

2010

Client Services Version 6.1 - ProviderOne Search Tool

By the end of this training staff will have:

- Reviewed adjunctive eligibility and documentation requirements.
- Identified how the ProviderOne Services Card impacts WIC's adjunctive eligibility assessment and documentation.
- Identified benefits and challenges of the paper medical coupon.
- Discovered how the ProviderOne search tool in Client Services 6.1 will provide WIC staff with the information needed to quickly and accurately assess adjunctive eligibility.

Tools provided in the Appendix:

- Side by side comparison of the medical coupon and the ProviderOne Services Card.
- Flow chart of the ProviderOne search process.
- Managed Care Enrollment Information.
- List of Managed Care Plans.





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DOH 960-202 May 2010

Slide 2

A lesson on the Client Services 6.1 ProviderOne search tool and how to assess for and document adjunctive eligibility.

Why: It is important for staff in busy clinics to be able to quickly and accurately determine adjunctive income eligibility for WIC. The change from paper medical coupons to ProviderOne cards affects WIC adjunctive eligibility assessment and documentation. A ProviderOne search tool has been added to Client Services to give staff the information they need to assess for and document adjunctive eligibility.

What: By the end of this training staff will have:

- Reviewed adjunctive eligibility and documentation requirements.
- Identified how the ProviderOne Services Card impacts WIC's adjunctive eligibility assessment and documentation.
- Identified benefits and challenges of the paper medical coupon.
- Discovered how the ProviderOne search tool in Client Services 6.1 will provide staff with the information needed to quickly and accurately assess adjunctive income eligibility.

Materials Needed:

- Client Services 6.1 – ProviderOne Search Tool – Participant Copy

Reference Materials:

- Washington State WIC Nutrition Program Policy and Procedure Manual: Volume 1, Chapter 3 – Application and Processing Standards
- Washington State WIC Nutrition Program Policy and Procedure Manual: Volume 1, Chapter 6 – Income

Slide 3

ProviderOne is coming!

Have you heard?

ProviderOne is “going live” on May 9, 2010.

It will change the way staff can tell if a person is on a WIC income-qualifying medical program.

Slide 4

What’s ProviderOne and how does it affect WIC?

ProviderOne (sometimes abbreviated as P1) is the new medical program payment processing system for the Department of Social and Health Services (DSHS). With the new system DSHS clients will be issued a ProviderOne Services Card. The **Services Card replaces the current paper medical coupon**. Although the client card is changing, the rules DSHS uses to determine eligibility are not.

This affects WIC because, unlike the paper medical coupon, **the Services Card does not show program eligibility information**. The card only provides the person’s name, ProviderOne ID number, and the date the card was issued. This doesn’t give enough information to determine if the person is on an income-qualifying program that makes him/her income eligible for WIC.

Slide 5

Here’s the good news!

Client Services 6.1 has a ProviderOne search tool so WIC staff will have quick, easy access to the information they need to know if a client is on an income-qualifying program.

There are **no big policy changes**. Only a few things will be different about what is allowed for proof of adjunctive eligibility, income, ID, residency and pregnancy.

Slide 6

What are “Adjunctive Eligibility” and “Income-Qualifying Programs”?

Adjunctive eligibility means accepting a person as income eligible for WIC because the person is eligible for another program. A client is adjunctively eligible when he or she shows proof of current eligibility for **Medicaid, TANF** (Temporary Assistance to Needy Families), **Basic Food Program** and **FDPIR** (Food Distribution Program on Indian Reservations).

These programs are called **income-qualifying** programs because they **make the person income eligible for WIC**. These programs have income guidelines similar to WIC’s.

*See page 2 for a brief overview
of WIC income eligibility*

Slide 7 **WIC Income Eligibility – A Brief Overview**

There are **3 ways** a client can be **income eligible** for WIC:

1. **Traditional income assessment** - The client meets WIC's income eligibility guidelines. The client's household income is at or below 185% of the Federal Poverty Level.
2. **Adjunctive eligibility** - The client is on an income-qualifying program.

Income-qualifying programs:

- **Medicaid - federally funded Title 19 programs** plus **state funded medical programs** with income guidelines that are the same or less than WIC's
 - **TANF** - Temporary Assistance to Needy Families
 - **Basic Food Program** – also known as food stamps
 - **FDPIR** - Food Distribution Program on Indian Reservations
3. **Adjunctive eligibility due to a household member** – The client has a household member on a specific income-qualifying program.
 - The client has a pregnant woman or infant in their household who is on a federally funded Medicaid Title 19 program
 - The client has any household member on TANF, Basic Food Program or FDPIR

Slide 8

Activity:

Which income-qualifying **program is used most often in your clinic** for adjunctive eligibility?

What type of proof of current eligibility **is usually shown** for that program?

Adjunctive eligibility supports coordination between federal programs, promotes clinic efficiency, and prevents barriers to participation in programs with similar income guidelines.

Slide 9 **Proof of Adjunctive Eligibility**

When an applicant or client **shows proof of current eligibility for an income-qualifying program** the person is **adjunctively income eligible for WIC** and **meets WIC’s income documentation requirement**.

The proof must show:

- ✓ Client name,
- ✓ Current eligibility dates and
- ✓ The income-qualifying program.

Slide 10 Recent statistics (listed below) show that about **74%** of Washington WIC clients use **medical coupons** as their **proof of adjunctive eligibility**.

Activity:

What are some of the **benefits** and **challenges** you and your clients have experienced using the **medical coupon** for proof of adjunctive eligibility? Write your thoughts below.

Benefits of the medical coupon	Challenges with the medical coupon

We will learn how the Client Services **ProviderOne search tool will help reduce some of these challenges** WIC staff and clients experience with the current paper medical coupons.

WIC statewide statistics: Number of clients on income-qualifying programs:

Medicaid: 144,756
TANF: 19,152
Basic Food Program: 50,996
FDPIR: 81

Statewide caseload = 194,815

Note: Some client records have more than 1 of these income-qualifying programs marked.

