

**Aging and People with Disabilities**

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**Number: APD-IM-14-028**

**Issue date: 6/18/2014**

**Topic:** Medical Benefits

**Subject:** Change in APD/AAA referral process to 5503

**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:**

This transmittal updates some of the procedures outlined in APD-IM-14-023.

Per OAR 461-180-0085, APD has been unable to close any Medicaid case without a review for MAGI eligibility. Without a communication process in place, this has led to many cases being kept open without resolution. APD in conjunction with Oregon Health Plan Customer Service (5503), have worked to create a new process that will allow us to close these cases.

Effective immediately, please follow the following procedures.

**If you have an OSIPM client who is no longer eligible for an OSIPM program:**

**Send the client a 7210 with a 539H.**

- At the top of the 7210, in black letters write: **APD/AAA DUE PROCESS-loss of OSIPM**. On the 539H check the 'other' box under "1. Verification needed for Medical assistance", add the following language: **"You must be evaluated for all Medicaid programs offered by the State of Oregon. In order to do this, we need some additional information which we will provide to the Oregon Health Authority. Please complete the enclosed application as soon as possible but no later than the date listed below, so that OHA can determine whether or not you qualify for other Medicaid programs."** Allow the client 45 days to return the 7210 to your office. Be sure the client

knows to return the 7210 to your office. If they send it directly to Cover Oregon, the process will not work properly. Make a tickler in ACCESS so you will know if the 7210 is not returned.

**If the 7210 is returned:**

- Fax the 7210 to 5503 at 503-373-7493.
- 5503 will notify branch transfer mailbox with MAGI determination.
- If client is found MAGI eligible, 5503 will close OSIPM and open MAGI. If there is more than one person on the OSIPM case, 5503 will make the MAGI client a NO on the existing case and leave the OSIPM case open.
- If client is found ineligible for MAGI, 5503 will send MAGI denial notice and APD/AAA office will send the OSIPM closure notice citing the original reason for closure and close the case.
- If the client is receiving LTC services, and is found MAGI eligible, Lauren Mitchell will coordinate process so service delivery is not disrupted.

**If the 7210 is not returned:**

Send a closure notice citing the original reason for closing the APD medical case. On the bottom of the closure notice add: **“On [mm/dd/yy] we requested that you complete and return an application so that you could be evaluated by the Oregon Health Authority for other Medicaid programs. We gave you until [mm/dd/yy] to complete this action. You have not returned the application; therefore, the Oregon Health Authority cannot determine your eligibility for other Medicaid programs. OAR 461-180-0085.”**

The Decision Notice Preparation Tips section of the APD Worker Guide is in the process of being updated to support these changes. In the meantime, contact Heather Williams if you need assistance with additional notice language.

**If you have an MSP client who is no longer eligible for an MSP program or is reducing from QMB to SMB or SMF**

**Send the client a 7210 with a 539H.**

- At the top of the 7210, in black letters write: **APD/AAA DUE PROCESS-loss of MSP.**
- On the 539H check the ‘other’ box under “1. Verification needed for Medical assistance.” Add the following language: **“You must be evaluated for all Medicaid programs offered by the State of Oregon. In order to do this, we need some additional information which we will provide to the Oregon Health Authority. Please complete the enclosed application as soon as possible, but no later than the date listed below so that OHA can determine whether or not you qualify for other Medicaid programs.”**

Allow the client 45 days to return the 7210 to your office. Be sure the client knows

to return the 7210 to your office. If they send it directly to Cover Oregon, the process will not work properly. Make a tickler in ACCESS so you will know if the 7210 is not returned.

### **If the 7210 is returned:**

- Fax the 7210 to 5503 at 503-373-7493.
- 5503 will notify branch transfer mailbox with MAGI determination.
- If client is found eligible for MAGI, 5503 will open MAGI case and APD/AAA can close the MSP case. This is not a closure or reduction, so there is no need to send a notice. If the client contacts your branch, please explain to them that they are now eligible for full Medicaid and to contact 5503 with any further questions.
- If client is found ineligible for MAGI, 5503 will send denial notice and APD/AAA can send a closure notice citing the original reason for the MSP closure and close the case.

