

# Entering a Medicare Expense

CBMS | Process Manual | Revised: April 2023

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## OVERVIEW

This document provides a step-by-step process for how to complete the data entry on the Medicare Expense page. This data entry is for Members that receive free Part A. For members that must pay into or have conditional coverage, additional or different data entry may be required.

## PROCESS

### Beginning Data Entry

1. Log in to **CBMS**
2. Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home Page
3. Select the Case Number in the results table to access the **Members** page
4. From the Members page, hover over the **Actions** button
5. Select **Begin Interactive Interview** to initiate the I.I. queue
6. On the **Case Questions** page, make sure the radio button for **Does anybody have expenses** is marked 'Yes'
  - a. If left unmarked the **Expense** page will not populate in the Interactive Interview (I.I.) queue
7. Navigate to the **Expense** page
8. Select the **Medicare Expense** sub-tab
9. From the **Name** drop-down, select the person with the Medical Condition/Disability

10. To add a new record, select the **plus (+)** sign in the blue detail header
11. Enter the **Effective Begin Date**
  - a. Refer to **Online Help** for assistance with which date you should use
12. Enter the **Health Insurance Claim # (Number)** OR **Medicare Beneficiary ID**
  - a. This is found on the award letter, SVES or the Medicare card
13. Select the appropriate State from the **Buy-In State** drop-down menu
14. Select 'Monthly' from the **Frequency** drop-down menu
15. Select 'Received' from the **Verification** drop-down menu
16. Select the appropriate **Source** from the drop-down menu

## Part A Section

1. Select the 'Yes' radio button for **Currently Enrolled**
2. Select 'Free Part A' from the **Buy-In Status** drop-down menu
3. Enter the **Part A Approval Date**
  - a. This is found on the award letter, SVES or Medicare card
4. Select the 'No' radio button for **Client Pays**
5. Select 'Other' from the **Payment Method** drop-down menu

## Part B Section

1. Select the appropriate **Buy-In Status** from the drop-down menu
  - a. If it is a Monthly Deduction and client pays is marked 'Yes', select Paid for by beneficiary
  - b. If the case has already been approved for a Medicare Savings Program and client pays is marked 'No', select Paid for by State Buy-In
2. Enter the **Part B Approval Date**
  - a. This is found on the award letter, SVES or Medicare card (this could be different from the Part A approval date)

3. Select the appropriate radio button for Client pays
    - a. Select 'Yes' if this is a new expense to CBMS; when the payment starts being paid by the State, the interface will automatically change the radio button from 'Yes' to 'No'
    - b. Select 'No' if updating an existing payment
  4. Select the appropriate **Payment Method** from the drop-down menu
    - a. Select 'Monthly Deduction' if this is a new expense to CBMS
    - b. Select 'State payment' if updating an existing payment
  5. Enter the current year's **Monthly Premium**
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## ACCESSIBILITY

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