

**DMA ADMINISTRATIVE LETTER NO: 07-10,  
DSS ADMINISTRATIVE LETTER  
PERFORMANCE MANAGEMENT/REPORTING  
AND EVALUATION MANAGEMENT PM-REM-  
AL-07-10,  
DAAS ADMINISTRATIVE LETTER NO: 10-14,  
AUTHORIZED REPRESENTATIVE SCREEN**

**DATE:** August 16, 2010

**SUBJECT:** Authorized Representative in EIS

**DISTRIBUTION:** County Directors of Social Services  
Medicaid Eligibility Staff  
Work First Case Managers, Supervisors, and Staff  
Special Assistance Staff

**I. BACKGROUND**

County departments of social services (DSS) requested the capacity to store Authorized Representative, power of attorney or guardian information in the Eligibility Information System (EIS) so that this information is available for Medicaid and Special Assistance notices. Currently, Authorized Representative information is keyed on the DSS-8125 and must be rekeyed each time a notice is produced. Because an individual can have more than one type of representative, DMA must create a hierarchy so that the caseworker will know which representative must be entered into the 8125.

New screens will be added in EIS to allow for the entry and display of Authorized Representative, PACE Agency and CAP Case Manager data. Currently, PACE data is keyed in the Authorized Representative field on the DSS-8125. Workers will now be able to enter both Authorized Representative data and either a PACE or CAP entry. Authorized Representative/PACE/CAP data will be displayed on the Notice Register in NCXPTR. Authorized Representative is only applicable for Medicaid and Special Assistance cases.

Further, DMA is legally required to notify Authorized Representatives, powers of attorney, etc. of prior approval denials, service denials, service reductions and service terminations. Therefore, DMA must be able to transmit Authorized Representative information to our claims contractor and possibly other DMA contractors so that medical service denial and prior approval denial notices can be sent to these representatives by the contractors. Authorized Representative data will update in the EIS overnight in a batch process and the current nightly eligibility file will be used to send data to the claims contractor.

## **II. MEDICAID POLICY**

### **A. Hierarchy of Representatives**

The following is a list of representatives ordered by the highest priority representative first and the lowest last. When there is more than one type of representative, always choose the one with the higher priority.

1. Legal Guardian (includes DSS with custody or guardianship; if individual has a Guardian of the Person and a Guardian of the Estate, choose the Guardian of the Person).
2. Power of Attorney.
3. Health Care Power of Attorney.
4. Department of Social Services (placement responsibility only).
5. Spouse (Not separated).
6. Parent (for children under 21, a parent who is not the casehead but who lives in the home).
7. Authorized Representative (An individual designated in writing by the applicant/recipient to assist with eligibility issues and who can have access to the information in the case file).
8. Authorized Representative as designated by SSA on SDX.

### **B. Representative Information for Applications**

1. Contact the applicant and ask if he has any of the representatives listed in the hierarchy of representatives by reviewing the list with them. For LIS and mail-in applications, obtain the representative information during the phone interview. The individual may have more than one representative, therefore do not stop the inquiry when the individual provides one name. An individual can also have more than one power of attorney; if he has more than one ask him to choose one to receive notices. Document the applicant's response. If the individual is incapable of choosing, use the name of the Power of Attorney who has been helping with the case.
2. Ask the language preference for each representative named. Document the applicant's response.

3. Guardianship and/or power of attorney papers
  - a. Request a copy of the guardianship and/or power of attorney papers using the DMA-5097/5097S.
  - b. If the individual does not respond to the initial request, send a second request.
  - c. If the individual does not respond to the second request and all other necessary information has been received, process the application within the normal time frame.
  - d. If the individual has more than one representative and has supplied papers for only one, enter the information for the one that has been verified, even if the unverified representative has a higher priority.

### **C. Hospital as Authorized Representative**

A hospital may be an Authorized Representative for an applicant, but the authorization may be limited to the application process, the application process and any hearing and appeal following a denial, or for another specified time.

1. The hospital must identify an individual to serve as the Authorized Representative. If an individual's name and contact number are not on the Authorized Representative form, contact the hospital and obtain this information.
2. If the individual has a representative of a higher priority than the hospital, enter the higher priority representative in the representative field. Enter the hospital Authorized Representative information in the PACE Agency/CAP Manager field on the 8124, provided there is no PACE Agency or CAP Manager.
3. If the application is approved and the hospital is listed as Authorized Representative for the application process only, remove the hospital from the Representative Field or PACE Agency/CAP Manager field the day after approval (See III.D).
4. If the application is denied, maintain the hospital Authorized Representative information on the 8124.

