
September 2017 Build Training

Q & A Document

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COLORADO

Health Care & Economic Security
Staff Development Center

Project 10862 Medical Assistance ABLE Accounts

Question	Answer
Will there be a new Liquid Asset page?	No, not a new page - just a new option in the Source and Type fields where you will now be able to select ABLE Account.
How does the worker verify that it is an ABLE account?	The member will know if they have this type of savings account. It helps them with their medication, their copayments, this kind of stuff. Members will tell you, the same as when they tell you they have a bank account or they own a vehicle or property. Members will receive a statement - just like a statement for a checking or savings account. You can ask the member to show you their statement for the ABLE account. If you want to know more about the statement, you can go on the website http://www.Colorado.org/ If you get onto the website it shows you an example of what that ABLE account looks like.
How does an individual qualify for an ABLE account?	A person applies for an ABLE account through the CO Dept. of Higher Education ABLE web page: https://www.coloradoable.org/
If a client verifies they have an ABLE acct, do we need to verify it ever again?	If the client verifies they have the ABLE account and provides you a statement, that's it. We don't need to verify it again. That's why at RRR it won't pend for that resource.
Is an ongoing client able to open an ABLE acct without it being considered a Transfer Without Fair Consideration (TWFC)?	All Resources need to be entered into CBMS and then it will be exempt. ABLE accounts could result in a TWFC just like any other exempt asset.
Did you cover the Verification Check List (VCL) and dates to provide for this?	If a customer does not provide you their ABLE account statement, they will receive a VCL. On the VCL the customer will receive their 1+10+5 days to provide the verification of the ABLE account. If they don't provide verification it will deny for failure to provide verification. If they do provide it, make sure to go in and update the case. At RRR it won't request it again.
Does it pend for proof of acct for both MAGI and Non-MAGI categories?	If it's a MAGI category it won't pend because resources don't count. But if you have a customer who is being determined eligible for Non-MAGI category it will pend.
Does the ABLE account have to be verified by external document or can it be interfaced?	Currently we need the actual document.
How will it count for AF programs?	ABLE accounts don't affect any other High Level Program Groups.



Project 11246 CBMS C4HCO User Permission Updates

Question	Answer
Will the Type and Code only be 'Other' or are there more options? Should we be selecting 'Other' all the time for these fields?	There are other options but the only one CBMS users will select is 'Other'.
Does the field open up before or after the MA denial?	As soon as you declare the customer a Non-Citizen and go to the Non-Citizen page, the field opens up to you.
All non-citizens, or if they have INS documentation - lawfully present?	It's for anyone who is lawfully present. It could be a lawfully present person on working visa status, or a legal permanent resident. As long as they are lawfully present.
If we have entered the appropriate LPR cards and verification, do we still need to do this?	No. C4 Doc Type and/or C4 Class Code should only be selected when the provided document and/or class code is not available within the Type or Class Code drop downs on the Non-Citizen Document section. This will allow eligible non-Citizens to qualify for Marketplace programs. The specific document type and class code received needs to be documented in the case comments section.
Brenda LaCombe is no longer with the Marketplace.	Contact countypartners@c4hco.com for questions about the Marketplace.

Project 10913 - Interview Requirement Enhancements

Question	Answer
Why does face-to-face not show in the interview type?	Since FA does not require specifically F2F or Phone, it will be blank because they have the option to do one or the other. In the Summary data group that was created, the RRR Due Date, Interview Required and Interview Type will be displayed. This information is pulled from the RD table so it should show Interview Type.
Did you say that a Case Comment will be auto generated when the interview screen is completed or are techs required to enter a separate	On the CDHS Interviews Page, once you save, the system will generate a generic Case Comment. For example "Face to Face Interview Conducted and Interview Date is MM-DD-YYY". You are able to add your own detailed Case Comments if you choose. On



