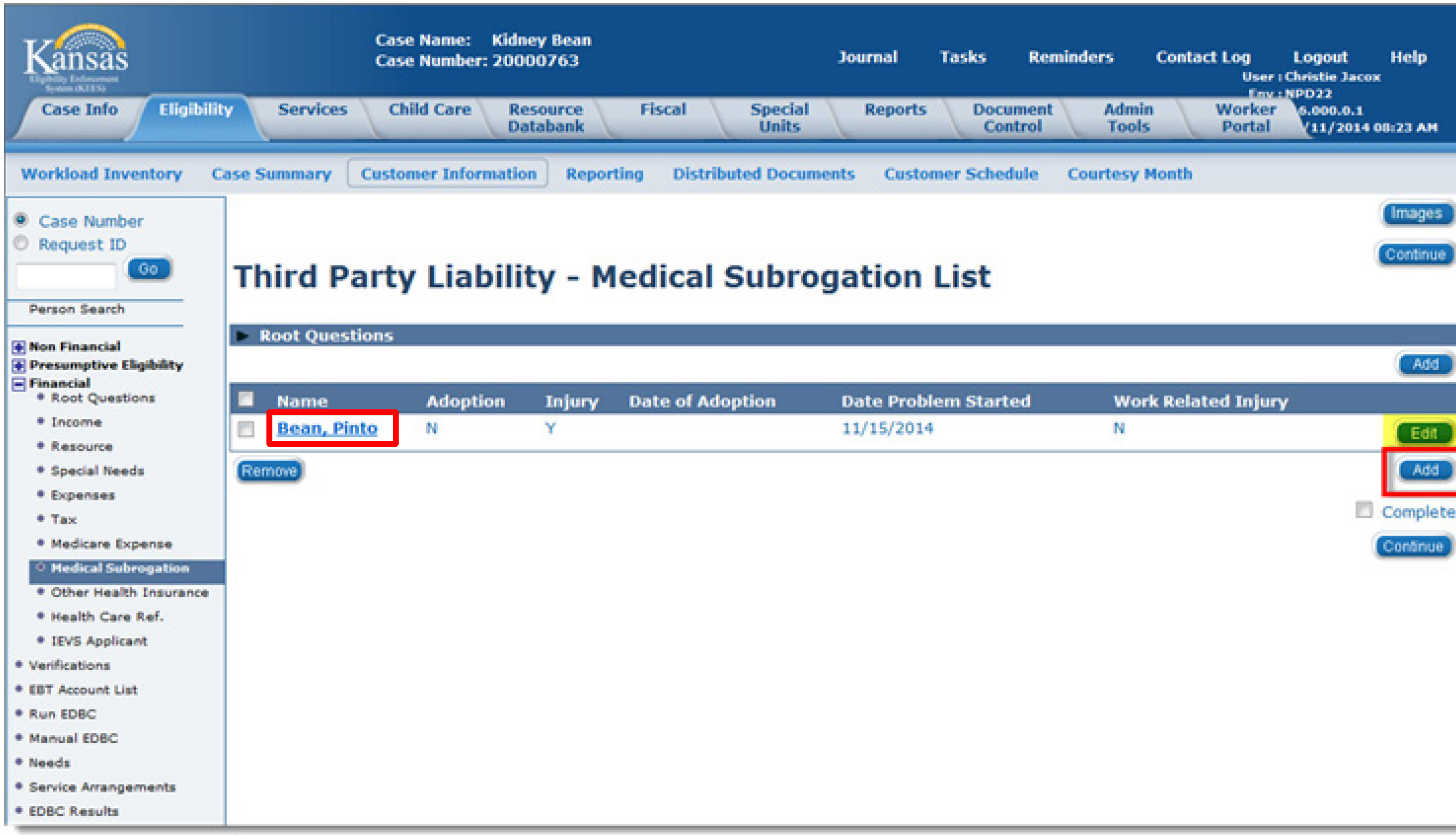
The Medical Subrogation page is also used, when a Medicaid consumer is adopted, to request assistance from Medical Subrogation staff to acquire TPL information from:

- uncooperative birth mothers
- adoption agencies
- adoptive parents

NOTE: For more information on when to complete Medical Subrogation: Adoption information see KEESM 2910 and/or KFMAM 2531.

