

## Proposed ICAMA Forms 7.01, 7.02 and 7.03

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**Presenters:**

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This is the first of two webinars that will offered to states.

The next webinar will be held February 23, 2012 at 2 Eastern.

If you did not receive an invitation to this webinar please contact Ursula Gilmore to add your name and e-mail to the guest list.

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## Administrative changes are happening everywhere.....



**'The more that we can save on the administrative side of the budget, the more that we will have to invest in significant programs ...'**

—Mary Soderberg, Pennsylvania Secretary of the Budget

This is a fitting quotation as the proposed changes to ICAMA forms will allow states to increase administrative efficiency. By spending fewer dollars on administration states have more resources for programs that benefit children and their families.

## Issue: ICAMA forms do not meet compact mandates



- Medicaid provision to AA-eligible children delayed/interrupted
- New title IV-E category under Fostering Connections—GAP\*
- Some information requested no longer required

\*section 471(a)(28) of SSA Guardianship Assistance Program

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### Reasons for the Forms Changes (Note: ICAMA Forms – not changed since 1997)

The Compact, ICAMA, which is state law in all signatory states, mandates ‘...the establishment and maintenance of suitable substantive guarantees and workable procedures for interstate cooperation...’ (Article I).

AAICAMA, the association, has the responsibility to ensure that Compact mandates for timely, seamless Medicaid receipt interstate are met.

ICAMA members have indicated that current forms (ICAMA 6.01, 6.02, and 6.03) no longer meet the standards set by the ICAMA. Staff see regular delays in the provision of Medicaid due to administrative errors, altered and/or confusing forms.

Revised forms will:

- require less staff time to complete saving time and money; reduce redundancy
- help assure positive outcomes children and families via uninterrupted Medicaid provision
- ultimately be completed on-line via a secure server

On-line forms would:

- allow collection of state specific interstate data to help state budget planning
- allow interstate data to be presented in the aggregate to help the federal government establish effective interstate policies
- allow states to exchange forms on a common server

Revised forms will comply with new federal legislation, Fostering Connections (FC). FC created a new IV-E category, the Guardianship Assistance Program (GAP) that allows states to claim open-ended reimbursement under title IV-E for kinship guardianship assistance provided on behalf of eligible children who leave foster care for placement in a legal guardianship with a relative. (Section 471(a)(28) of SSA)

Law ensures categorical Medicaid eligibility for children receiving GAP payments (SSA Sect.473(b)(3)(C)) and:

- Provides no administrative vehicle or guidance on how these cases are to be handled interstate
- Phases out (by 2018) the link to AFDC as part of determining eligibility for federal AA, thereby increasing numbers of AA eligible children and by extension, interstate placements
- Encourages states to provide adoption and GAP assistance past age 18

**Note: Training on new forms for states will be offered upon request and at the AAICAMA annual meeting**

## Solution: 700 Series ICAMA forms



Proposed 700 series ICAMA forms —

- designed by state professionals
- meet new federal mandates
- state human service agency needs emphasized

The changes to the ICAMA 600 series forms fall into three categories:

- Substantive
- Formatting
- Inclusion of GAP cases

During this call we will discuss the changes proposed by ICAMA members

States are encouraged to provide comments at the end of the call or to comment by e-mail using the Comment forms available at <http://www.aaicama.org>

States may comment any time before the end of the Review and Comment period on February 24, 2012

## Benefits of ICAMA 700 series Forms



- Improve interstate practice
- Save state dollars
- Improve outcomes
- Improve data collection
- Provide complete and important information to adoptive parents

### Changes to Forms will

- ✓ Improve practice via shorter, clearer forms , removal of unnecessary information, and inclusion of title IV-E GAP (Guardianship Assistance Program) cases
- ✓ Save state dollars with improved administrative efficiency in interstate case processing
- ✓ Improve outcomes for children and families by reducing delays in Medicaid receipt; establishing uniform processes for interstate GAP cases; and supporting permanency
- ✓ Will help adoptive parents navigate the interstate process and understand what medical benefits their children will receive in the new state
- ✓ Will ultimately utilize available technology (requiring on-line completion of the forms) to further streamline interstate process and allow collection of data on interstate adoption-assistance and GAP cases.



