



**DATE:** 8/30/2017 **Revised 3/15/2018**

**OPERATIONS MEMORANDUM #17-08-05**

**SUBJECT:** **Revised -** Medical Assistance (MA) Fast Track Enrollment Enhancements

**TO:** Executive Directors

**FROM:** Inez Titus  
Director  
Bureau of Operations

**PURPOSE**

To inform County Assistance Offices (CAOs) of enhancements to the existing MA Fast Track enrollment process. These enhancements will be implemented statewide August 21, 2017.

**BACKGROUND**

In early 2016, the Department of Human Services (DHS) implemented the MA Fast Track enrollment initiative that was outlined in [OPS16-02-04](#). The goal of the initiative was to increase MA enrollment through a streamlined and simplified automated enrollment process while reducing administrative burden.

To further streamline and simplify the process, DHS will be implementing an automated identification process which will identify individuals eligible for MA. Identification occurs immediately after the processing of Supplemental Nutrition Assistance Program (SNAP) or Low-Income Home Energy Assistance Program (LIHEAP) benefits. The MA Fast Track consent form ([PA 1945 Attachment 1](#)) will be mailed, and when the form is returned, it will be processed for automated enrollment.

**DISCUSSION**

Individuals eligible for SNAP and LIHEAP with gross household income at or below applicable Modified Adjusted Gross Income (MAGI) MA Federal Poverty Level (FPL) for their age and household size will be identified in real time during the processing of SNAP/LIHEAP applications and SNAP renewals.

## **Identification**

The entire household must be determined eligible for SNAP/LIHEAP in any of the following case processing modes for any household member to be selected for MA Fast Track identification:

- Case Open.
- Program Add.
- Individual add (for SNAP only).
- Reapplication (for SNAP only).

Individuals are determined eligible for MA Fast Track if they meet the following criteria:

- Recipients age zero to 64.
- U.S. citizen or have satisfactory immigration status.
- Individuals who are active in CIS.
- Not currently enrolled in MA or Cash.
- Not an individual with a disability or receiving Medicare.
- Not enrolled in transitional or Non-Continuous Eligibility (NCE) SNAP benefits.
- Not rejected for MA on the day of MA Fast Track identification.
- Household income is at or below the applicable MAGI income limit (plus five percent disregard).
  - **Pregnant women and children under one** - less than or equal to 220 percent FPL.
  - **Children age one - five** – less than or equal to 162 percent FPL.
  - **Children age six - 20 and adults under 64 ½** – less than or equal to 138 percent FPL.

## **Ways to Provide Consent**

Individuals who are identified as eligible for MA Fast Track enrollment will be listed on the consent form, PA 1945. Each household will receive only one form. The form will be populated with a due date 30 days from the mailing date. An automated case comment will be generated to indicate the consent form was sent and it will list the individuals identified as eligible.

Individuals can provide consent via one of following options:

- Completing consent via COMPASS by logging into (or creating) their MyCOMPASS Account;
- Calling the Consumer Service Center; or

- Returning the consent form to the CAO. The system will read the barcode when the form is scanned.

An automated case comment will also be generated when an individual provides consent through any of the three options.

Individuals are instructed to provide consent within 30 days, however the consent will be accepted up to 90 days from the mailing date. If returned by mail, the clerical worker will scan the consent form upon receipt. The eligibility begin date for MA enrollment through Fast Track is the date that the consent form is received by the CAO.

**NOTE:** If the consent form is not scanned on the day the CAO receives the form, the received date in Imagertrust must be changed to match the date stamp on the document.

### **Imaging Consent Exceptions**

The CAO may need to take action in situations when there is an imaging exception due to one of the following reasons:

- The barcode or responses are not readable on the consent form.
- The individual responds “Yes” and “No” to the tax dependent or income questions on the consent form.
- There are multiple consent forms for a household.
- The consent form is not signed

If the barcode is unreadable or the system fails to complete auto-indexing after the form is scanned, manual indexing is required. The clerical worker will:

- Enter PA1945 for Form ID in Imagertrust.
- Receive an “index and attach” alert on their dashboard.
- Enter the Notice ID while completing the indexing and attaching assignment.

