

APD Q&A

Service Eligibility

April 22, 2021



After today's session, you should be able to answer the following questions:

What is a Service TOA?

How do I view the Service TOA?

How is the Service TOA created?

How do I view service eligibility in MMIS?

What else do I need to know about LTCSERV?

Related to service eligibility, what information is important to communicate?

Reviewing payment authorizations/payment issues and other troubleshooting tips will be covered in a future session

Service TOAs in ONE

Answering question: What is a Service TOA?

The Three Service TOAs in ONE

MSERV

NMAGISERV

LTCSERV

Oregonians receiving LTSS (SPL 1-13) or who are on SPPC will have one of these TOAs. These service TOAs allow payment authorizations to service providers. Let's find out what each one means.

Service TOAs in ONE

Answering question: What is a Service TOA?

MSERV

- This service TOA is seen when an Oregonian is receiving MAGI medical.
- This is considered a “companion” TOA, meaning it needs a MAGI TOA as well. In the ONE system, the ADLT TOA is commonly seen with the MSERV TOA.

Service TOAs in ONE

Answering question: What is a Service TOA?

NMAGISERV

- This service TOA is seen when an Oregonian is receiving OSIPM medical.
- This is also considered a “companion” TOA. In this case, it needs an OSIPM TOA. One of the more common OSIPM TOAs is SSIR (which is when an Oregonian receives SSI). However, there are several other examples.

Service TOAs in ONE

Answering question: What is a Service TOA?

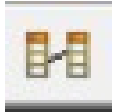
LTCSEVR

- This service TOA is also a medical TOA for OSIPM.
- This TOA is for the Oregonian who qualifies for OSIPM medical benefits under the 300% SSI requirement.
- This TOA requires the Oregonian to be both service and financially eligible.

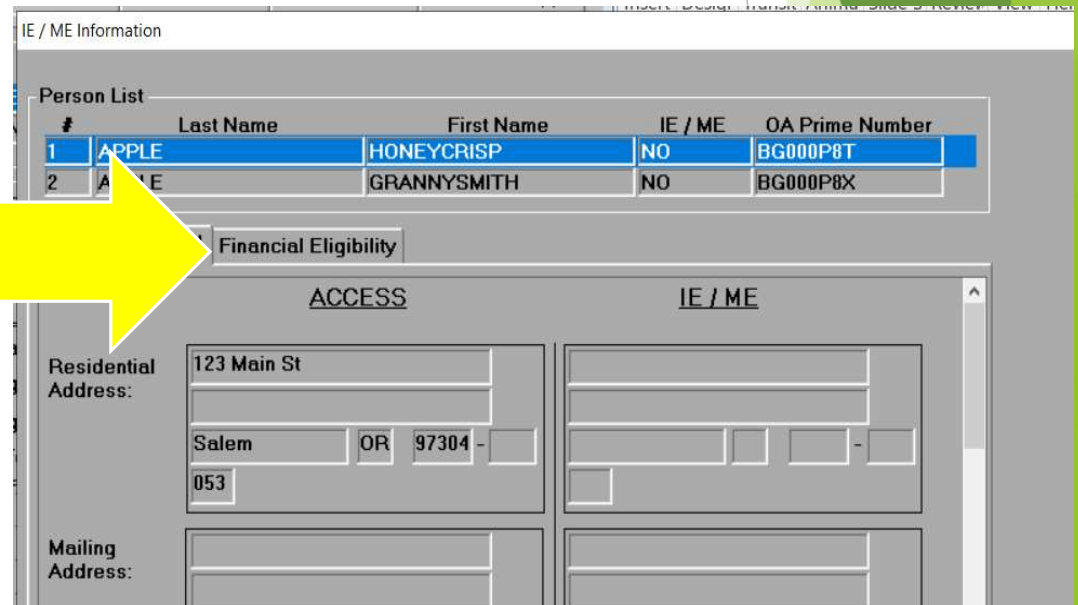
Service TOAs in ONE

Answering question: How do I view the service TOA?

Here's how to view to service TOA in Oregon ACCESS:

- ▶ The screen will appear when navigating to the case via a Person or Case search.
- ▶ Otherwise, click on the  icon or click on “view”, “case”, then “IE info.”

Click on the “Financial Eligibility” tab



#	Last Name	First Name	IE / ME	OA Prime Number
1	APPLE	HONEYCRISP	NO	BG000P8T
2	APPLE	GRANNYSMITH	NO	BG000P8X

Financial Eligibility

ACCESS IE / ME

Residential Address: 123 Main St
Salem OR 97304 -
053

Mailing Address:

Service TOAs in ONE

Answering question: How do I view the service TOA?