#### **D. Representative Information for Redeterminations**

1. No representative information in file
  - a. Ask the individual if he has a representative by reviewing the hierarchy of representatives list with them.
  - b. If the individual now has a legal guardian and/or power of attorney, request a copy of the guardianship and/or power of attorney papers.
2. Representative information in file
  - a. Verify that the individual listed is still the current representative.
  - b. Ask the individual whether he has any new representatives. Review the hierarchy of representatives list with the recipient in making the inquiry.
  - c. If the individual has one or more new representatives, find out the language preference of each representative.
3. Guardianship and/or power of attorney papers
  - a. If there are guardianship and or power of attorney papers in the file, determine if they are still valid. If the papers have expired or will expire during the redetermination process, request new papers.
  - b. If the individual has a new legal guardian and/or power of attorney, request a copy of the guardianship and/or power of attorney papers using the DMA-5097.
  - c. If the individual does not respond to the request for information, complete the redetermination within the normal time frame. If the individual provides the information after the redetermination is completed, key the information when received.

### **E. SSI Cases**

1. If there is no Authorized Representative information in EIS, Authorized Representative information from the SDX will automatically populate to the 8125.
2. If there is Authorized Representative information in EIS, Authorized Representative information from SDX will not overlay the existing information. The Authorized Representative information from SSA is written to a report on NCXPTR (See V.A).
  - a. If the Authorized Representative information in XPTR is the same as that contained in EIS, no change is needed.
  - b. If the Authorized Representative information in XPTR conflicts with that in EIS, contact the recipient and ask which Authorized Representative is current. If the Authorized Representative has changed, request a copy of the new Authorized Representative paper from the recipient. Key the new information into the 8125.

### **III. EIS CHANGES**

Effective August 23, 2010, new screens will be added in EIS to allow for the entry and display of Authorized Representative/PACE/CAP data. EIS will now accept both an Authorized Representative and a CAP Case Manager or PACE Agency.

The DSS-8124 will include a new field "AUTHREP". This one byte field requires the entry of a "Y" or "N" indicator for all programs except AAF, RRF and SCD. For AAF, RRF and SCD, the system defaults to "N". For all other programs, if a "Y" is entered, the system requires the entry of Authorized Representative/PACE/CAP data prior to the disposition of the application. The indicator will display on the application turnaround and case profile.

A new PF12 key option has been added to the DSS-8124. This option takes you to a new screen "AUTH REP – PACE/CAP AGENCY DATA" where this data is entered. This new data entry screen can only be accessed from the DSS-8124.

The Authorized Representative "Y" or "N" indicator will display on the AD and CD inquiry screens, with a new PF12 Key option on both screens to view the Authorized Representative/PACE/CAP data.

When the A/R has more than one representative, the county must be able to identify which representative has priority so that notices can be sent to the proper individual. DMA has created a hierarchy for the county to use to determine which representative should receive notices. The chart below lists the various types of representatives and provides a code to be entered in EIS in the relationship field for each type. Representative type A is given the highest priority and representative type H the lowest.

Hierarchy	Relationship Type	EIS Code
first	Legal Guardian (includes DSS with custody or guardianship)	A
second	Power of Attorney	B
third	Health Care Power of Attorney	C
fourth	Department of Social Services (placement responsibility only)	D
fifth	Spouse (Not separated)	E
sixth	Parent (for children under 21, a parent who is not the casehead but who lives in the home).	F
seventh	Authorized Representative (An individual designated in writing by the applicant/recipient to assist with eligibility issues and who can have access to the information in the case file.)	G
eighth	Authorized Representative as designated by SSA on SDX	H

In addition, a language preference field has been added so that the language preference of the representative can be identified. Use the existing language preference codes found in EIS 4000 (see chart below).

