LDSS Course Catalog

Rev 5/2024

List of LDSS Trainings

Multi-Day Trainings

New LDSS Workers (7-Day Training)

Availability – Instructor-led & Virtual Course
Description:
LDSS Medicaid eligibility staff who have limited experience with a Medicaid caseload, and other staff as determined by the New York State Department of Health (NYS DOH). This seven-day training session provides participants with an introduction to New York State's Medicaid program, with a focus on the eligibility for individuals who need community-based medical care.
As a result of the training, participants will be able to:

- Identify the various public health insurance programs available to New York State residents.
- Separate applying household members into distinct categories
- Recognize the different levels of eligibility within the Community Medicaid program.
- Interpret and apply community Medicaid eligibility policy and budgeting methodology.
- Summarize applicant's eligibility decisions based on information submitted and budgeting results.

LDSS Chronic Care Workers (4-Day Training)

Availability – Instructor-led & Virtual Course
Description:
LDSS Medicaid eligibility staff persons that have minimum experience with a Chronic Care caseload, and other staff as determined by the New York State Department of Health (NYS DOH).
This is a four-day training session focusing on determining eligibility for institutionalized individuals and individuals who receive services from home and community-based programs.
As a result of the training, participants will be able to:

- Explain the handling of different sources of income
- Describe the processes related to excess resources and Medicaid eligibility
- Define key issues related to spouses
- Explain the procedures related to transfers of assets
- Explain the handling of different types of resources

LDSS Advanced Chronic Care Workers (4-Day Training)

Availability – Instructor-led & Virtual Course
Description:
This is a four-day training, focusing on determination of eligibility for institutionalized individuals and individuals receiving services from MLTC. Participants will review 5 case studies comprised of applications, Supplement A as well as all supporting documents.
This is an advanced class; participants are required to have a minimum of twelve months experience actively working on chronic care cases.
As a result of the training, participants will be able to:

- Review MAGI as it relates to nursing home applicants
- Evaluate types and values of resources and income
- Identify transfers and the effect on applications/recipient
- Complete budgeting processes for single institutional and spousal A/R's
- Determining coding for principal provider and eMedNY

Full Day Trainings

Documentation Requirements (1-day training)

Availability – Virtual Course
Description:
This full-day program reviews the documentation requirements for New York State Medical Assistance Programs. Factors of eligibility that must be documented and those that do not need to be documented are discussed. In addition, Citizenship/Identity policies regarding primary documents and other acceptable levels of documentation are explored. A discussion regarding the Renewal Simplification and Financial Maintenance policies is also included.
As a result of the training, participants will be able to:

- Understand the documentation policy for Medicaid applicants and recipients who apply through LDSS
- Differentiate the facts of eligibility that must be verified vs. those that do not require verification
- Understand the citizenship and identity verification requirements
- Identify which documents are acceptable forms of verification
- Recognize applications and/ or renewals which will require clarification of financial requirements

Excess Income (1-day training)

Availability – Virtual Course
Description:
This full-day program covers the basic principles of the Excess Income policy and its application. It will review the impact of the six-month accounting period and provide a number of examples illustrating the application of Excess Income policy. The Pay-In Subsystem and the Principal Provider Subsystem will also be briefly discussed.
As a result of the training, participants will be able to:

- Review the Medicaid Excess Income Program policy
- Explanation of who is eligible to participate with the Excess Income program
- How the excess income amount is determined
- Distinguish the types of Medicaid coverage to be authorized
- Factors which affect applicability of bills
- Explanation of the Medicaid Pay-In Program
- Distinguish the functions of the WMS Pay In and Principal Provider Sub Systems

Immigration Eligibility (1-day training)

Availability – Virtual Course
Description:
This full-day program will review Immigration categories including the Qualified and Permanently Residing Under Color of Law (PRUCOL) immigration status. The session will also assist workers in determining the documentation that supports each immigration status. Emergency Medicaid coverage will also be addressed.
As a result of the training, participants will be able to:

- Interpret immigrant eligibility guidelines for government funded health insurance programs
- Identify the different immigration statuses
- Recognize immigrants' concerns
- Review acceptable forms of documentation
- Understand WMS coding for each immigrant category

Medicare Savings Program (1-day training)

Availability – Virtual Course

Description:

This full-day program covers eligibility for Qualified Medicare Beneficiaries (QMB) and Qualifying Individuals (QI). A brief review of the Qualified Disabled and Working Individuals (QDWI) Category will also be included. The eMedNY system and the entries required by this program will also be addressed in the presentation.

