

Determining the System of Record for New Applications **Job Aid**

Purpose and Scope

Cúram SOR (System of Record) has two eligibility systems: HCR (HealthCare Reform) for MAGI cases and CGIS (Cúram Global Income Support) for Non-MAGI, LTC/OSS, and Specialty cases.

As applicants and beneficiaries are transitioned from MEDS SOR to CGIS, **it is important for ALL eligibility workers to identify the correct SOR (System of Record) before processing new applicants/applications.**

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Most Recent Changes

Any changes made to this job aid are listed below to allow you to quickly see what has been modified since you last viewed this document.

Date	Description of Change	Page
2.3.2021	<ul style="list-style-type: none"> Initial Release 	N/A
	<ul style="list-style-type: none"> 	



What to Know Before You Start

Cúram SOR (System of Record) has two eligibility systems: HCR (HealthCare Reform) for MAGI cases and CGIS (Cúram Global Income Support) for Non-MAGI, LTC/OSS, and Specialty cases.

HCR applications appear as Insurance Affordability Application and CGIS applications as Income Support Application.

Applicants and beneficiaries may have applications and cases in both HCR and CGIS HOWEVER, they can only have eligibility in one system (HCR or CGIS). Understanding the system in which they have eligibility is key.

If the primary applicant already exists in Cúram, they should not be registered. Their Person Page (and Person ID) can connect with HCR and CGIS.

Blended Households are households where one household member may be determined, at application, to be eligible for a MAGI product while another family member is eligible for a Non-MAGI, LTC or Specialty product.

If the applicant(s) have more than one pending application, work the pending application in the SOR with the oldest date, and be sure to review both applications for differences in information.

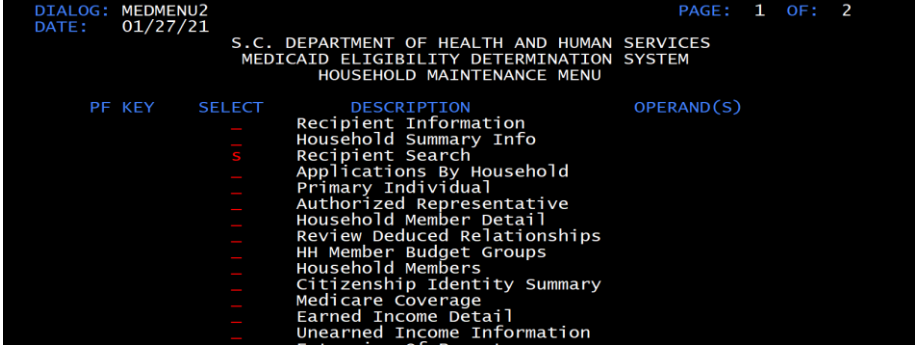
If the pending application date is the same for both systems, then continue with the SOR where the client is currently receiving services, and in Cúram if they are not currently receiving services.

Note: Links in this document only work when the pdf file is open. They do not work from the SharePoint site.

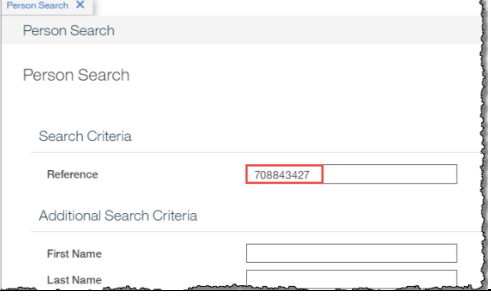
SECTION 1: Search Systems

Eligibility specialist should search MMIS, Cúram and MEDS to determine if the applicant is a current beneficiary.

