



# Medical Eligibility

Verifications

# Medical Eligibility: Verifications

## Introduction

After completing this course, you will be able to:

- Recognize shared and unshared verifications
- Record Verification values
- Identify Source values
- Locate the Verification List page
- Generate a Verification Request form
- Process verifications received from a consumer



- **Lesson 1: Verification Fields**
- Lesson 2: Verification Options
- Lesson 3: How EDBC Rules use Verifications
- Lesson 4: Verification List Page
- Lesson 5: Request Verification Form
- Lesson 6: Verification Received





# Medical Eligibility: Verifications

## Lesson 1: Verification Fields > Shared and Unshared

Most data collection screens have verification fields which capture whether the information entered has been verified. Some verified data is shared between programs and agencies. Other verifications are separated.

An example of data that is separate is income. The user will select the program (Family Medical vs. Elderly and Disabled) to which the income applies before verifying the income.



# Medical Eligibility: Verifications

## Lesson 1: Verification Fields > Shared and Unshared

Verifications that are shared between agencies for an individual have only one verification field.

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

Case Number Request ID

Person Search

**Non Financial**

- Contact
- Root Questions
- Individual Demographics**
- Citizenship/Identity
- Household Status
- Relationship
- Non-Citizenship
- Pregnancy
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt
- Time Limits
- Purch. and Prep.
- School Attend.
- Employment
- Work Regist.
- Living Arrgmt
- LTC Data
- Noncustodial Parents
- Medical Condition

**Presumptive Eligibility**

- Financial**
- Verifications
- EBT Account List
- Run EDBC

**Individual Demographics Detail**

\* - Indicates required fields

**Name**

**First Name:\***  **Middle Name/Initial:**  **Last Name:\***

**Suffix:**  **Maiden Name:**

**Social Security Number:**  **SSN Status:\***

**Client ID:**

**Marital Status:**  **Gender:\***

**Date of Birth:**  **Verified:**

**Is this individual a Veteran?**  **Spouse of a Veteran?**

**Race/Ethnic Origin:**

- American Indian or Alaskan Native
- Asian Indian
- Black or African American
- Chinese
- Filipino
- Guamanian or Chamorro
- Korean
- Native Hawaiian
- Other Pacific Islander
- Samoan
- Unknown
- Vietnamese



# Medical Eligibility: Verifications

## Lesson 1: Verification Fields > Shared and Unshared

**Pregnancy, Resources, Income & Verifications** allows the user to select Medical or Non-Medical in a Program Type drop-down before entering the data.

Case Name: Sally Sunshine  
Case Number: 20000797

Journal Tasks Reminders Contact Log Logout Help

User: Dana George Env: NPD22

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
 

- Contact
- Root Questions
- Individual Demographics
- Citizenship/Identity
- Household Status
- Relationship
- Non-Citizenship
- Pregnancy**
  - Residency
  - Other Prog. Assist.
  - Non-Compliance
  - Customer Options
  - Money Mngmt
  - Time Limits
  - Purch. and Prep.
  - School Attend.
  - Employment
  - Work Regist.
  - Living Arrgmt
  - LTC Data
  - Occupational

Images Continue

**Pregnancy List**

\* - Indicates required fields

Root Questions

Display by Program Type: From: To: View Add

Mother	Program Type	Date Reported	Due Date	Delivery/Termination Date
No Data Found				

Program Type: \* Medical Add Complete Continue



# Medical Eligibility: Verifications

## Lesson 1: Verification Fields > Shared and Unshared

Case Name: Tammy Brown  
Case Number: 20000770

Journal Tasks Reminders Contact Log Logout Help

User : Dana George  
Emp : NDD22

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

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

Case Number  
Request ID

Person Search

**Non Financial**

- Contact
- Root Questions
- Individual Demographics
- Citizenship/Identity
- Household Status
- Relationship**
- Non-Citizenship
- Pregnancy
- Residency
- Other Prog. Assist.
- Non-Compliance

### Relationship Detail

\* - Indicates required fields.

