**Policy Clarification**

**Medical Assistance – All**

**PMA-20609-376**

**Submitted: 8/16/21** **Agency: CAOs**

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

**Question: If an ex parte review cannot be completed and a renewal packet is sent out, the completed renewal must be returned signed and with all required verifications. If income verification is not returned with the signed 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:

* PH00 recipient – Ex parte renewal cannot be completed because of countable resources so a renewal packet is mailed. Recipient returns completed renewal with resource verification but does not provide proof of Retirement, Survivors, and Disability Insurance (RSDI) income. The RSDI income reported is exactly the same as shown in Exchange 3.
* MG91 recipient – Recipient started a new job prior to the renewal being sent out and quarterly wage information was not available for 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:**  |  |  |
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Exchange information can be used in all of the above scenarios to process the renewal. The information from exchanges, if reasonably compatible, can be used in any instance in which a mailed renewal packet is returned with a signature. The Ex Parte Refresher Training Question & Answer, Ex Parte Review desk guide and Chapter 376 of the handbook will be updated with this information where necessary.

For more information please see:

[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)

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