



# Medicaid Information Technology System

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**State & Local Government Solutions  
Medicaid Information Technology System (MITS)**

## **Recipient Related Data Participant Guide**

**August 23, 2010**

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# Table of Contents

Course Overview.....	1
Overview.....	1
Objective(s).....	1
Agenda .....	1
Introduction to Recipient Related Data .....	2
Introduction.....	2
Code Categories .....	4
Check Your Understanding.....	6
Summary .....	6
Viewing Recipient Related Data .....	7
Overview.....	7
What .....	7
Who .....	7
When.....	7
Relevance.....	7
Requirements .....	7
Guidelines .....	7
How To .....	8
Success.....	8
Practice.....	8
Adding Recipient Related Data .....	9
Overview.....	9
What .....	9
Who .....	9
When.....	9
Relevance.....	9
Requirements .....	9
How To .....	10
Success.....	10
Next Steps .....	10
Practice.....	10
Updating Recipient Related Data .....	11
Overview.....	11
What .....	11
Who .....	11
When.....	11
Relevance.....	11
Requirements .....	11
How To .....	12
Success.....	12
Next Steps .....	12
Practice.....	12
Review .....	13
Objectives .....	13

# Course Overview

## Overview

The goal of this course is to provide you with the skills required to perform tasks associated with recipient related data in the Ohio Medicaid Information Technology System (MITS).

## Objective(s)

After completing this course, you should be able to:

- View recipient related data
- Add recipient related data
- Update recipient related data

## Agenda

Topic	Time
Welcome and Introductions	5 minutes
Course Overview	10 minutes
Introduction to Recipient Related Data	30 minutes
Viewing Recipient Related Data	30 minutes
Adding Recipient Related Data	45 minutes
Updating Recipient Related Data	30 minutes

# Introduction to Recipient Related Data

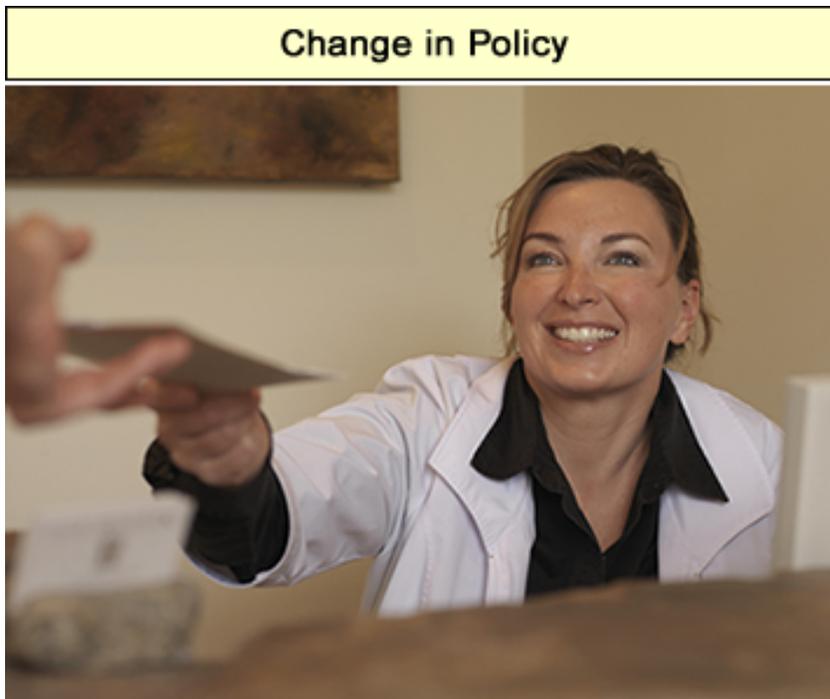
## Introduction

As business and policies change, you may need to add, update or remove recipient related data codes. Adding recipient related data impacts the codes and descriptions that display on the drop-down lists on the **Recipient** panels in MITS.



Maintaining recipient related data also enables you to maintain the reference data you use to make decisions.