**First Individual:\*** Tammy Brown

**Relationship:\*** Parent

**Second Individual:\*** Betty Brown

**Has Care and Control**

**Begin Date:\*** 12/01/2014

**End Date:**

**Medical Verified**

Verified

**Non-Medical Verified:**

Last Updated On 12/10/2014 3:27:27 PM By: [1007364](#)

Shared data on some pages have a Medical verification field and a Non-Medical verification field on the page.



# Medical Eligibility: Verifications

## Lesson 1: Verification Fields > Summary

Some verifications are field specific, other verifications are page specific.

It is important when marking information verified to pay close attention to what information is being verified.

This concludes the portion on the verification field in KEES.





- Lesson 1: Verification Fields
- **Lesson 2: Verification Options**
- Lesson 3: How EDBC Rules use Verifications
- Lesson 4: Verification List Page
- Lesson 5: Request Verification Form
- Lesson 6: Verification Received





# Medical Eligibility: Verifications

## Lesson 2: Verification Options > Introduction



The drop-down options for the verified field can be selected by a worker or populated by interface data.

Let's look at the verification options for KEES.



# Medical Eligibility: Verifications

## Lesson 2: Verification Options > Drop-down Options

The dropdown values in ***most*** of the verification fields are:

**Verified:** This value is used when the user has some form of verification. Verification can be received from multiple sources.

**Not Applicable:** This value is used when the verification is not needed for the program.

**Pending:** This value is used when the verification needs to be requested.

**Refused:** This value is used when the consumer either refuses to provide or fails to provide the necessary information.



# Medical Eligibility: Verifications

## Lesson 2: Verification Options > SSN Status

SSN Status has its own special drop-down menu. The options for verifying SSN are:

- HUB-SSA – set by interface
- SSA-SVES – set by interface
- Good Cause
- SSN application filed at SSA
- SSN Provided
- No SSN Available

NOTE: This verification field is shared between agencies.

The first four verification values are considered Verified for medical programs.

The last two values are viewed as Pending and should populate a SSN request to the **Verification List** page.



# Medical Eligibility: Verifications

## Lesson 2: Verification Options > Sources

Verification fields can be completed by a worker or by an interface.  
Some Verified fields have a corresponding Source field

Some Auto-Populated Sources include:

- HUB-SSA- Social Security
- KDOL- KS Department of Labor
- SDX-SSI



# Medical Eligibility: Verifications

## Lesson 2: Verification Options > Sources

Some User entered Sources include:

- Consumer Statement
- Collateral Contact
- Document
- Interface

Case Number  
 Request ID

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

**Program:** Family Medical

\* - Indicates required fields

**Program:** Family Medical      **Category:** Earnings      **Type:** Wages

**▼ Average Calculator**

<input type="checkbox"/>	Date Received	Amount	Hours	Hourly Wage	Count in Average
<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="10.50"/>	Yes ▾
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Yes ▾ <input type="button" value="Add"/>

**Average Amount:**    **Weekly Hours:**    **Monthly Hours:**

0.00                      0.00                      0.00

---

**Reported Amount:\***

**Begin Date:\***

**Verified:\***

**Unreported Amount:**

**End Date:**

**Source:\***

# Medical Eligibility: Verifications

## Lesson 2: Verification Options > Summary

Now that we have looked at the verification drop-down options for determining the status of entered data, let's examine how EDBC rules use the verification data in determining eligibility.



- Lesson 1: Verification Fields
- Lesson 2: Verification Options
- **Lesson 3: How EDBC Rules use Verifications**
- Lesson 4: Verification List Page
- Lesson 5: Request Verification Form
- Lesson 6: Verification Received



# Medical Eligibility: Verifications

## Lesson 3: How EDBC Rules use Verifications > Introduction

KEES has a rules engine that takes the data entered on various system pages, and then uses the information to determine eligibility for various medical programs.

Let's go over how verification and source information interact with the rule base for EDBC.



