

**FAMILY MEDICAID SUCCESS FUNCTIONS  
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## FAMILY MEDICAID SUCCESS FUNCTIONS

**STAT SCREEN – FINANCIAL RESPONSIBILITY CODE**

Include all related household members (for example, father of an unborn child, spouse of a non-parent caretaker, etc.) on the STAT screen, including those who are not a part of the AU/BG.

The financial responsibility code must be entered correctly in order for the CAFI and deeming/allocating budgets to be correct.

If during application processing it is determined that an individual(s) originally registered as PN should not/will not be included in the AU/BG, it is necessary to change his/her Financial Responsibility code depending on the case circumstances and relationship. CMD any individuals excluded from the AU.

**Example:** Mom, her spouse, mom's child, and the mutual child of mom's & her spouse apply for LIM. During application processing it is determined that the spouse's income exceeds the LIM limit for an AU of 4. However Mom and her child are potentially LIM eligible. It is necessary to recode spouse as 'ST' to allow for deeming, and recode the mutual child as 'NM'.

If a step-parent is coded as 'ST' in an F22 case, the amount of deemed income will be reflected on the CAFI screen but is correctly excluded from the final budget calculation.

**Example:** Mom, her boyfriend, mom's child, and the mutual child of mom & her boyfriend apply for LIM. During application processing it is determined that the boyfriend's income exceeds LIM limits for an AU of 4. However Mom and her child alone are potentially LIM eligible. It is necessary to recode the boyfriend and the mutual child as 'NM'.

Coding instructions for specific living and budgeting situations and for other SUCCESS workarounds are in the chart below.

IF the function is	THEN complete the following actions:
Coding an SSI recipient	<ol style="list-style-type: none"> <li>1. An adult SSI must be coded as financial responsibility 'NM'.</li> <li>2. An only child who is a SSI recipient must be coded as 'SI' in order for SUCCESS to issue LIM and TMA to his/her parent(s) or adult caretaker relative.</li> </ol>
Coding a Married Minor Living with Parents and a Spouse (minor does not have a child)	<ol style="list-style-type: none"> <li>1. For a LIM application made for a married minor by his/her parents*, both the spouse and parents of the minor are financially responsible for the minor. The spouse of the minor must be coded 'SC', which will allow for deeming from the spouse. The spouse, however, is not included in the LIM AU. The parent(s) of the minor must be coded 'PN', which will include the parent(s) in the LIM AU.</li> </ol>

IF the function is	THEN complete the following actions:
Coding a Married Minor Living with Parents and a Spouse (minor does not have a child) (cont.)	<p>2. For a RSM application, both the spouse and parent(s)* of the minor are financially responsible for the minor. The parent(s) of the minor must be coded 'RP', which will include the parent(s) in the BG. The spouse of the minor must be coded 'SC', which will allow for deeming from the spouse.</p> <p><b>NOTE:</b> This is the only situation in which deeming applies in RSM.</p> <p>3. The spouse is included in the RSM BG but NOT the RSM AU, even if he/she is also a minor. Eligibility for the spouse must be determined under a separate AU/BG.</p> <p>*For a non SSI parent. If the parent is receiving SSI, refer to 'Coding an SSI parent in this chart</p>
Coding a Minor Caretaker (living with parents, minor is not married)	<p>1. For a LIM application made for a minor caretaker by his/her parent(s)*, the parent(s) are financially responsible for the minor caretaker. The parent(s) must be coded 'PN', which will include the parents in the AU.</p> <p>2. For a LIM application made by the parent(s)* of a minor caretaker AND his/her child, and both will be included in the same LIM AU, the minor caretaker's parents must be coded 'PN' as the parent is responsible for the minor caretaker, even though the minor caretaker's parent(s) is not responsible for the minor's child.</p> <p>3. For a LIM application made by a minor caretaker for him/herself and his/her child, and the minor caretaker's parent(s)* are in the home, the minor caretaker's parent(s) are financially responsible for the minor caretaker. The parent(s) must be coded 'PM', which will allow for deeming, however, the parent(s) will not be included in the LIM AU.</p> <p>4. For a RSM child application made for the minor caretaker by his/her parent(s)*, the parent(s) are financially responsible for the minor caretaker. The parents must be coded 'RP', which will include the parents in the BG.</p> <p>5. For a RSM child application made by the parent(s)* of a minor caretaker for the minor caretaker AND his/her child, and both will be included in the same RSM AU, the minor caretaker's parent(s) must be coded 'RP' because they are responsible for the minor caretaker, even though they are not responsible for the minor caretaker's child.</p> <p>6. For a RSM child application made by a minor caretaker for him/herself, and his/her parent(s)* are in the home, the minor caretaker's parents are financially responsible for the minor caretaker and must be coded 'RP'.</p> <p>7. For a RSM child application made by a minor caretaker for his/her child, and the minor caretaker's parent(s)* are in the home, the minor caretaker's parents are NOT financially responsible for the minor caretaker's child.</p>

