



Medical Eligibility

Eligibility Determination and Benefit
Calculation (EDBC)



Medical Eligibility: EDBC

Introduction

In this course, you will learn how to run Eligibility Determination and Benefit Calculation (EDBC) for medical programs.

After completing this course, you will be able to:

- Explain EDBC
- Understand how a “Rules Engine” relates to EDBC
- Run EDBC
- Review and Verify EDBC
- Override a program configuration
- Create a manual EDBC
- Describe batch eligibility processes





- **Lesson 1: What is EDBC**
- Lesson 2: Run EDBC
- Lesson 3: Review and Verify EDBC
- Lesson 4: Troubleshooting EDBC
- Lesson 5: Overriding EDBC
- Lesson 6: Manual EDBC
- Lesson 7: Batch Eligibility Processes





What is EDBC?

- EDBC = Eligibility Determination and Benefit Calculation
- EDBC is how KEES executes rules to determine eligibility and budget for programs based on regulations
- The EDBC rules engine applies policy
- EDBC Summary can be thought of as a snap shot of eligibility based on what the system knows at a point in time





Medical Eligibility: EDBC

Lesson 1: What is EDBC > Online EDBC

There are five (5) Medical programs available in KEES:

1. Medical
2. Presumptive Eligibility (PE)
3. Presumptive Eligibility Pregnant Women (PE PW)
4. State Supplemental Payment Program (SSPP)
5. AIDS Drug Assistance Program (ADAP)

Only **Medical** utilizes online rules.

Online EDBC means that the eligibility determination is run in KEES using the defined rules engine.

Medical Eligibility: EDBC

Lesson 1: What is EDBC > Online EDBC

Case Name: Jesse Owens
Case Number: 20000779
Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/15/2014 01:00 PM

Case Info Eligibility Services Child Care Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Case Summary

Case Name Jesse Owens	County of Residence Kansas
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- Person Search
- Case Summary
- Contact
- Negative Action
- New P...

02/01/2015

Medical Programs

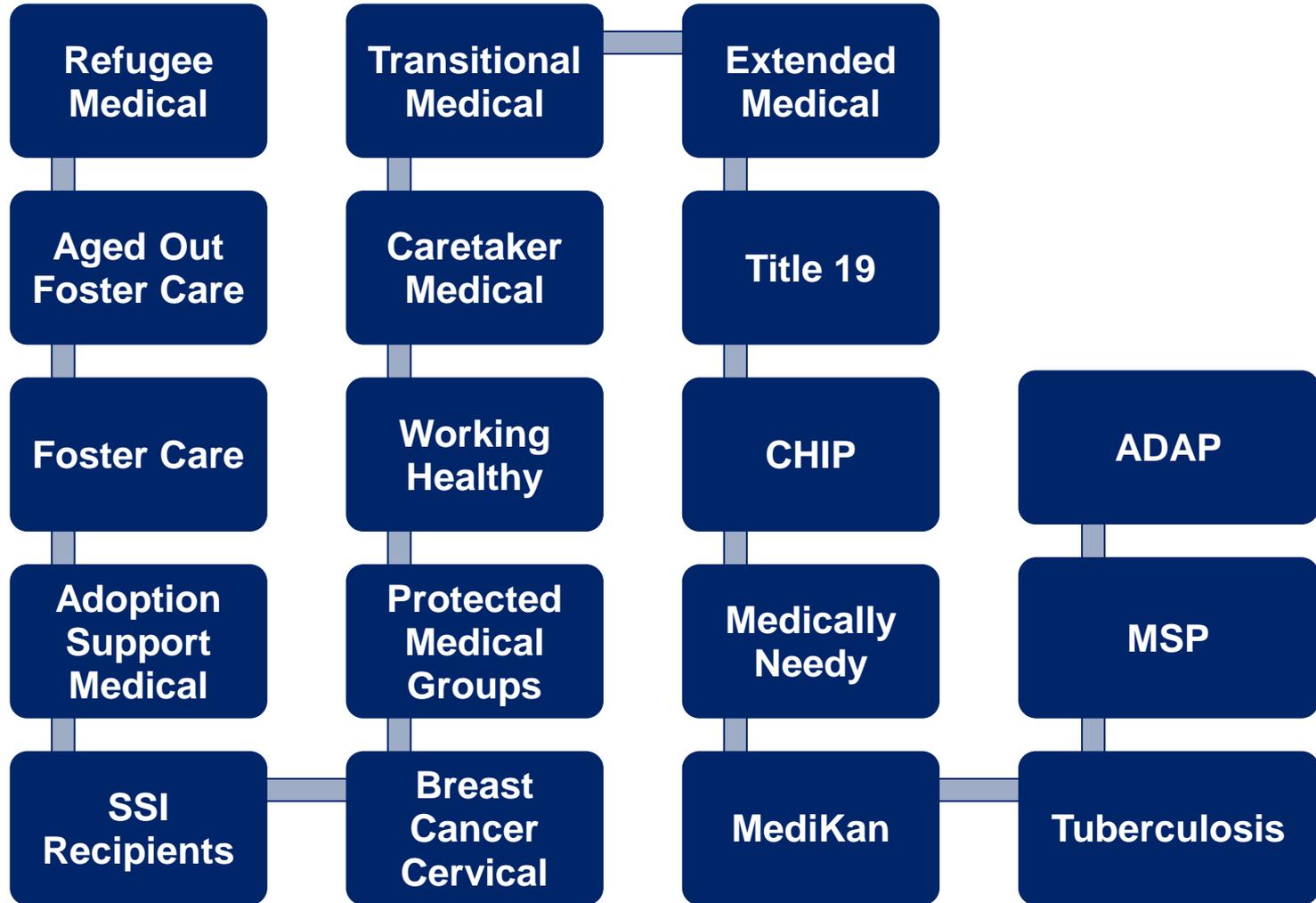
Worker:	Office Num 46 Unit Num G1 User	Primary Applicant/Recipient:	Jesse Owens
Worker ID:	DE4602G100	Language:	English
Program Status:	Pending	Phone Number:	
		Application Date:	12/11/2014

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Jesse Owens	Medical		Primary Applicant	MEM		Pending	

