

Ashley Carson Cottingham

**Authorized signature**

**Number:** APD-AR-15-006

**Issue date:** 2/4/2015

**Topic:** Medical benefits

**Due date:**

**Subject:** MAGI CONVERSION PROJECT

**Applies to (check all that apply):**

- |  |  |
|--|--|
| <input type="checkbox"/> All DHS employees                             | <input type="checkbox"/> County Mental Health Directors                      |
| <input checked="" type="checkbox"/> Area Agencies on Aging             | <input type="checkbox"/> Health Services                                     |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services(ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs                     | <input type="checkbox"/> ODDS Children's Intensive In Home Services          |
| <input type="checkbox"/> County DD Program Managers                    | <input type="checkbox"/> Stabilization and Crisis Unit (SACU)                |
| <input type="checkbox"/> ODDS Children's Residential Services          | <input type="checkbox"/> Other ( <i>please specify</i> ):                    |
| <input type="checkbox"/> Child Welfare Programs                        |  |

**Action required: Determine OSIPM or MSP eligibility for MAGI with Medicare recipients**

**Reason for action:**

Since the Affordable Care Act began in January of 2014, the Buy-in unit has been forwarding Medicare recipient information to 5503, for individuals who are currently receiving MAGI Medicaid. Unfortunately, most of these cases have not been looked at for dual eligibility or MSP eligibility.

Most individuals who are receiving MAGI Medicaid do not continue to be eligible for MAGI once they begin to receive Medicare. The exceptions are females who are pregnant, or individuals who are care taker relatives of dependent children. These individuals may receive both Medicare and the MAGI Pregnant Woman program, or the MAGI Parent and other Caretaker Relative programs.

Currently there are approximately 5,800 MAGI individuals who are also receiving Medicare. These individuals must have eligibility for MSP and/or OSIPM determined. If the individual is determined MSP eligible, dual eligibility for one of the MAGI programs that can coexist with MSP must be looked at.

The following is the process AAA/APD and 5503 will use to determine correct program eligibility for these 5,800 individuals. Please note: this process is different than our current process outlined in the procedure document. **This** is the only process that should be used for this project.

Sytems has generated a list of individuals who are receiving MAGI and are either currently Medicare eligible or will be Medicare eligible soon. These individuals will be screened by address to identify their local APD/AAA office. Local offices will be sent a spreadsheet of the identified individuals. Please review the list to determine the person is either currently Medicare eligible with an open MAGI case, or the person will be Medicare eligible within the next 30 days. If the Medicare is more than 30 days from the begin date, please mark that on the spreadsheet, and do not take further action at this time. If the person is either currently Medicare and MAGI or will be within 30 days, please contact the individual to determine MSP/OSIPM eligibility. Local offices will be asked to track these individuals for 90 days and return the completed spreadsheet at the end of the 90 day period. If the individual has a current SNAP case in your office, but has moved please complete the MSP/OSIPM determination and then transfer the case to the appropriate branch. If the person does not have a SNAP case in your office and should be served by a different office, please contact the appropriate office for processing. If you will be transferring a case to another office, please cc: [APDleads.5503@state.or.us](mailto:APDleads.5503@state.or.us) on the email. The information is needed for tracking. Put MAGI CONVERSION PROJECT in subject line of the email.

**Please follow the below procedure for this project**

- Contact individuals on the spreadsheet. Local offices can decide how they want to contact these individuals. Complete MSP eligibility determination for each person on your branch list, if able. This includes getting a completed 539A. Please ask each individual whether they are pregnant or a caretaker relative of a dependent child. 5503 will need this information for their eligibility process.

**For individuals who indicate they are NOT pregnant or a care taker relative of a dependent child**

**For individuals determined eligible for MSP:**

- Send an email to: [5503.APDreferrals@state.or.us](mailto:5503.APDreferrals@state.or.us) .
  - ✓ The subject line of the email will state: MAGI CONVERSION PROJECT.
  - ✓ In the body of the email the worker will state: Client name, SSN, DOB and the MSP program the client is eligible for. Note the client has marked they

are **NOT** pregnant or a care taker relative.

- ✓ 5503 will send a closure and reduction notice for MAGI and local branch office will be notified of effective date for MAGI closure. Please do not open an MSP program until MAGI has been closed.

### **For individuals determined NOT eligible for MSP**

- Send an email to: [5503.APDreferrals@state.or.us](mailto:5503.APDreferrals@state.or.us)
  - ✓ The subject line of the email will state: MAGI CONVERSION PROJECT.
  - ✓ In the body of the email the worker will state: Client name, SSN and DOB. Explain the individual has been determined NOT eligible for any MSP program and action should be taken on the MAGI case.
  - ✓ Local APD/AAA office will send denial for APD/AAA program. 5503 will send closure notice for MAGI.

