SDX TRAINING PACKAGE

The training package contains general information on SSI Medicaid, how to use the online SDX data, troubleshooting tips for SSI Medicaid cases, and procedures to follow when an SSI Medicaid recipient does not receive the Medicaid card.

The training package does not replace the EIS Manual or Medicaid Eligibility Policy manuals. It is intended to supplement the material in the manuals.

Published August 2004
Last Change August, 2005
Recipient and Provider Services
Eligibility Information System Unit

SDX TRAINING PACKAGE

August 2005

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SSI Medicaid Eligibility Policy MA-1000

SSI Medicaid Eligibility Information Systems Instructions EIS 4200

I.   **WHAT IS SSI?**

SSI (Supplemental Security Income) is a disability program
administered by the Social Security Administration (SSA).

When an individual applies for SSI benefits, SSA enters data into
their automated system. Each night, after SSA processes changes in
their automated system, the state receives an automated copy of the
changes. The state uses the automated copy of SSI data to do two
things:

♦ Update the online State Data Exchange (SDX).

♦ Approve and/or update SSI Medicaid in the Eligibility Information
   System (EIS).

The online SDX displays data for pending SSI applications,
approved/denied applications, active and terminated SSI cases.

II. **WHAT IS THE SDX?**

The SDX is the state's online display of formatted SSI data. The
SDX screens are different from the screens Social Security employees
see.

• Field names on the SDX may be different than what SSA sees on
   their system.

• The data may be different than what SSA sees because EIS has
   converted the data for the SDX.

III. **HOW IS THE SDX UPDATED?**

A.   Social Security enters updates to their automated system.

B.   SSA processes these updates and sends an automated copy of the
     data to the State.

C.   The State receives and processes SSA's automated updates.

D.   The State updates the on-line SDX nightly from each automated
     file received from SSA. SDX sheets are created for newly
     approved SSI recipients and when certain information changes
     for an individual.

E.   When the state receives an updated SDX record for an
     individual, the new SDX record overlays the old SDX record
     online. You may press PF9 to view the list of historical SDX
     records that have been received. Refer to EIS 1105 for
     complete instructions to access and view the historical SDX
     records.

IV. **HOW DOES EIS USE SDX DATA?**

    A. EIS uses data from the SDX to process and update SSI Medicaid automatically. **Social Security does not key any data in EIS.**

    B. EIS approves, changes, and terminates SSI Medicaid benefits and issues automated notices for anyone who is considered SSI eligible by SSA. EIS also issues SSI Medicaid denial notices for individuals denied SSI.

V. **HOW DOES EIS ASSIGN AN INDIVIDUAL ID FOR AN SSI RECIPIENT?**

EIS uses the Social Security Number (SSN) from the SDX, full first name, full last name, date of birth and sex to determine whether the individual is already in the Common Name Data Service (CNDS) or on a pending application (AD) in EIS. The purpose for matching is to prevent duplicate EIS Individual IDs and duplicate benefits by ensuring an individual has only one Individual ID in EIS. EIS matches the SSN first between the SDX and CNDS, before matching the other data.

    A. SSN not in CNDS

        When the SSN is not in CNDS, EIS assigns an individual id and processes the SDX record. If an individual is in EIS with no SSN or an incorrect SSN, EIS assigns a new, duplicate individual id and creates a new Medicaid case.

    B. SSN, SDX name and sex match only one id in CNDS

        When the SDX name sex and SSN exactly match only one individual id in CNDS, EIS processes the SDX record.

    C. SSN, SDX name and sex do not match only one id in CNDS

        When the SDX name, sex and SSN do not exactly match <u>only one individual id</u> in CNDS, EIS creates an SDX Exception.

VI. **WHAT HAPPENS IF EIS CREATES AN SDX EXCEPTION?**

A. SDX Update Held for Processing

EIS does not process the SDX update until the county resolves the SDX Exception. Benefits may be delayed or issued incorrectly if the county does not resolve SDX Exceptions promptly.

B. County Resolves SDX Exception

When the county resolves the SDX Exception in EIS, EIS processes the SDX update in that night's processing cycle. (EIS does not hold the SDX update for Friday night.) EIS approves, denies, changes or terminates SSI Medicaid based on information on the SDX.

See EIS 4200, Part Two for more information on SDX Exceptions.

Please call EIS at DMA if you have questions about resolving SDX Exceptions.

C. Which Automated Systems Are Affected by Changing Data via the SDX Exception Process?

When you resolve an SDX Exception, if the EIS Individual's SSN, name, race and/or sex change in CNDS, all the following systems update automatically.

- **EIS**-Eligibility Information System-Medicaid, Work First and Special Assistance eligibility

- **FSIS**-Food Stamp Information System-Food Stamp eligibility

- **ACTS**-Automated Collection Tracking System-Child Support system

- **EPICS**-Enterprise Program Integrity Control System

- **EPIS**-Employment Programs Information System

- **BCBS**-Blue Cross/Blue Shield of North Carolina-Processes North Carolina Health Choice for Children claims

- **MMIS**-Medicaid Management Information System-Processes Medicaid claims

- **DMH**-Division of Mental Health client data

Use data in automated systems and existing county records to determine if the SDX individual is the same as the EIS individual. Before you resolve an exception, be very certain you are resolving it correctly.

VI. C.   **WHAT HAPPENS IF EIS CREATES AN SDX EXCEPTION? (CONT'D)**

> ➤ If it is necessary to change the Social Security number for an EIS individual to resolve an SDX exception, make the change on the SDX Exception Processing screen. Do not use the Name Change function to change the SSN.

> ➤ If the SDX name and EIS name for an individual are not exactly the same, do not use the Name Change function to change the EIS name. EIS changes the name automatically when the SDX update processes, if appropriate.

See EIS 4200, Part Two for more information on SDX Exceptions.

Please call EIS at DMA if you have questions about resolving SDX Exceptions.

VII.   **HOW DOES EIS KNOW SSI MEDICAID SHOULD BE APPROVED?**

EIS uses SDX data to determine eligibility for SSI Medicaid.

The person does not have to be in current pay status to be eligible for SSI Medicaid (1619B eligible, for example).

See EIS 4200, Part Three, Approval, for additional information on SSI Medicaid approval.

VIII. **HOW DOES EIS PROCESS AN SSI MEDICAID APPROVAL?**

EIS creates an SSI Medicaid case for all the months of SSI eligibility. EIS displays the approval date in the ONGOING DISP DT field on the EIS case data screen.

If the case is active SAA or SAD, EIS changes the SSI Indicator on the case to Y.

EIS issues Medicaid cards for all eligible months in the nightly cycle when the SSI Medicaid approval processes. The state mails the Medicaid cards from Raleigh the next state workday.

