Expedite

Medicaid Staff User Training

June 24, 2013

Welcome To Expedite

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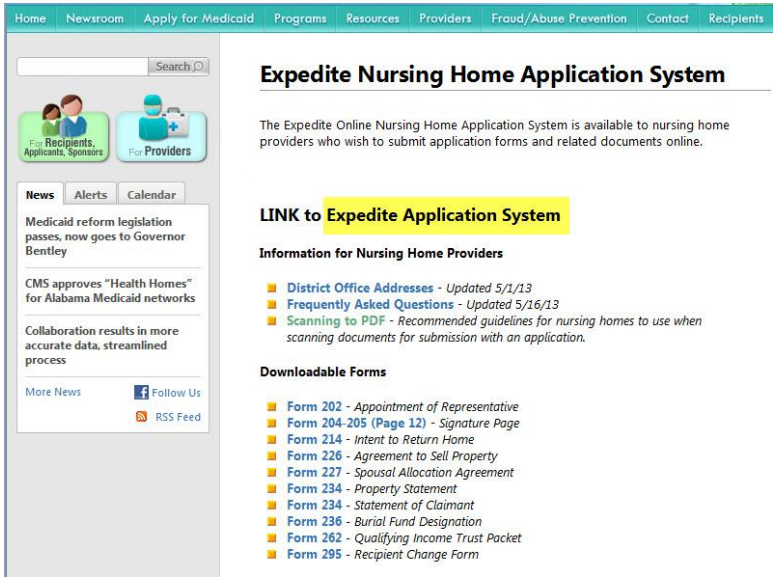
Expedite is Alabama Medicaid's new Medicaid Application Web Portal. Expedite is designed to provide a simple interface for users to complete and submit an electronic application for Medicaid benefits online.

Using Expedite ensures immediate receipt of Medicaid applications by the Medicaid Agency which in turn benefits eligible applicants by securing their accrual date. Uploading supplemental forms and trailing documents within the Expedite System also guarantees that these items are received in a timely manner and will remain associated to the correct online application.

Getting Started

Access the Expedite web portal

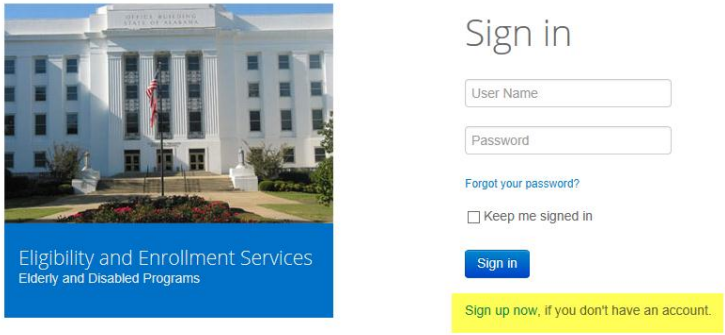
1. Open your Web Browser (Internet Explorer, Mozilla, Firefox, Safari, Opera, Google Chrome, etc.) to the Medicaid.Alabama.gov site.
2. Click **Apply for Medicaid**.
3. Click **Expedite Application**.
4. Select **Expedite**

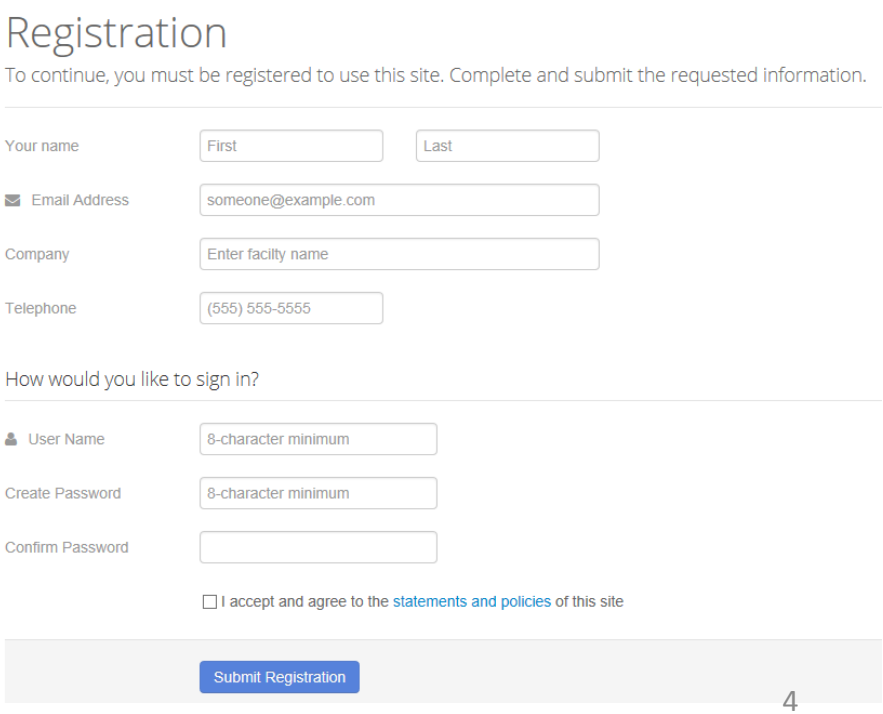


Register

Users new to the Expedite System must Register prior to using the site. Once the user registration has been approved, the Expedite System will generate a confirmation email.

1. Click Sign Up Now.
2. Completing the registration form.
   - Complete all registration fields.
   - An accessible, valid, and unique email address is required.
   - Enter your DO or CSC name in the Company field.
   - Your password must be at least 8 characters in length.
3. Read and check the box indicating you accept and agree to the statements and policies of this site.
4. Click **Submit Registration**.



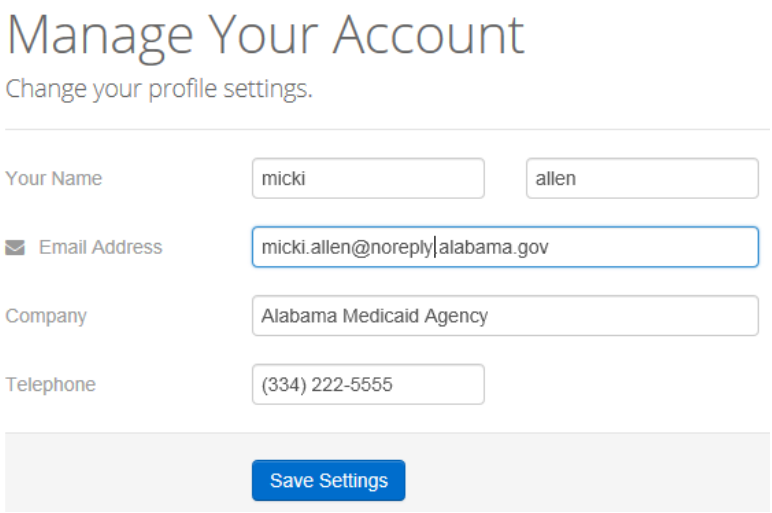


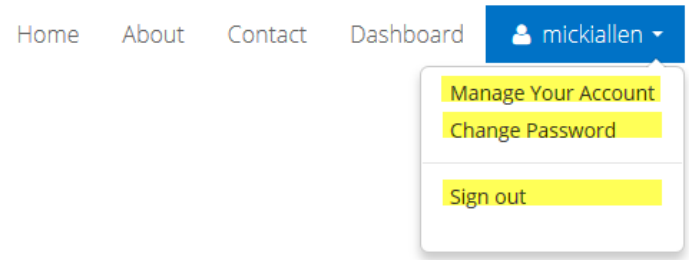
Sign In

Once new users have registered and received a registration confirmation email, they can begin to use the Expedite System.

1. Navigate to the Expedite home page.
2. Enter User Name.
3. Enter Password.
4. Click **Sign in**.

Manage Your Account





Expedite users can manage their own user accounts (i.e. name change, phone change, etc.). Account management options are located beneath the user profile menu. Click the drop down arrow and select a task to perform.