Review the images to view scenarios in which you may need to add or update recipient related data.



A policy change that requires a new code.

### Eligibility Request



The eligibility department requests a new code.

### Department Request



Another department requests a new code.

## Code Categories

Adding recipient related data involves adding codes to a specific panel. Each code that you add must include related data, for example, a description. The table summarizes the panels you can use to change recipient related data code information.

TO:	THEN use this panel:
Store valid aid category codes, descriptions and aid category group descriptions	Aid Category
Maintain assignment plan reason codes	Assignment Plan Reason
Maintain the attachment types and descriptions	Attachment Type
Specify valid action codes, descriptions, and priorities used when setting up batch errors for PS/2 processing	Batch Error Action
Indicate the error number and message for use in the PS/2 update process	Batch Error Message
Maintain valid codes and descriptions for reasons related to eligibility termination	Benefit Plan Stop Reason
Specify buy-in transaction codes Centers for Medicare and Medicaid Services (CMS) sends to the state through the monthly buy-in billing tapes	Buy-In Bill Txn
Maintain codes and descriptions of the specific category of assistance codes used in buy-in processing	Buy-In Eligibility
Store buy-in transaction codes sent on the Part A Outbound and Part B Outbound tapes to CMS	Buy-In Premium Txn
Indicate type of assistance available to pre-determined standard filing units	Case Category Codes
Maintain recipient case relationships and descriptions	Case Relationship
Store the allowable codes describing a recipient's citizenship	Citizen Description
Maintain county office codes, county codes, and office address information	County Office
Maintain eligibility aid reason codes	Eligibility Aid Reason
View valid FIAT codes and their descriptions	FIAT Codes
Maintain valid hospice action codes and their descriptions	Hospice Action Codes

TO:	THEN use this panel:
View the source of income for a recipient/case	Income Source Codes
Maintain level of care codes and their descriptions	Level of Care
Maintain the level of care reason codes and their descriptions	Level of Care Reason
Maintain Medicaid classification codes and their descriptions	Medicaid Classification
Maintain external entities that may trigger a HIB addition or update	Medicare Source
Maintain date type codes and descriptions	Miscellaneous Date Type
Maintain Eligibility Indicator Codes and their descriptions	Miscellaneous Eligibility Indicator Codes
Store all of the dual status codes for Medicare Part D	Part D Dual Status
Maintain all of the enrollment type codes for Medicare Part D	Part D Enrollment
Designate patient liability codes and descriptions	Patient Liability Type
Store phone type codes and descriptions <b>Note:</b> The codes either represent to whom a phone number belongs or what type of phone it is (landline, mobile, etc.).	Phone Type
Specify the reasons, codes, and descriptions to put a recipient on review	Review Reason
Store review requester codes and descriptions	Review Requester
Maintain source codes and their descriptions <b>Note:</b> Source codes indicate how a case record is obtained and how long it is kept in MITS.	Source Code
Specify codes and descriptions for reasons the transportation was not provided	Transportation Non-Assistance Reasons
Maintain transportation program areas and their descriptions	Transportation Program Area
Maintain transportation types and their descriptions	Transportation Type
Specify a list of approved vendors for each county	Transportation Vendor
Store valid waiver codes and their descriptions	Waiver Codes

## Check Your Understanding

This activity contains questions to assess your understanding of key concepts in this topic. Review the topic if your score is below your standards.

A typical recipient related data change is a change to an eligibility status code.

- A. True
- B. False

To update the description for a code related to a recipient transportation denial, access the \_\_\_\_\_ panel.

- A. Review Reasons
- B. Transportation Non-Assistance Reasons
- C. Attachment Type
- D. Level of Care

## Summary

In this lesson, you learned about the importance and process for maintaining recipient related codes.

# Viewing Recipient Related Data

## Overview

### What

In this topic, you learn how to search for and view related data in the Recipient subsystem.

### Who

OHP supervisors, managers, and staff with appropriate security perform this task.

### When

You perform this task when you need to review recipient related data.

