



# Entering Retroactive Medical Assistance

CBMS | Process Manual | Revised: June 2023

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## OVERVIEW

This document provides a step-by-step process for how to complete the data entry of Retroactive Medical Assistance, also referred to as Retro Med. There are 2 pages in the Colorado Benefits Management System (CBMS) that should always be addressed when adding Retro Med to a case; the **Retro Information** page and the **Medical Expense** page. This process will outline the steps needed on both. In addition to those 2 main pages, it is important to note that when Retro Med is requested, and there is income being reported and received during the retro months, the income pages should be completed with declared representative income during the period.

**Behavioral Health Administration (BHA):** Using the retro window for BHA applicants, you are able to request retro months for the Behavioral Health Administration program. Note that the application month cannot be selected for BHA as a retro month and retro months can be requested only for the current application. Retro BHA can only be requested at initial application.

## PROCESS

### Retro Information Page

1. Log into CBMS and
2. Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home Page
3. Click on **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 II queue
6. On the Case Questions page, be sure the **Yes** radio button is selected for **Does anybody have expenses?**
  - a. Selecting No will not populate the Expense page in the Interactive Interview (II) queue
7. Navigate to the **Retro Information** page
  - a. All current and previous MA applications will be listed
  - b. Retro months can be requested only for the current application and not past applications for Behavioral Health
8. Click on the **current application date**
  - a. The related lists will be displayed to the right
9. Click on **Retro Information**
10. Click the **plus (+)** sign in the blue header
  - a. A new pop-up window will appear
11. Click on the **month** that the member is requesting Retro coverage for
  - a. This will highlight the month
  - b. Click the arrow pointing right found in between the boxes
  - c. This action moves the requested month from the left box to the right box
12. **Repeat step 11** until all the months being requested are in the right box
  - a. If a month is moved by mistake, highlight the month in the right box and click on the arrow pointing left.
13. Click **Save**

**Note:** Retro Behavioral Health Administration can only be requested at Initial Application. It cannot be requested when the case is in an ongoing mode.

## Medical Expense Page

1. From the Interactive Interview (II) queue, navigate to the **Expense** page

2. From the **Name** drop-down, select the person requesting Retro Med coverage
3. Click on the **Medical Expense** tab
4. To add a new record, click the **plus (+)** icon
  - a. A new pop-up window will appear
5. Enter the **Effective Begin Date**
  - a. This is the first day of the month of the retro month that is being requested
6. Enter the **Effective End Date**
  - a. This is the last day of the month of the requested retro month
7. Enter the appropriate **Expense Type**
  - a. If not provided, select Medical
8. Select the appropriate **Frequency** from the drop-down
9. Enter the **Date of Service**
  - a. If not provided, enter the first of the retro month requested
10. Select the appropriate **Verification** option from the drop-down menu
11. Select the appropriate **Source** option from the drop-down menu
12. Click **Save**

Repeat the above steps for each separate month being requested.

**Note:** If multiple members are requesting Retro Med, repeat the above steps for each month being requested for each member requesting Retro Med.

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## ACCESSIBILITY

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