

## DEPARTMENT OF HEALTH SERVICES

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February 1, 1996

Letter No.: 96-06

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

## FINAL BURMAN vs. BELSHÉ IMPLEMENTATION LETTER

The purpose of this letter is to transmit information, procedures, reports and screens which are being implemented due to the Burman vs. Belshé lawsuit.

**Background:**

In the past, Medi-Cal beneficiaries received a paper Medi-Cal card for each month in which the beneficiary was eligible. In 1994, the Department of Health Services (DHS) began converting from paper Medi-Cal cards to the plastic Benefits Identification Card (BIC). Using the BIC, a provider can verify the beneficiary's Medi-Cal eligibility through the Point of Service (POS) Network (telephone AEVS, CERTS software, POS device or enhanced provider systems). A new card is no longer issued to every Medi-Cal eligible person on a monthly basis.

One of the advantages of paper cards was that the card itself was proof of eligibility and anything that happened during the month (such as a hold) had no effect on the card's validity. A problem with the new process is the impact of MEDS (Medi-Cal Eligibility Data System) generated holds. These MEDS holds are often caused by edits on data received from counties. Currently, edits within MEDS can cause a system generated hold or termination. When a provider attempts to verify eligibility on a beneficiary that is on a MEDS hold, a message of "no recorded eligibility" (ineligible) is received and services are often refused. In effect the beneficiary will have lost eligibility without the required ten day notice.

The terms of the Burman vs. Belshé settlement include modifying MEDS so that beneficiaries will not have their Medi-Cal eligibility status changed without proper notification (i.e. ten-day notice). ~~In other words, MEDS generated holds and terminations will no longer impact eligibility, eligibility will continue until the county welfare department, resolves the hold/termination or terminates the eligibility with prior notification.~~ County generated holds/terminations are not affected by the new MEDS modifications. DHS will have these modifications completed by the end of January 1996. Because the lawsuit requires the DHS to keep beneficiaries in MEDS generated holds eligible until the county resolves the hold problem, it is extremely critical that the counties work these alerts as expeditiously as possible.

All County Welfare Directors  
All County Administrative Officers  
All County Medi-Cal Program Specialists/Liaisons  
Page 2

### **MEDS GENERATED HOLD ALERT DATABASE**

The DHS has created the "MEDS Generated Hold Alert Database" in response to the Burman vs. Belshé lawsuit. This database will house information related to MEDS generated "holds." For recipients placed in hold by MEDS during the daily update process including reconciliation, this database will include all alerts issued for that recipient in that days update process. For recipients placed in hold by MEDS during Renewal, this database will include all alerts issued for that recipient in that day's update process. Various reports will be generated from this database and will be kept and distributed to the counties. There are no changes to the current process in place for submitting corrections to MEDS. There are no changes to the existing on-line Worker Alert Inquiry (INWA). The daily alert that currently shows on INWA will still remain). The new "Hold Alerts" can still be corrected in the same manner as before. Once a MEDS generated hold status has been resolved, all alerts for that recipient will be removed from the Hold Alert Database.

**BURMAN DAILY DETAIL REPORT** (See attachment I- RS-MED230-R001) Issued on a daily basis, this report includes all persons added to the Hold Alert Database in the previous update process. Sorted by county, district, worker, serial, and fbu (family budget unit). Counties can use this to assist in locating alerts which need to be resolved immediately. The create date from the header of the EW 30 transaction is displayed.

### **MANAGEMENT REPORTS**

**BURMAN MONTHLY SUMMARY REPORT- COUNTY** (See attachment II RS-MED240-R002) Issued monthly, it provides totals by county and district of unresolved alerts created prior to the report month as well as unresolved alerts created during the report month.

**BURMAN MONTHLY SUMMARY REPORT - DISTRICT** (See attachment II RS-MED240-R003) Issued monthly it provides county totals by district and worker of unresolved alerts created prior to the report month as well as unresolved alerts created during the report month.

**BURMAN MONTHLY SUMMARY REPORT WORKER** (See attachment II RS-MED240-R004) Issued monthly, it provides county-district totals by worker and message number of unresolved alerts created prior to the report month as well as unresolved alerts created during the report month.

