



Case Structure



Module Learning Objectives:

After completing this module, you will be able to:

- Identify the key differences between IES and legacy cases
- Understand Eligibility Determination Groups, Certified Groups, and participation statuses
- Understand the terms that are different in IES versus in the legacy systems



The lifecycle of an Application & Case

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Application Registration

Application comes in and is registered in the system. Application number starts with a T followed by 8 numbers. After the application is registered, it is still an application.

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Data Collection

As soon as you initiate Data Collection the T in the application number turns to the final digit in the Application Number and it is now a case. During data collection, staff will put all of the required information into IES to determine eligibility.

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Eligibility

Once all of the data has been collected and verified, staff is able to run eligibility.

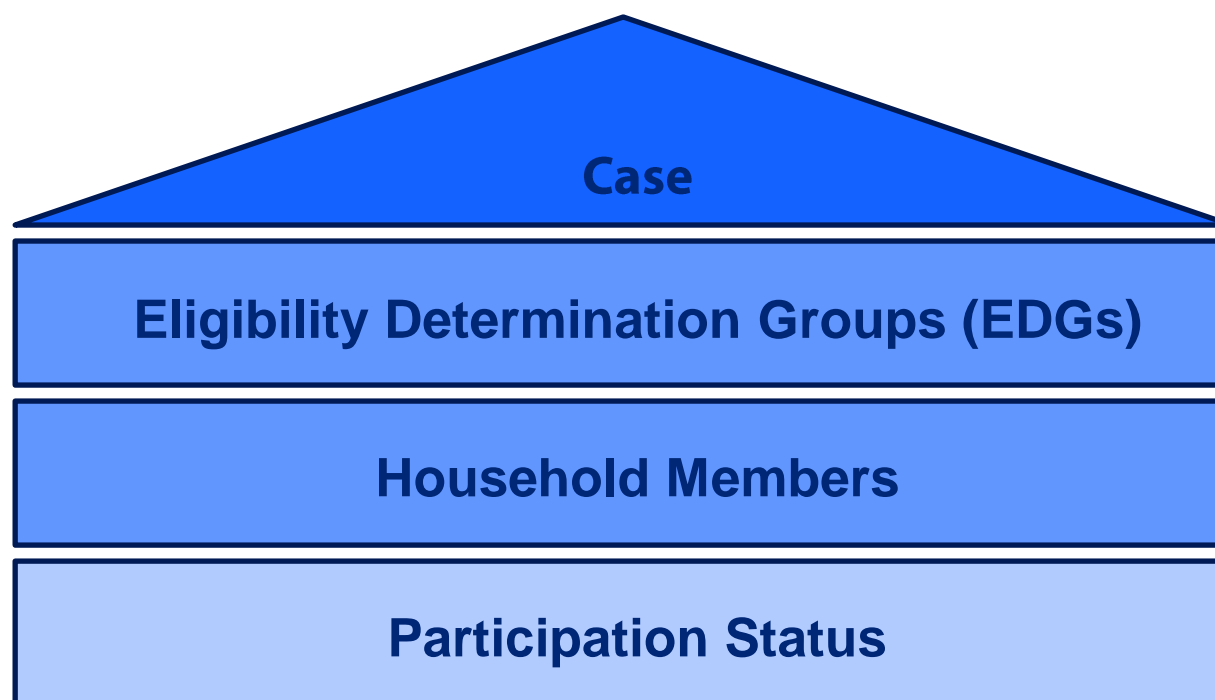
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Certification

Once eligibility has been established, the EDG must be certified to be sent to the CDB and to receive benefits.

