

# **DMA ADMINISTRATIVE LETTER NO: 14-03, ADDENDUM 5, APPLICATIONS FOR MQB-E AND CERTIFICATION PERIOD EXTENSION TO 9/30/2003**

**DATE:** March 21, 2003

**SUBJECT:** Applications for MQB-E and Certification Period  
Extension to 9/30/2003

**DISTRIBUTION:** County Directors of Social Services  
Medicaid Eligibility Staff

## **I. BACKGROUND**

The Balanced Budget Act of 1997 established a mandatory eligibility group of low income Medicare beneficiaries. The funding for this group, the Qualifying Individuals (QI1/MQB-E), was based on a fixed allocation at 100% Federal Financial Participation (ffp) through December 2002.

Congress passed a budget for the Federal Fiscal Year 2003. QI1/MQB-E is funded through September 2003. When Congress takes action at a later date regarding the possible extension of the QI1 program past September 2003, we will issue subsequent administrative letters regarding what will happen with the MQB-E program.

## **II. PROCEDURES FOR EXTENDING CERTIFICATION PERIOD TO 9/30/2003**

EIS automatically will extend the certification through date for MQB-E cases to September 30, 2003. This update will occur the night of March 25, 2003. A list of the cases that are updated will be available the next day in a report on XPTR. The XPTR name is "DHREJ QI1 Cert Period Extended". Select the version dated 3/25/2003 to view this list.

MQB-E cases with an 8125 pending the day the certification period extension runs will not be included in the automatic update. Also, MQB-E cases that do not have a certification through date of 4/30/2003 will not be updated. These cases will require manual update of the certification period if the case remains active MQB-E. DMA will notify counties of cases requiring manual updates.

### **III. MEDICAID CLASSIFICATION CHANGES AND PROGRAM TRANSFERS TO MQB-E**

[DMA Administrative Letter No. 14-03, Addendum 4](#) dated March 3, 2003, notified you to allow Medicaid classification changes and program transfers of eligible individuals to MQB-E. Beginning Wednesday, March 26, 2003, begin entering a certification through date of 9/30/2003 for changes and transfers to MQB-E.

### **IV. APPLICATIONS FOR MQB-E**

The Centers for Medicare and Medicaid Services (CMS) has notified DMA that applications can be taken for MQB-E.

Beginning March 26, 2003, you may register and dispose MQB-E applications. [DMA Administrative Letter 14-03, Addendum 1, MQB-E \(Q11\) Program Changes for January 2003](#) required each county to keep a tracking list of individuals to contact regarding Q11 if the program continued. Instructions are now included for what to do with the MQB-E tracking list.

#### **A. Individuals on the MQB-E Tracking List With Denied MAABD or MQB Applications**

By April 30, 2003, key a DSS-8124 for MQB-E for each individual on the MQB-E tracking list who:

1. Applied for MAABD or MQB-Q and was denied, or
2. Was terminated MAABD or MQB-Q.

Do not require these individuals to come in or sign another application form. The date of application will be the day you key the 8124 into EIS.

Document on the MQB-E Tracking List that a DSS-8124 was keyed and the date it was keyed.

#### **B. Other Individuals on MQB-E Tracking List**

1. Mailing Applications

By April 11, 2003, send all the other individuals on your tracking list the attached MQB-E application form. DMA modified the DMA-5060, MQB-E Reenrollment Form, ([see attached](#)) to be used as an application form for these individuals. Include on each application form the county name and mailing address and the applicant's name and mailing address.

Include with the enrollment form the [DMA-5061](#) Rights and Responsibility Notice and a return envelope. If window envelopes are used for mailing and/or return envelope, ensure that the county name and address display in the window for mailing and the applicant's name and address display in the window for return. Document on the MQB-E Tracking List the date the application form was mailed to each individual.

2. Applications Returned by the Post Office

Follow procedures in [MA-2352 III.A.5](#) (Terminations/Deletions – Unable to Locate). If a new address is obtained, mail the application form to the new address. Document on the MQB-E Tracking List the new address and when the form was remailed to the individual.

