Medical Eligibility

Registration

Medical Eligibility: Registration

Introduction

In this course you will learn about the File Clearance and Registration process.

After completing this course, you will be able to complete the following actions in KEES:

- Perform a Person Search

- File Clear Case Persons

- Register Applications

Agenda

- **Lesson 1: Performing a Person Search**
- Lesson 2: Completing File Clearance
- Lesson 3: Registration
- Lesson 4: e-Summary Registration (CH only)
- Lesson 5: Existing Case Registration

- The Person Search process is completed prior to File Clearance to help a user determine whether a person currently exists in KEES, and whether they already have a usable case number.

- It is important to complete a thorough search as to avoid creating duplicate persons or additional case numbers during the File Clearance and Registration process.

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Lesson 1: Performing a Person Search > Person Search results

No search results display if the consumer is not known to KEES. A user could click on **Refine Your Search** to add additional information for the search criteria such as DOB & SSN.

KEES will return every person whose Date of Birth matches according to the following:

- Month may be off by +1 or -1
  - Ex: 11/07/01 would return 10/07/01 and 12/07/01
- Day may be off by +1 or -1
  - Ex: 11/07/01 would return 11/06/01 and 11/08/01
- Year may be off by +1 or -1
  - Ex: 11/07/01 would return 11/07/00 and 11/07/02

KEES will return every person whose Social Security Number matches according to the following:

- SSN may be off by +1 or -1 in any <u>one</u> of the sections (first 3 numbers; middle 2 numbers; last 4 numbers)
  - SSN 123-45-6789 looking at the first 3 numbers only:
    - Could return 023, 223, 113, 133, 122, or 124

- The **Person Search** page utilizes wild card searches.

- Wild card searches can be performed on both the first name and last name of the consumer.

- This means that the user can enter only partial first and last names followed by an asterisk (*) to get a larger return on their search.

If the user was looking for Lilly Suspend they could enter Lil* Susp*. This would return any persons in KEES whose first three letters of their first name were 'Lil' and the first four letters of their last name were 'Susp'.

KEES will perform a comprehensive search and return any potential matches for the user to review. If a user is uncertain whether one of the potential matches that was returned is the person they were looking for, additional case specific information can be used to aid in the decision. By clicking the name hyperlink a user will be directed to the **Person View** page.

Person View

Person Detail Summary				
Name:	**SSN:**	**Date of Birth:**	**State Employee:**	
James Lemon	159789856	04/01/1955		
Alias Name(s):	**Alias SSN(s):**	**Gender:**		
		Male		
Home Address:	**Client ID:**			
7635 N MAIN STREET TOPEKA, KS 66601	0010011768			

Person Case History

Associated Individuals

Systems:	KE	CS	FA	KM	CN

TANF Months	GA Months	ABAWD Months		
0	0	0		

Program	Aid Code	LTC Details	Program Status	Case Number	Person Role	Role Start Date	Role End Date	Denial/Discont. Reason	Case Head	Companion Case (s)	Worker
Medical	MDN/DS/N/N		Active	20000101	MEM	07/01/2014			Yes	None	KH0206Q100
Medical	MDN/DS/N/N		Active	20000101	MEM	06/01/2014	06/30/2014		Yes	None	KH0206Q100
Medical			Denied	20000101	FRI	04/01/2014	05/31/2014	Doesn't Meet Program Req.	Yes	None	

The **Person View** page displays a holistic view of the individual and case related details. From here the user will be able to see all of the case numbers the person is associated to. The **Person View** page is very helpful when trying to determine whether a person has a usable case number.

PPS

The **Person View** page displays a holistic view of the individual and case related details. From here the user will be able to see all of the case numbers the person is associated to. The **Person View** page is very helpful when trying to determine whether a person has a usable case number

PPS

What is a usable case number?

- Usable case is one that has a foster care medical program with a medical aid code of FCM/DC/N/N/, FCM/JC/N/N, or FCM/TC/N/N/. DC= DCF; JC=KDOC-JS; TC=Tribal cases.
- Adoption Cases will have a medical aid code of ASM/C/N/N.

Person View screen showing Person Detail Summary and Person Case History

Program	Aid Code	LTC Details	Program Status	Case Number	Person Role	Role Start Date	Role End Date	Denial/Discont. Reason	Case Head	Companion Case(s)	Worker
Medical	MDN/DS/N/N		Active	20000101	MEM	07/01/2014			Yes	None	KH0206Q100
Medical	MDN/DS/N/N		Active	20000101	MEM	06/01/2014	06/30/2014		Yes	None	KH0206Q100
Medical			Denied	20000101	FRI	04/01/2014	05/31/2014	Doesn't Meet Program Req.	Yes	None	

- Under **Program** look for Medical or SSPP. If Medical is listed - look under **Aid Code**. If first 3 letters are FCM or ASM then it should NOT be used by any program other than Foster Care or Adoption Support medical.