Medical Eligibility: Data Collection - Financial Information

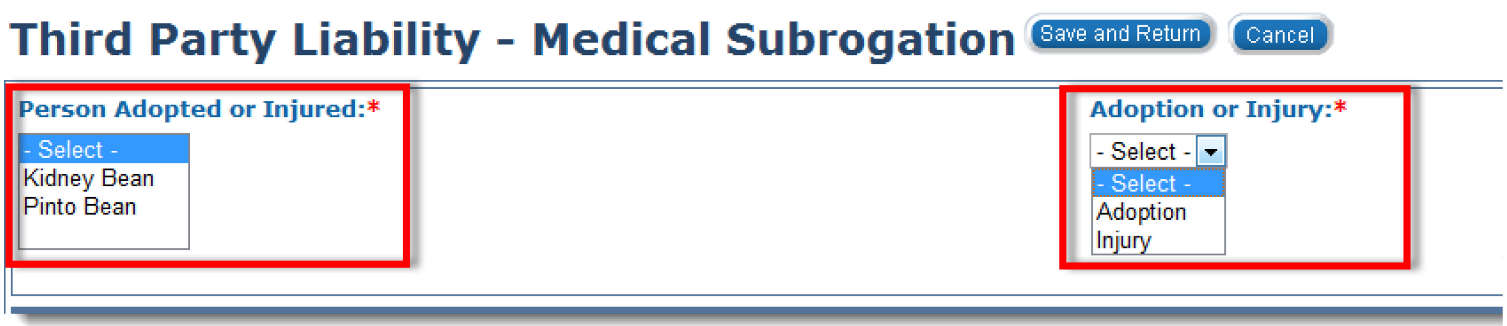
Lesson 7: Medical Subrogation > Third Party Liability – Medical Subrogation List



Once **Medical Subrogation** is selected on the Task Navigation, the **Third Party Liability – Medical Subrogation List** page appears. It is from this screen that medical subrogation records can be viewed, edited, or added.

On the **TPL – Medical Subrogation** page (after clicking **Add**):

- Select **Person Adopted or Injured** from the multi-select field.
- Select **Adoption or Injury** from the drop-down field.
  - After selecting either **Adoption** or **Injury**, only the Adoption or Injury block will display.

