



# SNP Stakeholder Meeting for Seniors and People with Disabilities in Managed Care

11/4/19

Gretchen Ulbee, Manager of Special Needs Purchasing, DHS

# 1. Welcome and Introductions

1. Welcome and introductions - Gretchen Ulbee, Special Needs Purchasing, DHS
2. Account Validation Service (AVS)
3. Annual health plan selection
4. Plans available for 2020 and update on procurement
5. Contracting update
6. Letters: Enrollees turning 65
7. Stakeholder comments and questions
8. Wrap up and next meeting

## 2. Account Validation Service (AVS)

2) Sam Reyes, Health Care Policy, DHS



## Account Validation Service (AVS)

Health Care Eligibility and Access

- Overview of the AVS
- Authorization to obtain financial information
- Unreported financial accounts
- Transition group
- Questions?

# **Account Validation Service (AVS) Overview**

- Federal law requires states to use an electronic asset verification system

(Section 1940 of the Social Security Act)

- Implementation in Minnesota September 1, 2019
- Minnesota's system is called the Account Validation Service

# What is the AVS?

- A step in the eligibility process
- Validates the accounts reported
- Identifies unreported accounts
- 90% of the results should be returned within 10 days
- Results can be reported for up to 90 days



# The AVS is :

NOT a verification source

NOT able to do real time data  
exchange

AVS will provide information about accounts held at participating financial institutions:

- Checking
- Savings
- Christmas club
- CDs
- Trust accounts

AVS will **NOT** provide information about:

- Life insurance issued by insurance companies
- Property
- Purchases through a brokerage firm
  - Stocks
  - Bonds
  - Mutual funds
- Individual transactions such as deposits and withdrawals

# Impacted Groups

MA-ABD  
(Age 65+,  
Blind,  
Disability)

MSP  
(Medicare  
Savings  
Program)

MA-LTC  
(long term care)  
Waivers and  
LTCF with an  
ABD basis

EPD  
(Employed  
Persons with  
Disabilities)

# When the AVS is Required

- Application
- Change in eligibility basis to MA-ABD with an asset test
- Renewal

**Authorization to Obtain  
Financial Information**

# Authorization to Obtain Financial Information

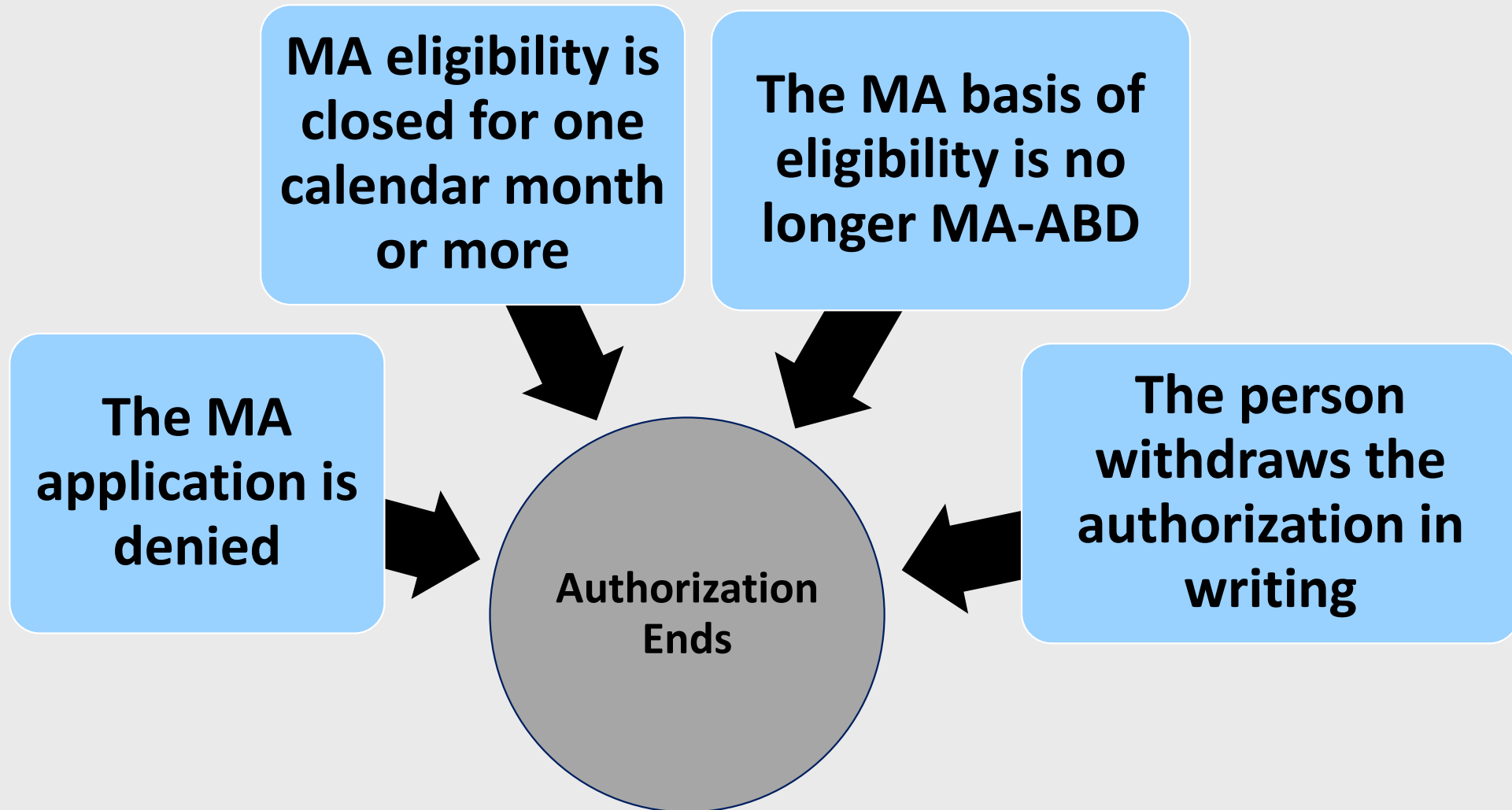
- To be eligible for MA, the applicant or enrollee must sign the Authorization to Obtain Financial Information from the Account Validation Service (AVS) form ([DHS-7823](#)).
- The form (DHS-7823) must also be signed by the following people, if their assets deem to the applicant or enrollee:
  - spouse
  - sponsor
  - sponsor's spouse