- A user may need to look at several case numbers, as well as, the **Case Head** field to determine the best case number to use.

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In this lesson we have discussed the Person Search process using the wild card searches and how to identify a usable case number.

Now let's take a look at the File Clearance process.

Agenda

- Lesson 1: Performing a Person Search
- **Lesson 2: Completing File Clearance**
- Lesson 3: Registration
- Lesson 4: e-Summary Registration (CH only)
- Lesson 5: Existing Case Registration

What is File Clearance?

- File Clearance is the process of searching for a person to determine if they are currently known to KEES and whether they are associated to any existing case numbers.

- It also includes adding new persons to KEES and assigning a Client ID to them.

Since a Person Search has already been completed and the person was not found, the user should enter the person's full name, SSN, and DOB (or as much is known). Whoever is file cleared first will be the Case Head for this medical case.

If available, search for an EXACT match on SSN, DOB, and First Name.

- If this matches then this is considered an exact match for the person.

If available, search for an EXACT match on SSN (not considering any other search criteria) AND search for:

- First Name (with assumed 2 character wild card)
  - Ex: If name is James, the system will search for Ja*
- Last Name (with assumed 3 character wild card)
  - Ex: If name is Lemon, the system will search for Lem*

Lesson 2: Completing File Clearance > Search Results

- If the person already exists in KEES, use the radio button to identify the correct consumer and then click the **Select** button.

- If the person is not known to KEES, the user will click **Add New Person**.

If the person is known to KEES, then information (address, phone number & e-mail address) known to KEES will populate on the **Registration Person Detail** page. If a consumer is not known to KEES, the user will enter the information on the data collection pages after registration has been completed.

The **Alternative Client ID** is the consumer's client ID from KAECSES. It is only used if the consumer is not known to KEES .

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The business process for PPS medical applications is two steps:

- The Social Worker (DCF), Community Service Officer (Kansas Department of Corrections – Juvenile Services; KDOC-JS), or Social Worker – Tribal Agency submit an application – PPS 5410A Initial IV-E Eligibility Determination, notification of placement, and supporting eligibility documents.

- The eligibility specialist completes the PPS 5410B – Initial IV-E eligibility determination to determine whether the child is funding eligible for Foster Care. Similar forms are used for Adoption Assistance. This determination is not completed in KAECSES or KEES at this time.

- ES will register the case in KAECSES first and then register in KEES.

- The KAECSES Client ID will be entered as an alternative ID on the **Registration Person Detail** page during the KEES registration process.

In this lesson we learned about the file clearance process.

We have seen the differences in a person known to KEES and someone not known to KEES.

We have also discussed when to add the Alternate Client ID.

Now let's move on to Registration.

Agenda

- Lesson 1: Performing a Person Search
- Lesson 2: Completing File Clearance
- **Lesson 3: Registration**
- Lesson 4: e-Summary Registration (CH only)
- Lesson 5: Existing Case Registration

Registration is the process of adding persons from an application to the appropriate case. Case registration for KEES includes the following:

- Creating a case
- Adding case persons
- Creating a program
- Adding program persons
- Assigning a worker to the program

After a person has been searched for and chosen, the **Case Member List** page is displayed so that the user can create a new case. At this point, it is a 'shell' and the user will continue to add additional household members to the case until all have been added.

Once all members have been added, the **New Programs Detail** page displays prompting the user to select a person to be the Primary Applicant for the program and what program the consumer(s) is requesting. For PPS only- the child will always be chosen as the Primary Applicant.

The Add Program process repeats for each applicant requesting coverage. Each person that is added to the Medical program at this step, will share the same Medical program block. Therefore, if any applicant requires their own program block, do not add it here – it will need to be added in a later step.

Here the program (usually Medical) will need to be selected for the individual. Medical encompasses all of the different program types except for ADAP and SSPP.

