

MassHealth's Electronic Data Management (EDM) Project
Nov. 28, 2011

What EDM does

EDM is a new way for MassHealth to manage and retrieve incoming eligibility-related documents by making scanned copies of documents accessible to MassHealth employees in a location on the computer network called "My Work Space." MassHealth began piloting EDM in Jan. 2011. It went state-wide on Sept. 24, 2011 and is now used for all MBRs (applications), ERVs & MERs (review forms), and associated verifications and reported changes but not yet for applications and related verifications for long term care.

What EDM does not do

EDM does not automatically enter information into the MA-21/PACES computer eligibility systems. MassHealth employees must still enter data from the scanned documents into the eligibility systems just as they have always done from paper documents. EDM also doesn't change the need to mail in originals for which MassHealth needs a "wet" signature.

Advantages of EDM

Documents can be processed at any MassHealth office in the order they are received. Supervisors can view and better manage workloads. Workers can more easily retrieve documents for priority processing if there is a medical need. Data entry errors or errors interpreting documents can more easily be corrected without having to resend documents. If identifying data is properly entered from scanned documents, it will "stop the clock" on outstanding requests for forms and verification while the document is waiting to be fully processed. In the future, Virtual Gateway/My Account Page (VG/MAP) users will be able to see on MAP that a document has been received, by what date, and whether or not it has been processed.

Limitations of EDM

EDM does not solve the problem of processing delays. EDM requires additional clerical steps compared to the prior mail management system. Paper documents must be manually scanned. However, documents sent to one of two E-Fax numbers are transmitted electronically and need not be manually scanned.

All electronic documents must be "indexed" by clerical workers who enter identifying information into MA-21/PACES. If there was an error entering identifying information, there will be no "match" with the eligibility systems, and no stopping the clock. The system does not inform the indexer whether the information she entered did or did not match up with someone known to the system. MassHealth is currently unable to determine how often no-match situations arise. With or without a match the scanned document will be stored in My Work Space.

When workers are ready to process documents from the queue in My Work Space, the system is not currently designed to enable them to retrieve all documents in the queue related to the same household. Thus a worker who on Nov 1 is processing an MBR received on Oct. 1, will not know that the associated verification were received on October 10 and are available in the queue.

Currently, the Quality Control system does not check the quality of scans against the original if the person scanning indicates the poor quality was “as received.” If scanned documents are illegible or incomplete (dates cut off etc.), it will not be until the worker retrieves the document from the queue that a further request for information will go out.

Workers are not supposed to receive direct faxes unless approved by managers e.g. in medical need situations. With delays processing documents such as PSIs (Permission to Share Information forms), this has made it more difficult for advocates to troubleshoot problem cases with MassHealth staff.

Tips for making the best use of EDM

Fax clear copies with head of household well-identified

- Return documents as soon as possible in advance of due date.
- Submit documents by E-Fax rather than in person or by mail whenever you can.
 - For new applications and related verifications (except for long term care), Fax to 617-887-8799 (Central Processing Unit)
 - For annual reviews and related verifications and reporting other changes (including for long term care), Fax to 617-887-8777 (Taunton MEC)
 - Documents for which MassHealth requires an original “wet” signature must still be mailed.
 - No change for appeals. Continue to fax to the Board of Hearings at 617-847-1204.
- Use one Fax cover sheet for each household.
- If you file an application through the Virtual Gateway (VG) it will generate a fax cover sheet with a bar code that will identify a separate household when MassHealth receives the E-Fax. A current VG cover sheet can also be downloaded here: <http://www.mass.gov/eohhs/docs/vg/common-intake/mh-cover-sheet.pdf>
- The Office of Medicaid is working on a fax cover sheet for non VG users that will be posted on its website soon.
- Clearly label the cover sheet and all accompanying documents with the identity of the head of household listing: Last name, first name, date of birth, and SSN or Medicaid ID number. But if document relates to another household member, make sure that is clearly indicated too.
- Make sure you have sent both sides of 2-sided copies.
- Keep a copy of the Fax receipt

Trouble-shooting when timely documents failed to stop the clock

- Expect it to take up to 4 days before a document is indexed and accessible to MassHealth workers in My Work Space.
 - The computer is programmed to allow 5 days after the due date for an ERV or MER (review form) or VC-1 (request for information) before sending out a denial or termination
- If a termination notice goes out for not returning a document on time, submitting the document before the closing date will NOT stop the clock, but if the document was actually submitted by the due date –
 - You should be able to confirm with the MassHealth Enrollment Center (MEC) or Customer Service the date that the document was received, if the document is recorded as received on time, then it may have been a matching error--

- Call the MEC and ask them to reinstate benefits
 - If the MEC worker processes the case based on your call, the effective date of coverage should be 10 days prior to the date of actual receipt of “late” documents not 10 day prior to processing. This will prevent a gap in coverage in most cases
 - If the case was closed for late verifications, the worker must manually enter the correct effective date or the case will only reopen on the date of processing
- Appeal before the closing date to protect benefits if the MEC is unable or unwilling to reinstate benefits or in any other case where an individual does not have the coverage he or she would have had but for the erroneous termination action.
- MLRI is very interested in the extent of matching problems-please call us if you confirm your client experienced a matching error.

Trouble-shooting processing delays in cases of medical need

- Expect processing to take 45 days for those under 65 and 60 days or more for those age 65 and older subject to the asset test.
- If the individual needs an application or other documentation to be processed in order to access medical services –
 - Call the MEC, explain the individual’s need for medical services, and ask that documents be processed now
 - If a document is accessible in My Work Space, MEC workers are supposed to process medical need cases right away
 - If a document is not accessible, MEC workers are supposed to supply a Fax number for one time use to receive documents in cases of medical need. It should also be possible to submit your PSI in this way for a medical need case. Approval of a manager may be needed for a MEC worker to give out this Fax number because it is not an E-Fax.

Trouble-shooting no-SSN cases that failed to stop the clock

- From mid July to mid October, EDM cases in which the head of household had no SSN were not matching. This means some individuals were wrongly terminated for not returning forms on time. Workers were instructed to reinstate benefits retroactively at the time of processing. If you see one of these cases-
 - Call the MEC to reinstate benefits back to the date of termination
- In mid-October, the matching logic was changed to look for name and date of birth if there is no SSN.

Getting through to the MECs

Customer service (800-841-2900) should be able to confirm that a document has been received but cannot process a document. If unable to get through to a MEC due to high call volume, try this email address for medical need cases: masshealthhelp@state.ma.us. Don’t forget the option of filing an appeal before the later of the closing date or 10 days from the notice date to continue benefits pending appeal. If unable to get relief in a reasonable time, please call Vicky or Neil at MLRI.

**Please let us know your experiences with EDM: Is it working for you & your clients?
vpulos@mlri.org, ncronin@mlri.org; 617-357-0700 Ext. 318 & Ext. 309**