

<Completing a Medicaid Eligibility and Managed Care Plan Selection>



Knowledge Base Article

Completing a Medicaid Eligibility and Managed Care Plan Selection

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Completing a Medicaid Eligibility and Managed Care Plan Selection

Overview

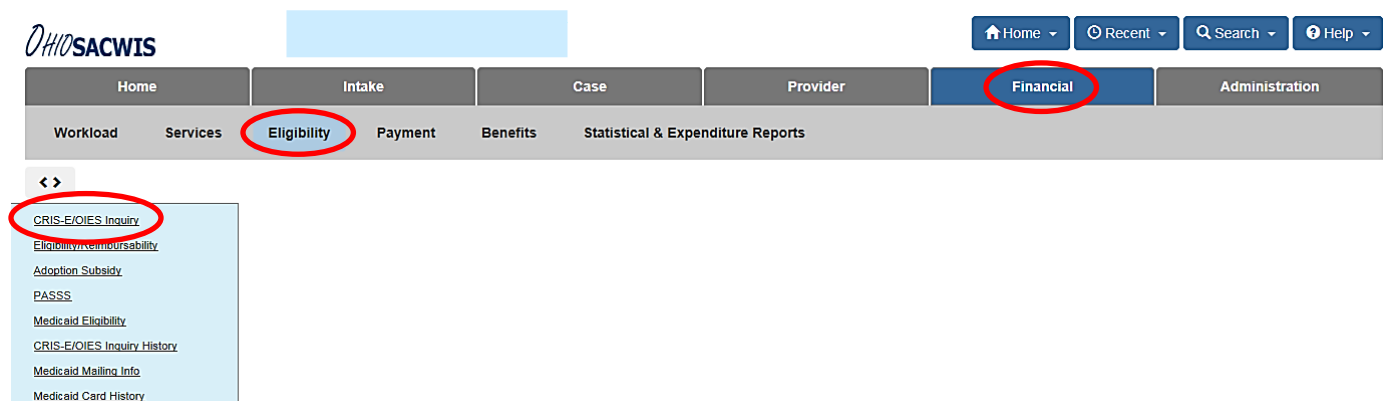
This article describes how agencies can enroll and dis-enroll children into a managed care plan. Effective January 1, 2017, all children in out of home care must be enrolled into a managed care plan. New functionality is being added in SACWIS so agencies can easily enroll children. The agency must have a SACWIS generated Medicaid span in place to add an enrollment. Once an enrollment has been entered in SACWIS, a nightly batch job will transmit the enrollment or disenrollment information the Automated Health Systems (AHS).

Note: The User must have MCP Coordinator security to enroll children in managed care plans.

If the user currently has 'Agency System Administrator' or 'Agency Info- Read Only' security, these securities do not permit access to enter Agency Config information. These securities must be removed in order to Add Configuration information in the system.

Navigating to the OIES Data Inquiry Screen

1. From the SACWIS **Home** screen, click the **Financial** tab.
2. Click the **Eligibility** tab.
3. Click the **CRIS-E/OIES Inquiry** link on the **Navigation** menu.



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The **CRIS-E/OIES Data Inquiry** screen appears as shown below.

4. Select the **Public** or **Private** Button.
5. If you know the child's **Person ID**, enter the number in the **Person ID** field.
6. Or, click the **Person Search** button to locate the appropriate child.
7. Click the **Go** button.

The screenshot shows the 'CRIS-E/OIES Data Inquiry' web interface. On the left is a navigation menu with links: 'CRIS-E/OIES Inquiry', 'Eligibility/Reimburseability', 'Adoption Subsidy', 'PASSS', 'Medicaid Eligibility', 'CRIS-E/OIES Inquiry History', 'Medicaid Mailing Info', and 'Medicaid Card History'. The main form area has a title bar 'CRIS-E/OIES Data Inquiry' and two radio buttons: 'Public' (selected) and 'Private'. Below this is a horizontal bar containing a 'Person Search' button, a separator '- of -', and a 'Person ID:' field with a 'Go' button. The form contains two columns of labels: Name, Person ID, DOB, Gender, SSN, Title IV-E #, Initial Custody Date, CRIS-E Recipient ID, CRIS-E Last Query Date, OIES Person ID, and OIES Last Query Date. A 'Clear Form' button is located at the bottom left of the form area.

The search results appear in the **OIES Data Inquiry** screen.

Important:

- If the **Public** button was selected, the system enables the **Initial Custody Date** field drop-down list so you can choose a date as shown below.
- If the **Private** Button was selected, the system displays a calendar and you will enter a date for the initial custody. However, to launch the OIES interface, a pending adoption subsidy record is needed.

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Launching OIES Information

1. Select a date in the **Initial Custody Date** field.

Important: This date will be used to determine IV-E FCM eligibility.

2. Once a date has been entered, click the **Launch OIES Information** button.

The screenshot shows the 'CRIS-E/OIES Data Inquiry' web interface. On the left is a navigation menu with links like 'CRIS-E/OIES Inquiry', 'Eligibility/Reimbursability', 'Adoption Subsidy', 'PASSS', 'Medicaid Eligibility', 'CRIS-E/OIES Inquiry History', 'Medicaid Mailing Info', and 'Medicaid Card History'. The main form area has a 'Public' radio button selected. Below that is a 'Person Search' button and a 'Person ID' field with a 'Go' button. The form contains several input fields: 'Name', 'Person ID', 'DOB', 'Gender', 'SSN', 'Title IV-E #', 'Initial Custody Date' (highlighted with a green box), 'CRIS-E Recipient ID', 'CRIS-E Last Query Date', 'OIES Person ID', and 'OIES Last Query Date'. At the bottom, there is a 'Confidentiality Statement' and three buttons: 'Launch CRIS-E Information', 'Launch OIES Information' (circled in red), and 'Clear Form'.

The **OIES Potential Matches** screen appears displaying the search results.

Note: Potential match results are based on an exact match and then “Fuzzy logic” in order of the following criteria: SSN, Recipient ID, First and Last Name, Gender, and DOB.

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3. Click the **View** link in the appropriate row.