IF the function is	THEN complete the following actions:
Coding a Minor Caretaker (living with parents, minor is not married) (cont.)	<p>8. For a RSM child application made by a minor caretaker for him/herself AND his/her child, but in separate AUs, and the minor caretaker's parent(s)*s are in the home, the minor caretaker's parent(s) must be coded 'RP' because they are responsible for the minor caretaker, even though they are not responsible for the minor caretaker's child.</p> <p>*For a non SSI parent. If the parent is receiving SSI, refer to 'Coding an SSI parent in this chart</p>
Coding a Minor Caretaker (living with parents, minor is married)	<ol style="list-style-type: none"> <li>1. For a LIM application made for a married minor caretaker by his/her parent(s)*, and the minor's parent(s) and spouse live in the home, both the parent(s) and spouse are financially responsible for the minor. The spouse must be coded 'SC', which will allow for deeming from the spouse, however the spouse is not included in the LIM AU. The parents of the minor must be coded 'PN', which will include them in the LIM AU.</li> <li>2. For a LIM application made by the parent(s)* of a married minor caretaker for the minor AND his/her child, both the spouse and parents are financially responsible for the minor, and the minor and his/her spouse are financially responsible for their child. The minor caretaker's parents must be coded 'PN' because the parent is responsible for the minor caretaker, even though they are not responsible for the minor's child. The spouse of the minor caretaker must be coded 'PN' if he/she is the parent of the minor's child. The spouse of the minor caretaker must be coded 'SC' if he/she is NOT the parent of the minor's child.</li> <li>3. For a LIM application made by the minor caretaker for him/herself AND his/her child, and the minor caretaker's parent(s)* are in the home, the minor caretaker's parent(s) is financially responsible for the minor caretaker. The parent(s) must be coded 'PM', which will allow for deeming, however the parent(s) will not be included in the LIM AU.</li> <li>4. For a RSM child application made for a married minor caretaker by his/her parent(s)*, both the spouse and parents of the minor are financially responsible for the minor. The parents of the minor must be coded 'RP', which will include the parents in the RSM BG. The spouse of the minor must be coded 'SC', which will allow for deeming from the spouse.</li> </ol> <p><b>NOTE:</b> This is the only situation in which deeming applies in RSM. The spouse is included in the RSM BG, but NOT in the RSM AU, even if he/she is also a minor. Eligibility for the spouse must be determined under a separate AU/BG.</p> <ol style="list-style-type: none"> <li>5. For a RSM child application made by a minor caretaker for his/her child, and the minor caretaker's parent(s)* are in the home, the minor caretaker's parents are NOT financially responsible for the minor caretaker's child.</li> </ol>

