

# Update

## Family PACT Client Eligibility, Enrollment and Retroactive Eligibility

### New Status for the Family PACT Program

Family PACT was originally a federal 1115 waiver demonstration program created to show the cost effectiveness of expanded access to family planning. As a demonstration project it required waiver renewals, negotiations with the Centers for Medicare and Medicaid Services (CMS), and limited continuation dates. The Department of Health Care Services submitted a State Plan Amendment (SPA) to transition the Family PACT program into the Medi-Cal State Plan. As approved by CMS, this SPA transitioned the Family PACT from a 1115 waiver program into the State Plan effective retroactive to July 1, 2010.

As a result there are changes to the eligibility process. **Eligibility is based on medical necessity for family planning services, not age.** Another change is a new component to Family PACT which is Retroactive Eligibility. Once a new client has been certified as eligible for Family PACT, the client may also be eligible for Retroactive Eligibility. **If eligible, Retroactive Eligibility can provide reimbursement to clients for expenses incurred for Family PACT-covered services that he or she received during the three-month period prior to the month that they were enrolled in the Family PACT program.** There is a specific Retroactive Eligibility Certification Form that the client completes. The Family PACT provider uses the information on this form to determine retroactive eligibility according to program guidelines and administrative practices.

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### Family PACT Client Eligibility

The Family PACT client eligibility process has changed very little with the new status of the program. Client eligibility determination continues to be done in the Family PaCT provider's office and:

- The information provided by the client is self report - no supporting documentation is necessary
- The client eligibility information is confirmed or updated at each visit
- A client's eligibility must be recertified annually

The Client Eligibility Certification (CEC) form is required for this process since it is the legal document upon which eligibility is based. Clients sign the form to confirm, under penalty of perjury, that the information they have provided is correct. Family PACT providers also sign the form to certify the eligibility or ineligibility of the client.

The Family PACT eligibility criteria are basically the same as they were before the SPA approval. The only change relates to the age of the client. There is no longer an upper age limit for eligibility and there has never been a lower age limit for eligibility. Instead the criterion is medical necessity for family planning. As a reminder, the client eligibility requirements for Family PACT are:

- The client must live in California
- The client must have a medical necessity for family planning- they must be at risk of getting pregnant or causing a pregnancy
- The client has no other form of health care coverage for family planning services
  - If a client has Other Health Coverage, they may still be eligible for Family PACT services if there is a reason their access to that other coverage is impeded. Specifically a client who meets all the

other eligibility requirements can qualify for Family PACT if:

- The other health coverage does not include any family planning benefits; or
  - The client has not met the health plan deductible on the date of service; or
  - The client has Medi-Cal and has an unmet share of cost on the date of service; or
  - The client needs to keep the family planning services confidential from their partner, spouse, or parent which is not possible if the Other Health Coverage is used.
- The client must have a gross family income at or below 200% of the Federal Poverty Level. (The Federal Poverty Level is updated annually and is usually published in a spring Policy Procedures and Billing Instructions (PPBI) manual Bulletin Update, released on the 15th of each month.)
    - When determining the client's income and family size, providers must identify the number of people in the client's household and the total monthly or annual income.
    - Single adults (adult children, or each adult that is living together with another adult) are a family of one;
    - Single minors (less than 18 years old) regardless of where they live, are a family of one;
    - The client plus a spouse are a family of two;
    - To any of the above, add all minor children (< 18) who are related by blood, marriage, adoption, or guardianship and who are living in the home to the family size.

All applicants for Family PACT services must be verbally informed of their eligibility or ineligibility at the time of the certification process.

### Family PACT Client Enrollment

Once a client has been certified as eligible for Family PACT, the provider (or his/her designee) uses the Health Access Programs (HAP) onsite client enrollment system to activate and issue the client's HAP card. Activation must be on or before the date of service for new clients. Without HAP card activation, pharmacy, laboratory and clinical providers will not be able to receive reimbursement for Family PACT services. Providers who neglect to activate the card in a timely manner are responsible for covered services rendered.

The information the client wrote on the CEC form will be entered into the HAP Client Eligibility System when the client is enrolled in Family PACT. Providers are able to use the internet, a Point of Service (POS) device, or the telephone Automated Eligibility Verification System (AEVS) to enroll clients and activate HAP cards.