See EIS 4200, Part Three for more information on how EIS processes SSI Medicaid approvals.

See EIS 4200, Part Five, for information on which data the county controls on an SSI Medicaid case.

IX.   HOW DOES THE COUNTY KNOW SSI MEDICAID IS APPROVED?

A.   SSI Medicaid Created/Modified Report

EIS creates the SSI Medicaid Created/Modified Report daily. The report is available from your computer in XPTR. The XPTR selection name is DHREJ SSI MED CREATED/MODIFIED. Each county is responsible for ensuring there is a plan for reviewing this report on a daily basis.

The SSI Medicaid Created/Modified Report displays the following information for your county:

- SSI Medicaid approvals for new individuals.

- SSI Medicaid approvals for inactive individuals.

- SSI Medicaid approvals for individuals in active cases.

- SSI Medicaid approvals for individuals deleted from active multi-person cases.

- SSI Medicaid cases transferred to your county from another county.

When SSI is approved or an SSI Medicaid case transfers to your county, you may need to take action.

- You may need to review an associated case and determine the effect of the SSI Medicaid eligibility on the associated case.

- The county of residence may be an issue if the case is long term care, CAP/MR, SA, adoption assistance or any other situation where the county of responsibility may not be the same as the county of residence.

See XX. D. Troubleshooting, for instructions to correct the county of responsibility for SSI Individuals.

B.   SSI Individual in EIS Pending Application Report

EIS creates the SSI Individual in EIS Pending Application Report weekly on Friday night. The new report is available from your computer in XPTR every Monday morning. The XPTR selection name is DHREJ SSI IND IN EIS PENDING APP. Each county is responsible for ensuring there is a plan for reviewing this report on a weekly basis.

This report lists all pending applications in EIS that include an individual for whom EIS processed an SDX update. The individual may or may not be approved for SSI. EIS also places the application on hold with HX status. Evaluate the effect of the SDX update on the pending application.

See EIS 4200, Part Eight, Reports, for more information on all the SSI Medicaid reports in XPTR.

X.   HOW DO I KNOW EIS ISSUED A MEDICAID CARD?

The SSI Medicaid Regular Run Register and SSI Medicaid Straggler Run Register are available from your computer in XPTR. The XPTR selection names for these two reports are DHRWDB SSI MED REG RUN and DHREJ SSI MED STRAGGLER RUN. You may need to use both reports to verify EIS issued benefits correctly.

A.   Ongoing SSI Medicaid Cases

Use the SSI Medicaid Regular Run register to verify EIS issued the current month's Medicaid card. The SSI Medicaid Regular Run register is available from your computer in XPTR. See below for an example. EIS creates the SSI Medicaid Regular Run register mid-month for the next calendar month, i.e. mid-June for July. SSI Medicaid Regular Run is 11 workdays from the end of the month.

B.   Approvals

1.   Initial Medicaid Card

EIS issues the initial SSI Medicaid card the same night the SSI Medicaid approval processes in EIS. The state mails the Medicaid card from Raleigh the next workday.

EIS displays the initial Medicaid card on the SSI Medicaid Straggler Register with the same date as the ONGOING DISP DATE on the case.

EXAMPLE:

SSI Medicaid ongoing approval processes in EIS April 16, 2004. SSI Medicaid is approved effective February 1, 2004.

On the night of April 16, 2004, EIS issues a Medicaid card beginning with the Medicaid Effective Date on the case through April 2004. In this example, EIS issues a Medicaid card valid February 1, 2004 through April 30, 2004. The state mails the Medicaid card the next state workday.

The case in this example was approved April 16, 2004, so the initial Medicaid card is on the SSI Medicaid Straggler Register dated April 16, 2004.

X. B. HOW DO I KNOW EIS ISSUED A MEDICAID CARD?-APPROVALS (CONT'D)

    2.   Next Month's Medicaid Card

EIS issues the next month's Medicaid card based on when the approval processes relative to SSI Medicaid Regular Run (11th state worknight from the end of the month).

    a.   SSI Medicaid approval processes in EIS on or before SSI Medicaid Regular Run.

EIS issues the next calendar month's card in regular run. The state mails the next month's Medicaid card the last workday in the current month.

EXAMPLE:

SSI Medicaid ongoing approval processes in EIS March 12, 2004. This is BEFORE SSI Medicaid Regular Run for April 2004.

EIS issues the Medicaid card for the next calendar month (April) in SSI Medicaid Regular Run. The state mails the next month's Medicaid card (April) the last workday in the current month (March).

    b.   SSI Medicaid approval processes in EIS after SSI Medicaid Regular Run.

EIS issues the Medicaid card for the next calendar month in Big Straggler, which is the first worknight of the next calendar month. The next month's Medicaid card displays on the SSI Medicaid Straggler Register with the earliest date in the month.

EXAMPLE:

SSI Medicaid ongoing approval processes in EIS March 26, 2004. This is AFTER SSI Medicaid Regular Run for April 2004.

EIS issues the Medicaid card for the next calendar month (April) the first state worknight in April. The state mails the next month's Medicaid card (April) the next state workday. The next month's Medicaid card displays on the SSI Medicaid Straggler Register with the earliest date in the month.

XI.   MEDICAID CARD REGISTERS IN XPTR

A.   SSI Medicaid Regular Run Register

EIS displays all cards from the SSI Medicaid Regular Run on the SSI Medicaid Regular Run Register. February Medicaid cards display on the register with a January run date, March Medicaid cards display on the register with a February run date, etc.

In the sample, below, the run date on the report is 3-17-04 and the benefit month (BENF MONTH) is 04-04.

```
J 1 B02:DHRWDB SSI MED REG RUN   03/17/2004             Index is DISTIX01
Command ===>                                            Scroll ==> CSR
EJA524-1                  NC DEPARTMENT OF HUMAN RESOURCES        PAGE   1
RUN DATE: 03/17/2004   ELIGIBILITY INFORMATION SYSTEM
RUN TIME: 22:27:39     SSI/MEDICAID ID REGULAR RUN REGISTER
                       COUNTY 00

   LAST             FIRST      MI   BENF      PROG      CASE
   NAME             NAME            MONTH               ID

ACUFF            ROY         M   04-04     MAD       11111111

ADKINS           DIET        J   04-04     MAD       22222222

ADKINS           SUSIE           04-04     MAA       33333333
```

XI.   MEDICAID CARD REGISTERS IN XPTR (CONT'D)

   B.   SSI Medicaid Straggler Register

      The SSI Medicaid Straggler Register displays all SSI Medicaid
      cards issued in the nightly batch process for approvals.

      XPTR contains the last 25 days' SSI Medicaid Straggler
      registers (referred to as 'versions'). Please see EIS 1061
      for instructions to view different versions of a report.