All People Associated with the Case

Medical Eligibility: EDBC

Lesson 1: What is EDBC > Hierarchy





Medical Eligibility: EDBC

Lesson 1: What is EDBC > Hierarchy

Eligible Budgets								
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Title 19	Pass	40%	\$0.00			Gray, Mary	FRI	Parent
						Gray, Edward	FRI	Sibling
						Gray, Christopher	MEM	
				PLN/NB/N/N				
MAGI Title 19	Pass	40%	\$0.00			Gray, Mary	FRI	Parent
						Gray, Edward	MEM	
						Gray, Christopher	FRI	Sibling
				PLN/C2/N/N				
Potential Eligibility								
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI CHIP		40%	\$0.00			Gray, Mary	FRI	Parent
						Gray, Edward	FRI	Sibling
						Gray, Christopher	MEM	
MAGI CHIP		40%	\$0.00			Gray, Mary	FRI	Parent
						Gray, Edward	MEM	
						Gray, Christopher	FRI	Sibling
Failed and Overridden Budgets								
Test	It	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Caretaker Medical		40%	\$0.00			Gray, Mary	MEM	
						Gray, Edward	FRI	Child
						Gray, Christopher	FRI	Child
MAGI Caretaker Medical	Fail	40%	\$0.00			Gray, Mary	FRI	Parent
						Gray, Edward	FRI	Sibling
						Gray, Christopher	MEM	
MAGI Caretaker Medical	Fail	40%	\$0.00			Gray, Mary	FRI	Parent
						Gray, Edward	MEM	
						Gray, Christopher	FRI	Sibling



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Hierarchy

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Long Term Care	Pass	\$2,000.00	<u>\$0.00</u>	Mitchell, Dana L.	\$0.00

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount

MedicalSummary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Adoption Support Medical	Pass	0%	\$0.00	ASM/CH/N/N	HC/HC/SE	Mitchell, Dana L.	MEM	

Potential Eligibility

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Hierarchy

In situations where the consumer could be eligible for more than one program **and** has the option to choose which program they agree to the terms and conditions of (e.g. premium vs. spenddown), there are two solutions for handling this:

- Requested Medical Type (RMT)
- Customer Options



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Requested Medical Types

You can add the 'Requested Medical Type' to be more specific to the type of medical coverage on the **Requested Medicaid Type Detail** page.

EDBC will run apply rules for the requested medical type (i.e. Working Healthy) versus a hierarchy of test categories.

Requested Medical Types:

- Inmate
- LTC (Long Term Care)
- MAGI
- MSP
- Medical
- PPS
- Qualified Disabled Working Individual
- Resource Assessment Only
- Working Healthy



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Requested Medical Types

Requested Medical Type

On the person's Program Detail page a user will select the consumer's **Requested Medical Type**.

Requested Medicaid Type Detail

Save and Return Cancel

Requested Medicaid Type Information

Requested Medicaid Type:*	Begin Month:*	End Month:
<div style="border: 1px solid #ccc; padding: 2px;"> ▼ Medical </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> Inmate * LTC MAGI MSP Medical PPS Qualified Disabled Working Individual Resource Assessment Only Working Healthy </div>	<input type="text" value="12/2014"/>	<input type="text"/>

Save and Return Cancel

The Requested Medical Type can be added or edited after the case has been registered on the Program Person Detail page.



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Requested Medical Types

In the event a child enters a Psychiatric Residential Treatment Facility (PRTF) or requires HCBS services, the **Requested Medical Type** will need to add a LTC RMT.

Requested Medicaid Type Detail

Save and Return Cancel

Requested Medicaid Type Information

<p>Requested Medicaid Type:*</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>PPS</p> <p>Inmate</p> <p style="background-color: #0056b3; color: white; padding: 2px;">LTC</p> <p>MAGI</p> <p>MSP</p> <p>Medical</p> <p>PPS</p> <p>Qualified Disabled Working Individual</p> <p>Resource Assessment Only</p> <p>Working Healthy</p> </div>	<p>Begin Month:*</p> <p>11/2014</p>	<p>End Month:</p>
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Save and Return Cancel

The LTC 'Requested Medical Type' must be set for the entire month in which services are provided.



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Customer Options

Customer Options

This page allows the worker to exclude the consumer from selected programs. Therefore, once EDBC is run, the results would not return those programs in the determination.

Customer Options Detail

[Save and Add Another](#) [Save and Return](#) [Cancel](#)

* - Indicates required fields.

Name: *	- Select -
Type: *	- Select -
Begin Date: *	<input type="text"/>
End Date:	<input type="text"/>

[Save and Add Another](#) [Save and Return](#) [Cancel](#)



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Missing Information

If information is incomplete KEES gives a hard warning that EDBC cannot be run.

- Based on data collection pages
- Must enter any and all information

Run EDBC

EDBC cannot be run because the following information is incomplete:

- **Relationship information is missing for the following persons:**
 - **Shaun Collins**
 - **Sally Collins**

You cannot run EDBC until this information is completed.

Run EDBC

* - Indicates required fields

Benefit Month:*
01/2015 ▾

Program	Status	Timely Notice Exception	Reason	Run Reason
Medical: Citizenship/identity detail record(s) are missing for Mary Pops. EDBC cannot be run for this program.				

Cancel

When one of the above hard warning appears on your screen, you will not be able to run EDBC until this information is complete.

Medical Eligibility: EDBC

Lesson 1: What is EDBC > Missing Information

Some examples of hard warnings if **one or more of the following is missing:**

- Missing relationships for all or some household members
- Missing birth dates for program persons
- No active or pending program in the case for the selected benefit month
- No designated primary applicant/recipient
- No worker assigned





Medical Eligibility: EDBC

Lesson 1: What is EDBC > Missing or Pending Verifications

Verifications are not required to run EDBC. KEES will display a soft warning if verifications are missing/pending.

Benefit Month:*

12/2014 ▾

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	Medical	Pending			<input type="text"/>

Warning! The following verification(s) have not been received:

- **Sophia McKnight**
 - **Liquid Resource**

To run EDBC without these verifications, click on the "Run Edbc w/o Verifications" button.

Run EDBC w/o Verifications

Cancel



Medical Eligibility: EDBC

Lesson 1: What is EDBC > Summary

In Lesson 1: we have learned:

- EDBC stands for Eligibility Determination and Benefit Calculation
- There are five medical programs in KEES
- KEES has a medical hierarchy that determines the best plan
- Adding a RMT will only apply the rules for that RMT
- The difference between a 'hard' warning to a 'soft' warning





- Lesson 1: What is EDBC
- **Lesson 2: Run EDBC**
- Lesson 3: Review and Verify EDBC
- Lesson 4: Troubleshooting EDBC
- Lesson 4: Overriding EDBC
- Lesson 5: Manual EDBC
- Lesson 6: Batch eligibility processes





Medical Eligibility: EDBC

Lesson 2: How to Run EDBC > Running EDBC

The **Run EDBC** page allows you to run eligibility determination and benefit calculation for programs in which a consumer is applying or participating.