Code	Value	Code	Value	Code	Value
EN	English	HI	Hindi	PC	Portuguese Creole
SP	Spanish	HM	Hmong	PG	Portuguese
AR	Arabic	HU	Hungarian	PO	Polish
CA	Cambodian	IT	Italian	RU	Russian
CH	Chinese	JA	Japanese	SC	Serbo-Croatian
FC	French Creole	KO	Korean	TA	Tagalog
FR	French	LA	Laotian	TH	Thai
GE	German	MI	Miao	UR	Urdu
GR	Greek	MK	Mon-Khmer	VI	Vietnamese
GU	Gujarati	PE	Persian	OT	Other

**IV. EIS KEYING INSTRUCTIONS**

**A. Applications – DSS-8124 (including Transitional Medicaid Applications)**

1. If the applicant has a Representative, POA, Guardian, PACE agency, CAP Case Manager, etc., enter a "Y" in the "Auth Rep" field. If no, enter "N". Complete all required fields and press enter (screen shot A).

EJA003										** EIS FORM 8124 **										FORM ID H444444 G TYPE APP 1 WORKER														
CO NO					CO CASE					DIST					A1					ADMIN					TRANS									
CASE ID					FOOD STP #					A2					INDS ON APP																			
HOW APP RECEIVED?										BD					FAM PLAN?					CITY/ST/ZIP														
A/P/C					QI1?					HLTH CH?					C/H INC					DIS/DET ONG					RETRO					<b>AUTHREP</b>				
LN		INDIV ID			CTZ		LN		INDIV ID			CTZ		LN		INDIV ID			CTZ															
APPL DATE										P/DISP TYPE					DATE					REASON					NOTICE									
JOBS/WORK SAVINGS										R/DISP TYPE					DATE					REASON					NOTICE									
_____															_____																			
APPLICANT SIGNATURE															CASEWORKER SIGNATURE																			
ENTER THE REQUIRED INFORMATION ON THIS SCREEN AND PRESS ENTER TO REGISTER THIS APPLICATION																																		

**Screen Shot A.**

- If you entered "Y", you will get an option to use the **PF12 key** to access the "Auth Rep - PACE/CAP Agency Data Screen" (screen shot A-1).

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EJA003          ** EIS FORM 8124 **  FORM ID H444444 G TYPE APP 1 WORKER SMC
CO NO 00 CO CASE          DIST SMC A1 800 RUGGLES DR      ADMIN  TRANS
CASE ID 66667777  FOOD STP #          A2                INDS ON APP 01
HOW APP RECEIVED? M BD  FAM PLAN?      CITY/ST/ZIP  RALEIGH      NC 27699
A/P/C M AD QI1?  HLTH CH?  C/H INC  Y DIS/DET ONG  Y RETRO  AUTHREP Y
LN INDIV ID      Z C R DQ  INDIVIDUAL NAME          SUF BIRTH  SEX  SSN  CLM
01 999999999 P V      N JOHN      Q PUBLIC          12272004 M 666666666 N

APPL DATE 07012010  P/DISP TYPE  DATE          REASON  NOTICE
JOBS/WORK SAVINGS  R/DISP TYPE  DATE          REASON  NOTICE

_____  

APPLICANT SIGNATURE          CASEWORKER SIGNATURE
PRESS PF12 TO CONTINUE TO THE AUTHORIZED REP DATA SCREEN
IF AN INCORRECT IND ID IS ENTERED, RE-ENTER ID AND PRESS PF6 ELSE
RECORD NECESSARY INFO AND PRESS ENTER TO UPDATE DATA BASE
  
```

**Screen Shot A-1**

- The application number, case ID number, county case number, district number, worker number and aid program are brought forward from the DSS-8124 to the Auth Rep – PACE/CAP Data Screen (screen shot B).

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EJA054          NORTH CAROLINA DEPT HEALTH AND HUMAN SERVICES  07/14/2010
EXA054          ELIGIBILITY INFORMATION SYSTEM                16:01:25
                AUTH REP - PACE/CAP AGENCY DATA SCREEN

APP NO  CASE ID  CO CASE  CO NO  DIST  WKR AID CAT
H123456  66665555          00   SMC   SMC   MAD

AUTH FIRST  AUTH LAST  SUFFIX RELATIONSHIP CD  LANG PREF

ADDR 1          ADDR 2  CITY  ST  ZIP  PHONE #
                00000  000-000-0000

PACE AGENCY/CAP MANAGER

ADDR1          ADDR2  CITY  ST  ZIP  PHONE #
                00000  000-000-0000

PF2: RETURN TO INQUIRY MENU
APPLICATION HAS BEEN UPDATED
PLEASE ENTER AUTH REP AND/OR PACE/CAP INFO AND PRESS ENTER
  
