Medi-Cal Program Guide Letter (MPG) #787

May 14, 2013

Subject	**ARTICLE A - CMS IT SYSTEM (AUTHMED) MEMBER INDICATOR ENTRY**
Effective	Upon Receipt
Reference	County Policy
Purpose	To provide staff with instructions for recording or removing a member **Indicator** in the CMS IT System (AuthMed).
Background	IDX comments or alerts are a communication tool designed to assist county staff with the processing of LIHP cases. IDX comment/alert entries are carried forward with each subsequent application until staff updates/removes the comment/alert.

Workers complete the comment section of the CMS-4 for the ASO to record in IDX comments the following:
- Information that alerts staff to exercise caution
- Changes that affect LIHP eligibility

Member comments (referred to now as "Indicators"), are designed to inform staff of the need to act upon reported information received.

Member Alerts are placed by Program/Recovery or the ASO **only** and are designed to inform staff of individuals who are no longer eligible for LIHP or who must comply with a program requirement that affects LIHP eligibility. Only designated Program/Recovery staff have access to add/update Member Alerts. HSS and SHSS staff only have viewing access to Member Alerts placed by Program/Recovery staff or the ASO.

MPG Letter #770 issued January 2, 2013, informed staff that IDX historical comments/alerts have been added to AuthMed and can now be found on the Main Page under the **Member Alerts** tab.

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Highlighted Changes

Indicator types have been added to AuthMed and can be found on the Main Page under the **Indicators** tab. Once the Indicator selection is saved by county staff, it will record on the Main Page, as outlined in How To #1002. SHSS, HSS and Program/Recovery staff will have access to select or remove the appropriate Indicator.

Recording an Indicator
County staff can now select the appropriate member Indicator in AuthMed when:
- Reported information advises staff to exercise caution
- Reported information affects LIHP eligibility
- Referral is made to another resource (SSI Advocate, MASU, etc.)

Removing an Indicator
County staff can remove a selected Indicator in AuthMed when **all** issues in question are resolved, as outlined in How To #1002.

Required Action

When an Indicator needs to be recorded or removed in AuthMed, the worker will:
- Get supervisor approval, if appropriate;
- Click on the Main Page **Indicators** tab; and
- Select or remove the appropriate Indicator, as outlined in How To #1002.

IMPORTANT REMINDER: *Prior to the issuance* of LIHP benefits, the worker must look for any Indicators **and** Member Alerts that have been recorded in AuthMed and take the appropriate action to clear **all** Indicators **and** Member Alerts*.*

Automation Impact

Indicators
AuthMed has been enhanced to:
- Contain a list of member Indicator types
- Record or remove the selected member Indicator

Member Alerts
AuthMed has been enhanced to contain:
- New/updated Member Alert types
- Historical IDX comments/alerts

Forms Impact

No impact.

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ACCESS Impact

ACCESS agents need to familiarize themselves with the instructions outlined in the How To #1002 for viewing Indicators and Member Alerts in AuthMed when taking calls from LIHP applicants.

Imaging Impact

No impact.

PA (CalFresh or CalWORKs) Program Impact

No impact.

Quality Control (QC) Impact

Effective with the June 2013 review month, QC 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 A, Section 2.01	• Updated the Processing Guide Table • Updated the AuthMed Notification Information
Article A, Section 7.01	• Updated the Table of Contents • Updated the Processing Guide Table • Added Indicator and Alert Information
Article A, Section 7.02	• Updated the Table of Contents • Updated the IDX recording of comment/alert entries information • Renumbered Section • Moved Sections A.07.02.D & A.07.02E to Section A.07.03, A.07.04
Article A, Section 7.03	• Added new Section • Added Indicator information • Updated the indicator recording process
Article A, Section 7.04	• Added new Section • Updated Hyperlinks

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Approval for Release

Robert Wham, Asg. Director 5-17-13

CG/JP

Article A Section 02.01 Eligibility

RESOURCES	TITLE
How To's	• #432 Process LIHP in CalWIN for New Applicants • #1000 How to Register an Application in AuthMed • #1001 LIHP Simplified LIHP Application (SLA) • #1002 Select/Remove/View Indicators and View Member Alerts in AuthMed

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A.02.01 Eligibility

A.02.01I Notification

Worker Notification

Workers select the appropriate Indicator in AuthMed, as outlined in How To #1002, to record information that:
- Advises staff to exercise caution;
- Needs an explanation/clarification; or
- Affects eligibility.