Case Name: Johnny Silva
Case Number: 5006426

Journal Tasks Reminders Logout Help

Contact Log User : user user

Case Info Eligibility Services Child Care Resource Databank Fiscal Special Units Reports Document Control Admin Tools

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number Request ID Go

Person Search

- Non Financial
- Financial
 - Batch Interfaces
 - Verifications
 - EBT Account List
 - Run EDBC
 - Manual EDBC
 - Needs
 - Service Arrangements
 - EDBC Results

Run EDBC

* - Indicates required fields

Benefit Month: 06/2013

Program	Status	Timely Notice Exception	Reason	Run Reason
Medical	Pending			

Run EDBC Cancel



Medical Eligibility: EDBC

Lesson 2: How to Run EDBC > Running EDBC

The **Benefit Month** drop-down box will default to the application month. However, you can change the benefit month by selecting the month from the **Benefit Month** drop-down box. If you change the benefit month, the **Run EDBC** page will then be refreshed with programs pending or active for that month.

Benefit Month:*

12/2014 ▾
01/2015
12/2014

Program	Status	Timely Notice Exception	Reason	Run Reason
<input type="checkbox"/> Medical	Pending			<input type="text"/>

Select the **Program(s)** by clicking the check box next to the program. You can select ALL programs to run at the same time by clicking the check box next to the program title, if applicable.

Benefit Month:*

12/2014 ▾

Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/> Medical	Pending			<input type="text"/>



Medical Eligibility: EDBC

Lesson 2: Run EDBC > Running EDBC

By selecting a run reason from the **Run Reason** drop-down box, a user may indicate why EDBC is being run. It is not necessary to indicate a run reason at initial application.

Run EDBC

Run EDBC Cancel

* - Indicates required fields

Benefit Month:*
05/2013 ▾

<input checked="" type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	Medical	Pending			▾

Run EDBC Cancel

Run Reason:

- CE Reset
- CSRA Reassessment
- No Touch
- Review - No Touch
- Review Processing
- Spenddown



Medical Eligibility: EDBC

Lesson 2: Run EDBC > Run Reasons

What do these Run Reasons mean/do?

CE (Continuous Eligibility) Reset

This run reason is used to allow negative changes to a case and changes the CE period or review and the type of medical coverage provided.

CSRA Reassessment

If you need to re-determine the Community Spouse Resource Allowance (CSRA) calculation after you have already run EDBC which was Saved and Accepted. Or when you want a new “Assessment Only” and a recalculation, the user will need to change the RMT to “Assessment Only” and run EDBC with this Run Reason.

No Touch

This run reason is used when a MAGI/ Non-MAGI determination was attempted through the original EDBC run and wasn't successful.



Medical Eligibility: EDBC

Lesson 2: Run EDBC > Run Reasons

Review – No Touch

It's a combined functions of the Review Processing and No Touch service run reasons. It will create a “Read Only” EDBC, establishes a type of review and only Passive and Super Passive reviews will be authorized.

Review Processing

This will update the status of RE documents (if sent through KEES) and establish a new review period for the medical program on the Case Summary page. This run reason is used when running EDBC in response to returned review in order to extend the review period and mark the Review & IR status to ‘Complete’.

Spenddown

This run reason is used when a consumer already has a spenddown and you need to establish a new base period prior to the review.

Medical Eligibility: EDBC

Lesson 2: Run EDBC > EDBC List

Once EDBC is run, the page refreshes with the **EDBC List** page.

Let's take a look at the column headings on this page.

EDBC List

Cancel

Display by:

Program:

Type Reason:

From:

To:

View

Search Results Summary

Results 1 - 1 of 1

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
12/2014		Medical	Regular	Not Accepted	Details	01/08/2015	Online EDBC Rules

Cancel

Medical Eligibility: EDBC

Lesson 2: Run EDBC > EDBC List

EDBC List

Cancel

Display by:

Program:

Type Reason:

From:

To:

View

Search Results Summary

Results 1 - 1 of 1

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
12/2014		Medical	Regular	Not Accepted	Details	01/08/2015	Online EDBC Rules

Cancel

Begin Month: Benefit month

End Month: Will display if budgeted for one month

Program Name: Medical (specific program information will be provided on the Summary page)

EDBC Type: Read Only or Regular



Medical Eligibility: EDBC

Lesson 2: Run EDBC > EDBC List

The **Run Status** column provides you with the status of the EDBC. When you initially run EDBC and the EDBC List page is displayed, the run status will display as “Not Accepted”.

Other EDBC statuses include:

- Accepted - Not Saved
- Accepted – Saved

EDBC List

Cancel

Display by:

Program:

Type Reason:

From:

To:

View

Search Results Summary

Results 1 - 1 of 1

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
12/2014		Medical	Regular	Not Accepted	Details	01/08/2015	Online EDBC Rules

Cancel



Medical Eligibility: EDBC

Lesson 2: Run EDBC > EDBC List

Auth Amount: Medical will read 'Details' or 'Fail' when a determination has been completed.

Date Run: Date EDBC is run

EDBC List

Cancel

Display by:

Program:

Type Reason:

From:

To:

View

Search Results Summary Results 1 - 1 of 1

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
12/2014		<u>Medical</u>	Regular	Not Accepted	Details	01/08/2015	Online EDBC Rules

Cancel

EDBC Source: Conversion, Batch EDBC Rules, Manual, Online EDBC Rules, Overridden, or Special Program Pages



Medical Eligibility: EDBC

Lesson 2: Run EDBC > Timely Notice Exception

There will be times when a worker will need to use the Timely Notice Exception.

This will most often occur when the user will need to re-run EDBC for a paid month where Long Term Care either starts or stops.

Run EDBC

Run EDBC Cancel

* - Indicates required fields

Benefit Month:*

01/2015

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	Medical	Active	Yes		

Run EDBC Cancel

Reason drop-down options include:

- Best Plan-By-Pass
- LTC Late Change
- Mass Change (SNAP only)
- Stop Aid Paid Pending
- Waiver On File



Medical Eligibility: EDBC

Lesson 2: Run EDBC > Summary

In Lesson 2 we learned:

- Steps in running EDBC
- How to read the EDBC List page
- Run Reasons available to use on the Run EDBC page
- Timely Notice Exception Reasons



- Lesson 1: What is EDBC
- Lesson 2: Run EDBC
- **Lesson 3: Review and Verify EDBC**
- Lesson 4: Troubleshooting EDBC
- Lesson 4: Overriding EDBC
- Lesson 5: Manual EDBC
- Lesson 6: Batch eligibility processes





Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

In this lesson, we will access, review and verify the EDBC results for our consumer. The following components of our **Medical EDBC Summary** will be reviewed:

- Program Configuration
- Reporting Configuration
- Resource Determination
- Income
- Household Size
- Deductions
- Aid Codes





Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Medicaid EDBC Summary

[Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2014		01/09/2015	Not Accepted	Dana George

EDBC Information

Type:
Regular

Program Configuration

System Determination
 EDBC Source: Online EDBC Rules
 Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
Gill, Allan	06/15/1952	MEM		Active		N

[Override Program Configuration](#)

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Medically Needy	Pass	\$2,000.00	\$1,400.00	Gill, Allan	\$1,400.00

