

**County Medical Services  
Program Guide (CMSPG)  
Letter #23**

**Medi-Cal Program Guide (MPG)  
Letter #770**

January 02, 2013

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**Subject**            **LOW INCOME HEALTH PROGRAM (LIHP) AND COUNTY  
MEDICAL SERVICES (CMS) CASE CLEARANCE PROCEDURES**

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**Effective Date**    Upon receipt.

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**Reference**            County Policy

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**Purpose**                To inform staff of a change to the case clearance instructions for LIHP  
and CMS.

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**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.

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**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.

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**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.

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**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).

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**Forms Impact**

No impact.

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**ACCESS Impact**

No impact.

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**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.

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**Summary of Changes**

The table below shows the changes made to the CMSPG.

<b>Article</b>	<b>Changes</b>
<a href="#">02.01.01</a>	<ul style="list-style-type: none"><li>• Updated the Table of Contents</li><li>• Added case clearance instructions</li></ul>
<a href="#">02.10.01B</a>	Removed requirement of IDX screen print on file
<a href="#">09.01.01</a>	<ul style="list-style-type: none"><li>• Updated the Table of Contents</li><li>• Moved application clearance instructions to 02.01.01</li><li>• Added Appendix 9B</li></ul>
<a href="#">09.02.01A</a>	Removed requirement of screen prints on file

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

<b>Article</b>	<b>Changes</b>
<a href="#">A.02.03</a>	<ul style="list-style-type: none"><li>• Updated the Table of Contents</li><li>• Added case clearance instructions</li></ul>
<a href="#">A.07.01</a>	<ul style="list-style-type: none"><li>• Updated the Table of Contents</li><li>• Moved application clearance instructions to A.02.03</li><li>• Added Appendix 7A</li></ul>
<a href="#">A.07.02A</a>	Removed requirement of screen prints on file

Approval for  
Release

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CKhoury

Rest Wm, Dep. Dir. 1-8-13

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JP

## Article 2 Section 01 Application Process

### Table of Contents

TITLE	CMS PG CITE
<b>Application Process</b>	<a href="#"><u>02.01.01</u></a>
Overview	<a href="#"><u>02.01.01A</u></a>
Good Cause	<a href="#"><u>02.01.01B</u></a>
Reporting changes in a Timely Manner	<a href="#"><u>02.01.01C</u></a>
Case Narrative	<a href="#"><u>02.01.01D</u></a>
Case Clearances	<a href="#"><u>02.01.01E</u></a>
<b>Date of Application</b>	<a href="#"><u>02.01.02</u></a>
Hospital Outstation Services (HOS)	<a href="#"><u>02.01.02A</u></a>
Non-HOS Workers	<a href="#"><u>02.01.02B</u></a>
Date of Application Exceptions	<a href="#"><u>02.01.02C</u></a>

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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

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## Article 2 Section 10 Approvals

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02.10.01B  
 CMS  
 Approved  
 Medi-Cal  
 DDS D 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 DDS D packet (refer to Medi-Cal Linkage in [02.05](#) for more instructions). **The HOS worker CANNOT approve CMS until the Medi-Cal application and DDS D packet are received fully completed and all eligibility and verification requirements for both Medi-Cal and CMS have been met.** In addition, CMS should not be certified if there is a pending fraud investigation on the Medi-Cal application. The date the DDS D 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 DDS D 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 DDS D 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 DDS D worker at the Family Resource Centers (FRC). Upon approval or denial of Medi-Cal, the DDS D FRC worker sends form 14-10 HSA to the ASO at 0557B.

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## Article 9 Section 01 CMS Information Technology (IT) System

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**Table of Contents**

<b>TITLE</b>	<b>CMS PG CITE</b>
<b>CMS IT System</b>	<a href="#"><u>09.01.01</u></a>
General	<a href="#"><u>09.01.01A</u></a>
Notices of Action (NOAs)	<a href="#"><u>09.01.01B</u></a>
Approval/Denial Action	<a href="#"><u>09.01.01C</u></a>
Credit Report	<a href="#"><u>09.01.01D</u></a>
<b>CalWIN Interface</b>	<a href="#"><u>09.01.02</u></a>
General	<a href="#"><u>09.01.02A</u></a>
Applications referred to CalWIN	<a href="#"><u>09.01.02B</u></a>
Citizenship codes available in MEDS	<a href="#"><u>09.01.02C</u></a>
<b>CMS IT System Rescind/Repend Screen</b>	<a href="#"><u>APPENDIX 9A</u></a>
<b>CMS IT System Member Alert Screen</b>	<a href="#"><u>APPENDIX 9B</u></a>

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## **Appendix 9B CMS IT System Member Alert Screen**

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**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

SSIP 7/18/07 @ "H" LVL PAJU 9/10/07; SSID 7/6/07 @ "R" LVL PAJU 8/10/07

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## 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

**Table of Contents**

TITLE	PG CITE
Good Cause	<a href="#">A.02.03A</a>
Statement of Facts	<a href="#">A.02.03B</a>
Application Date	<a href="#">A.02.03C</a>
Failed to Attend Interview	<a href="#">A.02.03D</a>
Applicant Responsibility	<a href="#">A.02.03E</a>
Case Handling	<a href="#">A.02.03F</a>
Clinic Assignment	<a href="#">A.02.03G</a>
Authorized Representative (AR)	<a href="#">A.02.03H</a>
Case Clearances	<a href="#">A.02.03I</a>

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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

### Table of Contents

TITLE	PG CITE
General	<a href="#">A.07.01A</a>
Applications and Verifications	<a href="#">A.07.01B</a>
Notices of Action (NOAs)	<a href="#">A.07.01C</a>
Approvals	<a href="#">A.07.01D</a>
Denials	<a href="#">A.07.01E</a>
CalWIN Interface	<a href="#">A.07.01F</a>
Citizenship Codes Available in MEDS	<a href="#">A.07.01G</a>
<b>CMS IT System Member Alert Screen</b>	<b><a href="#">APPENDIX 7A</a></b>

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### A.07.01A General

The CMS IT System is a web-based eligibility system ([sdcmsapps.com](http://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](http://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

SSIP 7/18/07 @ "H" LVL PAJU 9/10/07; SSID 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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