As a result of the training, participants will be able to:

- Understand the different parts of Medicare coverage available and the coverage provided
- Determine who is eligible for the Medicare Savings
- Understand the benefits available with each MSP category
- Review and make entries into the eMedNY system

Resource Analysis (1-day training)

Availability – Virtual Course

Description:

This full-day program reviews resources most commonly found in Chronic Care cases, including stocks, bonds, and brokerage accounts. A method for tracking assets moved from one investment instrument to another (selling stock in one brokerage account, moving the resulting funds to a bank account or re- investing the money into other stocks or bonds) will be reviewed for use in identifying transfers during the look-back period. Treatment of Retirement Funds and Annuities as an income or a resource is covered as well as Income Producing Property. Life Insurance, Burial Funds and Irrevocable Pre-Need Funeral Agreements will also be reviewed.

As a result of the training, participants will be able to:

- Interpret SSI-Related policies related to proper sequence to be used in the assessment of burial funds and space items as resources
- Determine the value of an annuity
- Distinguish between the treatment of an annuity with transactions before and after DRA legislation
- Track and assess a variety of resources for possible transfer
- Evaluate types and values of resources, including life insurance, burial funds, stocks, bonds, and mutual funds

Retirement Income and Annuities (1-day training)

Availability – Virtual Course

Description:

This full-day program will review the types of tax-qualified funds (including pensions, supplemental retirement funds and individual retirement accounts) that may be owned by clients applying for Medicaid benefits. The Medicaid policy on these holdings will be discussed including Spousal Impoverishment situations. This program will also review the basic annuity terms, the types and uses of annuities, Medicaid policy on annuities, and transfer implications.

As a result of the training, participants will be able to:

- Determine the value of a Retirement fund
- Determine the value of Annuity
- Distinguish between the treatment of an Annuity with transactions before and after DRA legislation

Self-Employment (1-day training)
Availability – Virtual Course
Description:
This full-day program addresses the treatment of income and resources associated with various self- employment situations, including sole proprietorships, partnerships, S corporations and rental property. The program includes a discussion on income tax schedules associated with the various self- employment situations, allowable income and resource disregards and exemptions for MAGI-Like, SSI-Related, and ADC-Related categories
As a result of the training, participants will be able to:
- Identify deductions allowed by IRS to arrive at net profit
- List steps necessary to determine net income when a business is new or when tax returns are not filed
- Understand the Self-Employment worksheet to be used by applicants/recipients (A/Rs) to calculate their monthly business income
- Complete the 6%-rate-of-return test
- Identify IRS forms and schedules used to calculate Sole Proprietorship, partnership and “S” corporation profits/losses

Spousal Impoverishment (1-day training)
Availability – Virtual Course
Description:
This full-day program reviews the budgeting methodology for Spousal Impoverishment cases. The program includes completion of the Spousal Budgeting forms including the calculation of the Community Spouse Resource Allowance (CSRA), countable resources, Monthly Maintenance Needs Allowance (MMNA), Family Member Needs allowance, and Net Available Monthly Income (NAMI) for the Institutionalized Spouse. Increasing the CSRA to meet a shortfall in MMNA is also discussed.
As a result of the training, participants will be able to:
- Explain the spousal impoverishment budgeting process
- Complete processes related to institutionalized and community spousal budgeting
- Explain the budget options for individuals participating in a HCBS Waiver Program

