

Los Angeles County

## **START-ODS**

System Transformation  
To Advance Recovery  
and Treatment



# **Documenting Changes in Financial Eligibility Status**

Sage Patient Management System:  
Services, Data, and Claims

January 2021 | Version 1.0

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## Documenting Changes in Financial Eligibility Status

Updated January 2021

This job aid outlines the process, for both Primary and Secondary Sage Users, used to change a patient’s financial eligibility status as the situation arises. This workflow depends on identifying what the current financial status is and how it will be changed. Identifying Drug Medi-Cal (DMC), My Health LA (MHLA) or other select County programs eligible patients minimizes barriers to treatment. Providers are required to verify patient benefits enrollment at admission and on monthly basis; and for those who do not have current benefits assist in applying for DMC or MHLA. This job aid covers the following situations:

1. Patients who initially admitted as Applying for Medi-Cal/MHLA, then become Medi-Cal/MHLA enrolled;
2. Patients who initially admitted as Medi-Cal/MHLA enrolled, then lose their benefits during treatment;
3. Patients who are admitted as other County Funding enrolled or MHLA and;
4. Patients who initially admitted as Self-pay, then become Medi-Cal, MHLA or other County Funding enrolled.

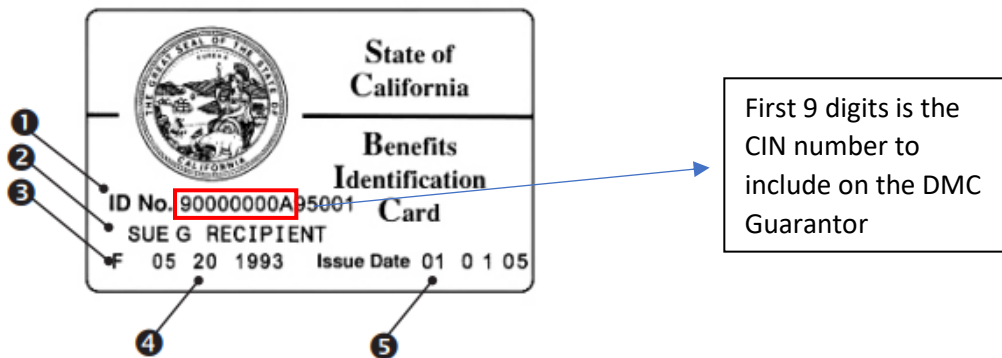
### Verifying Medi-Cal Eligibility

Providers are required to verify Medi-Cal eligibility prior to admission and at the beginning of every month. A record of this verification must be kept on file either within Sage or at the agency. All Medi-Cal certified providers can conduct this verification using one of the following processes:

1. Real-Time 270 Eligibility Request within Sage (Provider Manual Requirement)
2. Automated Eligibility Verification System (AEVS)
3. Point of Service (P.O.S.) device
4. DHCS Medi-Cal eligibility transaction

The Real-Time 270 Eligibility Request form is required per Provider Manual 5.0 and should be used as the primary method to verify initial and monthly eligibility. The Real-Time 270 request requires a DMC guarantor to be entered on the Financial Eligibility form with a Subscriber Client Index Number (CIN) entered. The CIN is listed on the Medi-Cal Beneficiary Identification Card (BIC) and is the first 9 digits of the “ID No.” starting with a 9 and ending with a letter (see image of BIC below).

If providers do not have the CIN, they may need to use one of the other methods listed above to obtain the CIN and input on the DMC guarantor.



Actual card size = 3-1/8" x 2-3/8"; white card with blue letters on front, black letters on back.

Beneficiary Information on face of card:

- ❶ Your ID Number  
(a 14 character Identification number)
- ❷ Your name
- ❸ Gender Code (male or female)
- ❹ Date of Birth
- ❺ Date card was issued to you

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For more information about obtaining access to Medi-Cal related verification systems, please call the Medi-Cal Telephone Service Center (TSC) at 1-800-541-5555 or visit <https://www.medi-cal.ca.gov/>.