The financial eligibility tab includes the following:

- The names of the Oregonians in the household;
- The benefits currently or recently authorized for the specific Oregonian under review;
- The IE/ME case number (referenced in the ONE system);
- The start/renewal date and end date of the benefit.

The screenshot displays the ONE system interface. At the top, there is a 'Person List' table with columns for '#', 'Last Name', 'First Name', 'IE / ME', and 'OA Prime Number'. Below this, there are two tabs: 'IE / ME Download' and 'Financial Eligibility'. The 'Financial Eligibility' tab is active, showing a table with columns for 'Type of Assistance', 'IE / ME Case Number', 'Start Date', and 'End Date'. The table contains three rows of data.

Type of Assistance	IE / ME Case Number	Start Date	End Date
Qualified Medicare Beneficiary - Basic		11/1/2020	12/31/9999
SNAP		11/1/2020	12/31/9999
OSIPM with Services		11/1/2020	12/31/9999

Service TOAs in ONE

Answering question: How do I view the service TOA?

Here are the most common descriptions in OA and what they mean:

Type of Assistance*

OSIPM with Services (LTCSERV or NMAGISERV)

OHP Plus with Services (MSERV)

OHP Plus Adult (ADLT)

SNAP

Qualified Medicare Beneficiary**

OSIPM-SSI (SSIR)

Definition

LTC services and OSIPM Medicaid

LTC services and MAGI Medicaid

MAGI Medicaid

SNAP benefits

QMB assistance (paying Medicare premium)

OSIPM due to SSI eligibility

For OPI: Individuals with any Types of Assistance that include OSIPM or MAGI are not eligible for OPI.

*The information in parenthesis is the actual TOA

**There are different levels of assistance with this program, however this training does not go into this level of detail.



Service TOAs in ONE

Answering question: How do I view the service TOA?

- ▶ Here is how to view the TOA in the ONE system:
 - ▶ Click on **Quick Search** then use the menu to search for the specific Oregonian. The easiest way to search is by either using the prime number or the case number. The case number can be found by viewing the IE information in OA.
 - ▶ When the search result displays, click on the case number link.



Search Results

Your search returned 1 result

< Prev **1** Next >

Individual #	Name	Preferred Name	Person #	Prime #	Date Of Birth	SSN	Case/ Application #	Source	HOH
804							401		

Service TOAs in ONE

Answering question: How do I view the service TOA?

- ▶ Under the section **Currently Associated EDGs** clicking the arrow will show the currently authorized TOAs. If you need to see the historical authorizations, click on **View Authorization History**.
- ▶ Here is what it looks like when you want to see the currently authorized TOAs:

Authorized EDGs						
EDG Name	Category of Assistance	Benefit Period	Eligibility Result	Edg Status	Authorization Date	Renewal Date
	LTCSErv	04/01/2021 - Ongoing	Pass	Approved	03/12/2021	07/31/2021
	QMBP	04/01/2021 - Ongoing	Pass	Approved	03/12/2021	07/31/2021

Service TOAs in ONE

Answering question: How do I view the service TOA?

- ▶ When you need to view the historical TOA authorizations, you may identify specific search parameters to narrow the search results. Here is an example:

The screenshot shows the 'Search Criteria' section of the ONE system. The search parameters are: Begin Date: 11/30/2020, End Date: 02/28/2021, Program: Medical, Authorization Status: Authorized, and Individual: (empty). A 'Search' button is located below the criteria. The results are displayed in a table with the following columns: EDG #, Category of Assistance, Name, Begin Date, End Date, BSS NF/PW, EDG Status, Auth Status, Auth Date, and Details. The table contains three rows of results, all for the category 'LTCSEV' and 'QM8P'. Each row includes links for 'Notice Reason', 'RFI Details-N/A', 'Financial Summary', 'Patient Liability Summary', 'View Disqualification - N/A', and 'Other Evaluated TOA's - N/A'.

