<u>Attachment 3</u>
(10/14/2010)
MEDICARE SAVINGS PROGRAM APPLICATION FROM SOCIAL SECURITY
APPLICATION PROCESSING IN KAECSES

(1) <u>Applicants not known or with an inactive medical program in KAECSES</u>

CLIR (Client Inquiry/Registration Menu) – Completion of this screen is <u>mandatory</u>. Register an MS program type (with a QO or LO subtype). The receipt date is the application date. The SSA application date is the proration date. Both spouses shall be registered – the applicant shall be the case head. An automatic TPQY request is sent upon registration.

ADDR (Address) – Completion of this screen is <u>mandatory</u>. Enter the address and telephone number reported on the application.

INDA (Interview Data) – Completion of this screen is <u>optional</u>. The interview will default to "E" for exempt.

SEPA (Setup Participation) – Completion of this screen is <u>mandatory</u>. The applicant shall be coded "IN". The spouse shall be coded either "IN" (Medicare beneficiary) or "DI" (not a Medicare beneficiary).

MEIN (Medicare Information) – Completion of this screen is <u>mandatory</u>. The Medicare information should auto populate this screen from the EATSS system upon registration (this is a multiple day process).

MERE (Medical Resources) – Completion of this screen is <u>mandatory</u>. The medical subtype is either "AD" (Disabled) or "OA" (Aged). Enter an "N" in the Insurance Code field.

SSDO (SSN/Date of Birth/Sex) – Completion of this screen is <u>mandatory</u>. Enter the SSN, date of birth and sex for the applicant and spouse from the information reported on the application. If the applicant is deceased, enter the date of death from the application.

ETRC (Ethnicity/Residency/Citizenship/Identity) – Completion of this screen is <u>mandatory</u>. For an applicant or spouse previously unknown to KAECSES, enter Race as "O", Ethnicity as "N", Language Spoken as "UN", Language Written as "UN", Other Media as "N", Citizenship as "US" and Identity as "Y".

MAST (Marital Status) – Completion of this screen is optional. The screen shall be completed at review.

SPRD (Specified Relative/Deprivation/Child Support) – Skip this screen entirely – inapplicable.

CHSE (Child Support Enforcement Referral) – Skip this screen entirely – inapplicable.

LIRE (Liquid Resources) – Completion of this screen is optional. These resources shall be verified and entered at review.

VEHI (Vehicles) – Completion of this screen is optional. These resources shall be verified and entered at review.

OTAP (Other Assets/Property) – Completion of this screen is optional. These resources shall be verified and entered at review.

MSRD (MS Resource Determination) – Completion of this screen is mandatory.

UNIN (Unearned Income) – Completion of this screen is mandatory if unearned income is reported. Enter the income reported on the application. The SSA income for each spouse must be verified and entered separately. All other unearned income shall be entered by the applicant.

PICK (Pickle) – Completion of this screen is mandatory. If QMB eligible, a "QO" code shall be entered in the SMI field for the first 4 months of the year (if necessary). If LMB eligible, an "LO" code shall be entered in the SMI field. If Expanded LMB eligible, an "LL" code shall be entered in the SMI field. After the PICK screen has been updated, the MSID and SPEN (with PEN entered) screens must be processed to authorize eligibility.

EAIN (Earned Income) – Completion of this screen is mandatory if earned income is reported. The yearly amount reported on the application must be manually annualized by dividing by 12. Enter the monthly income for each spouse.

SEEI (Self Employment/Intermittent Income) - Completion of this screen is mandatory if self employment income is reported. The yearly amount reported on the application must be annualized by dividing by 12. Enter the monthly amount for each spouse.

EXNS (Expense/Need Standard) – Skip this screen entirely – inapplicable.

MSID (MS Income Determination) – Completion of this screen is <u>mandatory</u>.

SPEN (Spenddown) – Completion of this screen is <u>mandatory</u>. Enter PEN to authorize and set a 12 month review period.

MEEX (Medical Expenses) – <u>Skip</u> this screen entirely – inapplicable.

LOTC (Long Term Care) – <u>Skip</u> this screen entirely – inapplicable.

MSED (MS Eligibility Determination) – <u>Skip</u> this screen entirely – inapplicable for an approval.

NORE (Notice Request) – Completion of this screen is <u>mandatory</u>. Based on the applicable program approved, one of the following approval notices shall be sent – N160 (QMB Approval – MIPPA), N161 (LMB Approval – MIPPA) or N162 (Expanded LMB Approval – MIPPA).

(2) <u>Applicants with an active program (other than medical) in KAECSES</u>

CLIM (Client Inquiry) – Completion of this screen is <u>mandatory</u>. Inquire on the applicant to find the active program case number.