The screenshot shows the OHIO SACWIS OIES Inquiry screen. At the top, there is a navigation bar with 'Home', 'Recent', 'Search', and 'Help' buttons. Below the navigation bar, there is a header section with 'Child in Custody', 'Person ID', 'DOB', 'Gender', 'SSN', and 'Custody Date'. The 'Gender' field is set to 'Female' and 'Custody Date' is '08/18/2016'. Below this, there is a table titled 'OIES Potential Matches'. The table has columns for 'OIES Person ID', 'Name', 'SSN', 'DOB', 'Gender', 'Race', 'County', and 'Match'. A 'View' link is circled in green in the first row of the table. Below the table, there are 'Close' and 'Search Sacwis Case Members' buttons.

The OIES **Case History** screen appears.

4. Click the **View** link in the appropriate row.

The screenshot shows the OHIO SACWIS OIES Inquiry screen. At the top, there is a navigation bar with 'Home', 'Recent', 'Search', and 'Help' buttons. Below the navigation bar, there is a header section with 'Child in Custody', 'Person ID', 'DOB', 'Gender', 'SSN', and 'Custody Date'. The 'Gender' field is set to 'Female' and 'Custody Date' is '08/18/2016'. Below this, there is a table titled 'OIES Case History'. The table has columns for 'OIES Case ID', 'Case Status', 'Effective Date', 'Case Address', 'Case Phone', 'Worker', and 'Worker Phone'. A 'View' link is circled in green in the first row of the table. Below the table, there are 'Close' and 'Exit' buttons. At the bottom of the screen, there is a footer with links for 'HELP & TRAINING', 'PRIVACY & SECURITY', 'AGENCY SEARCH', 'BOM REPORTING', and 'BIC REPORTING', and a version number '3.06.5'.

The **Selected OIES Case Member** screen appears displaying the **Selected OIES Case Member** in the top grid and the related **SACWIS Case Members** in the bottom grid.

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5. Click the **Select** link next to the child's name.

The screenshot shows the OHIO SACWIS interface. At the top, there are navigation buttons: Home, Recent, Search, and Help. Below the header, there is a breadcrumb trail: Financial > Eligibility > OIES Inquiry. The main content area is divided into two sections: 'Selected OIES Case Member' and 'Sacwis Case Members'.

The 'Selected OIES Case Member' table has the following data:

Child in Custody	Person ID	DOB	Gender	SSN	Custody Date
[Redacted]	[Redacted]	[Redacted]	Female	[Redacted]	08/18/2016

The 'Sacwis Case Members' table has the following data:

OIES Person ID	Person ID	Name	DOB	Age	Gender
[Redacted]	[Redacted]	[Redacted]	[Redacted]	1	Female
[Redacted]	[Redacted]	[Redacted]	[Redacted]	74	Female
[Redacted]	[Redacted]	[Redacted]	[Redacted]	23	Male
[Redacted]	[Redacted]	[Redacted]	[Redacted]	23	Male
[Redacted]	[Redacted]	[Redacted]	[Redacted]	19	Female
[Redacted]	[Redacted]	[Redacted]	[Redacted]	4	Female
[Redacted]	[Redacted]	[Redacted]	[Redacted]	1	Female
[Redacted]	[Redacted]	[Redacted]	[Redacted]	0	Male

At the bottom of the 'Sacwis Case Members' table, there are buttons for 'Person Search' and 'Close'. A 'select' link in the first row of the table is circled in green.

The Medicaid type that exists in OIES will be transferred to SACWIS.

The screenshot shows the Medicaid Eligibility interface. At the top, there is a header: Medicaid Eligibility. Below the header, there is a section for 'OIES Case Member' with a table:

Begin Date	End Date	Medicaid #	Medicaid Type
07/01/2016		[Redacted]	Medicaid MAGI Deemed Infant
06/01/2016	06/30/2016	[Redacted]	Medicaid MAGI Deemed Infant
08/01/2015	05/31/2016	[Redacted]	Medicaid MAGI Deemed Infant
07/01/2015	07/31/2015	[Redacted]	MAGI Child Under 1

Below the 'OIES Case Member' table, there is a section for 'SACWIS Case Member' with a table:

MITS Number	Begin Date
[Redacted]	[Redacted]

At the bottom of the interface, there are buttons: 'Transfer Data to SACWIS', 'Send OIES Custody Notification', 'Close', and 'Exit'. The 'Transfer Data to SACWIS' button is circled in red.

6. Click **Transfer Data to SACWIS** button.

Note: The data needs to be transferred into SACWIS. This is imperative because the Medicaid type information must be sent to MITS as part of the eligibility process. Once the data has been transferred to SACWIS from OIES, the information can be transmitted to MITS with the SACWIS generated span.

