

Aging and People with Disabilities

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Number: APD-IM-14-023

Issue date: 4/29/2014

Topic: Medical Benefits

Subject: Referral process for MAGI Medical and tax credit through Cover Oregon

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 |
| <input type="checkbox"/> Children, Adults and Families | Disabilities Services (ODDS) |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Other (<i>please specify</i>): |

Message:

Note: 5503 has provided us with two new options to use for case changes. Please no longer use the ACA.Issues mailbox.

- To update Name, DOB, SSN, gender or pregnancy on a MAGI case use: OHA.issues@state.or.us
- For urgent issues use: urgent.requests5503@state.or.us
- For an applicant with a life threatening condition. Obtain a completed and signed 7210 (if the client is not receiving SSI), scan and send to Lauren.e.mitchell@state.or.us with an explanation of the emergency in the body of the email. These cases will be sent for an expedited MAGI determination. Please enter #secure# on the email subject line.

APD is updating some of the procedures outlined in APD-IM-13-089. This topic is a very dynamic one and be aware there will be more changes going into the future. We don't know exactly what they will be, but we are sure they will happen. We will do our best to update this information as we become aware of the necessity to do so. Please follow the procedures outlined below, effective immediately.

APD/AAA does not determine eligibility for MAGI programs. We do not have the required tax status information on our application and have not been trained to

determine eligibility for these programs. As such, in most cases (the exception being SSI clients), clients will be referred to Cover Oregon for a MAGI determination. Cover Oregon or 5503 is responsible for sending any approval or denial letters for their programs, referring for tax credit if applicable, and processing any hearing requests on MAGI case determinations.

APD/AAA referral process.

1. **New applicant** – no services- who is 65 or older OR who is receiving Medicare AND is not receiving SSI:
 - Provide client with date stamped 7210 application form. Instruct the client to complete the application, sign it, and return it to Cover Oregon for processing. The Cover Oregon address is on the 7210 form.
 - Have client complete and sign 539A.
 - If client is eligible for APD programs, open case using Oregon ACCESS integration.
 - If client is not eligible for APD programs, send a partial denial for APD programs only. Use this language on the 540:
 - Your application for the Oregon Supplemental Income Program Medical (OSIPM)/Medicare Savings Programs (QMB/SMB/SMF) is denied effective [mm/dd/yy] because [insert specific reason]. You do not qualify for any medical assistance programs administered by Aging and People with Disabilities (APD). To be eligible for Oregon Supplemental Income Program Medical (OSIPM), you must be age 65 or older, blind, or have a disability that meets Social Security standards AND have assumed or protected eligibility or be within the income and resource limits. In order to qualify for the Medicare Savings Programs (QMB, SMB, SMF), you must have Medicare Part A and have income and resources within the allowable program limits. You must also meet all other non-financial eligibility requirements and complete the application and verification process to qualify for APD medical programs. You will receive a separate notice regarding your eligibility for all other medical programs offered by the state.
OAR 410-120-1210; Chapter 461: in Division 115, Rules 0010, 0020, 0230, 0610, 0700; in Division 120, Rules 0010, 0315, 0330, 0345, 0510; in Division 125, Rules 0310, 0330, 0350, 0370; in Division 135, Rules 0010, 0726, 0730, 0745, 0750, 0771, 0780, 0790, 0800, 0811, 0820, 0825, 0830; in Division 155, Rules 0250, 0290, and 0295; in Division 160, Rule 0015.

2. **New Applicant** –no services- who is under 65 AND not receiving Medicare or SSI:
 - If you have a signed 7210
 - Date stamp the 7210 on the top of the second page [[see SS-IM-14-010](#)] and forward to Cover Oregon for processing.
 - If you have a signed 539A
 - Provide client with date stamped 7210 application form. Staple the 539A to the back of the 7210. Instruct the client to complete the application, sign it, and return both applications to Cover Oregon for processing. The Cover Oregon address is on the 7210 form.
 - 5503/Cover Oregon will send approval/denial notices for their programs.
3. **New Applicant** indicates they have applied with Cover Oregon or at 5503 and is requesting case status information
 - Refer applicant to 5503/Cover Oregon for all inquiries including; case status, request for hearings and demographic changes. Toll free number is 1-855-268-3767. If offices have a phone line available for clients to use, please provide that assistance.
4. **New Applicant** is requesting services

Perform the service assessment and determine if the client would be NF, State Plan K, or SPPC service eligible.

