



Medical Eligibility

Prior Medical

Medical Eligibility: Prior Medical

Introduction

In this course, you will learn how to add prior medical months for any medical programs in which the consumer is applying for or participating in.

After completing this course, you will be able to:

- Add Prior Medical Months
- Understand how Effective Dating impacts Prior Medical Coverage
- Run EDBC for Prior Medical



Medical Eligibility: Prior Medical Agenda

- **Lesson 1: Add Prior Medical Months**
- Lesson 2: Understand how Effective Dating impacts Prior Medical Coverage
- Lesson 3: Run EDBC for Prior Medical





Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical

An applicant for medical assistance may request a determination of medical eligibility for a three month period prior to the month of application.

Prior eligibility can be established even though there is no eligibility for the current base period.

Prior Medical requests can be completed at any time during the processing of an application or after the initial EDBC is run.

Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical

Prior Medical is requested on the Medical Person Detail page.

Step 1: There are 7 main steps to add prior medical months to a case. On the **Case Summary** page click the View Details button in the Medical Program block for the consumer requesting Prior Medical.

Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Child	MEM		Active	
Child	MEM		Active	
Primary Applicant	FRI	No Linkage to MA	Active	

[View Details](#)



Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical

Step 2: On the **Medical Program Detail** page click the **Edit** button.

The screenshot shows the 'Medical Program Detail' page in the KEES system. The page has a navigation bar at the top with tabs for Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. Below the navigation bar is a sub-menu with tabs for Workload Inventory, Case Summary, Customer Information, Reporting, Distributed Documents, Customer Schedule, and Courtesy Month. The main content area is titled 'Medical Program Detail' and includes a search section with 'Case Number' and 'Request ID' options, a 'Go' button, and a 'Person Search' section. A sidebar on the left contains a list of navigation links: Case Summary, Contact, Negative Action, New Program, New Person, Hide Person, Legacy Case, and Access List. The main content area displays the following information:

Date:*
01/01/2015

Program Information

Status:* Active	Status Reason:	Household Premium Amount: 0.00
Application Date:* 12/05/2014	Review Begin Month: 12/2014	Review Due Month:* 11/2015
Automatically Reassign When Activated: Yes	Assign To Medical Only: No	Delinquent Premiums: Date:

At the top right of the main content area, there are four buttons: 'View History', 'TMC', 'Edit', and 'Close'. The 'Edit' button is circled in red.

Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical

Step 3: Click the **Edit** button in the **Program Persons** section for the consumer requesting Prior Medical.

Case Number
 Request ID

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case

Medical Program Detail

* - Indicates required fields

Date:

Program Information

Status: Active **Status Reason:** **Household Premium Amount:**

Program Persons

Name	CE	Requested Medicaid Type	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason	
Christopher Gray	11/2015	Medical	Child	MEM		Active		<input type="button" value="Edit"/>
Edward Gray	11/2015	Medical	Child	MEM		Active		<input type="button" value="Edit"/>
Mary Gray		Medical	Primary Applicant	FRI	No Linkage to MA	Active		<input type="button" value="Edit"/>



Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical

Step 4: **Medical Person Detail** page appears. At the bottom of the page, in the **Retro Months** section you can **add** up to three (3) months for Prior Medical.

For each month:

- Enter the Month.
- Select the Requested Medical Type.
- Click Add.

Medical Person Detail

Recipient Information		
Name:* Mary Gray		
Application Date:* 12/05/2014	Beginning Date Of Aid:* 12/01/2014	
Requested Medicaid Type		
Type	Begin Month	End Month
Medical	12/2014	
<input type="button" value="Edit"/>		
<input type="button" value="Add"/>		
Continuous Eligibility Periods		
Aid Code	Begin Month	End Month
Retro Months		
Month	Requested Medical Type	
<input type="text"/>	<input type="text"/>	
<input type="button" value="Add"/>		

* - Indicates required fields

Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical

Step 5: After all month(s) are added click the **Save and Return** button.

Case Name: Mary Gray
Case Number: 20000754

Journal | Tasks | Reminders | Contact Log | Logout | Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/08/2014 05:24 PM

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

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

Case Number
 Request ID
[] [Go]

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case
- Access List

Medical Person Detail

Save and Return [Cancel]

Recipient Information

Name:*
Mary Gray

Application Date:* 12/05/2014 **Beginning Date Of Aid:*** 12/01/2014

Requested Medicaid Type

Type	Begin Month	End Month
Medical	12/2014	

[Edit] [Add]

Continuous Eligibility Periods

Aid Code	Begin Month	End Month
	09/2014	
	10/2014	
	11/2014	

Retro Months

Month	Requested Medical Type
<input type="checkbox"/> 09/2014	Medical
<input type="checkbox"/> 10/2014	Medical
<input type="checkbox"/> 11/2014	Medical

[Remove] [Add]

* - Indicates required fields

Save and Return [Cancel]

Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical

Step 6: On the **Medical Program Detail** page, complete STEPS 3 through 5 for each program person requesting Prior Medical.

