

Medi-Cal Program Guide Letter (MPG) # 773

December 28, 2012

Subject REVISIONS TO ARTICLE 5 SECTION 4 DISABILITY DETERMINATION SERVICES DIVISION (DDSD) REFERRALS

Effective Upon Receipt

Reference County Policy

Purpose To inform staff of the revisions made to the following:

- Disability decisions received process
- Actions to be taken when a disability decision grants disability status
- DDSD Quarterly Reports
- MPG 5.4 Appendices A through G
- Presumed disability and Aid Code 53
- How to identify a DDSD referral

Background **Disability Decisions**
Per current business process, the State mails DDSD decisions to CMS Recovery. Upon receipt, CMS Recovery photocopies the decisions and forwards the hardcopies to appropriate FRC's for processing.

Disability Granted by DDSD
Worker instructions for the processing of disability decisions currently do not include requirements for follow up action on active Low Income Health Program (LIHP) cases.

DDSD Quarterly Reports
ACCESS electronically forwards DDSD Quarterly Reports (in PDF format) to designated DDSD liaisons at FRC's and CMS Recovery.

Presumed Disability and Aid Code 53
Aid code 53 is only for residents of a skilled nursing home or intermediate care facility. Patients who are no longer in the skilled nursing facility are to be discontinued timely and with appropriate notice.

When a Medi-Cal beneficiary alleging a disability is not currently considered disabled and other linkage no longer exists, the individual alleging the disability may receive Medi-Cal benefits under a Pending Disability Determination aid code until a disability determination is

made. This applies to beneficiaries who are discontinued from aid code 53.

Highlighted Changes

Disability Decisions

Disability decisions will be sent by DDSD to the Document Processing Center (DPC). The DPC will capture image the disability determination and forward the hardcopies to CMS Recovery at MS 0557A within three business days.

NOTE: Disability decisions are identified on a separate tab in the [Daily DPC Report](#) for processing assignment.

Disability Granted by DDSD

Worker instructions for the processing of disability decisions now include follow up actions to be taken on active LIHP cases.

DDSD Quarterly Reports

The DDSD Quarterly Report is available in [SharePoint](#) it filters the following information:

Subject	Description
State Pending	Number of disability applications pending with DDSD.
State Closed	Number of disability applications closed with DDSD.
CalWIN Pending	Number of DDSD cases pending in CalWIN that are not pending with DDSD.
CalWIN Closed	Number of disability applications pending with DDSD that are closed in CalWIN.
Decisions Imaged	Number of disability decisions imaged in DoReS.
Action Taken	Number of applications with disability decisions received from DDSD and MC Program is approved/denied in CalWIN.
Action Pending	Number of applications with disability decisions received from DDSD and MC Program is <u>NOT</u> approved/denied in CalWIN.
No Match	Number of applications pending or closed with DDSD that have no MC application in CalWIN to match the application date.

Presumed Disability and Aid Code 53

When a Medi-Cal beneficiary alleging a disability is not currently considered disabled and other linkage no longer exists, the individual alleging the disability may receive Medi-Cal benefits under a Pending Disability Determination aid code until a disability determination is

made. This will not apply to beneficiaries who are discontinued from aid code 53.

Appendices A through G

MPG 5.4 Appendices A through G are relocated to [MPG Article B Resources and Desk Aid section](#).

Required Action

Disability Decisions

Disability Decisions will be processed as outlined in [MPG 5.4.8a](#).

Disability Granted by DDSD

As part of the approval process, when the disability determination is granted by DDSD, workers shall clear applicant/beneficiaries information in AuthMED:

If ...	Then ...
active LIHP	discontinue LIHP as outlined in MPG Article A.06.02
no active LIHP application	no action is necessary

DDSD Quarterly Reports

DDSD Quarterly Reports must be reviewed and processed as outlined in the following MPG sections:

Report Section	MPG Section
State Pending and CalWIN Pending	5.4.12c
State Closed and Decisions Imaged in DoReS	5.4.12d
CalWIN Closed	5.4.12e
Action Pending	5.4.12f
No Match	5.4.12g

Presumed Disability and Aid Code 53

Beneficiaries discontinued from aid code 53 must be processed as follows:

If aid code 53 beneficiary is ...	Then ...
alleging a disability	keep the case in pending status
not a alleging a disability	discontinue case and provide timely notice

Automation Impact

No Impact.

Forms Impact No Impact.

Access Impact No Impact.

Imaging Impact DDSD will send all disability decisions to the DPC. DPC staff will take the following steps when disability decisions are received:

Step	Action
1	Scan the disability decision.
2	Validate the disability decision as form NFM SP2 DDSD 221R.
3	Forward hardcopies of disability decision to CMS Recovery.

