B. J. ake, Comm...er DHR

Department of Human Resources • Division of Family & Children Services • Mary Dean Harvey, Division Director
2 Peachtree Street, NW • Suite 19-490 • Atlanta, Georgia 30303-3142 • Phone: 404 651-8409 • Fax: 404 657-5105

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MEDICAID MANUAL (OFI Policy Manual, VOLUME II) TRANSMITTAL NO. 21

TO: County Departments of Family and Children
                Services State DFCS Staff

FROM: Mary Dean Harvey, Division Director
                Division of Family and Children
                Services

RE: Medicaid Policy Updates/Changes

PURPOSE: This manual transmittal updates Appendix A-1 with the new Person Needs Allowance (PNA) of $50 for nursing home residents. For ABD Medicaid the policy on Pooled Trusts has changed substantially in Section 2337. For Family Medicaid many sections changed "CSE" to "CSS". In Appendix H, the new CAR guidelines are provided. Children in Placement Medicaid addressed how to process Medicaid for a child (not in custody) of a minor child foster care parent. Several new forms have been added to the forms section.

DISCUSSION:

Specific changes to the Sections are discussed briefly under the Comments Section below.

UPDATES:

MANUAL TRANSMITTAL 21

Section	Instructions for Manual Maintenance	Page	Comments
2050	Remove and Replace	2	First line under completed application, added statement that a typed name in signature line is not acceptable.
2060	Remove and Replace	4	Under "Mandatory Forms", 5th bullet, changed to a signed Form 285 must be in CR, even if no TPR.
		10	In chart, move TPL Form 285 from Conditional to Mandatory and corrected it to say that it is only not required with Q Track.
2065	Remove and Replace	1	added statement that a typed name in signature line is not acceptable
			Added statement that a typed name in signature line is not acceptable.
		5	11th bullet, changed "enforcement" to "services".
		6	5th and 6th bullet under mandatory forms, removed exception for DMA285, and changed "enforcement" to "services".
		9	Moved DMA 285 to mandatory side of chart, changed "enforcement" to "services".
2133	Remove and Replace	1	Added MRWP as reference.
2160	Remove and Replace	1	Changed "CSE" to "CSS".
2162	Remove and Replace	2	Changed all references to "CSE" to "CSS".
2166	Remove and Replace	1	Changed "enforcement" to "services".
2170	Remove and Replace	1	Changed "CSE" to "CSS".
2174	Remove and Replace	3	Changed all references to "CSE" to "CSS".
2180	Remove and Replace	2	Changed all references to "CSE" to "CSS".

2184	Remove and Replace	1	Changed "CSE" to "CSS".
2201	Remove and Replace	2-3	Changed all references to "CSE" to "CSS".
		6	Changed all references to "enforcement" to "services".
2215	Remove and Replace	5	Corrected web site for WEB-1 instructions.
2230	Remove and Replace	1	Under DMA285, added statement that form must be signed and placed in record, deleted "only if TPR exists", deleted note that DMA 285 is not required if form 700 is used for application.
		6	2nd block of chart, removed statement that DMA 285 is not required if no TPR.
2235	Remove and Replace	1	Clarified NOTE.
2250	Remove and Replace	1-8	Changed all references to "CSE" to CSS", changed all references to "enforcement" to "services"
2313	Remove and Replace	5	Step 7, corrected to read "Proceed to Step 8".
2337	Remove and Replace	2	Under "Pooled Trusts", added text that trust had to be established prior to age 65 and by a disabled A/R. New last paragraph, for instructions for a Pooled Trust funded with proceeds from a settlement.
		3	New 1st paragraph, the remainder of a Pooled trust must be paid to the state upon the death of the A/R. New next paragraph that all Pooled Trusts must be sent to DCH Legal for approval prior to completion of the application or review.
2398	Remove and Replace	1	Bottom of the page, new bullet explaining that if a transfer penalty penalty has not been completed, that the remaining value of the penalty period may be recovered in Estate Recovery.
		2	In 2nd bullet, added statement that for the estate recovery to be delayed past age 21, the child must have become disabled prior to reaching age 21.
		3	Step 2, replace "ABD" with "L01/W01". Added that Swing Bed A/Rs should also get Form DMA 315. Step 4, changed "A/Rs" to "Applicants". 1st and 5th bullets, changed "closed" to "denied". 6th bullet, added "only if the AU was approved for any months". Step 5, changed "A/R" to "recipient" and added "Maintain a copy of the 327 in the case record."
2407	Remove and	1	Added a new paragraph at the end of the page stating that the person establishing a QIT must obtain POA.