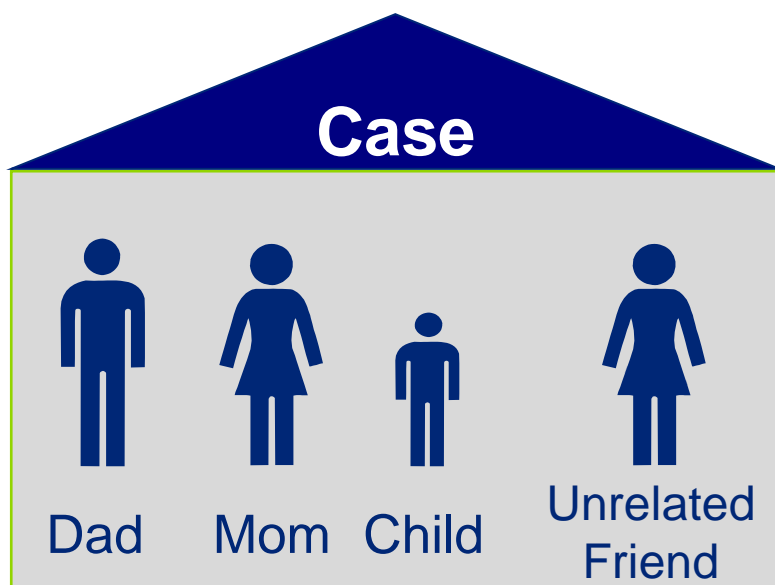
Basic Case Structure

- One case can have multiple programs on it (Cash, SNAP, Medical)
- Different programs are broken out into Eligibility Determination Groups
- Household members are present in each EDG
- Each household member has a participation status for each EDG



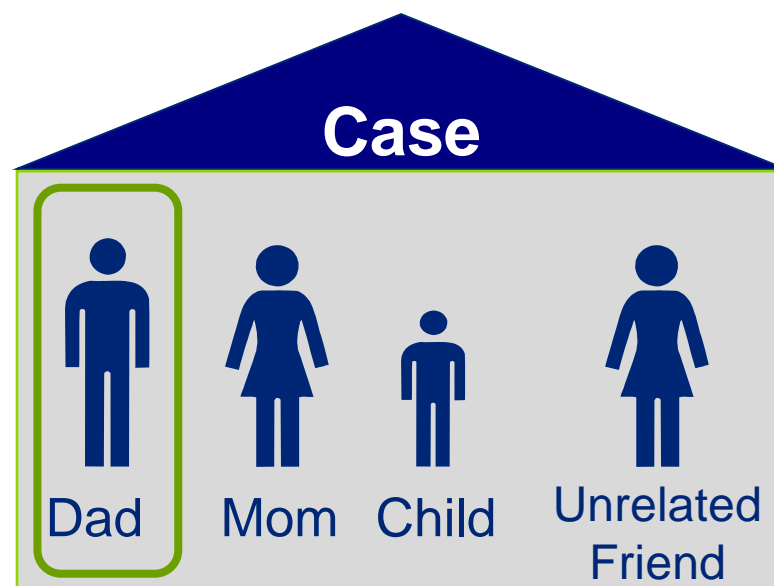
An IES Case

- Includes every member of the household, regardless of whether or not they are requesting assistance
- Similar to the “Household” concept in AIS/ACM



Head of Household (HOH)

- Similar to “Payee” from AIS/ACM
- The “Payee” from AIS/ACM will be converted to the HOH in IES
- The primary person responsible for the case
- May or may not be requesting assistance