# Medical Eligibility: Verifications

## Lesson 3: How EDBC Rules use Verifications > EDBC Warnings

Case Name: Tammy Brown  
Case Number: 20000770

Journal Tasks Reminders Contact Log Logout Help

User : Dana George  
Emp : 00022

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**

\* - Indicates required fields

Benefit Month: \*  
12/2014

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

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

- Tammy Brown
  - Name/Identity
  - Expense Amount
  - Vital Statistics US Citizenship
  - Date of Birth
  - Vital Statistics
  - Vital Statistics Identity
  - Income
  - Employment Information

The EDBC rules are designed to “know” which verifications are required for program eligibility.

Any time a data element is Pending, the rules issue a warning to alert the user that data has not been verified.

# Medical Eligibility: Verifications

## Lesson 3: How EDBC Rules use Verifications > Summary

In this lesson we looked how the KEES rules engine uses the data entered on system pages to determine eligibility for various medical programs. If data is missing, pending or refused, a warning will display.



- Lesson 1: Verification Fields
- Lesson 2: Verification Options
- Lesson 3: How EDBC Rules use Verifications
- **Lesson 4: Verification List Page**
- Lesson 5: Request Verification Form
- Lesson 6: Verification Received





# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Introduction

The **Verification List** page consolidates all the Pending verifications for a case.

To access the **Verification List** page, once in the context of a case, click the **Eligibility** tab on the Global Navigation, **Customer Information** on the Local Navigation and **Verifications** on the Task Navigation.

NOTE: All verifications on the list page are at the consumer level. If verification is needed for a consumer it will display on the **Verification List** page.



# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Overview

The **Verification List** page shows all verifications selected on the data collection pages. For a new application, the user can sort by Pending status to determine which verifications are still needed to process the case.

Case Name: Tammy Brown  
Case Number: 20000770

Journal Tasks Reminders Contact Log Logout Help

User: Dana George  
Emp: 110022

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

### Verification List

Generate Form Continue

Status:\* Pending Program Type:\* Medical From: To: View

Program Type:\* Medical Add

Type	Program Type	Name	Request Date	Due Date	Source	Postponed ES	
<input type="checkbox"/> Expense Amount	Medical	Brown, Tammy	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Name/Identity	All	Brown, Betty	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Name/Identity	All	Brown, Tammy	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Date of Birth	All	Brown, Betty	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Date of Birth	All	Brown, Tammy	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Employment Information	Medical	Brown, Tammy	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Income	Medical	Brown, Betty	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Income	Medical	Brown, Betty	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Income	Medical	Brown, Tammy	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Vital Statistics	Medical	Brown, Betty	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Vital Statistics	Medical	Brown, Tammy	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Vital Statistics US Citizenship	Medical	Brown, Betty	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Vital Statistics US Citizenship	Medical	Brown, Tammy	12/10/2014	12/20/2014			Edit
<input type="checkbox"/> Vital Statistics	All	Brown, Betty	12/10/2014	12/20/2014			Edit

# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Sort and Edit Functions

### Verification List

[Generate Form](#) [Continue](#)

**Status:\*** 
**Program Type:\*** 
**From:** 
**To:** 
[View](#)

**Program Type:\*** 
[Add](#)

<input type="checkbox"/> Type	Program Type	Name	Request Date	Due Date	Source	Postponed	ES
<input type="checkbox"/> <a href="#">Expense Amount</a>	Medical	Brown, Tammy	12/10/2014	12/20/2014			<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Name/Identity</a>	All	Brown, Betty	12/10/2014	12/20/2014			<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Name/Identity</a>	All	Brown, Tammy	12/10/2014	12/20/2014			<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Date of Birth</a>	All	Brown, Betty	12/10/2014	12/20/2014			<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Date of Birth</a>	All	Brown, Tammy	12/10/2014	12/20/2014			<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Employment Information</a>	Medical	Brown, Tammy	12/10/2014	12/20/2014			<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Income</a>	Medical	Brown, Betty	12/10/2014	12/20/2014			<a href="#">Edit</a>

Each of the verifications has a select checkbox to the left of the **Type** information. Each of the verifications also has an **Edit** button on the right side of the screen. The **Edit** button can be used to mark the information as verified or to extend the due date for the verification. Editing the due date on verifications needs to follow the appropriate business processes.

# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Verified

Type	Program Type	Name	Request Date	Due Date	Source	Postponed ES
Name/Identity	Medical	ODOM, THAINE	06/03/2014	06/13/2014	No	Edit
Name/Identity	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
SSN	Medical	ODOM, THAINE	06/03/2014	12/01/9999	No	Edit
SSN	Medical	ODOM, WILLIAM	12/01/9999	12/01/9999	No	Edit
SSN	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Date of Birth	Medical	ODOM, THAINE	06/03/2014	12/01/9999	No	Edit
Date of Birth	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Residence	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Income	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Liquid Resource	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Liquid Resource	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Vital Statistics	Medical	ODOM, THAINE	06/03/2014	06/13/2014	No	Edit
Vital Statistics	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Vital Statistics US Citizenship	Medical	ODOM, THAINE	06/03/2014	06/13/2014	No	Edit
Vital Statistics US Citizenship	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit
Vital Statistics Identity	Medical	ODOM, THAINE	06/03/2014	06/13/2014	No	Edit
Vital Statistics Identity	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999	No	Edit

\* - Indicates required fields

Below the displayed verifications is a **Verify** button. **This button should not be used.** The user will need to go to the appropriate page, record the correct value in the Verified drop-down, and record a Source when applicable.

# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Adding a Verification to Request

Person Search: - Select -    - Select -    View

Program Type: \* Medical    Add

Type	Program Type	Name	Request Date	Due Date	Source	Postponed ES
<input type="checkbox"/> <a href="#">Name/Identity</a>	Medical	ODOM, THAINE	06/03/2014	06/13/2014		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Name/Identity</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">SSN</a>	Medical	ODOM, THAINE	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">SSN</a>	Medical	ODOM, WILLIAM	12/01/9999	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">SSN</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Date of Birth</a>	Medical	ODOM, THAINE	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Date of Birth</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Residence</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Income</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Liquid Resource</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Liquid Resource</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Vital Statistics</a>	Medical	ODOM, THAINE	06/03/2014	06/13/2014		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Vital Statistics</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Vital Statistics US Citizenship</a>	Medical	ODOM, THAINE	06/03/2014	06/13/2014		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Vital Statistics US Citizenship</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Vital Statistics Identity</a>	Medical	ODOM, THAINE	06/03/2014	06/13/2014		No <a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Vital Statistics Identity</a>	Medical	ODOM, WILLIAM	06/03/2014	12/01/9999		No <a href="#">Edit</a>

Verify    Program Type: \* Medical    Add

\* - Indicates required fields       Generate Form    Continue

To the right of the **Verify** button is the place to add additional verifications that need to be requested. Select the **Program Type** (Medical) from the drop-down and click the **Add** button.

This action takes the user to the **Verification Detail** page.



# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Verification Detail Page: Types

Case Name: CYNTHIA S FRYE  
Case Number: 12687770
Journal   Tasks   Reminders   Contact Log   Logout   Help  
User : Dana George  
Env : NPD22  
Ver : 2.5.004.1  
Time : 12/04/2014 03:46 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

### Verification Detail

Check Spelling Save and Return Cancel

\* - Indicates required fields.

<p><b>Type:</b> * Potential Resources</p> <p><b>Name:</b> * CYNTHIA S FRYE</p> <p><b>Request Date:</b> * 12/04/2014</p> <p><b>Description:</b> We will need a copy of your November bank statement from Bank of America</p>	<p><b>Program Type:</b> * Medical</p> <p><b>Status:</b> * Pending</p> <p><b>Due Date:</b> * 12/14/2014</p>
---	--

Check Spelling Save and Return Cancel

Once the verification **Type** is selected, select the **Name** of the individual from whom the verification is required using the **Name** drop-down box. Update the **Status**, **Request Date** and **Due Date** fields.