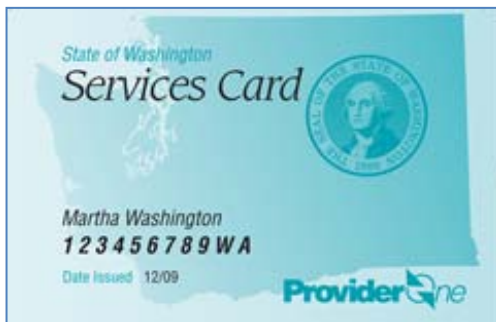
The ProviderOne Services Card

Slide 11 Key things to know about the ProviderOne Services Card:

- The plastic ProviderOne Services Card (or just Services Card) will **replace the paper medical coupon**.
- Only the **person's name, ProviderOne ID and date issued** are shown on the card.
- **Each eligible member of a household** will be issued a Services Card.
- The card will be **issued one time**, not on a monthly basis. It is meant to be permanent. Because of this the person could go through times when he/she is eligible for services and times when he/she is not eligible.
- Eligibility dates, program names, program codes or managed care plans **are not shown** on the card.
- Applicants **receive the card 7 – 10 days after they are approved** for medical, dental or vision care assistance.
- **Managed Care clients** will get a ProviderOne Services card **and** a separate card for their plan. For example a person will have a ProviderOne card and a Molina card, if Molina is their Managed Care Plan. See the Appendix for information about Managed Care Plans.

Slide 12

Having a ProviderOne card does not guarantee that a person is currently eligible for services, or that the person is on a WIC income-qualifying program.



Front of the Services Card



Back of the Services Card

*How will staff find out if a person with a Services Card is currently on a medical program that will make him/her eligible for WIC?
The ProviderOne search tool in 6.1!*

A side-by-side comparison of the paper medical coupon and the ProviderOne Services Card is in the Appendix.

Client Services and ProviderOne Data

Slide 13 Once DSHS's ProviderOne system is up and running:

- **The state WIC office will get ProviderOne data daily** from DSHS and screen the data for WIC income-qualifying programs.
- **WIC clinics will get ProviderOne data** from the state WIC office **only for those people who are eligible for WIC income-qualifying programs.**
- The state will send the WIC income-qualifying ProviderOne data to clinics **daily.**

This process assures that **WIC staff have the most current information available to assess for adjunctive eligibility.**

How does WIC screen the DSHS data?

Some DSHS programs have levels of eligibility within them which have different income eligibility guidelines and funding sources.

This level of detail has not been available to WIC staff before.

The **state WIC office looks** very carefully at the DSHS data and sends only the information for programs **(down to the levels within the program) that would make the client and/or household members eligible for WIC.**

Proof of Adjunctive Eligibility and Client Services ProviderOne Search Tool

Slide 14

*Once Client Services 6.1 arrives in clinics
WIC staff will only be allowed to use the ProviderOne Search Tool
to check for eligibility for income-qualifying medical programs.*

Other ways of getting client medical eligibility that were used in the past do not give the same level of detail needed to identify qualifying medical programs. Once WIC's ProviderOne search tool arrives on May 17, 2010, **these methods of verifying someone's eligibility will no longer be allowed:**

- **Checking on-line** (WAMedWeb or the ProviderOne Portal),
- **Calling the local Community Service Office (CSO),**
- **Using the automated phone system (IVR)**
- **Magnetic card reader**

See page 22 for WIC's transition plan for early May.

The Appendix has a flow chart of the ProviderOne search process.

Client Services ProviderOne Search Tool

Slide 15 **In 3 easy steps, staff can find out if a client is currently on an income-qualifying program:**

1. **Enter the ProviderOne ID** in the field on the Income Documentation tab. This is the 9-digit number from the Services Card. The WA at the end of the number is already entered.
2. **Press the [P1 Search] button.**
3. **Review the Search Results** pop-up window to see if the client is currently eligible.

Slide 16

The screenshot shows the 'Income Documentation' tab of the Client Services ProviderOne Search Tool. The interface includes a table with columns for Cert Date, Assessed, Source, Proof, On File, Amount, Interval, Monthly, and Comments. Below the table are sections for 'Proof of ID', 'Proof of Residency', and 'Proof of Pregnancy', each with a list of document types and a 'Copies on File' field. At the bottom, the 'ProviderOne ID' field contains '101250022WA' and the 'P1 Search' button is highlighted. An arrow points from the 'P1 Search' button to the next slide.

1. **Enter the ProviderOne ID** into the field.

