



Department of Human Resources
311 West Saratoga Street
Baltimore MD 21201

FIA ACTION TRANSMITTAL

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Issuance Date: March 11, 2014

**TO: DIRECTORS, LOCAL DEPARTMENTS OF SOCIAL SERVICES
DEPUTY/ASSISTANT DIRECTORS FOR FAMILY INVESTMENT
FAMILY INVESTMENT SUPERVISORS AND ELIGIBILITY STAFF
HEALTH OFFICERS, LOCAL HEALTH DEPARTMENTS
LOCAL HEALTH DEPARTMENT ELIGIBILITY STAFF**

**FROM: DEBBIE RUPPERT, EXECUTIVE DIRECTOR, DHMH/OES
ROSEMARY MALONE, EXECUTIVE DIRECTOR, FIA**

Debbie Ruppert
Rosemary Malone

RE: LONG-TERM CARE WITH WAIVER SERVICES

PROGRAM AFFECTED: MEDICAL ASSISTANCE

ORIGINATING OFFICE: OFFICE OF ELIGIBILITY SERVICES

BACKGROUND: This action transmittal addresses applicants who submit initial Medical Assistance (MA) applications to the Eligibility Determinations Division (EDD), {formerly known as the Division of Eligibility and Waiver Services (DEWS)}, requesting LTC and Waiver Services. It also applies to applicants who previously submitted Long-Term Care (LTC) applications to the Bureau of Long-Term Care or the Local Department of Social Services and later apply for Waiver Services within the six (6) month consideration period. In lieu of completing an additional application for Waiver Services, the new OES 014 Intent to Apply for Waiver Services form provides the necessary application date for the Waiver Services application. EDD will accept the OES 014 Intent to Apply for Waiver Services form to begin the Waiver Services application using the information from the DHR/FIA 9709 previously submitted for the MA-LTC application. In some circumstances, EDD may need to request additional information. A new unit has been established at EDD to accept and expedite eligibility **for waiver services only** for LTC applicants.

ACTION REQUIRED: When the OES 014 Intent to Apply for Waiver Services form and the DHR/FIA 9709 are received by EDD, both the LTC and the Waiver Service cases are to be completed by EDD. When the Intent to Apply for Waiver Services form is received by EDD, only the Waiver Services case must be completed by EDD due to the fact that active LTC coverage exists. The following actions are required by the EDD case managers.

I. Eligibility Determinations Division Procedures when the DHR/FIA 9709 and the OES 014 Intent to Apply for Waiver Services form are received:

- The case manager reviews the application and form, obtains all required clearances and requests the necessary verifications
- The case manager reviews the information/verifications, and completes the standard eligibility process for the LTC application in accordance with COMAR within 30 days, using the standard eligibility process
- After the LTC application has been completed on CARES, the case manager processes the OES 014 Intent to Apply for Waiver Services form
- The case manager uses the existing applicant/recipient clearances and verifications from the LTC case to process the waiver case
- When an Authorization to Participate (ATP) in a waiver program is received, the case manager updates CARES with the information provided on the 257 and the ATP to open the Waiver Services program and close the LTC case
- The case manager narrates the closure of the LTC coverage on CARES and specifies which waiver services coverage should be opened
- The case manager completes the necessary forms to update screens 1, 4, and 8 of MMIS as required to assure the appropriate waiver span is placed online for the waiver coverage
- The case manager updates the EDD database and/or the Long-Term Services & Support (LTSS) Secure Access Services tracking system as required for each case record
- The case manager completes the necessary notices based on the application outcome and mails the notices to the applicant, recipient, and the authorized representative as required

II. Eligibility Determinations Division Procedures for when the OES 014 Intent to Apply for Waiver Services form only is received:

- The case manager uses the OES 014 Intent to Apply for Waiver Services form in conjunction with the existing LTC application date on file at the Bureau of Long-Term Care or the Local Department of Social Services if the OES 014 Intent to Apply for Waiver Services form is received by EDD within the six (6) month consideration period of the current LTC application on file
- The case manager reviews the form, obtains all required clearances, and requests the necessary verifications
- The EDD case manager uses the date on the OES 014 Intent to Apply for Waiver Services form as the application date to initiate waiver services
- The case manager requests the LTC case be transferred to the appropriate waiver district office
- The case manager receives the Authorization to Participate (ATP) in a waiver program, updates CARES with the information provided on the 257 and the ATP, opens the Waiver Services program and closes the LTC case
- The case manager narrates the closure of the LTC coverage on CARES and specifies which waiver services coverage should be opened

- The case manager completes the necessary forms to update screens 1, 4, and 8 of MMIS as required to assure the appropriate waiver span is placed online for the waiver coverage
- The case manager updates the EDD database and/or the Long-Term Services & Support (LTSS) Secure Access Services tracking system as required for each case record
- The case manager completes the necessary notices based on the application outcome and mails the notices to the applicant, recipient, and the authorized representative as required

III. Eligibility Determinations Division Procedures when Waiver Services are not approved:

- The case manager transfers the active LTC cases that fail to become eligible for waiver services to the appropriate district office to allow for appropriate case management
- The case manager updates the CARES narration, the EDD database, and the LTSS system with the outcome of the waiver application
- The case manager completes the necessary notices to the applicant, recipient, authorized representative as required

IV. Procedures for Bureau of Long-Term Care or Local Department of Social Services staff who receive LTC/Waiver Applications and OES 014 Intent to Apply for Waiver Services forms:

- If the case manager receives the completed DHR/FIA 9709 and the completed OES 014 Intent to Apply for Waiver Services forms together and the applicant is requesting LTC and Waiver Services at the same time, case manager forwards both forms to the EDD office
- If the case manager receives the completed OES 014 Intent to Apply for Waiver Services form from a requestor with active LTC coverage completed by the Bureau of Long-Term or the Local Department of Social Services, that is within the six (6) month consideration period of the current DHR/FIA 9709 application, case manager forwards the form to the EDD office for waiver processing

INQUIRIES:

Please direct Medical Assistance policy questions the DHMH Division of Eligibility Policy at 410-767-1463 or 1-800-492-5231 (select option 2 and request extension 1463).

cc: DHMH Executive Staff
 DHR Executive Staff
 DHMH Management Staff
 DHR Management Staff
 Constituent Services
 DHR Help Desk