If an imaging exception occurs, the CAO will receive an MAFT 066 alert. When the caseworker clicks on the alert, he/she will be taken to the Fast Track Consent Form screen in eCIS to manually enter consent information.

The CAO will take the following actions:

- Enter “Yes” for an individual’s MA enrollment consent if both “Yes” and “No” are filled in or left blank on the form.
- Enter “Yes” to the tax dependent or income questions if both “Yes” and “No” are filled in on the form.

- Enter “No” to the tax dependent or income questions if left blank on the form.

### **Temporary Process for Unsigned Consent Forms**

~~The CAO will follow these steps when a consent form is received without a signature:~~

- ~~• Clerical will AP MA after opening mail that contains an unsigned consent form.~~
- ~~• Clerical will cover the barcode before scanning the form as miscellaneous mail, and enter Tag Comment “PA 1945 unsigned consent form”.~~
- ~~• Clerical will give the paper consent form to the caseworker.~~
- ~~• The caseworker will receive an image alert, and narrate that an unsigned consent form was received.~~
- ~~• The caseworker will mail the unsigned original consent form along with a PA 253 to the client for a signature, and set a due date of 10 days.~~

~~If the consent form is not returned or returned without a signature the caseworker will reject the MA application, using reason code 042, for failure to provide verification after the due date has passed.~~

~~———— If the consent form is returned with a signature, the caseworker will first reject the MA application, using reason code 326. Then the CAO will enter the original received date in Imagetrust when the form is scanned, to initiate fast track enrollment on the correct begin date. The CAO must narrate all actions.~~

~~**NOTE:** If an imaging exception occurs because the client signed in the wrong location on the form, the caseworker should enter the answers to the questions on the Fast Track Consent screen and submit for automation.~~

~~Once a caseworker clicks “Enter”, the consent information will be sent for MA Fast Track automated processing.~~

### **MA Fast Track Outcomes**

Once the individual provides consent, there are three possible outcomes for a Fast Track application. The application is:

1. **AUTO-OPENED:** An auto opening will require no action by the caseworker and the following automated system actions will occur:
  - System application created and MA request generated.
  - Tax filing status will be based on the information already available in the system, and Employment and Training Program code will be defaulted to 22 if this information is not available in case record.

- Parents/caretakers and children age zero - 18 with income less than or equal to 33% FPL will be assigned to MG 27.
- Individuals with income above 33% FPL will be assigned to MG91 category if age 19 and over, or assigned to MG00 if age zero - 18.
- Notice of eligibility issued with Fast Track notice code 971, option A (See [Attachment 2](#)).
- When the household is receiving SNAP, the renewal date of the Fast Track auto-opened MA budget will be aligned to SNAP renewal date if less than or equal to 12 months.
  - If SNAP renewal date is greater than 12 months or the household is only receiving LIHEAP, the MA renewal date will be set to the end of the 11<sup>th</sup> month.
  - If two or more budgets are open with different renewal dates, the earliest date will be used.
- Auto case comment populated in eCIS for each individual enrolled in MA through Fast Track automation.
- Automation Processing Summary generated and available for review.

**NOTE:** A full MA determination is not performed for auto-opened Fast Track recipients. The individuals are mapped to MG 91, MG 00, or MG 27, and eligibility result details will not be available.

The caseworker must re-evaluate eligibility for a Fast Track recipient using a full Modified Adjusted Gross Income (MAGI) determination at the next budget renewal or maintenance action that results in eligibility to be run on the case.

**2. REJECTED:** An individual's circumstances have changed since they were selected as potentially eligible for MA Fast Track enrollment, and the individual no longer meets the Fast Track eligibility criteria.

An individual is rejected from Fast Track auto-enrollment for the following reasons:

- Consent date is older than 90 days from consent mailing date.
- Already receiving MA or Cash.
- Case is closed.
- Individual was removed from the case.
- Individual is now inactive.
- Individual is citizenship code 5 (not a citizen).

The following automated system actions will occur for a rejected Fast Track application:

- System application created.

- An appealable notice of ineligibility issued with notice code 971; options B through F ([see Attachment 2](#)).
- Auto case comment populated in eCIS.
- Automation Processing Summary generated and available for review.