- **If the client is not service eligible**, follow the appropriate procedure among 1, 2 or 3 above.
 - If the client has a life threatening condition, have the client complete and sign the 7210. Scan and email to Lauren.e.mitchell@state.or.us with the emergent situation explained in the body of the email. Please enter #secure# on the email subject line. These cases will be sent for an expedited MAGI determination.
- **If the client is service eligible**, examine the Medicaid eligibility, as follows:
 - **If applicant has contacted the hospital**, the hospital may do a Hospital Presumptive determination for MAGI. If a person has been determined eligible for Hospital Presumptive MAGI (excluding CHIP), they are eligible for NF, State Plan K and SPPC services. Follow instructions on number 8 of this document to add service coding to a MAGI case.

- **If applicant has not contacted the hospital:**
 - Provide client with date stamped 7210 application form. Instruct the client to complete the application, sign it, and return it to Cover Oregon for processing. The Cover Oregon address is on the 7210 form.
- **Concurrently, obtain a signed 539A and evaluate for OSIPM eligibility.**
 - If client has SSA disability determination, and meets all other OSIPM eligibility criteria, open OSIPM case.
 - If the client meets criteria for PMDDT field approval using current protocols, and meets all other OSIPM eligibility criteria, open OSIPM.
 - If field staff have questions about PMDDT field approvals, call 1-866-535-8431 for assistance.
 - The OSIPM will remain open until the MAGI determination is made.
 - If MAGI eligibility is established narrate in OACCESS the client has been determined MAGI eligible and leave the OSIPM coding on the case.
 - If MAGI is denied, the OSIPM case will remain in effect. Submit documentation to PMDDT if a full PMDDT determination is required.
 - If the client cannot be found OSIPM eligible, we will have to await a MAGI determination.
- 5503/Cover Oregon will send approval/denial notices for their programs.

5. **Existing APD/AAA client** loses eligibility for OSIPM or MSP

- **LEAVE THE EXISTING CASE OPEN.**
 - If the case you are leaving open is OSIPM NF/K Plan services and the client meets SPL, leave NF/K plan services open.
 - If the case you are leaving open is OSIPM NF/K Plan services and the client no longer meets SPL, review for SPPC.
 - If eligible for SPPC, open SPPC services and send notice to reduce from LTC to SPPC.
 - If not eligible for SPPC either, send closure notice for LTC service portion of benefit.
 - If the client would be over income without services, reduce income to zero to prevent case from going NA.
 - If the case you are leaving open is OSIPM SPPC and the client meets SPPC criteria, leave SPPC services open.

- If the case you are leaving open is MSP. Leave the case as is. Do not remove the Medicare coding.
- Provide client with a date stamped 7210, with instructions to complete, sign and return to Cover Oregon.
 - Review MMIS periodically to see if MAGI case has been opened.
 - If MAGI is approved:
 - If the case remaining open with APD/AAA is MSP, transfer the case to 5503.
 - If the case remaining open with APD/AAA is OSIPM:
 - If there are no APD services in place, transfer the OSIPM case to 5503.
 - If there are APD services in place, retain the case and follow instructions under number 8 of this document.
 - If MAGI has been denied, send 540 and close OSIPM/MSP and any services.
 - 5503/Cover Oregon will send approval/denial notices for their programs.

NOTE: APD Worker [Guide G. 9](#), Decision Notice Preparation Tips is being updated and changes will be posted as soon as possible.

6. **Existing non service APD/AAA client** has submitted 7210 to Cover Oregon
 - Review MMIS periodically to see if MAGI case has been opened.
 - If client is found eligible for MAGI, transfer CM case to 5503.
 - If client is found ineligible for MAGI, retain APD case.