## Outline of changes

Administration of the ICAMA uses 3 standard forms to help ensure seamless provision of services to children living outside the Adoption Assistance (AA) state.

Proposed changes:

- 6.01 to 7.01
- 6.02 to 7.02
- 6.03 to 7.03

To access the forms currently in use, and the proposed 700 series forms, please go to AAICAMA's web site at:

<http://www.aaicama.org>

## Summary of Changes




What follows is a detailed summary  
of proposed changes to  
ICAMA 6.01, 6.02, and 6.03  
as proposed by state ICAMA professionals.

### **Statutory Imperative**

- ✓ ICAMA was enabled by your state and is now state law.
- ✓ Under the ICAMA, standard forms and procedures developed with the goal of eliminating delays in the provision of post adoption services to eligible children who are placed in or move to a state that is not a signatory to their AA Agreement (AAA).

### **Redesign Process**

- ✓ State representatives participated in a re-design of the current forms (6.01, 6.02, and 6.03) over a six-month period in 2011.
- ✓ The redesigned forms (7.01, 7.02, and 7.03) were submitted to the Executive Committee of AAICAMA and were approved for submission to the entire membership for Review and Comment.



## ICAMA 6.01

State ICAMA administrators in the Adoption Assistance (AA ) state use this form to:

- Notify a new resident state that a child with an AAA\* is moving to their state
- To provide AA eligibility information about the child to new state
- To certify that this eligibility meets federal requirements

**Only the state that determined the child's AA eligibility and signed the Adoption Assistance Agreement uses this form**

\*AAA - Adoption Assistance Agreement

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To access the ICAMA 6.01 and the proposed 7.01 go to AAICAMA's web site at:  
<http://www.aaicama.org>

This form is used by the ICAMA administrator in the AA state whenever an AA or GAP eligible child moves to a new resident state. This includes when a child is placed in a treatment facility in a new state. (i.e.; a state where adoptive parents/guardians do not reside.)

The new state receives certification of the child's eligibility status only from the AA/GAP state.

The current resident state will receive notification that the child's Medicaid case in that state can be closed.

**Note:** Once the AA state determines the child's eligibility for adoption assistance (i.e. IV-E or state-funded) or GAP, the resident state can not re-determine the child's eligibility. Once determined eligible for AA or GAP, the child remains eligible in the resident state.

## Changes from ICAMA 6.01 to 7.01 1 of 6




6.01 to 7.01

### Line 1 (added) – ‘Date Requested for Medicaid Opening’

Reason: Allows ICAMA staff to triage incoming forms quickly .

### Date Requested for Medicaid Opening

- ✓ This date allows ICAMA administrators to triage incoming forms immediately and easily upon receipt of the form.



## Changes from ICAMA 6.01 to 7.01 2 of 6

**6.01 to 7.01**

### Section A

Consolidates **ALL** information on child(ren) including basis of eligibility for Medicaid

Reason: Groups ALL child-identifying info in one place

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The ICAMA 6.01 had child specific info in several Sections of form.

✓ All this information is in one place at the beginning in 7.01

ICAMA 7.01 – Continues to allow for multiple children

✓ More than 3 children can be submitted on the new form

✓ Only the number of children covered by the form will appear (i.e.; if only one child is covered by the form then a section for only that child will appear. If several children are covered by the form then sections for that number of children will appear)

This saves storage space, whether electronic or paper.

## Changes from ICAMA 6.01 to 7.01 3 of 6



6.01 to 7.01

### Section A.2 Adoptive Parent Information

Added '*Guardian*' to heading – Adoptive parent(s)/Guardian(s)

**Reason:** Include GAP cases

Deleted Race & Ethnicity information on adoptive parents


**Reason:** Unnecessary

Reason:

- ✓ Includes FC's GAP provisions
  - ✓ Eliminates information that is often not available to the ICAMA administrator
- Sates indicate that this section is often left blank on the 6.01 form

6.01 to 7.01

## Changes from ICAMA 6.01 to 7.01 4 of 6



Address Information

**Section A.3**

Changes 'Current family address' to:  
'Address in current or new residence state'

**Section A.4**

Changes 'Previous Address ' to:  
'Previous Address (if applicable)'


**Reason:** Clarifies original wording

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### Reason

- ✓ Wording changes made to clarify address information. Many ICAMA staff found original language confusing.
- ✓ The intent of the section is to provide information on where the family can be contacted.