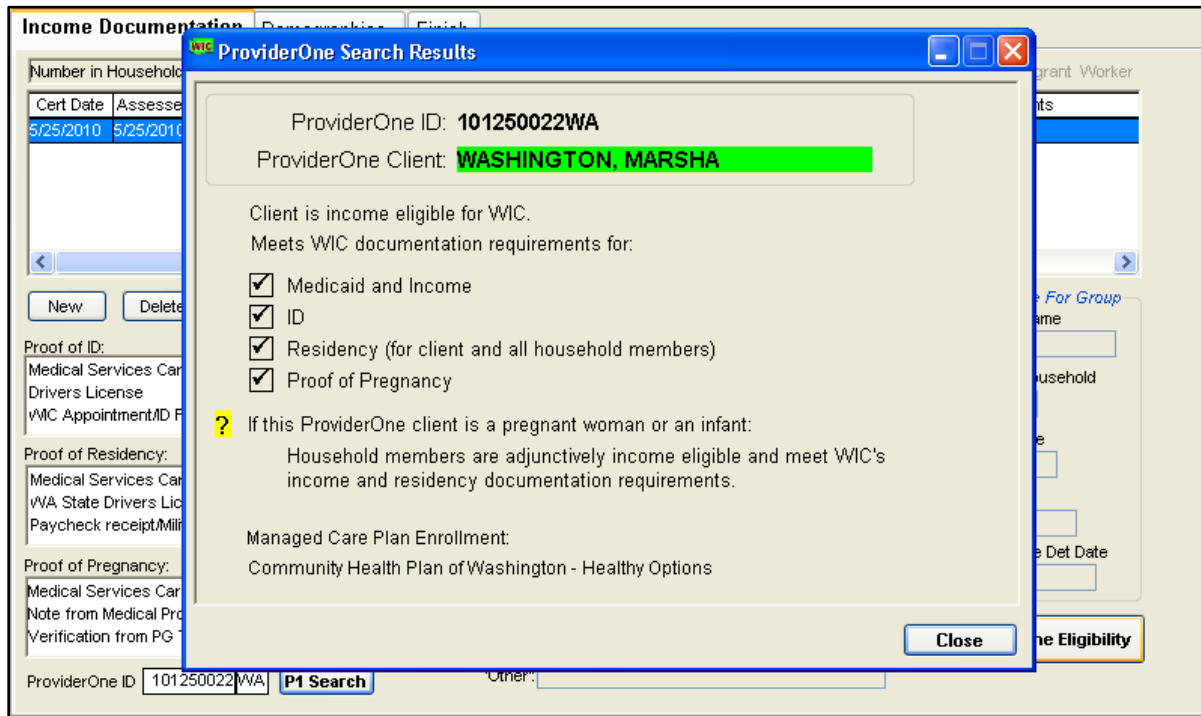
2. **Press the [P1 Search] button.**



3. **Review the results, see the next page.**

Slide 17 **Reviewing the Search Results**

- Slide 18
- ⇒ **Make sure the ProviderOne ID and client name are correct.**
 - ⇒ **Read the information displayed.**
 - ⇒ **See if the ProviderOne client makes other household members eligible for WIC.**
When the P1 client is on a program that makes household members eligible for WIC a message appears. **(Look for the yellow question mark.)**



Slide 19 **Marsha Washington example:** Marsha is a pregnant woman applying for WIC. After you enter her P1 ID and press the [P1 Search] button and the following Search Results come up.

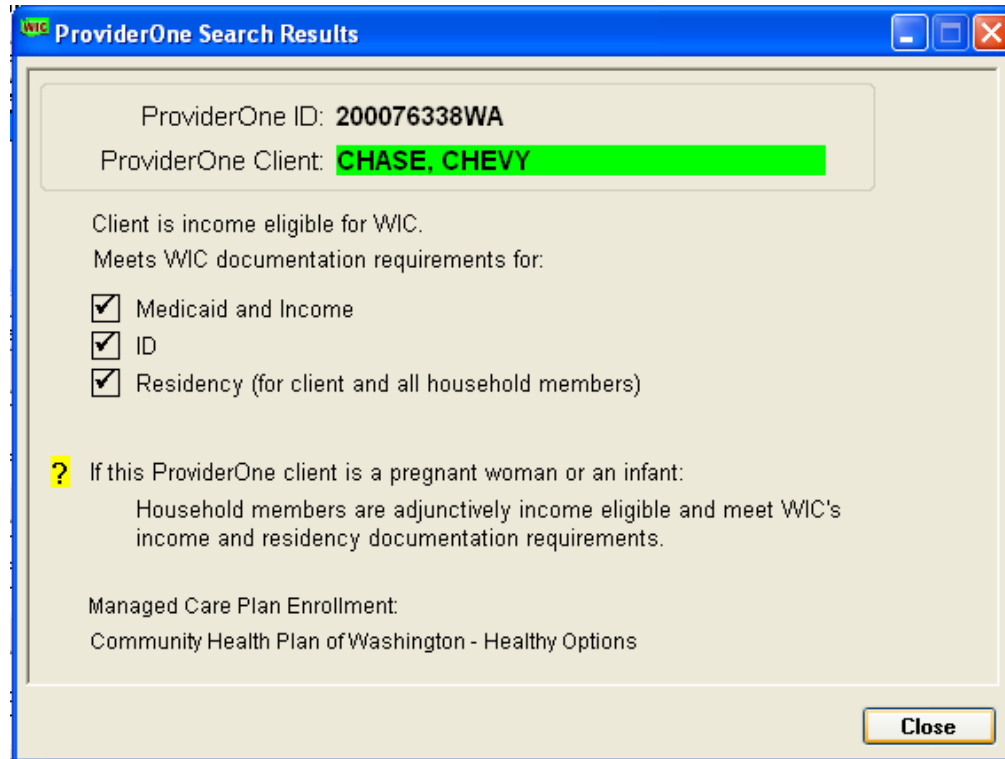
Marsha's Search Results tell you:

- Marsha is income eligible for WIC (she is on an income-qualifying program).
- The Search Results can be used for her proof of:
 - ✓ Medicaid eligibility and Income
 - ✓ ID
 - ✓ Residency
 - ✓ Pregnancy (she is on a program that is for pregnant women only)
- She is on a program that allows her household members to be income eligible. **Clinic staff need to make sure other household members are provided with WIC eligibility only when the ProviderOne client is a pregnant woman or infant.**
- Marsha's **Managed Care Plan Enrollment** information is listed (see the Appendix).

The Search Results will vary depending on the income-qualifying program. Page 10 lists each Search Result message, what it means, what you can mark for proof and why.

A few more examples of ProviderOne Search Results...

Slide 20 **Chevy Chase example:** Chevy is a child applying for WIC. He has a ProviderOne Services Card. You enter the number and press [P1 Search] and the following results display.



Chevy's Search Results tell you:

- He is income eligible for WIC (he is on an income-qualifying program).
- The Search Results can be used for his proof of:
 - ✓ Medicaid eligibility and Income
 - ✓ ID
 - ✓ Residency
- He is on a program that allows household members to be income eligible.

Since Chevy is a child, he does not make other household members eligible for WIC.

See the **Appendix** for information about **Managed Care Plan Enrollment**.

WIC staff need to make sure the P1 client is a pregnant woman or an infant in order to make other household members income eligible for WIC.

The computer does not check for this.

