County Medical Services Program Guide (CMSPG) Letter #23

Medi-Cal Program Guide (MPG) Letter #770

January 02, 2013

Subject	**LOW INCOME HEALTH PROGRAM (LIHP) AND COUNTY MEDICAL SERVICES (CMS) CASE CLEARANCE PROCEDURES**
Effective Date	Upon receipt.
Reference	County Policy
Purpose	To inform staff of a change to the case clearance instructions for LIHP and CMS.
Background	Prior to the issuance of LIHP/CMS benefits, the applicant's Social Security Number (SSN) or name must be cleared on the county and state computer systems to prevent duplicate or erroneous issuance of benefits. The worker reviews, images, and saves the following screens into the case file: • CMS IT System (AuthMed) • IDX • Medi-Cal Eligibility Data System (MEDS) • CalWIN Results of the inquiry and action taken by the worker are entered in case comments.
Highlighted Changes	It is no longer required for the worker to image and save the IDX, MEDS, and CalWIN clearance inquiries into DoReS or AuthMed. IDX comments and alerts have been added and can now be found in the **Member Alerts** tab in the **APPLICATION WORKLIST** window of AuthMed. Refer to Appendix 09.01B and Appendix A.07.01A to view comment entries and alerts in AuthMed.

Required Actions

Prior to the issuance of LIHP/CMS benefits, the worker shall:
- clear the applicant on MEDS, CalWIN, and CMS IT Systems (Member Alerts) using their SSN or name; and
- document the results of the inquiry and actions taken in case comments.

CMS IT System Impact

IDX comments and alerts can now be found in the **Member Alerts** tab in the **APPLICATION WORKLIST** window of the CMS IT System (AuthMed).

Forms Impact

No impact.

ACCESS Impact

No impact.

Quality Control Impact

Effective with the February 2013 review month, Quality Control will cite the appropriate error on any case that does not comply with the requirements outlined in this letter.

Summary of Changes

The table below shows the changes made to the CMSPG.

Article	Changes
02.01.01	• Updated the Table of Contents • Added case clearance instructions
02.10.01B	Removed requirement of IDX screen print on file
09.01.01	• Updated the Table of Contents • Moved application clearance instructions to 02.01.01 • Added Appendix 9B
09.02.01A	Removed requirement of screen prints on file

The table below shows the changes made to Article A of the MPG.

Article	Changes
A.02.03	• Updated the Table of Contents • Added case clearance instructions
A.07.01	• Updated the Table of Contents • Moved application clearance instructions to A.02.03 • Added Appendix 7A
A.07.02A	Removed requirement of screen prints on file

Approval for Release

CKhoury

Robt Wynn, Dep. Broker 1-8-13

JP

Article 2 Section 01 Application Process

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02.01.01E Case Clearance

The applicant's Social Security Number (SSN) or name must be cleared prior to the issuance of CMS benefits to prevent duplicate or erroneous issuance of benefits.

Clearances shall include but are not limited to, any of the following systems:

System	Window	Description
CMS IT System (AuthMed)	APPLICATION WORKLIST - Member Alerts	Recording of comments/alerts/case activities
MEDS	INQN	Applicant Inquiry by Name and Date of Birth
	INQM	Primary Medi-Cal/CMSP Information
	INQP	Pending/Denied SSI Application and Appeals Information
	INQT	Bendex Title II Information
	INQX	Title XVI-SSI/SSP
	INQ1, 2, & 3	Medi-Cal/SSP- Special Programs 1, 2, and 3 Information
	IEVS - EDD Real-Time Match	Unemployment and State Disability Claim Information

| CalWIN | Inquiry | Inquire on Individual |
| | Case Details | Programs, Application List, and Case Members |

Article 2 Section 10 Approvals

02.10.01B
CMS
Approved
Medi-Cal
DDSD Needed
(HOS)

The worker opens an automated Medi-Cal case on CalWIN and places it in a pending status. The worker must also evaluate for retroactive Medi-Cal when the applicant/beneficiary has had CMS coverage in the retroactive period. The HOS worker shall assist applicants, as needed, with the Medi-Cal application process including helping them complete the State of Facts and DDSD packet (refer to Medi-Cal Linkage in 02.05 for more instructions). **The HOS worker CANNOT approve CMS until the Medi-Cal application and DDSD packet are received fully completed and all eligibility and verification requirements for both Medi-Cal and CMS have been met.** In addition, CMS should <u>not</u> be certified if there is a pending fraud investigation on the Medi-Cal application. The date the DDSD packet was sent must be recorded on the CalWIN Disability screen within 30 days from the date of application.