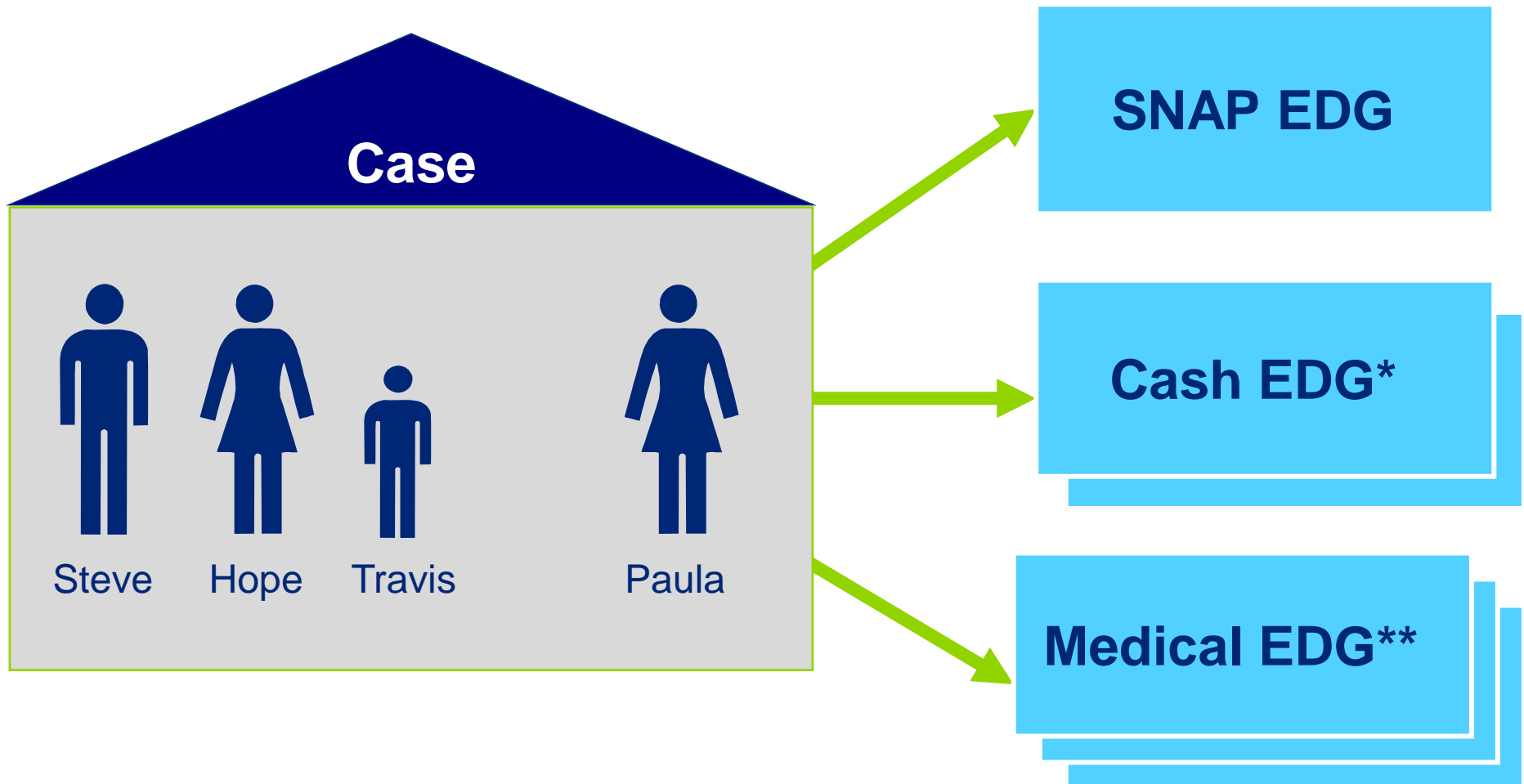


Eligibility Determination Group (EDG)

- An individual or group of individuals whose assets, income, deductions, and needs are considered together when determining eligibility for a specific program.
- Similar to “Benefit Unit” from the legacy systems
- Automatically created by IES based on the case members’ individual information and relationships to one another.