      Note below, the run date on the register is 04/05/2004, but
      the Benefit Month (BENF MONTH) can be any month, depending on
      when the recipient is eligible.

```
J 1 B02: DHREJ SSI MED STRAGGLER  04/05/2004              Index is DISTIX01
Command ===>                                              Scroll ==> CSR
EJA524-1                  NC DEPARTMENT OF HUMAN RESOURCES         PAGE   1
RUN DATE: 04/05/2004   ELIGIBILITY INFORMATION SYSTEM
RUN TIME: 23:46:59       SSI/MEDICAID ID STRAGGLER REGISTER
                            COUNTY 00

   LAST              FIRST        MI    BENF      PROG       CASE
   NAME              NAME               MONTH                ID

ARMSTRONG           KATHY         E     10-03     MAD        22222220
ARMSTRONG           KATHY         E     02-02     MAD        22222220
ARMSTRONG           KATHY         E     01-04     MAD        22222220

BAKER               GINGER        T     09-00     MAD        44444441

GRIFFITH            ANDY                01-03     MAA        88888889

HYDE                EDWARD              12-03     MAD        33333353
```

      See EIS 4200, Part Eight, Reports, for more information on the
      SSI Medicaid Regular Run Register and SSI Medicaid Straggler
      Run Register.

XII. WHAT HAPPENS WHEN SSI ELIGIBILITY ENDS?

When SSI eligibility ends, SSA updates the SSI record to indicate the individual is no longer eligible for SSI. The state updates the online SDX and EIS processes the SDX update against the SSI Medicaid case.

A.   If eligibility ends due to death of the recipient, EIS closes the SSI Medicaid case.

If the case is SAA or SAD, EIS changes the SSI Indicator to N and issues an SDX Update Sheet.

B.   If an SSI recipient moves out of North Carolina, EIS closes the SSI Medicaid case. The SSI does not usually end, but the Medicaid case is not transferred to the new state.

If the case is SAA or SAD, EIS changes the SSI Indicator to N and issues an SDX Update Sheet.

C.   If an SSI recipient loses SSI eligibility for any reason other than death or moving out of state, EIS puts the SSI Medicaid case in ex parte status to allow the county to complete an ex parte review to evaluate continued Medicaid eligibility. The case remains open and the individual continues to receive Medicaid while the county completes the ex parte review. The county must complete the review within four months of the month the case goes to ex parte status.

If the case is SAA or SAD, EIS changes the SSI Indicator to N and issues an SDX Update Sheet.

XIII. HOW DOES THE COUNTY KNOW SSI MEDICAID ELIGIBILITY ENDED?

A.   SSI Termination Report

EIS generates the SSI Termination Report each Friday. The report is available from your computer in XPTR. The XPTR selection name is DHREJ SSI TERMINATION RPT.

Each county is responsible for ensuring there is a plan for reviewing this report on a weekly basis.

XIII. A (CONT'D)

```
J 1 B02:DHREJ SSI TERMINATION RP 04/02/2004   Pg        8 of      538 Line    1
Command ===>                                              Scroll ==> CSR
RUN DATE:  04/02/2004       SSI TERMINATION REPORT                    PAGE   8
PROGRAM    EJA623                  COUNTY 01                          EJA623R1
                             DISTRICT SDX


 POST   CASE HEAD NAME      CASE   WRK PGM   SSN      TYPE       DOB    DTE OF
 DATE                        ID    NBR CAT            ACTION            ACTION

040204  C C RYDER          11111111 000 MAD 111111111 DECEASED   09141989 040204

040204  I B GONE           22222222 000 MAD 222222222 OUT OF STAT 03291990 040204

031204  G W GREEN          33333333 000 MAD 333333333 SSI TERM   10281945

030504  J L BLACK          44444444 000 MAD 444444444 SSI REAPPV 03231950 040204
```

B.   The SSI Termination Report displays the following information for your county:

      1.   SSI Medicaid cases closed due to death of the recipient.

      2.   SSI Medicaid cases closed due to the recipient moving out of North Carolina.

      3.   SSI Medicaid cases that are currently in ex parte status.

      4.   SSI Medicaid cases that were in ex parte status but are now reapproved for SSI.

      See EIS 4200, Part Eight, Reports, for more information on the SSI Termination Report.

XIV. **WHAT HAPPENS IF A PERSON IN EX PARTE STATUS IS REAPPROVED FOR SSI?**

      A.   EIS processes a reapproval of SSI the same as any other SSI approval. See "How does EIS process an SSI Medicaid approval?" above.

      B.   The SSI Termination Report displays a message, SSI REAPPV.

      C.   The SSI Medicaid Created/Modified Report displays the individual/case also.

XV.   **STATE ONLINE QUERY**

      The State Online Query, SOLQ, is the state's online display of queries to Social Security's BENDEX and SDX records. SOLQ is an excellent resource for information on an individual who is new to North Carolina and not on the online SDX or BENDEX yet.

      If SOLQ data indicates an individual is an SSI recipient living in NC and the individual is not on the online SDX, call EIS at DMA to report the problem.

      See EIS 1107 for codes and more information.

XVI.   COMMON ADDRESS PROBLEMS

    A.   Special Addressing Software

    EIS uses special software for printing all Medicaid cards and recipient notices. The purpose of the special software is to speed delivery by ensuring mailing addresses meet USPS standards. The software checks the address on the EIS case and attempts to match it to all the addresses in the United States Postal System database.

    If the exact address is not found, the software may change the address on the Medicaid card to match the address in the USPS database that is most likely to be the correct address. The EIS case address does not change, only the printed address on the Medicaid card.

    If you discover this situation, call EIS at DMA. We will work with you to resolve the problem.