```

**Screen Shot B**



4. For the Authorized Representative, required fields are the name, address, relationship code of the representative to the applicant, and the language preference of the representative.
5. Be sure to enter the name for the representative who corresponds to the highest priority type on the hierarchy list above.
6. If you do not have the information available to complete the required fields, you may enter this data at any time prior to the disposition of the application or when the disposition is keyed.
7. If the applicant is enrolled in CAP or PACE, key the data for the CAP Case Manager or PACE Agency. Required fields are the CAP Case Manager name/Pace Agency name, and address. Up to thirty characters may be keyed for the name field.
8. Press enter to update the data.
9. You may change or delete this data at any time prior to the disposition of the application or when the disposition is keyed. (See below instructions for Deleting Authorized Representative/PACE/CAP-Applications).
10. If denying or withdrawing the application, changes to the Authorized Representative/PACE/CAP data must be made on the DSS-8124. If approving the application, data changes may be made on either the DSS-8124 or the DSS-8125.

**B. AD Inquiry – Viewing Authorized Representative Data on Application**

- The Authorized Representative indicator is displayed on the Application Data (AD) screen. Use PF12 key option to view the Authorized Representative/PACE/CAP data (screen shot C).

EIS APPLICATION DATA FOR PENDING APP NO H444444G											
EXA901											
JOHN	Q PUBLIC										
ADDRESS LINE 1	WORKER	CO	CO-CASE	DIST	IND-CT	FSTAMP#	HEAD	INCL?	AUTHREP		
100 RALEIGH RD	SMC	29	023969	SMC	01			Y	Y		
ADDRESS LINE 2	VER	AFS	BD	P/DISPOSITION	DATE	REASON	NOTICE	STATUS			
					00000000			PA			
CITY	STATE	ZIP	APP	RECVD	R/DISPOSITION	DATE	REASON	NOTICE	LCD		
RALEIGH	NC	27777	D			00000000			2010195		
LN	INDIVIDUAL NAME			BIRTH-DT	SEX	CIT	CLM	SSN	INDIV-ID		
01 JOHN	Q PUBLIC			12141983	M	V	N	000000000	999999999N		
SELECTION AD KEY H444444G											
604-INQUIRY IS COMPLETE											
PF12 AUTH REP INFO											

**Screen Shot C**

- The application number, case ID number, county case number, district number, worker number and aid program as well as other identifying information from the application are brought forward to the Current Authorized Representative data screen (screen shot D).

EIS APPLICATION DATA FOR PENDING APP NO H444444G											
CURRENT AUTH REP DATA											
EXA901											
JOHN	Q PUBLIC										
	WORKER	CO	CO-CASE	DIST	IND-CT	FSTAMP#	HEAD	INCL?	AUTHREP		
	SMC	29		SMC	01			Y	Y		
AUTH FIRST	AUTH LAST	SUFFIX RELATIONSHIP			CD	LANG		PREF			
GEORGE	WASHINGTON	A				EN					
ADDR 1	ADDR 2	CITY		ST	ZIP	PHONE #					
800 RUGGLES DR		RALEIGH		NC	27699	919-554-0000					
PACE AGENCY/CAP MANAGER											
BETTY FORD											
ADDR1	ADDR2	CITY		ST	ZIP	PHONE #					
800 RUGGLES DR		RALEIGH		NC	27699	919-554-0000					
SELECTION KEY											