ASO Notification

The CMS IT System will upload to the ASO at the end of the business day, notifying the IDX System when LIHP eligibility is approved or denied.

Applicant Notification

AuthMed will generate and mail to the applicant the appropriate NOA when denying, certifying, recertifying or discontinuing LIHP eligibility. Exceptions to the automatic mailing are listed in A.07.01.

Provider Notification

LIHP contracted providers are able to view the status of an applicant's/enrollee's eligibility using the CMS IT Systems Provider Online Verification (POV) site (https://www.sdcmspov.com).

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Article A Section 07.01 CMS Information Technology (IT) System (AuthMed)

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Resources

RESOURCES	TITLE
How To's	• #1001 Simplified LIHP Application (SLA) • #1002 Select/Remove/View Indicators and View Member Alerts in AuthMed

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A.07.01 CMS IT System (AuthMed)

A.07.01H Indicators and Member Alerts

Indicators

Indicators are designed to inform staff of the need to act upon applicant/enrollee information received. SHSS, HSS and Program/Recovery staff will have access to select or remove the appropriate Indicator.

A list of Indicator types can be found on the Main Page under the **Indicators** tab. Once the Indicator selection is saved by county staff, it will record on the Main Page, as outlined in How To #1002.

Indicators have been added to AuthMed to record information that:

- Advises staff to exercise caution;
- Needs an explanation/clarification; or
- Affects eligibility

Member Alerts
Member Alerts are placed by Program/Recovery or the ASO <u>only</u> and are designed to inform staff of individuals who are no longer eligible for LIHP or who must comply with a program requirement that affects LIHP eligibility. Eligibility staff will **only** have viewing access to alerts placed by Program/Recovery staff or the ASO.

Historical IDX member comments/alerts and new Member Alerts have been added to AuthMed and can now be found on the Main Page under the **Member Alerts** tab (Refer to Appendix A).

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A.07.02 IDX System

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A.07.02 IDX System

**A.07.02A
General**

Recording of case activity, including some of the different types of comments/alert entries and status codes entered on the IDX system to assist staff with the processing of LIHP cases (Refer to Appendix A). These historical IDX comments and alerts have been added and can now be found on the Main Page of the CMS IT System (AuthMed) under the **Member Alerts** tab (Refer to Appendix 07.01A).

Prior to issuing benefits, the worker shall:
- Check for these alerts and entries entered in the **Member Alerts** tab in AuthMed; and
- Document action taken in case comments.

A.07.02B Recording of Case Activity	**Disposition**

Disposition

The disposition of every LIHP application and recertification is automatically communicated from AuthMed to IDX each night.

IDX Comment/Alert Entries

Historical IDX member comments/alerts and new Member Alerts have been added to AuthMed and can now be found on the Main Page under the **Member Alerts** tab (Refer to Appendix 07.01A).

Article A Section 07.03 Indicator Process

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A.07.03 Indicator Process

A.07.03A General

Indicators are designed to inform staff of the need to act upon reported information received for the applicant/enrollee. SHSS, HSS and Program/Recovery staff will have access to select/remove the appropriate Indicator.

Indicators have been added to AuthMed to record information that:
- Advises staff to exercise caution;
- Needs an explanation/clarification; or

- Affects eligibility

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A.07.03B Exercise Caution Indicator

Hostile, Threatening or Abusive Applicant/Enrollee Indicator

This Indicator is designed to inform staff that have face-to-face contact with an applicant/enrollee to exercise caution. The Indicator may be initiated by either ASO or County staff, and is reviewed at each new application. The information contained in the Indicator is for LIHP staff only, and is **not** to be shared with the applicant/enrollee.

Criteria
This Indicator includes, but is not limited to, the following situations:
- Applicant/enrollee identified as a drug seeker.
- Applicant/enrollee made threats directed at clinic, County, or ASO staff.
- Applicant/enrollee was verbally abusive and/or disruptive at a clinic or worker office operations.