    Example:

EIS case address is:	Medicaid card address is:
123 Billy Rd Raleigh NC 27609	123 Bunny Rd Raleigh NC 27609

EIS case address is:	Medicaid card address is:
Star Route Box 38 Jonesboro NC 27666	P O Box 38 Jonesboro NC 27666

EIS case address is:	Medicaid card address is:
1215 Blue Ridge Church Rd Asheville NC 26500	1215 Blue Ridge Dr Church Rd Asheville NC 26500

XVI. A.   COMMON ADDRESS PROBLEMS (CONT'D)

When the client states they have never lived at the address on the Medicaid card, i.e. this is not an old address for the client, this is an indication the EIS case address is not in the USPS database as a valid address. Call EIS at DMA. **DO NOT CALL SOCIAL SECURITY WITH THIS TYPE OF PROBLEM (when client states he has never lived at this address).**

B.   Other Common Address Problems

1.   Address is correct on SDX but EIS seems to have a partial address. (address is too long on SDX)

```
VSD901-1       NC DEPT OF HEALTH AND HUMAN SERVICES    TODAY'S DATE: 04/06/2004
                     SDX   INFORMATION                 PROCESS DATE: 04/01/2004

RECIPIENT:  FRANK        FRED  O        SSN: 123-45-6789
CUR REC IND:   1
OTHER NAME:                     RSDI CLAIM NO:       0
SSN CORR IND:                   COUNTY:      49 - IREDELL
RACE:          U                RESIDENCY: 10/01/2003
SEX:           M                TELEPHONE: 704-999-9999
BIRTH DATE:    07/08/1989       RECIPIENT: FRED       O FRANK
DEATH DATE:                     MAIL ADDR: 4235 FRANKLIN DR APT 304
DEATH SRC CD:  0                           CHINA GROVE           NC
RECIPIENT TYP: DC                          22222-2222
MARITAL STAT:  3
HEAD OF HOUSE: N
STUDENT IND:   N
PAYEE CODE:    MTH              RESIDENCE: 4235 FRANKLIN DR APT 304
CUSTODY CODE:  PYE                         CHINA GROVE           NC
COMPETENCY CD: B                           22222




PF1/13=NEXT   PF2/14=PREV   PF3/15=MENU   PF8/20=BENDEX
PAGE: 1   NEXT SELECTION:                      KEYS:
```

```
CASE-ID 99999999  CREATED 2000326   LAST-CHG  2000326   FORM-ID 8501103B
CO 92 CO-CASE   333333 DIST SDX CO-REASSIGN  0   000000 TERM    00000000
CASEHEAD/PAYEE FRED    O FRANK               ID 999999999L PH#
ADDRESS LINE 1 4235 FRANKLIN DR A         ADDRESS LINE 2
CITY CHINA GROVE   STATE NC ZIPCODE 22222 WORKER-NO 000 NEEDS UNIT
```

EIS address is 4235 FRANKLIN DR A
          CHINA GROVE NC 22222-2222

Send a DMA-5049 to Social Security. Say "Please change the format of this mailing address."

Apt 304
4235 Franklin Dr
China Grove NC 28023

XVI. B.   COMMON ADDRESS PROBLEMS

2.   Apartment number on line 2-Need the street address on line 2 if the whole address does not fit on one line (18 characters).

3.   Invalid abbreviations of street names

4.   Space between the street number and apartment number (4234 A Franklin Dr)

5.   The residence address is correct, but the mailing address is still the old address.

Send a DMA-5049 to SSA: "Please change the <u>format</u> of the mailing address." Write the address on the DMA-5049 exactly as you want it entered on the SDX.

See Dear County Director of Social Services letter dated May 11, 2001 for more information on addresses for SSI Medicaid recipients. Also see EIS 4050, Mailing Address Appendix.

C.   Payee Mailing Address

When the SSI recipient has a representative payee, EIS uses the payee's mailing address as the EIS case mailing address.

When there is a code in the PAYEE CODE field on page 1 of the SDX, the SSI recipient has a payee. See page 4 of the SDX for the payee's mailing address.

```
VSD901-1      NC DEPT OF HEALTH AND HUMAN SERVICES    TODAY'S DATE: 04/02/2004
                    SDX  INFORMATION              PROCESS DATE: 02/23/2004


RECIPIENT:  FRANK            FRED     O     SSN: 123-45-6789


OTHER NAME:    FRANK             RSDI CLAIM NO: 123456789A
SSN CORR IND:                    COUNTY:    92   WAKE
RACE:         W                  RESIDENCY: 03/01/1999
SEX:          M                  TELEPHONE: 919-857-4019
BIRTH DATE:   06/10/1960    RECIPIENT: FRED O FRANK
DEATH DATE:                 MAIL ADDR: 123 JONES ST
RECIPIENT TYP: DI                CHINA GROVE           NC
MARITAL STAT:  3                 22222-2222
HEAD OF HOUSE: N
STUDENT IND:   N
PAYEE CODE:    MTH          RESIDENCE: 123 JONES ST
CUSTODY CODE:  PYE               CHINA GROVE      NC
COMPETENCY CD:                   22222




PF1/13=NEXT    PF2/14=PREV    PF3/15=MENU    PF8/20=BENDEX
PAGE: 1   NEXT SELECTION:                         KEYS:
```

```
VSD901-4        NC DEPT OF HEALTH AND HUMAN SERVICES   TODAY'S DATE:  04/02/2004
                        SDX   INFORMATION              PROCESS DATE: 02/23/2004

RECIPIENT:  FRANK            FRED    O    SSN: 123-45-6789


--------------------  UNEARNED INCOME INFORMATION  --------------------
TYPE    START       STOP      AMOUNT   FREQUENCY  CLAIM ID      VERIFICATION
   A    05/1997   06/1997                 T        123456789A        1
   J    10/1998   10/1998    164.66       N                          7
   H    09/1998   09/1998    184.66       N        AN02 TO B         0




   REP PAYEE/AGENCY:   WANDA    S FRANK IN TRUST FOR
           ADDRESS:   4235 FRANKLIN ST APT 304




                   CHINA GROVE            NC 22222 2222


PF1/13=NEXT    PF2/14=PREV    PF3/15=MENU    PF8/20=BENDEX
PAGE: 4    NEXT SELECTION:                        KEYS:
```

If there are issues with the format of the payee's mailing address, send a DMA-5049 to Social Security. "Please change the format of the payee's mailing address." Write the address on the DMA-5049 exactly as you want it entered on the SDX.

XVII.   **HOW DOES EIS PROCESS AN ADDRESS CHANGE FOR SSI MEDICAID? HOW IS THE MEDICAID CARD AFFECTED?**

When an SSI Medicaid recipient calls dss to report a change of mailing address, instruct the recipient to report the change of mailing address to the local Social Security office. The recipient should ask SSA to change the mailing address on the SSI record. (Tell the recipient NOT to mention Medicaid. If the recipient says he wants his Medicaid address changed, Social Security may not understand the recipient really needs the SSI address changed). When the address changes on the SSI record, EIS changes the address on the MAABD Medicaid case automatically for private living arrangements. Report the address change to any other affected areas of your agency, such as food stamps, Work First, other Medicaid, etc.

SSI Regular Run for Medicaid cards is the 11th state worknight from the end of the month. EIS must process the changed address no later than the Friday before SSI Regular Run to ensure the next month's Medicaid card has the correct mailing address.

Example:

In this example, the 11th state worknight from the end of the month is the 17th. EIS must process a change of address on an SSI Medicaid case no later than Friday, the 12th, for the address to be correct on the next month's Medicaid card. Social Security must process the

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changed address on the SSI record no later than Thursday, the 11th, in order to allow time for the change to process in EIS.