A user may also enter free form text in the **Description** box.



# Medical Eligibility: Verifications

Lesson 4: Verification List Page > Verification Detail Page: Types

On the **Verification Detail** page, select the **Type** of verification. The options include:

- Application Sig Page
- Date of Birth
- Date of Death
- Dependent Care expense
- Dependent Care Monthly Income
- Employment Information
- Expected Return Date
- Expense
- Expense Amount
- Identity Verification
- Income – drop down or type
- Legal Guardianship
- Medical Condition
- Medicare Information
- Motor Vehicle Registration
- Name/Identity
- Other Health Care Coverage
- Other Program Assistance
- Potential Resources
- Pregnancy
- Real Property Bona fide Effort
- Relationship
- Residence
- Resource – drop down or type
- Roomer/Boarder
- School Attendance
- School End Date
- School Enrollment
- School Expected Completion Date
- Self-Employment Expense
- Sponsored Non-Citizen
- SSN
- Termination Reason
- Third Party Liability
- Transferred Income
- Transferred Property
- U.S. Citizenship Verification
- USCIS Document
- Utility Expense
- Work Program Orientation

# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Updated Verification List

Case Name: CYNTHIA S FRYE  
Case Number: 12687770

Journal Tasks Reminders Contact Log Logout Help  
User : Dana George Emp : NPD22  
Admin Tools Worker Portal

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

**Verification List** Generate Form Continue

Status:\* Pending Program Type:\* Medical From: 11/01/2014 To: 12/18/2014 View

Program Type:\* Medical Add

Type	Program Type	Name	Request Date	Due Date	Source	Postponed	ES
<input type="checkbox"/> <a href="#">Potential Resources</a>	Medical	FRYE, CYNTHIA	12/04/2014	12/14/2014			<span>Edit</span>
<input type="checkbox"/> <a href="#">Date of Birth</a>	Medical	FRYE, CYNTHIA	12/04/2014	12/14/2014			<span>Edit</span>
<input type="checkbox"/> <a href="#">SSN</a>	All	FRYE, CYNTHIA	03/18/1991	03/18/1991			<span>Edit</span>

Verify Request Verification

Program Type:\* Medical Add

Generate Form Continue

\* - Indicates required fields

Once the verification detail is saved, the newly recorded verification will show on the **Verification List** page. The next button on the page is the **Generate Form** button.

# Medical Eligibility: Verifications

## Lesson 4: Verification List Page > Summary

This concludes the overview of the **Verification List** and **Verification Detail** pages.

The next lesson will discuss how this information is used to create a Request Verification Form.



# Medical Eligibility: Verifications

## Agenda

- Lesson 1: Verification Fields
- Lesson 2: Verification Options
- Lesson 3: How EDBC Rules use Verifications
- Lesson 4: Verification List Page
- **Lesson 5: Request Verification Form**
- Lesson 6: Verification Received



# Medical Eligibility: Verifications

## Lesson 5: Request Verification Form > Introduction

Once all needed verifications are captured on the **Verification List** page, a form needs to be generated to send to the consumer. A user can select to send a request for all verifications on the list page or to select which verifications are generated on the Verification Form (V001).

Let's see how to generate the V001 form with selected verifications and with all verifications.



# Medical Eligibility: Verifications

## Lesson 5: Request Verification Form

A Verification Request (V001) Form is generated using the **Generate Form** button on the **Verification List** page.

The user can determine which verifications are requested by selecting them using the checkbox to the left of the verification listed.





# Medical Eligibility: Verifications

## Lesson 5: Request Verification Form >

### Document Parameters

[Generate Form](#) [Generate Blank Template](#) [Cancel](#)

Case Number:\*

20000770

[Go](#)

Customer Name:\*

Tammy Brown

Program:\*

Medical - Tammy Brown

Language:\*

English

\* - Indicates required fields.

