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Commissioner



**Georgia Department of Human Services**  
Aging Services | Child Support Services | Family & Children Services

**MEDICAID MANUAL (OFI Policy Manual, Volume II) Transmittal NO. 73**

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

FROM: Candice L. Broce, Commissioner

RE: Medicaid Policy Updates/Changes

DATE: August 16, 2024

The purpose is to provide DFCS field staff an update to the Medicaid Policy Manual as revised to be in accordance with the most current policy clearances received from the Department of Community Health. Updates include addition of policy, grammar, and format changes, and clarifications issued by DCH. A detailed overview of all revisions to the Medicaid manual is listed below.

**For All Classes of Assistance, whether ABD or Family Medicaid:**

- **2050 Application Processing Overview**
  - Updated hyperlinks
  - Updated “PR” to “AREP” and “personal” to “authorized”
  - Under Where To Apply: updated “Medicaid” to “Medical Assistance” and added DCH website
  - Under Who To Apply: Added clarification that AREP designation can be verbal or written, but if written, then applicant’s signature is required.
- **2051 Verification**
  - Updated hyperlinks
  - Updated “PR” to “AREP” and “personal” to “authorized”
  - Updated Medicaid to Medical Assistance
  - Removed GA from GA Gateway
  - Under Self-Attestation: added “(e.g.SNAP or TANF)” and removed last two sentences referring to PCK verifications.
  - Under Resolving Inconsistencies 1 & 2: Added what to enter as verification. 3- removed “paper documentation” and added 3<sup>rd</sup> party verification to verify income and deductions.” Added NOTE regarding client statement of self-employment

- income exceeding FPL is acceptable to process denial
- Added MAGI deductions as exception for accepting as client statement
- Under Medicaid Verifications: next to last bullet – added “(e.g. c/s of self-employment income, etc)” as example
- Under Documents: updated last sentence.
- **2230 Third Party Liability**
  - Updated/added hyperlinks
  - Updated “Medicaid” to “Medical Assistance”
  - Updated “eligibility worker” to “Case Worker”
  - Updated “TPR” to “TPL”
  - Under Trusts and Other Legal Documents: updated addresses to Trust Unit and added a note regarding email being the contact preference for the GA Trust Unit. Added 947 to “QIT Approved Format Deviation Form”
  - Under Family Medicaid TPL Requirements: Last paragraph revised to begin new paragraph with “Children covered...” Deleted “during Intake or Renewal. PeachCare for Kids cannot be terminated for TPL during continuous eligibility.” Added “PCK enrollees may only be denied/terminated for TPL at application or renewal due to continuous eligibility restrictions.” Added “below” after “NOTE: For children in DFCS custody, reference Problem Resolution with Medicaid Billing and TPL, Children in Place.”
  - Under Health Insurance Premium Payment Program & Children in Placement: update format of HMS address
  - Step 7 of Problem Resolutions with Medicaid Billing and TPL: updated phone # for HMS
- **2415 Self-Employment**
  - Under Family Medicaid Business Expense: Updated website address for business expense guide, Removed “Line 27 on” and added “Schedule 1” after Form 1040
  - Added hyperlink
  - Added Heading Self-Employment Losses Budgeting Procedure and the accompanying procedure until Self-Employment Income Budgeting Procedures section.
  - Under Verification: updated “federal income tax return” with “(including 1040, Schedule 1 and all other applicable Schedules)”
- **2706 Medicaid Renewals**
  - Updated “Medicaid” to “Medical Assistance”
  - Updated “PR” to “AREP” and “personal” to “authorized”
  - Updated EW to Case Worker
  - Added Continuous Eligibility information
  - Replaced Work# with Truv
- **Appendix F – Forms**
  - Removing from PAMMS & hyperlinks from TOC:
    - 6Ai Instructions
    - 7
    - 285i TPL Instructions
    - 298Q Elderly Q Track Renewal
    - 942i IME Verification Instructions