At least one EDG is created for each requested program



** There can be more than one Cash EDG per case*

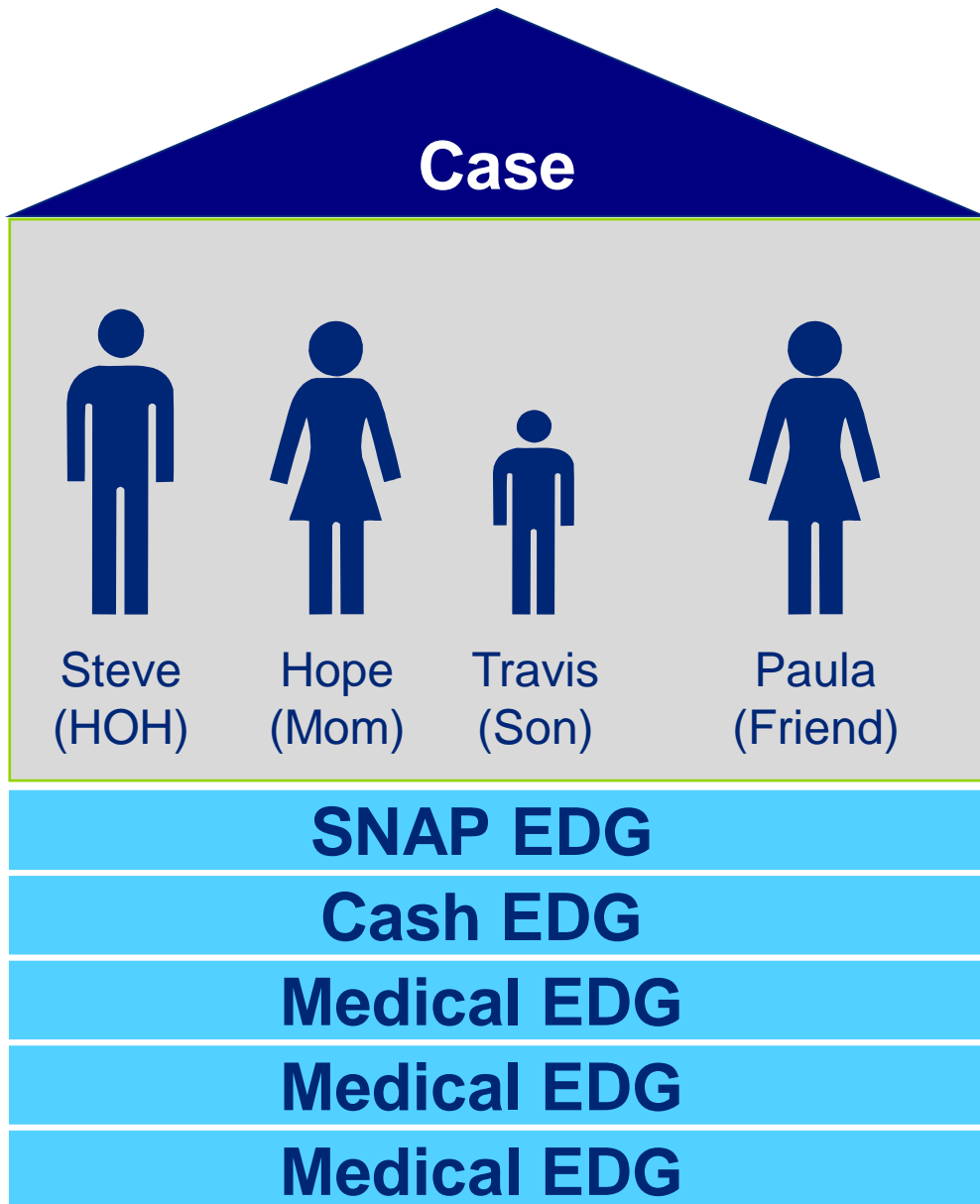
*** Medical will have an EDG for every individual on the case requesting medical*

EDG Rules

1. EDGs are always created if the program is requested
2. There can **ONLY** be one SNAP EDG per case
3. There can be multiple Cash EDGs per case
4. But, there can **ONLY** be one TANF Cash EDG per case
5. There **ALWAYS** will be one medical EDG per person requesting medical assistance.