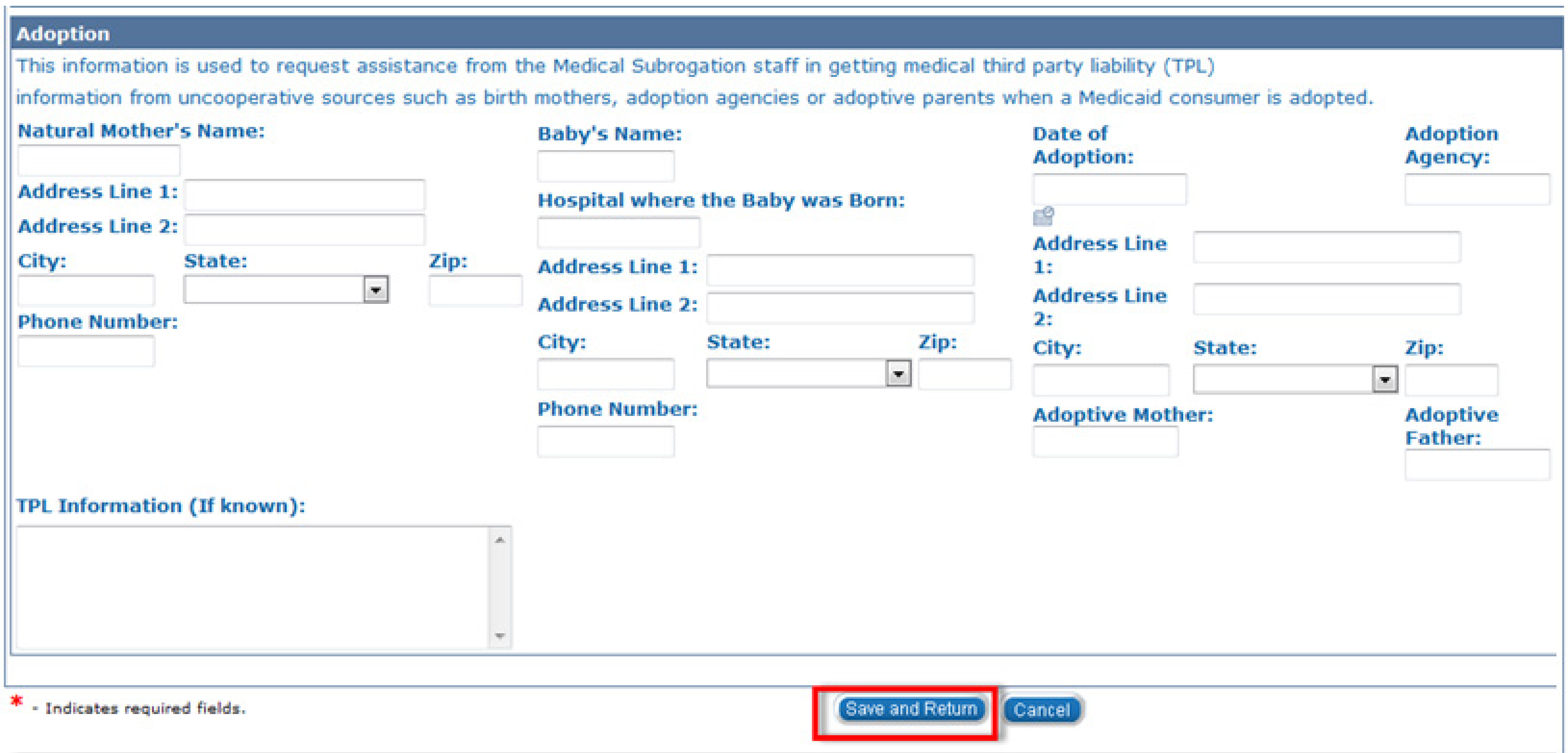


Medical Eligibility: Data Collection - Financial Information

Lesson 7: Medical Subrogation > Third Party Liability – Medical Subrogation List

On the **TPL – Medical Subrogation** page (under the **Adoption** block):

- Enter all known information.
- Select **Save and Return.**


Adoption

This information is used to request assistance from the Medical Subrogation staff in getting medical third party liability (TPL) information from uncooperative sources such as birth mothers, adoption agencies or adoptive parents when a Medicaid consumer is adopted.

Natural Mother's Name:
Address Line 1:
Address Line 2:
City: State: Zip:
Phone Number:

Baby's Name:
Hospital where the Baby was Born:
Address Line 1:
Address Line 2:
City: State: Zip:
Phone Number:

Date of Adoption:
Adoption Agency:
Address Line 1:
Address Line 2:
City: State: Zip:
Adoptive Mother:
Adoptive Father:

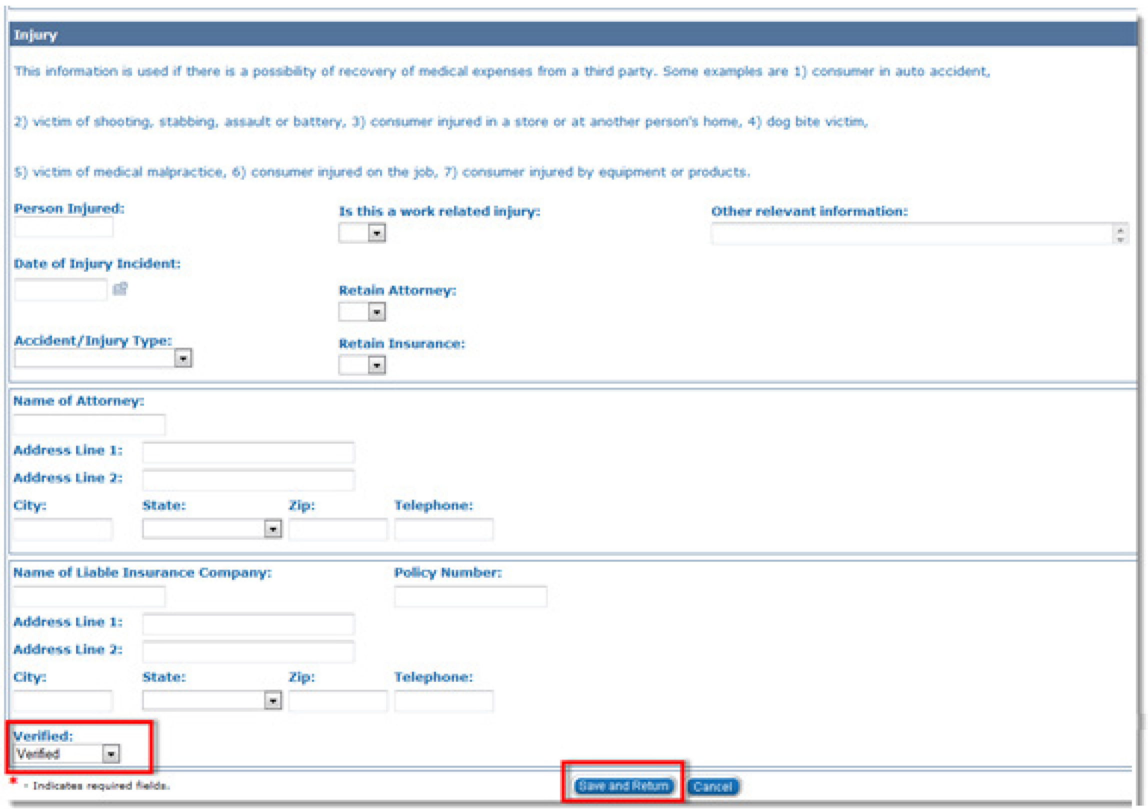
TPL Information (If known):

* - Indicates required fields.

Save and Return Cancel

On the **TPL – Medical Subrogation** page (under the **Injury** block):

- Enter all known information.
- Select a **Verified** Value from the drop-down list.
- Select **Save and Return.**



In this lesson you learned:

- How to add a third-party liability to the **Medical Subrogation** page for injury and adoption