- 957 Resource Clearance
- 962i Instructions
- 981 ABD Contact Letter/Verification Checklist
- 992 MAO Control Sheet
- ABD CAR Reduction Request
- Community Care Communicator
- Added Spanish translations:
  - form-109SP-SSIContMedDetermNotice(SP)
  - form-216SP-DecOfCit(SP)
  - form-217SP-AffidavitOfIdentityUnder16(SP)
  - form-218SP-ListOfVerifCitIdentity(SP)
  - form-219SP-AffidavitofCitizenship(SP)
  - form-328SP-QRFReviewForm(SP)
  - form-411SP-UndueHardshipWaiverApplication(SP)
  - form-512SP-NoticeOfEMAEligibility(SP)
  - form-937SP-QITReviewLette(SP)
  - form-945SP-QITTrustees Guide(SP)
  - form-946SP-QIT WkSht&FAQ(SP)
  - form-955SP-NoticeOfRevOfPromissoryNote(SP)
  - form-988SP-NoticeOfReviewOfAnnuity(SP)
- Table of Contents (TOC)
  - Adding to PAMMS.
  - Replacing ODIS hyperlinks with PAMMS hyperlinks.
  - Removed “Instructions” column; standalone instructions are listed on a separate line.
- 1 - OSAH form 1 MA
  - Updated version received from Fair Hearings Manager
- 6A - LOC
  - Combined form and instructions
  - Moved page # to bottom of page
- 89 - MIPPA Cover Letter
- 118 - Request for Hearing
  - Added to PAMMS
- 124 - Application for Health Insurance Premium Payment (HIPP)
- 125 - CHIPRA Application for Children’s Health Insurance Program Reauthorization Act
  - Updated version
  - Added to TOC
- 214 - Medicaid Notification Form
  - Updated formatting
- 306 - Annuity Issuer Notification
  - Updated formatting
  - Changed reference to Eligibility Specialist to Case Worker
  - Changed reference to AU # to Case #
  - Removed reference to County office contact
- 403 - Adoption Assistance Memorandum
  - Updated version received from RevMax

- 526 - Physician's Statement for Emergency Medical Assistance
  - Updated formatting
- 701 - Q-Track Brochure
  - Updated formatting
  - Updated limits to 2024 throughout
  - Under How to Get Help: removed word “new” in first sentence.
  - Under How to Apply: updated instructions and methods of submitting an application
  - Under How to Can I Get More Information: removed instructions to check the phone book and added website to locate County office address, added contact information for Georgia SHIP and DFCS Call Center.
- 942 - IME Verification
  - Combined with Form 942i to include instructions on last page of form
- 947 - QIT Approved Format Deviation
  - Assigned # to form
  - Updated formatting
  - Removed references to County office
- 948 - QIT Template
  - Assigned #
- 949 - QIT Checklist
  - Assigned #
  - Updated formatting
- 956 - SNT Review Routing Form
  - Assigned #
  - Updated formatting
  - Updated submission information to include email and new address
  - Changed AU to Case #
  - Added Case Worker Email field
  - Added FAX and phone # to top of form
- 960 - IME Pricing Document
  - Updated general formatting
  - Updated list of allowed items
  - Updated CCSP to EDWP/CCSP
  - Added note to Dental Services regarding explanation of \*
  - Corrected incomplete sentences per DCH suggestion.
- 966 - Absent Parent Information Form
  - Updated formatting
  - Assigned # to form
  - Added space for a total of 4 absent parents for the household
  - Removed AP Description fields
  - Added Employer Contact field
  - Added Major Medical Y/N field
- 967 - NEMT Information Sheet
  - Updated formatting
  - Updated all references to Non-Emergency Transportation (NET) to Non-Emergency Medical Transportation (NEMT)
  - Updated contacts in chart