## Changes from ICAMA 6.01 to 7.01 5 of 6

Important changes relative to GAP:

- **Section A** (Child Information) - Box has been added to include eligibility for title IV-E GAP
- **Section A.2** All references to 'Parent(s)' now also include 'Guardian(s)'
- **Section E** Certification section includes certification of eligibility for title IV-E GAP

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6.01 to 7.01

As noted earlier, under Fostering Connections ' GAP provisions, a Title IV-E agency :

✓ may claim open-ended reimbursement under title IV-E for kinship guardianship assistance provided on behalf of eligible children who leave foster care for placement in a legal guardianship with a relative

✓ may **also** make GAP payments pursuant to a kinship guardianship agreement on behalf of **each sibling** of an eligible child who is placed with the same relative under the same kinship guardianship arrangement.

Sibling(s) are not required to meet eligibility criteria at 473(d)(3)(A) to receive GAP payments.

State has the discretion to reasonably define sibling for the purposes of GAP (e.g, siblings related by biological, marital or legal ties, step-siblings, half-siblings and adoptive siblings, etc)

**Important:** Children who receive kinship guardianship assistance payments are categorically eligible for Medicaid pursuant to section 473(b)(3)(C) in the State where such child resides. This includes youth up to age 21 per section 475(8)(B). Such a youth is eligible for Medicaid **whether or not the new resident state has elected the IV-E GAP program or elected to provide GAP past age 18.** (ACYF-CB-PI-10-11)

**Note:** Most ICAMA member states already use ICAMA forms to process GAP cases. This addition to ICAMA forms benefits both states (i.e., do not need to develop GAP transfer procedures and forms) and children eligible for GAP.

## Information deleted from 6.01 6 of 6



6.01 to 7.01


- Race and ethnicity of adoptive parents (Section A.2)
- Date of Medicaid closure (Section B)
- State policy on provision of Medicaid to children with state-funded AA – AA state’s policy on Cobra-reciprocity (Section B)  
Reason: Unnecessary for administration of the ICAMA
- Parent private insurance information – i.e., other medical coverage. (Section C)  
Reason: Beyond the scope/purview of ICAMA

Note regarding Private Insurance:

Whether a family chooses to place their child on their private insurance is at parent option.

To include any language referencing private insurance on the ICAMA forms may imply that parents must provide it this information. A family may provide the information at their option, but are not required to do so.

A child eligible for title IV-E adoption assistance, is “mandatory categorically needy”. The availability of Private Insurance has no impact on this eligibility or the state’s responsibility to provide its’ Medicaid services.



**ICAMA 6.02**

The purpose of this form is to notify the family that their new state has been provided with all information needed to open a Medicaid case.

Only the state that signed the Adoption Assistance Agreement uses this form.

**ICAMA 6.02**

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This form is important as it is a state’s way to indicate to families that their ICAMA professional has provided the new resident state with all necessary information.

It is direct contact appreciated by families.

The information provided on page 2 (or 7.02b) is also important and may help to eliminate many of the calls ICAMA administrators receive while allowing families to more fully understand their responsibilities when relocating to a new state.

## Changes from ICAMA 6.02 to 7.02 1 of 4



6.02 to 7.02

The 6.02 form is replaced by a Cover letter to Parents  
to be accompanied by 'Tips for Families'

Reasons for the change from a form to a form letter:

1. The purpose of the form is to inform parents of actions that have been taken on their behalf. The 6.02 seems to obscure this fact and has proven difficult for parents to understand. The primary point of misunderstanding is that receipt of the form requires no action on their part. This fact is directly stated at the beginning of the letter.
2. The 6.02 form required the ICAMA Administrator to complete information that is more efficiently provided in a cover letter.
  - ✓ ICAMA Administrator's address can be on the state agency letterhead and therefore does not have to be filled in.
  - ✓ The family's current address will be in the addressee block of the letter.
  - ✓ The child's eligibility status is given with key information vis-à-vis Medicaid.
  - ✓ The language in paragraph 1 includes title IV-E /guardianship

## Changes from ICAMA 6.02 to 7.02 2 of 4



6.02 to 7.02

The 6.02 has been replaced by a **Cover letter** (7.02a) to Parents

Letter informs parents that the ICAMA 7.01 was sent to new state and contains:

- Basis for the child's eligibility for Medicaid  
(i.e., title IV-E AA, GAP or state-funded AA)

**and**

- Implications of the move on child's receipt of Medicaid

Benefits of letter include :

- ✓ Clearer instructions and information for family compiled in one place.
- ✓ Saves state time and money in staff time eliminating calls and/or e-mails from the family to administrator
- ✓ child's eligibility status ( IV-e or state-funded) is communicated directly/clearly to adoptive parents with key information vis-à-vis Medicaid.

