Overview

This document provides a step-by-step process for how to complete the data entry of Retroactive Medical Assistance, also referred to as Retro Med. There are 2 pages that should always be addressed when adding Retro Med to a case; the Retro Information Page and the Medical Expense page. This process will outline the steps needed on both. In addition to those 2 main pages, it is important to note that when Retro Med is requested and there is income being reported and received during the retro months, the income pages should be completed with declared representative income during the period.

Process: Retro Information Page

1) Log into CBMS
2) Navigate to the Case by entering the Case Number in the Global Search bar on the Home Page
3) Click on Case Number in the results table to access the Members page
4) From the Members page, hover over the Actions button
5) Select Begin Interactive Interview to initiate the II queue
6) On the Case Questions page, be sure the ‘Yes’ radio button is selected for Does anybody have expenses
   a) Selecting No will not populate the Expense page in the Interactive Interview (II) queue
7) Navigate to the Retro Information page
   a) All current and previous MA applications will be listed
8) Click on the current application date
   a) The related lists will be displayed to the right
9) Click on Retro Information
10) Click the plus (+) sign in the blue header
    a) A new pop-up window will appear
11) Click on the month that the member is requesting Retro coverage for
    a) This will highlight the month
    b) Click the arrow pointing right found in between the boxes
    c) This action moves the requested month from the left box to the right box
12) Repeat step 11 until all of the months being requested are in the right box
    a) If a month is moved by mistake, highlight the month in the right box and click on the arrow pointing left.
13) Click Save
Process: Medical Expense Page

1) From the Interactive Interview (II) queue, navigate to the Expense page
2) From the Name drop-down, select the person requesting Retro Med coverage
3) Click on the Medical Expense tab
4) To add a new record, click the plus (+) icon
   • A new pop-up window will appear
5) Enter the Effective Begin Date
   • This is the first day of the month of the retro month that is being requested
6) Enter the Effective End Date
   • This is the last day of the month of the requested retro month
7) Enter the appropriate Expense Type
   • If not provided, select Medical
8) Select the appropriate Frequency from the drop-down
9) Enter the Date of Service
   • If not provided, enter the first of the retro month requested
10) Select the appropriate Verification option from the drop-down menu
11) Select the appropriate Source option from the drop-down menu
12) Click Save

Repeat the above steps for each separate month being requested.

Note: If multiple members are requesting Retro Med, repeat the above steps for each month being requested for each member requesting Retro Med.

Do you have any questions or suggestions regarding this process? Please contact the SDC via email SOC_StaffDevelopment@state.co.us