### **If the 7210 is not returned:**

Send a closure notice citing the original reason for closing the APD medical case. On the bottom of the closure notice add: **“On [mm/dd/yy] we requested that you complete and return an application so that you could be evaluated by the Oregon Health Authority for other Medicaid programs. We gave you until [mm/dd/yy] to complete this action. You have not returned the application; therefore, the Oregon Health Authority cannot determine your eligibility for other Medicaid programs. OAR 461-180-0085.”**

The Decision Notice Preparation Tips section of the APD Worker Guide is in the process of being updated to support these changes. In the meantime, contact Heather Williams if you need assistance with the notice language.

For both of the above processes, if a 7210 is received, 5503 will track the determinations that are made and APD/AAA staff will be able to request a status check if there has been no communication within 60 days of faxing the 7210 to 5503 for a MAGI determination. **Prior to closing case:** If you have not heard from 5503 within 60 days, please email [APDreferrals@state.or.us](mailto:APDreferrals@state.or.us) with the subject line ‘APD/AAA STATUS CHECK.’ In the body of the email, provide as much case identifying information as possible, such as name, date of birth, social security number, etc. 5503 may have had to pend for additional information. Cover Oregon will follow up with those who are denied for MAGI programs to explain financial assistance or full-pay options.

### **Clients who were previously referred for a MAGI determination**

- Check MMIS to determine that there is no existing MMIS only MAGI case.
- If there is no existing MAGI case, follow the process outlined above for the appropriate program. In order to not overwhelm 5503, please use the following timeframes:

- **For clients referred** for MAGI in **2013**
  - Get a new signed 7210 with the correct DUE PROCESS verbiage and fax to 5503 at **any time**. You can also send 7210's for clients who have reviews due in June and who no longer meet APD program requirements.
- **For clients referred** for a MAGI determination in **Jan-March of 2014**
  - Get a new signed 7210 with the correct DUE PROCESS verbiage and fax to 5503 in **July or later**. You can also send 7210's for clients who have reviews due in July and who no longer meet APD program requirements.
- **For clients referred** for a MAGI determination after **March 2014**
  - Get a new signed 7210 with the correct DUE PROCESS verbiage and fax to 5503 in **August or later**.
- By August we should be caught up and should be sending over just newly ineligible clients, or those who had been missed. If you do miss a client, have them complete the 7210 as soon as you discover the ineligible OSIPM/MSP case.

**If 5503 has an open MAGI client who becomes Medicare eligible**

5503 does not determine eligibility for an MSP program unless the client is also eligible for a MAGI program that allows the client to have both MSP and MAGI Medicaid.

If the individual is not eligible for both a MAGI Medicaid and an MSP program, 5503 will notify APD/AAA staff through the branch transfer email and request the case be reviewed for MSP eligibility. The message will read something along these lines: "Medicare buy-in has notified the Oregon Health Authority Statewide Processing Center (5503) that the individual mentioned above is now receiving Medicare. It is requested that this individual be transitioned to a Medicare assistance program if they qualify."

If you receive this notice, please send the client a 539A and review for MSP. Often 5503 will not have any application to send to you. If they do, they will attach a scanned image to the request. When you have completed a MSP determination, use the branch transfer mailbox to notify 5503 of the MSP determination.

*If you have any questions about this information, contact:*

<b>Contact(s):</b>	Lauren Mitchell		
<b>Phone:</b>	503-945-6479	<b>Fax:</b>	503-947-5357
<b>Email:</b>	<a href="mailto:Lauren.e.mitchell@state.or.us">Lauren.e.mitchell@state.or.us</a>		