

## MEM – Medical Exemption Processing

### Purpose:

This procedure explains how to process Medically Exempt requests.

### Identification of Roles:

Unit Lead

### Performance Standards:

Standards not yet identified at the time of publication.

### Path of Business Procedure:

#### Accessing the Medically Exempt Logging Queue

Step 1: In OnBase Workflow, find the 'MEM06 – Medically Exempt' work queue and in the dropdown menu, click on 'MEM06 – Logging'

- a. In the frame below the work queues is a list of forms that require logging. There are two types of forms (see the Medically Exempt Referral Logging Desk Guide for further information):
  1. MEM Medically Exempt Referrals
  2. MEM Medically Exempt Responses
- b. Click on one of the document names to begin working it

#### Medically Exempt Referral Logging Queue Process

Step 1: Access the Medically Exempt Logging Queue (See Accessing the Medically Exempt Logging Queue)

Step 2: Make sure that the document type is Medically Exempt Referral

- a. If it is not a ME Response, see the *Medically Exempt Indexing Error Process for Logging Error Type 1*
- b. If it does match, go to step 3

Step 3: Click through each page of the document using the green triangles in the toolbar. Does it appear that it is only one document?

- a. If it is more than one document, see the *Medically Exempt Referral Indexing Error Process for Logging Error Type 2*

**HINT:** The Medically Exempt Referral has 4 pages (and may have an additional release of information page), excepting blanks and fax cover sheets

- b. If it is one document, go to Step 4

Step 4: Type the SID from the Medically Exempt Referral form into File 10 of MMIS to confirm that the SID belongs to the Member Name on the Medically Exempt Referral

- a. If it does not, notate the document using a note and indicate the correct SID
- b. Once the correct ID is identified, go to Step 5

Step 5: Access IMPA

Step 6: Access the correct survey option

- a. Choose the Interviewer option 'Medically Exempt Referral' option for the available interview

Step 7: Complete the ME Referral Survey in IMPA

- a. Enter the SID and click 'Start'
- b. Click 'Next'
- c. Re-enter the member's SID and click 'Next'
- d. Enter the member's person information
  1. For address, please indicate 'on file'
  2. If there is no phone number, enter 000-000-0000'
- e. Enter the member's personal information
  1. If there is no cell phone number, enter 'non'
  2. Enter the date of birth using slashes. When complete, hit the 'enter' key to make the pop-up calendar go away
  3. Enter the member's county by name (not number)

Step 8: Answer each question on the survey in IMPA. If a question is not answered, make sure to select 'Not Applicable'

- a. Question 7 asks for documentation of limitations to Activities of Daily Living. If there is documentation, indicate, 'See document on file'

Step 9: For each of the field on the last page of the Medically Exempt Referral, make sure to enter the information into the appropriate field in IMPA

- a. **HINT:** Sometimes the Agency and the Provider fields will be combined on one line. That is ok. Just ask for help to determine which information goes in what field
  1. If the Provider NPI is not entered or has less than 10 digits: Enter 10 zeroes (0000000000)
  2. If there is no telephone number: enter 'none'
  3. If there is no e-mail enter 'NONE'
- b. The OnBase documentation is not complete for a Medically Exempt Referral unless the form is **signed by the provider** and certification box is checked
  1. Once you check the certification box and click the 'Next' button in IMPA, you have completed the Medically Exempt Referral Entry in OnBase
- c. If the form was not complete, add a note that indicates which pages are missing and go to Step 10

- d. If the form is complete, go to Step 11

#### Step 10: Incomplete Form Process

- a. Click the 'sticky note icon from the menu bar
- b. Click the 'General Memo Note' option
- c. On the note, type, "ME Referral was missing (enter appropriate missing item)"
- d. Once the note is completed, click the 'Back to MEM01' button

**NOTE: Never return e-forms back to MEM01**

#### Step 11: Keywording

- a. Click the 'Enter Keywords' button on the right hand side of the screen
- b. Below the document list on the left of the screen, enter the State ID in the State ID field. The rest of the information should populate
- c. Click the 'submit' button

### Medically Exempt Response Logging Queue Process

Step 1: Access the Medically Exempt Logging Queue (See Accessing the Medically Exempt Logging Queue)

Step 2: Make sure that the document type is Medically Exempt Response

- a. If it is not a ME Response, see the *Medically Exempt Indexing Error Process for Logging Error Type 1*
- b. If it does match, go to step 3

Step 3: Click through each page of the document using the green triangles in the toolbar. Does it appear that it is only one document?

- a. If it is more than one document, see the *Medically Exempt Indexing Error for Logging Error Type 2*
- b. If it is one document, go to Step 4

Step 4: Access IMPA

Step 5: Access the correct survey option

- a. Choose the Interviewer option 'Medically Exempt' option for the available interview

Step 6: Enter the ME Response Survey

- a. Enter the State ID (SID) and click the 'Start' button

Step 7: Complete the ME Response Survey in IMPA

- a. Re-enter the SID and click 'Next'
- b. Enter the member's name
- c. Answer each question on the survey as indicated on OnBase

- d. Once all answers are completed, you will receive the message, "Survey Completed"

**Step 8: Complete Keywording**

- a. In OnBase Workflow, below the document list on the left of the screen enter the SID in the *State ID* field. The rest of the information should populate.
- b. Click the 'Submit' button

Medically Exempt MMIS Screen 10 Queue Process

Step 1: In OnBase Workflow, go to the 'MMIS Screen 10' work queue and select a document