Manage Your Account

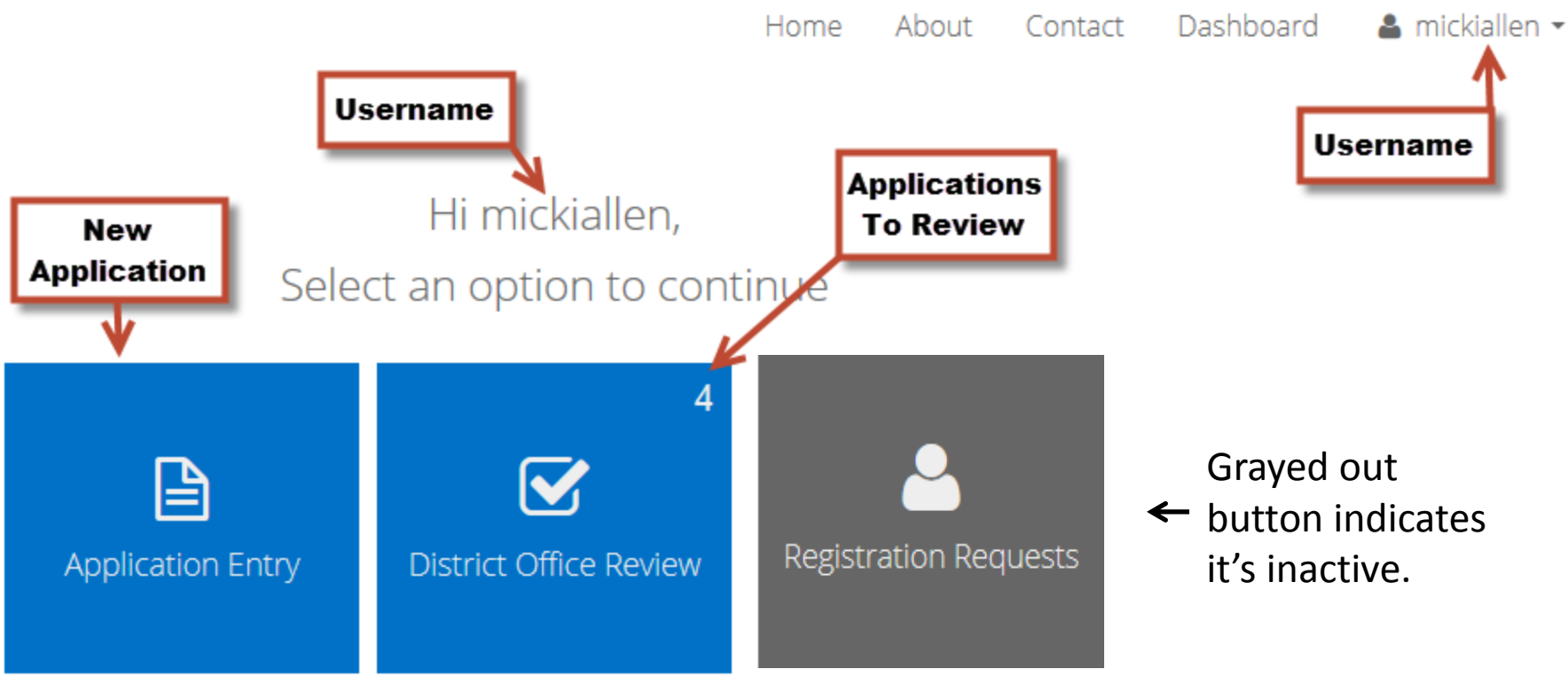
Users can update the following fields:

Name	Email
Company	Telephone

Change Your Password

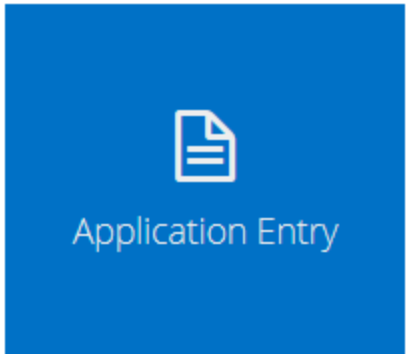
Expedite passwords must be at least 8 characters in length.

Medicaid Staff User Dashboard

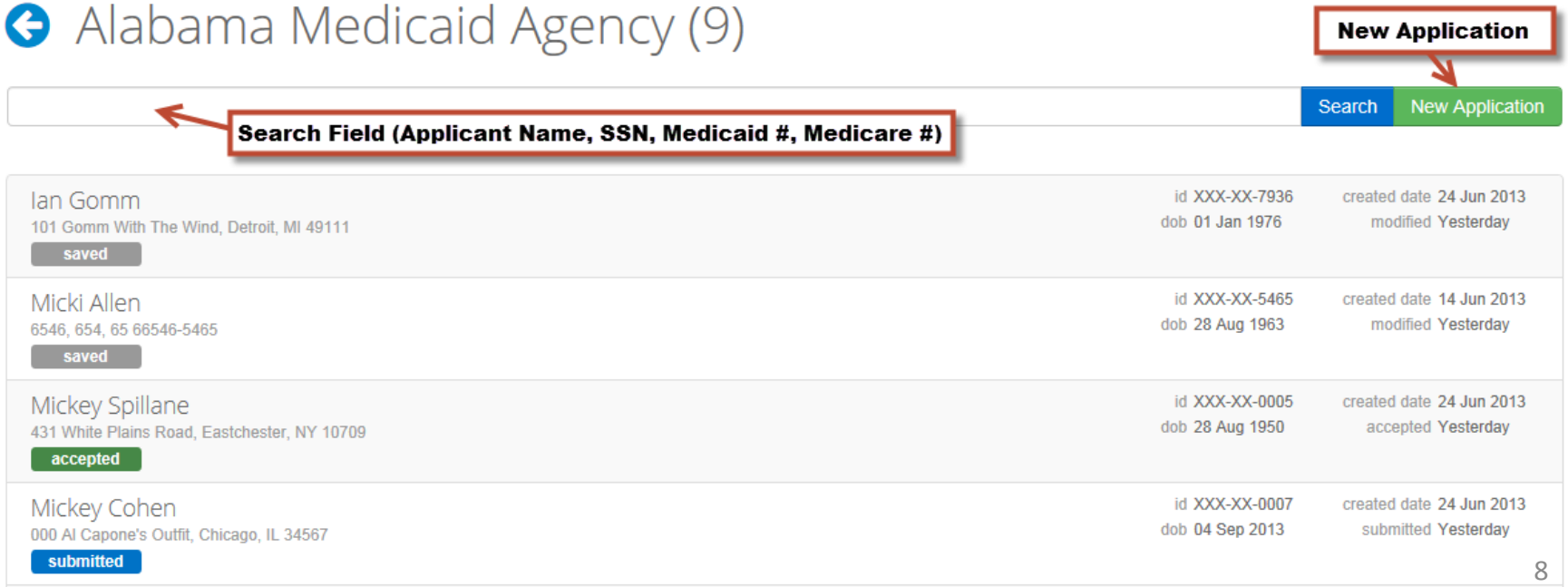


Grayed out button indicates it's inactive.

Application Entry Button



Selecting the **Application Entry** button from the Dashboard displays a list of applications submitted by the current user, a **search** field for locating applications, and a **New Application** button for creating a new application.



Application Process

The Expedite system is an online version of the Alabama Medicaid Application. The online application is designed in sections imitating to a great degree the printed application.

Users may select to be "guided" through the application using the Save and Continue button at the bottom of a page OR navigate directly to a specific page using the Application Menu at the top of page. Validation and conditional coding is in place within Expedite prohibiting the submission of an incomplete application.

Applicant	Sponsor, Legal, & Veteran Status	Living Arrangement	Residence
Sponsor	Spouse / Former Spouse	Veteran	Household Members
Income, Property, & Resources Sta...	Income	Property	Resources
Insurance & Personal Property Sta...	Insurance	Personal Property	Attachments

Save and Continue

Skip This Section

The Online Medicaid Application process provides the ability to save an application for completion at a later date. Saving an application does not submit it to the Alabama Medicaid Agency. Once saved, the applicant (or sponsor) may return at any time to finish the application and submit it for processing.

Navigating Expedite

Please do not use the **'BACK'** button on your browser when navigating through Expedite. Expedite users will have access to the site menu, application menu, and embedded navigational buttons to use while moving throughout the system.

Expedite Site Menu → Home About Contact Dashboard mickiallen

Expedite Application Menu ↓

Applicant	Sponsor, Legal, & Veteran Status	Living Arrangement	Residence
Sponsor	Spouse / Former Spouse	Veteran	Household Members
Income, Property, & Resources Status	Income	Property	Resources
Insurance & Personal Property Status	Insurance	Personal Property	Attachments

If you have begun an application and use the browser's **'BACK'** button, the system will return you to the application listing. The application you were working on will be listed as "Saved." You may select the application to complete it.

Alabama Medicaid Agency (8)

Search New Application

Micki Allen
6546, 654, 65 66546-5465
saved
id XXX-XX-5465 created date 14 Jun 2013
dob 28 Aug 1963 modified Today

Mickey Spillane
id XXX-XX-0005 created date 24 Jun 2013

Navigating Expedite

(continued)

Users may use the application menu to navigate directly to a particular page. Use the hide menu icon to hide the application menu and expose the site menu.

Users may also use the **'BACK'** icon within Expedite to move backwards through the application pages. *Please remember not to use the browser's back button.

Attachments

Some sections of the online Medicaid Application require the attachment of documents and forms (e.g. bank statements, deeds to assets, etc.). In order to attach the required forms and documents you must first scan the hard copies.

The Expedite system accepts only files that have been saved and/or scanned in PDF format. PDF files are secure and because of their smaller size, efficient for use with the Expedite System. The maximum file size for Expedite attachments is 2 MB.