A. MMIS Retrieval Screen	
Step	Action
1	For each household member , search on the MMIS Recipient Retrieval Screen with the SSN (social security number).
2	<p>The MMIS System of Record (SOR) shows whether an individual's case record is in Cúram or MEDS based on information in the PAT NO: field.</p> <p>a. Where PAT NO: STATE, the SOR is Cúram. The example below indicates the SOR is Cúram and the PCAT is 32.</p> <pre> ZIP: 29053 RSP IND: 0 TPL: N FACIL: HH PAY CAT: 32 PAT NO: STATE DSSDLU: 12/09/20 VA: 0 RACE: 01 BIRTH: 11/29/1949 HHSID: CLM20 HHSDLU: 01/15/99 POV: N ML DEP: 0 SEX: 2 DEATH: 00/00/00 MEDICAID ELIG INELIG PAY Q LS BUYIN-B ST ELIG BUYIN-A ST ELIG CURR: 11/01/20 00/00/00 32 Q CURR: 0000 00/00 00/00 CURR: 0000 00/00 00/00 PRV1: 07/01/94 00/00/00 32 Q PRV1: 0000 00/00 00/00 PRV1: 0000 00/00 00/00 PRV2: 00/00/00 00/00/00 PRV2: 0000 00/00 00/00 PRV2: 0000 00/00 00/00 PRV3: 00/00/00 00/00/00 PRV3: 0000 00/00 00/00 PRV3: 0000 00/00 00/00 PRV4: 00/00/00 00/00/00 PRV4: 0000 00/00 00/00 PRV4: 0000 00/00 00/00 </pre> <p>b. Where PAT NO: is anything else (a worker ID), then SOR is MEDS.</p> <pre> ZIP: 29570 RSP IND: 0 TPL: N FACIL: HH PAY CAT: 32 PAT NO: NAN1702 DSSDLU: 07/13/15 VA: N RACE: 02 BIRTH: 02/06/1953 HHSID: KSS50 HHSDLU: 07/29/11 POV: V ML DEP: 0 SEX: 2 DEATH: 00/00/00 MEDICAID ELIG INELIG PAY Q LS BUYIN-B ST ELIG BUYIN-A ST ELIG CURR: 00/00/00 00/00/00 CURR: 0000 00/00 00/00 CURR: 0000 00/00 00/00 PRV1: 00/00/00 00/00/00 PRV1: 0000 00/00 00/00 PRV1: 0000 00/00 00/00 PRV2: 00/00/00 00/00/00 PRV2: 0000 00/00 00/00 PRV2: 0000 00/00 00/00 PRV3: 00/00/00 00/00/00 PRV3: 0000 00/00 00/00 PRV3: 0000 00/00 00/00 PRV4: 00/00/00 00/00/00 PRV4: 0000 00/00 00/00 PRV4: 0000 00/00 00/00 </pre> <p>c. If there is not a record of the member in MMIS, then a SOR has not yet been established for them.</p> <pre> MMDRSS02 SC DHHS - RECIPIENT INFORMATION 12/10/20 NAME: RECIP #: FAM #: ADDR: SSN: 555443333 MCN/RRN: PRE SSC/MC/RRN SUF MBI: COUNTY: LIV ARR: QUAL CAT: RSP IND: TPL: FACIL: PAY CAT: PAT NO: DSSDLU: VA: RACE: BIRTH: HHSID: HHSDLU: POV: ML DEP: SEX: DEATH: MEDICAID ELIG INELIG PAY Q LS BUYIN-B ST ELIG BUYIN-A ST ELIG CURR: CURR: CURR: PRV1: PRV1: PRV1: PRV2: PRV2: PRV2: PRV3: PRV3: PRV3: PRV4: PRV4: PRV4: PRV5: PRV5: PRV6: PR 0 0 0 MOTHER RECIP# PRV7: AM 0 0 0 PRV8: HH 0 0 0 ESRD: CP 0 0 0 ALT RECIP ID: MH ** NO SSN ON FILE FOR RECIPIENT ** </pre>
3	Make note of the SOR, PCAT AND current eligibility status.
4	Proceed to Step B. MEDS Search.
B. MEDS Search	
Step	Action
1	In MEDS, select the Household Maintenance screen.