Agenda

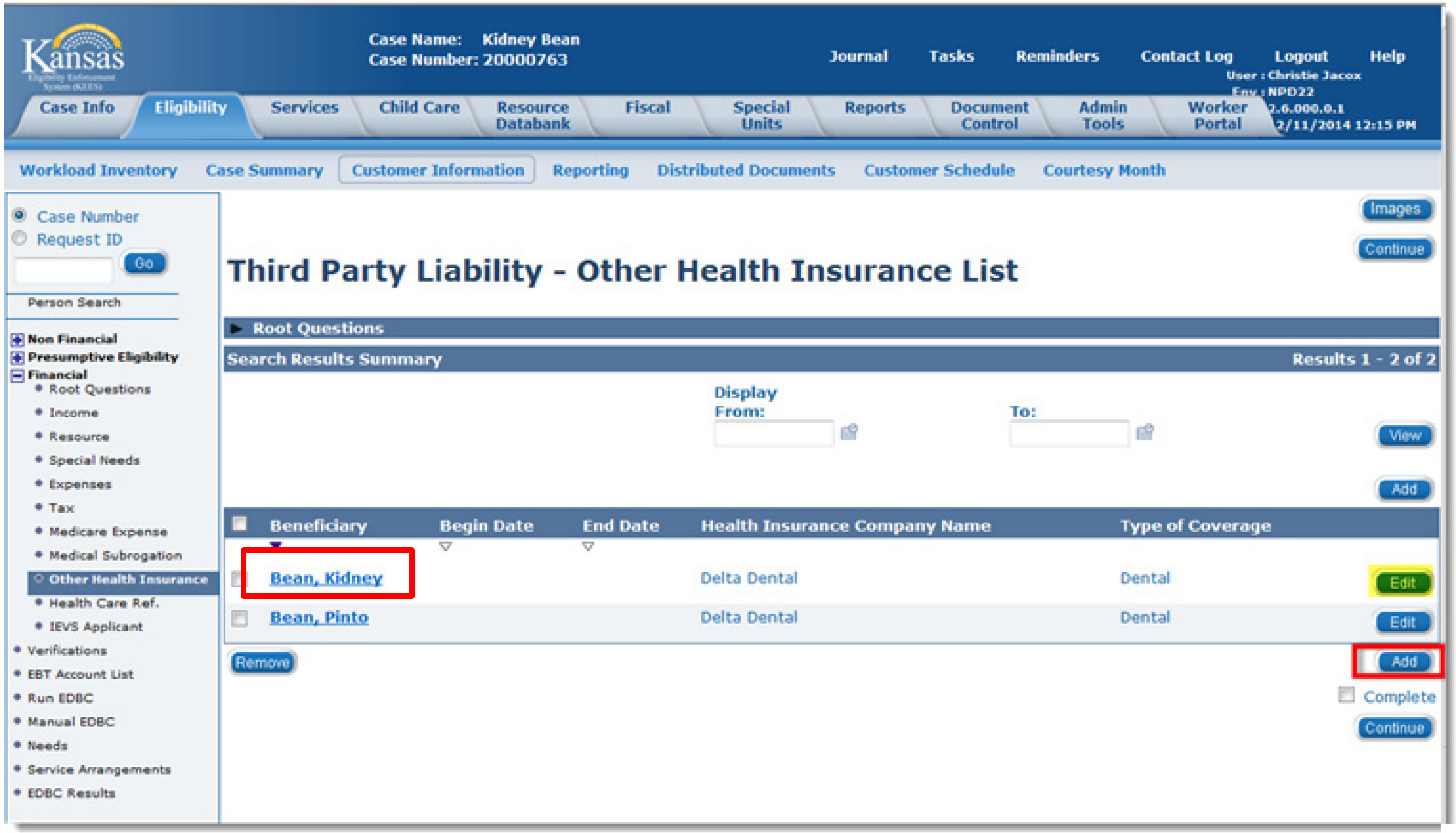
Lesson 1: Financial Page Navigation
Lesson 2: Income
Lesson 3: Resources
Lesson 4: Expenses
Lesson 5: Tax
Lesson 6: Medicare Expense
Lesson 7: Medical Subrogation
Lesson 8: Other Health Insurance

Lesson 8: Other Health Insurance > Introduction

The **Other Health Insurance** page is where information is captured for a consumer's third party private insurance.

Medical Eligibility: Data Collection - Financial Information

Lesson 8: Other Health Insurance > Third Party Liability – Other Health Insurance List