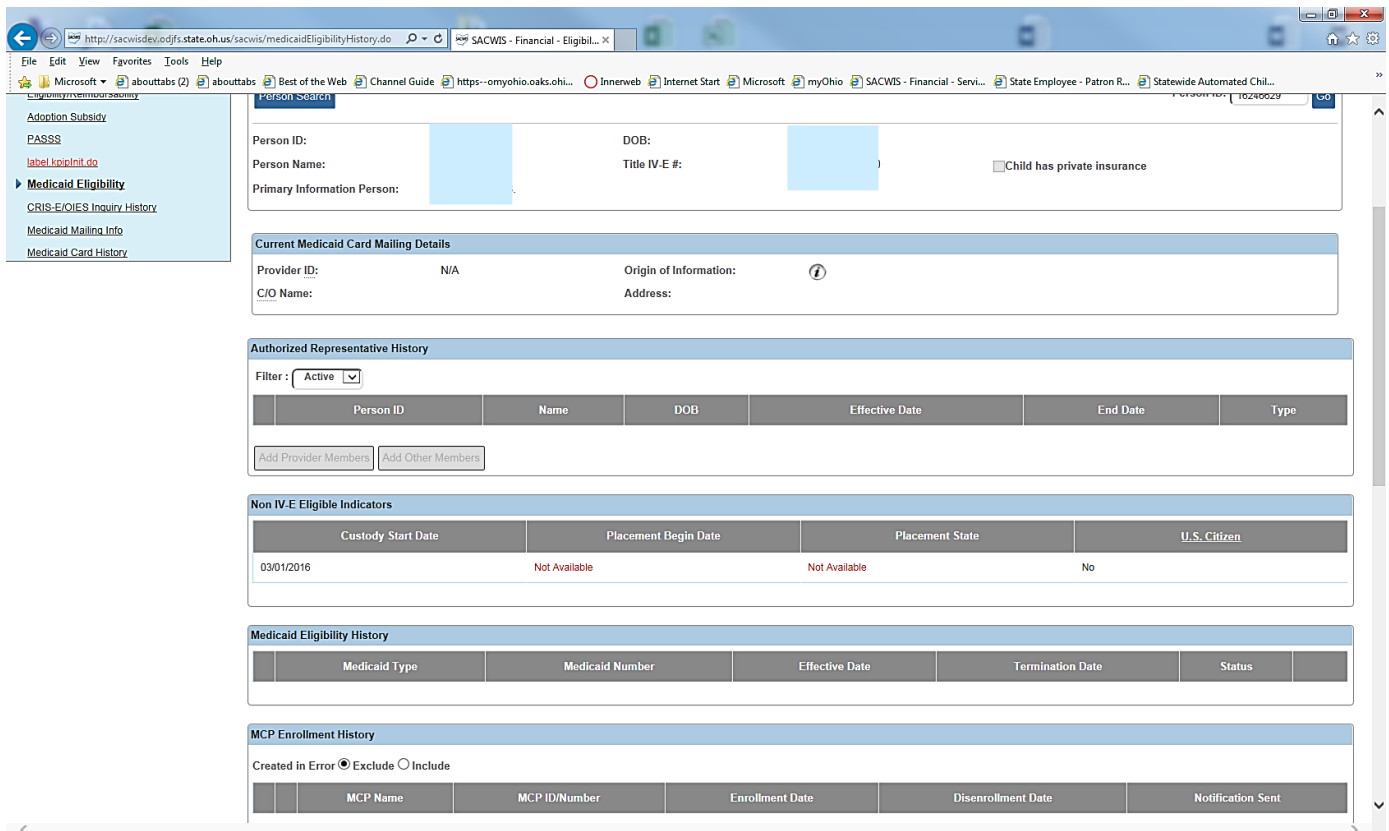
All new children entering custody on or after 1/3/2017, SACWIS will generate Medicaid eligibility span if all of the following eligibility criteria have been met:

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- The child is the custody of a Title IV-E agency
- The child is in an out of home care setting
- The placement setting has been marked complete
- The citizen requirement has been met
 - a. This requirement can be met once the child's citizenship has been verified and entered in the child's person record, or if this has been verified within any historical Title IV-E eligibility record for the child

If any of these elements are missing it will be apparent to the user.

Note: The following screenshot is what it looks like when those elements are missing.



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Note: When all elements are present, SACWIS will generate a Non IV-E Medicaid eligibility span. The screenshot below serves as an example.

Non IV-E Eligible Indicators			
Custody Start Date	Placement Begin Date	Placement State	U.S. Citizen
11/01/2016	11/01/2016	OH	Yes

Medicaid Eligibility History					
	Medicaid Type	Medicaid Number	Effective Date	Termination Date	Status
view	NON-IV-EFCM		11/01/2016		Active - SACWIS
report					

MCP Enrollment History					
Created in Error <input checked="" type="radio"/> Exclude <input type="radio"/> Include					
	MCP Name	MCP ID/Number	Enrollment Date	Disenrollment Date	Notification Sent
view	United Healthcare Community		11/01/2016		No
edit					

[Add MCP Enrollment/MCP Disenrollment](#)

Stop Span History		
Stop Span Effective Date	Stop Span End Date	Comments

[Add Stop Span](#) [Restart Span](#)

Note: Unless the child is placed out of state, the span will not be sent to MITS until the user has selected a managed care plan.

The system will account for changes in IV-E eligibility, as well as changes to AA or SAMS. When these records are created in the system, SACWIS will end date the existing Non IV-E Medicaid span and will send an update to MITS to end the non-IVE span and open an IV-E Medicaid and vice versa.

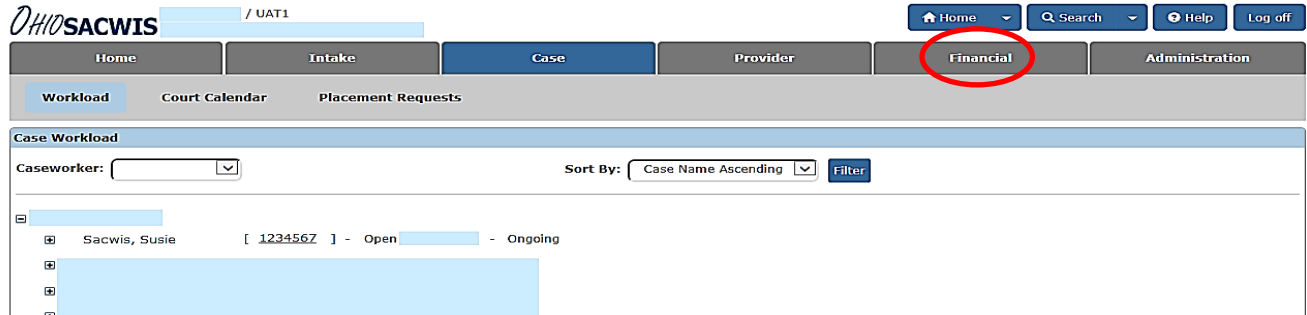
Additional system derived indicators will be transmitted to MITS for:

- Deemed Newborns
- SSI Recipients
- Children in receipt of **State Adoption Maintenance Subsidy (SAMS)** who meet the special needs criteria identified in **OAC rule 5101:2-44-06**
- Children in receipt of **State Adoption Maintenance Subsidy (SAMS)** who meet the expanded special needs criteria identified in **OAC rule 5101:2-44-05.1**