SSI-Related Budgeting (Income) (1-day training)
Availability – Virtual Course
Description:
This full-day program reviews deeming and allocation, Spouse-to-Spouse deeming (i.e. eligibility for Supplemental Security Incomes (SSI)-Related adults) and Parent-to-Child deeming (i.e. eligibility for SSI-Related children). The focus will be on the income budgeting and manual Medicaid Eligibility Budgeting Logic (MBL) budgets also will be used in the review. A brief review of the Medicaid Buy-In Program for Working People with Disabilities (MBI-WPD) will also be included.
As a result of the training, participants will be able to:
- Identify allowable income exemptions and disregards for persons eligible for SSI- related Community budgeting
- Understand the household size policy for SSI-Related Community budgeting
- Describe the Allocation and Deeming Process of the SSI-Related Budgeting Process
- Identify the appropriate MABEL codes needed for an SSI-Related Community Budget
- Demonstrate how MABEL calculates income eligibility for SSI-Related Community Budgets

Transfer of Assets (1-day training)

Availability – Virtual Course

Description:

This full-day program covers the basic Transfer policy: the look-back period, what constitutes a transfer, allowable transfers, Undue Hardship provisions, and resources vs. stream of income, determination of the Uncompensated Value (UV), calculation of the penalty period, and the implementation and impact of transfer penalty. Also included are the new rules and regulations enacted in 2006 from the Federal Deficit Reduction Act of 2005, including Promissory Notes and Life Estates.

As a result of the training, participants will be able to:

- Explain the procedures related to transfers of assets for applicants/recipients
- Distinguish between the treatment of an annuity with transactions before and after DRA legislation as they relate to transfer policies
- Explain the effects of Life Estate on transfer

Trusts (1-day training)

Availability – Virtual Course

Description:

This full-day program reviews the types of trusts most often encountered in Medicaid caseloads. Definition of common trust terms, the role of trustee and his/her discretion, treatment of trusts where the Applicant/Recipient (A/R) is grantor and/or beneficiary, Medicaid Qualifying trusts, Omnibus Budget Reconciliation Act (OBRA) '93 trusts, and Exception and Supplemental Needs Trusts will be discussed.

As a result of the training, participants will be able to:

- Identifying types of Trusts funds
- Distinguish the difference between MQT’s and OBRA 93 Trusts
- Distinguish the difference between Revocable and Irrevocable Trusts
- Distinguish the difference between individual Exception Trusts and Pooled Exception Trusts
- Determine countable income/resources of Trusts

Half Day Trainings

Medicaid Continuations for SSI (½-day training)

Availability – Virtual Course

Description:

This half-day program will cover Medicaid Continuations that are triggered by the loss of eligibility for Supplemental Security Income (SSI). These situations include Pickle, Disabled Adult Child (DAC), 1619(a) & (b), and Widow/Widower cases.

As a result of the training, participants will be able to:

- Understand Auto SDX process
- Distinguish the different MA Continuation programs specific to SSI individuals
- Identify the fields on the SDX to determine appropriate MA Continuation program eligibility

Real Property (½-day training)
Availability – Virtual Course
Description:
This half-day program will review a variety of issues related to homesteads and other non-income producing real property. Included will be the definition of a homestead, Medicaid policy on mortgages held by Applicant/Recipients (A/Rs), life estate issues, reverse mortgages and liens on homesteads and non-income producing real property. As a result of the training, participants will be able to:

- Interpret the interaction of home-based assets on eligibility
- Explain when a homestead is exempt
- Discuss life estates, mortgages and promissory notes.

Resource Attestation (½-day training)
Availability – Virtual Course
Description:
This half-day program reviews the Medicaid benefit package available for different levels of resource documentation. A discussion of appropriate application and the Welfare Management System (WMS) coding required for each benefit package will also be included.
As a result of the training, participants will be able to:

- Indicate which applicant/recipients are subject to a Resource Test.
- Distinguish the difference between the three different resource verification options. Attestation, documentation of current resources, and full resource review.
- Understand the various Medicaid Coverage Choices for SSI-R applicant/recipients.
- Explain how to authorize Medicaid Coverage in WMS based on the coverage choice and type of resource verification received.
- Demonstrate the appropriate process for an SSI-R recipient who has a change in need.