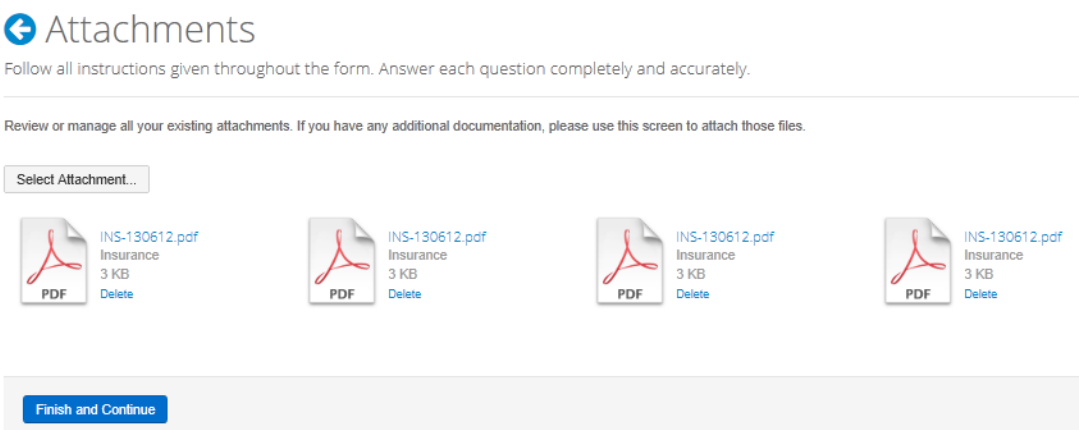
1. Click Select Attachment.
2. Browse to locate PDF file.
3. Select the PDF File to attach.
   - It is preferable that common files be scanned as one document as size permits. For example, if you have 5 bank statements to attach, applicants may be able to scan the bank statements together and upload them as one document depending on file size outcome.
   - Verify all attached files are legible - do so during scanning process.
4. Select Insert.

Attachment Overview

The last section on the Application Menu is Attachments. Attachments is purposely position at the end of the application process to provide users an opportunity to view and verify attachments before submitting the application.

Applicant	Sponsor, Legal, & Veteran Status	Living Arrangement	Residence
Sponsor	Spouse / Former Spouse	Veteran	Household Members
Income, Property, & Resources Status	Income	Property	Resources
Insurance & Personal Property Status	Insurance	Personal Property	Attachments

1. Navigate to the Attachments section of Expedite.
2. Preview to verify each document belongs to the selected record, is complete, and is legible.



NOTE: You may continue to attach documents in the Attachment area even after an application has been submitted.

Required Forms

Online Medicaid Applications must be accompanied by the following two forms:

1. Completed Form 202 Appointment of Representative Document assigning Appointment of Representative to the Nursing Home Facility submitting the online application.
2. Signed Agreement and Affirmation Signature Page.

Both of the required forms can be downloaded from the Expedite Site located on the Alabama Medicaid Website (Medicaid.Alabama.gov).

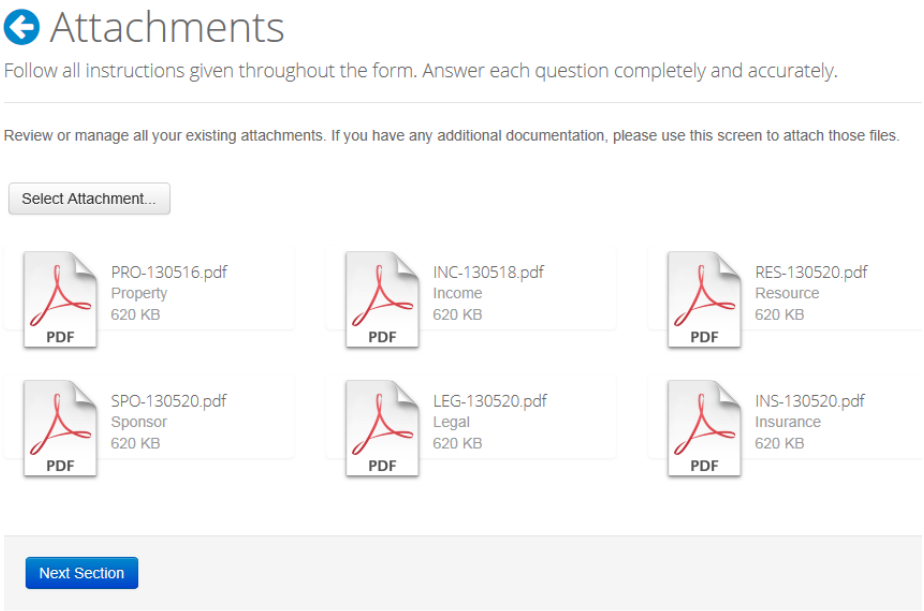
1. Download forms to desktop or other location.
2. Print forms.
3. Complete and sign forms.
4. Scan forms in PDF File Format.
5. Upload scanned forms by clicking the Select Attachment button located on the Expedite Sponsor, Legal, and Veteran Status page.

NOTE: Expedite will not allow applications to be submitted without the inclusion of these two documents.

Trailing Documents

Documents received after an online application has been **submitted** and is being **processed** are referred to as **Trailing Documents** and must be uploaded within the Attachment Section.

1. Sign in to Expedite.
2. Navigate to the Attachment section of Expedite.
3. Click **Select Attachment**.
4. Locate and upload the trailing documents.
5. Preview to verify document belongs to selected record, is complete, and is legible.



Status Codes

The status code reflects the step an application is currently in within the application process.

Saved	Application previously initiated but not submitted.
Submitted	Application submitted awaiting processing.
Processing	Application submitted and being processed.
Incomplete	Application returned following submission for updating and resubmission.
Accepted	Application accepted for eligibility consideration.
Rejected	Application rejected for eligibility consideration.

Editing an Application

Expedite Applications may only be edited by the submitting user. Submitting users may only edit an application when it is in either a **Saved** or **Incomplete** status.

Edit View

Status Code = **Saved**
Incomplete

Read Only View

Status Code = **Submitted**
Processing
Accepted
Rejected

MS User Tasks and Experience Within Expedite

Expedite & AMAES
How are they connected?

Approved Expedite applications are delivered nightly to AMAES in a process referred to as a batch exchange. During the batch exchange, AMAES reviews preliminary eligibility criteria (e.g. existing Medicaid Application). The batch exchange process is scripted to approve or reject applications based on the presence and comparison of information currently in AMAES.

Applications **approved** during the exchange are added/updated into **AMAES** for MS User processing. Approval by AMAES updates the application's **Expedite** status code to **Approved**.

Applications **rejected** during the exchange process are not added/updated into **AMAES**. Rejection by AMAES updates the application's **Expedite** status code to **Rejected**.

Expedite Application Decision

MS User Expedite Decision

Approve

↓

Daily Batch Exchange with AMAES

↓

Approved by AMAES for processing

↓

Expedite Status Code Updated to **Approved**

↓

Rejected by AMAES will not be processed

↓

Expedite Status Code Updated to Rejected

Reject

↓

Expedite Status Code Updated to Incomplete

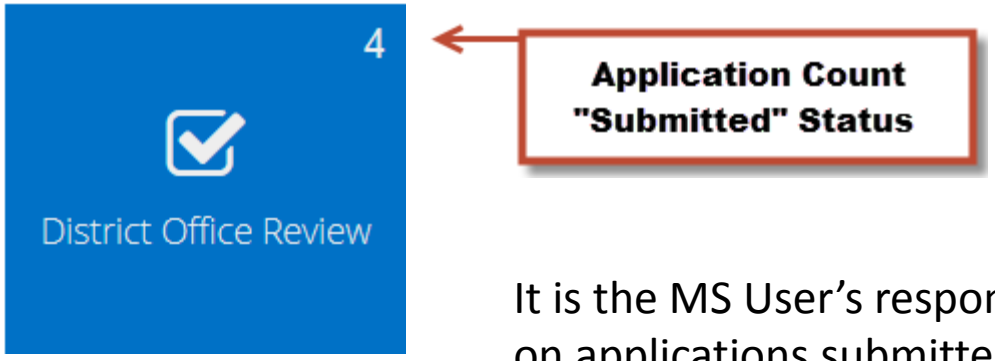
↓

NH User corrects Expedite application and resubmits

↓

MS User Decision

District Office Review Button



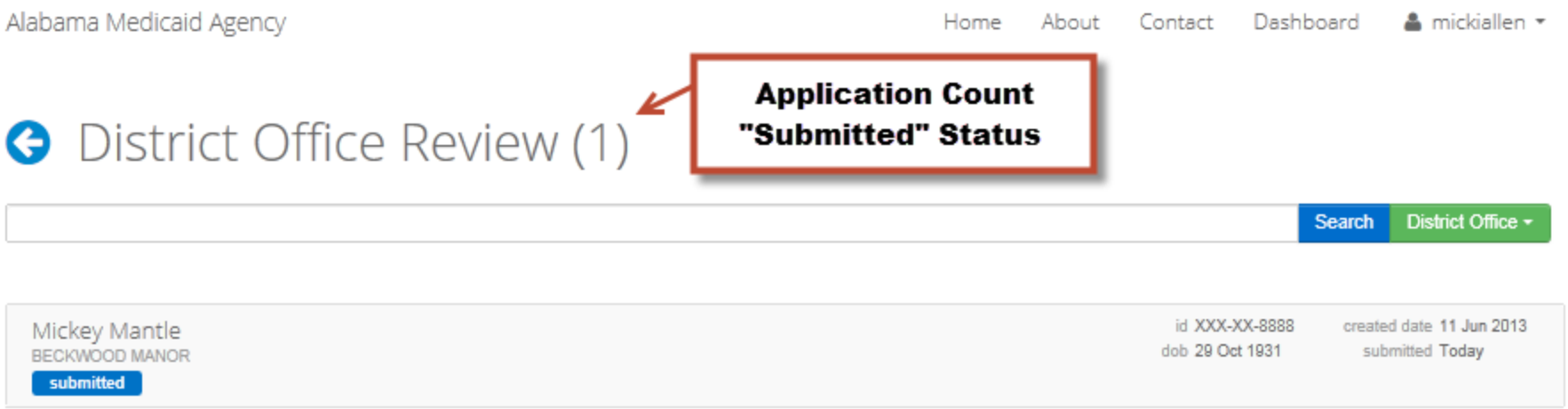
It is the MS User's responsibility to review and take action on applications submitted using Expedite. At a minimum, MS Users should review **Submitted** Expedite Applications on a daily basis throughout the work week.

