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Procedural Standard 99-16
September 30, 1999

TO: All DES Staff

FR: Susan W. Levine, Associate Director

RE: Procedure for Returning Cases to DTA Based upon MMIS DATA

Purpose:

The purpose of this memo is to clarify the procedures for returning cases to the DTA based upon information obtained from the Medical Management Information System (MMIS).

Background:

When DES receives a disability supplement for an individual on EAEDC or TAFDC, this individual is already receiving benefits through DTA pending our disability determination. This eligibility is reflected on MMIS. Cases are opened and closed frequently by DTA for a variety of reasons including whereabouts unknown and failure to attend an appointment with the DTA social worker.

The procedures for reviewing MMIS eligibility and returning cases to DTA based upon that information are as follows:

Procedure:

When reviewing the MMIS eligibility screen to verify whether the case is opened or closed, it is important to pay close attention to the category of assistance and the dates of opening and closing. Since MMIS retains historical data, it is possible to see multiple eligibility segments for your program type. The EAEDC cases appear as category 04, the TAFDC cases appear as category 02. A case is considered open if the "closed" column does not have a date in it, but rather has 99999 displayed. MMIS displays eligibility segments in descending order newest to oldest.

Do NOT return a case to DTA until you have verified that the date of the case closing is at least 30 days prior to the date you are reviewing the MMIS eligibility screen.

Example:

On March 23rd you check the MMIS eligibility screen and see that your case was closed by DTA on February 27, 1999. You should NOT send this case back to the agency as it has not been closed for at least 30 days from the date you are reviewing MMIS. If the case remains closed until March 28th, 1999 you may then return it to the agency.

The reason for waiting 30 days from the date of closing is that in many instances cases are closed by the agency for whereabouts unknown. When the customer tried to access benefits and is denied, they contact the agency and report their whereabouts (new Address), and the case is reopened retroactive to the original date of closing. For this reason it is imperative that we continue to work a case until we are absolutely sure that it will remain closed. If you are ever unsure of the status of any case, it is best to contact the agency for an update.

If you see a customer has been approved for SSI (supplemental Security Income, category 03) you may return the case to the agency at any time. You do not have to wait 30 days, as the customer is receiving benefits through the Social Security Administration.

Disability Assistants may complete the paperwork to return a case to DTA. A Disability Reviewer's signature is not necessary on this paperwork. Physician Advisors are not required to have their signature on forms.

The following is a list of categories of assistance you will see reflected on MMIS:

- 01- **SSI Aged** Individual over 65 years eligible for SSI
- 02- **TAFDC** Individual eligible for benefits through the TAFDC program.
- 03- **SSI Disabled** Individual eligible for SSI due to a disability
- 04- **EAEDC** Individual eligible for benefits through the EAEDC program
- 05- **MA/Aged>65** Individual over 65 years eligible for Masshealth
- 06- **MA/Families** Individual eligible for Masshealth as a member of a family
- 07- **MA/Disabled** Individual under 65 years eligible for Masshealth due to a disability

Masshealth Health Care Reform Categories:

- 40-49- **Standard** Most comprehensive benefits package
- 50-55- **Commonhealth** Benefits package for disabled children and disabled working adults
- 60-65- **Basic** Fundamental benefits package offered by DMA
- 66-69- **Limited** Illegal Aliens

The following examples should provide you with some guidance when consulting MMIS to verify case status:

EXAMPLES:

Situation	MMIS Shows	Action
An EAEDC case is ready to have a CE booked	The cat 04 case is still open	Continue to work on the case

Situation	MMIS Shows	Action
<p>Case has 2 episodes, an EAEDC and a TAFDC.</p> <p>Cases has 2 episodes EAEDC and MADA and EAEDC is closed for 30 days in MMIS.</p>	<p>The TAFDC case remains open, while the EAEDC case was closed more than 30 days prior to the date your are reviewing MMIS.</p>	<p>Return the EAEDC case to the agency and continue to work on the TAFDC case.</p> <p>Send the EAEDC case back and the MADA case gets reassigned to Team 100 for them to continue the process.</p>
<p>A TAFDC customer calls and asks why he has to go to see another doctor, he is on SSI.</p>	<p>Customer on SSI cat 03.</p>	<p>Need to verify through MMIS or DTA. Do not close on applicant's word alone. Then return to agency.</p>
<p>Mail comes back to us for whereabouts unknown.</p>	<p>MMIS shows same address as we have on file.</p>	<p>Contract agency to see if they have any additional information and if not ask them how they would like case handled. If DTA has same address we have, we review info. on what we have. If we cannot make a decision it goes back whereabouts unknown at that time. If MMIS shows a different address change than what is in DEScovery, either reschedule the appointments if they have passed or resend the appointment letters if the appointment has not yet taken place.</p>

Summary: When reviewing cases on MMIS it is imperative that we make sure that the case will remain in a closed status for at least 30 days before we attempt to return it to the agency.