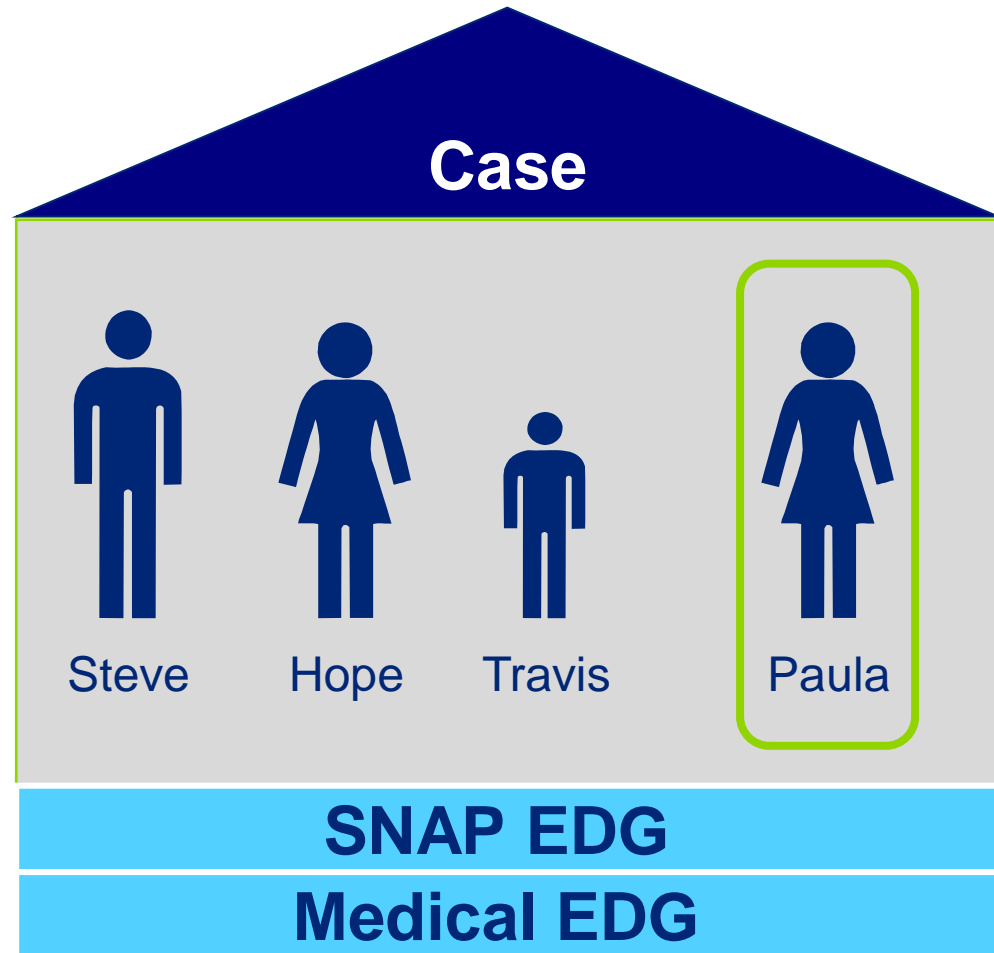