**NOTE:** No Federally Facilitated Marketplace or Children’s Health Insurance Program referrals will be made for rejected Fast Track applications.

**3. EXCEPTIONED:** While it is anticipated that the majority of Fast Track applications will be auto-opened, there may be some applications that exception to a caseworker to process eligibility manually because an individual meets exception criteria.

In these instances, the CAO will review the case, and request additional information from the individual, when necessary, to make a full eligibility determination.

Exception reasons are:

- **Consent form is not signed in the signature field.**
  - The caseworker will send a PA 253 along with the centrally printed PA 1902, Rights and Responsibilities form (See [Attachment 3](#)), to collect the client’s signature. The PA 1902 can be selected from the Centrally Printed Form drop-down on the Pending Verification screen by selecting “999-other” from the Unverified Item drop-down.

The caseworker will enter the following in the Additional Information section on the Pending Verification screen: “Please review and sign the Rights and Responsibilities form to complete your MA Fast Track request.”

If the signed PA 1902 is not returned by the due date, the caseworker will reject the MA Fast Track application using reason code 042.

- If an exception occurs because the client signed in the wrong location, the caseworker should accept this signature for the MA Fast Track application.
- Citizenship code of individual is two or three, and they are not under 21 years of age or pregnant.
- Citizenship code of individual is four or six.
- Individual now has a disability record.
- Individual is now enrolled in Medicare.
- Individual is now open in Family Planning.

- Individual now has a missing SSN.
- Case is in an active workflow.
  - If a case is in an active workflow, two attempts will be made on two consecutive nights to complete auto-enrollment for the MA Fast Track application. The application exceptions out to the caseworker only after the second unsuccessful attempt at auto-enrollment.
  - Non-MA applications in an active workflow will be exceptioned. If the non-MA application is not in an active workflow, the MA fast Track application will be auto-opened.
- Case has a future close date due to an inter-county transfer.
  - **IMPORTANT:** The caseworker in the losing county must authorize an MA eligibility period as an NCE in the losing county.
- Other individual(s) on the case exception out from the auto enrollment process.
- Case has an MA application pending.
- Individual answered “Yes” to the tax dependent and/or household members under age 18 with income questions on the consent form.
- System encountered an error during the auto-enrollment process.

When an application exceptions from Fast Track enrollment, the application can be identified by the following methods:

- Automated case comment - a comment will automatically populate stating that MA was not processed due to an exception.
- Automation Processing Summary - a searchable record of the exception will be available which details the reason for the exception.

A system application will be created for Fast Track individuals regardless of the outcome of the application. Auto-opened, rejected, and exceptioned applications will have an application number in eCIS which is searchable in Application Processing (AP). A disposition code of 971 will be displayed in AP for auto-opened or rejected applications. An auto-opened application will have a status of approved.

When the MA Fast Track application exceptions from the auto-enrollment process, the application will appear as “MA FST TRK” on the caseworker’s Workload Dashboard (WLD).

The caseworker must follow the steps listed for processing exceptions:

- a. Use current application processing procedures and review the individual for MA eligibility.

**NOTE:** The application date for the MA Fast Track application is the date the consent was received, which is captured in the MA Fast Track comment. The caseworker should check the program request screen, and change the begin date if it does not match the date the form was received.

**NOTE:** A green alert will appear on the case summary screen notifying the caseworker that the application is Fast Track and that information may be incomplete.

- b. Process application using information already in the case record and available data source information.
- c. Request information or verification from the individual only if additional information is needed and not available to determine MA eligibility.
- d. Run eligibility and send the appropriate existing system notices for eligible and ineligible individuals.
- e. Set the MA budget renewal date using existing budget alignment policy.

PA 600R renewal applications have been modified to include a checkbox for individuals to request MA. If an individual marks this box, the caseworker will use current policy for processing an MA application for the individuals indicated in the request. The consent form will not be sent when an MA request is processed at renewal.

### **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.

#### **Attachments:**

[Attachment 1](#) – Fast Track Consent Letter (PA 1945)

[Attachment 2](#) – Eligible and Ineligible Notice text for Fast Track - Notice 971 Opt. A – F

[Attachment 3](#) – Rights and Responsibilities form (PA 1902)