EDG #	Category of Assistance	Name	Begin Date	End Date	BSS NF/PW	EDG Status	Auth Status	Auth Date	Details
	LTCSEV		12/01/2020	12/31/2020	N/A N/A	Approved	Authorized	11/22/2020	Notice Reason RFI Details-N/A Financial Summary Patient Liability Summary View Disqualification - N/A Other Evaluated TOA's - N/A
	LTCSEV		01/01/2021	01/31/2021	N/A N/A	Approved	Authorized	12/07/2020	Notice Reason RFI Details-N/A Financial Summary Patient Liability Summary View Disqualification - N/A Other Evaluated TOA's - N/A
	QM8P		12/01/2020	12/31/2020	N/A N/A	Approved	Authorized	11/22/2020	Notice Reason RFI Details-N/A Financial Summary Patient Liability Summary

Service TOAs in ONE

Answering question: How is the service TOA created?

- ▶ For Oregonians served by APD, the service TOA is generated in Oregon ACCESS by approving a benefit.

Service Category/Benefit	Begin Date	End Date	Status
APD-Residential	04/01/2021	04/03/2022	Approved
APD-Residential	05/01/2020	03/31/2021	Ended

The chart below indicates whether the benefit is OSIPM or MAGI compatible:

LTCSEV or NMAGISERV (OSIPM)	MAGISERV (MAGI)
APD-In Home	KPS-In Home
APD-Residential	KPS-Residential
APD-SPH	KPS-SPH
ICP	NFC (all variations)
NFC (all variations)	PAC
PAC	BPO
BPA (only for NMAGISERV)	

Service TOAs in ONE

Answering question: How is the service TOA created?

Oregon Project Independence (OPI)

- ▶ A service TOA is not created for Oregonians receiving services through OPI.
- ▶ Oregonians may only be eligible for OPI if they are not eligible for OSIPM or MAGI.
 - ▶ It is important for staff to confirm that the Oregonian does not have an OSIPM or MAGI medical TOA prior to approval for OPI services
- ▶ Oregonians receiving services through OPI, who are not receiving any other benefits (such as SNAP or the Medicare Savings Program) will not have an active case in ONE.

Service TOAs in ONE

Answering question: How is the service TOA created?

- ▶ After the benefit is approved in Oregon ACCESS, the information is sent over to the SELG screen in the mainframe. Here is a comparison of the approved benefit in Oregon ACCESS and what it looks like in SELG:

Service Category/Benefit	Begin Date	End Date	Status	Ben Act
APD-Residential	04/01/2021	04/03/2022	Approved	
APD-Residential	05/01/2020	03/31/2021	Ended	



```
SELG CAPS and Non-CAPS Service Eligibility Query
Prime # _____ Recip:
Sel Beg Date End Date Svc Svc Ben Lst Update Racf Id Cor Branch IE Source
- 04/01/2021 04/03/2022 APD RES 03/12/2021 Y CAPS
- 05/01/2020 03/31/2021 APD RES 03/12/2021 Y CAPS
```

Service TOAs in ONE

Answering question: How is the service TOA created?

- ▶ The SELG record is sent to both MMIS and the ONE system. This information is utilized by all our payment systems for provider authorizations and payment.
- ▶ The example below shows how the SELG record turns into a service TOA (assuming the case is in Approved status):

```

SELG          CAPS and Non-CAPS Service Eligibility Query
Prime # _____ Recip:
Sel  Beg Date  End Date  Svc  Svc  Ben  Lst Update  Racf Id  Cor  Branch  IE  Source
-    04/01/2021 04/03/2022 APD  RES  -    03/12/2021  -      -    -      Y   CAPS
-    05/01/2020 03/31/2021 APD  RES  -    03/12/2021  -      -    -      Y   CAPS
    
```

