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**To:** Eligibility Field Services – Regional Directors  
Eligibility Field Services - Program Managers  
Eligibility Field Services Supervisors  
Regional Attorneys  
Hearings Officers

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**Subject:** **1. Authorized Representatives and Alternate Payees for Independent Children**  
**2. Social Security Administration/Bureau of Vital Statistics Death Match Processing**

This bulletin is being sent to supervisors and other regional managers. Supervisors must share this information with all Texas Works staff. Please ensure copies are provided to staff that do not have access to e-mail. If you have any questions regarding the policy information in this bulletin, follow regional procedures. Active bulletins are posted on the Texas Works Handbook (TWH) website at <http://www.dads.state.tx.us/handbooks/TexasWorks/>.

## **1. Authorized Representatives and Alternate Payees for Independent Children**

### **Background**

An authorized representative may apply for Texas Works programs on a household's behalf, but does not receive or monitor the benefits or services for the household and is not allowed to make managed care choices. An alternate payee may receive or monitor the benefits or services for a household, when an individual is unable or ineligible to receive them, and is allowed to make managed care choices on behalf of the household. Types of alternate payees include a court appointed guardian or an individual that has power of attorney.

### **Current Policy/Process**

Texas Works applications do not capture information for an alternate payee. The applications only capture information for an authorized representative. When an application is received for an independent child and identifies an authorized representative, the authorized representative is not allowed to make managed care choices, such as selection of health plans, on behalf of the independent child. An alternate payee has the authority to make health plan choices on behalf of an independent child.

## **New Policy/Process**

When a Medicaid application is received for an independent child who is also designated as the case name and an authorized representative is identified on the application, the advisor must enter the authorized representative as both the authorized representative and the alternate payee in the applicable Texas Integrated Eligibility Redesign System (TIERS) pages.

Note: The advisor must select “Representative Payee” as the alternate payee type on the Alternate Payee – Details page.

## **Effective Date**

The policy change is effective June 1, 2012.

## **Handbook**

The handbook will be updated with the July 2012 revision.

## **Automation**

No automation changes are required.

## **Training**

There is no additional training requirement; however, staff may refer to instructions in the “Two Minute Tip: Authorized Representative vs. Alternate Payee” to add or modify an alternate payee. Two Minute Tips may be accessed from the Eligibility Support section of the Training and Curriculum web page at: [http://ofs.hhsc.state.tx.us/TAC/ES-ASK\\_Materials.aspx](http://ofs.hhsc.state.tx.us/TAC/ES-ASK_Materials.aspx).

## **2. Social Security Administration/Bureau of Vital Statistics Death Match Processing**

### **Background**

In response to an audit conducted by the Office of Inspector General of the United States Department of Health and Human Services on Medicaid payments for services claimed to have been rendered to deceased Medicaid recipients, HHSC will begin updating denied Texas Works (TW) and Medicaid for the Elderly and People with Disabilities (MEPD) Eligibility Determination Groups (EDGs) with the date of death information.

### **Current Policy/Process**

The Texas Health and Human Services Commission Office of Inspector General (OIG) receives reports from the Social Security Administration (SSA) and the Bureau of Vital Statistic (BVS) of individuals who are reported to be deceased. The OIG staff matches these reports to TIERS eligibility files. Once a match is found and OIG staff determines case action is needed, form

H1186, OIG Match Alert, is completed and sent to eligibility staff for case action. Eligibility workers process the case action, complete form H1186, document in TIERS Case Comments the action taken and submit the completed form H1186 for imaging into the case record. These actions are performed on EDGs with active/ongoing benefits. No action, by either OIG or HHSC staff, is taken for denied EDGs.

### **New Policy/Process**

- OIG will continue to perform the system match of deaths reported by BVS and SSA with individuals in TIERS.
  - OIG will now send Date of Death (DOD) match information for active **and** inactive TIERS individuals directly to TIERS.
  - TIERS will receive and update the TIERS individual DOD information for all active and inactive individuals. Mass Update (MU) process occurs and will either:
    1. Deny single household member cases using the (perfect) BVS DOD data match information. In these cases, the MU will:
      - Populate the DOD within the individual Data Collections page;
      - Set the verification source to “BVS record/death certificate;” and
      - Run EDBC and take the appropriate TIERS case action to deny benefits, if the case is active and in ongoing mode.
- Or
2. Create and route an appropriate DOD Action Alert Task List Manager (TLM) task due to non-perfect match, any mode other than ongoing mode, or the deceased is the Head of Household for eligibility staff case action processing.

Eligibility staff case action processing is also being automated. When the MU process is unable to take TIERS case action, TIERS will trigger a DOD Action Alert TLM task requesting eligibility staff to process the DOD data match in TIERS for all active and inactive cases:

**Alert 810 – Process a Date of Death with a Perfect Match for Individual: X (where X is the individual ID).** This occurs when TIERS receives a record that exactly matches a TIERS individual, and the case is currently being worked (is in a mode other than ongoing), or the deceased is the Head of Household.

**Alert 811 – Process a Date of Death with a Non-Perfect Match for Individual: X (where X is the individual ID).** This occurs when TIERS receives a death record for an individual who seems to match a TIERS individual, but doesn't match exactly.

### *Data Integrity (DI) Staff DOD Data Match Process for Denied EDGs*

DI will receive a DOD Action Alert TLM task if the request is received directly from OIG. DI will verify the information and update the case/EDG with the correct date of death.

**Alert 812 – Verify discrepancy in Date of Death for Individual: X (where X is the individual ID).** This occurs when TIERS receives a record that exactly matches a TIERS individual, but the Date of Death (DOD) does not match the DOD already in TIERS.

#### *SSA DOD Data Matches*

Because the DOD information received from SSA is not an acceptable source of valid verification, eligibility staff will:

- Review the DOD data match information and TIERS case;
- Document the needed DOD action in TIERS Case Comments; and
- Pend the case using existing Questionable Household Composition Verification Checklist (VCL) to issue Form H1020 or initiate contact with authorized representative/family member.

#### *TIERS Case Comments*

This change eliminates the use of the form H1186 process. Eligibility workers must document in TIERS Case Comments which of the following actions were taken:

- Benefits denied effective \_\_\_\_\_.
- Benefits lowered from \$\_\_\_\_\_ to \$\_\_\_\_\_ effective \_\_\_\_\_.
- Benefits raised from \$\_\_\_\_\_ to \$\_\_\_\_\_ effective \_\_\_\_\_.
- Benefits sustained. Reason:  
\_\_\_\_\_.
- Benefits already denied effective \_\_\_\_\_.
- Food benefit certification period was shortened effective \_\_\_\_\_. The original period was \_\_\_\_\_ through \_\_\_\_\_.

Process the change for the reported death for all associated EDGs, if appropriate. Complete the Overpayment Referral page for any overpayments.

#### **Effective Date**

This process is effective April 28, 2012 with implementation of release 84.

## **Training**

A Web Based Training (WBT) is available in PALMS within the Release 84 General Changes Module, Lesson Four.

## **Handbook**

The handbook will be updated with the October 2012 revision.