## Changes from ICAMA 6.02 to 7.02 3 of 4



6.02 to 7.02

Letter also informs parents that :

- No action is needed upon 7.02 receipt
- Child is either title IV-E or state-funded AA eligible and what this means for receipt of Medicaid in new state
- Some states do not extend COBRA-reciprocity to state-funded AA children
- They should contact the sending ICAMA office if they don't receive a Medicaid card/case number from the new state within 30 business days

Rationale:

- ✓ Interstate placements are confusing to adoptive parents. All this information has been requested of ICAMA administrators by families many times.

## ICAMA 7.02b 4 of 4



6.02 to 7.02

### 7.02b Provides parents with useful information

#### Examples:

- Notify your worker as soon as you know you'll be moving
- Have a copy of child's AA or GAP agreement
- Know if your child is title IV-E or state-funded AA eligible
- What to do if your child needs emergency medical care before a Medicaid card is issued
- Medicaid services are different in each state
- What to do if you move to a non-COBRA reciprocity state
- See AAICAMA website for additional information

### Benefits of 7.02b Useful Information for Families:

- ✓ Information provided in 7.02b is direct and is not complied elsewhere

## ICAMA 6.03



ICAMA 6.03

Purpose: ICAMA 6.03 allows communication and exchange of information between the Adoption Assistance state and the residence state.

**BOTH the Adoption Assistance state and the residence state use this form.**

To access the ICAMA 6.03 and proposed 7.03 go to AAICAMA's web site at:  
<http://www.aaicama.org>

## Changes from ICAMA 6.03 to 7.03 1 of 6



6.03 to 7.03

Line 1 adds:

'Reason for reporting'

- Open or close Medicaid
- Change of address
- Extend Medicaid past age 18
- Termination of AA or change in adoption or guardianship status

### Section A:

#### (1) Reason for Reporting (line 1)

This changes allow ICAMA administrators to triage incoming forms quickly by category of request.

Section A also adds section with child's name, DOB, SSN, and basis of Medicaid eligibility for several children

## Changes from ICAMA 6.03 to 7.03 2 of 6



6.03 to 7.03

Line 2 adds:


'Effective date for all changes requested'

Reason: Immediately informs recipient state of what is needed and allows ICAMA staff to triage incoming forms quickly.

Clearly indicating the effective date of all changes requested in the form allows ICAMA administrators to effectively address the changes in the time needed by the requesting ICAMA administrator.

**6.03 to 7.03**

## Changes from ICAMA 6.03 to 7.03 3 of 6



**Section B Streamlines:**

- Consolidates
- All information on child(ren)
- Adoptive parent/guardian information

**Section C Streamlines:**

- 'Medicaid case Opened/Closed'
- 'Reason for Closure'

**Reason:** Streamlines and simplifies form

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Consolidating all the child's information in one area makes referencing state databases, in order to process or complete the form, simpler.

Indicating Medicaid case opening or closing, while requesting only reason for closure expedites the completion of the form as the effective date of this action is on line 2 and may include several actions.

6.03 to 7.03

## 7.03 Changes from ICAMA 6.03 to 7.03 4 of 6

### New Section



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**New Section D** adds:

‘Medicaid Extension Beyond Age 18’

*Request* from AA state

*Response* from residence state

Reason:

Incorporates new Children’s Bureau Policy Instruction\* on extension of AA past age18

\* ACYF-CB-PI-10-01

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**Section D: *Extension of Federal Assistance Beyond Age 18***

Added in response to Fostering Connections’ provisions (Sect 475(8)(B)(iv) of SSA) and Children’s Bureau **ACYF-CB-PI-10-01**.