### Relevance

You perform a search when you are researching and analyzing data.

If you do not perform this task properly, the correct information may not display and may affect claims processing and policy.

### Requirements

To perform this task, you need the related data value you want to view.

### Guidelines

You should have a basic understanding of general code sets.

## How To

Follow these steps from the MITS home page to view recipient related data code sets:

Step	Action
1	Point to <b>Recipient</b> and click <b>Related Data</b> .
2	If necessary, click the appropriate Related Data panel set to display the related data panel(s) you want to view. <b>Note:</b> Choices are Codes, Other, and Xref.
3	Select the panel name for the related data you want to view.

## Success

You have successfully completed this task when the appropriate recipient related data displays.

## Practice

View information on any of the following panels:

- Case Relationship
- Citizen Description
- Eligibility Aid Reason

When you complete the practice, be prepared to describe what types of information you were able to view on these panels.

# Adding Recipient Related Data

## Overview

### What

In this topic, you learn how to add related data in the Recipient subsystem.

### Who

OHP supervisors, managers, and staff with appropriate security perform this task.

### When

You complete this task as needed. Examples of when a related data code may be added are:

- Policy changes occur and a new code is identified.
- Staff continually asks management for a code change. Management sees this pattern and adds the code.
- Another department sends an email requesting a new code.

### Relevance

Codes are added so that most accurate and current codes are available for OHP staff to use when maintaining recipient information. If the most current codes aren't available, the possibility exists of incorrect data being entered.

### Requirements

To perform this task, you need:

- Appropriate security level to add codes
- Information about the code you want to add
- Knowledge of OHP policies and procedures

## How To

Follow these steps from the MITS home page to add related data:

Step	Action
1	Point to <b>Recipient</b> and click <b>Related Data</b> .
2	Select the appropriate Related Data panel set: <b>Codes, Other</b> or <b>Xref</b> .
3	Click the panel where you want to add related data.
4	Click <b>add</b> .
5	Type information or make a selection from the drop-down lists in the required fields, as necessary. Complete the optional fields as desired.
6	Click <b>save</b> .

## Success

You have successfully completed this task when a confirmation message displays.

## Next Steps

Once you receive a confirmation message, verify that you entered your information correctly.

## Practice

Add a code to the Attachment Type panel.

When you add a code successfully, a confirmation message displays. Be prepared to describe the required fields that you added and what code and description you specified.

Record the code you added: \_\_\_\_\_ (to be used in an upcoming practice).

# Updating Recipient Related Data

## Overview

### What

In this topic, you learn how to update related data in the Recipient subsystem.

When updating related data information, you can only update certain fields depending on the panel you select. If you are accessing information from another interface, there may be certain fields that cannot be updated. For example, the Medicaid Class and Category of Assistance data in the Medicaid Classification panel is uploaded from an interface outside of MITS and cannot be updated.

### Who

OHP supervisors, managers, and staff with appropriate security perform this task.

### When

You complete this task when you receive a request to update related data information.

### Relevance

You must update codes to ensure that OHP staff members use the most accurate and current codes when maintaining recipient information.

### Requirements

To perform this task, you need:

- Appropriate security level to add codes
- Information about the code you want to add
- Knowledge of OHP policies and procedures

## How To

Follow these steps from the MITS home page to update recipient related data:

Step	Action
1	Point to <b>Recipient</b> and click <b>Related Data</b> .
2	Select the appropriate Related Data panel set: <b>Codes, Other</b> or <b>Xref</b> .
3	Select the panel where you want to update related data, and click the desired record from the displayed list.
4	Type information or make selections from the drop-down lists as necessary.
5	Click <b>save</b> .

## Success

You have successfully completed this task when a confirmation message displays.

## Next Steps

Once you receive a confirmation message, verify that you entered your information correctly.

## Practice

Update the attachment type code information that you added in the previous practice exercise.

After successfully completing the update, the message "Save was successful" displays.

## Review

### Objectives

In this course, you learned how to:

- View recipient related data
- Add recipient related data
- Update recipient related data