Once the program has been checked, the user will click the **Select** button.

e-Applications

e-App Number	Applicant Name	Expedited Services	Recertification/Renewal	Application Date	e-App Status
1007504	Sunshine, Matthew	No	No	05/04/2015	In Progress

Display:

06/01/2015   [View]

Quarterly Reporting

Submit Months	Begin Month	End Month
January, April, July, October	05/2015	

▼ Presumptive Eligibility Adult - 6994

Worker:	Office Num 02 Unit Num Q1 User	Primary Applicant/Recipient:	Matthew Sunshine
Worker ID:	KH0206Q100	Language:	English
Program Status:	Pending	Phone Number:	(785)555-5555
		Application Date:	05/04/2015

Name	Role	Role Reason	Status	Status Reason	End Date
Mary Sunshine	MEM		Pending		
Matthew Sunshine	MEM		Pending		

[View Details]

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
Matthew Sunshine	01/03/1985	758-85-9494	0010005646	
Mary Sunshine	08/08/1985	123-45-7575	0010005647	
Annie Sunshine	05/05/2009	158-85-8585	0010005655	

After adding the consumers and programs the user is taken to the **Case Summary** Page where the user will see all the entered information.

At the bottom of the **Case Summary** page you will see a block called 'All People Associated with the Case'. This is where all of the Case Persons will be listed.

- A Case Person is a person who is part of the case, but may or may not be requesting aid for themselves.

- A Case Person can NEVER be removed from the case. They can have a Household Status of "Permanently Out of the Home" and can even be "hidden" so as not to appear on other pages throughout the system.

This is an example of the **Case Summary** page showing one medical program block.

What is a Program Block?

A program block shows the program details for each program on the case. Some of the details that will display in the program block are:

- The program persons (applicants and the case persons financially responsible for them).

- The type of medical coverage being requested.

- The status of the medical request.

- The worker or work team assigned to the program block.

KDHE managed medical programs and DCF managed medical programs can live together on the same case number, but are never combined on the same program block.

Once a KDHE medical program block or DCF medical program block becomes active, it remains a program block for that agency. This means that if it should become inactive at some point, it should not be used as a program block for the other agency.

PPS will have only one program block for FC/AS medical and will be on their own case number.

How to tell which agency "owns" the program block:

On the **Person View** page - under Worker - the first letter will be a "D" for DCF or "K" for KDHE. This same information can be located on the program block itself.

Long Term Care (LTC) and Home and Community Based Services (HCBS) recipients each get their own Medical program block, however they can share a case number with any other medical program other than PPS.

PPS will use the same program block for PPS, LTC and HCBS. They will just update the RMT as needed.

Lesson 3: Registration > Program Blocks

Husband and Wife both requesting a Medicare Savings Program	Husband requesting LTC and wife requesting a Medicare Savings Program
• Add both applicants at the same time to a Medical program block.	• Each applicant will get their own Medical program block. • Only one program can be added during the initial Registration process.

The key is in understanding which program types can share a program block, and which cannot.

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Family of four all requesting Family Medical

- Add all applicants at the same time to a Medical program block.

Same family of four but one child is requesting HCBS

- Family Medical applicants are added to the same Medical program block at the same time. Other child will need a separate Medical program block.

- Only one program can be added during the initial Registration process.

PPS- Administrative Role

- Child will always display as the Primary Applicant/Recipient.
- Begin Date for Medical will always default to the first day of the month. If the child is eligible one day in the month they are eligible for the entire month. **This date should never be changed.**
- A "Placement Provider" will always be assigned from the Resource Data Bank for Foster Care Medical cases. Exception is if child is in detention or PRTF.
- A "PPS Payee will always be assigned from the RDB for Adoption Medical cases.
- Begin Date for Placement Provider or PPS Payee is the actual date of placement with that provider.

PPS

Case Name: **Michelle Mitchell**
Case Number: **20000764**

Journal   **Tasks**   **Reminders**   **Contact Log**   **Logout Help**

User : Dana George

Case Info | **Eligibility** | **Services** | **Child Care** | **Resource Databank** | **Fiscal** | **Special Units** | **Reports** | **Document Control** | **Admin Tools** | **Worker Portal**

New Application   **Case Summary**   **Worker Assignment**   **Customer Schedule**   **e-Tools**

- ⦿ Case Number
- ○ Request ID
- **Go**

Person Search
- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case
- Access List

Medical Program Detail

* - Indicates required fields

View History   **TMC**   **Save and Return**   **Cancel**

Date:*
01/01/2015   **View**

Program Information

Status:* | **Status Reason:** | **Household Premium Amount:**
Active | | 0.00

Application Date:* | **Review Begin Month:** | **Review Due Month:*** | **Delinquent Premiums:** | **Date:**
11/05/2014 **Edit** | 11/2014 | 10/2015 | |

Automatically Reassign When Activated: | **Assign To Medical Only:** | **Delinquent Premium Amount:**
No ▾ | No ▾ |

Administrative Roles

Name	Administrative Role	Begin Date	End Date	
Michelle L Mitchell	Primary Applicant/Recipient	11/01/2014		Edit
CINDY THOMAS	Placement Provider	11/05/2014		Edit
				Add

Program Persons

Name	CE	Requested Medicaid Type	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason	
Michelle L Mitchell		PPS	Primary Applicant	MEM		Active		Edit

The **Pending Assignment List** page is used to assign a worker or work team to the newly created Medical program. The user can choose to either assign the program manually, or allow KEES to assign it automatically using behind-the-scenes logic.