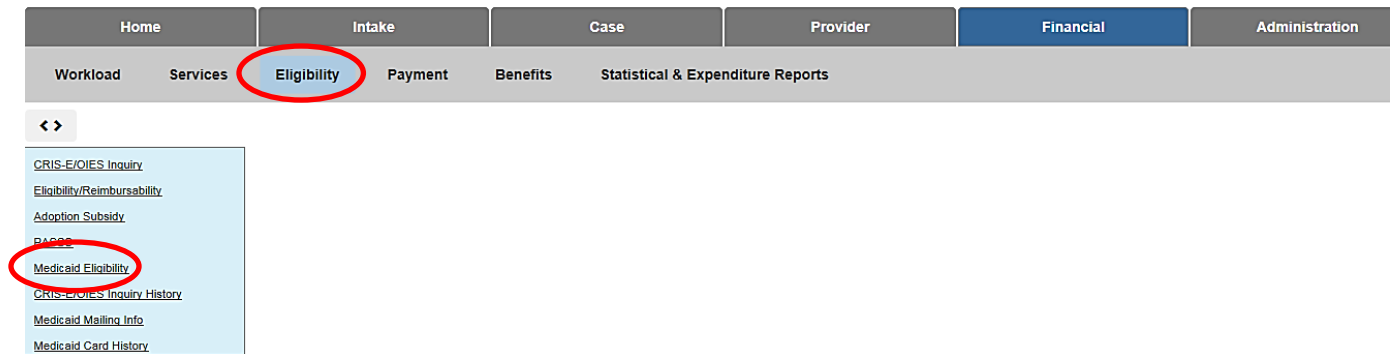
Completing a Medicaid Eligibility and Managed Care Plan Selection

Adding Managed Care Enrollment

1. From the SACWIS **Home** screen, click the **financial** tab.

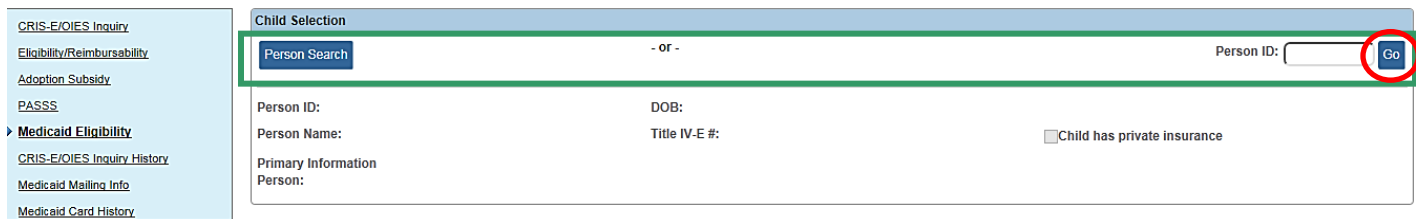


2. Click the **Eligibility** tab.



3. Select the **Medicaid Eligibility** link.

The **Child Selection** screen appears.



4. Enter the **Person ID** or use the **Person Search** button to locate the appropriate Child. (Shown in green above)

5. Click the **Go** button.

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **Person Results** page appears.

Person Search Results

Result(s) 1 - 15 of 120 / Page 1 of 8

	Person ID	Name	Street	City	State/Zip	Gender	Age	DOB	Active Case
select									
select									
select									
select									

6. Click the **Select** Link.

The **Child Selection** Screen Appears.

Child Selection

[Person Search](#) - or - Person ID: [Go](#)

Person ID: DOB:

Person Name: Title IV-E #: Child has private insurance

Primary Information Person:

Non IV-E Eligible Indicators

Custody Start Date	Placement Begin Date	Placement State	U.S. Citizen
09/10/2014	09/10/2014	OH	Yes

Medicaid Application History

Medicaid Type	Medicaid #	Application Type	Application Date	Requested Effective Date	Status
---------------	------------	------------------	------------------	--------------------------	--------

[Add Application](#)

Medicaid Eligibility History

Medicaid Type	Medicaid Number	Effective Date	Termination Date	Status
view IV-EFCM	<input type="text"/>	09/01/2014		Active - SACWIS

MCP Enrollment History

Created in Error Exclude Include

MCP Name	MCP ID/Number	Enrollment Date	Disenrollment Date	Notification Sent
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[Add MCP Enrollment/MCP Disenrollment](#)

7. Click the **Add MCP Enrollment/MCP Disenrollment** button.

Completing a Medicaid Eligibility and Managed Care Plan Selection

Note: If the button is grayed out, it's because enrollment is not available if a child is placed out of state, a child is currently enrolled, or they don't have Medicaid eligibility span.

The screenshot shows a web browser window with the URL <http://sacwisdey.odjfs.state.oh.us/sacwis/medicaidHMOenrollment.do>. The page contains several data sections:

- Person Information Table:**

Person ID	Name	DOB	Effective Date	End Date	Type
[Empty row]					
- Non IV-E Eligible Indicators:**

Custody Start Date	Placement Begin Date	Placement State	U.S. Citizen
09/10/2014	09/10/2014	OH	Yes
- Medicaid Eligibility History:**

Medicaid Type	Medicaid Number	Effective Date	Termination Date	Status
view IV-EFCM	[Redacted]	09/01/2014		Active - SACWIS
- MCP Enrollment History:**

Created in Error Exclude Include

MCP Name	MCP ID/Number	Enrollment Date	Disenrollment Date	Notification Sent
view edit CareSource		11/01/2016		No
- Stop Span History:**

Stop Span Effective Date	Stop Span End Date	Comments
[Empty row]		

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **MCP Enrollment Information** screen appears.

The screenshot shows the OhioSACWIS web application interface. At the top, there is a navigation bar with 'Home', 'Recent', 'Search', and 'Help' buttons. Below this, the breadcrumb trail reads 'Financial > Eligibility > Medicaid Eligibility'. The main form area is titled 'MCP Enrollment Information' and contains several fields: 'Medicaid Number', 'MCP Name', 'MCP Enrollment Date', 'MCP Disenrollment Reason', 'MCP ID/Number', and 'MCP Disenrollment Date'. A dropdown menu for 'MCP Name' is open, displaying a list of health plans. The 'Save' button at the bottom left is circled in red.

8. On the **MCP Enrollment Information** screen, select a **MCP name** from the drop down list. (shown in green above)
9. Choose the name of the plan being selected for each child from the dropdown list.
10. Click **Save**.