APMA (Application Maintenance) – Completion of this screen is <u>mandatory</u>. Register an MS program type (with a QO or LO subtype). The receipt date is the application date. The SSA application date is the proration date. Both spouses shall be registered – the applicant shall be the case head. Send a new TPQY request for the applicant and spouse if a current TPQY does not exist in EATSS.

ADDR (Address) – Completion of this screen is <u>optional</u>. Assume the current address and telephone number listed on the ADDR screen is correct, even if different from the address and/or telephone number reported on the application.

INDA (Interview Data) – Completion of this screen is <u>optional</u>. The interview will default to "E" for exempt.

SEPA (Setup Participation) – Completion of this screen is <u>mandatory</u>. The applicant shall be coded "IN". The spouse shall be coded either "IN" (Medicare beneficiary) or "DI" (not a Medicare beneficiary).

MEIN (Medicare Information) – Completion of this screen is <u>mandatory</u>. The Medicare information should auto populate this screen from the EATSS system upon registration (if there is a current TPQY) or with a new TPQY request (this is a multiple day process).

MERE (Medical Resources) – Completion of this screen is <u>mandatory</u>. The medical subtype is either "AD" (Disabled) or "OA" (Aged). Enter an "N" in the Insurance Code field.

SSDO (SSN/Date of Birth/Sex) – Completion of this screen is <u>mandatory</u>. Enter the SSN, date of birth and sex for the applicant and spouse from the information reported on the application. If the applicant is deceased, enter the date of death from the application.

ETRC (Ethnicity/Residency/Citizenship/Identity) – Completion of this screen is <u>mandatory</u>. For a spouse previously unknown to KAECSES, enter Race as "O", Ethnicity as "N", Language Spoken as "UN", Language Written as "UN", Other Media as "N", Citizenship as "US" and Identity as "Y".

MAST (Marital Status) – Completion of this screen is <u>optional</u>. The screen shall be completed at review.

SPRD (Specified Relative/Deprivation/Child Support) – <u>Skip</u> this screen entirely – inapplicable.

CHSE (Child Support Enforcement Referral) – <u>Skip</u> this screen entirely – inapplicable.

LIRE (Liquid Resources) – Completion of this screen is <u>optional</u>. These resources shall be verified and entered at review.

VEHI (Vehicles) – Completion of this screen is <u>optional</u>. These resources shall be verified and entered at review.

OTAP (Other Assets/Property) – Completion of this screen is <u>optional</u>. These resources shall be verified and entered at review.

MSRD (MS Resource Determination) – Completion of this screen is <u>mandatory</u>.

UNIN (Unearned Income) – Completion of this screen is <u>mandatory</u> if unearned income is reported. Enter the income reported on the application. The SSA income for each spouse must be verified and entered separately. All other unearned income shall be entered by

the applicant.

PICK (Pickle) – Completion of this screen is <u>mandatory</u>. If QMB eligible, a "QO" code shall be entered in the SMI field for the first 4 months of the year (if necessary). If LMB eligible, an "LO" code shall be entered in the SMI field. If Expanded LMB eligible, an "LL" code shall be entered in the SMI field. After the PICK screen has been updated, the MSID and SPEN (with PEN entered) screens must be processed to authorize eligibility.

EAIN (Earned Income) – Completion of this screen is <u>mandatory</u> if earned income is reported. The yearly amount reported on the application must be manually annualized by dividing by 12. Enter the monthly income for each spouse.

SEEI (Self Employment/Intermittent Income) - Completion of this screen is <u>mandatory</u> if self employment income is reported. The yearly amount reported on the application must be annualized by dividing by 12. Enter the monthly amount for each spouse.

EXNS (Expense/Need Standard) – <u>Skip</u> this screen entirely – inapplicable.

MSID (MS Income Determination) – Completion of this screen is <u>mandatory</u>.

SPEN (Spenddown) – Completion of this screen is <u>mandatory</u>. Enter PEN to authorize and set a 12 month review period. The review period may be set to match the review of the other open program.

MEEX (Medical Expenses) – <u>Skip</u> this screen entirely – inapplicable.

LOTC (Long Term Care) – <u>Skip</u> this screen entirely – inapplicable.

MSED (MS Eligibility Determination) – <u>Skip</u> this screen entirely – inapplicable for an approval.

NORE (Notice Request) – Completion of this screen is <u>mandatory</u>. Based on the applicable program approved, one of the following approval notices shall be sent – N160 (QMB Approval – MIPPA), N161 (LMB Approval – MIPPA) or N162 (Expanded LMB Approval – MIPPA).

(3) <u>Applicants with an active medical program in KAECSES</u> – KAECSES processing of MSP applications with an open medical program shall be handled on a case by case basis. Please refer to the MIPPA MSP Application Processing Memo (Policy No: 2010-10-01) for guidance.