To manually assign a program, the user will select the program they wish to assign, and then select the radio button to the left of Manual Assignment. Clicking on the **Select** button will take the user to the **Select Worker** page.

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Lesson 3: Registration > Select Worker

- The user will enter the Worker ID from the Worker ID list or, for PPS cases, the user will enter their own Worker ID or their name to assign the case to themselves.

- If automatic assignment is chosen, KEES applies behind-the-scenes logic to assign the program to the appropriate worker.

- If the auto assignment logic is unable to find a worker or work team that meets all of the auto assignment criteria, the user will need to manually assign the program.

- If this happens, no error message will display, the user simply stays on this page.

PPS

- PPS Staff have individual caseloads.

- Cases will be <u>manually</u> assigned to individual workers.

- Always check "no' for automatically reassign when activated

The **Case Summary** page allows the user to view all of the information that was just entered when creating the case. At this point, the case creation process is complete but there are a few final steps that need taken to finish the registration process.

Lesson 3: Registration > Additional steps

- Update RMT as needed
- Add additional program blocks as needed
- Update the primary applicant as needed
- Update the contact information as needed
- Update the household status (per your agency's policy)
- Verify the task priority set correctly (Clearinghouse only)

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Lesson 3: Registration > Update RMT

The Requested Medical Type (RMT) is a data element associated to a person's application which will restrict the rules' medical hierarchy.

This is used to apply for only a specific type of medical benefit (such as: MAGI, LTC, MSP, PPS, etc.)

It is important that the RMT be set correctly for each applicant.

- **REQUESTED MEDICAL TYPES:**

- **Inmate**- Used when Inmate medical is requested
- **LTC**- Used when an applicant requests LTC/HCBS only
- **MAGI**- Used for all other Clearinghouse requests
- **MSP**- Used when an applicant requests a Medicare Savings Program only
- **Medica**l- Used for all other DCF requests
- **PPS**- Used for FC/AA medical requests
- **Qualified Disabled Working Individual-** Used for QWD requests
- **Resource Assessment Only-** Used for Resource Assessment Only requests
- **Working Healthy-** Used for Working Healthy requests

Once we have updated any necessary Requested Medical Types we will look at updating contact information.

- If any of the Case Persons were previously known to KEES, they may have had a change in contact information.

- It is easiest to update this information from within the context of the case (rather than during the Registration flow).

- Contact information (specifically address) is updated through the Contact Summary page.

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Lesson 3: Registration > Contact Summary

The user can add a new address for any or all Case Persons from the **Contact Summary** page.

PPS- Enter the Contract Manager's office as the mailing and physical address for the child, not the actual placement address. This is to ensure confidentiality of the foster home placement.

If two separate Medical program blocks were needed now would be the time to go back and add that other program block.

The process to add an additional program block is very similar to the process used to create the initial one.

- Add the program
- Select the Primary Applicant
- Add the RMT
- Assign a worker

.

If you are at the KanCare Clearinghouse, you will need this one last step.

Because we want to ensure that the downstream workflow maintains the appropriate priority (ex: Expedited), it is important to double check it before completing your task.

In this lesson we covered:

- How to create a new case in KEES
- How to add a program
- What a program block is
- Who can share a program block
- How to assign a worker
- Updating Requested Medical Types
- Updating Contact Information
- Adding additional program blocks
- Updating task status (CH only)

Medical Eligibility: Registration

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- Lesson 1: Performing a Person Search
- Lesson 2: Completing File Clearance
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- **Lesson 4: e-Summary Registration (CH only)**
- Lesson 5: Existing Case Registration

The e-Summary Registration process is very similar to the Manual Registration process, with the biggest difference being that many of the steps can be skipped by the user as KEES will perform them automatically.

A user will select the **e-App Status** and **Type**. To make the search easier, the user may also want to choose a date range. Any e-Application falling within those criteria will be displayed. The user would then click the **e-Application Number** of the chosen case.

To begin the e-Application Registration process, the user will click the **Link e-App to Case** button in the upper-right corner.