Case Comment identifying the interview type?	our screen shot it shows that Enter Case Comment is a required field. With auto-generate, nothing else is mandated.
If an individual has HCBS or is in a Nursing Facility and meets with an Single Entry Point (SEP) case manager, what options would we use since no one is disabled?	HCBS and NF are separate from the CDHS Interviews page. This project does not relate to those programs. HCPF is not included in this project/page.
A client can have NF and HCBS as well as PNA or HCA.	HCPF programs are not included in this project.
If a worker selects and saves by mistake and then changes the information, the Case Comment would be incorrect. OR once saved, we cannot change?	The Case Comment does get generated when the page is saved. Once you hit SAVE , the comment will generate with the details that were completed on each tab. Once the Interview details are updated, you cannot go back and change them once the screen is saved.
What about Burial Applications for an ongoing Financial case - interview wouldn't be required.	We aren't changing any HLP requirements. There is just a new summary on that interview page so if you complete it, it will tell you when the next interview will be for each program.

Project 11007 - Ancillary Member Changes

Question	Answer
Are there any best practices for when to use the De-Link Individual from Case button?	Use it when you select the wrong member. For example, you are going through and you selected Tom A and you're entering the case and realize when you get to this page that you should have selected Tom B. You would then de-link Tom A.
It will not be able to de-link if the case has ever been authorized. Does this mean its only available on new cases?	It's only if you are adding an individual to the case, so they haven't ever been on the case before. For example, there is an existing case and they now want to add Bob. So, you're going to add Bob who has never been on the case before, but you selected the wrong Bob, so you could de-link him and add the correct Bob. So, this is for instances when they are not already on the case.
Delink is only for a person that has been entered in error, correct? Also, wouldn't In the Home and 50% question be 'No' if we are de-linking them?	You have to do any additional data entry. If you want to de-link that individual you would just de-link them using that De-link button.

Once a person is de-linked, can they be re-added?	They can, but you'll have to go through from the very beginning. Just like you normally would add a person to the case you would add them through the Add a Member queue and enter all their information all over again. There isn't an Undo button or a Back button. So, once you de-link them, if you realize it was the correct person after all, you'll have to add them all over again from the beginning.
If we hide or disassociate a person, will CBMS read the history records? Currently, history records for ancillary members creates exceptions on a case.	Once you de-link a person they are removed from history. Their name won't be on any of the drop-down menus. They won't be in any of the history and there won't be any data conflicts for that person once you de-link them.
How does de-linking work in ongoing mode? Is there any difference?	The functionality should be there in ongoing mode as well as intake.
Will there be a security profile for de-linking the ancillary member?	Yes - there will be a communication (or a communication has already gone out) to the Security Administrator for your county, so they will know what to do and what the security profiles are for that.
So, only supervisors can use the De-link button?	Yes, only supervisors and state security workers will have access to the De-link button.
We don't have to de-link if we list someone as ancillary? We only use de-link for members added in error? Right?	Once that case is authorized the de-link option will be disabled. You won't be able to de-link someone at that point. You want to use the de-link only when you are adding someone in error. We're giving you the opportunity at this point to de-link here. Once the case is authorized, that's when you have to go back and complete the ancillary member data entry. You have to mark them In the Home as 'No' and Requesting Aid as 'No', etc.
What is the difference between hiding someone no longer in the home and de-linking someone who was added by mistake?	To hide someone, you are de-linking them from the case completely. There's no history, no data conflicts. Once the case is authorized, the person is on the case and you have to mark them as ancillary. This project just provides an opportunity for you to de-link them <i>before</i> the case is authorized. For PEAK, once RTE is run and the person is authorized, you cannot use the de-link option.
Does this need to be done for ongoing cases with clients not in the home?	No, the purpose of the De-link button is if you are adding a person to the case and you select the wrong individual we are giving you the opportunity at this point to correct the error. So, you can de-link that