Once an MS Users has signed into Expedite, the **District Office Review** button will be visible. The current count of unprocessed **Submitted** applications will appear in the upper right corner of the button.

MS Users may access the unprocessed **Submitted** applications by clicking on the **District Office Review** button.

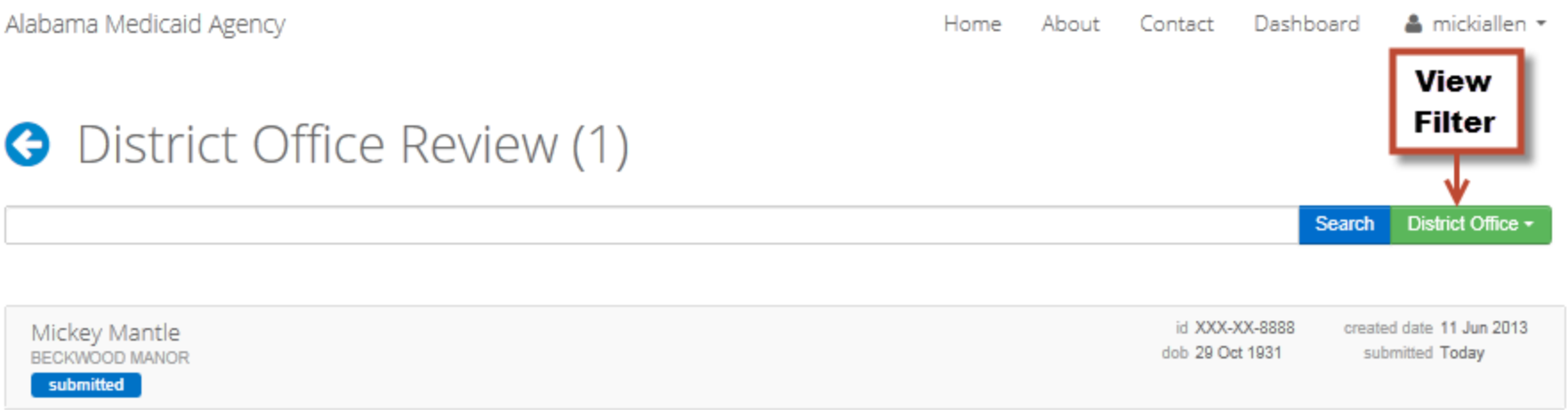
Submitted Status Applications Displayed By Default

The District Office Review page is designed to display applications with a **Submitted** status code and the view filter delivers the last view selected. The design efficiently shows applications that require processing by an MS User.



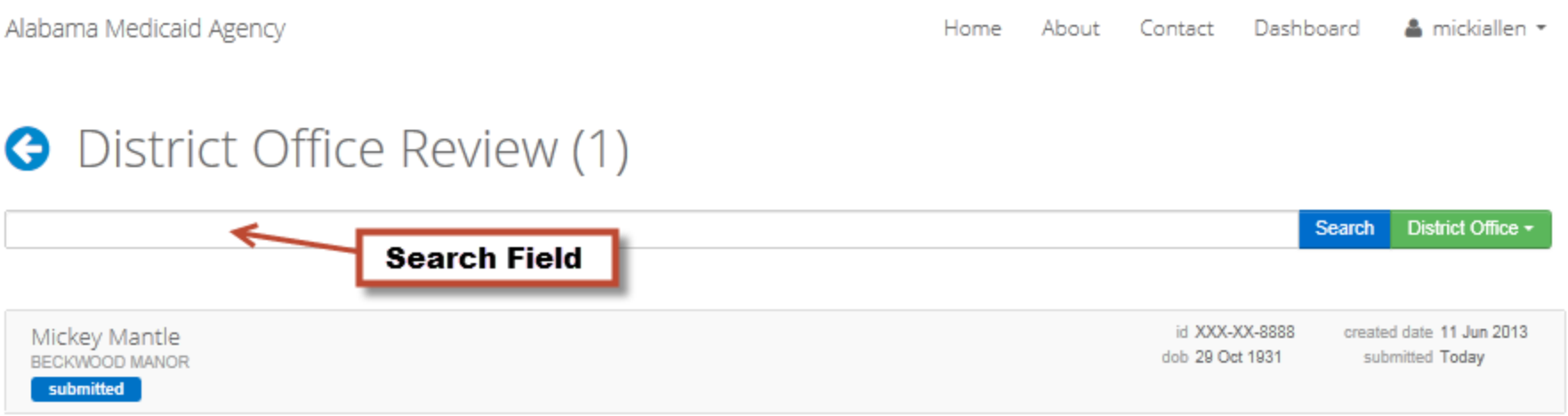
View Filter

Select a particular District Office from the dropdown list to filter **Submitted** status applications by a specific DO. Select "All" from the dropdown list for a Statewide list of applications in **Submitted** status. By default, the view filter delivers the last view selected. Simply select another DO or "All" from the list to select a different view.



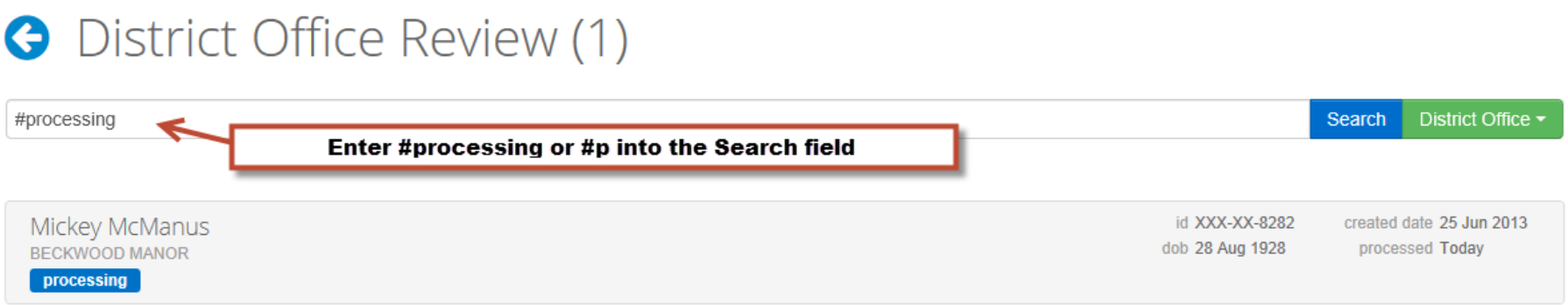
Application Search

Applications may be searched by name, SSN, Medicaid #, and Medicare #. Select a particular District Office from the dropdown list to filter **Submitted** status applications by a specific DO. Select "All" from the dropdown list for a Statewide list of applications in submitted status.