### **If the individual has indicated they ARE pregnant or a caretaker relative**

### **For individuals determined eligible for MSP:**

- Send an email to: [5503.APDreferrals@state.or.us](mailto:5503.APDreferrals@state.or.us)
  - ✓ The subject line of the email will state: MAGI CONVERSION PROJECT
  - ✓ In the body of the email the worker will state: Client name, SSN and DOB. Explain the person has been determined to be MSP eligible and has stated they are either pregnant or a caretaker relative. Local office will provide the MSP and Medicare coding.
  - ✓ 5503 will determine dual eligibility. If the client is NOT eligible for a MAGI/Medicare program, 5503 will contact the local APD/AAA with the MAGI end date. 5503 will send closure and reduction for the MAGI program and notify the local office of end date. Please do not open MSP program until MAGI has been closed. If the person is eligible for a dual MAGI/MSP program 5503 will add the MSP and Medicare coding and keep the case.

### **For individuals determined NOT eligible for MSP:**

- Send an email to: [5503.APDreferrals@state.or.us](mailto:5503.APDreferrals@state.or.us)
  - ✓ The subject line of the email will state: MAGI CONVERSION PROJECT
  - ✓ In the body of the email the worker will state: Client name, SSN and DOB. Explain the person is not eligible for an MSP program, but does have Medicare and has marked they are a pregnant female or care

taker relative. Give them the correct MIB coding, FS2 and SBI coding to add to their case.

- ✓ Local APD/AAA office will send denial for APD/AAA program.
- ✓ 5503 will either send closure notice for MAGI or if client is determined eligible for a MAGI program that co-exists with Medicare, will code the case appropriately.

### **If during MSP determination it is discovered the individual is OSIPM eligible**

- Send an email to: [APDleads.5503@state.or.us](mailto:APDleads.5503@state.or.us)
  - ✓ The subject line of the email will state: MAGI CONVERSION PROJECT
  - ✓ In the body of the email the worker will state: Client name, SSN and DOB. Explain the client is OSIPM eligible.
  - ✓ The APD leads will coordinate program conversion.

### **Tracking eligibility determinations**

Local offices should be tracking the eligibility determinations on the spreadsheet that was provided to them. Needed information is listed on the spreadsheet. At 90 days from receiving the spreadsheet, the local office will forward the spreadsheet to [APDleads.5503@state.or.us](mailto:APDleads.5503@state.or.us).

- For the following situations:
  - ✓ Individuals who have not made contact with the branch should be marked as 'No Contact' on the spreadsheet.
  - ✓ If the individual has indicated they do not want to apply for an MSP program, please mark the 'Uninterested' box. These groups of individuals will be sent to 5503 for further action.
  - ✓ If you find an individual has an existing MSP program, please mark the 'Current' box.
  - ✓ If the individual has a Medicare future effective date, mark the Medicare effective date in the 'Medicare future effective date' box.

In addition to the above process, there will be updates to the MMIS system to identify individuals who are currently receiving Medicaid and who become eligible for Medicare. These individuals will be sent an auto generated notice from MMIS 45 days prior to Medicare beginning. ([See copy of notice](#)).The notice will tell them to expect

contact from the local APD/AAA office.

The buy in unit will be providing monthly information to [APDleads.5503@state.or.us](mailto:APDleads.5503@state.or.us) regarding MAGI individuals who will be becoming Medicare eligible. Approximately 45 days prior to their Medicare begin date, local offices will be sent a spreadsheet similar to the one used for the MAGI CONVERSION PROJECT. Local offices will be asked to contact the individual and process an MSP determination. Local offices will follow the outline delineated above with the exception of: if an MSP determination is made prior to the 15<sup>th</sup> of the month, the local office will add the MSP begin date to the email sent to [5503.APDreferrals@state.or.us](mailto:5503.APDreferrals@state.or.us). This will allow 5503 time to send a reduction notice and close the current MAGI case prior to the MSP begin date.

At 90 days from receipt of the monthly spreadsheet, local office will return the completed spreadsheet to: [APDleads.5503@state.or.us](mailto:APDleads.5503@state.or.us) . The ACA procedure document will be updated with this information shortly.

**Field/stakeholder review:**     Yes     No

**If yes, reviewed by:** Policy, OPS, 5503/APD Unit

*If you have any questions about this action request, contact:*

<b>Contact(s):</b>	Lauren Mitchell		
<b>Phone:</b>	503-945-6479	<b>Fax:</b>	503-373-7700
<b>Email:</b>	<a href="mailto:Lauren.e.mitchell@state.or.us">Lauren.e.mitchell@state.or.us</a>		