Lesson 4: e-Summary Registration > Registration Person Search Results

The user is brought directly to the **Registration Person Search Results** page. The information has been pulled in from the e-App Summary automatically. Since the person was not known to **KEES**, the user will click the **Add New Person** button. Had the person been known to **KEES**, the user would click the radio button to the left of the person's name and click **Select**.

This brings the user to the **Registration Person Detail** page, and just like in the Manual Registration Process, the user would enter the person's Alternative Client ID if they were only known to KAECSES. Then the user will click the **Save and Continue** button.

KEES will continue to give the **Add Person** option until all Case Persons have been file cleared.

Once all Case Persons have been file cleared, the **Save and Continue** button will display.

The **Pending Assignment List** page works the same as in the Manual Registration Process – the user can either choose **Automatic Assignment** or **Manua**l **Assignment**.

Basic automatic worker assignment logic:

- If Outstationed Worker assistance was indicated, assign to the Outstationed Worker ID.

- If ALL persons on the program block requested Long Term Care (LTC), assign to DCF.

- If ALL persons on the program block requested Medicare Savings Program (MSP), or are age 65 or older and not pregnant, or are a Medicare recipient and not pregnant, assign to DCF.

- All other requests are assigned to the Clearinghouse.

Once worker assignment is complete, the user is returned to the **e-Application Summary** page. The information has now been linked to a case number. Clicking on the case number hyperlink will take the user to the **Case Summary** page.

Now that the e-Summary Registration process is complete, we need to verify that everything was set up correctly.

The Worker Portal only allows for the data entry of up to eight persons. If more than eight persons were listed on the application, the worker will need to manually file clear them and register them to the newly created case number.

You may have also noticed that one of the biggest differences between the manual registration process and the e-Application Summary process is that **KEES** automatically selected the:

- Program
- Program Persons
- Requested Medical Type
- The worker (Clearinghouse/DCF)

Lesson 4: e-Summary Registration > Check Program Block

Check the **Case Summary** page to verify if any of the Program Persons need to be added or removed from the program block due to their RMT.

Remember

•KDHE managed medical programs and DCF managed medical programs can never be combined on the same program block.

•LTC/HCBS applicants must always get their own Medical Program block.

If there is more than one consumer on the application, the user will need to consider how many program blocks are needed.

- MAGI, MAGI = 1 program block
- MAGI, MEDICAL = 2 program blocks
- MAGI, LTC = 2 program blocks
- MAGI, MSP = 2 program blocks
- MAGI, LTC, MSP = 3 program blocks
- LTC, LTC = 2 program blocks
- LTC, MSP = 2 program blocks
- MSP, MSP = 1 program block

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- Lesson 1: Performing a Person Search
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- **Lesson 5: Existing Case Registration**

In this lesson we will look at what steps are needed for existing case registration.

The most important thing to remember about existing case registration is that a user must find a usable case number.

Are all persons listed on the application also listed under the "All People Associated with the Case" block?

➢ If any persons need to be added to the case, complete the Add A Case Person Process.

On the **Case Summary** page select **New Person** in the Task Navigation to access the **Registration Person Search** page.

Lesson 5: Existing Case Registration > Add Case Persons

The **Case Member List** page displays. To repeat the File Clearance process for another new Case Person, click **Add Person**. If no other Case Persons are needed, click the **Save and Continue** button.

After the **Save and Continue** button is selected the **Case** page displays with the new person added to the case.

Can any of the applicants be added to any of the program blocks? If yes, complete one of the following:

➤ Rescind Program Person
➤ Reapply Program Person
➤ Add Program Person

If no, the user would add a new program block

The **Medical Program Detail** page is where to find the reapply and rescind buttons.

Lesson 5: Existing Case Registration > Add Program Person

The **Case Summary** page displays showing the applicant is in pending status with the new application date.

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Are there any applicants left that have not been addressed? If yes, complete one of the following:

- Reapply Program (if there is a usable inactive program block available)
- Add New Program (if there is no usable inactive program block)

If needed, a worker would then complete the steps below:

- Update or add RMT
- Update or add administrative role
- Update the worker
- Update contact information
- Complete the e-linking process
- Update the priority of the task

Lesson 5: Existing Case Registration > Summary

This lesson has covered many different processes:

1. Add Case Person
2. Rescind/Reapply
3. Add Program Person
4. Add New Program
5. Update Contact Information (DCF only)
6. Update RMT
7. Add/Update Admin. Roles
8. Update Household Status
9. Reassign Work

Wrap up

That concludes the training. In this course, we reviewed the steps needed to complete the following processes in KEES:

- Person Search
- File Clearance
- Case Registration