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount

MedicalSummary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Medically Needy	Pass	0%	\$0.00	MDN/DS/N/N		Gill, Allan	MEM	

Potential Eligibility

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

[Override Medical Summary](#)

[Accept](#) [Cancel](#)

Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Medicaid EDBC Summary

[Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
03/2015		01/23/2015	Not Accepted	Dana George

EDBC Information

Type:
Regular

Program Configuration

System Determination

EDBC Source: Online EDBC Rules
Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
Mitchell, Rita R.	08/25/2000	MEM		Active		N

[Override Program Configuration](#)

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
------	--------	----------------	----------------	--------	-------------------

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount
------------------	----------------	------------------	-----------------------------	--------	-------------------

Medical Summary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Foster Care Medical	Pass	0%	\$0.00	FCM/DC/N/N		Mitchell, Rita R.	MEM	

Potential Eligibility

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

[Override Medical Summary](#)

[Accept](#) [Cancel](#)

Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Medicaid EDBC Summary Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2014		01/09/2015	Not Accepted	Dana George

E DBC Information

Type: Regular

Program Configuration

System Determination
EDBC Source: Online EDBC Rules
Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
McKnight, Sophia	03/18/1984	MEM		Active		N
McKnight, Michael	01/19/1982	MEM		Active		N
McKnight, Christopher	06/27/2010	MEM		Active		N
McKnight, Sarah	10/05/2014	MEM		Active		N

[Override Program Configuration](#)

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
CSRA Determination					
Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount

Medical Summary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Caretaker Medical	Pass	33%	\$0.00	CTM/CH/N/N		McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	MEM	
						McKnight, Sarah	FRI	Sibling
MAGI Caretaker Medical	Pass	33%	\$0.00	CTM/CH/N/N		McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	FRI	Sibling
						McKnight, Sarah	MEM	
MAGI Caretaker Medical	Pass	33%	\$0.00	CTM/PA/N/N		McKnight, Sophia	FRI	Spouse
						McKnight, Michael	MEM	
						McKnight, Christopher	FRI	Child
						McKnight, Sarah	FRI	Child
SSI Recipients	Pass	0%	\$0.00	SSI/DS/N/N		McKnight, Sarah	MEM	

Potential Eligibility

Premium/LTC Liability/Spenddown: \$0.00
Members Tested: Sarah

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

[Override Medical Summary](#)

Accept Cancel



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

The top section of the **Medicaid EDBC Summary** displays:

- The range of benefit months that the EDBC encompasses
- The date EDBC was run
- The run status

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2014		01/09/2015	Not Accepted	Dana George
EDBC Information				
Type:				
Regular				

- The Worker who ran and accepted the EDBC
- The EDBC type will be either **'Read Only'** or **'Regular'**



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Medicaid EDBC Summary

[Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2014		01/09/2015	Not Accepted	Dana George

EDBC Information
Type: Regular

Program Configuration														
System Determination EDBC Source: Online EDBC Rules Program Status: Active														
Note: Overridden rows are in bold.														
<table border="1"> <thead> <tr> <th>Name</th> <th>DOB</th> <th>Role</th> <th>Role Reason</th> <th>Status</th> <th>Status Reason</th> <th>QHP Screened</th> </tr> </thead> <tbody> <tr> <td>Gill, Allan</td> <td>06/15/1952</td> <td>MEM</td> <td></td> <td>Active</td> <td></td> <td>N</td> </tr> </tbody> </table>	Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened	Gill, Allan	06/15/1952	MEM		Active		N
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Override Program Configuration														

Reporting Configuration												
Resource Test												
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Medically Needy	Pass	\$2,000.00	\$1,400.00	Gill, Allan	\$1,400.00							

CSRA Determination												
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Medical Summary																		
Note: Overridden rows are in bold.																		
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<table border="1"> <thead> <tr> <th>Test</th> <th>Result</th> <th>FPL %</th> <th>Premium/LTC Liability/Spenddown</th> <th>Aid Code</th> <th>LTC Details</th> <th>Members Tested</th> <th>Role</th> <th>Role Reason</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason									
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason										



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

In the **Program Configuration** section, you can view the EDBC Source, Program Status, and, if applicable, the Program Status Reason.

Program Configuration
System Determination
EDBC Source: Online EDBC Rules
Program Status: Active
Note: Overridden rows are in bold.

Program Configuration
System Determination
EDBC Source: Online EDBC Rules
Program Status: Denied
Program Status Reason: No Eligible Mem
Note: Overridden rows are in bold.
Name DOB Pol



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

EDBC Source: This is the source from which eligibility was determined.

EDBC Sources include:

- Online EDBC Rules
- Batch EDBC Rules
- Manual



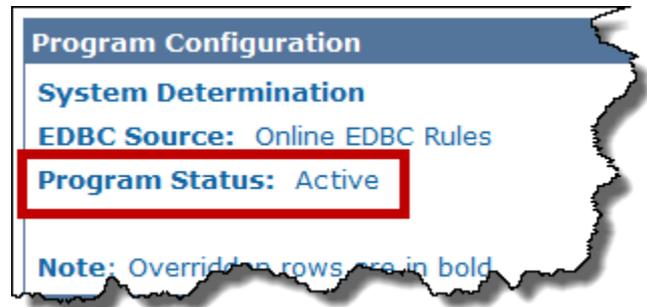


Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Program Status: The overall status of the program can include:

- Active
- Denied
- Discontinued



Program Person

This section will also list the program members.

Program Configuration						
System Determination						
EDBC Source: Online EDBC Rules						
Program Status: Active						
Note: Overridden rows are in bold.						
Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
<u>McKnight, Sophia</u>	03/18/1984	MEM		Active		N
<u>McKnight, Michael</u>	01/19/1982	FRI	No Linkage to MA	Active		Y
<u>McKnight, Christopher</u>	06/27/2010	MEM		Active		N
<u>McKnight, Sarah</u>	10/05/2014	MEM		Active		N

[Override Program Configuration](#)

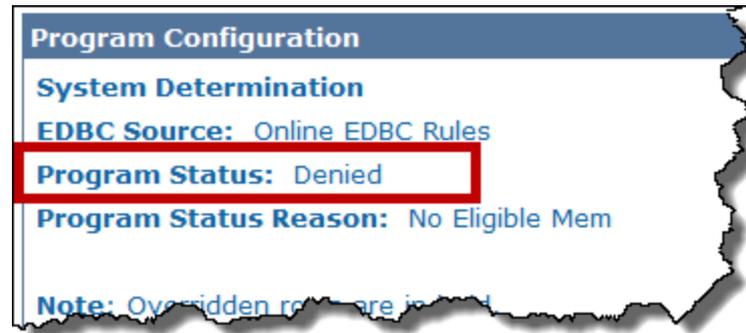


Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Program Status: The overall status of the program can include:

- Active
- Denied
- Discontinued



Program Status Reason will display if there is a determination of 'Denied' or 'Discontinued' EDBC. Some examples include:

- No Eligible Member
- Over Resources
- Whereabouts Unknown
- No Linkage to MC





Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Program Configuration

System Determination
EDBC Source: Online EDBC Rules
Program Status: Denied
Program Status Reason: No Eligible Mem

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
Owens, Jesse	06/17/1935	FRI	No Linkage to MA	Denied	Doesn't Meet Program Req.	Y

[Override Program Configuration](#)

Program Person

This section will list the program members and their vital information.

