




Case Manager Alert Descriptions

A description and the icon symbol for each alert is listed below, Alerts are list below in the order they should be worked, from highest priority to lower priority.


-  **Benefit Termination** – When there is active SELG record or the case is pending for a SELG record and the Eligibility Worker authorizes an eligibility change that results in termination of the primary Medical Type of Assistance and/or services Type of Assistance or a transition to OHP-Bridge (BHP or PME), an alert is generated.

This alert is not generated when medical eligibility simply transitions from one TOA to another that is compatible with LTSS, such as OSIPMAD to OSIPMOAA. Please note that depending upon the TOA change, other alerts may be generated.


-  **Pending for Service Eligibility** – When an individual has an ongoing service TOA that is now pending because the current SELG record is ending, an alert will be generated.


-  **Disqualifying Transfer Penalty** – This alert is generated when the individual has any pending or authorized Type of Assistance (TOA) with both of the following:


- Type of assistance or MSERV, NMAGISERV, LTCSERV, or HOPLTCSERV.
- Disqualification Reason of “Transfer of Resources”


-  **Liability Change** -- This alert is generated when one of the following occurs:


- A patient liability record is created
- An existing patient liability amount is updated (including from a non-zero to \$0)
- This alert does not generate when medical benefits are terminated.


-  **Medical TOA Transition** – When there is active service eligibility data (SELG) on file in ONE and the eligibility worker authorizes an eligibility change that transitions the recipient from MAGI medical to non-MAGI medical, and vice versa, an alert will be generated. (e.g., MSERV to LTCSERV or ADLT to OSIPMOAA)

-  **Incompatible TOA** – An alert will be generated when there is active SELG data on file in ONE, an eligibility determination resulting in a change in TOA is authorized, and if the change in TOA is causing one of the following:
 - An existing recurring Medical Related Payment (MRP), authorized as part of the eligibility determination or through the Other Payments module, is not compatible with the newly authorized TOA.
 - A future effective one-time MRP is not compatible with the newly authorized TOA

-  **Change in Address/Living Situation** -- An alert will be generated when there is an active SELG record on file in ONE and address data and/or living situation data is changed as follows:
 - Change in Individual's Physical Address – This includes address data that is newly added, updated, or deleted. Please note this is a change to the individual physical address, only.
 - Change in individual's Living Arrangement – This includes living arrangement data that is newly added, updated, or deleted.
 - NOTE - This alert generates when address/living arrangement is changed (Save/Next button in data collection). If these changes also result in eligibility changes, then other alerts may also generate at authorization. For example, when an individual moves from an in-home to a community-based care setting and the patient liability changes, the patient liability and change in address/living situation alerts will be generated.

-  **Medical Renewal** – When an individual is receiving medical benefits and has an active SELG record in ONE, an alert will be generated when Financial Eligibility is due for renewal.

-  **Missed Appointment** – When an individual has missed an appointment for any program and a future appointment has not been scheduled, an alert will be generated. This alert will only be generated for cases that are currently pending for an RFI or up for renewal. This alert will be displayed in the Missed Appointment alert column and the icon will be black.

-  **Pending Case** – When an individual has a case pending due to a Medical RFI, an alert will be generated.

This document was created by [APD Medicaid Financial Eligibility Training](#). Please contact us with any questions or clarification needs.