**Screen Shot D**

**C. CD Inquiry – Viewing Authorized Representative Data on EIS Case**

1. The Authorized Representative indicator is displayed on the EIS Current Case Data (CD) screen (screen shot E).

```

EIS CURRENT CASE DATA

CASE-ID 12345678   CREATED 2010112   LAST-CHG 2010182   FORM-ID 44444464B
CO 36 CO-CASE           DIST SMC CO-REASSIGN 0 000000 TERM 00000000
CHEAD/PAYEE JOHN     Q PUBLIC           ID 999999999L (EN) PH#
ADDRESS LINE 1 1209 RALEIGH RD           ADDRESS LINE 2
CITY RALEIGH     STATE NC  ZIPCODE 22222  WORKER-NO SMC  NEEDS UNIT
SUB-PAY-CODE           SUB-PAYEE-NAME

APPLICATION-NO H222222           APPL-DATE 02122010           APPL-TYPE 1
ONGOING-DISP: DATE 04232010 REASON A1   RETRO-DISP: DATE 00000000 REASON
AID-PROG M  AID-CATG AD  CHILD ONLY RSN   SPOUSE IND N AUTH REP Y
PYMT-RE VW-PERD 000000 000000 PYMT-TYPE 9  MO-PYMT-AMT 000000 PYMT-EFF 000000
MED-STAT A MED-EFF-DATE 08012010 MEDICAID-CERT-PERD 08012010 01312011
MED-DEDUCTIBLE-BAL 00000.00  MEDIC-CLASS N  PAT-MO-LIABILITY-AMT 00000

GROSS INC 00000.00  DISREGD 00000.00  TOT-UNEARN 00000.00  MAIN-AMT 00903.00
WORK-EXP 00000.00  NET-EARNED 00000.00  RSDI-AMT 00000.00  AMBULATORY-CAP
CHILD/ADULT-CARE 00000.00  SSI-AMT 00000.00  DOMICILIARY-RATE 0000.00
GRANT-RECOUP 0000 000000  OTH-UNEARN 00000.00  TOT-COUNT-MO-INC 00000.00

FOOD-STAMP           STEP-PARENT  PACE-ENRLL  EPICS CLM  N  SSI  N  VA-PAY  N
SELECTION:           KEY: 12345678
CAP CASE = CM           PF12 AUTH REP INFO
  
```

**Screen Shot E**

2. Use PF12 key option to view the EIS Current Auth Rep Case Data screen (screen shot F).

```

EIS CURRENT AUTH REP CASE DATA

CASE-ID 12345678   CREATED 2010112   LAST-CHG 2010182   FORM-ID 44444444B
CO 36 CO-CASE           DIST SMC CO-REASSIGN 0 000000 TERM 00000000
CHEAD/PAYEE JOHN     Q PUBLIC           ID 999999999L (EN) PH#

AUTH FIRST  AUTH LAST  SUFFIX RELATIONSHIP CD  LANG PEF
MYAUTHFST  MYAUTHLST  B  EN

ADDR 1  ADDR 2  CITY  ST  ZIP  PHONE #
3004 MAPLE AVE  RALEIGH  NC  11111  919-456-6789

PACE AGENCY/CAP MANAGER
MYCAPMANAGER

ADDR1  ADDR2  CITY  ST  ZIP  PHONE #
9999 RALEIGH RD  RALEIGH  NC  22222  919-333-5555

SELECTION:           KEY:
  
```

**Screen Shot F**

**D. Deleting or Changing Authorized Representative/PACE/CAP – Applications**

1. Use the DSS-8124 (function 7 to redisplay) or DSS-8125 to delete the Authorized Representative/PACE Agency/CAP Case Manager from an application in EIS. (See section F below for deleting using DSS-8125).
2. Key an \* in the first position of the Authorized Representative first name field and/or CAP Case Manager/PACE Agency name to remove all data (screen shot G).

```

EJA054          NORTH CAROLINA DEPT HEALTH AND HUMAN SERVICES      07/14/2010
EXA054          ELIGIBILITY INFORMATION SYSTEM                    16:01:25
                AUTH REP - PACE/CAP AGENCY DATA SCREEN

APP NO   CASE ID   CO CASE   CO NO   DIST   WKR AID CAT
H123456  55554444      00      SMC     SMC     MAD

AUTH FIRST  AUTH LAST  SUFFIX RELATIONSHIP CD  LANG PREF
*ohn Q.    Public      B                               EN

ADDR 1          ADDR 2          CITY          ST  ZIP  PHONE #
5555 Raleigh Rd          Raleigh      NC  27777  919-555-1212

PACE AGENCY/CAP MANAGER
*y CAP Manager

ADDR1          ADDR2          CITY          ST  ZIP  PHONE #
1229 Raleigh Rd          Raleigh      NC  45921  919-555-1212

PF2: RETURN TO INQUIRY MENU

PLEASE ENTER AUTH REP AND/OR PACE/CAP INFO AND PRESS ENTER
  
```

**Screen Shot G**

3. Data will be removed overnight in batch processing.
4. If both the Authorized Representative and PACE/CAP data is removed, EIS will automatically reset the Authorized Representative indicator to "N".
5. At case termination, EIS will delete Authorized Representative/PACE/CAP data from the case after the notice has been generated. If the individual reapplies for assistance, Authorized Representative/PACE/CAP data must be reentered in EIS.
6. To change an entry previously made on the Authorized Representative/PACE/CAP agency data screen, you can key the new data over the previously entered data or space out the previously keyed data and then key the new data. The change will process and overlay the previously keyed data in overnight batch processing.