PA (CalFresh or CalWORKs) Program Impact No Impact.

QC Impact Effective with the December 2012 review month, Quality Assurance 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 in the MPG cites.

Section	Summary of Change
Article 5, Section 4.2	<ul style="list-style-type: none">• Pending Disability Aid Codes not applicable to 53 aid code
Article 5, Section 4.8	<ul style="list-style-type: none">• Disability decisions• Disability granted by DDSD
Article 5, Section 4.12	<ul style="list-style-type: none">• DDSD Reports

Approval for Release

Choupy
Dep. Dir. 1-4-13

CG

5.4.2 Pending Disability Determination Aid Codes

A. Pending Beneficiaries Aid Codes

When a Medi-Cal beneficiary alleging a disability is not currently considered disabled and other linkage no longer exists, the individual alleging the disability may receive Medi-Cal benefits under a Pending Disability Determination aid code until a disability determination is made. This does not apply to beneficiaries who are discontinued from aid code 53. Beneficiaries discontinued from aid code 53 must be processed as follows:

ACWDL
02-40

State
Clarifica-
tion

If aid code 53 beneficiary is ...	Then ...
alleging a disability	keep the case in pending status
not a alleging a disability	discontinue case and provide timely notice

ACWDL
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If the individual meets the criteria, the worker shall initiate a DDSD referral and the individual will be placed in the appropriate PD aid code:

Aid Code	Description
6J	Full Scope – Zero SOC
6R	Full Scope – SOC
5J	Restricted Scope – Zero SOC
5R	Restricted Scope - SOC

Note: The above aid codes will not be used when the beneficiary is eligible under another Med-Cal aid code or reports a disability more than 30 days after the discontinuance for loss of linkage.

When a CalWORKs recipient is discontinued due to loss of linkage and the individual alleges a disability, the worker must use all other case information to establish continuing Medi-Cal eligibility. The only additional information required is the client's written statement of disability and the completed DDSD packet. The worker will submit the completed DDSD packet within 10 days of receipt as outlined in [MPG 5.4.1d](#) and the recipient will be placed in a PD aid code.

Note: The redetermination date will be aligned with the renewal date of the CalWORKs case.

[MPG LTR 773 \(12/12\)](#)

5.4.8 DDSD Response

**A.
DDSD
Response**

Disability Decisions must be processed within 5 days of receipt as follows:

County
Policy

Step	Action
1	DPC is responsible for: <ul style="list-style-type: none"> capture imaging Disability Decisions received from DDSD validating the Disability Decision as NFM SP2 DDSD 221R forwarding Disability Decision hardcopies to CMS Recovery at MS 0557A within three business days
2	FRC staff will be responsible for: <ul style="list-style-type: none"> reviewing the Daily DPC Report (DDSD tab) assigning disability decisions imaged to appropriate task for processing ensuring accurate processing of disability decision within 2 business days

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**C.
Disability
Granted by
DDSD**

DDSD will attach the disability decision to the MC 221. If DDSD determines the applicant is disabled, the applicant will be considered disabled under MN criteria.

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The onset date provided will take into consideration any request for up to three months retroactive coverage prior to the date of application as long as the worker has requested retro onset on form MC 221. Refer to [MPG Article 4, Section 15](#) for guidelines on annual redetermination for DDSD cases.

ACWDL
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When the disability decision is received the worker shall:

Step	Action						
1	Enter the DDSD decision in the Display Disability/Medical Conditions Summary screens in CalWIN						
	<table border="1"> <thead> <tr> <th>If the case is in...</th> <th>This will...</th> </tr> </thead> <tbody> <tr> <td>pending status</td> <td>approve the application as disabled</td> </tr> <tr> <td>granted status</td> <td>reclassify the beneficiary as disabled MN</td> </tr> </tbody> </table>	If the case is in...	This will...	pending status	approve the application as disabled	granted status	reclassify the beneficiary as disabled MN
If the case is in...	This will...						
pending status	approve the application as disabled						
granted status	reclassify the beneficiary as disabled MN						
	NOTE: The effective date will be determined as follows:						
	<table border="1"> <thead> <tr> <th>When the application date falls ...</th> <th>The effective date will be the ...</th> </tr> </thead> <tbody> <tr> <td>prior to the disability onset</td> <td>disability onset date</td> </tr> </tbody> </table>	When the application date falls ...	The effective date will be the ...	prior to the disability onset	disability onset date		
When the application date falls ...	The effective date will be the ...						
prior to the disability onset	disability onset date						

	date	
	after the disability onset date	application date
2	Set a case alert for referral 30 days prior to the re-exam date if one is indicated on form MC 221.	
3	Enter approval information into case comments, including onset and re-exam date.	
4	Clear applicant/beneficiaries information in AuthMED:	
	If ...	Then ...
	active LIHP	discontinue LIHP as outlined in MPG Article A.06.02
	no active LIHP application	no action is necessary
5	Send form 14-10 HNSA to notify the hospital of the Medi-Cal approval if the applicant was certified LIHP/CMS pending the disability evaluation by an HOS worker.	