Sun	Mon	Tues	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	**17 SSI regular run (11th state worknight from end of month)**	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

➢ The state office does not pull <u>any</u> Medicaid cards when an address changes (regular Medicaid or SSI Medicaid). If the correct address is not on the Medicaid card by the appropriate regular run, the address printed on the Medicaid card will be incorrect.

XVIII.   WHAT TO DO WHEN A RECIPIENT REPORTS HE DID NOT GET THE
            MEDICAID CARD

When a client reports non-receipt of a Medicaid card, the county is
responsible for determining whether a card was mailed, issuing a
replacement card and assisting the client with emergency needs, as
usual.

**DO NOT REFER CLIENTS TO THE STATE CARE-LINE, Information and
Referral Service, (1-800-662-7030) WITH QUESTIONS ABOUT THEIR
MEDICAID CARDS.**

**If you need help determining why the client did not get the Medicaid
card, call EIS at DMA. Their contact number is located in EIS 1200.**

When Medicaid cards are returned to the agency, check EIS to
determine whether there is a new address on the case.

♦ If there is a new address on the EIS case, mail the Medicaid card
   to the new address.

♦ If the address on the Medicaid card matches the address on the
   EIS case, check the SDX address.

   If the EIS address matches the SDX address, hold the card. If
   the client reports non-receipt of the Medicaid card, mail or hand
   the card to the recipient. Refer the recipient to SSA to report
   the new mailing address.

   If the EIS address does not match the SDX address, mail the card
   to the SDX address. If there is a representative payee on the
   SDX, mail the card to the payee's mailing address.

♦ If the address on the Medicaid card does not match EIS and this
   is not a new address, see XVII. Common Address Problems.

A.   Determine why the client did not get the Medicaid card.

       1.   Has the card been returned to the agency?

              a.   Yes-Mail or hand the card to the recipient.

              b.   No-Continue.

       2.   Did EIS issue the card?

              Check the appropriate SSI Medicaid card register in
              XPTR. Refer to XI. above on the SSI Medicaid
              Regular/Straggler Run Registers.

              a.   No-Issue the client a Medicaid card for the
                     current month, including the pharmacy stub. Call
                     EIS at DMA to report the problem.

              b.   Yes-Continue.

XVIII. A.   CLIENT DID NOT GET THE MEDICAID CARD (CONT'D)

    3.   Is the address on the EIS case correct? (Check the format of the address also.)

        a.   Yes, the address on the EIS case is correct.

            Is the address a new address for the client?

            (1)   Yes-This is a new address.

                    What is the last change date on the EIS case? (See top line of EIS Current Case Data screen.) If it is after SSI Medicaid Regular Run, the Medicaid card was probably printed with the old address on it.

                    Replace the Medicaid card. See MA 2380 III.E. or F&C 3505 III. E. for policy and instructions.

                    Provide emergency help for prescriptions, refer to other agencies, call pharmacies and other providers, as needed, just as you would for other Medicaid recipients.

            (2)   No-This is not a new address.

                    Replace the Medicaid card. See MA 2380 III.E. or F&C 3505 III. E. for policy and instructions.

                    Provide emergency help for prescriptions, refer to other agencies, call pharmacies and other providers, as needed, just as you would for other Medicaid recipients.

        b.   No, the address on the EIS case is incorrect.

            (1)   Replace the Medicaid card. See MA 2380 III.E. or F&C 3505 III. E. for policy and instructions.

                    Provide emergency help for prescriptions, refer to other agencies, call pharmacies and other providers, as needed, just as you would for other Medicaid recipients.

(2)   Determine why the address on the EIS case is incorrect.

Is the SDX address correct?

(a)   Yes-SDX address is correct.

See XX. Troubleshooting and XVII. Common Address Problems.

(b)   No-SDX address is incorrect. Refer client to SSA to report new mailing address for SSI. If there are problems or questions, call EIS at DMA.

B.   Ensure the EIS case has a valid address for the next month's SSI Medicaid Regular Run.

See XX. Troubleshooting and XVII. Common Address Problems, for instructions to resolve an incorrect address for an SSI Medicaid recipient.

➢ The USPS cannot forward Medicaid cards when the recipient's address changes, even if there is a forwarding order on file with the post office. If you have internet access you may use the following web site to validate addresses:

http://www.usps.com/ncsc/lookups/lookup_zip+4.html

➢ The state office does not pull any Medicaid cards when an address changes (regular Medicaid or SSI Medicaid). If the correct address is not on the Medicaid card by the appropriate regular run, the address printed on the Medicaid card will be incorrect.

XIX.   SDX SCREENS AND RELEVANT DATA

See EIS 1105, State Data Exchange (SDX) for additional information and SDX codes.

A.   SDX Page 1

```
VSD901-1      NC DEPT OF HEALTH AND HUMAN SERVICES    TODAY'S DATE: 04/02/2004
                          SDX  INFORMATION            PROCESS DATE: 02/23/2004


RECIPIENT:  FRANK           FRED    O     SSN: 123-45-6789
CUR REC IND:   1
OTHER NAME:    JOHNSON         RSDI CLAIM NO: 123456789A
SSN CORR IND:                  COUNTY:    92 - WAKE
RACE:          W               RESIDENCY: 03/01/1999  How long at this address?
SEX:           M               TELEPHONE: 919-857-4019
BIRTH DATE:    06/10/1960      RECIPIENT: FRED O FRANK
DEATH DATE:                    MAIL ADDR: 4235 FRANKLIN ST
RECIPIENT TYP: DI                         CHINA GROVE      NC
MARITAL STAT:   3                         22222-2222
HEAD OF HOUSE: N
STUDENT IND:   N
PAYEE CODE:    MTH             RESIDENCE: 123 E LANE ST
CUSTODY CODE:  PYE                        RALEIGH          NC
COMPETENCY CD:                            22222


                      Mailing and Residence addresses same?
In this example, the mailing address is in China Grove, but the recipient is in
Wake Co.


PF1/13=NEXT    PF2/14=PREV    PF3/15=MENU    PF8/20=BENDEX
PAGE: 1   NEXT SELECTION:                          KEYS:
```

BIRTH DATE-Evaluate appropriate aid program/categories.

RECIPIENT TYP-Adult, child, etc.

MARITAL STAT-Financial responsibility

HEAD OF HOUSE-1/3 reduced?

PAYEE CODE-Who is payee? See EIS 1105 for codes. See Page 4 for payee's name and mailing address.

CUSTODY CODE-Is there a payee?

RESIDENCY-The date the recipient began living in the current state and county.

MAIL ADDR-The recipient's mailing address.

RESIDENCE-The recipient's residence address.