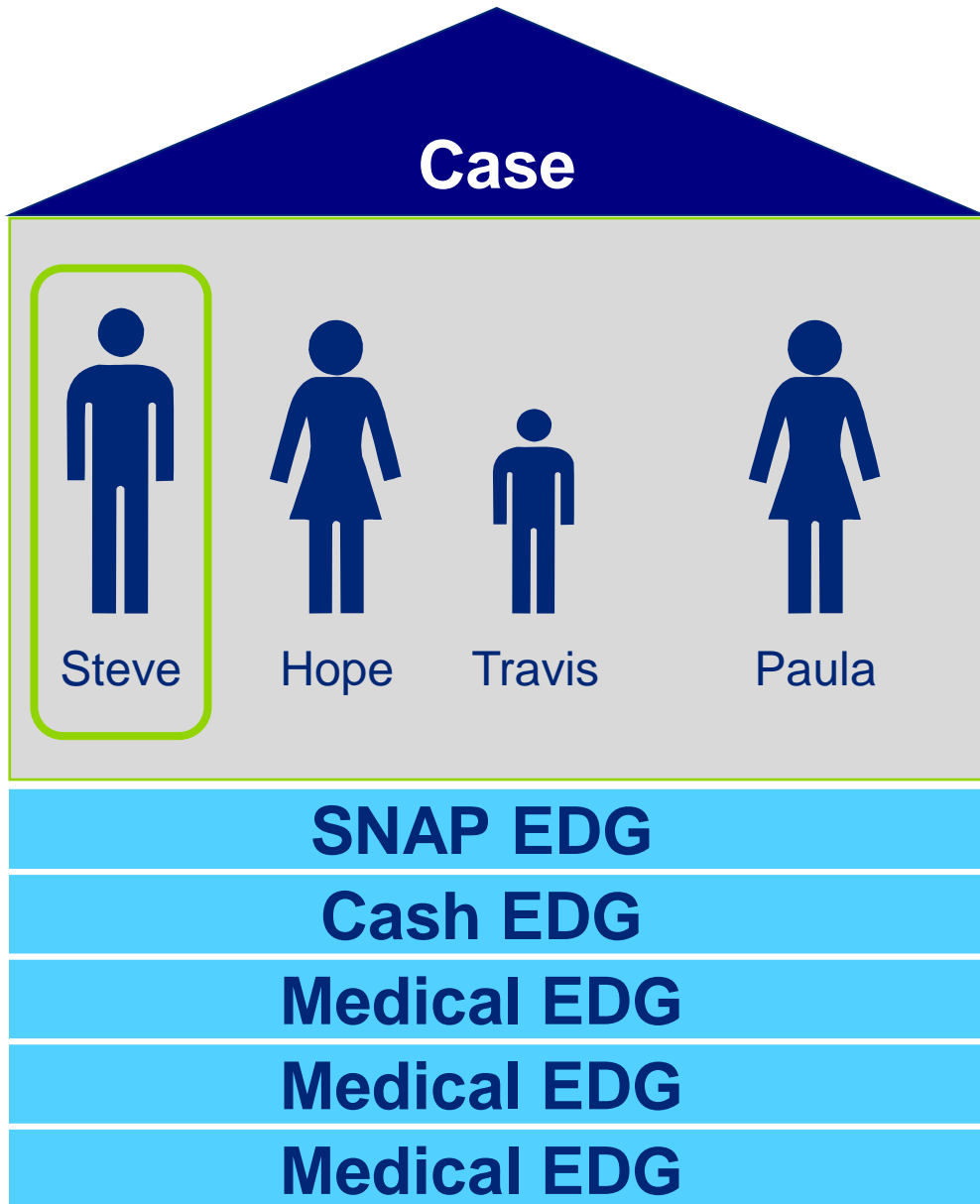