A new Indicator is created for each subsequent County or ASO referral.

Referral Procedure
When the applicant/enrollee meets this Indicator criteria:
- The worker emails their supervisor explaining the situation. The email must contain the applicant's/enrollee's name, SSN, and the clinic or office which the incident occurred.
- The supervisor will either place or advise the worker whether to place or not to place the Indicator in AuthMed.
- The worker scans a copy of the email with the supervisor's response in the case record.

The above procedure is followed **each** time the need for a subsequent Indicator is identified.

Mandatory Supervisor Reviews
The supervisor reviews all Indicator referrals to ensure that it is an appropriate referral. The supervisor will either place or advise the worker whether to place or not to place the Indicator in AuthMed.

Status Review
The worker will review the Indicator at each new application. To remove the Indicator, the worker will:
- Email their supervisor requesting the supervisor to remove the Indicator or approval to remove the Indicator.

- Scan a copy of the email response in the case record.
- Remove the Indicator if the request to remove the indicator was approved by the supervisor.

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A.07.03C Explanation/ Clarification Needed Indicator

This Indicator in AuthMed is designed to inform staff to act upon applicant/enrollee information that needs explanation/clarification. (Example: "Returned Mail w/o forwarding address").

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A.07.03D Affects Eligibility Indicator

This Indicator in AuthMed is designed to inform staff of individuals who may not be eligible for LIHP. (Example: "Referred to LIHP PAFD Investigator").

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A.07.04 Program/Recovery Member Alert Process

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Resolving Member Alerts at Recertification	A.07.04C
Resolving Member Alerts at Reapplication	A.07.04D

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A.07.04 Program/Recovery Member Alert Process

A.07.04A General

LIHP Recovery/Program staff member use these alerts to identify applicants/enrollees who are no longer eligible to be certified/recertified for LIHP or if there are issues the applicant/enrollee must resolve. Only designated Program/Recovery staff have access to add/update Member Alerts. HSS and SHSS staff will **only** have viewing access to alerts placed by Program/Recovery staff or the ASO.

Note: Historical IDX "DNR" Member Alerts will remain in the historical alert section in AuthMed

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A.07.04B Member Alert Types

"Do Not Recert" (DNR) Alert

This Member Alert is used when an applicant/enrollee is determined **not** eligible for LIHP or the applicant/enrollee must comply with a program requirement. The DNR alert includes the reason, date and Program/Recovery staff member who placed the alert.

"Call Before Recert" Alert

This Member Alert is used when there is a need for the applicant/enrollee to resolve certain issues. The alert includes the reason, date and Program staff member who is to be contacted.

Below are some examples when these alerts are used:

Fraud
When the enrollee does not cooperate with the investigation into allegations of fraud.

Overpayment Collections
When the enrollee does not cooperate in reimbursing LIHP for overpayment of benefits.

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A.07.04C Resolving Member Alerts at Recertification

Workers must take the following steps when the case has a "DNR" Member Alert and the enrollee has submitted a **recertification** application:

Step	Action
1	Start the recertification process (Refer to A.03.02).
2	Contact LIHP Program/HCPA Recovery staff member via email for instructions on what actions the enrollee must take to clear the alert.
3	Ensure that all issues are resolved and documented before changing the status of the LIHP recertification to LIHP APPROVED (Refer to Appendix 03.02A).
4	After the issues have been resolved, contact the Recovery/Program staff member to update the DNR Member Alert.

Note: Historical "DNR" Member Alerts will remain in the historical alert section in AuthMed.

A.07.04D Resolving Member Alerts at Reapplication

Workers must take the following steps when the case has a "DNR" Member Alert at **reapplication**:

Step	Action
1	Do **not** certify an applicant when a "DNR" Member Alert is present without first contacting Program/HCPA Recovery staff member via email for instructions on what actions the applicant must take ***before the issuance of benefits.***
2	Confirm with LIHP Program/Recovery staff member that **all** issues have been resolved and for staff member to update the DNR Member Alert ***before the issuance of benefits***.
3	Document action taken in case comments.

Note: Historical "DNR" alerts/comments will remain in the historical alert section in AuthMed.