- Date of birth
- Role
- Role Reason
- Status
- Status Reason



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Individual Eligibility Criteria Close

Name:
Sophia McKnight

Gross Income		
Type	Program Display Type	Amount
SSI	Family Medical	\$750.00

Resource		
Type	Ownership	Value
Residential Property	50.0%	\$65,000.00
Bank Account/Cash	100.0%	\$750.00

Expense	
Type	Cost
Prescriptions	\$159.00

▼ Non-Financial Eligibility

Request Medical Type Medicaid

The user can select the member's name hyperlink in the program configuration block to access the **Individual Eligibility Criteria** page. This page displays every income, expense, and resource, regardless of type and possible exemptions. Selecting the **Close** button will return the user to the **Medicaid EDBC Summary** page.



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Medicaid EDBC Summary

[Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2014		01/09/2015	Not Accepted	Dana George

EDBC Information
Type: Regular

Program Configuration														
System Determination														
EDBC Source: Online EDBC Rules														
Program Status: Active														
Note: Overridden rows are in bold.														
<table border="1"> <thead> <tr> <th>Name</th> <th>DOB</th> <th>Role</th> <th>Role Reason</th> <th>Status</th> <th>Status Reason</th> <th>QHP Screened</th> </tr> </thead> <tbody> <tr> <td>Gill, Allan</td> <td>06/15/1952</td> <td>MEM</td> <td></td> <td>Active</td> <td></td> <td>N</td> </tr> </tbody> </table>	Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened	Gill, Allan	06/15/1952	MEM		Active		N
Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened								
Gill, Allan	06/15/1952	MEM		Active		N								
Override Program Configuration														

Reporting Configuration												
Resource Test												
<table border="1"> <thead> <tr> <th>Test</th> <th>Result</th> <th>Resource Limit</th> <th>Resource Total</th> <th>Person</th> <th>Individual Amount</th> </tr> </thead> <tbody> <tr> <td>Medically Needy</td> <td>Pass</td> <td>\$2,000.00</td> <td>\$1,400.00</td> <td>Gill, Allan</td> <td>\$1,400.00</td> </tr> </tbody> </table>	Test	Result	Resource Limit	Resource Total	Person	Individual Amount	Medically Needy	Pass	\$2,000.00	\$1,400.00	Gill, Allan	\$1,400.00
Test	Result	Resource Limit	Resource Total	Person	Individual Amount							
Medically Needy	Pass	\$2,000.00	\$1,400.00	Gill, Allan	\$1,400.00							

CSRA Determination												
<table border="1"> <thead> <tr> <th>Assessment Month</th> <th>Resource Total</th> <th>1/2 of Resources</th> <th>Resource Allowance Standard</th> <th>Person</th> <th>Individual Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount						
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MedicalSummary																		
Note: Overridden rows are in bold.																		
Eligible Budgets																		
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Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason										



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

▼ Reporting Configuration					
Name	Adult/Child	Aged 65 or Older	Receives Medicare	Declared Disability	Active Disability
McKnight, Christopher	Child	No	No	No	No
McKnight, Sarah	Child	No	No	No	No
McKnight, Sophia	Adult	No	No	No	Yes

Reporting Configuration

The program persons and their **Adult/Child** code will be listed in this section.





Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

▶ Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Medically Needy	Pass	\$2,000.00	<u>\$1,400.00</u>	Gill, Allan	\$1,400.00

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount
------------------	----------------	------------------	-----------------------------	--------	-------------------

MedicalSummary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Medically Needy	Pass	0%	\$0.00	MDN/DS/N/N		Gill, Allan	MEM	

Potential Eligibility

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Override Medical Summary

Accept Cancel



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Resource Test					
Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Medically Needy	Pass	\$2,000.00	\$1,400.00	Gill, Allan	\$1,400.00

After selecting the **Resource Total** hyperlink on the **Medicaid EDBC Summary** page, the user will access the **Property Detail** page. Selecting **Close** will return the user to the **Medicaid EDBC Summary** page.

Property Detail

Close

Owner	Property Type	Ownership	Value	Countable Amount
Gill, Allan	Bank Account/Cash	100.0%	\$1,400.00	\$1,400.00
Bradley, Isabel	Car	100.0%	\$500.00	\$0.00
			Total	\$1,400.00

Close



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

▶ Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Medically Needy	Pass	\$2,000.00	<u>\$1,400.00</u>	Gill, Allan	\$1,400.00

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount
------------------	----------------	------------------	-----------------------------	--------	-------------------

MedicalSummary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Medically Needy	Pass	0%	\$0.00	MDN/DS/N/N		Gill, Allan	MEM	

Potential Eligibility

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Override Medical Summary

Accept Cancel



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Medicaid EDBC Summary

[Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2014		01/30/2015	Not Accepted	Dana George

EDBC Information

Type: Read Only Type Reason: Assessment Only

Program Configuration

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Low Income	Fail	\$2,000.00	\$4,552.00	Owens, Jesse Owens, Belinda	\$28,000.00 \$0.00

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount
09/2014	\$28000.00	\$14000.00	\$23448.00	Owens Jesse Owens Belinda	\$28000.00 \$0.00

Medical Summary

Note: Overridden rows are in bold.

No Data Found

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Medically Needy	Fail	127%	\$1,338.00		IC/NF/SN	Owens, Jesse	MEM	

[Override Medical Summary](#)

[Accept](#) [Cancel](#)



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Medically Needy	Pass	\$2,000.00	\$1,400.00	Gill, Allan	\$1,400.00

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount
------------------	----------------	------------------	-----------------------------	--------	-------------------

MedicalSummary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Medically Needy	Pass	0%	\$0.00	MDN/DS/N/N		Gill, Allan	MEM	