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Note: The enrollment date defaults to the beginning of the current month. The enrollment date cannot precede the Medicaid eligibility date or birthday. (Shown in blue below)

OHIO SACWIS

Financial > Eligibility > Medicaid Eligibility

Name: [redacted] Person ID: [redacted] DOB: [redacted] Last Modified Date/Time:

MCP Enrollment Information

Medicaid Number: [redacted]

MCP Name: * 236 CareSource MCP ID/Number: [redacted]

MCP Enrollment Date: * 11/01/2016 MCP Disenrollment Date: [redacted]

MITS Reported Disenrollment Reason:

MCP Disenrollment Reason: [redacted]

Comments

Created In Error

Created In Error Comments

Save Cancel

HELP & TRAINING PRIVACY & SECURITY AGENCY SEARCH ROM REPORTING BIC REPORTING 3.07-SNAPSHOT

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **Child Selection** Screen appears.

Note: Once record is created in error, the system generates a duplicate record which must be completed by the user. This is done because the child must be enrolled in a managed care plan.

11. Click **Edit** to Create to Edit or Dis-enroll in Error.

The screenshot shows a web browser window with the URL `http://sacwisdev.odfs.state.oh.us/sacwis/medicaidEligibilityHistory.do`. The page displays several data tables:

- Table 1:** Custody Start Date, Placement Begin Date, Placement State, U.S. Citizen. Row: 09/10/2014, 09/10/2014, OH, Yes.
- Medicaid Eligibility History:** Medicaid Type (IV-EFCM), Medicaid Number, Effective Date (09/01/2014), Termination Date, Status (Active - SACWIS).
- MCP Enrollment History:** Includes radio buttons for 'Created in Error' (selected), 'Exclude', and 'Include'. The table has columns: MCP Name, MCP ID/Number, Enrollment Date, Disenrollment Date, Notification Sent, Created in Error. The first row has 'CareSource', an empty ID, '11/01/2016', empty, 'No', and 'No'. The second row has 'CareSource', empty ID, '11/01/2016', '11/01/2016', 'No', and 'Yes'. A red circle highlights the 'edit' link in the first row.
- Stop Span History:** Columns: Stop Span Effective Date, Stop Span End Date, Comments. Includes 'Add Stop Span' and 'Restart Span' buttons.
- Medicaid Application History:** Columns: Medicaid Type, Medicaid #, Application Type, Application Date, Requested Effective Date, Status. Includes an 'Add Application' button.

The browser's address bar at the bottom shows the URL: `http://sacwisdev.odfs.state.oh.us/sacwis/medicaidHMOEnrollment.do?command.do(edit)=1&medicaidHmoEnrollmentId=172519&hmoMode=edit`.

Completing a Medicaid Eligibility and Managed Care Plan Selection

Editing Managed Care Enrollment

1. On the **MCP Enrollment Information** screen, select a **MCP Name** from the drop down list.
2. Select the correct plan from the drop down list.(shown in blue below)

The screenshot shows the OHIO SACWIS web application interface. The browser address bar displays the URL: <http://sacwisdev.odfs.state.oh.us/sacwis/medicaidEligibilityHistory.do>. The page title is "OHIO SACWIS" and the breadcrumb navigation is "Financial > Eligibility > Medicaid Eligibility".

The form displays the following fields:

- Name: [Redacted]
- Person ID: [Redacted]
- DOB: [Redacted]
- Last Modified Date/Time: [Redacted]

The "MCP Enrollment Information" section includes:

- Medicaid Number: [Redacted]
- MCP Name: * [Dropdown menu open, showing options: 235 Buckeye Community Health Plan, 236 CareSource (highlighted in blue), 237 Molina Healthcare of Ohio Inc., 238 Paramount Advantage, 239 United Healthcare Community Plan of Ohio, Inc.]
- MCP Enrollment Date: *
- MITIS Reported Disenrollment Reason:
- MCP Disenrollment Reason: [Dropdown menu]
- Comments: [Text area]
- Created In Error
- Created In Error Comments: [Text area]
- MCP ID/Number: [Text field]
- MCP Disenrollment Date: [Text field]

At the bottom of the form, there is a "Save" button circled in red and a "Cancel" button. A pagination control shows "500" records.

The footer contains navigation links: HELP & TRAINING, PRIVACY & SECURITY, AGENCY SEARCH, ROM REPORTING, BIC REPORTING, and a version indicator "3.07-SNAPSHOT".

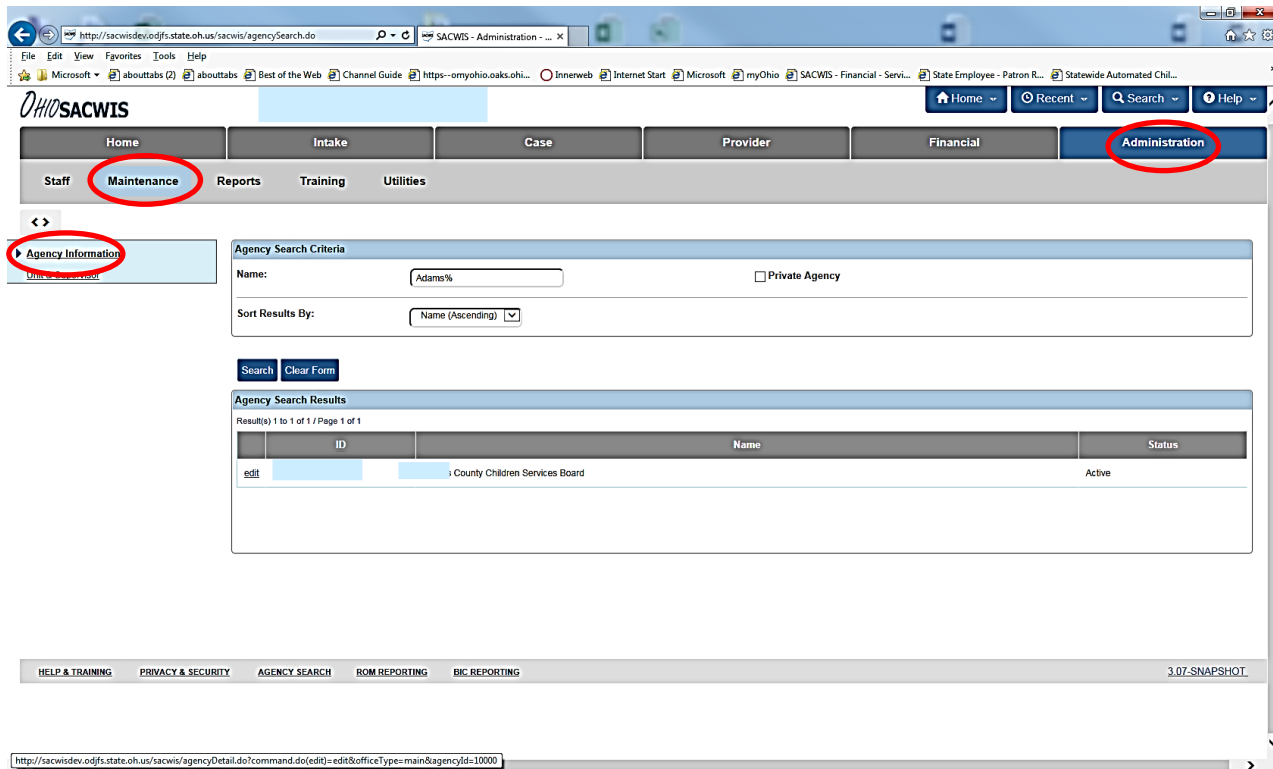
3. Click **Save**.