Reminder: Refer to MPG 5.4.1 regarding when to submit the DDSD packet

Note: If CalWIN Disability Screen input is not completed within 30 days from the date of application, all CalWIN entries will fail. The worker records the CMS certification period and the date the DDSD packet was imaged into DoReS in case comments of the CMS and Medi-Cal case. This entry alerts the CMS Recovery Specialist that there is potential reimbursement from Medi-Cal to CMS. The HOS worker then sends the Medi-Cal case to the DDSD worker at the Family Resource Centers (FRC). Upon approval or denial of Medi-Cal, the DDSD FRC worker sends form 14-10 HHSA to the ASO at 0557B.

Article 9 Section 01 CMS Information Technology (IT) System

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Appendix 9B CMS IT System Member Alert Screen

APPLICATION WORKLIST										
Dates	Tracking	Verifications	PCC	Budgets	Notifications	Docs	Comments	Indicators	**Member Alerts**	SOC

New Member Alerts

Current Member Alerts

Alert	Reason	Date	Created Date	Created By

Removed Member Alerts

Alert	Reason	Date	Created Date	Created By	Removed Date	Removed By

Historical IDX Member Alert

SSI P 7/18/07 @ "H" LVL PAJU 9/10/07; SSI D 7/6/07 @ "R" LVL PAJU 8/10/07

09.02.01 IDX Computer System

09.02.01A General	Below are instructions for recording case activity, including some of the different types of alerts, comment entries and status codes entered on the IDX system to assist staff with the processing of CMS cases (*Refer to Appendix 09.02A).* IDX comments and alerts have been added and can now be found in the **Member Alerts** tab in the **APPLICATION WORKLIST** window of AuthMed (*Refer to Appendix 09.01B on how to view comment entries and alerts).*
	Prior to issuing benefits, the worker shall check for these alerts and entries entered in the **Member Alerts** tab in the **APPLICATION WORKLIST** window of the CMS IT System (AuthMed) and document the action taken in case comments.

Article A Section 02.03 Application Process

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**A.02.03I
Case
Clearances**

The applicant's Social Security Number (SSN) or name must be cleared **prior** to the issuance of LIHP benefits to prevent duplicate or erroneous issuance of benefits.

Clearances shall include but are not limited to, any of the following systems:

System	Window	Description
CMS IT System (AuthMed)	APPLICATION WORKLIST - Member Alerts	Recording of comments/alerts/case activities
MEDS	INQN	Applicant Inquiry by Name and Date of Birth
	INQM	Primary Medi-Cal/CMSP Information
	INQP	Pending/Denied SSI Application and Appeals Information
	INQT	Bendex Title II Information
	INQX	Title XVI-SSI/SSP
	INQ1, 2, & 3	Medi-Cal/SSP- Special Programs 1, 2, and 3 Information
	EDD Real-Time	Unemployment and State Disability

	Match	Claim Information
CalWIN	Inquiry	Inquire on Individual
	Case Details	Programs, Application List, and Case Members

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A.07.01 CMS IT System

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TITLE	PG CITE
General	**A.07.01A**
Applications and Verifications	**A.07.01B**
Notices of Action (NOAs)	**A.07.01C**
Approvals	**A.07.01D**
Denials	**A.07.01E**
CalWIN Interface	**A.07.01F**
Citizenship Codes Available in MEDS	**A.07.01G**
CMS IT System Member Alert Screen	**APPENDIX 7A**

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A.07.01A General

The CMS IT System is a web-based eligibility system (sdcmsapps.com). All LIHP applications will be processed and maintained on the CMS IT System. All case documentation and verifications will be stored on the CMS IT System. The CMS IT System also affords LIHP contracted providers the ability to access the Provider Online Verification (POV) website (www.sdcmspov.com) to view LIHP case status

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Appendix 7A CMS IT System Member Alert Screen

APPLICATION WORKLIST

| Dates | Tracking | Verifications | PCC | Budgets | Notifications | Docs | Comments | Indicators | **Member Alerts** | SOC |

New Member Alerts

Current Member Alerts

| Alert | Reason | Date | Created Date | Created By |

Removed Member Alerts

| Alert | Reason | Date | Created Date | Created By | Removed Date | Removed By |

Historical IDX Member Alert

SSI P 7/18/07 @ "H" LVL PAJU 9/10/07; SSI D 7/6/07 @ "R" LVL PAJU 8/10/07

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A.07.02 IDX Computer System

**A.07.02A
General**

Below are instructions for recording case activity, including some of the different types of alerts, comment entries and status codes entered on the IDX system to assist staff with the processing of LIHP cases (Refer to *Appendix 07.02A*). IDX comments and alerts have been added and can now be found in the **Member Alerts** tab in the **APPLICATION WORKLIST** window of AuthMed (*Refer to and Appendix 07.01A on how to view comment entries and alerts).*

Prior to issuing benefits, the worker shall check for these alerts and entries entered in the **Member Alerts** tab in the **APPLICATION WORKLIST** window of the CMS IT System (AuthMed) and document the action taken in case comments.

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