Case Number
 Request ID

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case

Medical Program Detail

* - Indicates required fields

Date:*

Program Information

Status:* **Status Reason:** **Household Premium Amount:**

Active

Program Persons

Name	CE	Requested Medicaid Type	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason	Edit
Christopher Gray	11/2015	Medical	Child	MEM		Active		<input type="button" value="Edit"/>
Edward Gray	11/2015	Medical	Child	MEM		Active		<input type="button" value="Edit"/>
Mary Gray		Medical	Primary Applicant	FRI	No Linkage to MA	Active		<input type="button" value="Edit"/>

Step 7: When all Prior Medical has been added, click **Save and Return** on the **Medical Program Detail** page to return to the **Case Summary** page.

Medical Eligibility: Prior Medical

Lesson 1: Adding Prior Medical > Summary

In this lesson we learned :

- Prior medical request can be completed at anytime.
- There are 7 steps in how to add prior medical to a case.



Medical Eligibility: Prior Medical Agenda

- Lesson 1: Add Prior Medical Months
- **Lesson 2: Understand how Effective Dating impacts Prior Medical Coverage**
- Lesson 3: Run EDBC for Prior Medical



Medical Eligibility: Prior Medical

Lesson 2: Effective Dating

- It is important to capture the financial and non-financial information for these consumers for the prior medical months.
- The Begin Date and End Date of these records must reflect the consumer's situation at the time he/she is requesting prior medical coverage.
- If a Begin Date is after the Prior Medical month, rules do not use that information in the benefit calculation.



Medical Eligibility: Prior Medical

Lesson 2: Effective Dating

For example: The Begin Date for the Address, Relationships, Income, Resources, Expenses, etc., should be the first day of the month prior medical begins.

Case: From: To:

[View](#) [Search Address](#) [Add](#)

Person	Type	Address	Begin Date	End Date	Action
Gray, Christopher	Mailing	315 SW HILLSIDE AVE TOPEKA, KS 66611-1136	12/01/2014		Edit
Gray, Edward	Mailing	315 SW HILLSIDE AVE TOPEKA, KS 66611-1136	12/01/2014		Edit
Gray, Mary	Mailing	315 SW HILLSIDE AVE TOPEKA, KS 66611-1136	09/01/2014		Edit
Gray, Edward	Physical	315 SW HILLSIDE AVE TOPEKA, KS 66611-1136	12/01/2014		Edit
Gray, Christopher	Physical	315 SW HILLSIDE AVE TOPEKA, KS 66611-1136	12/01/2014		Edit
Gray, Mary	Physical	315 SW HILLSIDE AVE TOPEKA, KS 66611-1136	09/01/2014		Edit

[Search Address](#) [Add](#)



Medical Eligibility: Prior Medical

Lesson 2: Effective Dating

For Long Term Care (LTC) and Working Healthy (WH) cases, the prior medical month income must be recorded in the Average Calculator section on the Income Amount Detail page.

Case Name: Victor Williams
Case Number: 20000766

Journal Tasks Reminders Contact Log Logout Help
User: Dana George
Env: NPD22
Ver: 2.6.000.0.1
Time: 12/10/2014 01:19 PM

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

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

Case Number Request ID Go

Person Search

Non Financial Presumptive Eligibility Financial Root Questions

Income Resource Special Needs Expenses Tax Medicare Expense Medical Subrogation Other Health Insurance Health Care Ref. IEVS Applicant Verifications EBT Account List Run EDBC Manual EDBC Needs Service Arrangements EDBC Results

Income Amount Detail Save and Return Cancel

Program: Elderly & Disabled
*- Indicates required fields

Program: Elderly & Disabled Category: Earnings Type: Wages

Average Calculator

	Date Received	Amount	Hours	Hourly Wage	Count in Average
<input type="checkbox"/>	09/01/2014	150.00			Yes
<input type="checkbox"/>	10/01/2014	225.00			Yes
<input type="checkbox"/>	11/01/2014	333.25			Yes

Remove Add Calculate Use

Average Amount: 236.08 Weekly Hours: NaN Monthly Hours: NaN

Reported Amount: 236.08 Unreported Amount: 0.00

Begin Date: 09/01/2014 End Date: 11/30/2014

Verified: Verified Source: Document

Save and Return Cancel

The Income Amount Detail is what the rules reference to capture the “actual” income received by the consumer in a prior medical month.



Medical Eligibility: Prior Medical

Lesson 2: Effective Dating > Summary

The Average Calculator is also used to record any actual amounts of income received in prior medical month.