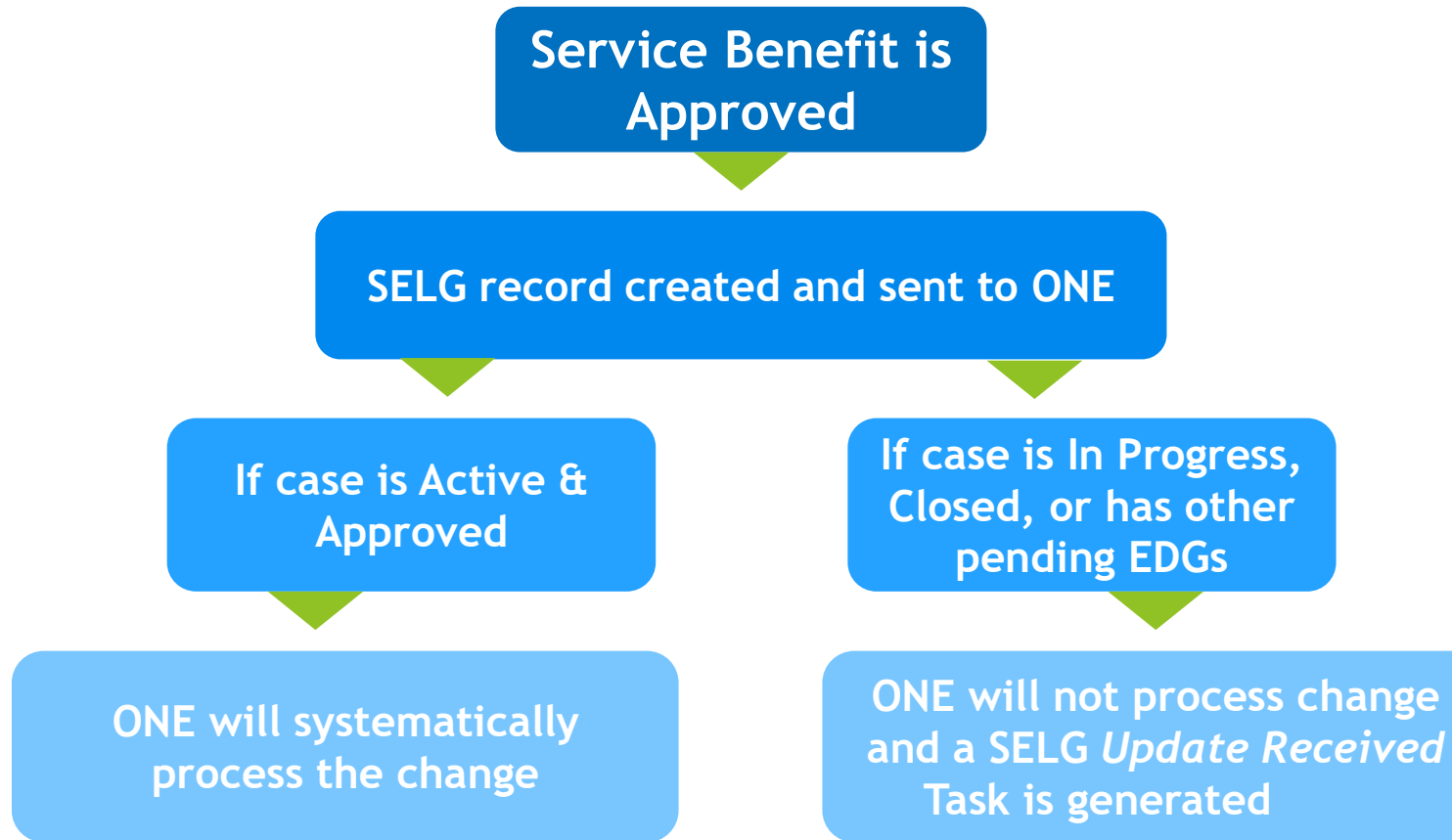


EDG Name	Category of Assistance	Benefit Period	Eligibility Result	Edg Status	Authorization Date	Renewal Date
	LTCSERV	04/01/2021 - Ongoing	Pass	Approved	03/12/2021	07/31/2021

* Reminder: LTCSERV will not be generated unless the Oregonian is also financially eligible

Service TOAs in ONE

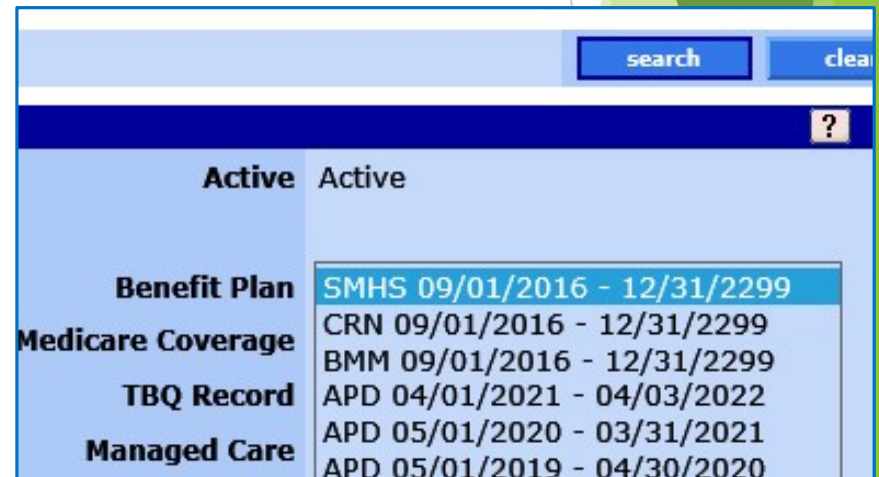
Answering question: How is the service TOA created?