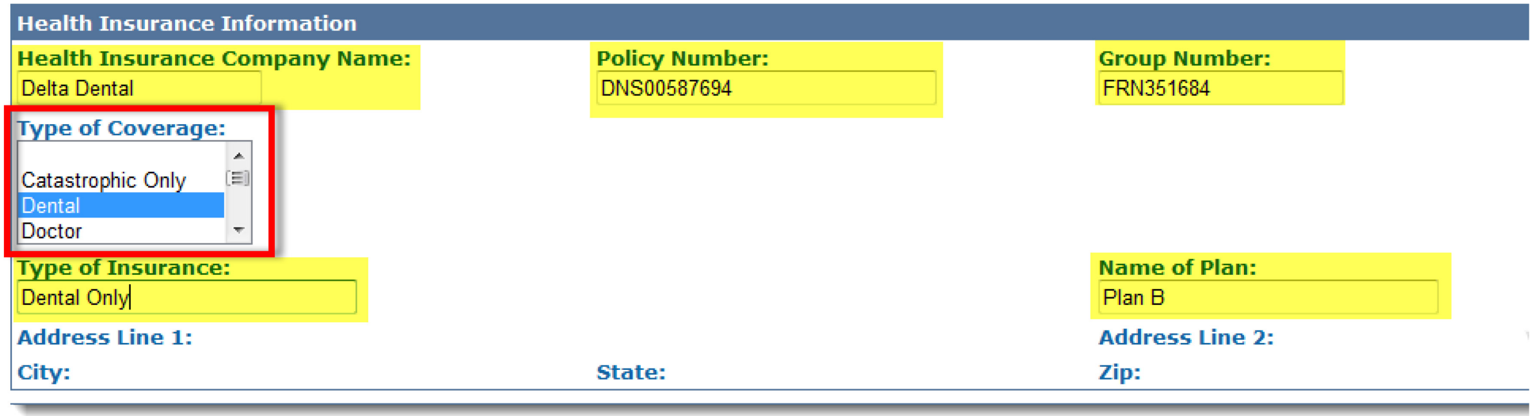
Once **Other Health Insurance** is selected on the Task Navigation, the **Third Party Liability – Other Health Insurance List** page appears. It is from this screen that TPL records can be viewed, edited, or added.

On the **TPL – Other Health Insurance Detail** (After Clicking **Add**):

- Select the **Beneficiary**. This is a multi-select field and will allow you to select all necessary persons.
- Select **Health Coverage Type** from the drop-down menu.
- Enter the **Start Date** and **End Date** (if applicable)

On the **TPL – Other Health Insurance Detail (Health Insurance Information):**

- Enter the **Health Insurance Company Name, Policy Number**, **Group Number, Type of Insurance,** and **Name of Plan**.
- Select all applicable **Type of Coverage(s)** from the multi-select menu.



Note: The information in this section can be found on the front and back of the consumer's insurance card.

Medical Eligibility: Data Collection - Financial Information

Lesson 8: Other Health Insurance > Third Party Liability – Other Health Insurance Detail

On the **TPL – Other Health Insurance Detail (Policy Holder Information):**

- Enter the **Policy Holder Name, Policy Holder's Social Security Number**, **Name of Employer,** and any additional know information.
- Select one of the individuals from the **Who is Covered** drop-down menu.

Note: If you multi-selected individuals under the **Beneficiary** menu it will consider them a covered individual

On the TPL – Other Health Insurance Detail (Access to Health Insurance):

- This section is used to capture information needed to determine CHIP eligibility.
- Answer each question, by selecting **Yes** or **No** from the drop-down menus

