

**Attachment VI  
Referrals to the LDSS**

| Description  | New York Health Options Actions  | LDSS Actions   |
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| <p><b><i>21-year old on a parents' case at renewal (recipient will turn 21 before the end of the authorization period)</i></b></p>   | <p>If the 21 year old is still living in the household, New York Health Options will mail a Notice of Intent to Apply for MA/FHP/FPBP for completion by the 21 year old. If this form is returned, New York Health Options will refer the case to the district to split the case and process the renewal. New York Health Options will scan the Notice of Intent to Apply and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file will include case notes explaining the reason for the referral. If the Notice of Intent to Apply is not returned, New York Health Options will discontinue coverage for the 21 year old and renew the parents' case as appropriate. The case would not be referred to the district.</p> <p>Note: If the family reports that the 21 year old has moved out of the household, New York Health Options will process the renewal with the existing household members and mail a courtesy notice to the 21 year old (if his/her address is known) requesting that he/she apply at New York State of Health Marketplace.</p> | <p>District will: (1) Close the 21 year old off of parents' case, register the 21 year old on his/her own case, and process eligibility based on case information provided by New York Health Options. (2) Renew the rest of the family members in WMS, if needed, based on case information provided by New York Health Options.</p>  |
| <p><b><i>Newborn on the case and renewal cannot be completed by New York Health Options</i></b></p>  | <p>The following 60-day postpartum renewals will be referred to the district to merge, open newborn on own case, or process mother's renewal: (1) cases where another woman's child is displayed on the case in HEART when the data is pulled from WMS; (2) cases showing a newborn added to another woman's case in error (identified during the clearance process); or (3) cases where a woman reports that her child is not living with her, but resides with another family member and needs to be opened on his/her own case. New York Health Options will scan the renewal form and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file will include case notes explaining the reason for the referral.</p>  | <p>District will:<br/>Scenario 1 - Locate the appropriate case for the newborn listed on this renewal in error. Process the mother's renewal in WMS.<br/>Scenario 2 - Remove the newborn from incorrect case and add it to the correct case. Complete the renewal in WMS.<br/>Scenario 3 - Remove the child that no longer resides in this household and open on his/her own case or add to the appropriate case. Complete the renewal in WMS.</p> |
| <p><b><i>Recently incarcerated individuals who need to be separated from their family, or recently released individuals who need to be joined back with their family</i></b></p> | <p>New York Health Options will refer the following cases to the district: (1) an incarcerated individual needs to be removed from a case (anticipated incarceration &gt;30 days) and placed on a suspended case during their duration of incarceration; (2) an incarcerated individual was recently released and is renewing at the end of his/her 5 month period and reports that he/she is living with his/her family again and the two cases need to be merged. New York Health Options will scan the renewal form and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file will include case notes explaining the reason for the referral.</p>   | <p>District will: (1) Depending on contact with jail/prison - suspend coverage and open on their own case. Budget family case appropriately and process renewal. (2) Join cases together using appropriate case information.</p>   |

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| <p><b><i>One Household-Two Cases (a single HH case needs to be split into two cases, or two cases need to be combined into one case)</i></b></p> | <p><b>When</b> New York Health Options identifies one household with two cases <b>that fit the examples listed below:</b> New York Health Options will collect renewal data and documentation and refer the case to the district to complete renewal processing. New York Health Options will scan the renewal form and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file will include case notes explaining the reason for the referral.</p> |  |
|  | <p><b><i>Examples of cases that require a single case to be split into two cases, include:</i></b></p>  |  |
|  | <p>1) Case moving to new county; child ineligible w/ balance of CSD needs to be split onto own case to remain in County A while rest of case (still eligible) is Luberto'd to County B. Case will be referred to County A; or</p>   | <p>1) District will: (a) Close those members who are moving and continuing eligibility off of the existing case and open a new case for members being moved to new county, using case information provided by New York Health Options. A second transaction for the Luberto will need to be processed the following day, (b) Process renewal for child continuing the balance of his/her CSD. Update mailing address in WMS for child with CSD. Residence will be updated at next renewal to reflect the change in county to trigger Luberto at New York Health Options. A child gets the balance of the CSD if they are ineligible.</p> |
|  | <p>2) A child receiving an adoption subsidy is currently on a case and would become ineligible due to income from other case members; needs to be split onto own case; or</p>   | <p>2) District will determine the adopted child's eligibility and open a separate case, if appropriate</p>   |
|  | <p><b><i>Examples of two cases that need to be joined, include:</i></b></p>   |  |
|  | <p>1) Cases formerly in two counties now in same HH in county A</p>   | <p>County A, which is the county where the renewing case is from, will have to contact County B, the county where the new members have an open case, in order to have the case closed. After the case in County B is closed, County A will add the new household members to the case in WMS.</p>   |

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| <p><b><i>New York Health Options learns there are two cases in the household - one at New York Health Options for processing and one assigned to the district because it requires SSI-R budgeting. A/R alleges a new disability/blindness and case members cannot be renewed with same or better coverage by New York Health Options without a disability determination.</i></b></p> | <p>New York Health Options will enter renewal data into HEART for the case assigned to them and refer the case to the district. New York Health Options will scan the renewal form and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file will include case notes explaining the reason for the referral. (Renewals for SSI-R are not part of New York Health Options population. LDSS will process New York Health Options renewal and the SSI-R renewal together so household receives coordinated review and noticing.)</p> <p>New York Health Options will enter renewal data into HEART and refer the case to the district if: (1) A/R alleges a new disability and renewing the case using an 01 budget would result in a downgrade in coverage; or (2) an SSI-related individual is determined ineligible due to excess income using an 01 budget. New York Health Options will scan the renewal form and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file will include case notes explaining the reason for the referral.</p> | <p>District will use case information provided by New York Health Options along with information collected at the district for the SSI-R renewal to prepare the proper budgets, request documentation if necessary, and renew both cases as appropriate.</p> <p>District will use case information provided by New York Health Options to identify which individual requires a disability review. After completing the disability review, the district will make necessary household composition changes and determine the eligibility for each case member.</p> |
| <p><b><i>New addition to case has two active CINs</i></b></p>  | <p>If an individual added to a case at renewal has two active CINs, New York Health Options will enter renewal data into HEART and refer the case to the district. New York Health Options will scan the renewal form and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file will include case notes explaining the reason for the referral.</p>   | <p>Districts should handle duplicate CINS in accordance with currently policy and complete the renewal, including proper noticing.</p>   |
| <p><b><i>Case requires SSI-R budgeting</i></b></p>   | <p>For the following scenarios, New York Health Options will enter renewal data into HEART but will not request additional documentation (since requirements may differ when SSI-R budget is run by the district): S/CC case and at least one adult case member is receiving Medicare. New York Health Options will scan the renewal form and any documentation into I/EDR and send a copy of the HEART case file to the district via MOVEit. The HEART case file includes case notes explaining the reason for the referral.</p>   | <p>District will use case information provided by New York Health Options to prepare the proper budgets, request documentation if necessary, and renew the case as appropriate.</p>  |