

**TO:** Local District Commissioners, Medicaid Directors, Third Party Supervisors

**FROM:** Judith Arnold, Director, Division of Coverage & Enrollment Office of Health Insurance Programs

**SUBJECT:** Elimination of Face-to-Face Interview For Medicare Savings Program

**EFFECTIVE DATE:** Immediately

**CONTACT PERSON:** Local District Support Unit:  
Upstate (518)474-8887 NYC (212)417-4500

In an effort to simplify the application process for the Medicare Savings Program (MSP), the face-to-face interview will be waived for potentially eligible MSP applicants. Individuals applying for the Qualified Medicare Beneficiary (QMB), Specified Low Income Medicare Beneficiary (SLIMB), Qualified Individual-1 (QI-1) or Qualified Disabled and Working Individual (QDWI) programs may now complete the application process by mail.

When an individual contacts the local department of social services (LDSS) and asks to apply for the Medicare Savings Program, the LDSS must mail the revised DOH-4328 (copy attached) to the individual. The DOH-4328 is to be used for all Medicare Savings Program applications. The long application, LDSS-2921, is no longer required when an individual is applying for MSP only. Also attached is a sample cover letter that can be sent along with the application and a Medicare Savings Program fact sheet (copy attached). Any other enclosures that are usually sent to applicants must also be included in the mailing.

The date of application will be the date a signed and dated application is received in the Medicaid office. All applicants must provide photocopies of the necessary documentation. The documentation must be kept in the case record with a notation of the date received. Districts are reminded that persons in receipt of Medicare are **not** required to provide documentation of citizenship. District staff should contact the applicant/recipient (A/R) if additional information is needed to process the application. All other requirements for processing applications for the MSP remain unchanged.

The face-to-face interview is eliminated only when the applicant is applying solely for the Medicare Savings Program. If an applicant indicates that they want to apply for Medicaid with or without a spenddown, or if they do not know what program they want to apply for, they must complete the full application and appear for a face-to-face interview according to current procedures.

As a reminder, eligibility for QMB begins the first of the month following the date of the application. SLIMB and QI-1 coverage may be authorized for three months retroactive to the date of the application. However, the QI-1 program may only be retroactive within the current calendar year.