

CHAPTER 1

APPLICATION & SCREENING

AIS CALL CENTER

General Information

The In-Home Supportive Services (IHSS) Program provides assistance to eligible aged, blind, and disabled individuals who are unable to remain safely in their own homes and who would, without IHSS services, require out-of-home care.

An applicant, or any person acting on behalf of an applicant, may submit an application to Aging and Independence Services (AIS) requesting an evaluation for IHSS. Applications are submitted through telephone requests to the **AIS Call Center at 1-800-510-2020**. Medical professionals (e.g. hospital discharge planners) may submit a web referral through the internet if registered for access to the web referral system. Medical professionals who are interested in becoming registered web referral users can be referred to the AIS Call Center. Parties outside of San Diego County can reach the Call Center by calling 1-800-339-4661.

Confidentiality of public records for applicants and or recipients of public assistance is addressed in the State Welfare and Institutions Code, Section 10850. All information and records related to IHSS will be considered confidential and will be safeguarded.

Call Center Intake Process

The following steps are used by Call Center staff when receiving IHSS application requests:

1. The Call Center Specialist (CCS) receives a telephone call regarding the IHSS program.
2. The CCS will give a brief description of IHSS and screen for potential eligibility to the program.
3. The CCS reviews the applicant's income and resources (liquid assets) to determine if the applicant is within the IHSS resource limits.
4. If the applicant's income and resources exceed the IHSS Program's maximum limits, the CCS informs the caller of the reason for possible ineligibility and refers the caller to other programs for which the applicant might qualify.
5. The following information about the applicant is required to complete the application process:
 - Name
 - SSN
 - Date of birth
 - Applicant's preferred spoken and written languages
 - Gender
 - Ethnicity
 - County of residence
 - Residence and mailing addresses

- Applicant's primary phone number
6. The CCS will complete the *Call Center Case Note Template* (Attachments 1-H) for each application and copy the information into a *Case Note* once the case has been created. The *Case Note* will include the following information: the applicant's health history, location of the applicant, emergency contact information, need for services, companion case information, and information of employees of HHSa that are related to the applicant. Other information may be included, as appropriate.

Any individual has the right to apply for IHSS. If the caller chooses to continue the application process, the CCS will document this information in the Call Center Case Note Template.

Processing IHSS Applications

IHSS applications are processed by Call Center Specialists (CCS) using CMIPS II. In order to process an IHSS application, the CCS must do the following:

1. Select *New Application* using the *Person Home Screen* and conduct a person search of the individual using one of the following criteria:
 - Last name (a full name or a partial name of three letters can be used)
 - Social Security Number
 - Client Index Number (CIN)

The CIN number can be found on the Medi-Cal Benefits Identification Card (BIC) and is referred to as a BIC number.

2. If the applicant does not exist in CMIPS II, select *Continue Application*, complete the information in the required fields and then select *Create Case*.
3. If the applicant exists in CMIPS II as a(n):
 - **Open Referral:**
 - a. Update the applicant's contact information in the *Person Home Screen* and select *Create Case*.
 - b. Update the *IHSS Referral Date* in the *Create Case* screen.
 - **Closed Referral:**
 - a. Update the applicant's information and select *Create Case*.
 - **Applicant** in a case that is in **Pending** status:
 - a. Verify that the caller is the applicant.
 - If the caller is the applicant, refer them to the assigned Social Worker.
 - If the caller is not the applicant:
 - a) Add a *Case Note* using the *Call Center Case Note Template*.
 - b) Email the IHSS Assignment Clerk and his/her supervisor to inform them that the applicant has reapplied.

- **Applicant** in a case that is in **Withdrawn/Denied** status:
 - a. Update the applicant's contact information in the *Person Home Screen*
 - b. From the *Case Home Screen*, click on *Reactivate*.
 - c. Complete the *Reactivate Case Screen* and reassign the case to the designated IHSS Assignment Clerk.
 - d. Copy the *Call Center Case Note Template* information into a *Case Note*.
- **Recipient** in a case that is in **Terminated** status for **more than 30 days**:
 - a. Update the recipient's contact information in the *Person Home Screen*.
 - b. Select the *Case Number* to go to the *Case Home Screen*.
 - c. From the *Case Home Screen*, click on *Reactivate*.
 - d. Complete the *Reactivate Case Screen* and reassign the case to the designated IHSS Assignment Clerk.
 - e. Copy the *Call Center Case Note Template* information into a *Case Note*.
- **Recipient** in a case that is in **Terminated** status **30 days or less**:
 - a. Update the recipient's contact information in the *Person Home Screen*.
 - b. Do not reactivate the case.
 - c. Copy the *Call Center Case Note Template* information into a *Case Note*.
 - d. Email the IHSS Assignment Clerk and his/her supervisor to inform them that the recipient has reapplied.
- **Recipient** in a case that is in **Leave** status:
 - a. Verify that the caller is the recipient.
 - If the caller is the recipient:
 - a) Have the caller contact the Social Worker directly.
 - b) Provide the contact information to the recipient.
 - If the caller is not the recipient:
 - a) Complete the *Call Center Case Note Template* and copy the information into a *Case Note*.
 - b) Email the IHSS Assignment Clerk and his/her supervisor to inform them that the recipient has reapplied.
- **Recipient** in a case that is in **Eligible** status:
 - a. Verify that the caller is the recipient.
 - If the caller is the recipient, refer them to the assigned Social Worker.
 - If the caller is not the recipient:
 - a) Add a *Case Note* using the *Call Center Case Note Template*.
 - b) Email the IHSS Assignment Clerk and his/her supervisor to inform them that the recipient has reapplied.
- **Provider**:
 - a. Review the *Residence Address* and *Primary Phone Number* in the *Person Home* screen.
 - If the information is correct, select *Create Application*.
 - If the *Residence Address* and *Primary Phone Number* need to be updated:
 - a) Select *Contact* from the left navigation menu.