Potential Eligibility

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Override Medical Summary

Accept Cancel

Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

MedicalSummary									
Note: Overridden rows are in bold.									
Eligible Budgets									
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason	
MAGI Title 19	Pass	35%	\$0.00			McKnight, Sophia	FRI	Parent	
						McKnight, Michael	FRI	Parent	
				PLN/C2/N/N		McKnight, Christopher	MEM		
						McKnight, Christopher	FRI	Sibling	
				PLN/NB/N/N		McKnight, Sarah	MEM		
SSI Recipients	Pass	0%	\$0.00	SSI/DS/N/N		McKnight, Sophia	MEM		
Potential Eligibility									
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason	
MAGI CHIP		35%	\$0.00			McKnight, Sophia	FRI	Parent	
						Sarah			
Failed and Overridden Budgets									
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason	
MAGI Caretaker Medical	Fail	35%	\$0.00			McKnight, Sophia	FRI	Parent	
						McKnight, Michael	FRI	Parent	
						McKnight, Christopher	MEM		
						McKnight, Christopher	FRI		
						Sarah			
MAGI Caretaker Medical	Fail	35%	\$0.00			McKnight, Sophia	FRI	Spouse	
						McKnight, Michael	MEM		
						McKnight, Christopher	FRI	Child	
						McKnight, Sarah	FRI	Child	
<input type="button" value="Override Medical Summary"/>									
<input type="button" value="Accept"/> <input type="button" value="Cancel"/>									



Medical Eligibility: EDBC

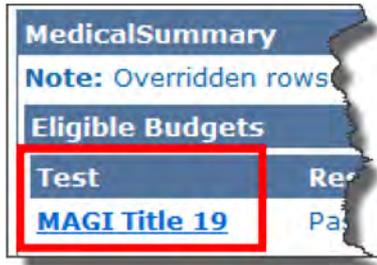
Lesson 3: Review and Verify EDBC Results

MedicalSummary								
Note: Overridden rows are in bold.								
Eligible Budgets								
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Title 19	Pass	35%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
				PLN/C2/N/N		McKnight, Christopher	MEM	
						McKnight, Sarah	FRI	Sibling
MAGI Title 19	Pass	35%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	FRI	Sibling
				PLN/NB/N/N		McKnight, Sarah	MEM	
SSI Recipients	Pass	0%	\$0.00	SSI/DS/N/N		McKnight, Sophia	MEM	
Potential Eligibility								
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI CHIP		35%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	MEM	
						McKnight, Sarah	FRI	Sibling



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results



Click the **Test** category hyperlink to access the **Income Determination** page. This page shows how much income was counted for that person.

The **Income Determination** page shows:

- Income used
- Deductions allowed
- Income Allocations
- Protected Income Limit

Income Determination		
Unearned Income	\$	<u>100.00</u>
Unearned Income Deductions	-	<u>0.00</u>
Net Unearned Income	=	100.00
Earned Income	\$	<u>800.00</u>
Earned Income Deductions	-	<u>0.00</u>
Net Earned Income	=	800.00
\$20 Unearned/Earned Income Deduction	-	<u>0.00</u>
Allocation and Other Deductions	-	<u>0.00</u>
Total Countable Income	=	900.00
Budget Unit Size		4
Protected Income Limit	\$	<u>2,963.00</u>
Income Result		Pass

Close



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Income Determination		
Unearned Income	\$	100.00
Unearned Income Deductions	-	0.00
Net Unearned Income	=	100.00
Earned Income	\$	800.00
Earned Income Deductions	-	0.00
Net Earned Income	=	800.00
\$20 Unearned/Earned Income Deduction	-	0.00
Allocation and Other Deductions	-	0.00
Total Countable Income	=	900.00
Budget Unit Size		4
Protected Income Limit	\$	2,963.00
Income Result		Pass

Close

Selecting the hyperlinks in the **Income Determination** page will navigate the user to the detail page for that line item.

Name	Type	Description	Amount
McKnight, Michael	Seasonal Employment		\$ 800.00
Total			\$ 800.00

Close



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Potential Eligibility								
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI CHIP		40%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	MEM	
						McKnight, Sarah	FRI	Sibling
MAGI CHIP		40%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	FRI	Sibling
						McKnight, Sarah	MEM	
Failed and Overridden Budgets								



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Failed and Overridden Budgets								
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Caretaker Medical	Fail	40%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	MEM	
						McKnight, Sarah	FRI	Sibling
MAGI Caretaker Medical	Fail	40%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	FRI	Sibling
						McKnight, Sarah	MEM	
MAGI Caretaker Medical	Fail	40%	\$0.00			McKnight, Sophia	FRI	Spouse
						McKnight, Michael	MEM	
						McKnight, Christopher	FRI	Child
						McKnight, Sarah	FRI	Child

[Override Medical Summary](#)



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Failed and Overridden Budgets								
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Caretaker Medical	Fail	40%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight, Michael	FRI	Parent
						McKnight, Christopher	MEM	
						McKnight, Sarah	FRI	Sibling
MAGI Caretaker Medical	Fail	40%	\$0.00			McKnight, Sophia	FRI	Parent
						McKnight,	FRI	Parent

Click the **Test** category hyperlink to access the **Income Determination** page. This page shows how much income was counted for that person.

Income Determination	
Unearned Income	\$ 100.00
Unearned Income Deductions	- 0.00
Net Unearned Income	= 100.00
Earned Income	\$ 800.00
Earned Income Deductions	- 0.00
Net Earned Income	= 800.00
\$20 Unearned/Earned Income Deduction	- 0.00
Allocation and Other Deductions	- 0.00
Total Countable Income	= 900.00
Budget Unit Size	4
Protected Income Limit	\$ 756.00
Income Result	Fail

Close



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Medically Needy	Pass	\$2,000.00	\$1,400.00	Gill, Allan	\$1,400.00

CSRA Determination

Assessment Month	Resource Total	1/2 of Resources	Resource Allowance Standard	Person	Individual Amount
------------------	----------------	------------------	-----------------------------	--------	-------------------

Medical Summary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
Medically Needy	Pass	0%	\$0.00	MDN/DS/N/N		Gill, Allan	MEM	

Potential Eligibility

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
No Data Found								

Override Medical Summary

Accept

Cancel



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

At the bottom of the **Medical EDBC Summary** page is the **Overpayments/Underpayments** section.

Overpayments/Underpayments		
Type	Category	Amount

This section will not display results at initial application.

An overpayment is a result of a shift in eligibility or a change in spenddown amount when EDBC is recalculated for a paid month.



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Reviewing **EDBC** is a simple but a very important function in KEES.

EDBC can be:

- Accepted
 - if the eligibility determinations are correct
- Overridden
 - for specific situations when rules are not used
- Cancelled
 - if the eligibility determination or the benefit calculation is not correct





Medical Eligibility: EDBC

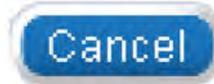
Lesson 3: Review and Verify EDBC Results

Once you have reviewed EDBC, you can either:

- Accept the EDBC by clicking the **Accept** button



OR



- By clicking the **Cancel** button the user returns to the **EDBC List** page.

These buttons are made available to you at the top and bottom of every **Medicaid EDBC Summary** page.



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
06/2013		Medical	Regular	Not Accepted	Details	06/24/2013	Online EDBC Rules

[Cancel](#)



Once EDBC results are accepted, the status is updated to Accepted – Not Saved and a **Save and Continue** button appears.

