

Entering Retroactive Medical Assistance

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**

Entering Retroactive Medical Assistance

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



COLORADO

Health Care & Economic Security
Staff Development Center

Release	Version 1.0
July 2020	Page 2 of 2