All County Welfare Directors  
All County Administrative Officers  
All County Medi-Cal Program Specialists/Liaisons  
Page 3

## **BURMAN SCREENS**

**REQUEST FOR HOLD WORKER ALERT INQUIRY** This is the initial screen used to perform an inquiry into the HOLD Alert Database. To access this screen, type 'HOLD' on a blank MEDS screen. This screen can be used to identify records which have been placed in "Hold" alert sorted by county, district, worker and county i.d. Records are returned based on the amount of detail you enter. The specific problem can also be looked up on INWA.

**MEDS ONLINE WORKER ALERT SUMMARY** If the hold was generated as a result of an EW30 transaction, F6 will recall the EW30 transaction. The EW30 screen will be displayed with data from the original transaction filled in. If appropriate, the EW30 transaction can be modified/corrected and resubmitted.

**MEDS ONLINE WORKER ALERT INQUIRY/DETAIL** This screen results from the selection of a record on the worker Alert Summary Screen. If the hold was generated as a result of an EW30 transaction, F6 will recall the EW30 transaction. The EW30 screen will be displayed with data from the original transaction filled in. If appropriate, the EW30 transaction can be modified/corrected and resubmitted.

## **RENEWAL, RECONCILIATION and DAILY**

- \* Currently a person in MEDS hold status will continue to show (799) in pending. The county will now see "Hold" under INQM at top left as **\*\*\*Hold\*\*\*** (highlighted). This **\*\*\*Hold\*\*\*** will display when any or all of the MEDS segments (Primary, Special Program 1 or Special Program 2) are in Hold.
- \* A fix could be accomplished on a hold by bringing up the original EW 30, change fields & resubmit. Adding new eligibility with errors will not be accepted (no change to current policy).
- \* Reconciliation message is not changing (ON MEDS NOT ON COUNTY ) Counties will still get the same reconciliation reports. The MEDS records placed in hold as a result of reconciliation will show up on the Burman Daily Detail Report.
- \* **Edwards remains the same and is not changing.**

All County Welfare Directors  
All County Administrative Officers  
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Page 4

**\* NEW ELIGIBILITY STATUS**

\* To accommodate the Burman Lawsuit, DHS has developed a new eligibility status with an '8' in the second digit ( '8' = Forced eligible from MEDS Hold ). This eligibility status will appear at renewal in the current month and can roll into history.

\* Renewal- A record that is a MEDS generated hold/termination will go to the new 'x81' eligibility status. These records will be on the MEDS Generated Hold Alert Database.

If you have any questions relating to this letter, please call Mark J. Ermac of my staff at (916) 654-0021 or fax at (916)657-3224.

Sincerely,

ORIGINAL SIGNED BY

Frank S. Martucci, Chief  
Medi-Cal Eligibility Branch

Enclosures

REPORT: RS-MED230-R001

RUN DATE: 01/17/1996

STATE OF CALIFORNIA  
DEPARTMENT OF HEALTH SERVICES  
BURMAN DAILY DETAIL REPORT  
RECIPIENTS ADDED TO MEDS HOLD ALERT DATABASE

COUNTY : SIERRA

DISTRICT:

WORKER : KENG

COUNTY ID:

46-88-1541001-9-01

46-14-1541002-9-01

CASE NAME:

RENEWAL ERROR 1001

RENEWAL ERROR 1002

CREATE DATE:

01/16/1996

01/16/1996

MEDS ID:

154-49-1001

154-49-1002

WORKER TOTAL: 2

attachment I

STATE OF CALIFORNIA  
DEPARTMENT OF HEALTH SERVICES  
BURMAN MONTHLY SUMMARY REPORT

COUNTY SUMMARY  
FOR THE MONTH OF JANUARY 1995

COUNTY : ALAMEDA

UNRESOLVED ALERTS  
PRIOR TO 11/21/1995:

UNRESOLVED ALERTS BETWEEN  
11/21/1995 AND 01/16/1996:

DISTRICT	UNRESOLVED ALERTS PRIOR TO 11/21/1995:			UNRESOLVED ALERTS BETWEEN 11/21/1995 AND 01/16/1996:		
	BATCH TOTAL	ON-LINE TOTAL	TOTAL	BATCH TOTAL	ON-LINE TOTAL	TOTAL
DMK	1	0	1	0	0	0
ZZZ	2	0	2	0	0	0
9ZZ	2	0	2	0	0	0

attachment II

PRIOR PERIOD		CURRENT PERIOD	
DISTRICT TOTAL:	5	DISTRICT TOTAL:	0
MED HOLD DATA BASE COUNTY TOTAL		5	

STATE OF CALIFORNIA  
 DEPARTMENT OF HEALTH SERVICES  
 BURMAN MONTHLY SUMMARY REPORT

DISTRICT SUMMARY  
 FOR THE MONTH OF JANUARY 1995

COUNTY : BUTTE  
 DISTRICT :

UNRESOLVED ALERTS  
 PRIOR TO 11/21/1995:

UNRESOLVED ALERTS BETWEEN  
 11/21/1995 AND 01/16/1996:

WORKER	UNRESOLVED ALERTS PRIOR TO 11/21/1995:			UNRESOLVED ALERTS BETWEEN 11/21/1995 AND 01/16/1996:		
	BATCH TOTAL	ON-LINE TOTAL	TOTAL	BATCH TOTAL	ON-LINE TOTAL	TOTAL
BU40	2	0	2	0	0	0
BU53	2	0	2	0	0	0
BU62	2	0	2	0	0	0
BU63	2	0	2	0	0	0
BU68	2	0	2	0	0	0
BU84	2	0	2	0	0	0

attachment II

PRIOR PERIOD  
 WORKER TOTAL: 12

CURRENT PERIOD  
 WORKER TOTAL: 0

MED HOLD DATA BASE DISTRICT TOTAL 12

STATE OF CALIFORNIA  
DEPARTMENT OF HEALTH SERVICES  
BURMAN MONTHLY SUMMARY REPORT

WORKER SUMMARY  
FOR THE MONTH OF JANUARY 1995

COUNTY : ALAMEDA  
DISTRICT : DMK  
WORKER : PCCM

UNRESOLVED ALERTS FOR DATES PRIOR TO 11/21/1995 :

MESSAGE NUMBER	BATCH TOTAL	ON-LINE TOTAL	TOTAL
2502	1	0	1
		TOTAL:	1

UNRESOLVED ALERTS CREATED BETWEEN 11/21/1995 AND 01/16/1996

MESSAGE NUMBER	BATCH TOTAL	ON-LINE TOTAL	TOTAL
2502	1	0	1
		TOTAL:	1



HOLD

\* REQUEST FOR HOLD WORKER ALERT INQUIRY \* BNS 01/11/96

REQUIRED ENTRY: MEDS-ID, OR  
CNTY AND (DIST, OR WORKER, OR SERIAL, OR MEDS-ID, OR CREATE DATE)  
----- FOR HELP - PRESS PF13 -----

COUNTY:            AID:            SERIAL:            FBU:            PERSON:

DISTRICT:

MEDS-ID:

EW:

MSG NO:

CREATION DATE:            (MMDDYY) THRU:            (MMDDYY)

OPTION:            PRESS CLEAR TO QUIT

HOLD

\*\* HOLD ONLINE WORKER ALERT SUMMARY \*\*

COUNTY: MEDS-ID: EW: COUNTY-ID:  
DISTRICT: CREATE DATE: THRU MSG-NO:

=====

DATE TRANS SOURCE MESSAGE-----

ENTER "S" FOR DETAIL SCREEN, "E" TO RECALL THE EW30, OR "T" FOR THE TW30  
OPTION < PRESS PF13 FOR LIST >

HOLD

\*\* HOLD ONLINE WORKER ALERT INQUIRY \*\*

DETAIL

\*\*\* CONFIDENTIAL \*\*\*\*\* MEDICAL HOLD ALERT \*\*\*

TRAN-CODE: SOURCE: CREATE DATE: DIST: EW:  
CASENAME: PERSON-NAME:  
COUNTY-ID: MEDS-ID: BIRTHDATE:

DED DATA-ELEMENT CONTENTS

RECALL: TYPE "E" TO RECALL AN EW30 OR "T" TO RECALL A TW30

OPTION: < PRESS PF13 FOR LIST >