In order to complete card activation, the Family PACT provider must enter all required information from the CEC form. Through a personal computer with a modem and a browser, the provider can enter client information using the internet which allows data entry at a much faster speed. (Access the Medi-Cal web site at [www.medi-cal.ca.gov](http://www.medi-cal.ca.gov). Go to the "Transaction login" page and enter your user ID and password and click "submit"). This information can also be entered manually into the POS. (For POS device instructions, refer to the *POS Device User Guide. Medi-Cal Home Page, references*). The AEVS is an interactive voice response system (via a touch-tone telephone) where information can be entered. (For AEVS instructions, refer to the *AEVS: Transactions – SOFP* section in the Part 1 Medi-Cal manual). Providers must complete a *Medi-Cal Point of Service (POS) Network/Internet Agreement* before using a POS device or the internet for activation. For the POS device providers also need a *POS Device Usage Agreement*. Refer to the Medi-Cal Web site ([www.medi-cal.ca.gov](http://www.medi-cal.ca.gov)) and click the "Forms" link.

### Retroactive Eligibility

Retroactive Eligibility went into effect on **April 1, 2011** as part of the *State Plan Amendment*. Retroactive eligibility is an opportunity for clients **new to** Family PACT to get reimbursed for family planning and/or reproductive health services they paid for in the three (3) months prior to qualifying for Family PACT benefits.

Providers should simply ask **new** clients **"Have you had any family planning expenses in the last three months?"**

For retroactive eligibility, the following definitions apply:

Family planning expenses include any services the client received that are covered by Family PACT. Those services **did not** have to be provided by a Family PACT or Medi-Cal provider.

Expenses refers to money the client paid for the services or debts they incurred (such as an unpaid medical bill) for the services. The expenses must be substantiated by an itemized receipt or list of services. Expenses do not include co-payments or Share of Cost payments.

# RESOURCES

## Client Eligibility, Enrollment and Retroactive Eligibility Resources

Information and resources about Family PACT Client Eligibility Certification and Enrollment and the new Retroactive Eligibility can be found at [www.familypact.org](http://www.familypact.org) under Providers.

### Under Providers – Client Eligibility Enrollment

- 1-2-3s Identifying, Scheduling, and Enrolling Family PACT Clients
- 2011 Federal Poverty Level Income Guidelines
- Family PACT Retroactive Eligibility Certification and Claim Processes

### Under Providers – Provider Training - Previously Recorded Webcasts

- Client Eligibility, Retroactive Eligibility and Client Enrollment

### Under Providers - Policies, Procedures, and Billing Instructions

- PPBI Manual - Client Eligibility Certification and HAP Card Activation
- PPBI Manual – Client Eligibility Determination

## Updated Family PACT Resources

There are a number of recently updated resources available on [www.familypact.org](http://www.familypact.org) designed to assist providers with staff training and maintenance of their Family PACT program:

- Medical Interpretation Quality Improvement Tool and Provider Assessment
- Helping Your Client Develop a Reproductive Life Plan Tip Sheet
- Family PACT Program Standards Worksheet
- Family PACT Provider Profiles: Interpretation and Utilization of Your Provider Profile Online Module
- Using Medical Interpreters in Family PACT Settings Online Module

## Provider Support Resources

### Family PACT Website

[www.familypact.org](http://www.familypact.org)

Everything you need to know about Family PACT trainings, online modules, client education materials, research and reports, program updates, recorded webcasts and the Family PACT Policies, Procedure and Billing Instructions Manual (PPBI)

### Toll-Free Provider Resource Line

**1-877-FAMPACT (1-877-326-7228)**

Find out more about Family PACT and its benefits

### Office of Family Planning

**1-916-650-0414**

[familypact@cdph.ca.gov](mailto:familypact@cdph.ca.gov)

General Family PACT administration questions

### Provider Telephone Service Center

**1-800-541-5555**

Family PACT billing policies and procedures, all claim services, Appeal Forms and HAP Card orders

### Medi-Cal Website

[www.medi-cal.ca.gov](http://www.medi-cal.ca.gov)

Medi-Cal policy and information, Medi-Cal Bulletins

California Family Health Council, Inc.  
3600 Wilshire Boulevard, Suite 600  
Los Angeles, CA 90010

Update

Family PACT  
Planning • Access • Care • Treatment  
OFFICE OF FAMILY PLANNING  
CALIFORNIA DEPARTMENT OF PUBLIC HEALTH