    B.   SDX Page 2

```
VSD901-2      NC DEPT OF HEALTH AND HUMAN SERVICES    TODAY'S DATE: 04/02/2004
                        SDX  INFORMATION              PROCESS DATE: 02/23/2004


RECIPIENT:  FRANK          FRED    O    SSN: 123-45-6789


SSI APPLIC DATE : 06/11/1996    DENIAL CODE-DATE     :      -
SSI APP FILE DTE: 06/28/1996    APPEAL REASON        :
SSI ELIGIBLE DTE: 09/16/1998    APPEAL CODE-DATE-FLAG: H - 04/26/1997 -
DISABILITY ONSET: 06/01/1996    APPEAL DECISION CD/DT: FF - 07/31/1997
DISABILITY PAY  : F             RECORD ID CODE       : I
MEDICAID EFF DTE: 09/16/1998    TRANSACTION CODE     : 06      SEE EIS 1105
UNPAID MED EXP  : Y             LAST TRANS TYPE-DATE : AD - 06/01/1999
REDETERMINE DATE: 11/1998       3RD PARTY INSUR IND  : N
                                3RD PARTY INSUR DATE : 05/1997
                                FED ELIGIBILITY CODE : E


CHANGE MONTH:     03/04 11/03 10/03 09/03 02/02 07/96 06/96
JURIS STATE-CNTY: 34-80 34-13 34-13 34-13 34-40 34-13 00-00
PAYMENT STATUS:   C01   C01   C01   C01   N22   C01   E02
FED LIVING ARGMT: A     A     B     A           A     A
MEDICAID ELIG CD: Y     Y     Y     Y     R     Y     R


PF1/13=NEXT    PF2/14=PREV    PF3/15=MENU    PF8/20=BENDEX
PAGE: 2   NEXT SELECTION:                        KEYS:
```

SSI APPLIC DATE-Date of application for SSI-Important when client needs Medicaid for three months prior to SSI date of application.

DISABILITY ONSET-See EIS 1105. This is not necessarily the disability onset date.

MEDICAID EFF DTE-indicates when a change occurred. It does **not** indicate when Medicaid eligibility starts/started.

UNPAID MED EXP-Unpaid medical bills in 3 months prior to SSI date of application.

REDETERMINE DATE-When was the last SSI redetermination completed? Clue to validity of data on SDX.

CHANGE MONTH-Month change happened. Read straight down in the column of data under the date. Compare this column to the one to the right of it to determine what changed.

PAYMENT STATUS-Best clue to reason for ineligibility

MEDICAID ELIG CD-The most important field on the SDX for determining eligibility for SSI Medicaid.

♦ If this code is C, G, Q or Y, the individual is eligible for SSI Medicaid.

♦ If the Medicaid Eligibility Code is R AND the Payment Status code is E02, the individual is eligible for SSI Medicaid.

♦ If the Medicaid Eligibility Code is N AND the Payment Status code is N24, the individual is eligible for SSI Medicaid.

TRANSACTION CODE-See EIS 1105. This is the last action that updated the SDX.

LAST TRANS TYPE-DATE-See EIS 1105. This is the last action that updated the SSI record at SSA.

C.   SDX Page 3

```
┌──────────────────────────────────────────────────────────────────────────┐
│ VSD901-3      NC DEPT OF HEALTH AND HUMAN SERVICES   TODAY'S DATE: 04/02/2004│
│                    SDX  INFORMATION                  PROCESS DATE: 02/23/2004│
│                                                                            │
│ RECIPIENT:  FRANK          FRED    O    SSN: 123-45-6789                    │
│                                                                            │
│ PAYMENTS:                   JANUARY      JANUARY     DECEMBER     NOVEMBER  │
│ COUNTY:                        80           80          80           80    │
│ SSI GROSS AMOUNT:          530.00       530.00      530.00       512.00    │
│ SSI MO. ASSIST AMT:        510.00       510.00      492.00       492.00    │
│ COUNTABLE EARNED:                                                          │
│ COUNTABLE UNEARNED:                                                        │
│                                                                            │
│ CONDITIONAL PYMT:                        ---- EARNED INCOME ----           │
│ DEEMED INC:    CODE:                     PERIOD:                           │
│ ADVANCE PAYMENT:                         WAGE EST:                         │
│ OVER/UNDER PAY IND: O                    RETRO AMT:                        │
│ OVER PAY BALANCE:     138.68             SELF EMPLOY:                      │
│ OVER PAY WAIVER:                                                           │
│ CUR RECOVERY AMT:      20.00             BUDGET MONTH IND: 2               │
│ BLIND WORK EXPENSE:                                                        │
│                                                                            │
│                                                                            │
│ PF1/13=NEXT   PF2/14=PREV   PF3/15=MENU   PF8/20=BENDEX                    │
│ PAGE: 3   NEXT SELECTION:                       KEYS:                      │
└──────────────────────────────────────────────────────────────────────────┘
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SSI GROSS AMOUNT-Total amount of SSI benefit for which the individual is eligible.

SSI MO. ASSIST AMT-Amount of SSI benefit actually paid. Individual is eligible for SSI Medicaid even if the total benefit is recouped.

COUNTABLE EARNED-Amount of earnings counted in determination of SSI eligibility-lead to wages. See page 4 and 5 of SDX to see more information.

COUNTABLE UNEARNED-Amount of unearned income counted in determination of SSI eligibility-lead to other income. See page 4 and 5 of SDX to see more information.

DEEMED INC-from financially responsible person(s)

DEEMED INC CODE –Source Code

EARNED INCOME-recipient's earned income

CUR RECOVERY AMT-SSI recoupment amount

D.   SDX Page 4

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┌─────────────────────────────────────────────────────────────────────────┐
│ VSD901-4      NC DEPT OF HEALTH AND HUMAN SERVICES   TODAY'S DATE: 04/02/2004│
│                      SDX  INFORMATION              PROCESS DATE: 02/23/2004│
│                                                                           │
│ RECIPIENT:  FRANK            FRED   O   SSN: 123-45-6789                   │
│                                                                           │
│ --------------------- UNEARNED INCOME INFORMATION --------------------    │
│ TYPE    START      STOP      AMOUNT   FREQUENCY   CLAIM ID    VERIFICATION │
│    A   05/1997   06/1997                  T       123456789A       1       │
│    J   10/1998   10/1998     164.66       N                       7       │
│    H   09/1998   09/1998     184.66       N       AN02 TO B       0       │
│                                                                           │
│                                                                           │
│                                                                           │
│    REP PAYEE/AGENCY:   WANDA    S FRANK  IN TRUST FOR                      │
│           ADDRESS:   4235 FRANKLIN ST APT 304                             │
│                                                                           │
│                                                                           │
│                                                                           │
│                     CHINA GROVE            NC 22222 2222                   │
│                                                                           │
│                                                                           │
│ PF1/13=NEXT   PF2/14=PREV   PF3/15=MENU   PF8/20=BENDEX                    │
│ PAGE: 4   NEXT SELECTION:                       KEYS:                      │
└─────────────────────────────────────────────────────────────────────────┘
```

See EIS 1105 for codes. This page is a good lead to other types of
unearned income.