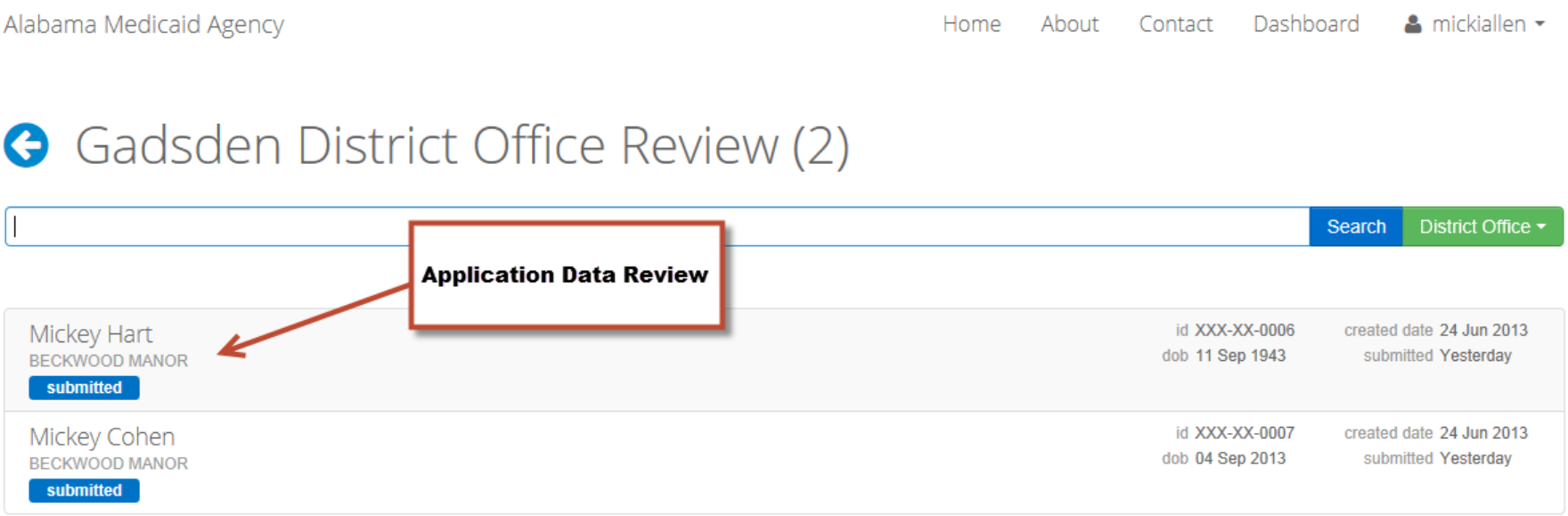
Searching For **Processing** Applications

By default, the District Office Review application list is filtered to display **Submitted** status applications. If you wish to display applications in **Processing** status awaiting the nightly batch exchange, enter **#processing** or **#p** into the **Search** field.



Application Data Review

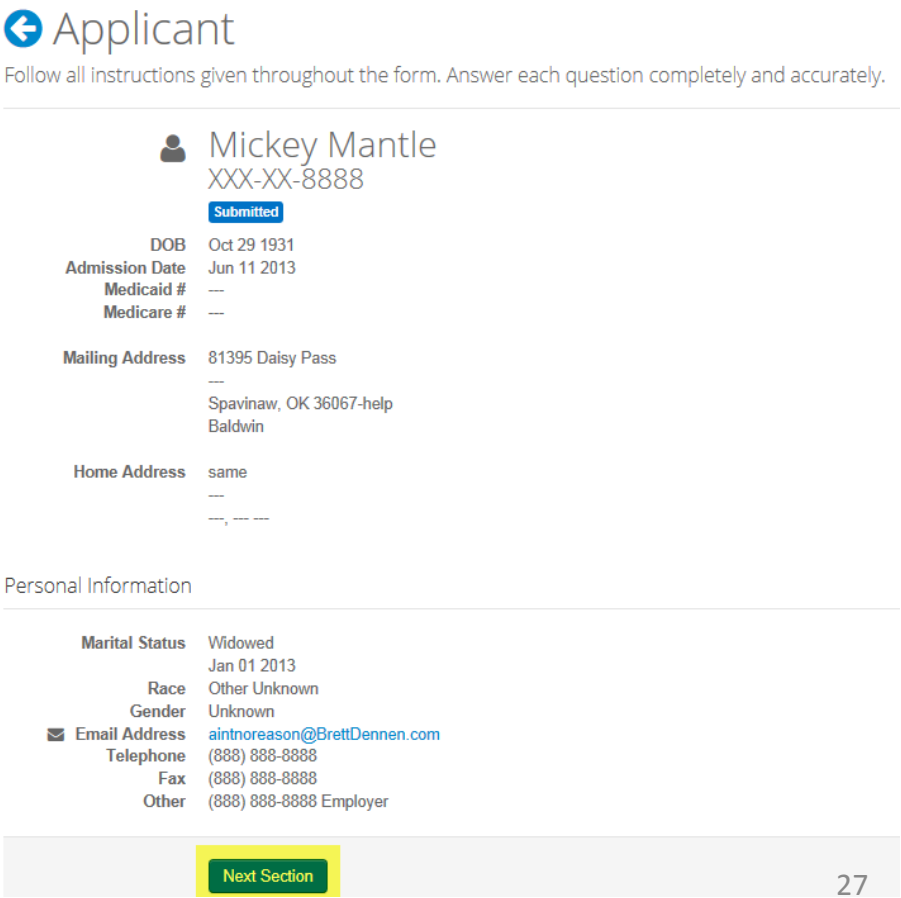
Click on the record to open an application for review.



MS User Application Review

During the Expedite Application review process, MS Users will move through the **Submitted** application reviewing each section and printing as desired.

1. Click the Expedite application that you wish to review.
2. Review each section.
3. You may create a case file hard copy of the application by using your browser print options to print each section as you review it.
4. Click **Next Section** to advance through the Expedite Application.

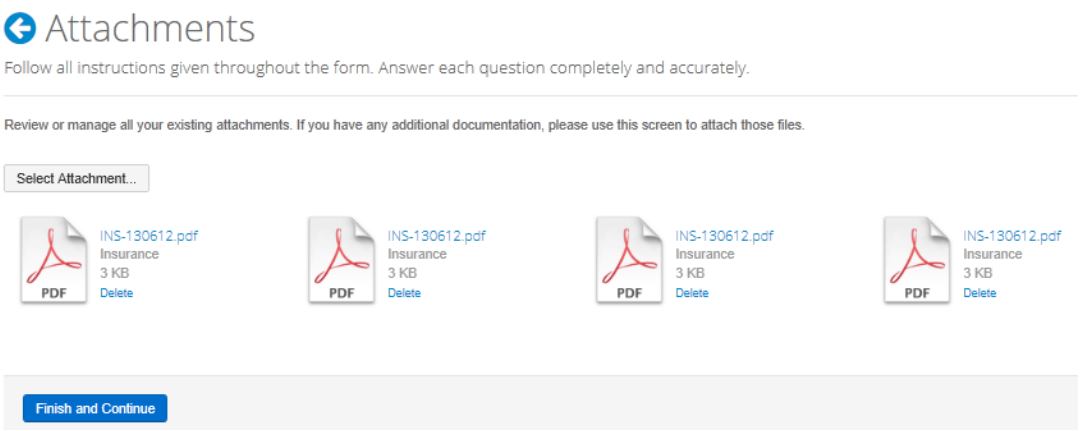


MS User Attachment Review

Applicant	Sponsor, Legal, & Veteran Status	Living Arrangement	Residence
Sponsor	Spouse / Former Spouse	Veteran	Household Members
Income, Property, & Resources Status	Income	Property	Resources
Insurance & Personal Property Status	Insurance	Personal Property	Attachments

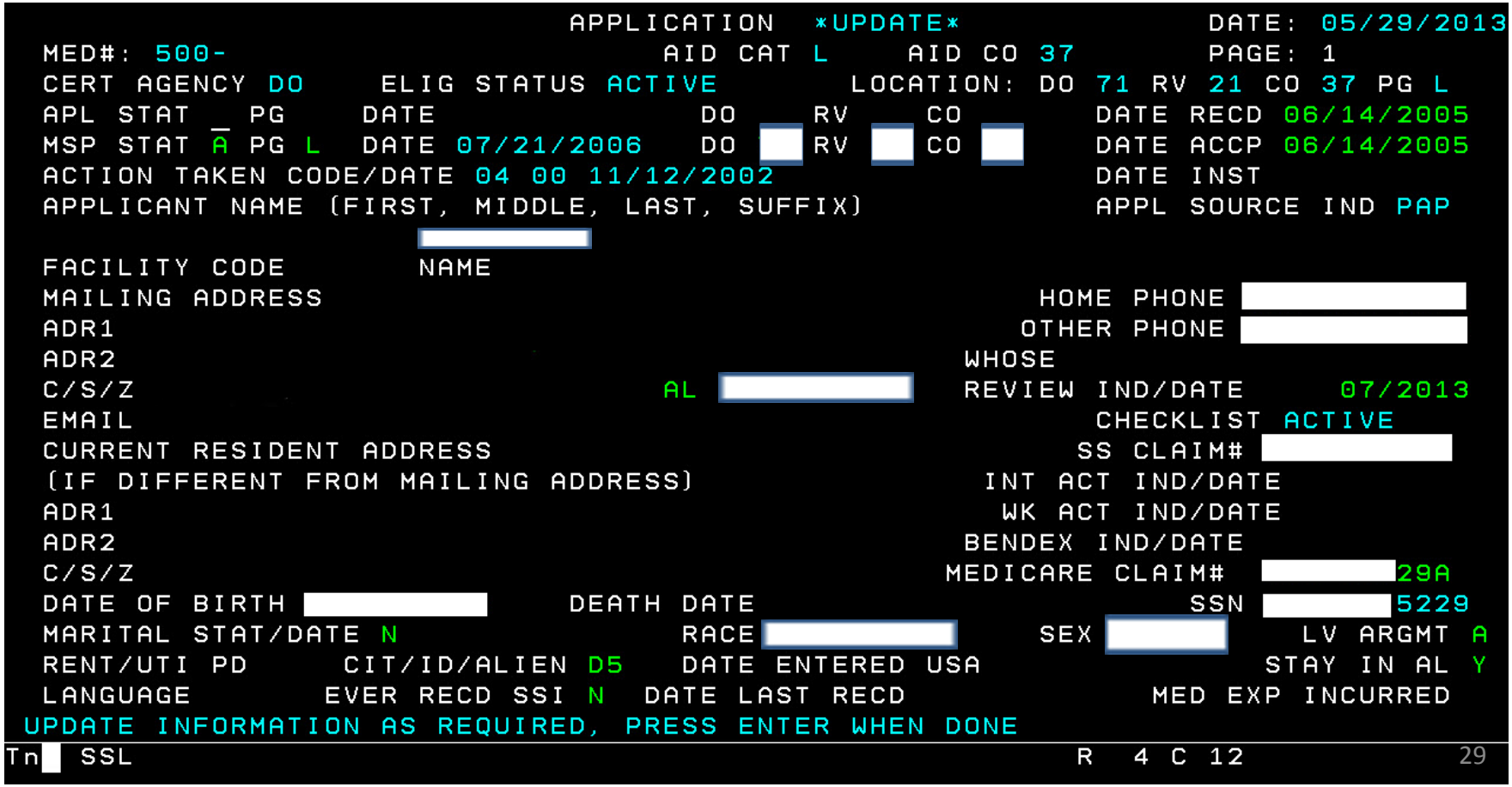
MS Users are responsible for verifying that each document belongs to the selected record, is complete, and is legible. Double clicking an attachment opens it for review in Adobe. Attachments may be printed when opened using the Adobe print options.