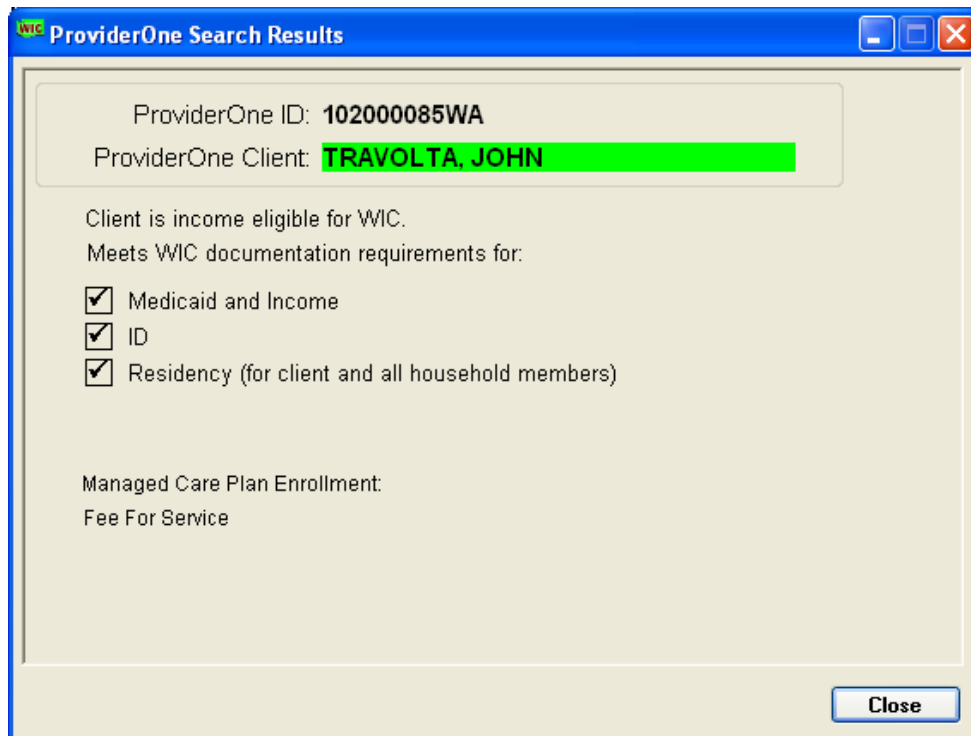
Slide 21

Activity:

John Travolta is an infant, his ProviderOne Search Results are shown below.

What do the Search Results tell you? Place a check mark in your answers:

- John is income eligible for WIC (he's on an income-qualifying program)? Yes No
- The Search Results can be used for his proof of Medicaid/income Yes No
- The Search Results can be used for his proof of ID Yes No
- The Search Results can be use for his proof of Residency Yes No
- He is on a program that makes his household members income eligible Yes No



Slide 22 What John's results tell you:

- He is income eligible for WIC (he is on an income-qualifying program).
- The Search Results can be used for his proof of:
 - ✓ Medicaid eligibility and Income
 - ✓ ID
 - ✓ Residency
- He is not on a program that allows his household members to be income eligible. **Even though John is an infant, his search results don't show the statement about household member eligibility which means the program he is on doesn't allow this.**

Slide 23

Notice how the **Search Results** are **different** for Marsha, Chevy and John **based on the program** they are on?

Slide 24 **ProviderOne Search Results – What the messages mean**

P1 Search Results message	Document on the Income tab	Rationale
Client is income eligible for WIC.	The ProviderOne search result is proof of WIC eligibility.	A person who is currently on an income-qualifying program is income eligible for WIC.
Meets WIC documentation requirements for: <input checked="" type="checkbox"/> Medicaid and Income	Place a check mark in the Medicaid box Enter the self-reported income. Proof of Income – Select: Medical Services Card/ProviderOne	Proof of current eligibility for the income-qualifying program is proof of income eligibility for WIC. (It's like seeing a paper Medical Coupon with current eligibility for an income-qualifying program.)
<input checked="" type="checkbox"/> ID	Proof of ID – Select: Medical Services Card/ProviderOne	DSHS verified ID, so the search result is allowed as proof of client ID (Identification).
<input checked="" type="checkbox"/> Residency (for client and all household members)	Proof of Residency – Select: Medical Services Card/ProviderOne	DSHS verified Washington state residency, so the search result is allowed as proof of residency for the client and all household members.
<input checked="" type="checkbox"/> Proof of Pregnancy	Proof of Pregnancy – Select: Medical Services Card/ProviderOne	This displays when the client is on a program that's only for pregnant women. If this is not listed, staff must see another type of proof of pregnancy.
? If this ProviderOne client is a pregnant woman or an infant: Household members are adjunctively eligible and meet WIC's income and residency documentation requirements.	The ProviderOne client must be a pregnant woman or infant to make household members eligible for WIC. Use the Adjunctive Eligibility (Adj Elig) pop-up window and select the correct statement for household members.	This message displays only when the ProviderOne client is on a federally funded Medicaid program that allows household members to also be income eligible for WIC.
Managed Care Plan Enrollment	No documentation needed.	See the Appendix for more information.

Slide 25 **Documenting proofs in Client Services**

“Medical Services Card/ProviderOne” is a new proof selection.

- It will replace “Medical Coupon” in the **proof areas** of the **Income Documentation tab**.
- It can be used for **proof of pregnancy** when it’s listed in the search results
- Any client history information that listed “Medical Coupon” will now list “Medical Services Card/ProviderOne.”

When the Search Results show the client meets WIC documentation requirements, **the proofs don’t get marked automatically** – but marking them on the Income Documentation tab is easy.

Marking the proofs from the ProviderOne Search Results is easy!

Slide 26 You can keep the Search Results open so you can read the information while you mark the proofs on the Income Documentation tab. Just **move the Search Results box over** to the side **and mark the proof selections**.

Slide 27

The screenshot shows the 'Income Documentation' tab in the Client Services software. The interface includes a table with columns for Cert Date, Assessed, Source, Proof, On File, Amount, Interval, Monthly, and Comments. A search results window is overlaid on the right side, displaying the following information:

- ProviderOne ID: 101250022WA
- ProviderOne Client: WASHINGTON, MARSHA
- Client is income eligible for WIC.
- Meets WIC documentation requirements for:
 - Medicaid and Income
 - ID
 - Residency (for client and all household members)
 - Proof of Pregnancy
- ? If this ProviderOne client is a pregnant woman or an infant: Household members are adjunctively income eligible and meet WIC's income and residency documentation requirements.
- Managed Care Plan Enrollment: Community Health Plan of Washington - Healthy Options

A green arrow points to the search results window with the text: "Search Results moved over so proofs can be selected."

