

.02 Adding a New Participant With Medical Expenses

A Medical Expense Deduction (MD) determination must be completed when the new participant being added to an active MA case meets both of the following:

- Is not eligible in any MA category other than MD.
- Has medical expenses in the month prior to the month of application or in the application month.

WARNING

An MD determination cannot be completed in AZTECS for a new participant in an active MA case. AZTECS cannot support two income and expense periods. The determination must be completed using a new AZTECS case number.

Complete the MD eligibility determination as follows:

Register a new case in AZTECS using the same PI. Key the reported change date as the date of application.

EXCEPTION

When the participant being added is not a mandatory MA participant, register the new participant as the PI. Do not include the participants from the original MA budgetary unit in the new case. Complete the MD determination process. (See [MD Determination Process](#))

- Include all mandatory [MD Family Budgetary Unit](#) participants from the original case in the new case.
- Return to the original case and key the add-on participant OU on SEPA for the add-on month.
- Reauthorize the original case up to the current system month for the original participants.
- Key the following on SEPA in the NEW CASE:
POS PARENT and POS SP field.
IN in the PT field for the MD participant.
IN for any mandatory budgetary unit participants who are ineligible in the original case.

OU in the PT field for the participants who are currently eligible in the original case.

- Complete the MD determination following policy and procedures in MD - Determination Process.

Place the following in both [case files\(g\)](#) for cross referencing:

- A copy of the most recent application. (The Assignment of Rights is valid for both cases.)
- A screen print of CAP1, CAP2, and CAP3.

When the new participant is eligible for MA in the MD category, authorize each month working forward to the current system month, keying any necessary changes in information.

Send notices, and set alerts on EWAL, as appropriate.

Continue processing using the following procedures as appropriate:

- When the MA budgetary unit in the original case remains eligible with the addition of the new participant (keyed as OU on SEPA), authorize the MA budgetary unit's eligibility through the current system month.
- When the MA budgetary unit in the original case is NOT eligible with the new participant (keyed as OU on SEPA), stop eligibility in the original case using the OC Denial or Closure Reason Code. Do not send a notice to the PI.

NOTE This must be completed after the roster date.

Add the mandatory budgetary unit participants to the new case by keying IN in the PT field on SEPA.

Authorize the current system month.

The mandatory MD family budgetary unit is eligible, through the remainder of the [protected eligibility period\(g\)](#) in the new case.

Document CADO with the closure of the original case and approval in the new case.

Place a screen print of CADO in the original case file for cross referencing.

WARNING

When a participant is involved in a case other than the one being worked, any changes made in that case affect all other cases in which the participant is registered. When changes are made to the participant's identifying information, AZTECS issues an alert for each caseload in which the participant is involved (other than the one being worked).