IF the function is	THEN complete the following actions:
Coding a Minor Caretaker (living with parents, minor is married) (cont.)	<p>6. For a RSM child application made by a minor caretaker for him/herself, and his/her parent(s)* are in the home, the minor caretaker's parents are financially responsible for the minor caretaker and must be coded 'RP'.</p> <p>7. For a RSM child application made by the parent(s)* of a married minor caretaker for the minor AND his/her child, and both will be included in the same RSM AU, both the spouse and parents of the minor are financially responsible for the minor, and both the minor and his/her spouse are responsible for their child. The parents of the minor parent must be coded 'RP' because they are responsible for the minor, even though they are not responsible for the minor's child. The spouse of the minor caretaker must be coded 'RP' if he/she is the parent of the minor's child. The spouse of the minor caretaker must be coded 'SC' if he/she is NOT the parent of the minor's child. <b>NOTE:</b> This is the only situation in which deeming applies in RSM.</p> <p>8. For a RSM child application made by a minor caretaker (as a child) and his/her child and both are to be included in the same RSM case, the minor caretaker's parent(s)* must be coded 'RP' because they are responsible for the minor caretaker, even though the minor caretaker's parent(s) is not responsible for the minor caretaker's child.</p> <p>*For a non SSI parent. If the parent is receiving SSI, refer to 'Coding an SSI parent in this chart</p>
Coding a Non-Parent Caretaker and Spouse	<p>1. For a LIM application made for a child by his/her non-parent caretaker, the non-parent caretaker may or may not be included in the LIM AU, at the discretion of the AU. If the non-parent caretaker IS included in the LIM AU, he/she must be coded 'PN'.</p> <p>2. If the non-parent caretaker IS included in the LIM AU and he/she is married, the spouse of the non-parent caretaker is financially responsible for his/her spouse and must be coded 'SR', even though he/she is NOT financially responsible for the child. If a non-parent caretaker is NOT included in the LIM AU, the spouse, if included on the STAT screen should be coded 'NM'.</p> <p>3. For a RSM application made for a child by his/her non-parent caretaker, the non-parent caretaker may or may not be included in the RMS BG, at the discretion of the AU. If the non-parent caretaker IS included, he/she must be coded 'RP'.</p> <p>4. If a non-parent caretaker IS included in the RSM BG and he/she is married, because the non-parent is included only in the BG and not the AU, deeming is not applicable and the spouse of the non-parent must be coded 'NM'. If the non-parent and his/her spouse have a mutual child included in the RSM AU, both parents must be included in the BG and must be coded 'RP'.</p>

IF the function is	THEN complete the following actions:
Coding a Stepparent	<ol style="list-style-type: none"> <li>1. For a LIM application made for a child by his/her parent, the parent must be coded 'PN'. If the parent is married to the child's stepparent (someone other than the child's biological or legal parent), the stepparent is legally responsible for his/her spouse and must be coded as 'ST' in order for deeming/allocation to occur. If the child's parent and stepparent have a mutual child (half-sibling) included in the LIM AU, both parents must be included in the AU and must be coded 'PN'.</li> <li>2. For a RSM application made for a child by his/her parent, the parent must be coded 'RP'. If the parent is married to someone other than the child's biological or legal parent (stepparent), because the parent is included only in the BG and not the AU, deeming is not applicable and the stepparent must be coded 'NM'. If the child's parent and stepparent have a mutual child (half-sibling) included in the RSM AU, both parents must be included in the BG and must be coded 'RP'.</li> </ol>
Coding an SSI Parent	<ol style="list-style-type: none"> <li>1. For a LIM application made for a child whose parent(s) receive SSI, the SSI parent(s) must be coded 'NM'. If there is no non-SSI parent in the home, and the AU elects to include a non-parent caretaker relative in the AU, the non-parent caretaker must be coded 'PN'. If the non-parent caretaker is married, the spouse must be coded 'SR' because he/she is financially responsible for his/her spouse, even though he/she is NOT financially responsible for the child. If the non-parent caretaker and spouse have a child who is included in the same AU, both the non-parent caretaker and spouse must be coded 'PN'.</li> <li>2. For a RSM application made for a child whose parent(s) receive SSI, the SSI parent(s) must be coded 'NM'. If there is no non-SSI parent in the home, and the AU elects to include a non-parent caretaker relative in the BG, the non-parent caretaker must be coded 'RP'. If the non-parent caretaker is married, because the non-parent caretaker is included only in the BG and not in the AU, deeming is not applicable and the spouse must be coded 'NM'.</li> </ol>
Budgeting GAP Child Support	<ol style="list-style-type: none"> <li>1. If an AU is receiving TANF and LIM, and child support is received, it is budgeted as a GAP payment, but only in the TANF case. SUCCESS does not include it in the LIM case. This can result in an AU receiving LIM incorrectly. This situation will only occur if an AU receives both TANF and LIM. In order to ensure that the LIM is approved correctly, a manual budget must be completed.</li> <li>2. Complete a manual LIM budget using Form 239. Include the GAP payment amount in the budget and give the \$50 child support disregard to the GAP amount. If Form 239 is not available locally, it can be printed locally by accessing Appendix F of the TANF policy manual at: <a href="http://www.odis.dhr.state.ga.us/3000_fam/3390_tanf/MAN3390.doc">http://www.odis.dhr.state.ga.us/3000_fam/3390_tanf/MAN3390.doc</a>.</li> </ol>