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
06/2013		Medical	Regular	Accepted - Not Saved	Details	06/24/2013	Online EDBC Rules

[Save and Continue](#) [Cancel](#)



Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results

Clicking the **Save and Continue** button generates a **Notice of Action (NOA)**. You can locate this NOA on the **Distributed Documents Search** page. If a notice is not generated a user will need to create a form.

A NOA will generate after saving an EDBC at initial application or when there is change in benefits.





Medical Eligibility: EDBC

Lesson 3: Review and Verify EDBC Results > Summary

In this lesson, we learned:

- EDBC List page
- Medical EDBC Summary
 - Program Configuration
 - Passed Budgets
 - Failed and Overridden Budgets
 - Accept or Cancel Results
 - Notifications





- Lesson 1: What is EDBC
- Lesson 2: Run EDBC
- Lesson 3: Review and Verify EDBC
- **Lesson 4: Troubleshooting EDBC**
- Lesson 5: Overriding EDBC
- Lesson 6: Manual EDBC
- Lesson 7: Batch eligibility processes





Medical Eligibility: EDBC

Lesson 4: Troubleshooting EDBC

Verify & Accept

If results are incorrect, you must determine why.

Troubleshoot

Check all information has been entered accurately on data collection pages.



Medical Eligibility: EDBC

Lesson 4: Troubleshooting EDBC

Medicaid EDBC Summary

[Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2014		01/09/2015	Not Accepted	Dana George

EDBC Information

Type:
Regular

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Program Status: Denied

Program Status Reason: No Eligible Mem

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
Owens, Jesse	06/17/1935	FRI	No Linkage to MA	Denied	Doesn't Meet Program Req.	Y

[Override Program Configuration](#)



Medical Eligibility: EDBC

Lesson 4: Troubleshooting EDBC

Program Configuration

System Determination
 EDBC Source: Online EDBC Rules
 Program Status: Denied
 Program Status Reason: No Eligible Mem

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
Owens, Jesse	06/17/1935	FRI	No Linkage to MA	Denied	Doesn't Meet Program Req.	Y

[Override Program Configuration](#)

Reporting Configuration

Resource Test

Test	Result	Resource Limit	Resource Total	Person	Individual Amount
Long Term Care	Pass	\$2,000.00	\$0.00	Owens, Jesse	\$0.00
				Owens, Belinda	\$0.00



Medical Eligibility: EDBC

Lesson 4: Troubleshooting EDBC

Individual Eligibility Criteria

Close

Name:

Jesse Owens

Gross Income		
Type	Program Display Type	Amount
Social Security	Elderly and Disabled	\$1,400.00
Non-Financial Eligibility		
Age: 79	Requested Medical Type: LTC	
The Person's Disability Type: SSA Disabled	Citizenship/Refugee Status: Assumed Citizen	
Eligibility Criteria	Eligible	
The person has SOBRA Other Program Assistance	No	
The person was in Foster Care on their 18th birthday	No	
The person has Care and Control of a child	No	
The person has other health insurance	No	
The person has ended other health insurance within 8 month	No	
The person is pregnant	No	
The person was receiving aid in 3 of the last 6 months	No	
The person met the Pickle-DAC screening question	No	
The person met the Pickle Widow/Widower screening questions	No	
The person met the Pickle Early Widow/Widower screening questions	No	
The person is paying FICA or SECA taxes	No	
The person is in a Long Term Care Living Arrangement	No	
The person is working at least 40 hours	No	
The person receives SSI Income	No	
The person is severely delinquent on paying a premium	No	



Medical Eligibility: EDBC

Lesson 4: Troubleshooting EDBC

Program Configuration

System Determination
EDBC Source: Online EDBC Rules
Program Status: Denied
Program Status Reason: No Eligible Mem

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
Pops, Mary	04/20/1947	FRI	Pending SSN Verif	Denied	Doesn't Meet Program Req.	Y

[Override Program Configuration](#)

Role Reason	Solution
State Residence	Check Contact Summary page which includes the Address Detail page. Make sure the begin date reflects the first day of the month benefits begin. Check Residency List page and the Residency Detail page
Pending SSN Verif	Check the Individual Demographics page.
Applicant is a citizen or non-citizen	Information is not entered correctly on the Individual Demographics Detail page and/or Citizenship/Identity or Non-Citizenship Detail page.



Medical Eligibility: EDBC

Lesson 4: Troubleshooting EDBC

Important items to look for when Income or Resources affect benefit determinations.

- A budget wasn't created at the time EDBC was run.
- Begin dates must be entered as the 1st day of the Month regardless of when the application was received.

Medical Eligibility: EDBC

Lesson 4: Troubleshooting EDBC > Summary

- It is important to verify all information on the data collection pages is accurate.
- Ensure the begin dates are correct.
- If KEES has not been updated with new regulations, override the EDBC results.





- Lesson 1: What is EDBC
- Lesson 2: Run EDBC
- Lesson 3: Review and Verify EDBC
- Lesson 4: Troubleshooting EDBC
- **Lesson 5: Overriding EDBC**
- Lesson 6: Manual EDBC
- Lesson 7: Batch eligibility processes





Medical Eligibility: EDBC

Lesson 5: Overriding EDBC > Program Configuration

Overriding:

- Changing the eligibility determination.
- Determining eligibility outside of KEES rules.

Program Configuration:

- Determination based on regulations in KEES rules.
- Override if determination was incorrect, for reasons other than data entry errors.

Program Configuration

System Determination
EDBC Source: Online EDBC Rules
Program Status: Ineligible
Program Status Reason: No Eligible Mem

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Collins, Shaun	11/04/1954	FRI	No Linkage to MA	Ineligible	

[Override Program Configuration](#)



Medical Eligibility: EDBC

Lesson 5: Overriding EDBC > Program Configuration

EDBC Override Reasons include:

- Administrative Decision
- Conversion
- Hearing Decision
- Manual EDBC Program
- New Policy Regulation Change
- Overpayment Recovery
- PE Portal Determination
- Unable to Complete Conversion

Medical Eligibility: EDBC

Lesson 5: Overriding EDBC > Program Configuration

Medicaid EDBC Summary

Accept Cancel

Regular

Program Configuration

System Parameters

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened
McKnight, Sophia	03/18/1984	MEM		Active		N
McKnight, Michael	01/19/1982	FRI	No Linkage to MA	Active		Y
McKnight, Christopher	06/27/2010	MEM		Active		N
McKnight, Sarah	10/05/2014	MEM		Active		N

Override Program Configuration

Reporting Configuration

Test

MedicalSummary

Note: Overridden rows are in bold.