1. Navigate to the Attachments section of Expedite.
2. Preview each document.
3. Print as appropriate.



AMAES Research

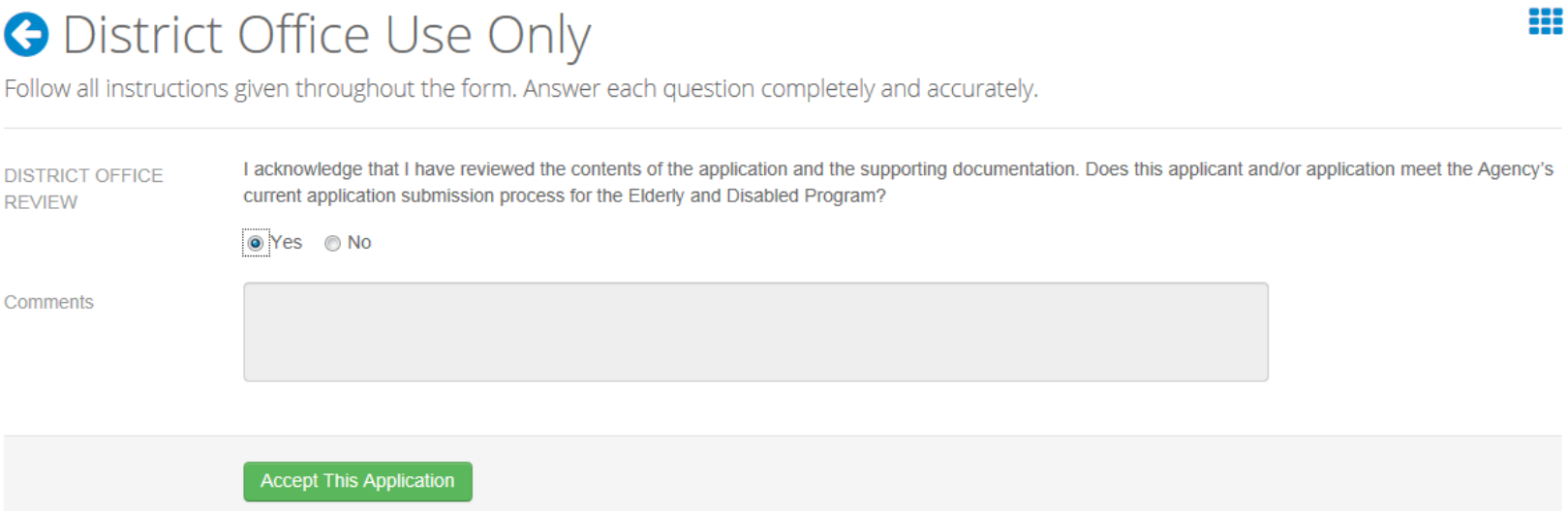
Medicaid Users review each application **Submitted** to the Expedite System comparing it with any current or previous AMAES record. The AMAES research for applications submitted via Expedite is the same as those received in-person or by mail.



Expedite Accept

After an Expedite application has been reviewed by Medicaid Staff, the MS User will select either to **Accept** OR **Reject** the application. If **Accepted**, the application remains coded as **Processing** within Expedite and is moved to the next step in the eligibility determination process where it will be worked by an MS User in AMAES.

It is the intention of the online application process to **ACCEPT** Expedite Applications so that they can be processed for eligibility determination by an MS User once they are automatically imported into the AMAES System.



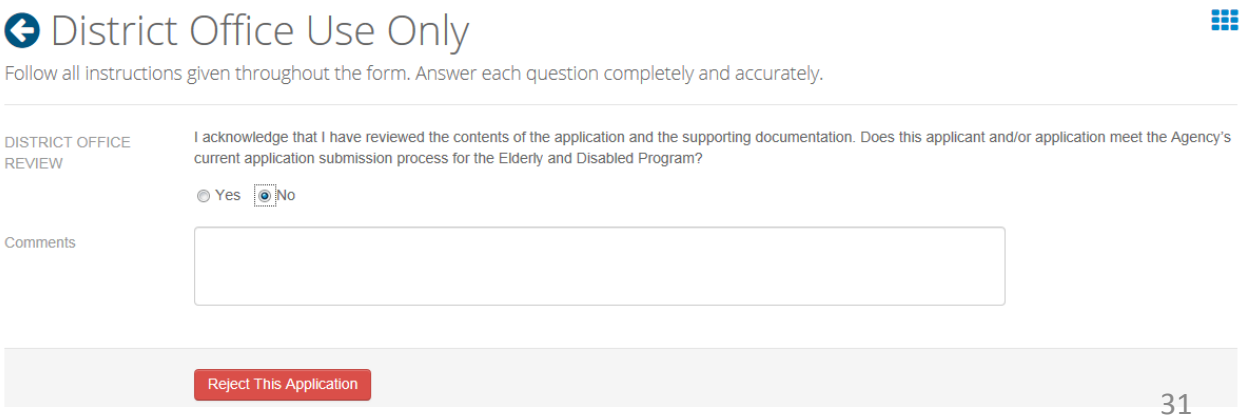
Expedite Reject

Rejecting an application submitted through Expedite does not render the application void or cancelled. Instead, once **Rejected**, the **Processing** Status Code is changed to an **Incomplete** Status Code in Expedite. The **Incomplete** Status Code is important because it allows the applicant to edit the application in Expedite according to the comment(s) the MS User enters into the **Comments** field.

The **only reason to reject** an application within Expedite is due to missing or illegible required forms. The two required forms are:

1. Completed Form 202 Appointment of Representative assigning Appointment of Representative to the Nursing Home Facility submitting the online application.
2. Signed Agreement and Affirmation Signature Page.

MS User must complete the rejection "Comments" field.



Expedite No Action

Taking no action on a submitted Expedite application leaves the application untouched (in **Submitted** status) in the Expedite queue. MS Users would choose this approach in all cases where active and pending applications exist for the applicant in AMAES. The MS User should refrain from **Accepting** the Expedite Application until they have researched and resolved any potential conflicts these scenarios might cause in AMAES.

Once the current active or pending application has been resolved, the MS User will **Accept** the **Submitted** Expedite Application. Doing so will move the application into AMAES for eligibility determination processing by the MS User.

Taking No Action Leaves The Application in the Expedite Queue.