🖱️ **Hold the left mouse button down** while you **move the Search Results over**, then **release the mouse button**. Move the Search Results back over and close when you are done.

Example: Documenting Marsha Washington's information

Slide 28 Notice the following on Marsha's completed Income Documentation tab:

1. The **Medicaid** box is marked because **Marsha is the ProviderOne client** on the income-qualifying program. This will be "unchecked" at each recertification so you can search for her current eligibility and then re-check the box if it applies.
2. Her **proof of income/income eligibility** is "Medical Services Card/ProviderOne"
3. "Medical Services Card/ProviderOne" is marked for her **proof of ID, Residency and Pregnancy**, as listed on her ProviderOne Search Results.
4. Marsha is **income eligible** for WIC.

The screenshot displays the 'Income Documentation' tab with the following details:

- Number in Household:** 4
- Medicaid:**
- Proof Table:**

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
5/18/2010	5/18/2010	Employment	Medical Services Card	<input type="checkbox"/>	\$2,325.25	Monthly	\$2,325.25	
- Total Monthly Income:** 2325.25
- Income Eligible:**
- Proof of ID:** Drivers License, WIC Appointment/ID Folder (Recert Only), Social Security Card
- Proof of Residency:** WA State Drivers License, Paycheck receipt/Military LES, Utility Bill (w/physical address)
- Proof of Pregnancy:** Note from Medical Provider, Verification from PG Test Clinic, Visual Recognition (Later stages only)
- ProviderOne ID:** 101250022 WA
- Calculate Income Eligibility:** Button

Watch a demonstration using the ProviderOne search tool and documenting in Marsha's file at: http://www3.doh.wa.gov/WIC_TRAINING/marshawashingtonexample/marshawashingtonexample.html

Slide 29

Marsha is a pregnant woman on a program that makes her household members adjunctively eligible. We'll see how to document eligibility for her son, George, on the next page.

Example: Documenting adjunctive eligibility for a household member

George Washington – Marsha’s son

Marsha’s son, George, is a child who doesn’t have a ProviderOne card. Marsha is pregnant and her ProviderOne Search Results show that she is on a program that allows household members to be income eligible for WIC as a pregnant woman.

Slide 30 **To document George’s adjunctive eligibility:**

1. **Type Marsha’s number** into the field on George’s Income tab and **press [P1Search]**.
2. **Review** the Search Results and **make sure the ProviderOne client is a pregnant woman or infant**.
3. **Press [Adj Elig]** to open the Adjunctive Eligibility box. **Mark the correct statement** then **press [Ok]**.

3.

Slide 31

The screenshot displays the 'Adjunct Eligibility' dialog box in the foreground. It contains three questions with radio button options:

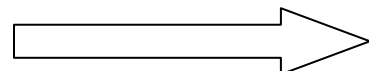
- Yes: Is the applicant a member of a household in which there is a pregnant woman currently certified as eligible for Medicaid?
- Yes: Is the applicant a member of a household in which there is an infant currently certified as eligible for Medicaid?
- Yes: Is the applicant living with a household member who is currently certified as eligible for TANF, Basic Food Program, or FDPIR?

In the background, the 'ProviderOne Search Results' window is visible. It shows the ProviderOne ID as 101250022WA and the client name as WASHINGTON, MARSHA. Below this, it states 'Client is income eligible for WIC. Meets WIC documentation requirements for:' followed by a list of checked items: Medicaid and Income, ID, Residency (for client and all household members), and Proof of Pregnancy. A question mark is placed next to the text: 'If this ProviderOne client is a pregnant woman or an infant: Household members are adjunctively income eligible and meet income and residency documentation requirements.'

1.

2.

Continued on the next page.



4. Enter “Medical Services card/ProviderOne” for **proof of income and residency**.
5. **Review and mark** the client’s proofs (the child’s ID for example).

Slide 32

Watch a demonstration using the ProviderOne search tool and documenting in George’s file at: http://www3.doh.wa.gov/WIC_TRAINING/GeorgeWashingtonexample/GeorgeWashingtonexample.html

Slide 33

Activity:

The table below lists **what is marked in Marsha’s file compared to George’s file**. What stands out to you in this comparison?

Marsha	George
Use Marsha’s P1 ID	Use Marsha’s P1 ID
Mark the Medicaid box	Use the Adj. Elig. pop-up (Don’t mark the Medicaid box)
ID = Medical Services Card/ProviderOne	ID - Need to see George’s ID
Residency = Medical Services Card/ProviderOne	Residency = Medical Services Card/ProviderOne
Pregnancy = Medical Services Card/ProviderOne	Pregnancy - Doesn’t apply

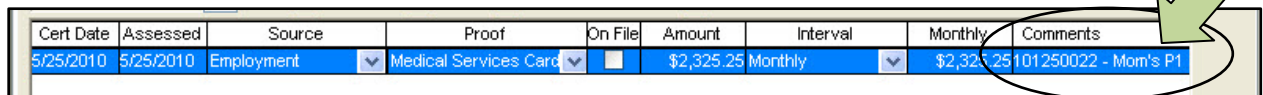
A few more notes about documenting in Client Services...

Slide 34 You can Copy and Paste the ProviderOne ID.

Client Services allows you to copy and paste the ProviderOne ID into the Comments field of the line of income or other places in the client's file. Some clinics may want to put the P1 ID in the comments field for program integrity reasons or clinic policy. **This is not required by state WIC policy.** You can also add a note after the number as shown below. Putting the ProviderOne ID in the income line makes it a permanent part of that line of income.

Copy = Highlight the number and press Control + C

Paste = Control + V



Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
5/25/2010	5/25/2010	Employment	Medical Services Card	<input type="checkbox"/>	\$2,325.25	Monthly	\$2,325.25	101250022 - Mom's P1

Slide 35 **If you enter a number and press the [P1 Search], once you finish the wizard the number saves.** It will display in the ProviderOne ID field and can be **changed** or updated later. If you enter a number and don't search, or if you don't finish the wizard the number will not save.

ProviderOne ID

Slide 36 **Staff can use the saved ProviderOne ID without seeing the Services Card again.**

Just press [P1 Search] to search for current eligibility at the recertification appointment. Make sure the Search Results show current eligibility and the P1 ID and name are correct. **The positive search result is the client's proof of income eligibility.**

The ProviderOne ID field can be changed.

