



State of New Jersey
DEPARTMENT OF HUMAN SERVICES
DIVISION OF MEDICAL ASSISTANCE AND HEALTH SERVICES

ADMINISTRATIVE OFFICES
QUAKERBRIDGE PLAZA—BUILDING 7 & 5
QUAKERBRIDGE ROAD
TRENTON, NEW JERSEY 08619

ADDRESS REPLY TO:
CN-712
TRENTON, NEW JERSEY 08625

MEDICAID COMMUNICATION 86-3

TO: County Welfare Directors DATE: May 19, 1986

SUBJECT: Release of PAAD Income Information
for Medicaid Only (MAO) Applicants/Recipients

The Division of Medical Assistance and Health Services has adopted regulations which authorize the release of income information from the Pharmaceutical Assistance to the Aged and Disabled (PAAD) data files for adult Medicaid Only (MAO) applicants and/or recipients. This is part of the State's ongoing efforts to minimize case errors and expand exchanges of information between the programs.

The categorical requirements for the PAAD Program are similar to those for the Medicaid Only Program inasmuch as a PAAD applicant must be 65 years of age or older or receiving Social Security Disability benefits. While the PAAD needs test is limited to income, \$13,500 annually for an individual and \$16,250 annually for a couple, the income information entered into the recipient's file also includes interest income. For PAAD purposes that information is only critical as it relates to income, since there is no resource test under that program. However, for Medicaid purposes that information could indicate a liquid asset (bank account, certificate of deposit, life insurance, etc.) which must be considered in determining the individual's resource eligibility.

Accordingly, for individuals with a PAAD history, the County Welfare Agency can now obtain financial data which can be used as an indicator to assess the validity of information contained within the application or case record for MAO applicants/recipients. In order to minimize the administrative burden and to maximize the number of matches, since not all elderly and disabled individuals were PAAD recipients, it is suggested that the following groups of individuals be queried concerning PAAD eligibility at the time of intake or redetermination:

1. Each new MAO applicant, except the SSI to MAO referral.
2. Each active MAO case at the time of next redetermination, except as noted above.
3. Special cases where the agency feels that the information may assist in prudent case disposition.

For those individuals who respond affirmatively, the procedure outlined on page 2 has been established to access the PAAD files. This procedure is not intended to circumvent or replace the existing validation requirements for determining or redetermining eligibility. Since PAAD eligibility is based on anticipated income for the current calendar year, the totals provided can be used only as a gauge.

1. Complete and forward the AP-139 to the address indicated.
2. A computer listing of matched records (see sample attached), sorted in Social Security Number (SSN) order, will be returned by PAAD within two weeks of the date that requests are received.
3. The data elements contained on the report are as follows:

SSN.....Same as listed on the AP-139
NAME.....Same as listed on the AP-139
CITY.....Last address listed on the PAAD File
INCOME.....Anticipated annual income
SOC SEC.....Social Security payment
MED.....Medicare Part B Premium
PEN.....Pension
SAL.....Salary
UNEMP.....Unemployment compensation
INTDIV.....Interest/Dividends


NOTE: The tolerance indicator of a resource in excess of \$1,700 would be \$90, assuming a simple interest rate of 5.25%.

RENTAL.....Rental income
OTHER.....All categories not previously specified
APP INCOME.....Applicant's total income from all sources
COMB INCOME.....Combined income for a single couple
EFFECT DATE.....PAAD effective date

If upon reviewing the data, you identify sources of income which are not listed, or the existence of resource where no interest is indicated, or amounts which are significantly understated, we would appreciate your annotating the report and returning it to PAAD.

For your convenience, we have attached an initial supply of the Income Report for Beneficiaries of the Pharmaceutical Assistance to the Aged and Disabled Program, AP-139 form. Additional stock is available upon request from PAAD. Any questions regarding the information obtained from PAAD should be directed to Kathy Mason at (609) 292-9007.

Sincerely yours,


Thomas M. Russo, Director
Division of Medical Assistance
and Health Services

TMR:Pc

attachment

cc: Larry J. Lockhart
Deputy Commissioner

Audrey Harris, Director
Division of Public Welfare

Thomas Blatner, Director
DYFS Management Team

STATE OF NEW JERSEY
DIVISION OF MEDICAL ASSISTANCE AND HEALTH SERVICES
PHARMACEUTICAL ASSISTANCE TO THE AGED AND DISABLED

COUNTY WELFARE INCOME REPORT

10/01/85

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COUNTY: Atlantic

APPLICANT INCOME CLASSIFICATION

SSN	NAME	CITY	SOCSEC	MED	PEN	SAL	UNEMP	INTDIV	RENTAL	OTHER	APP INCOME	COMB INCOME	EFFECT DATE
100008554	Mary Gold	Atlantic	5911	0	0	0	0	4635	0	0	10546		080184
012013474	John Jones	Hammonton	6030	0	1173	0	0	1494	0	0	8697		060185
001014378	Margaret Smith	E. Vineland	4586	0	0	0	0	0	0	0	4586		060184
001010675	Philip Parker	Hammonton	6762	0	0	0	0	240	0	0	7002		031285
	Spouse		3018								3018	10020	

TOTAL REQUESTS FOR ATLANTIC COUNTY ARE: 4

SAMPLE