



**State of Florida
Department of Children and Families**

Rick Scott
Governor

Mike Carroll
Interim Secretary

DATE: December 5, 2014 **TRANSMITTAL NO.:** I-14-12-0014

TO: Economic Self-Sufficiency Operations Managers
Economic Self-Sufficiency Program Offices

FROM: Dianna Laffey, Chief, Program Policy (**Signature on File**)

SUBJECT: Telephonic Application Process for Family-Related Medicaid

EFFECTIVE: November 2014

This memo provides information about the new Telephonic Application Process for Family-Related Medicaid. This new method will be used to submit an application, a request for additional assistance, or renewal of benefits for Family-Related Medicaid only.

This process is being implemented to comply with federal regulations to allow individuals requesting assistance for Family-Related Medicaid only the opportunity to apply and submit a request to the Department using alternative methods.

Request for Telephonic Application

Staff receiving an initial request to complete a telephonic application may transfer the customer to the Customer Call Center (CCC) or direct them to call 866-762-2237. A request received in person or over the phone must be routed through CCC staff to complete a preliminary screening. If the individual is willing to complete the telephonic process, CCC staff will transfer the call to designated staff to complete the application process.

Attachment 1 includes the screening process completed by CCC and designated staff to ensure the applicant or recipient is requesting Family-Related Medicaid only and is able to complete the telephonic application.

Attachment

If there are policy questions, Region offices may contact Dorthene Baker at (850) 717-4293.

cc: Assistant Secretary for Economic Self-Sufficiency (Jennifer Lange)
Director (Nathan Lewis)
Customer Call Center (Pat Badland, Liesta Sykes, Irene Hill, Hyung Kim, Georgina Santana)

1317 Winewood Boulevard, Tallahassee, Florida 32399-0700

EBT and Technology (Debbie McLemore, Florence Hollinghead, Michael Pogue)

FLORIDA Help Desk (Anthony Gaston)

Information Technology (Kit Goodner, Barbara Roglieri)

Medicaid Eligibility System (Suzanne Poirier, Margie France, William Martinez, Eileen Schilling)

Office of Appeal Hearings (Betty Zachem)

Office of Communications (Alexis Lambert)

Office of the General Counsel (Herschel Minnis)

Office of Quality Management (Tonyaleah Veltkamp, Cindy Mickler, Annette Wiechers, Susan Thomas)

Program Policy (Dorthene Baker, Jena Grignon, Connie Mathers)

Public Benefits Integrity (Andrew McClenahan, Sheri Hall, Fred Young)

AHCA (Kathy Austin, Melanie Brown-Woofter, Lisa Gill, Peggy Hall, Shevaun Harris, Beth Kidder, David Rogers)

Florida Bar Elder Law Section (Emma Hemness, Twyla Sketchley)

Florida Legal Services (Cindy Huddleston)

Telephonic Application Information Sheet

DCF receives the request for a telephonic application

The CCC or other Representative who receives the initial request will screen customer for their willingness and ability to apply over the telephone

- Determine if the caller is applying, renewing benefits, or seeking additional benefits for only Family-Related Medicaid, including Emergency Medical Assistance for Noncitizens (EMA).
 - Are you applying for a:
 - Pregnant woman?
 - Individual under age 21 (an individual under age 21 may apply on their own)
 - Parent or other caretaker relative of a child (the child must be under age 18 and living in the home)
 - Former foster care individual under age 26?
 - If yes to any of the questions, continue.
 - If no, provide information about other application options available.
- Ensure that the caller is aware of other options to complete their application via an Authorized Representative or by using the online Self-Service Portal
- Explain that the application by phone may require the caller to be on the telephone up to an hour or more to complete their application. Is the applicant available to remain on the phone for this period of time?
- Explain to the caller that they must provide a recorded voice signature
- Explain to the caller that they must be able to prove their identity by answering identity proofing questions
- Explain to the caller that they must be willing to provide detailed personal information to the call taker
- Explain to the caller that they must have the following information available for all household members:
 - Social Security Number
 - Income Information
 - Other required documentation ...
- Inform the individual that the telephone application will be recorded and retained
- Inform the applicant that they must be transferred to another DCF employee who will work with them to complete their application over the phone

Transfers the Call

The Representative:

- Transfers the call to a staff person who has been identified to complete the telephonic application

Attachment 1

Designated Staff	
<i>Receives the Transferred Call</i>	
An individual with the newly designated AMS worker role: <ul style="list-style-type: none"> • Explains to the customer that the call will be recorded and retained 	
<i>Verifies the caller's intent to complete the application by telephone</i>	
The designated staff: <ul style="list-style-type: none"> • Verifies that the caller knows that it may take up to (1 hour?) to complete the application by telephone • Verifies that the caller has all of the proper documentation • Verifies the caller will provide a recorded voice signature • Verify that the caller is willing to prove their identity by answering identity proofing questions • Verifies that the customer is willing to share personal information with the representative 	
<i>Creates an application in SSP on behalf of the Customer</i>	
Designated Staff will: <ul style="list-style-type: none"> • Click on a link in AMS to enter the SSP • Create an account for the customer (or use existing account credentials) • Read required information to the applicant such as the Rights and Responsibilities and Health Insurance Portability and Accountability Act (HIPAA) • Complete the application just as the customer would, but by gathering the information for the application from the caller • Complete the telephonic signature • Notify the customer that they will receive a confirmation receipt which documents the telephonic application • Explain that customer will receive notification • Explain My Account User ID and Password can be updated • Explain My Account 	The system will: <ul style="list-style-type: none"> • Create AMS worker role which allows workers to enter a customer's application directly into the SSP • Record the entire conversation including the signature • Create a comment in the AMS Work Item indicating that the application, renewal, or request for additional benefits was completed via the telephonic application process. It will state "This work item was completed using the telephonic application process" • Show the work item details as "MESTE" -- indicating the method by which the application was received