Case Name: Mary Gray
Case Number: 20000754

Journal Tasks Reminders Contact Log Logout Help
User: Dana George
Env: NPD22
Ver: 2.6.000.0.1
Time: 01/12/2015 04:19 PM

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

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

Case Number Request ID
Person Search

Non Financial Presumptive Eligibility Financial
Income Resource Special Needs Expenses Tax Medicare Expense Medical Subrogation Other Health Insurance Health Care Ref. IEVS Applicant Verifications EBT Account List Run EDBC Manual EDBC Needs Service Arrangements EDBC Results

Income Amount Detail

Program: Family Medical
* Indicates required fields

Program: Family Medical Category: Earnings Type: Wages

▼ Average Calculator

	Date Received	Amount	Hours	Hourly Wage	Count in Average
<input type="checkbox"/>	09/12/2014	349.91	42	7.75	Yes
<input type="checkbox"/>	09/26/2014	366.58	44	7.75	Yes
<input type="checkbox"/>	10/10/2014	333.25	40	7.75	Yes

Remove Add Calculate Use

Average Amount: 752.31 Weekly Hours: 21.00 Monthly Hours: 90.30

Reported Amount: 752.31 Unreported Amount: 0.00

Begin Date: 09/01/2014 End Date: 10/10/2014

Verified: Verified Source: Document

Save and Return Cancel



Medical Eligibility: Prior Medical

Lesson 2: Effective Dating > Summary

In this lesson we learned :

- It is important to capture the financial and non-financial information for these consumers for the prior medical months.
- The Begin Date and End Date of these records must reflect the consumer's situation at the time he/she is requesting coverage.
- If a Begin Date is after the Prior Medical month, rules will not use that information in the benefit calculation.
- For LTC and WH cases, actual income must be recorded in the Average Calculator section for Prior Medical determination.

Medical Eligibility: Prior Medical Agenda

- Lesson 1: Add Prior Medical Months
- Lesson 2: Understand how Effective Dating impacts Prior Medical Coverage
- **Lesson 3: Run EDBC for Prior Medical**





Medical Eligibility: Prior Medical

Lesson 3: Run EDBC for Prior Medical

Running EDBC is the last step in authorizing Prior Medical months.

There are eight (8) steps in this process.

Medical Eligibility: Prior Medical

Lesson 3: Run EDBC for Prior Medical

Step 1: After the Prior Months, financial, and non-financial information has been added, navigate to the **Run EDBC** page.

Step 2: Select the Prior Month from the **Benefit Month** drop-down menu.

Step 3: Click the **Run EDBC** button.

Case Name: Victor Williams
Case Number: 20000766

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/10/2014 05:04 PM

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

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

Case Number Request ID Go

Person Search

- Non Financial
- Presumptive Eligibility
- Financial
 - Verifications
 - EBT Account List
 - Run EDBC**
 - Manual EDBC
 - Needs
 - Service Arrangements
 - EDBC Results

Run EDBC Run EDBC Cancel

* - Indicates required fields

Benefit Month: *
09/2014
01/2015
01/2015
12/2014
11/2014
10/2014
09/2014

Program	Status	Timely Notice Exception	Reason	Run Reason
Prior Medical	Pending			

Run EDBC Cancel

Medical Eligibility: Prior Medical

Lesson 3: Run EDBC for Prior Medical

Step 4: On the **EDBC List** page select the Medical hyperlink for the EDBC result in a status of “Not Accepted”.

Case Name: Victor Williams
Case Number: 20000766

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/11/2014 10:17 AM

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

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

EDBC List Cancel

Display by: Program: Type Reason: From: 08/2014 To: 10/2014 View

Search Results Summary Results 1 - 1 of 1

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
09/2014	09/2014	Medical	Regular	Not Accepted	Details	12/11/2014	Online EDBC Rules

Cancel

Medical Eligibility: Prior Medical

Lesson 3: Run EDBC for Prior Medical

Step 5: Review the results on the **Medical EDBC Summary** page.

Step 6: Click the **Accept** button if the results are accurate.

Case Name: Victor Williams
Case Number: 20000766

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/11/2014 10:31 AM

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

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

Medicaid EDBC Summary Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
09/2014	09/2014	12/11/2014	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
Williams, Victor	02/22/1969	MEM		Active		N

Override Program Configuration



Medical Eligibility: Prior Medical

Lesson 3: Run EDBC for Prior Medical

Step 7: The **EDBC List** page appears with the **Run Status of Accepted-Not Saved**. Click the **Save and Continue** button.

Step 8: Review all auto-generated Notifications for accuracy.

Repeat Steps 1 to 8 for each month of requested Prior Medical.

Medical Eligibility: Prior Medical

Lesson 3: Run EDCB for Prior Medical > Summary

In this lesson we learned :

- How to run EDBC for the prior medical months.
- There are eight (8) steps in authorizing Prior Medical months that need to be repeated for each prior medical month requested.
- It is important to review and verify each Prior Medical month before accepting the results.



Medical Eligibility: Prior Medical Summary

In this course, you learned how to:

- Enter Prior Medical months
- Understand how a “Rules Engine” relates to EDBC
- Run EDBC
- Review and Verify EDBC
- Run EDBC for Prior Medical