Scenario 1



- Steve, his wife Hope, and their son Travis request all three programs (Cash, SNAP, Medical)
- Hope's friend Paula is currently living in the household
- Paula is not requesting assistance

Scenario 2 – Paula requests SNAP and Medical



Types of Assistance (TOA) by Program (Cash, SNAP, Medical)



Each EDG is named after the Type of Assistance that the EDG is eligible for.

SNAP EDGs

SNAP

Cash EDGs

TANF

AABD Cash

RRP Cash

Medical EDGs

QMB

AABD

HBWD

QI1

DAC

1619

FamilyCare

AK Share

AK Prem1

LTC SLF

LTC NH

DoA

All Medical Program Types of Assistance

Non-MAGI Medical

Type of Assistance	Eligibility Screen Display
QMB	QMB
SLIB	SLIB
QI-1	QI1
Widower	Widower
DAC	DAC
LTC – Supportive Living Facility	LTC SLF
LTC – Department on Aging	DOA
LTC – Nursing Home	LTC NH
AABD Community	AABD Med
AABD Spenddown	AABD SPD
LTC Spenddown	NH SLF SPD
HBWD	HBWD
1619	1619



MAGI Medical

Type of Assistance	Eligibility Screen Display
Parent / Caretaker	FamilyCare
Children	AK Assist
Pregnant Women	Pregnant
Adults	ACA Adult
Newborns	M&B Newborn
Transitional Medical	Med Ext
All Kids Share	AK Share
All Kids Premium Level 1	AK Prem 1
All Kids Premium Level 2	AK Prem 2
Former Foster Care	ACA FMR FC
Family Health Spenddown	Family SPD



Participation Status

- Each household member has one Participation Status for each EDG
- Participation Status shows how an individual's information is used for the EDG

Participation Status	Definition
Eligible Adult (EA) Eligible Child (EC)	Eligible - income, assets, and needs may be considered when determining eligibility for the EDG.
Other Adult (OA) Other Child (OC)	Ineligible - income, assets, and needs may be considered when determining eligibility for the EDG.
Excluded Adult (XA) Excluded Child (XC)	Ineligible and excluded from participation in the EDG - income, assets, and needs are not considered when determining eligibility for the EDG.

Medical EDG Breakdown

- Remember Rule 5 – one medical EDG per person requesting medical assistance
- Each person has their own medical EDG. If approved only ONE Eligible Adult or Child in each EDG
- See below for a depiction of the medical EDGs of the family we have been discussing:

	TOA	Steve	Hope	Travis
Medical EDG	FamilyCare	EA	OA	OC
Medical EDG	FamilyCare	OA	EA	OC
Medical EDG	AK Assist	OA	OA	EC

Scenario 1 - Revisited

- Steve, his wife Hope, and their son Travis request all three programs (Cash, SNAP, Medical)
- Hope's friend Paula is living in the house but not requesting assistance
- See below for a depiction of the family we have been discussing:

			Participation Status				
		EDG Type	TOA	Steve	Hope	Travis	Paula
1 Case		SNAP	SNAP	EA	EA	EC	
		Cash	TANF	EA	EA	EC	XA
		Medical	FamilyCare	EA	OA	OC	OA
		Medical	FamilyCare	OA	EA	OC	OA
		Medical	AK Assist	OA	OA	EC	OA

Certified Group (CG)

- The CG for an EDG is simply the number of Eligible individuals in that EDG (Participation Status of EAs or ECs)
- Three family members are Eligible for both Cash and SNAP, both of those EDGs have a CG of 3
- Medical EDGs only have one Eligible individual, the CG for ALL medical EDGs is always 1

			Participation Status				
		EDG Type	TOA	Steve	Hope	Travis	Paula
1 Case		SNAP	SNAP	EA	EA	EC	
		Cash	TANF	EA	EA	EC	XA
		Medical	FamilyCare	EA	OA	OC	OA
		Medical	FamilyCare	OA	EA	OC	OA
		Medical	AK Assist	OA	OA	EC	OA



IES Eligibility Results: Screen Shots

This scenario is the same as our scenario minus the Cash request. Three person case with a Mom, Dad and Child

- All individuals are requesting SNAP and Medical

▶ EDG Name	▶ TOA	▶ Benefit Period	▶ Benefits/SPD	▶ CG Size
Hope 38F	FamilyCare	05/01/2014 - 05/31/2014	0.00	1
Hope 38F	FamilyCare	06/01/2014 -	0.00	1
Steve 44M	FamilyCare	04/01/2014 - 04/30/2014	0.00	1
Steve 44M	FamilyCare	05/01/2014 - 05/31/2014	0.00	1
Steve 44M	FamilyCare	06/01/2014 -	0.00	1
Travis 4M	AK Assist	04/01/2014 - 04/30/2014	0.00	1
Travis 4M	AK Assist	05/01/2014 - 05/31/2014	0.00	1
Travis 4M	AK Assist	06/01/2014 -	0.00	1
Steve 44M	SNAP	04/24/2014 - 04/30/2014	115.00	3
Steve 44M	SNAP	05/01/2014 - 05/31/2014	497.00	3

Rules When Multiple Cases are Needed in IES

1. 2 (or more) non-married adults that are 18 and over, requesting Medicaid and/or Cash and one is claiming the other(s) as a tax dependent.
2. Any situation where the requestors on the case have different Medical EDG sizes and/or different countable income amounts.
3. Husband/wife – One or both are receiving LTC services and supports (nursing home, supportive living program or DoA).
4. A person on the case was previously eligible for FamilyCare or Moms & Babies for pregnant women and is no longer eligible. There is also a child approved on the case and is continuously eligible.