REP PAYEE/AGENCY: Representative Payee/Agency Name
ADDRESS: Representative Payee/Agency mailing address-EIS uses this
address for the EIS case address when there is a payee.

    E.   SDX Page 5

```
VSD901-5       NC DEPT OF HEALTH AND HUMAN SERVICES   TODAY'S DATE:  04/02/2004
                          SDX  INFORMATION            PROCESS DATE: 02/23/2004


RECIPIENT:  FRANK          FRED    O     SSN: 123-45-6789


ELIG SPOUSE SSN:  000-00-0000
ESSENTIAL PERSON: 0
ESSENTIAL SSN:    000-00-0000


                  ---- INELIGIBLE SPOUSE 1 ----- ---- INELIGIBLE SPOUSE 2 -----
IND:              I
NAME:             ANNE   FRANK
SSN:              222-22-2222
UNEARN INCOME:
UNEARN INC TYP:
UNEARN INC FREQ:
EARNED INC WAGE:   352.35
SELF EMPLOY INC:




PF1/13=NEXT   PF2/14=PREV   PF3/15=MENU   PF8/20=BENDEX
PAGE: 5   NEXT SELECTION:                        KEYS:
```

ELIG SPOUSE SSN-Lead to spouse/parent information.

INELIGIBLE SPOUSE 1-Lead to spouse/parent information.

F.   SDX Page 6

```
┌──────────────────────────────────────────────────────────────────────┐
│ VSD901-6      NC DEPT OF HEALTH AND HUMAN SERVICES   TODAY'S DATE: 04/02/2004 │
│                      SDX  INFORMATION              PROCESS DATE: 02/23/2004 │
│                                                                        │
│ RECIPIENT:  FRANK          FRED    O    SSN: 123-45-6789               │
│                                                                        │
│ -- RESOURCES --                                                        │
│       HOUSE: Z             MEDICARE ENTITLEMNT CD:    N                │
│     VEHICLE: Z             QUAL MEDICARE BENEFICRY:                    │
│   INSURANCE: Z             CONVERTED RAILROAD #:                       │
│    PROPERTY: Z             FOOD STAMPS APP-DATE-STAT: N - 11/1998 - N  │
│       OTHER: Z             ALIEN IND-RESIDENCY DATE:  Q -              │
│    MN DIARY:               COUNTRY OF ORIGIN:                          │
│     MN DATE:               ALIEN SPONSOR STATUS CODE:                  │
│                            ALIEN ELIGIBILITY CODE:                     │
│                            FOREIGN LANGUAGE CODE:                      │
│ PASS:                      ZEBLEY IND:                                 │
│ 1619A:                     ROLLBACK:                                   │
│ 1619B:                     DIR DEPOSIT: C                              │
│                                                                        │
│ SSN VERIFY CD:                                                         │
│ MULTIPLE SSN:                                                          │
│                                                                        │
│                                                                        │
│ PF1/13=NEXT   PF2/14=PREV   PF3/15=MENU   PF8/20=BENDEX                │
│ PAGE: 6   NEXT SELECTION:                       KEYS:                  │
└──────────────────────────────────────────────────────────────────────┘
```

RESOURCES-Lead to resources. See EIS 1105 for codes.

PASS-Lead to income for working blind and disabled recipients.

1619A-Lead to wages.

1619B-Lead to wages. 1619B individuals are eligible SSI Medicaid.

MULTIPLE SSN-Other SSNs the individual uses or has used.

MEDICARE ENTITLEMNT CD-EIS uses this code to determine the appropriate
Medicaid Classification. There is an existing system problem related to
the interface between EIS and SSA that sometimes causes this code to be
incorrect. Medicaid claims should not be affected. If the client has
trouble using the Medicaid card due to inaccurate Medicare information
printed on the card, contact the provider and explain the system problem.
If the provider has problems with claims due to inaccurate Medicare
information on the Medicaid card, refer the provider to DMA Claims at 919-
857-4018.

Use BENDEX or SOLQ to verify Medicare entitlement. Do not depend on this
field on the SDX screen.

DIR DEPOSIT-Lead to bank account.

G.   Special Example:

Pattern of eligibility and ineligibility due to spouse's/parent's deemed wages:

```
┌─────────────────────────────────────────────────────────────────────┐
│ VSD901-2      NC DEPT OF HEALTH AND HUMAN SERVICES   TODAY'S DATE: 04/02/2004 │
│                    SDX  INFORMATION             PROCESS DATE: 02/23/2004 │
│                                                                         │
│ RECIPIENT:  FRANK           DONALD    L   SSN: 123-45-6789              │
│                                                                         │
│ SSI APPLIC DATE : 02/21/1995    DENIAL CODE-DATE    :    -             │
│ SSI APP FILE DTE: 03/03/1995    APPEAL REASON:                          │
│ SSI ELIGIBLE DTE: 00/00/0000    APPEAL CODE-DATE-FLAG:   -           -  │
│ SSI ELIGIBLE DTE: 00/00/0000    APPEAL DECISION CD/DT:                  │
│ DISABILITY PAY  : F             RECORD ID CODE      : P                 │
│ MEDICAID EFF DTE: 12/01/2000    TRANSACTION CODE    : 07                │
│ UNPAID MED EXP  : Y             LAST TRANS TYPE-DATE : CO - 01/03/2001  │
│ REDETERMINE DATE: 04/1999       3RD PARTY INSUR IND  : N                │
│                                 3RD PARTY INSUR DATE : 03/1995          │
│                                 FED ELIGIBILITY CODE : N                │
│                                                                         │
│                                                                         │
│ CHANGE MONTH:      12/98 10/98 08/98 03/98 02/95 01/95                  │
│ JURIS STATE-CNTY:  34-00 34-00 34-00 34-00 34-00 00-00                  │
│ PAYMENT STATUS:    C01   N01   C01   N01   C01                          │
│ FED LIVING ARGMT:  C     C     C     C     C                            │
│ MEDICAID ELIG CD:  Y     R     Y     R     Y                            │
│                                                                         │
│                                                                         │
│ PF1/13=NEXT    PF2/14=PREV   PF3/15=MENU   PF8/20=BENDEX                │
│ PAGE: 2   NEXT SELECTION:                      KEYS:                    │
└─────────────────────────────────────────────────────────────────────┘
```

Notice Medicaid Eligibility Code changes and the months they are associated with.