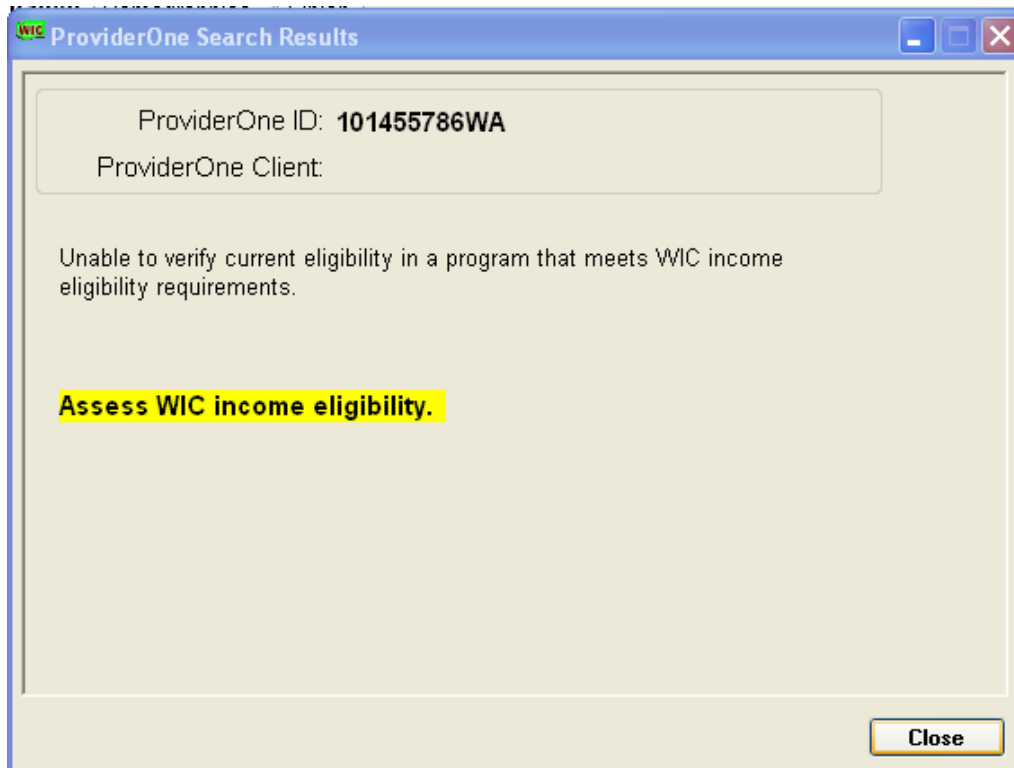
Staff can update the field to correct, remove or add a P1 ID number. In the Marsha and George Washington example, when Marsha is pregnant her ProviderOne ID is used for the P1 Search and her results make her child George eligible. When George is recertified and his mom is no longer pregnant, staff can either update the field if George has his own ProviderOne Services Card, or remove the number from the field since his mom's eligibility doesn't make him eligible because she is not pregnant.

Slide 37 **Activity:**

How do you see these **features** and **efficiencies** being **helpful** in your clinic?

When ProviderOne information is not found

Slide 38 There could be times when you enter a ProviderOne ID and see the following Search Results:



Slide 39 **Reasons a client's information might not be found:**

- The **wrong ProviderOne ID** was entered.
- The **client is not currently eligible** for medical services.
- The client is **not on a program that is a WIC income-qualifying program.**
- The clinic has not received the most current information from the state WIC office – **Client Services hasn't replicated.**

Slide 40

When a ProviderOne client's information is not found, it doesn't mean the client isn't eligible for WIC, it means he/she is not automatically income eligible for WIC because of an income-qualifying program.

When ProviderOne information isn't found

Slide 41 Follow these steps when a person's ProviderOne information isn't found:

- Slide 42 1. **Check the ProviderOne ID** to make sure the correct number was entered. Correct and search again if the wrong ID was entered. **You can leave the Results open** while you do this, the Search Results will update when you press the [P1 Search] button.
- Slide 43 2. **Assess income eligibility** if the correct number was entered but the client's information isn't found. Ask the household size and income to see if it meet's WIC income guidelines.
- Slide 44 3. **Give a grace period if the income amount is eligible and the client didn't bring in proof of income** (like paystubs).

There are two main reasons a person's ProviderOne information won't be found:

- **The person may be currently eligible for a medical program, but it's not a WIC income-qualifying program.**
- **The clinic computer hasn't received the latest information from the state.** The computer hasn't "replicated" (clinic computer hasn't connected with the state computer).

Slide 45 Here's an example of what you could say to the client/caregiver:

"Thank you for bringing in your Services Card today. Our computer couldn't find your medical program eligibility information. Let's check your household size and income to see if you are eligible for WIC..."

Activity:

What other words might you use?

This will probably come up most often for children.

- Many children are on the **Children's Medical Program** which has four levels of **eligibility within the program**, each with **different income guidelines and funding sources**. Some of these are income-qualifying programs and some are not.
- **The State Child Health Insurance Program (SCHIP)** is **not an income-qualifying program**.

WIC looks at these medical programs and levels within the programs and determines which are income-qualifying programs and which are not. This level of detail is not available using other methods of looking up client medical eligibility.

Slide 46 **Using the ProviderOne Search Tool at WIC Appointments**

The ProviderOne search can be used any time income is assessed. This includes the Prescreen, Presume Eligible, New Certification, or Recertification appointments or when current medical program eligibility information is needed.

Review the following table with information about 5 common WIC Service Wizards and how the ProviderOne Search can be used at these appointments.