**E. Updating Authorized Representative/PACE/CAP Data on Existing Cases – DSS-8125**

1. For an existing case in EIS, if you learn the recipient has an Authorized Representative or is enrolled with PACE or CAP, use the DSS-8125 to enter the data into EIS. Entry of this data will automatically update the Authorized Representative Indicator on the case to "Y" (screen shot H).

For the Authorized Representative, required fields are the name, address, relationship code of the representative to the applicant, and the language preference of the representative.

PAGE NO	** EIS FORM 8125 CONT. **				FORM ID
SG1	SG2			SG3	
SP1	2			3	
PACE/CAP REP				ADDR1	
ADDR2	CTY		ST	ZIP	PH#
AUTHRZED REP				ADDR1	
ADDR2	CTY		ST	ZIP	PH#
NOTICE CODE	SPOUSE	CHILD ONLY	RSN	REL CD	LNG
TX1					
TX2					
TX3					
*****					
*****					
INDIVIDUAL ID				NAME	

**Screen Shot H**

2. If an entry was previously made in the Authorized Representative field and it is learned that the recipient has a new representative or an additional representative with a higher priority than the previously entered representative, key the change on the DSS-8125. During overnight batch processing, the new data keyed will overlay what was previously keyed.
3. If the applicant is enrolled in CAP or PACE, key the data for the CAP Case Manager or PACE Agency. Required fields are the CAP Case Manager name/Pace Agency name, and address. Up to thirty characters may be keyed for the name field.
4. Authorized Representative/PACE/CAP data can be changed at any time and will update overnight in batch processing.

**NOTE:** 8125's that are pending or on hold on August 23, 2010 will be transitioned to the revised 8125. Any Authorized Representative or PACE data keyed on the pending 8125 will be brought forward upon form re-entry.

**F. Deleting Authorized Representative/PACE/CAP – Existing Cases**

1. Use the DSS-8125 to delete the Authorized Representative/PACE Agency/CAP Case Manager from a case in EIS.

Key an \* in the first position of the Authorized Representative first name field or CAP Case Manager/PACE Agency name to remove all data (screen shot I).

PAGE NO	** EIS FORM 8125 CONT. **	FORM ID
SG1	SG2	SG3
SP1	2	3
<b>PACE/CAP REP</b>		ADDR1
ADDR2	CTY	ST ZIP PH#
<b>AUTHRZED REP</b> *ohn Q. Public		ADDR1 1209 Raleigh Rd.
ADDR2	CTY Raleigh	ST NC ZIP 22445 PH#
NOTICE CODE	SPOUSE CHILD ONLY RSN	REL CD A LNG EN
TX1		
TX2		
TX3		
*****		
*****		
INDIVIDUAL ID		NAME

**Screen Shot I**

2. Data will be removed from the case overnight in batch processing.
3. If both the Authorized Representative and PACE/CAP data are removed, EIS will automatically reset the Authorized Representative indicator to "N".
4. At case termination, EIS will delete Authorized Representative data from the case after the notice has been generated. If the individual reapplies for assistance, Authorized Representative/PACE/CAP data must be reentered in EIS.

**G. Transferring AAF Cases**

1. When transferring from AAF Payment Type 1 or 2 to Payment Type 4 or 5, if there is an Authorized Representative, enter the Authorized Representative information on the DSS 8125 in the Authorized Representative Field.
2. When transferring from AAF Payment Type 1, 2 or S to Payment Type 9, if there is an Authorized Representative, enter the Authorized Representative information on the DSS 8125 in the Authorized Representative field.

#### **H. Transferring MAF Cases to AAF**

When transferring from MAF to AAF Payment Type 1, EIS automatically deletes all authorized representative and/or PACE/CAP data.

#### **I. Transferring SA Cases to Medicaid**

When transferring from SAA/SAD to Medicaid, Authorized Representative information can be added, modified or deleted. If Authorized Representative information is already on the case, EIS will retain that information unless it is modified.

### **V. EIS AUTOMATED NOTICES**

#### **A. Caseworker Actions on the DSS-8124 and DSS-8125**

Unless overridden, EIS sends two automated notices: one to the casehead at the case address and one to the Authorized Representative at the address on the Authorized Representative screen.