2	<p>For each household member, use the Recipient Search and enter the SSN (social security number).</p>
	
3	<p>Enter “s” next to Recipient Search and press Enter. This takes you to the MHS01 screen.</p>
4	<p>For each household member, search by Name and/or DOB (Date of Birth).</p>
5	<p>If the applicant does NOT have active coverage in MEDS, proceed to C. Cúram Person Search.</p>
6	<p>If the applicant has active coverage in MEDS, the application should be processed in MEDS.</p>
7	<p>Proceed to Section 2: Documentation; B. Process in MEDS.</p>

C. Cúram Person Search

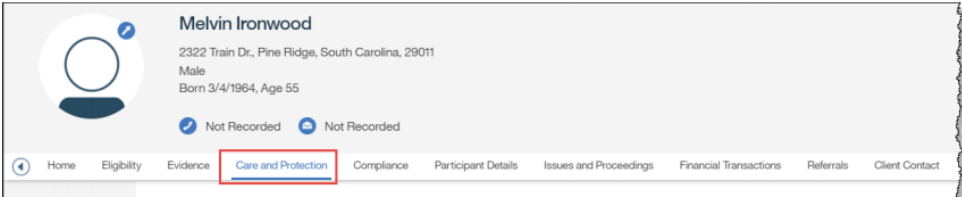
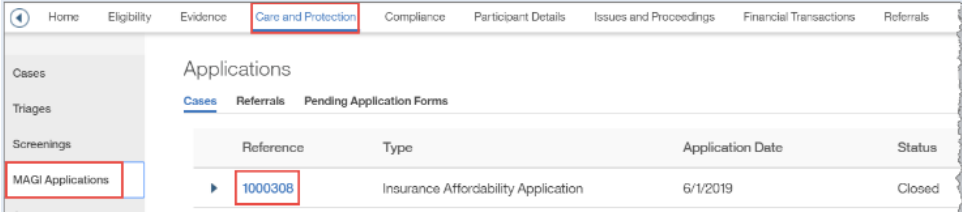

Step	Action
1	<p>In Cúram, from the Home screen, click the “Search for a Person...” link or click on the Cases and Outcomes tab then open the Shortcuts and select Searches then Person.</p> <p>Reference the Search for a Person, Application or Income Support Case in Cúram job aid as needed.</p>
2	<p>For each household member, search using their SSN (social security number).</p>
	
3	<p>For each household member, search using their First Name and Last Name.</p> <ul style="list-style-type: none"> Using just names could return too many results. Adding DOB (Date of Birth) can improve accuracy of the Search. DOB must be entered in mm/dd/yyyy format.
4	<p>If the applicant is found:</p> <p>a. Resolve any duplicates if trained to do so. If not trained, make note of the duplicate records on the Doc Template.</p>



b. Proceed to Step D. Cúram Pending Applications and Cases Search.

- 5 If the applicant(s) is **not found**:
- a. For MAGI and TEFRA applicants, proceed to [Section 2: Documentation, Step D. Process in HCR](#).
 - b. For Non-MAGI Applicants, proceed to [Section 2: Documentation, Step C. Process in CGIS](#).
 - c. For LTC, BCCP, etc., [proceed to Section 2: Documentation, Step B. Process in MEDS](#).

D. Cúram Pending Applications and Cases Search

Step	Action
1	<p>On the Person Page, click the Care & Protection tab.</p> 
2	<p>Click on MAGI Applications to see if there are any <u>pending</u>.</p> <ul style="list-style-type: none"> a. If there are any pending applications, make note of the Date (of Application) and the Status. 
3	<p>Click on Non-MAGI Applications to see if there are any <u>pending</u>.</p> <ul style="list-style-type: none"> a. If there are any pending applications, make note of the Date (of Application) and the Status. 
4	<p>Click on the Cases to see if there is an ACTIVE PDC (Product Delivery Case) or OPEN Integrated Case associated with the person.</p> <ul style="list-style-type: none"> a. Make note of the Start Date and Status for Open and Active. <p>The example below indicates the client has Active Streamlined Medicaid <i>however</i> the more recent Income Support case needs consideration.</p>

Name	Role	Owner	Start Date	Status
Income Support	Primary Client	INTAKE WORKER	12/23/2020	Open
Streamlined Medicaid		[REDACTED]	5/1/2020	Active
Insurance Affordability	Primary Client	[REDACTED]	5/1/2020	Open
Insurance Affordability	Primary Client	State Administration	11/1/2014	Closed

5 If the System of Record (SOR) does not match what is showing in MMIS, then complete a Service Manager ticket correcting the System of Record (SOR), enter the Ticket # on the Documentation Template, as well as in the System of Record.