WIC Service	Using the P1 Search/Documenting Proof
Prescreen usually done over the phone	<ul style="list-style-type: none"> • Staff can enter the ProviderOne ID and press the [P1 Search] button to check for current eligibility. Ask the applicant to bring the card to the appointment. • If the P1 Search does not find the client's information, staff can assess income and ask the applicant to bring in proof of income to the appointment (if the reported income is eligible).
Enroll infant	<ul style="list-style-type: none"> • The mom's ProviderOne ID can be used for the infant if the infant hasn't received the Services Card yet. • The mom must still be within the pregnancy certification period (within 6 weeks postpartum).
New Certification	<ul style="list-style-type: none"> • The applicant needs to bring the ProviderOne card to the new certification appointment so staff can check the name and ProviderOne ID.
Recertification	<ul style="list-style-type: none"> • Any boxes marked at the top of the screen (Medicaid, TANF, Basic Food Program and FDPIR) in the previous certification will be "un-checked" at the recertification. • Staff use the P1 search to check for current eligibility and mark the proofs on the Income tab. • The client/caregiver doesn't need to bring the card to the recertification appointment as long as the ProviderOne ID is saved in the field and staff check for the correct name and current eligibility in the search results.
Change Cert Info	<ul style="list-style-type: none"> • Staff can use the P1 Search to check for current eligibility information if income is re-assessed mid-certification. • The Managed Care Plan information is available anytime by using the P1 Search - see the Appendix for information about Managed Care Plans.

Activity:

What are the most important changes you notice compared to what you do now?

Slide 47 **Transition Plan for April and May**

April:

In April, Medicaid clients will get their medical coupon as usual. Remind clients to bring the medical coupon to their WIC appointment so you can use it to assess for adjunctive eligibility.

May:

In May DSHS clients will only have the ProviderOne Services Card (no paper medical coupon). We plan to have Client Services 6.1 with the ProviderOne search tool in your clinic on May 17th when you log on to the computer.

*Between May 1st and May 17th
ask clients to bring in their proof of
income or see if they can be given a
one month grace period.*

- If the **client brings in proof of income** – see if the income meets WIC’s guidelines. If it does, give checks and schedule the next appointment as usual.
- If the **client doesn’t bring in proof of income** – see if the self-reported amount meets WIC’s guidelines. If it does give a one month grace period for the proof and one set of checks. Schedule the client to come back next month with their proof of income or the ProviderOne card.
- **For clients with a ProviderOne card who have an income above WIC’s guidelines, schedule them to come in after May 17th so the ProviderOne search can be used** to check for adjunctive eligibility. If your clinic has access to the DSHS website (WAMedWeb) you can use this to check for eligibility until the ProviderOne search tool is working in Client Services. Once the search tool is working, this can no longer be used.
- **If a client was given a grace period in April, a second grace period can’t be given in May.** Be sure to either ask the client to bring in proof of income, or schedule the client to come in after May 17th when the ProviderOne search tool will be available.

Slide 48 **Closing**

In this training we've:

- Reviewed WIC rules for adjunctive eligibility.
- Identified how DSHS' new billing system ProviderOne will affect WIC's eligibility assessment and documentation.
- Discovered how the Client Service ProviderOne Search will give staff the information needed to quickly and accurately assess adjunctive eligibility.

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Activity:

Looking back at your list of benefits and challenges with the paper medical coupon, what challenges do you see being eliminated or reduced with the Client Services ProviderOne search?

How do you see this positively impacting your clients?

How do you see this positively impacting your clinic?

Slide 50

*The Client Services ProviderOne Search Tool
takes the guess work out of adjunctive eligibility and
income-qualifying medical programs.*

Appendix

Medical Coupon

Please read the back of this card.

MEDICAL IDENTIFICATION CARD

Washington State Department of Social & Health Services

1 PO BOX 45893
OLYMPIA WA 98504-5893

File Card Valid From 2 08/01/2004
4 501 To 3 08/31/2004

Patient Identification Code (PIC)				Medical Coverage Information											
Initials	Birthdate	Last Name	TB	Insurance	Medicare	HMO	Delox	Restriction	Hospice	DD Clerk	Other				
M-	010143	LIMAB	A												
5	6	7	8	9	10	11	12	13	14	15	16				
														17	

18 MARJORIE LIMA BEANS
#5L
515 WASHINGTON ST
VANCOUVER WA
98660-3456

19 CNP
20
21
22 XXX XXXXXXXXX
23 XXXXXXXXXX

24 NOT TRANSFERABLE

SHOW TO MEDICAL PROVIDER AT TIME OF EACH SERVICE
DSHS 04-023 (REVISED 04/2004)

SIGNATURE (Not Valid Unless Signed)