If PACE or CAP information is available, EIS will also send a notice addressed to the PACE agency or CAP Case Manager at the address keyed for that agency.

#### **B. Piedmont Behavioral Health County Transfer Notices**

Two notices will be sent; one to the casehead and one to the Authorized Representative if there is one.

#### **C. MMA Response File Notices**

Two notices will be sent; one to the casehead and one to the Authorized Representative if there is one. (See EIS-3520, Medicare Entitlement and Enrollment).

#### **D. SSI Approvals**

For new SSI Medicaid recipients not active in EIS, EIS will read the SDX file for Representative Payee and address information. If the data is there, EIS sets the Authorized Representative indicator to Y, and moves the data to the Authorized Representative fields. We are currently using the Authorized Representative address as the EIS case address, therefore one notice will be sent to the casehead name at the Authorized Representative address.

For SSI cases, the caseworker is able to change the Authorized Representative name and address on the DSS-8125 for PLA, LTC and Special Assistance Cases.

#### **E. Non -SSI Becoming SSI**

If there is no Authorized Representative in EIS, EIS will load the information from the SDX. If Authorized Representative information is in EIS, it will not overlay it as we want to keep the data the worker has keyed previously. The Authorized Representative data from the SDX is written to a report in NCXPTR. See Reports below.

#### **F. SSI Denials, TPR Terminations and TPR Denial Notices**

If the individual is in LTC or AAF pay type 4, 5, or SAA, SAD, or HSF, notice will be sent to the address in EIS, and will also go to the Authorized Representative if there is one. Otherwise, the notice will be sent to the address from the SDX which would be the Authorized Representative address if there is one.

#### **G. SSI Termination and Redetermination Notices**

If the individual is in LTC or AAF pay type 4, 5, or SAA, SAD, or HSF, a notice will be sent to the address in EIS, and will also go to the Authorized Representative if there is one. Otherwise the notice will be sent to the address from the SDX which would be the Authorized Representative address if there is one.

#### **H. Auto Term Notices for MIC, Children turning 19, and MQB-E Automated Terminations**

Two notices will be sent, one to the casehead and one to the Authorized Representative if there is one.

#### **I. Automated Reenrollment Forms**

Automated Reenrollment forms will not be sent to the Authorized Representative, PACE agency, or CAP Case Manager.

#### **J. Transitional Quarterly Reporting Forms**

Transitional Quarterly Reporting Forms will not be sent to the Authorized Representative, PACE agency, or CAP Case Manager.



**VI. REPORTS**

- A. For existing SSI cases, if a worker has already entered Authorized Representative data and new information comes in on the SDX, this information will not overlay what the worker has keyed, but will be written to a new report in NCXPTR. The title of the report is: DHREJA AUTH REP FOR SSI MED IND (screen shot J).**

7/15/2010	NC DEPARTMENT OF HEALTH AND HUMAN SERVICES				
PAGE	1	AUTHORIZED REPRESENTATIVE FOR SSI INDIVIDUALS			
	COUNTY	92	DISTRICT	SMc	
CASE ID	INDIV ID	RECIPIENT	NAME	SDX PROC DATE	
88888888	123456789A	CHRISTOPHE	A COLUMBUS	07142010	
	AUTHORIZED REP:	FRED	R FLINTSTONE	III	
	ADDRESS LINE 1:	100 COBBLESTONE RD			
	ADDRESS LINE 2:	APT 21			
	CITY/STATE/ZIP:	BEDROCK	NC	29999	