7. **Existing MAGI client** begins receiving Medicare (this process has changed since the document 'MAGI client who becomes Medicare eligible', was posted on the ACA information webpage).
 - Buy In unit will notify 5503 that the client is receiving Medicare.
 - 5503 will evaluate for MAGI medical programs under which a client can receive Medicare (e.g. Parent and Caretaker Relative and Pregnant Woman)
 - If 5503 determines the client is not eligible for a MAGI medical program that can co-exist with MSP, 5503 will refer to the local office for an MSP determination using the case transfer mailbox.
 - If the APD/AAA office finds the client eligible for MSP, the office should notify 5503 of the determination and request the MAGI be closed so we can open the MSP. Use form MEDC to

notify 5503 of the change in circumstance.

(See [SS-IM-13-035](#)).

- If the APD office finds the client is ineligible for MSP, the office should notify 5503 of the MSP determination using the MEDC (see [SS-IM-13-035](#)).
- If 5503 determines the client is eligible for a MAGI medical program that can co-exist with MSP, they will keep the case and add the MSP eligibility.

8. **Existing MAGI client** is referred for Service Assessment and is eligible for NF, K Plan or SPPC services.

- Obtain a signed 539A. These clients will be subject to estate recovery and the 7210 does not provide that information. Additionally, please exhaust any available post hospital extended care benefit before authorizing a LTC NF placement.
- MAGI eligibility exists in MMIS Only – there is no CM case:
 - At this time there is not a way to code an MMIS only MAGI case so that providers can get paid. As a work around, you will need to set up a D4 case.
 - You will be setting up a D4 case in Oregon Access if this is a NF, K plan or SPPC client. If this is an MMIS only case, you can override MAGI by creating a “D4 work around case”.
 - The “D4 work around case” in Oregon ACCESS should have the following characteristics:
 - Program Code = D4
 - Med/Pgm # =OSP 01
 - Case Status date = First date on which you plan to authorize services
 - Need/Resource
 - SIP 0.00 only. Do not code actual income.
 - In the benefit number field with the SIP entry, please type MAGI SVC.
 - If you have already approved your CAPS benefit, you may add the service related need codes.
 - Case Descriptor:
 - If you have not yet approved your CAPS benefit, begin with NSS NCP.
 - If you have approved your CAPS benefit, NCP with the appropriate service related case descriptors
 - Integrate the CM record to the mainframe. Send it to MMIS in real time by pressing F9 on the SCMS screen.
 - Approve CAPS benefit if you have not already done so.

- You may need to modify the CM case descriptors the next day to include the service related case descriptors.
 - The next day, after batch processing, both MMIS and CM should be updated. You should be able to authorize and pay for services.
- If there is an existing CMS case at 5503, please contact Lauren.e.mitchell@state.or.us and provide information on the case and branch you need it transferred to. Please enter #secure# on the email subject line.
 - Once the case has been transferred to your branch, follow the coding instructions above, using the transferred case to build your “D4 work around case”.
- The D4 case will override the MAGI eligibility segment in MMIS and will allow us to authorize and pay for NF, K Plan, and SPPC services.
- If the client loses service eligibility, send MEDC to 5503 explaining that MAGI case should be restored. Transfer ‘D4 work around case’ to 5503.

NOTE: The coding instructions above are provided as a general template. Depending upon the characteristics of your case, what type of service you are trying to authorize, etc... you may find that you need to add additional codes as directed by system edits. If you have problems coding the “D4 work around case”, please contact the service desk at 503-945-5623.

9. **Existing MAGI client** begins receiving SSI

- Send a MEDC form to 5503 (see [SS-IM-13-035](#)).
- Indicate the client has become eligible for OSIPM.
- If there is an existing CMS case at 5503, please contact Lauren.e.mitchell@state.or.us and provide information on the case and branch you need it transferred to. You can then set up an OSIPM case using the same case number.
- If there is only an MMIS MAGI case, over ride the MAGI by setting up a D4 case in ACCESS and integrating the CM record to the mainframe. Send to MMIS in real time by pressing F9 on the SCMS screen.

If you have any questions about this information, contact:

Contact(s):	Field services/procedure questions: Angela Munkers Policy question: Lauren Mitchell or Katherine Bodi		
Phone:	Angela: 503-945-6209 Lauren: 503-945-6479 Katherine: 503-945-6455	Fax:	
Email:	Angela.p.munkers@state.or.us Lauren.e.mitchell@state.or.us Katherine.m.bodi@state.or.us		