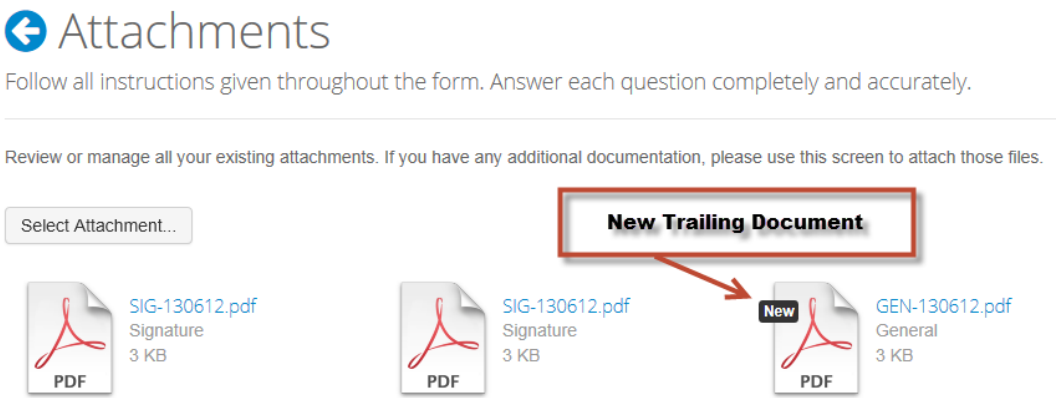
Expedite Action Dependent on AMAES Data

Application Scenarios	Expedite Action	Next Step(s)
No Application In AMAES	Accept	Follow current policy to work Expedite Application in AMAES.
Pending Application In AMAES	No Action	Resolve Pending Application in AMAES before accepting Expedite Application.
Active NH Application in AMAES	Accept	AMAES will reject Expedite Application.
Active Waiver Application in AMAES	No Action	MS User will notify Waiver Case Worker to Terminate Waiver Case before accepting Expedite Application.
Applicant suspended on an existing AMAES Case	Accept	AMAES will reject Expedite Application.
Applicant Deceased	Accept	Follow current policy to work Expedite application within AMAES.
Applicant has an existing Nursing Home Application on Active/Payee only case.	Accept	AMAES will accept Expedite Application.
Applicant has an existing Nursing Home Application on Denied/Deleted case.	Accept	AMAES will accept Expedite Application as pending.
Missing or illegible Required Application Forms.	Reject	Expedite will update Application status code to Incomplete. NH Sponsor will correct and resubmit application for review.

Searching For Applications Containing Trailing Documents

The search query for identifying applications that have been updated with trailing documents is **#trailing**. The District Office filter will allow you to select whether to perform a District-specific or State-wide search for applications with trailing documents.

1. Select the District Office filter you wish to apply.
2. Type **#trailing** in the search field.
3. Click the **Search** button.
4. Trailing documents will be denoted by a "New" stamp on the document.

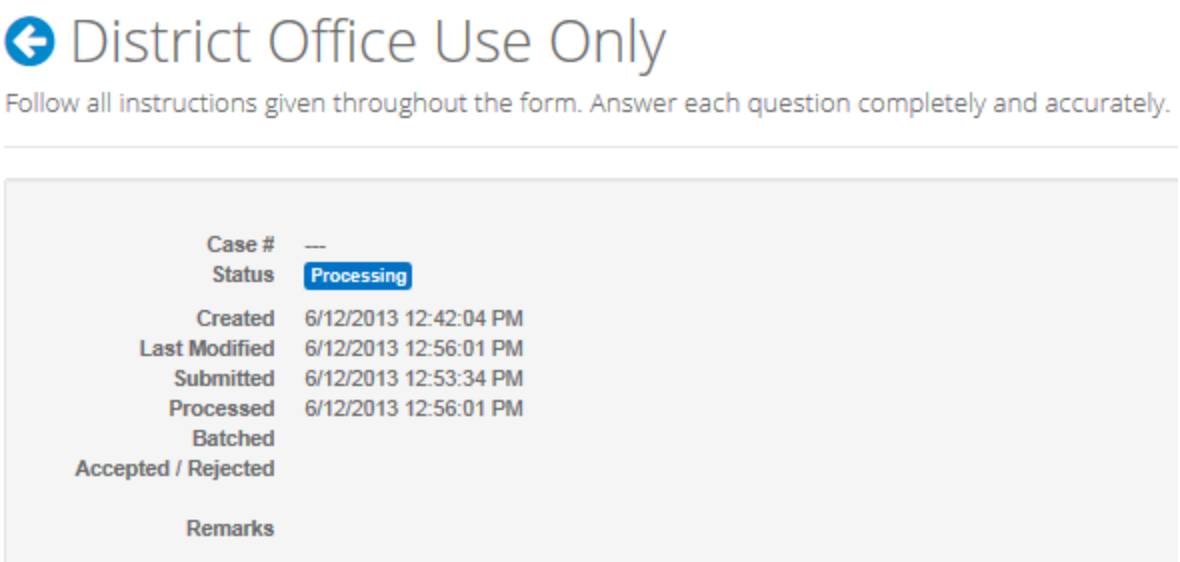


Note: Once a trailing document has been opened, it's trailing status is removed.

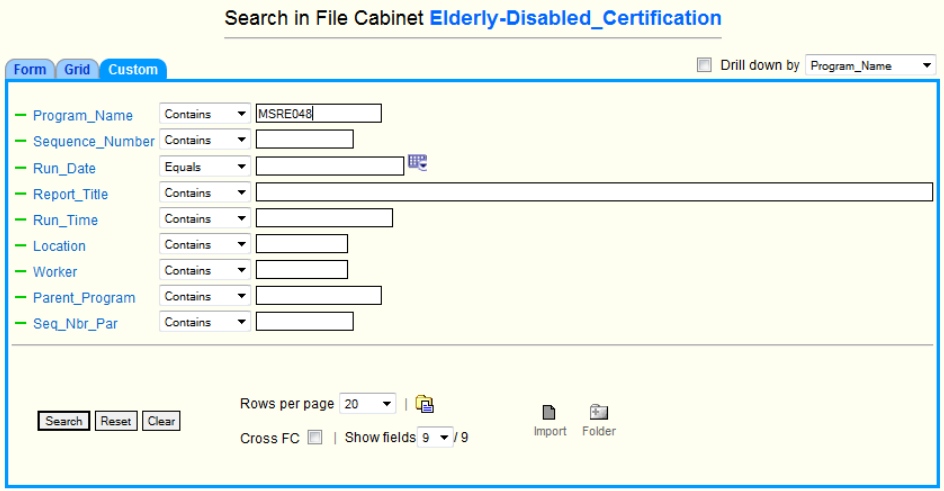
District Office Review Metadata

Once the Approve/Reject decision has been made on an application, an application activity page is available as the final page of the application in Expedite. The application activity page displays the current status as well as processing dates and times for the selected application.

1. Select an application in processing, accepted, or rejected status to view.
2. Select the **Attachment** page from the top menu.
3. Click the **Next Section** button. Next Section
4. The Application Activity Page appears.



COLD Report MSRE048-001



COLD Report MSRE048-001 is a daily report that lists the previous day's Accepted Expedite Applications and their import attempt status with AMAES.

Daily reports are listed by date and divided into DO/CSC Locations.

		Program_Name	Sequence_Number	Run_Date	Report_Title	Run_Time	Location	Worker
21		MSRE048T	001	06/24/2013	D.O. NURSING HOME WEB APPLICATION BATCH PROCESS REPORT	14:42:38	74	00
22		MSRE048T	001	06/24/2013	D.O. NURSING HOME WEB APPLICATION BATCH PROCESS REPORT	21:33:19	72	00
23		MSRE048T	001	06/24/2013	D.O. NURSING HOME WEB APPLICATION BATCH PROCESS REPORT	21:33:19	75	00
24		MSRE048T	001	06/24/2013	D.O. NURSING HOME WEB APPLICATION BATCH PROCESS REPORT	21:33:19	81	00

COLD Report MSRE048-001

The MSRE048-001 report lists the results of nightly batch exchange processes. The report should be used to identify cases that were transferred to AMAES for MS User assignment and eligibility determination as well as those that were rejected by AMAES due to their current AMAES status.

MSRE048T-001 ALABAMA MEDICAID AGENCY PAGE:

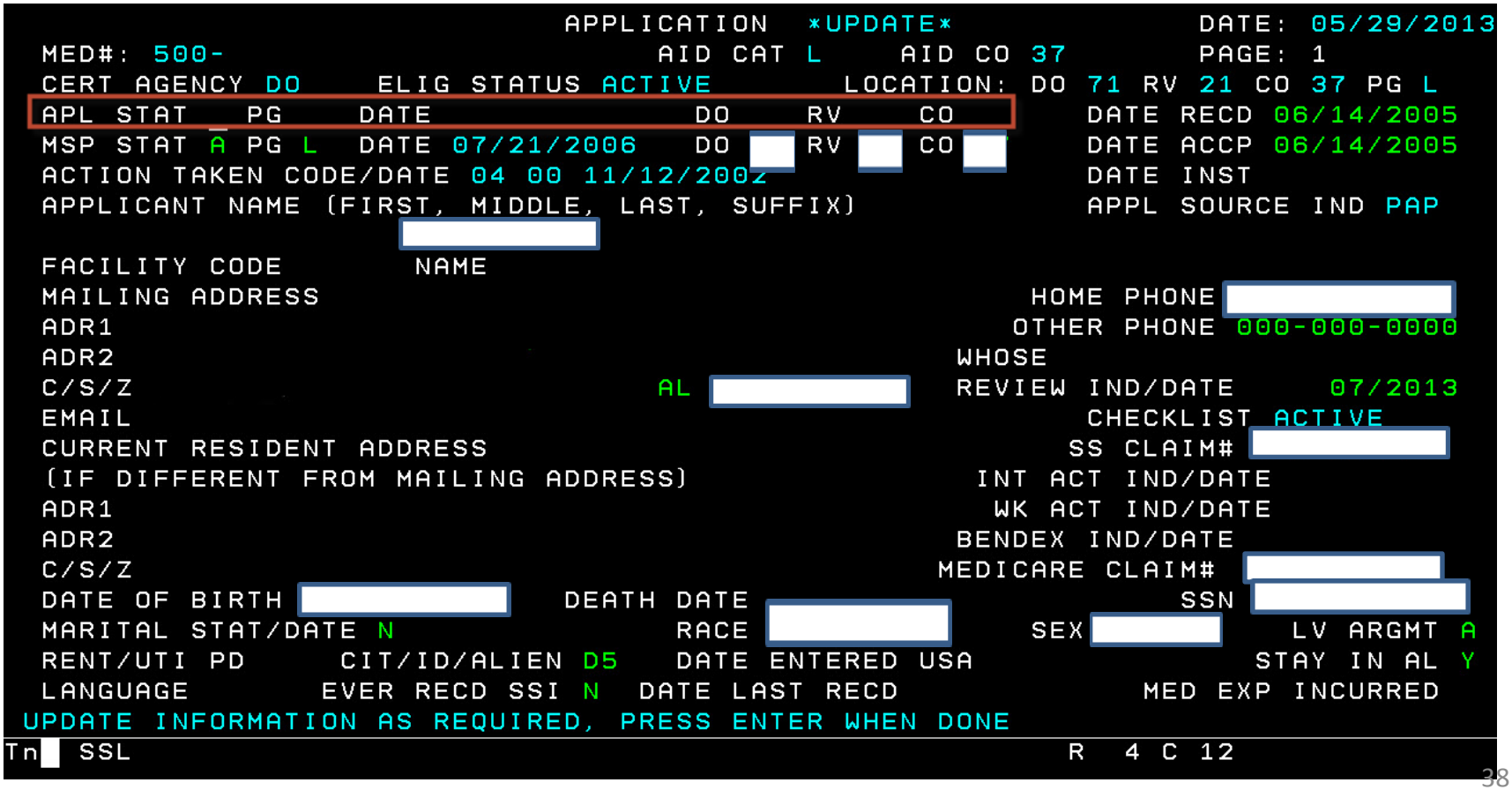
RUN DATE: 06/12/2013 D.O. NURSING HOME WEB APPLICATION BATCH PROCESS REPORT
RUN TIME: 12:36:01 ID:

DO#: 79

MED#/SSN	DO	RVR	NAME	APPL TYPE	MSG CD	MESSAGE	RECEIVED DATE
500- -4473	79	00	Taneisha N Ward	NEW	12	PENDING NH APPLICATION ADDED TO OLD CASE	20130611
500- -8024	79	00	Christophe Williams	NEW	12	PENDING NH APPLICATION ADDED TO OLD CASE	20130611
500- -4950	79	00	Beatrice E Avendano	NEW	12	PENDING NH APPLICATION ADDED TO OLD CASE	20130611
500- -0209	79	00	Betty I Omilian	REJ	03	APPLICANT HAS AN ACTIVE/PENDING DO APPLICATION	20130611
500- -9059	79	00	Harry M Hill	NEW	11	PENDING NH APPLICATION ADDED TO NEW CASE	20130609

Update AMAES

Once an application has been accepted into AMAES, an MS User will need to perform the **MSAPU** (Update) process to populate the Application Status DO (District Office), RV (Reviewer), and CO (County) fields with the appropriate assignee information.



Update AMAES Details

The following will need updated (MSAPU/MSMTU) by the MS user to ensure the record is correctly entered into AMAES:

MSMTU - Certain fields on the Expedite application do not update the AMAES core and vice versa (except at Award). If this is a new record to the AMAES, it will load without the Aid-CO, and the Location, Reviewer and County. This can be accomplished before or after MSAPU. If record already exists, these fields will be populated from the AMAES (Q1).

MSAPU - Page-1, Add Location, Reviewer and County (APL Location code); SS Claim (may have pseudo number listed), Medicare Claim (may or may not require changing), Citizenship (will come in as "P0").

Page-2 – Only one sponsor will come across from the web, so sponsor information will require updating. If there is an attorney and the legal authority option is taken on the web, the document is attached, but the attorney's data has to be manually entered from that document.

Page-3 – Spouse, If spouse is listed as divorced, separated, or death, you may want to replace the address line 1 with the word, Divorced, Separated, or Death so that it can show correctly, the county must be entered.

Page-4 – Must be updated as needed with income (gross and net), claim #, VA Indicator and other.

Page-5 thru 13 – As needed.

Printing AMAES Applications and Letters Received From Expedite

There is a new AMAES Transaction Code for printing Medicaid Applications received online through Expedite. AMAES records received through the Expedite System use the **MSAPW** Transaction Code to print the AMAES Application and Applicable Letters

MSAPW

Additional Notes:

1. Expedite Income Source – Enter Income Source(s) separately for each individual and source.
2. Expedite **Add** items are not editable once saved. If an error exists in an **Add** item, simply delete the item and re-enter it correctly.
3. Expedite will allow users to enter limitless Income Sources for the applicant, spouse, and other. AMAES however, limits Income Resources as follows:
   - Applicant – 6
   - Spouse – 6
   - Other – 2

Additional Notes: Expedite Income Source

Expedite Income Source(s) must be entered separately for each individual and source. For example, if both the applicant and their spouse received Unemployment, there would be two records of unemployment – one for each individual.

Applicant

Income Source

Type	Unemployment Compensation
Claim Number	060100007
Applicant Amount	370
Spouse Amount	
Other Amount	
Frequency	Weekly

Spouse

Income Source

Type	Unemployment Compensation
Claim Number	769285411
Applicant Amount	
Spouse Amount	250
Other Amount	
Frequency	Weekly

Income

Follow all instructions given throughout the form. Answer each question completely and accurately.

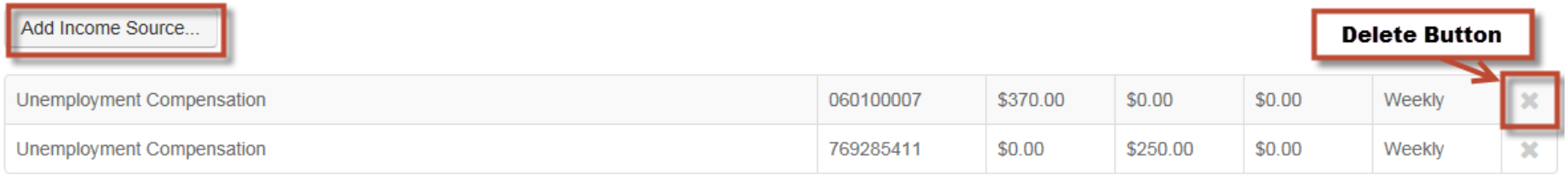
Gross Income: This means "money coming in" before anything is taken out. If you or your spouse have "money coming in" from any of the sources listed here, fill in the claim number and gross amount. NOTE: If you are applying on behalf of a child, each parent must also answer these questions. If you are applying on behalf of an adult, the spouse must also answer these questions.

Add Income Source...

Unemployment Compensation	Applicant	060100007	$370.00	$0.00	$0.00	Weekly	
Unemployment Compensation	Spouse	769285411	$0.00	$250.00	$0.00	Weekly	

Additional Notes: “Add” Data Not Editable

There are several areas of the application where users can “Add” additional information. Once a user has submitted the additional information, the item cannot be edited and must instead be deleted and resubmitted correctly.



Additional Notes: AMAES Income Source Limits

Expedite will allow users to enter limitless Income Sources for the applicant, spouse, and other. AMAES however, limits Income Resources as follows:

- Applicant – 6
- Spouse – 6
- Other – 2

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 P-N                          APPLICATION  *INQUIRY*            DATE: 06/25/2013
 MED#:                                                          PAGE: 4
 INCOME                                                                  VA
            TYPE   CLAIM NO.      SOURCE     GROSS AMOUNT   NET AMOUNT  IND
 APPLICANT: 01     48572des       SSA         25,000.00          .00
            03     584256ZX                      190.00          .00
            06     854PL1         FCS         25,000.00          .00
                                                    .00          .00
                                                    .00          .00
                                                    .00          .00
 SPOUSE:    01     48572          SSA         25,000.00          .00
            03     584256                        200.00          .00
            06     8541           FCS         25,622.00          .00
            16     85214                       50,000.00          .00
                                                    .00          .00
                                                    .00          .00
 OTHER:     01     48572          SSA         15,698.00          .00
            03     584256                        500.00          .00
 SPOUSAL IMPOVERISHMENT IND   (Y/I/R)        QIT-IND
 SPOUSAL AMOUNT                 .00          ELE-SRC       ELE-ACT
 NUMBER IN ALLOCATION
 FAMILY ALLOCATION              .00
 PROTECTED RESOURCES      (Y/N/P/C)
PRESS ENTER FOR NEXT PAGE, OR ENTER NEW TRAN CODE
Tn SSL                                                  R  1 C  5
```