Step 2: Go to File 10 in MMIS and look up the SID

- a. Are they Wellness?
- b. Are they currently eligible?
- c. If they are not Wellness or are not currently eligible, go to Step 6
- d. If they are Wellness and currently eligible:
  - i. Is there an 'S1' in the 'BP/MF' field?
    - i. If yes, go to Step 3 to see if ME letter has already been sent
    - ii. If there is not an 'S1' in the 'BP/MF' field, press the 'No S10 Flag' button in OnBase

Step 3: To determine if a current ME letter exists in OnBase, open a custom query

- a. Choose the 'File' menu
- b. Choose 'Open' option
- c. Choose 'Custom Query'
- d. Once you have the 'Custom Query' window open, you will need to choose: 'MEM – Lookup by SID/Case Number'
- e. Go to Step 4

Step 4: Look for a document called, "MEM Medically Exempt Accepted Letter – (recent date) – (SID number) – (Member Name)

- a. Open the document and check the Medically Exempt effective date
- b. If a letter with a recent ME effective date exists, go to Step 5
- c. If no ME Exempt Letter exists, press the 'No S10 Flag' button

Step 5: Press the 'Done – Not Complete' button

- a. A dialog box will pop up underneath the document
  - a. Choose the option 'Already ME'
  - b. Enter the ME effective date
- b. You are done with this document

Step 6: If the member is not Wellness or MPC:

- a. Press the 'Done – Not Complete' button

- b. A dialog box will pop up underneath the documents
- c. Choose the option 'Not Wellness'
- d. If the member recently become ineligible:
  - i. Add a note on the document by clicking on the sticky note icon on the menu bar
  - ii. Choose the 'MEM Keyword Research Note' option
  - iii. Type "member not currently eligible" on the note

### Medically Exempt MMIS System 10 (S1), Screen 7 Queue Process: Entering ME Status in MMIS

Step 1: In OnBase, go to the 'MEM06 – MMIS Screen 7 (S1)' work queue and select a document

Step 2: Go to File 10 in MMIS

- a. Choose Action Code C
- b. Enter the SID
- c. Press the enter key
- d. Press the F7 key
- e. Check the current date
  - i. If the date is before ABC Cut-off date on your calendar, enter the next month.
  - ii. If the date is after the ABC Cut-off date on your calendar, enter the following month
- f. Enter the ME status
  - i. Enter the begin date (as determined by the Cut-off calendar) using the format MMDDYY
  - ii. Enter the end date as 999999
  - iii. Enter "S" under 'BNFT PLAN'
  - iv. Enter "1" under 'MED FRAIL'
  - v. Press enter twice to complete status change
- g. Go to Step 3

Step 3: In OnBase, click the 'Scoring True' button

- a. A dialog box will appear right below the documents that you are working. Click the 'Yes' button
- b. Go to Step 4

Step 4: Another dialog box will appear, asking you to choose the effective date.

- a. Select the button that fits with the effective date that you entered
- b. Press 'Submit' and process is done

### Medically Exempt MMIS System 10, Screen 7 (2) Queue Process: Entering ME Denial Status in MMIS

Step 1: In OnBase, go to the 'MEM06 – MMIS Screen 7 (S2)' work queue

Step 2: Go to File 10 in MMIS

- a. Choose Action Code 'C'
- b. Enter the SID
- c. Press the enter key
- d. Press the F7 key
- e. Check the current date
  - i. If the current date is before ABC Cut-off date on your calendar, enter the next month
  - ii. If the current date is after the ABC Cut-off date on you calendar, enter the following month
- f. Enter the ME status
  - i. Enter the begin date (as determined by the Cut-off date calendar) using the format MMDDYY
  - ii. Enter the end date as 999999
  - iii. Press the tab button to move past the 'BNFT PLAN' field
  - iv. Enter "2" under 'MED FRAIL'
  - v. Press enter twice to complete status change
- g. Go to Step 3

Step 3: Click on the 'Scoring True' button

- a. A dialog box will appear right below the documents that you are working. Click the 'Yes' button
- b. You are done with the document

Medically Exempt Pending Queue Process

Step 1: Go to the 'MEM06 – Pending' work queue in OnBase and select a document

Step 2: Go to File 10 in MMIS

- a. Lookup SID
- b. If the member has not been eligible for longer than three months:
  - i. Add a note by clicking the sticky note icon on the menu bar
  - ii. Choose the 'Done Not Complete' not type
  - iii. Enter "Not eligible for 3 months" on the note and enter keywords
- c. If the member is eligible, for the Enter Keywords instructions above

Medically Exempt MMIS Accepted Queue Process

**NOTE: If you find a Medically Exempt Scoring Tool in this queue, please do not work these**

Step 1: Go to the 'MEM06 – MMIS Accepted' work queue in OnBase and select a document

Step 2: Go to File 16 in MMIS and lookup the SID

- a. Make sure that MMIS is updated in File 16
- b. If it is not updated, use the 'ME MMIS Sys 10 (S1), Screen 7 Queue Process' to update the record
- c. Once it is updated, go to Step 3

Step 3: In OnBase, press the 'MMIS Updated' button

- a. Open the Medically Exempt Accepted Letter from the list of documents
  - i. Confirm that the ME begin date matches MMIS. If the ME begin date does not match, fix the ME begin date to match MMIS
  - ii. Check the address to make sure it matches MMIS. If it does not, change it to match MMIS
  - iii. Once the letter matches the ME effective date in MMIS, click the 'Yes' button in the dialog box

**Forms/Reports:**

N/A

**RFP References:**

N/A

**Interfaces:**

OnBase  
MMIS  
IMPA

**Attachments:**

N/A