	Replace	2	Top of page, after 1st NOTE, deleted sentence stating that it isn't necessary to retain an attorney to establish a
			QIT.
		5	Step 3 & 5, added phrase to "include the POA paperwork".
2418	Remove and Replace	2	Top of page, added new bullet on Continuing Medical Expenses. Under "Procedures", added CME to 2nd, 3rd and 5th paragraphs.
2430	Remove and Replace	2	Middle of page under EXCEPTION, deleted "non-LA-D" from before "AMN".
2578	Remove and Replace	1	Under "Basic Considerations" under the bullets, added statement regarding the additional $20 for PNA. Step 4, added new step for informing A/Rs and their representatives regarding Estate Recovery.
2581	Remove and Replace	1	New Step 3, to provide Swing Bed A/Rs with the same forms that are given to NH A/Rs including Estate Recovery forms.
2640	Remove and Replace	1-3	Changed all references to "CSE" to "CSS".
2657	Remove and Replace	1	Changed all references to "enforcement" to "services".
		2-4	Changed all references to "CSE" to "CSS"
2663	Remove and Replace	1	At bottom of the page, removed statement that income given to an FM AU by an SSI recipient is budgeted as a contribution
2810	Remove and Replace	1	IV-E and Medicaid application faxed to RevMax Intake and to appropriate RevMax regional office.
		2	RevMax Intake will remove child from active Food Stamp, TANF, LIM and RSM cases for the month of application. Removed PeachCare for Kids for opening a case on SUCCESS.
2850	Remove and Replace	6	Address Medicaid for child (not in custody) of a minor parent foster child.
Appx A-1	Remove and Replace	3	PNA going from $30 to $50.
Appx. D	Remove and Replace	4	Added documentation of the actual date of the child's removal from the home when removing a child from an active FS, TANF, LIM or RSM case.
		5	Added procedures for Medicaid for a child of a minor parent foster child who is not in custody.
		9	Added standard for documenting if form 138 was signed or mailed.

		10	Document citizenship status behind each AU member's screen, document that Declaration of Citizenship form signed/mailed, and that DMA285 was signed/mailed.
		13	Added Patient liability/Cost Share Reconciliation screen.

Appx F	Add or Replace as indicated		Replace Forms Table of Contents Replace Form 95 (Sp) Replace Form 222 (Sp) Replace DMA Form 315 Add DMA Form 400 (paper copy only) Add Form 700 (Sp) Add form 809 Add form: Part D Complaint Casework Checklist
Appx H Admin. Overview	Remove and Replace	1	Added QC rebuttal procedures, deleted "if applicable from bullet addressing DMA285
		2	Added sample size for 2nd level reviews.
		2-3	Added definition of correct, deficient and error case for FM, referenced CAR selection process guide and FM Reading Guide.
Appx H Forms	Add to Family Medicaid Review Forms		Added CAR selection process guide for FM, added new FM Reading Guide
Appx I	Remove and Replace	9-10	Made major changes to "Entering SD medical expenses on SDME" based on SUCCESS changes.
		11	"Approving an A/R for EMA", Step 6, deleted "Enter the date the physician indicates…." through " The ending date cannot exceed 90 days from the begin….." New sentence "The Term Date should coincide with the 526 End Date and not be in the future. Step 7 is new regarding entering the EMA service dates in Option P. Under "How to enter countable Burial Funds for Non-FBR COAs", Step 1, added "On RES1".
		32	"Denying/Closing a KB Case for not Meeting LOC", Step 3, deleted "complete the following in the first ongoing benefit month….." through "If not, you will have to wait until the beginning of the next month….." Replaced that with "close in the month in which the 30 day appeal time falls." Step5, added "and commit to the data base. Do NOT waive notice."
		33	Added 3 new sections: "How to Complete Add-A-Spouse to AMN", How to Reinstate an S99 AU" and "How to Reopen an S99 and S95 AU".

		34	Moved "Processing an LA-D Case with a QIT" from page 13 to 34.
Appx J	Remove and Replace	9	Deleted procedures for closing cases when there are <10 days left in the month.