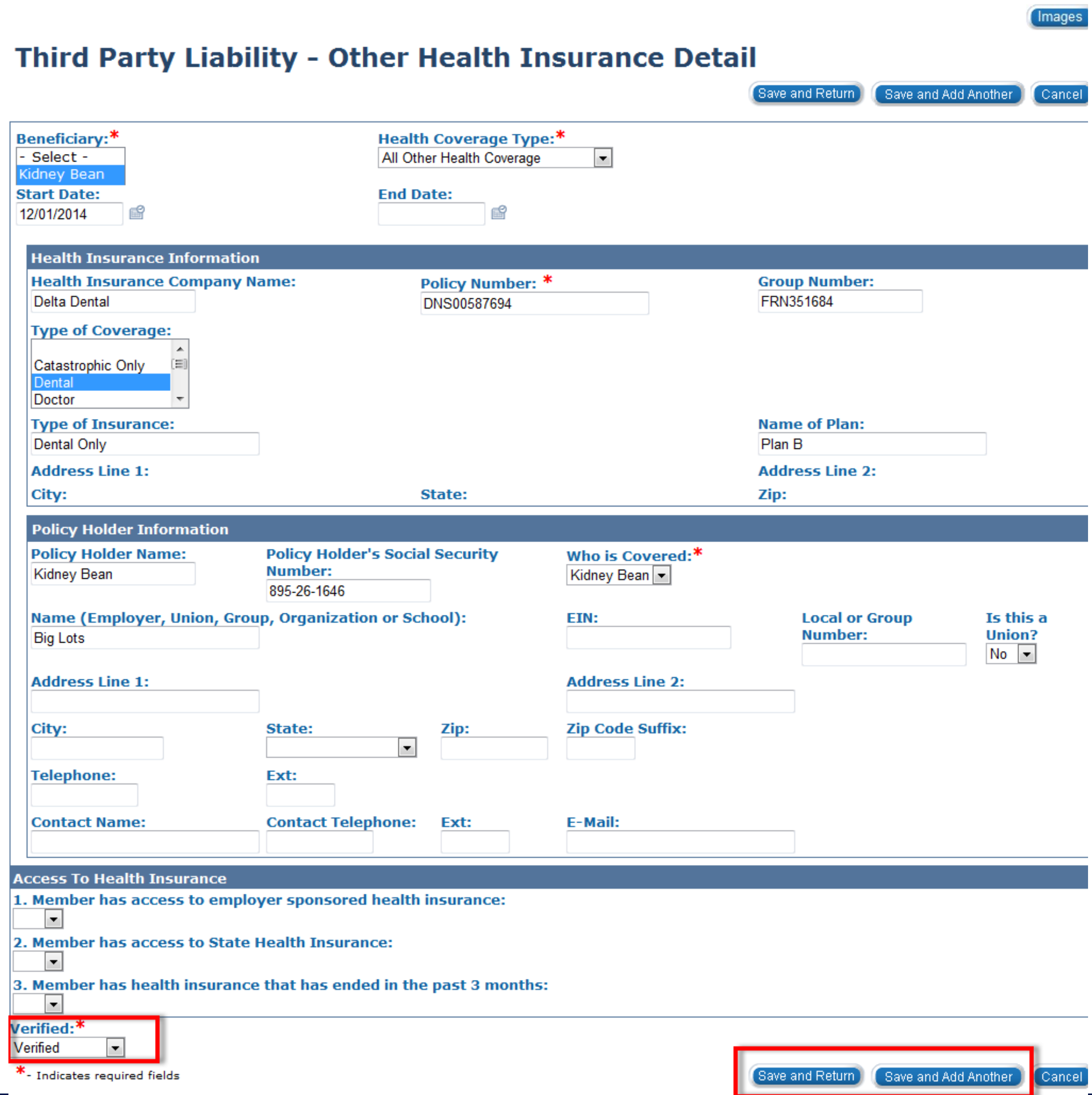
Medical Eligibility: Data Collection - Financial Information

Lesson 8: Other Health Insurance > Third Party Liability – Other Health Insurance Detail

Once all information is entered:

- Select a **Verified** Value from the drop-down list.
- Select **Save and Return.**

  If there are additional TPL records, click **Save and Add Another**



Remember, if you are entering Other Health Insurance, and a consumer has either a Medically Needy spenddown or a LTC liability; record the premium expense on the Expense Detail page.

If an Other Health Insurance ends, you must End Date the Other Health Insurance record and end date the premium expense from the Expense page.

In this lesson you learned:

- How to add other health insurance records

Medical Eligibility: Data Collection - Financial Information

Wrap up

This concludes the section on Data Collection for Financial Information in KEES.