If a new address is not obtained, clearly document all attempts to locate the individual and attach the documentation to the application form and file in the individual's case record. Document the MQB-E tracking log "unable to locate" and the county case record number where the documentation is filed.

3. Application Not Received

If the county never receives the application, no further action is required.

4. Application Received

Train mailroom staff to recognize QI1/MQB-E applications so they can be date-stamped and forwarded to an assigned unit for processing. The date of application is the date that a complete application is received in the agency. Always date stamp the date the application and any other information is received.

All applications must be:

- a. Entered on a log. Adapt [DMA-5066, Log for NC Health Choice/Medicaid Mail-In Applications](#) for tracking the receipt of MQB-E applications.
- b. Screened to determine if they are complete.
- c. Returned to the individual if it is determined that the application is incomplete.

5. Screening the Application

All mail-in applications must be screened for completeness. Faxed applications are not acceptable. A complete application is one that meets the following criteria.

- a. The information is legible.
- b. The application is submitted to the correct county of residence based upon the address provided.
- c. The application is signed.

When the application is complete, key the DSS-8124.

6. Incomplete Applications

If the application is incomplete take the following actions within one workday.

- a. If the application is incomplete because it is missing information, return it to the individual along with a cover letter indicating that the form is incomplete and noting what information is needed. You can adapt [MA-3207 Figure 2](#) to use as a cover letter. You may choose to contact the individual by phone for the missing information. In this situation, the date of application is the date the MQB-E application form is first received in the agency.
- b. If the application is incomplete only because it is received in the wrong county, call the correct county of residence and explain that the individual was on your MQB-E tracking list and that the individual has moved to the new county. Obtain the name and address of the income maintenance supervisor in the correct county to forward the application.

Copy the application form and document on the application form the telephone contact with the correct county. Attach the copy of the application to the MQB-E Tracking List. Document the MQB-E Tracking List with the date the original application is sent to the correct county.

- c. If the application is incomplete because it is missing information and is received in the wrong county, return it to the individual along with a cover letter indicating that the form is incomplete. Inform him of the information that is needed and of the correct county address for the county department of social services.

- d. If the application is incomplete because it is completely illegible, treat the application as an inquiry. Refer to [MA-2301, Conducting A Face-to-Face Intake Interview](#), for inquiry instructions.
7. Information included on the application indicates that the individual(s) should apply for Medicaid under the Aged, Blind, or Disabled program:
    - a. Within one workday of receipt of the application, send a letter scheduling an appointment to complete an application. Instruct him to contact the agency by phone if he has any questions. Refer to MA-2300, Initial Contact.
    - b. Explain that a mail-in application is not allowed under the adult categories and the individual must complete a face-to-face interview.
    - c. Include in the explanation the time frames for requesting retroactive assistance.
    - d. Document the record that the applicant was advised to apply for MAABD.
    - e. The date of the Aged, Blind, and Disabled Medicaid application is the date the face-to-face interview takes place.

### **C. Processing Application Forms**

For all applications on the MQB-E tracking list verify income and resources.

#### **1. Resources**

Verify resources for the month of application. If countable resources are below the MQB-E limit, applicant meets the resource limit for ongoing coverage and for the 3 months of retroactive coverage based on the date of application.

If the individual's countable resources are over the resource limit for the month of application, do not authorize retroactive coverage for any of the three retroactive months. Exception: If you have verification that the countable resources for a retroactive month(s) were under the resource limit, you may authorize coverage for that month(s).

#### **2. Income**

Verify income for ongoing coverage and for each retroactive month. Disregard the RSDI cost-of-living allowance (COLA) for January, February, and March 2003. Begin counting the full RSDI amount, including the 2003 COLA effective April 1, 2003. See [Adult Medicaid Manual Change Notice No. 19-03, Poverty Level Income Limits](#).

Retroactive coverage is not allowed prior to 1/1/2003 for applications dated in 2003.  
When approving ongoing MQB-E, enter a certification through date of 9/30/2003.

If you have questions, please contact your Medicaid Program Representative.

Nina M. Yeager  
Director

[This material was researched and prepared by Mary Spivey, EIS Consultant, Eligibility  
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