Completing a Medicaid Eligibility and Managed Care Plan Selection

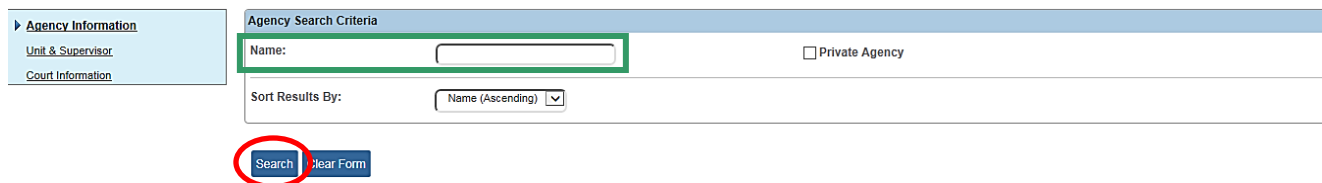
Adding Managed Care Contact

Note: The user must have Agency Information MCP Coordinator Security.

1. From the SACWIS home screen, click the **Administration** tab.
2. Click the **Maintenance** tab.
3. Click on **Agency Information**.



The **Agency Search Criteria** Screen appears.



4. Enter the **Agency Name followed by %**.
5. Click **Search**.

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **Agency Configuration Results** Page appears.

Name	Value	Effective Date	End Date
Levy County	true	01/01/2008	
BulkMCPFlag	true	01/11/2016	12/31/9999
McpContactName	63714	11/01/2016	
Alternative Response Live	true	06/16/2014	

Add Configuration

Accreditations

CWLA
 COA
 NASW

Apply Save Cancel

HELP & TRAINING PRIVACY & SECURITY AGENCY SEARCH ROM REPORTING BIC REPORTING 3.07-SNAPSHOT

6. Click **Add Configuration**.

The **Agency Configuration Details** page appears

OHIO SACWIS

Home Recent Search Help

Confin Details

Type: McpContactName

Start Date: End Date:

Person Search - or - Person ID:

OK Cancel

Agency Configuration History

Configuration Key	Value	Effective Date	End Date
McpContactName	11575473	11/25/2016	

7. In the dropdown, choose **MCP Contact Name**.

8. Click **Person Search**.

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **Person Search Criteria** screen appears.

The screenshot shows the OhioSACWIS Person Search Criteria screen. The 'Last Name' field is highlighted with a red box and contains 'jacwis'. The 'First Name' field contains 'susie'. The 'Advanced Search Criteria' section is expanded, and the 'Sort Results By' dropdown is set to 'Last Name Ascending'. The 'Person Search Results' table shows one result with Person ID 1099144 and Name 'Sacwis_Susie'.

Person ID	Name	Street	City	State/Zip	Gender	Age	DOB	Active Case
1099144	Sacwis_Susie							

9. Select **Person**.

10. Enter the **Start Date**.

11. Click **OK**.

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **Agency Configuration Results** page appears.

	Name	Value	Effective Date	End Date
edit	Levy County	true	01/01/2008	
edit	Alternative Response Live	true	03/03/2014	
edit	McpContactName	1099144	12/01/2016	

[Add Configuration](#)

Accreditations

CWLA
 COA
 NASW

Inactive Agency

Comments:

[Spell Check](#) [Clear](#) 200

12. Select **Save**.

OHIO SACWIS [Home](#) [Recent](#) [Search](#) [Help](#)

Config Details

Type:

Start Date:

End Date:

[Person Search](#) - or - Person ID:

[OK](#) [Cancel](#)

Agency Configuration History

Configuration Key	Value	Effective Date	End Date
McpContactName	11575473	11/25/2016	