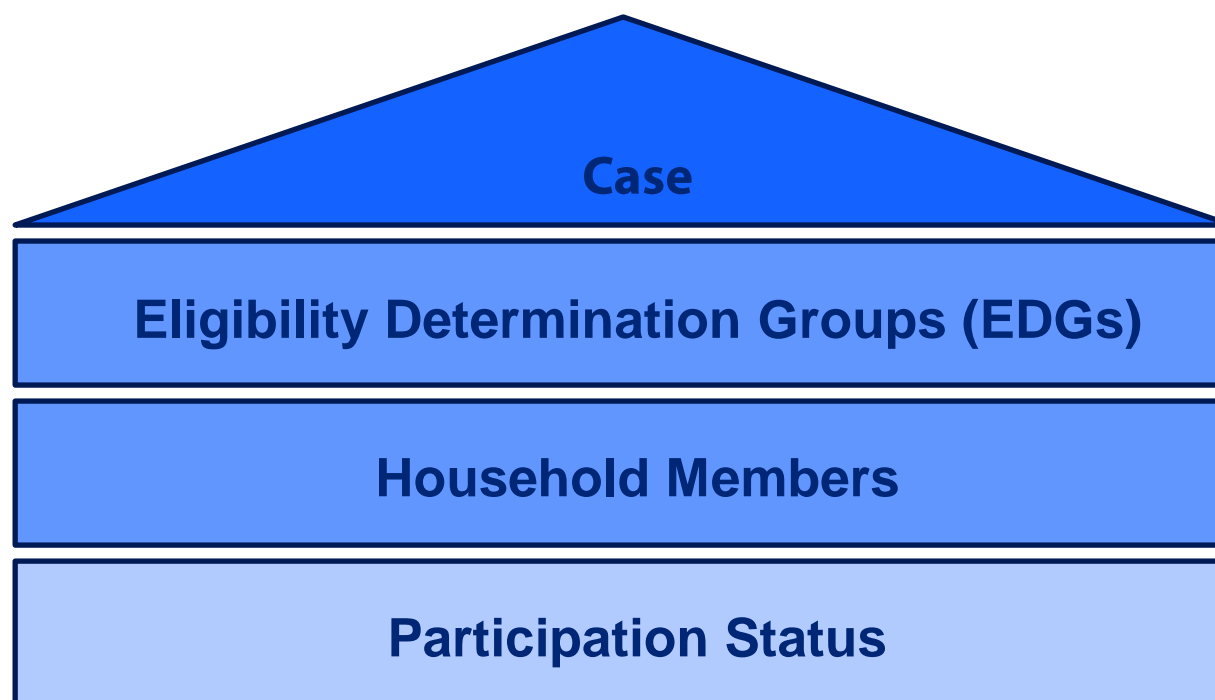
Rules When Multiple Cases are Needed in IES Continued

5. 2 or more people on a case, and the HOH is requesting AABD (could be spenddown or HBWD), and a second person is receiving ACA Adult, HBWD or FamilyCare (FH).
6. Any person qualifying for Former Foster Care Medicaid should be on their own case.
7. Cases with children in the household that qualify for different CHIP (SHARE, Premium 1 or Premium 2) programs.
8. Households qualifying for the following combination of programs:
 - ASSIST and CHIP
 - ASSIST and ACA Adult
 - CHIP and ACA Adult



Case Structure

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NEXT STOP