- Assigned # to form
- 970 - VA Communicator Form
  - Updated formatting
- 984 - Burial Contract Verification Form
  - Updated formatting
  - Updated reference to MES to Case Worker
- 985 - ABD Burial Exclusion and Designation
  - Updated formatting
  - Assigned # to form
  - Added Date field at top of page
  - Added Funeral Home Address field in Section 1
  - Added reference letters (D – G) for calculations
  - Section 5: Added non-FBR and FBR to verbiage referencing
- 986 - MAO Cemetery Lot Verification
  - Updated formatting
  - Added field for Case Worker phone #
  - Added field for cemetery address
  - Added instructions to call Customer Contact Center and CCC phone #
- 987 - Designation of Cemetery Lots
  - Updated formatting
  - Added Cemetery Address field
- 991 - Property Records Request
  - Updated formatting
  - Removed reference to SOP and application date
  - Changed reference to County office to Division contacts
- 998 - Notice of Termination of Medicaid Benefits Due to Contracts
  - Assigned #
  - Updated formatting
  - Added Case # field
- 2337 - Health Check Brochure / EPDST
  - Updated version
- 5460 - HIPAA Notice of Privacy Practices
  - Updated to remove signature page
- No # - GMWD Disabilities Fact Sheet
  - Updated to version on DCH website
- No # - WHM PST
  - Updated to version on Gateway with updated letterhead.

**For ABD Medicaid Only:**

- **2060 ABD Medicaid Application Processing**
  - Updated “PR” to “AREP” and “personal” to “authorized”
  - Updated “EW” to “Case Worker”
  - Updated/added hyperlinks
  - Under Application Requirements: Updated list of acceptable applications with form names and listed in numerical order

- Under Mandatory Forms: revised chart reference from “2060.1” to “2060.2”
- Added Form #'s for QIT forms—see Appendix F above for details
- Added clarification that AREP designation can be verbal or written, but if written, then applicant’s signature is required.
- Chart 2060.2-ABD Form Requirements: reformatted chart, removed 1984 Widow(er) & 1972 COLA COAs; added Forms 129 & 985 to Conditional category.
- **2316 Homeplace ABD Medicaid**
  - Updated hyperlinks
  - Under Basic Considerations: Removed “this page” after See DRA policy change below. Updated Excess Home Equity Limit formatting and added 2024 amount.
- **2336 Trust Property, Medicaid Qualifying**
  - Added hyperlinks
  - Updated “TPR” to “TPL”
  - Under Procedures: Deleted original Step 3 due to duplicate information from Step 1. Renumbered the Steps 3 through 6. Step 6 Added an email address, fax # and a note regarding email being the contact preference for the GA Trust Unit and a phone # to contact for questions.
- **2337 Trust Property-OBRA ‘93**
  - Updated/Added hyperlinks
  - Under Basic Considerations: Burial Trusts and Procedures - Added an email address, fax # and a note regarding email being the contact preference for the GA Trust Unit and a phone # to contact for questions.
  - Under Procedures, Step 6: Added an email address, fax # and a note regarding email being the contact preference for the GA Trust Unit and a phone # to contact for questions.
- **2338 Trust Property**
  - Added hyperlinks
  - Under Procedures: Added an email address, fax # and a note regarding email being the contact preference for the GA Trust Unit and a phone # to contact for questions.
- **2346 Special Needs Trust**
  - Added hyperlinks
  - Under Procedures: Added mailing address and a note regarding email being the contact preference for the GA Trust Unit.
- **2407 Qualified Income Trust**
  - Added/updated hyperlinks
  - Updated “TPR” to “TPL”, “MES” to “Case Worker”, and “PR” to “AREP”
  - Under Basic Considerations, Treatment of Income: Removed Page # reference “page 3 of this section below.”
  - Under Procedures: Step 1- Added new QIT Form #'s; Step 3 - Added an email address, fax # and a note regarding email being the contact preference for the GA Trust Unit and a phone # to contact for questions, Step 5 – Added form # 947 to “QIT Approved Format Deviation Form”, changed “mail” to “send”, corrected address to GA DCH Trust Unit, included an email address, fax # and a note regarding email being the contact preference for the GA Trust Unit and a phone # to contact for questions. Replaced “Retain copy of QIT in case record” with “Upload a

copy of the QIT into Document Management.” Step 9 – added QIT Form # 937. Step 12 - changed “mailed” to “sent”, corrected address to GA DCH Trust Unit, included an email address, fax # and a note regarding email being the contact preference for the GA Trust Unit and a phone # to contact for questions.