6 If the SOR is HCR, proceed to [Section 2: Documentation, Step D. Process in HCR.](#)
 For Non-MAGI Applicants and the SOR is CGIS, proceed to [Section 2: Documentation, Step C. Process in CGIS.](#)
 For LTC, BCCP, etc., [proceed to Section 2: Documentation, Step B. Process in MEDS](#)

SECTION 2: Documentation

If the SOR has been confirmed to be the system in which you are working, proceed with processing the case per policy. If the application/case needs to be worked in a different SOR that you process, proceed to the appropriate section below based on the SOR determined.

A. Pending in MEDS <u>and</u> CGIS	
Step	Action
1	If the applicant(s) have more than one pending application, work the pending application in the SOR with the oldest date. If the pending application date is the same for both systems, then continue with the SOR where the client is currently receiving services, and in Cúram if they are not currently receiving services.
2	Proceed to Step B, C or D below based on the SOR determined.
B. Process in MEDS	
Step	Action
1	Once you verified the case should be worked in MEDS, proceed to Step 2.
2	A System of Record Change ticket is required to change the SOR from Cúram to MEDS if needed, even when eligibility is no long active in Cúram.
3	Review the application to determine the appropriate claim type for the Tracking Form using the following guidance. a. Child claiming disability = TEFRA b. Request for Nursing Home, Waiver Services = SSI Institutional c. OSS = OSS d. Breast or Cervical Cancer = BCCP e. DDSN = DDSN

	f. Department of Corrections = Inmate
4	Search OnBase for an existing ACTIVE MEDS-Application Tracking Form. If one does not exist, then create one. Update the keywords on the Tracking Form as follows: <ul style="list-style-type: none"> i. Case Date = date application received ii. Claim Type = SSI Institutional, TEFRA, OSS, DDSN, etc.
5	Close the ACTIVE Tracking Form in OnBase - Do NOT disposition the Tracking Form or place in Follow-up. (The Tracking Form will be served to the appropriate PathOS pathway the next day.)
6	Record the Service Manager ticket number (SMT##) if applicable, and actions taken in the SOR Notes and on the Documentation Template.
7	Pend the PathOS task if applicable
C. Process in CGIS (Non-MAGI Only)	
Step	Action
1	Once you have verified the case should be worked in CGIS, proceed to Step 2.
2	A System of Record Change ticket is not needed when changing from MEDS to Cúram.
3	Search OnBase for an existing ACTIVE MEDS-Application Tracking Form. If one does not exist, then do not create one. If one does exist, update the keywords on the Tracking Form as follows: <ul style="list-style-type: none"> i. Case Date = date application received ii. Claim Type = Non-MAGI CGIS
4	Record actions taken in the SOR Notes and on the Documentation Template.
5	Pend the PathOS task if applicable.
D. Process in HCR	
Step	Action
1	Once you have verified the case should be worked in HCR, proceed to Step 2.
2	A System of Record Change ticket is not needed when changing from MEDS to Cúram.
3	Search OnBase for an existing ACTIVE MEDS-Application Tracking Form. If one does not exist, then do not create one. If one does exist, then update the keywords on the Tracking Form as follows: <ul style="list-style-type: none"> i. Case Date = date application received ii. Claim Type = FI, PW, etc.
4	Record actions taken in the SOR Notes and on the Documentation Template.
5	Pend the PathOS task if applicable.
END	

Title: Determining the System of Record for New Applications

System: Cúram and MEDS

Type: Desk Aid
