

**Office of Health Insurance Programs (OHIP)**  
**Division of Health Plan Contracting and Oversight (DHPCO)**

**MLTC Plan Legacy Maintenance Guidance**

Issuance Date: 4/8/2026  
Effective Date: 4/8/2026

**Purpose**

This is to provide instruction to MLTC plans on the maintenance of Legacy Statuses in the Uniform Assessment System for New York (UAS-NY) as per MLTC Policy 25.04. This document applies to Managed Long Term Care (MLTC) plans including MLTC Partial Capitation (MLTCP), Medicaid Advantage Plus (MAP), and Programs for All-inclusive Care for the Elderly (PACE) plans.

**Applicability**

- Managed Long-Term Care (MLTC) Policy
- Technical Assistance
- General Guidance

**MLTC Plan Legacy Maintenance – Technical Assistance**

**Timing and Data Sources**

Within the **first five (5) business days of each month**, the MLTC plan must verify that the Legacy Status is correct and update the Legacy Status for newly enrolled individuals, if applicable.

When updating the individual's MLTC Plan Legacy and Personal Care Services / Consumer Directed Personal Assistance Services (PCS/CDPAS) Legacy Status, the MLTC plan must use the reports listed as outlined in the sections below.

**Reports:**

- For Initial Enrollments: eMedNY ADD File
- For Continuous Enrollment Including Transfers: eMedNY ADD File
- For Disenrollments: eMedNY TERM File

**Note:** More information on the reports can be found in the [Initial Enrollments](#), [Transfers](#), [Continuous Enrollment](#) and [Disenrollment](#) sections.

### **Initial Enrollments**

The new plan must utilize the eMedNY ADD file to confirm the individual's enrollment and add the individual to the plan's case list in the UAS-NY. Pursuant to MLTC Policy 25.04, Section C. ii., certain individuals will be granted both MLTC Plan Legacy and PCS/CDPAS Service Legacy Status.

### **Continuous Enrollment Including Transfers**

Members who voluntarily transfer to another MLTC plan or are auto transferred through the involuntary disenrollment process, are considered to have Continuous Enrollment. Individuals who have MLTC Plan Legacy and PCS/CDPAS Service Legacy will retain their Legacy Status when continuously enrolled.

If an individual with Legacy Status is transferred to a new MLTC plan, it is the new plan's responsibility to confirm that the individual has MLTC Plan and PCS/CDPAS Service Legacy. The new plan must utilize the eMedNY ADD file to confirm the individual's enrollment and add the individual to the plan's case list in the UAS-NY.

The MLTC Plan Legacy and PCS/CDPAS Service Legacy Status must be continued for members transferring to another MLTC plan.

If there is a voluntary or involuntary disenrollment in process for one of the reasons listed in the table below, and the individual is re-enrolled prior to their disenrollment effective date, then the individual is considered to have Continuous Enrollment. For more information, refer to the Involuntary Disenrollment policy found [here](#).

<b>Approved Involuntary Disenrollment Reasons for Reinstatement</b>	
<b>Prior to Disenrollment Effective Date</b>	
<b>IL Reason #</b>	<b>Description</b>
<b>27A, 27B, 27C</b>	Enrollee has been absent from the Plan's service area for more than 30 consecutive days
<b>28</b>	Enrollee is hospitalized for 45 consecutive days or longer
<b>35</b>	Enrollee is no longer enrolled in the Plan's aligned Medicare Advantage product
<b>42, 42A</b>	Enrollee does not receive at least one of the CBLTSS within the previous calendar month
<b>50</b>	Enrollee enters a residential program

Approved Involuntary Disenrollment Reasons for Reinstatement Prior to Disenrollment Effective Date	
51	Enrollee is not enrolled in the aligned Medicare health plan, if applicable
53	Enrollee refused to cooperate or was unable to be reached to complete the required assessment

