



**DATE:** December 16, 2013

**OPERATIONS MEMORANDUM 13-12-04**

**SUBJECT:** Outbound Federally-Facilitated Marketplace (FFM) Account Transfers

**TO:** Executive Directors

**FROM:** Tom Strickler  
Director  
Bureau of Operations

**PURPOSE**

To inform County Assistance Offices (CAOs) of the outbound FFM account transfer procedure that was effective statewide on December 2, 2013.

**BACKGROUND**

The ACA makes several major changes to the Medical Assistance (MA) application process by requiring a single, streamlined application for all insurance affordability programs, which include MA, Children's Health Insurance Program (CHIP), Advance Premium Tax Credits and Cost-Sharing Reductions. In accordance with the federal requirements, individuals may submit MA applications through the FFM, Commonwealth of Pennsylvania Access to Social Services, CAOs, or by phone. On December 2, 2013, CAOs began transferring electronic accounts of individuals determined ineligible for MA to the FFM for evaluation for other insurance affordability programs. This document discusses the procedure CAOs must follow when account transfers are made to the FFM.

**DISCUSSION**

When individuals are determined ineligible for MA, CAOs will transfer their electronic accounts to the FFM for evaluation for other insurance affordability programs. The Insurance Affordability Eligibility Summary screen, located right before the Case Submit screen, displays a referral code for each individual on the application. For individuals whose electronic accounts are to be transferred to the FFM, the "F- FFM Referral" code is displayed. See [Attachment 1](#) for an example of the Insurance Affordability Eligibility Summary screen.

Caseworkers are able to check the status of the transfers through the Case Management (CM) Inquiry Menu in eCIS, similar to the way the status of CHIP referrals is checked.

The following changes have been made to eCIS for caseworkers to search for FFM account transfers:

- References to Pennsylvania Insurance Department have been removed from the search options on the CM Inquiry Menu screen.
- A “Referred To” column has been added to the search results table on the Electronic Referral Search Results screen. It displays the location to which the referral was sent.
- The Electronic Referral Search Results screen displays an FFM hyperlink in the Web App # column for individuals referred to the FFM. This link takes the caseworker to the referral details screen.
- The Electronic Referral Search Results screen showing referral details displays the status of the FFM referral and the date the FFM received the referral (if applicable). The status field displays one of the following values:
  1. Transfer Pending.
  2. Received by FFM.
  3. Transfer Failed.
- The Quick Links menu contains an “Electronic Referral Search” option for all screens in CP mode.

See [Attachment 2](#) for an example of an FFM Referral Search.

Individuals whose electronic accounts are transferred to the FFM receive a notice informing them that they are referred to the FFM for a final determination. This notice is automatically generated by the system and requires no caseworker action. Caseworkers do have the ability to select or modify the notice on the Client Notice, or Consolidated Client Notice screens. This notice is not sent to any entities considered to be providers.

### **NEXT STEPS**

1. Share and review this information with appropriate staff members.
2. Please contact your area manager if you have questions regarding this Operations Memorandum.
3. This Operations Memorandum will become obsolete upon release of revised Handbook changes.

Attachments