Read above, right to left:

SSI eligibility began 2/95.

Ineligible beginning 3/98.

Eligible again 8-98.

Ineligible beginning 10-98.

Eligible again 12-98.

XX.   TROUBLESHOOTING

   A.   Individual should not be active SSI Medicaid recipient

SITUATION	HOW TO VERIFY ON SDX	WHEN SHOULD EIS PROCESS CHANGE?
SSI recipient moves out of state-SSI Medicaid still active	See page 2 of SDX screens. TRANSACTION CODE =05	Look at the PROCESS DATE, top right side of SDX screen. EIS should process the change no later than 10 calendar days after the PROCESS DATE.
SSI recipient dies-SSI Medicaid still active	See page 1 of SDX screens. EIS looks for DEATH DATE.	• If 10 calendar days have not passed since the PROCESS DATE, EIS may not yet have received the SDX update to process it. Check the case on Monday, 10 days after the process date on the SDX. If the EIS case is still not updated, and there is no pending SDX Exception, there is a problem.
SSI recipient loses SSI eligibility-SSI Medicaid still active in EIS	See page 2 of SDX. See EIS 4200, Part Three, I. A. Determine whether the individual is still eligible for SSI. If the individual is ineligible for SSI, see WHEN SHOULD EIS PROCESS CHANGE?, next column.	• If MORE THAN 10 calendar days have passed, there is a problem. • If there is a problem: If the case is Medicaid only, call EIS at DMA. If the case is SAA or SAD, call DSS Automation.

XX.   TROUBLESHOOTING-(CONT'D)

  B.   Individual is not active SSI Medicaid and should be

SITUATION	HOW TO VERIFY ON SDX	WHEN SHOULD EIS PROCESS CHANGE?

SSI is approved–SSI Medicaid is not active in EIS	See page 2 of SDX screens.
	
	See EIS 4200, Part Three, I. A.
	
	Determine whether the individual is eligible for SSI.
	
	If the individual is eligible for SSI, see WHEN SHOULD EIS PROCESS CHANGE?, next column
		Look at the PROCESS DATE, top right side of SDX screen.
		
		EIS should process the change no later than 10 calendar days after the PROCESS DATE.
		
		• If 10 calendar days have not passed since the PROCESS DATE, EIS may not yet have received the SDX update to process it.
		
		  Check the case on Monday, 10 days after the process date on the SDX. If the EIS case is still not updated, and there is no pending SDX Exception, there is a problem.
		
		• If MORE THAN 10 calendar days have passed, there is a problem.
		
		• If there is a problem:
		
		  If the case is Medicaid only, call EIS at DMA.
		
		  If the case is SAA or SAD, call DSS Automation.

XX.   TROUBLESHOOTING-(CONT'D)

      C.   Individual has incorrect address in EIS and/or on Medicaid card

SITUATION	RESOLUTION
SSI individual moved. New address is not in EIS	**EIS has a private living arrangement:** See page 1 of the SDX screens, unless there is a payee. If there is a payee, see page 4 of the SDX. Is the new address on the SDX? • Yes and the process date is more than 10 calendar days ago-Call EIS at DMA. • Yes and the process date is less than 10 calendar days ago – Check the case on the next Monday to see if EIS updated on Friday night. If the EIS case is still not updated, and there is no pending SDX Exception, and the case has a private living arrangement, there is a problem. Call EIS at DMA. • No-Refer the client to SSA to report the new <u>mailing</u> address for SSI. We suggest the client contact the local Social Security office rather than the 1-800 location. The local SSA office is more aware of EIS address restrictions. If there is a payee, the payee must contact SSA. Report the new address to other applicable sections of your agency, Food Stamps, Work First, Services, etc. **EIS has a long term care living arrangement, OR the case is SAA OR SAB OR HSF:** See EIS 4200, Part Five, II.
Address is correct in EIS and on SDX, but the Medicaid card has a different address	See XVII. COMMON ADDRESS PROBLEMS.

XX.   TROUBLESHOOTING-(CONT'D)

   D.   Other problems

SITUATION	RESOLUTION
SSI individual in wrong county in EIS, but address is correct.	See page 1 of the SDX screens and EIS 4200, Part Five, II. PLA-Is the county correct on the SDX? • Yes and the process date is more than 10 calendar days ago-Call EIS at DMA. • Yes and the process date is less than 10 calendar days ago – Check the case on the next Monday to see if EIS updated on Friday night. If the EIS case is still not updated, and there is no pending SDX Exception, there is a problem. Call EIS at DMA. • No-Send a DMA-5049 to SSA: Say "Please change the county of responsibility on the SSI record to SMITH County." Always use the county name, not the EIS county number. LTC-Key county transfer in EIS. Send a DMA-5049 to SSA. Say "Please change the county of responsibility on the SSI record to SMITH County." Always use the county name, not the EIS county number. It may be helpful to add something like "Smith County individual in long term care in Jones County. Smith County is still county of residence for Medicaid purposes." HSF-Key county transfer in EIS. Send a DMA-5049 to SSA. Say "Please change the county of responsibility on the SSI record to SMITH County." Always use the county name, not the EIS county number. It may be helpful to add something like "Smith County individual in foster care in Jones County. Smith County is still county of residence for Medicaid purposes." SAA or SAD-Key county transfer in EIS. Send a DMA-5049 to SSA. Say "Please change the county of responsibility on the SSI record to SMITH County." Always use the county name, not the EIS county number. It may be helpful to add something like "Smith County individual in rest home in Jones County. Smith County is still county of residence for Special Assistance and Medicaid purposes."

XX. D TROUBLESHOOTING-OTHER PROBLEMS-(CONT'D)

SITUATION	RESOLUTION
SSI individual placed in adoptive home	Call EIS at DMA. All SSI recipients are categorically eligible for Medicaid. We will work with you to determine the best way to protect confidentiality.
SSI individual has a DATE OF DEATH on the SDX, but is still living and needs Medicaid	Call the Medicaid Eligibility Unit at DMA. Also refer the individual to SSA to re-establish SSI eligibility.
SSI individual moved to NC and needs Medicaid	See EIS 4200, Part One, III and MA-1000

Call for help!

EIS at DMA------------------SSI Medicaid-MAA, MAD, HSF

DSS Automation--------------SSI Medicaid-SAA, SAD

Medicaid Eligibility Unit---SSI Medicaid Policy Questions

DMA Buy-In Unit-------------SSI Medicaid Medicare Issues

The Contact numbers for the above units are located in EIS 1200.

Link to DMA-5049
http://info.dhhs.state.nc.us/olm/forms/dma/dma-5049-ia.pdf