**Policy Clarification**

**Medical Assistance – All**

**PMA-21408-376**

**Submitted:** **June 26, 2023** **Agency: CAOs**

**Subject:** **Use of Data Exchange Information during the Medical Assistance (MA) Renewal Process**

**Question: If a renewal packet is sent out for MA and income verification is not returned with the packet, but the income can be verified using available data sources and is reasonably compatible, can the renewal be processed?**

Here are a few examples:

* MG91 recipient – Recipient started a new job prior to the renewal being sent out and quarterly wage information was not available for an ex parte review before packet was sent. Completed renewal is returned without wage verification but wage information is now available on Exchange 1 and is reasonably compatible with what was reported on the renewal form.

* MG27 recipient – Ex parte review revealed new Unemployment Compensation (UC) that would reduce eligibility, so a renewal packet is sent. The completed renewal is returned without proof of UC, but the information reported on the renewal matches information available on Exchange 2.

Would we be able to apply reasonable compatibility for the above examples?

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| **Response By: Division of Health Services** |  **Date: June 26, 2023** |  |  |
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If an ex parte review is conducted prior to generating the renewal packet, and the packet is returned signed but without all income verification, exchange information can be used to process the renewal if it is reasonably compatible. If the packet is returned unsigned but the verification can be obtained electronically, the County Assistance Office will reach out to the household to request a signature.

If an ex parte review is NOT conducted prior to generating the renewal packet, an ex parte review of all eligibility factors (including income and resources) must be completed when processing the renewal. A signature is not required to process an MA renewal if an ex parte review was not conducted prior to generating the renewal packet.

**NOTE:**  If eligibility for the Supplemental Nutrition Assistance Program (SNAP) or Cash Assistance is being renewed at the same time as MA, a signature is required to process the SNAP and/or Cash Assistance portion(s) of the renewal.

[PMA-20609-376](https://pagov.sharepoint.com/%3Aw%3A/r/sites/DHS-OIM/Policy%20Clarifications/Use%20of%20Data%20Exchange%20Information%20During%20the%20Medical%20Assistance%20%28MA%29%20Renewal%20Process.docx?d=wb80e063b9c43448d84bf9e03d8259789&csf=1&web=1&e=17565f) is obsolete with the publication of this Policy Clarification.

For more information please see:

[Ex Parte Review Desk Guide](https://pagov.sharepoint.com/sites/DHS-OIM/Desk%20Guides/Ex%20Parte%20Review%20Desk%20Guide.pdf)

[Reasonable Compatibility Desk Guide](https://pagov.sharepoint.com/%3Aw%3A/r/sites/DHS-OIM/_layouts/15/Doc.aspx?sourcedoc=%7B9BA9CD80-CB42-4F16-BD24-0A064C6B7D0C%7D&file=Reasonable%20Compatibility%20Desk%20Guide.docx&action=default&mobileredirect=true&DefaultItemOpen=1)