

**DEPARTMENT OF HEALTH SERVICES**

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November 30, 2001

TO: All County Welfare Directors  
All County Administrative Officers  
All County Medi-Cal Program Specialists/Liaisons  
All County Health Executives  
All County Mental Health Directors

Letter No.: 01-64

**SURVEY TO IDENTIFY COSTS AND BENEFITS OF THE STATE ONLINE QUERY  
(SOLQ) PROJECT**

The purpose of this All County Welfare Directors Letter is to inform counties of a new federal automation project known as SOLQ that will provide on-line access to Social Security Administration (SSA) data that assists the counties in making eligibility determinations for a variety of state programs including Medi-Cal.

**Background**

The SSA developed a pilot project which allowed a few States to access certain SSA information (Title II, Title XVI, and Social Security number (SSN) Validation data) on-line in real time. SSA is now ready to expand this pilot nationwide and has offered California the opportunity to implement on-line access to this data. Currently this data is only available using an overnight batch process. The SOLQ process will enable counties to access this information almost instantaneously.

The Department of Health Services (DHS) and the California Department of Social Services (CDSS) are in the process of reviewing this opportunity to determine if we should participate. As a part of this review, DHS must determine if the use of this on-line SSA data is cost effective before devoting significant resources for its implementation. Feedback from the counties is critical for us to perform the necessary cost benefit analysis. Please complete the enclosed survey and return the responses by Friday, December 7, 2001, to:

Mr. John Zapata  
Medi-Cal Eligibility Branch  
Department of Health Services  
714 P Street, Room 1692  
Sacramento, CA 95814

The survey includes the following broad categories:

1. **Identification of Benefits** – this is needed for the cost benefit analysis.
2. **Potential Usage** – this information will be helpful for both the cost benefit analysis and to ensure that we size this system correctly (for example, have sufficient bandwidth to ensure reasonable response time).
3. **Potential Costs to the County** – this section will describe those county costs that we know about. Please quantify these and identify whether there are other county costs that should be considered.
4. **Potential Solution** – Please tell us if DHS' proposed solution for the implementation and use of this on-line process meet your county's business needs. If not, what else would be required?

#### Next Steps

DHS will review the information provided by counties and will work with the federal SSA to determine if we will implement the SOLQ system in California. We anticipate that we will make that decision by the end of 2001. Counties will be notified via follow-up all county letters if DHS decides to implement the SOLQ system.

Please direct any Medi-Cal policy related questions to Mr. John Zapata at (916) 657-0725. If your questions are of a technical nature, please contact Mr. Marty Bornstein at (916) 657-0798.

Sincerely,

ORIGINAL SIGNED BY

Richard Brantingham  
Acting Chief  
Medi-Cal Eligibility Branch

Enclosure

## State On-Line Query County Survey

Please provide responses to the following questions. This information is necessary for the DHS to determine if the SOLQ process is cost effective for DHS and to provide the SSA with information they need in order to implement SOLQ in California. Responses are due by close of business on Friday, December 7, 2001. Please forward your response to:

Mr. John Zapata  
Medi-Cal Eligibility Branch  
Department of Health Services  
714 P Street, Room 1692  
Sacramento, CA 95814  
Or E-Mail it to: [Jzapata@dhs.ca.gov](mailto:Jzapata@dhs.ca.gov).

### Identification of Benefits

Potential benefits that have been identified in SSA's pilots include the following:

- The ability to get data more quickly than you do via the batch system. (This will be helpful for determining Immediate Need benefits as well as possibly for handling other types of cases [perhaps Appeals or Fraud]);
- The ability to get additional information, such as Railroad Retirement data;
- The ability to solve an ongoing Income Eligibility Verification System (IEVS) problem. In IEVS, if a client has multiple SSA accounts (for example, filed a claim under his own SSN and is part of a claim for a spouse or parent), we can currently only see one set of benefit data. It is our understanding that under SOLQ, we could see the benefit amounts for all the claims.
- Reducing fraud overpayments, and California Work Opportunity and Responsibility to Kids benefits (for example, Illinois found hundreds of cases where the SSA payment was sent to a different address than the address on the application).

In addition, this should improve service to clients by reducing the number of times that clients would need to go to the SSA district office in order to obtain proper documentation or resolve discrepancies.

Please answer the following questions:

1. What are the quantifiable potential benefits that would be achieved in your county?
2. What intangible benefits would be expected?

### **Potential Usage by Your County**

SSA wants us to estimate the potential usage for SOLQ. This will help them with several issues, including determining whether the existing 56 KB data line should be upgraded as well as staffing needs in the SSA district offices. This information will also help us to develop the benefit side of the cost benefit analysis. Please note that SOLQ augments IEVS; it does not replace that interface.

Please answer the following questions:

3. What is the largest number of county staff who would be using this new capability?
4. What is the largest number of SOLQ transactions that you would expect to be sent each month by your county?

### **Potential Costs to the County**

It is our assumption that the SOLQ interface will be incorporated into Medi-Cal Eligibility Data System (MEDS). The benefit is that this will make this interface transparent to the counties. Your staff will not need to sign into SSA's system and more importantly, your county or consortium will not need to modify your county's automated system to use SOLQ. However, the response will be returned as screens so it will not be easy to update your files using SOLQ information.

The obligations of the counties wishing to utilize SOLQ would be as follows:

- Each county that wishes to use this system will need to sign an agreement with SSA. It is not a definite requirement that all counties must use this system but, we believe it will be a greater benefit to all concerned if SOLQ is implemented as a statewide system.
- There is no charge from SSA for using this system.
- If we use MEDS, as the connection to SOLQ the county security coordinator will need to identify which persons are authorized to request SOLQ output and modify the appropriate MEDS security tables.
- SOLQ does not replace IEVS, but merely augments it. This means that counties will get SSA data twice for certain clients.
- The counties will be asked to identify whether there are additional data elements which are not displayed by IEVS that should be in SOLQ, and since there will be multiple screens, may be asked for feedback on which data should be grouped together.

- SSA wants DHS/CDSS to monitor the usage of SOLQ to ensure that every request is for an “active” case. Our plan for complying with request would be to compare the contents of a log file of all SOLQ queries to see whether the clients are known on MEDS or IEVS and ask counties to follow up on exceptions.

Please note that DHS analyzed the possibility of incorporating an upfront check in MEDS which would only allow a user to submit an online query to SSA if the client’s record already exists on MEDS or IEVS. We rejected that approach because it would have precluded the counties ability to make some legitimate SOLQ requests. For example, if the county wished to do a query on a General Assistance/General Relief client, this person’s record may not be found on MEDS or IEVS (unless they were receiving other public assistance benefits) or similarly if the client requested immediate need benefits, the county may wish to do an SOLQ request before the MEDS or IEVS record was established.

Please answer the following question to help us develop the cost side of the Cost-benefit analysis:

5. If we implement SOLQ as described above, the county MEDS security coordinator will need to take the appropriate steps to update the MEDS tables. Are there other county costs that should be considered?

### **County Business Needs**

Please answer the following question:

6. Does the proposed MEDS-based solution meet the business needs for your county? If not, please define the business requirements that would need to be fulfilled for this interface to be useful for your county staff.