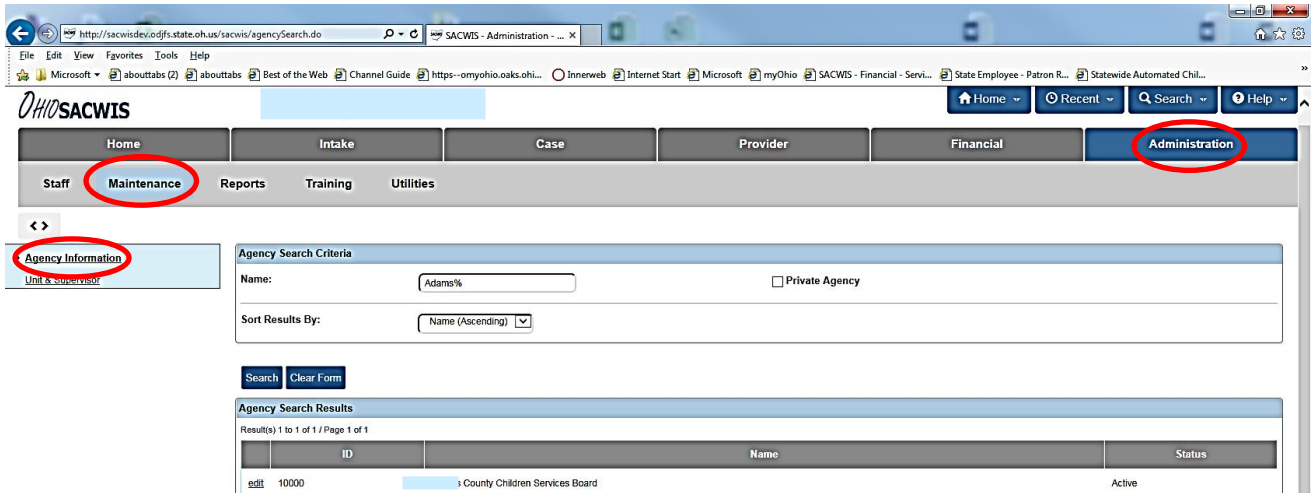
The **MPC Contact** is added.

Note: This person's name will display as the Primary Information Person on all child Medicaid eligibility records for the agency.

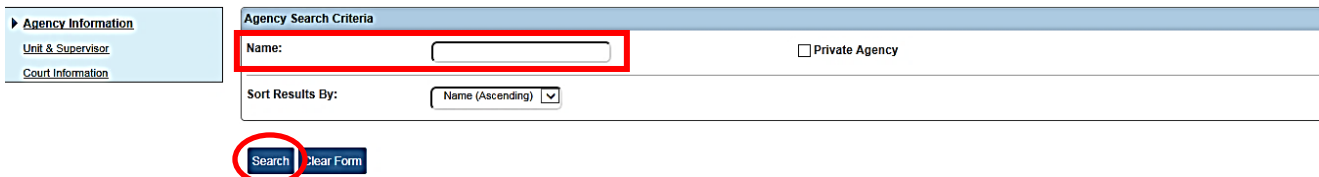
Completing a Medicaid Eligibility and Managed Care Plan Selection

Adding Bulk Managed Care Plan Flag

1. From the SACWIS home screen, click the **Administration** tab.
2. Click the **Maintenance** tab.
3. Click on **Agency Information**.



The **Agency Search Criteria** Screen appears.



4. Enter the **Agency Name** followed by %.
5. Click **Search**.

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **Agency Configuration Results** Page appears.

The screenshot shows a web browser window displaying the 'Agency Configuration Results' page. The browser's address bar shows the URL: <http://sacwisdev.odjfs.state.oh.us/sacwis/agencyDetail.do?command.do>. The page contains several sections: 'Add Contact', 'Staff' (with a table for Name and Title), 'Add Staff', 'Agency Configuration Results' (with a table of configurations), 'Accreditations' (with checkboxes for CWLA, COA, and NASW), and 'Apply', 'Save', and 'Cancel' buttons. The 'Add Configuration' button is circled in red.

Name	Value	Effective Date	End Date
Levy County	true	01/01/2008	
BulkMCPFlag	true	01/11/2016	12/31/9999
McpContactName	63714	11/01/2016	
Alternative Response Live	true	06/16/2014	

6. Click **Add Configuration**.

Completing a Medicaid Eligibility and Managed Care Plan Selection

The **Agency Configuration Details** page appears.

The screenshot shows the 'Agency Configuration Details' page in the OHIO SACWIS system. The page has a header with the OHIO SACWIS logo and navigation buttons (Home, Recent, Search, Help). Below the header is a form for 'Agency Details' with fields for Type, Start Date, End Date, and Value. The 'Type' dropdown menu is open, showing 'Bulk MCP Flag' selected. Below the form is a table titled 'Agency Configuration History' with columns for Configuration Key, Value, Effective Date, and End Date. The table contains three rows of data.

Configuration Key	Value	Effective Date	End Date
Lowr Counts	True	01/01/2008	
SecContactName	11575479	11/02/2016	
Alternative Residence List	True	05/01/2014	

7. From the dropdown list, select **Bulk MCP Flag**.

This screenshot is similar to the previous one but includes annotations. A green rectangular box highlights the 'Agency Details' form area. A red circle highlights the 'OK' button located below the form. The 'Bulk MCP Flag' option is still selected in the 'Type' dropdown menu.

8. Enter the **Start Date**.

9. Enter **True** in **Value Field**.

10. Click **OK**.

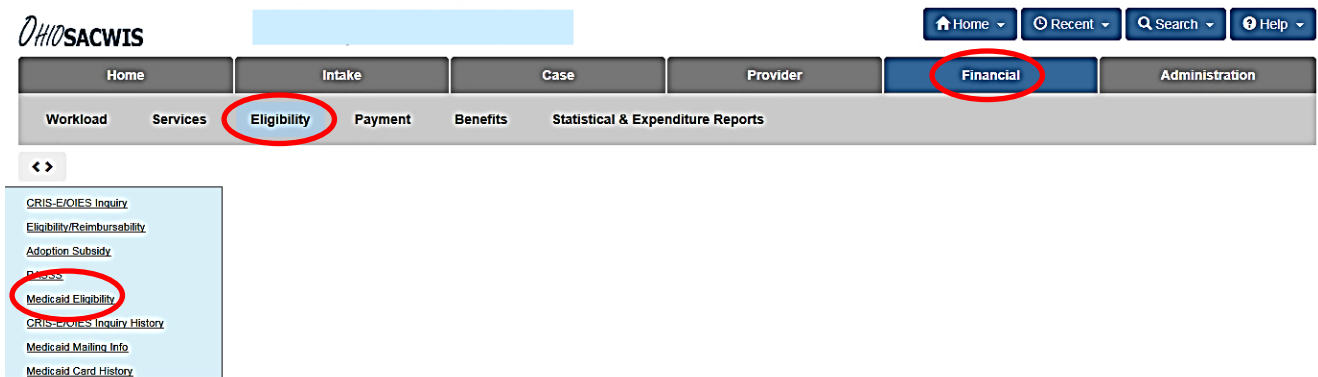
Completing a Medicaid Eligibility and Managed Care Plan Selection

Adding Authorized Representatives

Note: An agency can add up to two authorized representatives. The authorized representative will be communicated as an individual. The plans can communicate with on behalf of children they are serving.