- b) Select the *Addresses* or *Phone Numbers* link to update the information.
 - c) Select *New* link, do not select *Edit* link.
 - d) Update the information and then select *Save*.
- b. Select *Home* from the left navigation menu.
- c. Select the *Create Application* link at the *Person Home* screen.
- d. Update applicant's information and select *Create Case*.
- ***Inter-County Transfer (Recipient in a CMIPS II County):***
 - a. Verify that the caller is the applicant.
 - If the caller is the applicant, inform the applicant that they must contact their Social Worker to initiate an Inter-County Transfer.
 - If the caller is not the applicant:
 - a) Complete the *Call Center Case Note Template*.
 - b) Email the *Call Center Case Note Template* to the IHSS Assignment Clerk and his/her supervisor to inform them that the recipient has applied for IHSS but is currently a recipient in a CMIPS II County. The IHSS Assignment Clerk will contact the case owner of the active case to inform them that the recipient has applied in San Diego County.
- ***Inter-County Transfer (Recipient in a Legacy CMIPS County):***
 - a. If the applicant does not exist in CMIPS II, select *continue application*.
 - b. Complete the information in the required fields.
 - c. Select *Create Case*.
 - If the caller is the applicant, inform the applicant that they must contact their Social Worker to initiate an Inter-County Transfer.
 - If the caller is not the applicant, the assigned Social Worker will notify the applicant that they must contact their Social Worker to initiate an Inter-County Transfer.

Person Type Definitions

CMIPS II will automatically assign the Person Type. Individuals existing in the system will be identified as one of the following person types:

Referral – An individual inquiring about services for another person. For example, a neighbor, relative, or case worker may request assistance for someone else.

Open Referral – Created when someone contacts IHSS requesting services on behalf of another person or oneself.

Closed Referral – Created when a referred individual informs a worker he/she does not want to receive services from IHSS. The person type changes from open referral to closed referral.

Applicant – An individual requesting IHSS services and for whom an IHSS case is created but not yet approved.

Recipient – An individual requesting IHSS services and for whom an IHSS case is created and approved.

Provider – An individual who provides IHSS services to a recipient.

Since AIS uses a centralized call center, at this time the referral type will not be used.

Case Assignment to District Office (D.O.) Clerical

The CCS will assign the application to the designated D.O. clerk in the office that is indicated by the applicant’s zip code. This information is located on the document *IHSS District Office Zip Codes*.

1. When the “Assigned Worker” magnifying glass is selected, the *User Search Screen* displays. This screen allows the user to search for and select the case owner when assigning the case.

2. Select the designated D.O. clerk corresponding to the applicant’s zip code.

Client Index Number

The Client Index Number (CIN) is a ten-digit unique alphanumeric value assigned by the Statewide Client Index (SCI) that identifies individuals who have applied for public benefits.

1. Click on the magnifying glass on the *Client Index Number* area to search Medi-Cal eligibility. When there is a matching CIN number associated with the case, a list will populate at the bottom of the screen. Choose the CIN number associated with the applicant. If there is no CIN number associated with the applicant, leave the field blank.

2. When the “Save” link is selected from the *Create Case Screen* and the Client Index Number field is blank, the *Create Case without CIN* pop-up displays. Select “Save” to complete creating the case.

A CIN search must be conducted in order to create a case. An error message will display if the search is not initiated. When a case is created without a CIN, an IHSS Referral for Medi-Cal Eligibility Determination transaction will be sent to the County SAWS requesting a Medi-Cal Eligibility Determination for the IHSS Applicant.

Case Number

An applicant will be assigned a random Case Number consisting of seven (7) digits, for example, 1234567. This number is part of the Person Record and will remain as the Case Number for an applicant/recipient for the life of the case record, even if the recipient moves to another county.

Once an application is created, the CCS will provide the case number to the applicant or authorized representative and inform them that the applicant will receive a letter from the IHSS program within ten (10) calendar days. The letter will inform the applicant of the name and telephone number of the IHSS Social Worker assigned to process the application.

Clerical Contact List

The public information telephone numbers for the IHSS district offices are:

El Cajon	(619) 401-3900	Oceanside	(760) 754-3515
Escondido	(760) 480-3424	South Bay	(619) 476-6200
Overland	(858) 694-2123		