	individual. As opposed to before, you'd have to go in and mark them as In the Home 'No' and Requesting Aid 'No' . Now we're trying to save you some data entry and give you the opportunity at this point to correct the error and select the correct individual.
Is de-link for the life of the case?	Yes. Once you de-link them, they are de-linked. If you made a mistake and you want to add them back in, you'll have to go through the Add a Member queue.
Is the other ancillary member option still available for use?	If you are talking about marking them In the Home as 'No' and Requesting Aid as 'No', then yes, that option is still available to you.
With the statement of "before authorizing the case," it sounds like this is only when we are in intake. Current cases with incorrect members cannot be de-linked in ongoing mode?	A case can be in ongoing mode and you want to add a member to their case. Either they report it or you're going through another process and you want to add a member. You can do that in ongoing mode. This De-link button is if you are adding a member and you choose an incorrect person and instead of having to create a merge request, or making them ancillary, and then adding the correct member and causing confusing for the worker and the customer, we are giving you the option right now to de-link the person completely and add the correct member.
How will this impact the merge process?	We're hoping this will decrease the number of merge requests. A lot of times we are picking the wrong client because the last name or the Client ID is off. We hope that by giving you this de-link option before authorizing it'll decrease the merge process. The current merge process will remain the same as it is today, nothing is changing with that. We're just hoping to decrease those requests and allow you the opportunity up front to correct any errors.
Will this prevent these individuals from being included as liable individuals on a claim?	Yes. When you are adding a person and you select the wrong individual - you meant to select Tom A, but you accidentally picked Tom B - we're giving you the opportunity here to correct it. You can just de-link that individual. They won't be shown in history or any drop downs menus at all.
What is the guidance if the companion case belongs to another county? Are we needing to run and authorize those as well?	The process for companion cases has not changed. Additionally, this is just a message; it does not require anything.
Are the companion cases active or is it just <i>all</i> companion cases?	The companion cases will be determined with the following criteria: for the individual in the current



	authorized case, Requesting Aid is 'Yes' and In the Home is 'Yes'. The program status is 'Pending', 'Approved', or 'Discontinued' with a future date and the case status is 'Open'.
Should individuals be de-linked only if there was an error at clearance or should they be delinked when they leave the home? How should they be re-linked if it is determined that there is a claim and that individual needs to be included as a liable individual for the claim?	Yes - only when they are added in error. If they leave the home, you will need to complete the data entry as you do today (In the Home 'No', Requesting Aid 'No'.) Once you de-link them, they are de-linked. If you made a mistake and you want to add them back in, you'll have to go through the Add a Member queue.
Can we remove duplicated clients that PEAK creates as long as the case hasn't been authorized?	As long as the individual was added to the case in error, the case was not authorized, and there is nothing in the print queue for the individual(s), then you are able to use the De-link button. Once the case is authorized (RTE or Online) then the De-link button will not be enabled.
For cases that already have incorrect members it sounds like we cannot de-link them. We only can de-link before an authorization for a current mistake.	That is correct.
At authorization, will Family Preservation cases pop-up as companion cases?	Contact Laura.Smith@state.co.us for information regarding this question.
Can we use de-linking when a person passes away?	No, this is specifically for when a person is being added to the case and you select the wrong individual. In the instance when a person passes away, you'd have to do the data entry as today, going in and marking that person correctly throughout the case.

Project 10912 - Enhancements to CBMS Verification Checklist

Question	Answer
If the resource is disposed, will it still appear on the RRR VCL?	It is checking all OPEN income and resource records. So, since we don't have an effective End Date on the Resource page but the way we close out our resources is through disposition, that resource isn't going to be considered 'open'.
Will open CDLE records prompt the dynamic text for Income Verification?	The CDLE interfaces for our MA programs; CDLE really affects MA only. We're only focusing on CDHS programs with this project.



Will this work for open CDLE/DOLE records? Or just manual entries?	CDLE and DOLE - as far as the interface that posts into CBMS it's only for MA, not our CDHS programs. This project makes enhancements just for CDHS programs.
Will it ask for closed records with Client Statement?	No, the verification review is only happening on open records, So, if the system detects it as a closed record, it's not going to read it.
Will info regarding expenses be on the informational NOA?	In regard to the RRR dynamic text, right now it is just focusing on income and resources. It isn't accounting for expenses.
When will these changes take effect?	The changes will be implemented on September 17, 2017.