An agency can add an Applicant I or Applicant II from a provider record as and Authorized Representative.

1. From the SACWIS **Home** screen, click the **financial** tab.
2. Click the **Eligibility** tab.
3. Click the **Medicaid Eligibility** link on the **Navigation** menu.



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The **Child Selection** page appears.

The screenshot shows the OhioSACWIS interface. The 'Eligibility' tab is active. The 'Child Selection' section includes a 'Person Search' field and a 'Person ID' field. Below this is a form for 'Current Medicaid Card Mailing Details' with fields for 'Provider ID', 'Origin of Information', 'C/O Name', and 'Address'. The 'Authorized Representative History' section has a filter set to 'Active' and a table with columns: Person ID, Name, DOB, Effective Date, End Date, and Type. Below the table are two buttons: 'Add Provider Members' (circled in red) and 'Add Other Members'. The 'Non IV-E Eligible Indicators' section has a table with columns: Custody Start Date, Placement Begin Date, Placement State, and U.S. Citizen.

4. To add a provider member, click the **Add Provider Member** button.

The **Add Provider Members** screen appears.

The screenshot shows the 'Add Provider Members' screen. It features a table with the following columns: Person Id, Name, DOB, Effective Date, End Date, and Type. The first row has a checked checkbox in the left margin. Below the table are 'Save' and 'Cancel' buttons, with 'Save' circled in red.

5. Select the **Adult Provider Member** to designate as an authorization representative.
6. Click **Save**.

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The **Child Selection** page appears.

The screenshot shows the OHIO SACWIS application interface. The top navigation bar includes 'Home', 'Intake', 'Case', 'Provider', 'Financial' (selected), and 'Administration'. The sidebar on the left lists various modules, with 'Medicaid Eligibility' selected. The main content area displays the 'Child Selection' form, which includes a 'Person Search' field, a 'Person ID' field, and a 'Go' button. Below the search fields are sections for 'Current Medicaid Card Mailing Details' and 'Authorized Representative History'. The 'Authorized Representative History' section shows a table with columns for Person ID, Name, DOB, Effective Date, End Date, and Type. The 'Add Other Members' button is highlighted with a red circle.

7. To add another person as an authorized representative, select the **Add Other Members** button.

This is a close-up view of the 'Authorized Representative History' section. It features a filter dropdown set to 'Active' and a table with columns for Person ID, Name, DOB, Effective Date, End Date, and Type. The table contains one entry with an 'edit' link. Below the table are two buttons: 'Add Provider Member' and 'Add Other Members', with the latter circled in red.

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The **Other Persons** screen appears.

Financial > Eligibility > Medicaid Eligibility > Add Authorized Representative

Name: [Redacted] Person ID: [Redacted] DOB: [Redacted]

Other Persons

Person Search or [Redacted]

Person ID: [Redacted]

Name: [Redacted]

DOB: [Redacted]

Effective Date: [Redacted]

End Date: [Redacted]

Representative Type: [Redacted]

8. Click **Person Search**.

Person Search Criteria

Prefix: [Redacted]

Last Name: [Redacted]

First Name: [Redacted]

Suffix: [Redacted]

Middle Name: [Redacted]

DOB: [Redacted] or From Age: [Redacted] To Age: [Redacted]

Gender: [Redacted] Race: [Redacted] Hispanic /Latino: [Redacted]

Person ID: [Redacted]

AKA Sounds Like

[HINT: AKA / 'Sounds Like' applies to last/first/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]

Advanced Search Criteria

Sort Results By: [Redacted]

Person Search Results

Result(s) 1 - 15 of 120 / Page 1 of 8

Person ID	Name	Street	City	State/Zip	Gender	Age	DOB	Active Case
<input type="button" value="select"/>	[Redacted]	[Redacted]	Canton	[Redacted]	Female	24	[Redacted]	
<input type="button" value="select"/>	[Redacted]	[Redacted]	Lima	OH 45801-2709				

9. Enter the **Person's Name**. (shown in red above)

10. Click the **Select** Link. (shown in green above)

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The **Other Persons Screen** appears.

Financial > Eligibility > Medicaid Eligibility > Add Authorized Representative

Name: [] Person ID: [] DOB: []

Other Persons

Person Search [] or [] Go

Person ID: []

Person Id : []

Name : SACWS, Build 1.100

DOB : []

Effective Date : [] []

End Date : [] []

Representative Type : []

Save Cancel

11. Enter the **Effective Date**.

12. From the dropdown list, choose a **Representative Type**.

13. Click **Save**.

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The **Child Selection** screen appears.

The screenshot shows the 'Child Selection' screen in the SACWIS system. The interface includes a navigation menu on the left with options like 'Account Details', 'SASS', 'Web Services', 'Medicaid Eligibility', 'Child Eligible Inquiry History', 'Medicaid Status Info', and 'Medicaid Card History'. The main content area is divided into several sections:

- Child Selection:** Includes a 'Person Search' field with a 'Go' button and a 'Person ID' field containing '1147876'. Below are fields for 'Person ID', 'DOB', 'Person Name', and 'File by E #'.
- Current Medicaid Card Mailing Details:** Includes fields for 'Provider ID', 'Origin of Information', 'CO Name', and 'Address'.
- Authorized Representative History:** Features a 'Filter' dropdown set to 'Active' and a table with columns: Person ID, Name, DOB, Effective Date, End Date, and Type. The table contains two rows of data.
- Non IV-E Eligible Indicators:** A table with columns: Caseload Start Date, Placement Begin Date, Placement State, and U.S. Citizen. It shows one row of data.
- Medicaid Eligibility History:** A table with columns: Medicaid Type, Medicaid Number, Effective Date, Termination Date, and Status. It shows one row of data.

If you need additional information or assistance, please contact the SACWIS Help Desk.