**Screen Shot J**

- B. This report will run daily, and will include the following data elements:**

1. Individual Name
2. Individual ID
3. Case ID
4. Authorized Representative name and address
5. Date of SDX update

- C. The report will be sorted by county and district number**

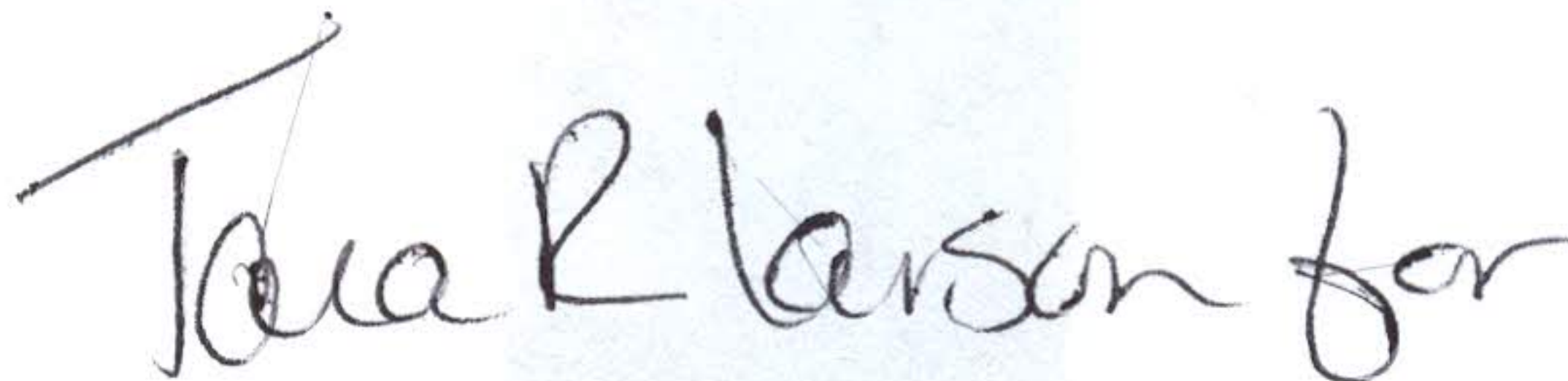
- D. The report will be retained for 1098 days.**

- E. The first report will run the night of Friday, August 27<sup>th</sup>, and will be available in NCXPTR the following day.**

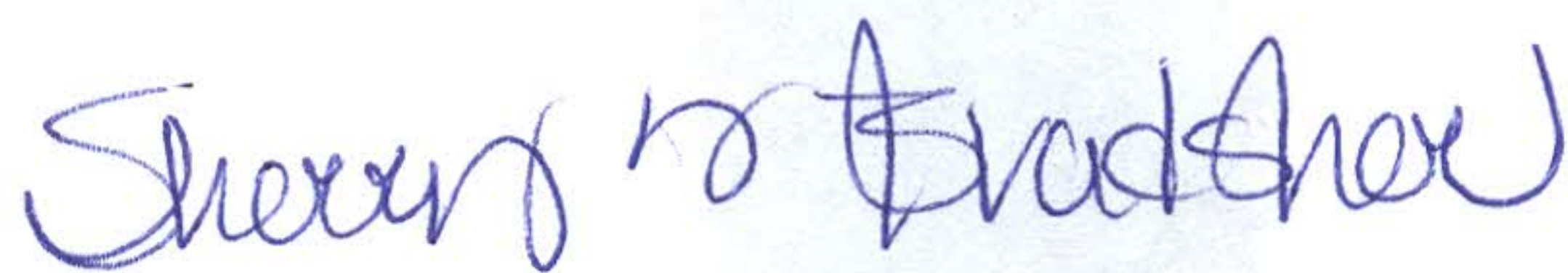
**VII. CLIENT SERVICE DATA WAREHOUSE (CSDW)**

Current and historical Authorized Representative/PACE/CAP data will be stored in the CSDW.

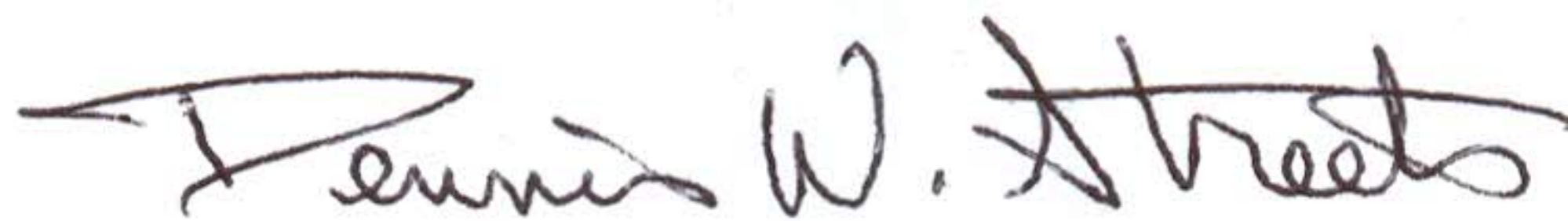
If you have any questions regarding this material, please contact your Medicaid Program Representative.



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