MPG LTR 773 (12/12)

**D.
DDSD Adopts
SSA
Allowance**

When the applicant has applied for benefits with SSA. SSA evaluates the applicant's disability before they evaluate any other eligibility factors. If the SSI/SSP application is denied because they do not meet federal disability criteria, DDSD will "adopt" the SSA's determination.

DHCS
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tion

If SSA has determined the applicant is not disabled, DDSD will return form MC 221 with an attachment indicating the applicant is not disabled. The form will indicate that SSA has determined the applicant is not disabled. Worker will deny the application following procedures outlined in [MPG 5.4.8b](#).

ACWDL
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If SSA has determined the applicant is disabled, DDSD will return form MC 221 with an attachment indicating the applicant is disabled and will give the onset date. Worker will approve the application following procedures outlined in [MPG 5.4.8c](#).

MEM
Proc
22c-9.2

A disability determination does not mean the applicant is receiving or will receive SSI/SSP benefits. After SSA determines disability, they review other eligibility factors. This review may take several months and the applicant may be determined ineligible to SSI/SSP.

In situations where an applicant/beneficiary is granted SSI/SSP benefits, the worker will clear the INQX screen in MEDS:

If the SSI/SSP effective date...	Then ...
covers all months including retro months requested	deny/discontinue the Medi-Cal case and complete Step 4 of MPG 5.4.8c .
does not cover all the months including retro months requested	grant the Medi-Cal for any months covered by the onset date prior to SSI/SSP eligibility following the procedures outlined in MPG 5.4.8c .

If DDSD decision indicates that DDSD adopted a SSA allowance, and the applicant is not currently receiving SSA Disability benefits, the worker will check MEDS to determine whether the disability continues. When MEDS indicates that the applicant is no longer disabled, the worker will complete form MC 221 and submit to DDSD for a reevaluation. Benefits shall not be discontinued unless a DDSD decision is received indicating that the beneficiary ceases to be disabled.

MPG LTR 773 (12/12)

5.4.12 Receiving and Requesting DDSD Status Information

A. DDSD Reports

The DDSD Quarterly Case Status Reports are used to track and monitor DDSD case actions. This section describes each report and provides instructions for processing.

The DDSD Quarterly Report is available in [SharePoint](#). The reports filter the following information and are described in the following sections:

Subject	Description
State Pending	Number of disability applications pending with DDSD.
State Closed	Number of disability applications closed with DDSD.
CalWIN Pending	Number of DDSD cases pending in CalWIN that are not pending with DDSD.
CalWIN Closed	Number of disability applications pending with DDSD that are closed in CalWIN.
Decisions Imaged	Number of disability decisions imaged in DoReS.
Action Taken	Number of applications with disability decisions received from DDSD and MC Program is approved/denied in CalWIN.
Action Pending	Number of applications with disability decisions

	received from DDSD and MC Program is <u>NOT</u> approved/denied in CalWIN.
No Match	Number of applications pending or closed with DDSD that have no MC application in CalWIN to match the application date.

MPG LTR 773 (12/12)

**B.
Distribution of
DDSD
Quarterly
Reports**

The DDSD Quarterly Case Status Reports are posted in [SharePoint](#) on the following months:

- January
- April
- July
- October

**C.
State Pending
and CalWIN
Pending**

Cases identified in the State Pending list are cases that DDSD has registered as received in their system and continue pending a decision. This section should match the number of cases pending in CalWIN. The CalWIN Pending section lists all cases pending in CalWIN that are not pending with DDSD. Staff must take the following actions on cases listed in the CalWIN Pending Report:

Step	Action						
1	Review case in CalWIN						
	<table border="1"> <thead> <tr> <th>If the applicant is ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>alleging a disability</td> <td>go to Step 2</td> </tr> <tr> <td>not alleging a disability</td> <td>grant/deny case appropriately</td> </tr> </tbody> </table>	If the applicant is ...	Then ...	alleging a disability	go to Step 2	not alleging a disability	grant/deny case appropriately
	If the applicant is ...	Then ...					
alleging a disability	go to Step 2						
not alleging a disability	grant/deny case appropriately						
2	Check Disability windows in CalWIN and DoReS for imaged MC 223						
	<table border="1"> <thead> <tr> <th>If a disability packet ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>was sent to DDSD</td> <td>go to Step 3</td> </tr> <tr> <td>was not sent to DDSD</td> <td>go to Step 4</td> </tr> </tbody> </table>	If a disability packet ...	Then ...	was sent to DDSD	go to Step 3	was not sent to DDSD	go to Step 4
	If a disability packet ...	Then ...					
was sent to DDSD	go to Step 3						
was not sent to DDSD	go to Step 4						
3	<p>Worker must:</p> <ul style="list-style-type: none"> • complete Section 1 on the Additions/Corrections to Pending/ Closed Cases form (found in MPG Appendix B) by putting the incorrect information under DDSD column and correct information under CWD column. • mail form to DDSD 						
4	<p>Worker must:</p> <ul style="list-style-type: none"> • complete the Display Disability/ Medical Conditions Summary screens in CalWIN 						

	<ul style="list-style-type: none"> • enter a case comment • image the MC 223 into case file • forward completed packet to DDSD
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MPG LTR 773 (12/12)

**D.
State Closed
and Decisions
Imaged in
DoReS**

Cases identified in the State Closed list are cases that State DDSD has registered as completed. A decision for these cases should be imaged in DoReS. This section should match the number of Decisions Imaged in DoReS. Staff must take the following action for cases in the State Closed list:

Step	Action						
1	Check DoReS for a disability decision <table border="1" style="margin-left: 20px;"> <thead> <tr> <th style="width: 60%;">If a disability decision is ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>imaged but classified erroneously</td> <td>go to Step 2</td> </tr> <tr> <td>not imaged</td> <td>go to Step 3</td> </tr> </tbody> </table>	If a disability decision is ...	Then ...	imaged but classified erroneously	go to Step 2	not imaged	go to Step 3
If a disability decision is ...	Then ...						
imaged but classified erroneously	go to Step 2						
not imaged	go to Step 3						
2	Request that a supervisor to reclassify the disability decision in DoReS and ensure appropriate case action is taken.						
3	Fax the DDSD Fax Coversheet located in MPG Article B with the following information to DDSD Operations at (213) 480-6421: <ul style="list-style-type: none"> • Applicant's name • Date of birth • Social Security number • Date decision was made by the State DDSD unit 						

MPG LTR 773 (12/12)

**E.
CalWIN
Closed**

Cases identified in the CalWIN Closed list are cases that are closed in CalWIN yet they continue pending with DDSD. Staff must take the following actions on these cases:

Step	Action						
1	Review case in CalWIN <table border="1" style="margin-left: 20px;"> <thead> <tr> <th style="width: 50%;">If the case is ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>appropriately closed</td> <td>go to Step 2</td> </tr> <tr> <td>inappropriately closed</td> <td>go to Step 3</td> </tr> </tbody> </table>	If the case is ...	Then ...	appropriately closed	go to Step 2	inappropriately closed	go to Step 3
If the case is ...	Then ...						
appropriately closed	go to Step 2						
inappropriately closed	go to Step 3						
2	Complete box # 4 on the MC 222 and submit to DDSD to discontinue the disability evaluation.						
3	Take appropriate actions to reinstate the Pending status in CalWIN.						

**F.
Action
Pending**

The Action Pending Report identifies cases pending in CalWIN that have a disability decision capture imaged in DoReS. Workers must review the disability decision and take the following action:

If applicant was determined ...	Then ...
disabled	grant case as outlined in MPG 5.4.8c
not disabled	deny/discontinue as outlined in MPG 5.4.8b

**G.
No Match**

Cases identified in the No Match list are cases that are listed in the State Pending or Closed list that have no Medi-Cal application in CalWIN. Staff must take the following actions on these cases:

Step	Action	
1	Clear applicant's information from the State Closed or Pending Report in CalWIN	
	If determined that an application was ...	Then ...
	not entered in CalWIN in error	go to Step 2
	never accepted	go to Step 3
2	Enter application in CalWIN	
	If the application appeared in the State ...	Then ...
	closed report	grant/deny case
	pending report	continue pending case for DDSD decision
3	Worker must: <ul style="list-style-type: none"> complete Section 1 on the Additions/Corrections to Pending/ Closed Cases form by putting the incorrect information under DDSD column and correct information under CWD column. mail form to DDSD 	