Project 10925 - CBMS FA No RRR Due Date for 2nd/3rd Month Denials

Question	Answer
Is it <i>any</i> denial reason or just over income?	In my example I used over-income, but the key thing is that this project is whenever the case is denied, discontinued, or terminated in the 2 nd or 3 rd month. So, it's encompassing the broad spectrum of denials.
Does this apply to Expedited FA or not?	This project is specifically about the RRR due month not being displayed. It won't affect Expedited FA cases; it just focuses on regular Food Assistance. When regular FA (not Ex FA) is being denied in 2 nd , 3 rd month, you won't see the RRR Due Month and an FS-3L won't be generated. FS-3L will be generated if it is rescinded and then they are approved.
If Ex FA is approved for the 1 st month, FA denied for the 2 nd and 3 rd , is the RRR month displayed and is the FS-3L sent or not?	You have two different authorizations happening here. You have Expedited FA which is not encompassed with this project. But then there is regular FA benefits being denied or ongoing benefits being denied in 2 nd or 3 rd month, so the FS-3L will not be sent.
If a case is rescinded, what month will display for the RRR Due Month?	Remember, we only have that certain time frame when we can rescind or re-AI. So, it's going to count either 6-month or 24-month based on the certification period for the household.
What will be the RRR start month be?	Once they are approved for benefits - the month that they are approved for.



Project 11094 - CBMS Cert Period for EX FA

Question	Answer
When the 2 nd month is denied, is the RRR still set? It's Regular FA being denied and Expedited being approved.	It depends on when you're authorizing the denial. If you authorize the approval for EX FA and the denial for regular FA at the same time, you won't have the RRR Due Month displayed. But if it's a situation where you are authorizing EX FA first, and then wait to the next day to authorize the denial for the regular FA, it follows the standard route of how it denies our cases currently.
If they are eligible for EX FA based on client declaration of income, and approved, and then denied for over income after receiving the postponed verification do we establish a claim on the Expedited benefits?	If they have verification that specifically shows the household received more income in the application month and they are correcting the case data entry, then a claim may be established for the benefits issued under expedite criteria if the claim amount meets the threshold guidelines.

Project 11202 - CBMS PEAK Ethnicity/Race Updates

Question	Answer
The pop-up says Head of Household. Is Ethnicity/Race info required for all members?	For Food Assistance, only HoH is required. Other programs require Ethnicity/Race for all members.
When is the pop-up message to complete Ethnicity/Race info going to happen? Data conflicts? Wrap Up?	It will appear on the Ethnicity/Race Detail page when you are trying to advance forward.
If you don't go to the Ethnicity/Race Details page is there no reminder?	If you jump around in Interactive Interview, there is the existing data conflict that will display saying the Ethnicity/Race info is missing. That logic has not changed with this project.
For PEAK change report form or RRR started for MA only but case is open/ongoing for FA. Will it still take out the option of Other/Unknown?	Other/Unknown will be available or displayed only if there is MA attached to the case. If it is a FA only case, Other/Unknown will not be an available option.
What race is Hispanic/Latino?	They are using the value of Hispanic/Latino as an ethnicity identifier, not a race identifier.
So, if Hispanic/Latino is checked, then Race is not required?	The process for collecting race and ethnicity data has not changed with this project. For further questions, contact cdhs_foodstamp_policy@state.co.us

Will clients be required to answer Ethnicity/Race on PEAK?	There will be message on PEAK that will pop-up for customers if that information was not captured for Head of Household.
If client refuses to answer Ethnicity/Race question, what do we to do?	The process for collecting race and ethnicity data has not changed with this project. For further questions, contact cdhs_foodstamp_policy@state.co.us
If the person refuses to answer, we were told at a recent state training to guess the race.	The process for collecting race and ethnicity data has not changed with this project. For further questions, contact cdhs_foodstamp_policy@state.co.us
Are we supposed to update old cases?	If Ethnicity/Race sections for HOH are not completed on the Ethnicity/Race Details page, you'll get an error message telling you to update that case. If Ethnicity/Race was completed, it'll be mapped over to the new options on that page.