

Article 9 Section 02 IDX System

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CMSPG LTR 25 (05/13)

09.02.01 IDX System

09.02.01A General

Recording of case activity, including some of the different types of comments/alert entries and status codes entered on the IDX system, assist staff with the processing of CMS cases (Refer to Appendix A). These historical IDX comments/alerts have been added and are now found on the Main Page of the CMS IT System (AuthMed) under the **Member Alerts** tab (Refer to Appendix 09.01B).

Prior to issuing benefits, the worker shall:

- Check for these alerts and entries entered in the **Member Alerts** tab in AuthMed; and
- Document the action taken in case comments.

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09.02.01B Case Activity Recording

Disposition

The disposition of every CMS 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 09.01B).

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09.02.01C Medi-Cal Status Codes

IDX status codes are used to track the progress of Medi-Cal referrals and applications. When beneficiaries are approved Medi-Cal

retroactively, CMS bills Medi-Cal for reimbursement, and notifies the hospitals and clinics that they need to bill Medi-Cal for services rendered.

Medi-Cal Pending (A-P)

This status code identifies beneficiaries who have applied for Medi-Cal and have a case pending in CalWIN, or when beneficiaries have an SSI application or SSI appeal pending. The worker writes the Medi-Cal application date, or the SSI application/filing date and level of the SSI appeal in case comments. When the beneficiary has a record on MEDS, the SSI appeal information is on the MEDS QP screen. Workers must document that they asked the beneficiary for an updated status of their Medi-Cal, Social Security application or appeal at every interview. If there is a change, an entry must be made in the case comments.

If the beneficiary is approved for Medi-Cal, Social Security disability benefits or SSI, the worker must immediately forward this information to CMS Recovery by e-mail or fax. If an award letter is available, a copy of the letter should be attached to the email or fax. If the award letter is not available, the worker must ask the beneficiary to provide a copy of the award letter to forward to CMS Recovery when received.

NOTE: Workers must **not** approve CMS benefits for a beneficiary that has been determined disabled who has a pending:

- Medi-Cal case;
- SSI/Social Security Disability application; or
- SSA appeal at the Hearing level.

Medi-Cal Approved (N-A)

This status code identifies beneficiaries whose Medi-Cal eligibility has been **verified** on MEDS.

09.02.01D “CHRONIC” Indicator

The ASO has the responsibility of entering a “CHRONIC” indicator on the IDX Eligibility Enrollment Summary Screen for CMS beneficiaries whose chronic medical condition has been identified and verified by claims data in IDX.

Before recertifying a CMS case, eligibility staff must check the IDX Eligibility Enrollment Summary Screen for the “CHRONIC” indicator. CMS beneficiaries who have the “Chronic” indicator on the IDX Eligibility Enrollment Summary Screen are to be recertified for twelve months, if all program requirements are met. Refer to 08.03 for recertification instructions for chronics.