Service TOAs in ONE

Answering question: How do I view service eligibility in MMIS?

- ▶ Complete a Recipient Search in MMIS
- ▶ On the right-hand side, view the “Benefit Plan” dropdown.
- ▶ The following are APD service eligibility benefits:
 - ▶ APD In-home or CBC (OSIPM)
 - ▶ KPS In-home or CBC (MAGI)
 - ▶ BPA (State Plan Personal Care - OSIPM)
 - ▶ BPO (State Plan Personal Care - MAGI)
 - ▶ NFC (Nursing Facility setting, OSIPM or MAGI)
 - ▶ PAC (PACE benefit)



The screenshot shows a software interface with a search bar at the top right containing the words "search" and "clear". Below the search bar is a dark blue header bar with a white question mark icon on the right. The main content area has a light blue background and contains a table with two columns. The first column lists categories, and the second column lists specific benefit plans with their effective dates. A dropdown menu is open for the "Benefit Plan" category, showing a list of options.

Active	Active
Benefit Plan	SMHS 09/01/2016 - 12/31/2299
Medicare Coverage	CRN 09/01/2016 - 12/31/2299
	BMM 09/01/2016 - 12/31/2299
TBQ Record	APD 04/01/2021 - 04/03/2022
Managed Care	APD 05/01/2020 - 03/31/2021
	APD 05/01/2019 - 04/30/2020

Service TOAs in ONE

Answering question: What else do I need to know about the LTCSERV TOA?

LTCSERV

Intake:

- ▶ As previously mentioned, the LTCSERV TOA requires eligibility for both services and financial.
- ▶ For services, this means an approved SELG benefit must be established within 45 days, otherwise the case will be denied.
- ▶ When financial eligibility is approved, pending the service eligibility approval, the TOA will look like this:

LTCSERV	[Redacted]	10/01/2020	10/31/2020	N/A	N/A	Pend	Notice Reason
							RFI Details-N/A
							Financial Summary
							Patient Liability Summary
							View Disqualification - N/A
							Other Evaluated TOA's - N/A

Service TOAs in ONE

Answering question: What else do I need to know about the LTCSERV TOA?

LTCSERV

Ongoing:

- ▶ LTCSERV needs a continuing SELG benefit for the TOA to be valid.
- ▶ If the SELG benefit expires (i.e., the benefit in Oregon ACCESS ended in correlation with a need for a new service assessment), the LTCSERV benefit will end.
- ▶ Right now (during the COVID emergency), the ONE system will change the TOA to a stand-alone medical TOA.
 - ▶ If this occurs, once a new benefit has been approved, medical eligibility must be run in ONE for the LTCSERV TOA to be authorized.

Service TOAs in ONE

Answering question: Related to service eligibility, what information is important to communicate?

Case managers should communicate any change of address or setting change:

- ▶ When used to determine Patient Liability, ONE takes the status directly from SELG record
- ▶ In the ONE system, it is referred to as “Living Arrangement”. The status must be accurate for eligibility factors.
- ▶ Living Arrangement is specifically important when trying to evaluate for Acute Care.

Service TOAs in ONE

Answering question: Related to service eligibility, what information is important to communicate?

Here are some other changes case managers should communicate:

- ▶ Births or when an Oregonian passes away
- ▶ Medical deduction or income/SSI changes
- ▶ Eligibility needs to be re-ran for payment troubleshooting



Service TOAs in ONE

Answering question: Related to service eligibility, what information is important to communicate?

Here are some changes Financial Eligibility staff should communicate:

- ▶ Any change in medical eligibility*
- ▶ Change of address
- ▶ Incompatible TOAs
- ▶ Oregonian passes away
- ▶ Change in liability amount

**During the COVID-19 emergency, the medical benefit will not be closed; however, any potential Medicaid status changes should still be communicated*

What questions do you have?

Please type your questions into the broadcast text box and our moderator will ask the panel

Session	Date
Payment Systems	04/29/2021
DQ's, RA's, and ICT's	05/06/2021
Medical Deductions & Liability	05/13/2021
Forms, Notices & Reports	05/20/2021
Medical Related Payments (MRP's)	05/27/2021
Renewals in ONE	06/03/2021
Wrap up: Review & Open Q&A	06/10/2021

APD/AAA LTC & ONE Q&A Series