- Under Change in Trustee: Replaced “Retain a copy for the case record” with “Upload a copy into Document Management.”
- **2708 ABD Medicaid Changes**
- Under Basic Considerations: Added Continuous Eligibility information

### **For Family Medicaid Only:**

- **2065 Family Medicaid Application Processing**
  - Updated “PR” to “AREP” and “personal” to “authorized”
  - Updated EW to Case Worker
  - Updated/added hyperlinks
  - Updated “e mail” to “email”
  - Under Application Requirements: Updated list of acceptable applications with form names and listed in numerical order; replaced “(not typed name on signature line)” with “(either written or electronic such as on a Gateway application)” and replaced “logged” with “registered in the system”.
  - Under Interview Requirements: Added clarification that AREP designation can be verbal or written, but if written, then applicant’s signature is required.
  - Under applicant’s right to the following: added “confidentiality” and “in the processing of the application” to non-discrimination.
  - Under Mandatory Forms, note regarding 138: Clarified a separate Form 138, 216, and 285 are not needed if Form 94A Streamlined app is submitted.
  - Under Standard of Promptness: Clarified 10-day SOP for newborns by adding definition of Newborn
  - Chart 2065.1-FM Form Requirements: reformatted chart, added \* to 138 with explanation in Note when 138 is required.
- **2166 Transitional Medical Assistance (TMA)**
  - Added/Updated hyperlinks
  - Basic Considerations: added “referred herein as a TMA-qualifying event” per memo dated 5/17/2024 and revised the determination of the first month of TMA is now prospective and removed the previous look back criteria
  - Under Reporting: Added Form 328 to QRF and table “Summary of TMA Quarterly Reporting Requirements”
  - Under Additional Six Months Extension: added Note regarding Continuous Eligibility Information
  - Under Procedures: added “Form 328” with hyperlink to Steps 1 & 3
  - Under TMA Special Considerations, added Chart 2166.1
- **2194 PeachCare for Kids®**
  - Updated hyperlinks
  - Under Requirements: description was expanded to include additional information
  - Under Procedures: Added PCK PGW and PGW Post-partum information
  - Under Other Considerations: Added premium payment update regarding when

coverage/eligibility would begin, Continuous Eligibility information, how premium payments can be submitted, co-payment information, and reformatted Premium Schedule by FPL chart

- **2610 MAGI Budget Groups/Assistance Units**
  - Updated/added hyperlinks
  - Under Basic Considerations, Budget Group Composition (Non-Tax Filers): Added “half” to 4<sup>th</sup> bullet.
  - Under Budget Group Composition: Added dependent tax filing threshold amount for tax year 2023
  - Under Procedures: Step 2 – Removed “by another tax filer” in 2<sup>nd</sup> bullet and added a note to review BG exceptions in Section 2245. Step 3 – added “half” to 4<sup>th</sup> bullet.
  - Revised Chart 2610.1
  - Under NOTE for Chart 2610.2 – Added “half”
- **2655 Family Medicaid Deductions**
  - Updated hyperlinks
  - Under Basic Considerations: Added to allow Health, Dental, Vision deductions even if not specified as Pre-tax on check stubs and Added Verifications requirements.
  - Updated “GIC” to FPL and “LIM” to PCT
- **2712 Family Medicaid Changes Overview**
  - Updated hyperlinks
  - Removed “Deemed” from Newborn
  - Added Continuous Eligibility information
- **2715 Family Medicaid Changes In Income**
  - Updated hyperlinks
  - Removed “Deemed” from Newborn
  - Added Continuous Eligibility information
  - Under Procedures, New Earnings: Removed P99 & F99 SUCCESS codes
  - Under Procedures, Income of a Child: Removed 2018 & 2019 tax year info and added “Refer to Section 2610, MAGI Budget Groups/Assistance Units for each tax year threshold amount.”
- **2716 Family Medicaid Miscellaneous Changes**
  - Added/Updated hyperlinks
  - Removed “Deemed” from Newborn
  - Under “Children Under 19 of Age Medicaid Recipient Reaches an Age Limit”-last bullet updated with verbiage to include Continuous Eligibility restrictions. Updated the Note that if ineligible for any other COA to refer to FFM/Georgia Access.
  - Added Continuous Eligibility information
- **2840 IV-E Budgeting**
  - Updated hyperlink
  - Under Processing: Updated Foster Care Payment Standard chart with current information effective 7/1/22