Fostering Connections:

✓ reiterates conforming amendment to section 473(a)(4) of the Act stating that a title IV-E agency can continue title IV-E AA and IV-E GAP payments to youth between the ages of 18 and 21, if agency determines that the “child has a mental or physical disability that warrants continuation of assistance”

✓ also permits states to extend federal (title IV-E) assistance to an eligible child after age 18 *if the child left foster care for federal adoption or GAP after reaching his or her 16th birthday, provided the child has not yet reached his/her 21st birthday and is:*

- o enrolled in school OR
- o employed at least 80 hours/month OR
- o in another activity designed to promote, or remove barriers to employment OR
- o is incapable of participating in any of those activities because of a documented medical condition

*“Such youth is eligible for Medicaid whether or not the title IV-E agency in the state of residence has taken the option to provide extended assistance per Sec, 475(8)(B) of the Act.”*

✓ also phases in (based on age, length of stay in care and sibling group membership) *elimination of all income, resource tests associated with eligibility for federal Title IV-E AA under Aid to Families with Dependent Children (AFDC).*

## Changes from ICAMA 6.03 to 7.03 5 of 6



6.03 to 7.03

### Section F Simplified

Indicates change in Adoption/Guardianship status


- final decree
- dissolution
- termination

**Reason:** Incorporates GAP, eliminates unnecessary information

Indicating a change in case status expedites the completion of the form as the effective date of this action is on line 2 and may include several actions.

6.03 to 7.03

## Changes from ICAMA 6.03 to 7.03 6 of 6



Important changes relative to GAP

- In the eligibility section of the child's information, a box has been added to include eligibility for title IV-E GAP
- All references to 'Parent(s)' now include 'Guardian(s)'

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Most ICAMA member states already use ICAMA forms to process GAP cases. This addition to ICAMA forms benefits both states (i.e., do not need to develop GAP transfer procedures and forms) and children eligible for GAP.

## Discussion:

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### QUESTIONS

About any of the proposed changes to forms?

Questions, comments and responses will be posted on the AAICAMA website (<http://www.aaicama.org>) and will be sent to states.

## Discussion:

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CONCERNS, ISSUES  
Regarding the revisions

Questions, comments and responses will be posted on the AAICAMA website (<http://www.aaicama.org>) and will be sent to states.



## Important Dates February 2012

- **February 9**  
Responses to all Review and Comments sent to states
- **February 23**  
Teleconference on proposed changes to ICAMA forms 6.01, 6.02, and 6.03 and responses to all submitted reviews and comments received to date
- **February 24**  
FINAL date for Review and Comment submissions
- **February 27**  
Voting begins on proposed changes



## Important Dates March and April 2012

- **March 6**  
Voting closes
  
- **March 21**  
Final results mailed to ICAMA Compact and Deputy Compact Administrators and other stakeholders
  
- **April 18**  
Tentative Implementation date for approved changes



## What AAICAMA needs from you:

- Consider changes proposed
- Provide comments on specific concerns
- Vote when it's time
- Support staff with new forms through training opportunities

Please advise AAICAMA if you need any state specific help during this process. The forms committee and Secretariat staff are ready to assist states.

## Comment Process 1 of 2



- States can comment any time during Review/Comment Process
- Closing date for Review and Comment is February 24, 2012
- To comment, go to: <http://aaicama.org> and click on 'Review and Comment-New Forms' to access the appropriate form or forms

The forms for Review and Comment are:

- General Comments
  - Comment on the proposed changes to the 6.01
  - Comment on the proposed changes to the 6.02
  - Comment on the proposed changes to the 6.03

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States are encouraged to comment. State review and comments are vital to the form redesign process.

The forms committee put much thought into the proposed changes indicated in previous slides and are anxious for state input.

Participants may share this presentation with other interested agencies in their states. Comment and questions may be submitted by any state agency.

Closing date for the Review and Comment process is February 24.

Please contact Ursula Gilmore if you have any questions about this process.

Phone: 202.682.0100 x269

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## Comment Process 1 of 2



- All comments will be addressed during the two all-state teleconferences
- Responses will also be posted on AAICAMA's web site following the teleconferences
- States may also request written responses by e-mail any time after they are available

Please contact Ursula Gilmore if you have any questions about this process.

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