# Authorization to Obtain Financial Information Continued

- No other authorization or release form may be used in place of the Authorization to Obtain Financial Information form (DHS-7823).
- Any person who has the authority to act on a person's behalf may sign the authorization to obtain financial information form.
- The authorization must be kept in the person's file.



# Authorization Duration



# Unreported Assets

# Unreported Accounts

- Information received about an account through the AVS that was not reported is treated as inconsistent information.
- The worker must contact the applicant or enrollee to resolve the inconsistency.
- Workers must assist people to resolve the inconsistent information.
- The application remains pending or MA continues while the person is cooperating with resolving the discrepancy.

# **AVS Transition Group**

# Current Enrollees

Enrollees who applied before September 1, 2019, are required to sign the authorization form as a condition of eligibility.

- DHS will send a request for information and the Authorization to Obtain Financial Information form (DHS-7823) to current MA-ABD, MA-EPD, MA-LTC, and MSP enrollees who have an asset test and who have a renewal due in 2020.
- Mailing will occur in monthly increments beginning in September 2019, with the final mailing in April 2020.
- The request for information will explain the requirement to authorize DHS to request information through the AVS and request the return of the signed authorization form (DHS-7823) to the agency within 10 days.

# Important Notes

- Enrollees must not lose MA eligibility due to not signing the authorization to obtain financial information before their mailing date.
- Workers must assist enrollees who are cooperating or attempting to cooperate.

# Questions

# 3. Annual Health Plan Selection

- 3) Annual Health Plan Selection: Gretchen Ulbee, Special Needs Purchasing, DHS
- Open enrollment runs until December 5; letters started going out early October
  - No change in health plans offered in most counties for SNBC and Seniors
  - More options for Integrated SNBC in over 40 counties through existing plans
  - People age 65 and older enrolled in SCHA must change health plan if residing in Todd, Morrison or Wadena counties; special letter sent to MSHO enrollees
  - No health plans available in Morrison, Todd and Wadena for people under age 65 with disabilities enrolled in SCHA



# 4. Plans Available for 2020 and Update on Procurement

4) Plans available for 2020 and update on procurement : Gretchen Ulbee, Special Needs Purchasing, DHS

- DHS issued request for proposals for the Seniors and Families and Children contracts for 2020.
- Proposals were submitted and scored, a lawsuit was filed and many counties requested mediations. DHS cancelled the 2020 procurement, resulting in no changes in health plan service areas due to procurement in 2020.

# 5. Contracting Update

5) Contracting update: Gretchen Ulbee, Special Needs Purchasing, DHS

New requirement: Minimum payment rates for managed long term services and supports

## 6. Letters: Enrollees turning age 65

6) Letters - Enrollees turning age 65: Gretchen Ulbee, Special Needs Purchasing, DHS

- Development work underway to automate letters for all people turning age 65
- Thanks to stakeholders for help in improving the wording of the letters

# 7. Stakeholder comments and questions

7) Stakeholder comments and questions : Gretchen Ulbee, Special Needs Purchasing, DHS

# 8. Wrap Up and Next Meeting

8) Wrap up and next meeting- Gretchen Ulbee, Special Needs Purchasing, DHS

# Thank you

Special Needs Purchasing, DHS

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