ProviderOne Services Card



Paper coupon

Mailed each month

All eligible participants listed

Current eligibility dates listed

Program codes listed

Plastic card

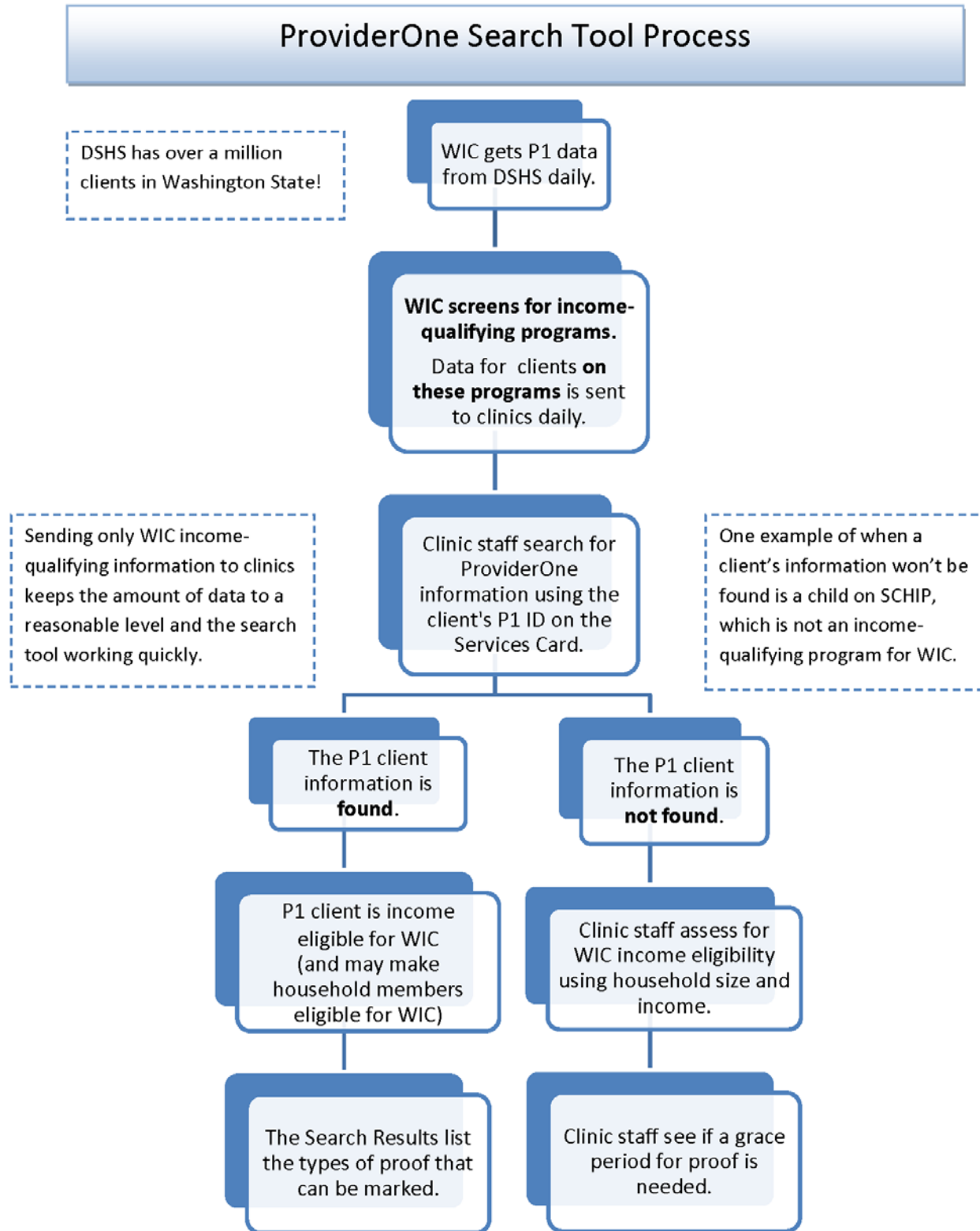
Mailed once (permanent card)

One participant listed per card

No eligibility dates listed

No program codes listed

WIC is required to see proof of current eligibility for an income-qualifying program like Medicaid or a state funded medical program. ProviderOne Services Cards, by themselves, will not give staff the information needed to assess WIC adjunctive eligibility.



Managed Care Plan Enrollment Information

Managed care plan enrollment information is shown at the bottom of the ProviderOne search results. **This is for information purposes only and does not affect WIC eligibility** and does not need to be documented in the client's file.

Managed Care Plans provide medical and health care benefits to Medicaid clients. There are 8 plans a client can choose from to receive benefits. The client's benefits depend on the plan and the medical program he/she is on.

A list of Managed Care Plans and Programs is in the Appendix.

Not all clients are on a Managed Care Plan. When the client is not on a plan the term **“Fee for Service”** will be listed on the ProviderOne Search results. **This means the client can get care from doctors and other providers who accept Medicaid.**

Here are a few examples of how this information can be used by WIC staff.

- 1. When a WIC client is prescribed a formula that is not allowed by WIC, the prescribed formula may be provided through Medicaid.** If the WIC client is on a Managed Care Plan, the Plan's benefit package will determine if the client is eligible to receive the prescribed formula. The procedures a Medicaid client who is on a Managed Care Plan will follow to request a prescribed formula are a little different from a Fee for Service Medicaid client.

Knowing whether the Medicaid client is enrolled in a Managed Care Plan or is Fee for Service will help WIC staff guide the Medicaid client through the process. See the Appendix for more information and resources.

- 2. Knowing which Managed Care Plan the client is on may help WIC staff refer the client to a doctor.** Some doctors work with specific Managed Care Plans. If WIC staff know the client's Managed Care Plan, they can help the client find a doctor who “accepts” Medicaid clients on that Plan.
- 3. WIC staff may know about specific benefits a Managed Care Plan provides to its members.** WIC staff can let the caregiver/client know about some of the benefits of the Managed Care Plan. For example, one Managed Care Plan provides free car seats to infants who are enrolled in their Plan.

Activity:

How do you think your clinic will use this information?

The ProviderOne pop-up with this information is always available by pressing the P1 Search button on the Income Documentation tab.

Managed Care Programs and Plans

Here are the 8 Managed Care Plans and the Managed Care Programs that you may see on the ProviderOne Results pop-up:

<u>Managed Care Plan</u>	<u>Managed Care Program</u>
1. Asuris Northwest Health -	Healthy Options
2. Community Health Plan of Washington -	Healthy Options
Community Health Plan of Washington -	Basic Health Plus
Community Health Plan of Washington -	General Assistance Unemployable
3. Columbia United Providers -	Healthy Options
Columbia United Providers -	Basic Health Plus
4. Group Health Cooperative -	Healthy Options
Group Health Cooperative -	Basic Health Plus
5. Kaiser Foundation Health Plan -	Healthy Options
6. Molina Health Care of Washington, Inc. -	Healthy Options
Molina Health Care of Washington, Inc. -	Basic Health Plus
Molina Health Care of Washington, Inc. -	Washington Medicaid Integration Partnership
7. Regence BlueShield -	Healthy Options
8. Providence ElderPlace -	Healthy Options

References and Resources for Prescribed Formulas

Health Recovery Services Administration – HRSA

The procedures a Fee for Service client follows in order to receive a prescribed formula are described in HRSA/Medicaid’s Enteral Nutrition Billing Instructions. The following website contains the Enteral Nutrition Billing Instructions for ProviderOne.

http://hrsa.dshs.wa.gov/download/p1%20Billing%20Instructions/Enteral_Nutrition_BI_P1.pdf

WIC Policies and Procedures and forms

Volume 1, Chapter 24 – WIC Prescriptions has detailed information about WIC prescribed foods and formulas and the policies and procedures for providing them.

The Washington State WIC Nutrition Program website has information, forms and a flowchart for the process of providing formula and foods that WIC does not provide.

<http://www.doh.wa.gov/cfh/WIC/formula.htm#medicaid>