**Continuous Enrollment Scenarios:**

- When the MLTC Plan Legacy and PCS/CDPAS Service Legacy Status is ‘Yes’ and the individual transferred from one MLTC plan to another MLTC plan, no update to MLTC Plan or PCS/CDPAS Service Legacy Status is required.
- When the individual’s MLTC Plan Legacy Status is ‘No’ with an end date of the previous month, i.e. March 31<sup>st</sup>, and the individual’s new enrollment date is the following month, i.e. April 1<sup>st</sup>, the individual is considered to be continuously enrolled. The receiving MLTC plan must update the MLTC Plan Legacy Status to ‘Yes’ and remove the MLTC Plan Legacy Status End Date.

**Note:** The PCS/CDPAS Service Legacy Status is not impacted by disenrollment from an MLTC plan and should not be removed.

**Reminders:**

- If an MLTC plan identifies that MLTC Plan Legacy Status should be ‘Yes’ after a transfer from another MLTC plan and the enrollee meets the criteria for MLTC Plan Legacy Status, the new plan can add MLTC Plan Legacy Status as outlined in MLTC Policy 25.04.
- PCS/CDPAS Service Legacy Status must be added when MLTC Plan Legacy Status is added.

**Additional Resources**

Additional guidance on the mechanics of updating MLTC Plan Legacy and PCS/CDPAS Service Legacy Status is available in the UAS-NY for users with edit access to Legacy Status. *1260-LTC Updating Legacy* can be accessed under Recommended Courses on

the Role/Confirmation page in the UAS-NY. The Department will continue to monitor compliance with the trainings and policies issued for Minimum Needs Requirements including maintaining Legacy Status. Non-compliance by MLTC plans may result in corrective action by the Department.

**Note:** To verify legacy status history please see the following screenshots and refer to *1025-LTC Working with Demographic Information*. Either *Multimedia Activity 2.1* or *Reference Guide Activity 3.2*.

**MLTC Plan Legacy**

MLTC Plan Legacy Status  No  Yes

MLTC Plan Legacy Status Start Date

MLTC Plan Legacy Status End Date

[Edit Plan Legacy](#)

## ALLEN ANDERSON

History for [Print](#)

MLTC Plan Legacy  
MLTC Plan Legacy Status

Date/Time	IP Addr	User ID	New Value	Old Value
Jan 07 2026 13:07:18	00.00.00.00	zzz01	No	Yes

### Disenrollment

For individuals disenrolled from the MLTC Program, the MLTC plan must edit the MLTC Plan Legacy Status on the **last business day** before the disenrollment effective date. The individual's disenrollment must be confirmed using the eMedNY TERM file by reviewing Loop 2750. When N102 = WMS ENROLL/DISENROLL REASON CODE is available, the field will contain the value code from the WMS Enroll/Disenroll Reason

Code table. The disenrollment reason codes and descriptions are listed in the [Medicaid Managed Care Enrollment Companion Guide](#).

After confirming the individual's disenrollment from the MLTC Program, the MLTC Plan Legacy Status must be modified in the UAS-NY by entering the last date of enrollment in the MLTC Plan Legacy End Date field. UAS-NY will automatically update the MLTC Plan Legacy status to 'No' at midnight on the day after the MLTC Plan Legacy End Date is entered. Updates to the MLTC Plan Legacy Status should be made before the individual is disenrolled from the Plan in the UAS-NY.

**Note:** PCS/CDPAS Service Legacy Status is not impacted by an MLTC disenrollment and should not be changed.

### References

[MLTC Policy 25.04](#) - *Minimum Needs Requirement Update to the Eligibility Requirements for Managed Long Term Care Enrollment*

[Medicaid Managed Care Enrollment Companion Guide](#)

### Contact Information

For inquiries or assistance regarding this technical assistance, please contact:  
**Bureau of Managed Long Term Care - New York State Department of Health**  
[mltinfo@health.ny.gov](mailto:mltinfo@health.ny.gov).