IF the function is	THEN complete the following actions:
Budgeting GAP Child Support (cont.)	<ol style="list-style-type: none"> <li>3. Compare the total countable on Form 239 to the LIM income limit for the appropriate AU size. If the AU is under the LIM income limit, DOCUMENT the total countable income amount (including the GAP amount) behind the UINC screen.</li> <li>4. If the AU is over the LIM income limit, DOCUMENT this behind the STAT screen and CMD to the appropriate class of assistance.</li> </ol>
Coding for TMA and 4MCS cases	<ol style="list-style-type: none"> <li>1. When a LIM case trickles to either TMA or 4MCS, the MISC screen in SUCCESS needs to be correctly coded in order for the AU to receive the correct notice that states they are eligible for extended Medicaid benefits. Correct coding is also required in order for SUCCESS to properly count the number of months that the AU is eligible to receive the extended benefits, and to correctly set the next MA review date.</li> <li>2. Code the “Extended Start Dt” field with the 1<sup>st</sup> month that the AU is eligible for TMA or 4MCS. This will automatically sent the next review date to the proper month.</li> <li>3. Code the “MA COA Cor” field with a “Y” so the system will send out the correct notice. Please note that if the “Y” is not entered within 30 days of the system trickling to TMA or 4MCS, an alert will be generated to remind the worker to review the AU for continued eligibility under this COA. If this field has not been populated with a “Y” when SUCCESS is ready to send the first QRF, it will automatically enter a “Y” in the field. However, the AU will not receive the correct notice of eligibility for extended Medicaid benefits.</li> </ol>
Coding for LIM EMA cases with all Undocumented Aliens	<ol style="list-style-type: none"> <li>1. Currently SUCCESS does not allow an EW to process a LIM EMA application if all household members are undocumented aliens. If an EW attempts to process these cases with everything coded correctly, SUCCESS will deny the LIM for having no eligible members. In order to process these cases correctly, specific coding must be completed on the STAT screen.</li> <li>2. Code one of the children as ‘SI’ in the financial responsibility field on the STAT screen. SUCCESS will read this as having an SSI child in the household, and will allow the LIM EMA to be approved.</li> <li>3. Thoroughly document behind the STAT screen that this workaround has been done so that anyone reviewing the case knows that the ‘SI’ coded child is not actually an SSI recipient.</li> </ol>

IF the function is	THEN complete the following actions:
Removing an Enumeration Sanction	<ol style="list-style-type: none"> <li>1. In order to remove a previous enumeration sanction at application, the application must be finalized before attempting to remove the sanction.</li> <li>2. Once the application is finalized, go in under “R” (interim change) and change the financial responsibility for the sanctioned individual from ‘SA’ to ‘PN’.</li> <li>3. Remove the 258 code from the individual’s line and enter a penalty end date that is prior to the application date. Follow these steps for each individual month, including intervening and ongoing months.</li> <li>4. In cases where the reduction in AU/BG size due to the sanctioned individual causes the case to trickle to another COA, a “dummy” child needs to be added to the case prior to finalization. Add a child called “unborn” with a fictitious DOB and finalize the case as normal. In “R”, follow the steps above to remove the sanction, remove the “dummy” child and confirm the changes.</li> <li>5. To remove a sanction on an active case, go in under “R” and change the financial responsibility for the sanctioned individual from ‘SA’ to ‘PN’.</li> <li>6. Remove the 258 code from the individual’s line and enter a penalty end date prior to the current benefit month. Confirm the changes and the sanction will be removed.</li> </ol>
Processing Overdue Reviews	<ol style="list-style-type: none"> <li>1. Using option “R”, process the overdue review that has been initiated.</li> <li>2. When finalizing the review, the review end date will move up 6 months. If the review is now current, you are done. If the end date is still overdue, proceed to step 3.</li> <li>3. Close case ongoing with reason 552, and override the SUCCESS notice on the CAFI screen.</li> <li>4. Using option “M”, reinstate the case for the ongoing month.</li> <li>5. Using option “R”, process the review as in step 1.</li> <li>6. Finalize the review. Continue following these steps until the review date is current. Make sure to always override the SUCCESS notice when closing the case to avoid any confusion on the part of the a/r. These steps can and should all be done the same day. There is no need to allow for a batch cycle in between.</li> </ol>



Processing Overdue Reviews (cont.)	The worker should document behind NARR that the overdue review is being completed. Documentation on all other SUCCESS and REMA screens should reflect the most current information obtained from the a/r. If the worker does not have current information, a verification checklist should be sent requesting any required information or verification.
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