

ADW CareConnection© Financial Eligibility First Overview

New ADW Application Process Effective December 1, 2015

Applicants to the Aged and Disabled Waiver program must establish Financial Eligibility before the Pre-Admission Screening (PAS) can be scheduled. Within two business days of receiving a fully completed MNER, APS will send a letter to the applicant notifying them that they must complete financial eligibility before they can proceed with medical eligibility. The letter includes a yellow DHS-2 form and a Case Management Selection form. CareConnection© has been updated to accommodate this process.

- 1. For applicants whose record was created in CareConnection© between 12/1/2015 and 2/19/2016:**
 - CMA providers were notified by Fax if an applicant chose their CMA to help with the financial eligibility process.
 - CMA providers will not have access to these applicant records in CareConnection© during the initial Financial Eligibility period. If an approved member's slot is released and the member chooses a CMA, the chosen CMA will receive notification of the selection following the slot release and selection.
- 2. After close of business on 2/19/2016, updates were made to CareConnection© which allow the system to track the applicant through the initial Financial Eligibility process. For applicants whose record was created in CareConnection© after close of business on 2/19/2016 forward:**
 - If selected by the applicant, CMA providers will receive the Initial **SDM Referral** notification in CareConnection©, which they will accept or reject. APS will no longer fax notification to the CMA. The CMA should contact the applicant and assist them with obtaining financial eligibility for Aged and Disabled Waiver.
 - If the CMA accepts, CMA users will have access to the applicant record in CareConnection©.
 - The CMA will receive the notification **Initial FE Verification**. In the Financial Eligibility screen, the CMA should mark yes/no to indicate whether the applicant is financially eligible per the DHS-2 form. The system will not prompt the CMA user to validate Medicaid number at this time.
 - If received, the CMA must attach the DHS-2 form into CareConnection©

Note: The CMA can research when an applicant was created on the Edit Member/MNER page under the MNER History tab. Look for the first saved record in the Save/Submit Date column.

****The processes below outline the detail of functions related to those applicants whose record was created in CareConnection© after 2/19/2016.****

CMA Accepting or Rejecting Referrals

The applicant may choose a CMA upon applying to the ADW program. The CMA will be notified of the selection in CareConnection© by the **SDM Referral** notification. This feature replaces the faxes agencies previously received to notify them of an applicant's selection prior to February 19, 2016, when CareConnection© was updated to accommodate the new Financial First work flow.

Clicking on the **SDM Referral** Notification will take the CMA user to the Service Delivery Model and Agency Selection page with the member snapshot and SDM selection history. Here the CMA can view all the

information associated with the member's selection of the CMA. From the action column, the CMA user can reject or accept the referral.

- If rejecting the referral, click **Reject Referral** under the action column. From the reject service delivery model referral screen, select a reject reason from the dropdown menu and type any comments into the comment box, then hit submit. This will send a notification to APS and BoSS users notifying them another agency would need to be selected by the member. Upon rejecting a referral, the CMA will have no access to the applicant's record.
- If accepting the referral, click **Accept Referral**. The CMA will be prompted to verify their acceptance then click **OK**. The screen will display a banner indicating the **Service Delivery Model referral has been accepted**. The CMA will then be granted access to the applicant's record in CareConnection©. The CMA should contact the applicant within five business days of accepting the referral by telephone or face-to-face contact. The CMA should offer assistance with applying for financial eligibility and answer any questions the applicant might have.

Note: The applicant cannot select a Service Delivery Model or Homemaker/Personal Attendant agency during this phase of application. They can select a CMA to assist with the initial Financial Eligibility process. If they are later determined medically eligible and are assigned a slot, they will be sent new selection forms where they can choose Personal Options or the Traditional service delivery model and their choice of CMA/HMA at that time.

Entering the Initial Financial Eligibility Verification

The applicant and/or Case Manager must submit the yellow DHS-2 and a copy of the letter from APS Healthcare to the county DHHR so they may determine financial eligibility based on ADW criteria. The yellow DHS-2 includes an expiration date. DHHR will not accept nor process an expired DHS-2. If this occurs, the applicant must reapply.

Medical eligibility determinations will not occur until the "financially approved" yellow DHS-2 form is returned to APS Healthcare. If the yellow DHS-2 form is not returned to the UMC within 60 calendar days of the expiration date, the referral will be closed.

The CMA should indicate Yes/No on the financial eligibility screen to indicate whether the applicant is financially eligible and attach the yellow DHS-2 form to the applicant record in CareConnection©. The user should select Type of Document as **Other** and should label the DHS-2 file they are saving to the system with the file name structure of LastName-DHS-2_YYYYMMDD.

Note: APS cannot proceed with scheduling the medical eligibility assessment until the approved DHS-2 form is available in CareConnection©. Upon receipt of the **Initial FE Entered** notification, APS staff will verify the financial eligibility and attempt to contact the applicant to schedule the PAS. If medically eligible, the applicant will be placed on the managed enrollment list.

CMA Transfers while the applicant is pursuing Initial Financial Eligibility

Note: If a CMA accepts a referral for an applicant, then needs to submit a transfer, the CMA must select only "**Initial FE Verification**" reason when making the transfer so the new CMA will have the notification to enter the financial eligibility verification. Failure to mark this as the reason for transfer of an applicant will result in the new agency not receiving their notification.