Eligible Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Caretaker Medical	Fail	40%	\$0.00			McKnight, Sophia McKnight, Michael	FRI FRI	Parent Parent

Failed and Overridden Budgets

Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	LTC Details	Members Tested	Role	Role Reason
MAGI Caretaker Medical	Fail	40%	\$0.00			McKnight, Sophia McKnight, Michael	FRI FRI	Parent Parent

McKnight, Sarah FRI

Override Medical Summary

Accept Cancel



Medical Eligibility: EDBC

Lesson 5: Overriding EDBC > Medical Summary Page

Medical Summary

- Regulation Change
- New Policy
- Manual EDBC Program

Override Medical Summary

- Determination based on regulations
- Override if determination was incorrect, for reasons other than data entry errors

Medical Eligibility: EDBC

Lesson 5: Overriding EDBC > Summary

- Overriding is used to change the eligibility determination made by KEES.
- You would override program configuration if KEES determination was not correct for a reason other than incorrect data entry.



- Lesson 1: What is EDBC
- Lesson 2: Run EDBC
- Lesson 3: Review and Verify EDBC
- Lesson 4: Troubleshooting EDBC
- Lesson 5: Overriding EDBC
- **Lesson 6: Manual EDBC**
- Lesson 7: Batch Eligibility Processes





Medical Eligibility: EDBC

Lesson 6: Manual EDBC > Manual EDBC

A manual EDBC is used for a few programs that do not have rules built into EDBC such as:

- Presumptive Eligibility (PE)
- Presumptive Eligibility Pregnant Women (PE PW)

Create Manual EDBC Create Manual EDBC Cancel

* - Indicates required fields

Benefit Month:* 06/2013 ▾

Manual EDBC Reason:* ▾

Program	Status
<input type="checkbox"/> Medical	Pending

Create Manual EDBC Cancel



Medical Eligibility: EDBC

Lesson 6: Manual EDBC

Select the correct benefit month from the **Benefit Month** drop-down box and click the **Go** button.

A reason for the manual EDBC is selected from the **Manual EDBC Reason** drop-down box.

Create Manual EDBC

Create Manual EDBC Cancel

* - Indicates required fields

Benefit Month:* 07/2013 ▾	Manual EDBC Reason:* ▾
<input type="checkbox"/> Program	Status
<input checked="" type="checkbox"/> Medical	Active

Create Manual EDBC Cancel

Click the Run EDBC Program:

Create Manual EDBC



Medical Eligibility: EDBC

Lesson 6: Manual EDBC

On the **EDBC List** page after the manual EDBC has been created the **EDBC Source** will show **Manual**.

EDBC List

Cancel

Display by:

Program:

Type Reason:

From:

To:

View

Search Results Summary

Results 1 - 3 of 3

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
06/2013	07/2013	Medical	Regular	Accepted - Saved	Details	06/24/2013	Online EDBC Rules
07/2013	07/2013	Medical	Regular	Not Accepted	Details	06/30/2013	Manual
08/2013		Medical	Regular	Accepted - Saved	Fail	06/25/2013	Online EDBC Rules

Cancel



Medical EDBC Summary (Manual)

Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2013	07/2013	06/30/2013	Not Accepted	apsp user

EDBC Information

Type:
Regular

Program Configuration

Override Reason: New Policy

System Determination

EDBC Source: Manual

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Collins, Shaun	11/04/1954	MEM		Active	

Set Program Configuration

1. Click **Set Program Configuration**.
2. Update the status to 'Active'.
3. Edit the Program Configuration for the applicant.
4. Save and Return.



Medical Eligibility: EDBC

Lesson 6: Manual EDBC

Next the user will need to set the medical summary by clicking **Set Medical Summary**.

MedicalSummary							
Eligible Budgets							
Test	Result	FPL %	Premium/LTC Liability/Spenddown	Aid Code	Members Tested	Role	Role Reason
No Data Found							
Failed Budgets							
Test	Result	Premium/LTC Liability/Spenddown	Aid Code	Members Tested	Role	Role Reason	
No Data Found							

[Set Medicaid Summary](#)



Medical Eligibility: EDBC

Lesson 6: Manual EDBC > Summary

A manual EDBC is a determination of eligibility made outside of KEES.

A Notice of Action is not created when a Manual EDBC is run.



- Lesson 1: What is EDBC
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- Lesson 6: Manual EDBC
- **Lesson 7: Batch Eligibility Processes**





Medical Eligibility: EDBC

Lesson 7: Batch Eligibility Processes

What is Batch Eligibility?

- The process of running EDBC systematically on a scheduled basis.
 - This is done for changes that affect many cases at once as well as for individual case changes (i.e. age changes).
-
1. Identify Cases/Programs that can be Processed in Batch
 2. Execute EDBC for Each Case/Program
 3. Determine Authorized Benefits
 4. Approve Each Batch EDBC Result
 5. Create and Approve a NOA for Each EDBC Result
 6. Generate the Batch Eligibility Report



Medical Eligibility: EDBC

Lesson 7: Batch Eligibility Processes

Other Things to Know:

- KEES automatically approves and generates a Notice of Action (NOA), if appropriate, for each Batch EDBC result.
- A task will be created for program that do not process automatically. Worker action will be necessary.
- The system produces tasks for action when validations, such as identification of overpayments, require worker action.



Medical Eligibility: EDBC

Lesson 7: Batch Eligibility Processes

EDBC results will appear on the EDBC List and EDBC Results List page for EDBCs completed through Batch Eligibility similar to EDBCs that you run, accept and save yourself.

Medicaid EDBC Summary

Close

Begin Month	End Month	Run Date	Run Status	Accepted By
02/2015		12/15/2014	Accepted - Saved	PB00E509 Batch

EDBC Information	
EDBC Run Reason: RE	
Type:	
Regular	

Program Configuration						
System Determination						
EDBC Source:	Batch EDBC Rules					
Program Status:	Active					
Note: Overridden rows are in bold.						
Name	DOB	Role	Role Reason	Status	Status Reason	QHP Screened

The EDBC Source for EDBCs processed through Batch Eligibility will display as "Batch EDBC Rules".



Medical Eligibility: EDBC

Lesson 7: Batch Eligibility Processes

An automated task will tell you which programs were not processed through batch eligibility and for which benefit month EDBC needs to be run.





Medical Eligibility: EDBC

Lesson 7: Batch Eligibility Processes > Summary

In Lesson 7 we learned:

The Batch Eligibility process runs at night and will run with the rules

Users will be notified which cases did not run during the Batch Eligibility

EDBC results will appear on the EDBC List and EDBC Results List page for EDBC's completed through Batch Eligibility similar to EDBC's that you run, accept and save yourself.

In this course, you learned how to:

- Explain EDBC
- Understand how a “Rules Engine” relates to EDBC
- Run EDBC
- Review and Verify EDBC
- Override a program configuration
- Create a manual EDBC
- Describe batch eligibility processes



Medical Eligibility: EDBC

Questions

QUESTIONS?