[Generate Form](#) [Generate Blank Template](#) [Cancel](#)

KanCare Clearinghouse  
PO Box 3599  
Topeka, KS 66601-9738



Notice Date: 01/06/2015

Case Name: Tammy Brown

Case Number: 20000770

Program: Medical

Tammy Brown  
2121 SW 3RD AVE  
Topeka, KS 66603

### Verification Request List

Here is a list of verifications that are needed to determine and/or maintain your eligibility for medical assistance.

Please provide these verifications by the due date listed below. Failure to provide the requested verification may cause your medical assistance to be denied, delayed, or closed.

Type of Verification Needed	For Person	Description	Due Date
Expense Amount	Tammy Brown	Prescription receipts	12/20/2014
Name/Identity	Betty Brown		12/20/2014
Name/Identity	Tammy Brown		12/20/2014
Date of Birth	Betty Brown		12/20/2014
Date of Birth	Tammy Brown		12/20/2014
Employment Information	Tammy Brown		12/20/2014
Income	Betty Brown		12/20/2014
Income	Betty Brown		12/20/2014
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# Medical Eligibility: Verifications

## Lesson 5: Request Verification Form > Summary

In this lesson we looked at how a user would generate a form to request verifications from a consumer.

Now let's look at how a user will update records once verifications have been received.



- Lesson 1: Verification Fields
- Lesson 2: Verification Options
- Lesson 3: How EDBC Rules use Verifications
- Lesson 4: Verification List Page
- Lesson 5: Request Verification Form
- **Lesson 6: Verification Received**





# Medical Eligibility: Verifications

## Lesson 6: Verification Received > Introduction



When requested information is received from a consumer by mail or through the SSP a task is either created or updated. A user picks up the task via the queue and then must update the case appropriately.

# Medical Eligibility: Verifications

## Lesson 6: Verification Received > Processing Verifications Received [Data Collected in KEES]

When verification documents are received for information recorded in KEES, the user will:

- Accept the Task
- Review the documentation
- Update the appropriate data collection pages (Citizenship, ID, Income, etc....) with the received information and update the verification field
- If all documentation is received, run EDBC

This completes the process for verification captured on data collection pages.



# Medical Eligibility: Verifications

## Lesson 6: Verification Received > Processing Verifications Received [Data Collected in KEES]

It is important to verify information on the appropriate page when requested information is received.

Clicking the Verify button on the Verification List page updates the verified field on the corresponding data collection page; however this will **NOT** update any other data collection information.



# Medical Eligibility: Verifications

## Lesson 6: Verification Received > Processing Verifications Received [Data Not in KEES]

When verification documents are received for information which is not recorded in KEES, but is necessary for a determination the user will:

- Accept the Task
- Review the documentation
- Update the **Journal** with the information
- Access the **Verification List** page
- Select the **Edit** button to the right of the verification received
- Mark the information as verified including received date
- If all documentation is complete, run EDBC



# Medical Eligibility: Verifications

## Lesson 6: Verification Received > Verifications Not Received

Sometimes a consumer does not provide the requested verification.

The verification should not be left **Pending**, but the verification cannot be marked received.

The verification needs to be set as **Refused** on the data collection page containing that field or if there is no corresponding field on a data collection page that can be marked Refused, the worker will need to mark the record Refused on the **Verification List** page.

Marking the verification as **Refused** allows KEES to track that the request was made and the consumer did not comply.



# Medical Eligibility: Verifications

## Summary

Once information is received from the consumer, the document is imaged and a task is generated or updated.

When a user claims a task, it is up to the worker to examine the verifications received and determine if the information provided is satisfactory to determine eligibility. If the information meets the required criteria, the information can be marked as Verified.

If appropriate verification is not received, the verification needs to have the status updated as **Refused** to allow for the case to be denied for failure to provide and for KEES to track that the consumer did not comply with the request.



This concludes the lesson on Verifications.