For instructions on the Real-Time 270 Eligibility Request, please visit the SAPC website and view the [January 29, 2019 Provider meeting](http://publichealth.lacounty.gov/sapc/NetworkProviders/pm/012919/SageUpdatesPresentation.pdf). Click the link below to access the PowerPoint slides <http://publichealth.lacounty.gov/sapc/NetworkProviders/pm/012919/SageUpdatesPresentation.pdf>.

Please click this link to access instructions for utilizing the Real-Time 270 Eligibility Request. <http://publichealth.lacounty.gov/sapc/NetworkProviders/pm/012919/SageMediCalEligibilityVerificationRealTimeProcessUserGuide.pdf>.

## Patients Who Obtain Benefits During Treatment

SAPC currently allows up to 30 days of reimbursable treatment at admission only per patient per year while providers assist patients in applying for benefits or transferring Medi-Cal to LA County. This policy does not apply to patients who lose their benefits during treatment and are working to be reinstated. Patients whose current Medi-Cal is assigned to a different county (not LA County) are treated the same as “Applying for Medi-Cal” within Sage and should be indicated as such. Patients who are “Applying for Medi-Cal” (or transferring Medi-Cal county to LA) need to have this indicated on their Financial Eligibility with a primary guarantor of “Applying for Medi-Cal” and a secondary guarantor of “LA County-Non DMC” as seen in Figure 1 below. SAPC has noted a large number of state denials related to providers entering DMC as the primary guarantor for patients with out of county Medi-Cal. To avoid unnecessary denials, it is very important to utilize “Applying for Medi-Cal” for all patients whose Medi-Cal is assigned to another county.

Guarantor Selection	
Change Order	Guarantor Name
↓ ↑	Applying for Medi-Cal
↓ ↑	LA County - Non DMC
<div style="display: flex; align-items: center;"> <span style="border: 1px solid black; padding: 2px;">-- Guarantors --</span> <span style="margin-left: 10px;">▼</span> <span style="margin-left: 20px; background-color: #800000; color: white; padding: 2px 10px; border-radius: 3px;">Add Guarantor</span> </div>	

Figure 1: Applying for Medi-Cal

During the course of treatment, providers must assist the patient in applying for Medi-Cal, either in person at a local DPSS office, through the Customer Service Center 899-613-3777, or via the [Your Benefits Now \(YBN\)](#) portal.

Once the patient is officially enrolled in Medi-Cal, providers must immediately update their Financial Eligibility in Sage by adding the DMC guarantor with the effective date of Medi-Cal. Providers need to also update the “Applying for Medi-Cal” guarantor with the “Coverage Expiration Date” to the day before Medi-Cal was effective (Figure 2).

<b>Coverage Expiration Date</b>	05/31/2020
<b>Effective Date Of Contract</b>	01/01/2000

Figure 2: Coverage Expiration Date for Applying for Medi-Cal After Benefits Acquisition

The “DMC Medi-Cal” guarantor must be added and set as the primary guarantor using the “Change Order” arrows to move “California Department of Alcohol and Drugs” to the top of the list order (Figure 3). Providers must ensure the “**Coverage Effective Date**” (Figure 4) within the guarantor details corresponds to the same date the Medi-Cal benefits became effective. This information is available on the benefits card or the notification sent to the patient. It is recommended that the patient apply online through the YBN portal so that any needed information can be accessed online easily.

Guarantor Selection	
Change Order	Guarantor Name
↓ ↑	CALIFORNIA DEPARTMENT OF ALCOHOL AND DRU
↓ ↑	LA County - Non DMC
↓ ↑	Applying for Medi-Cal
-- Guarantors --	<input type="button" value="Add Guarantor"/>

Figure 3: Benefits Acquired During Treatment

<b>Coverage Effective Date</b>	06/01/2020
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Figure 4: DMC guarantor Coverage Effective Date - Reflects first date of active coverage

Additionally, DMC guarantors must have a policy number AND a Subscriber Client Index Number (CIN) listed on the guarantor details page (figure 5). SAPC recommends using the CIN for both the policy number and CIN fields.

<b>Subscriber Policy Number</b>	90000000A
<b>Subscriber Medicaid #</b>	
<b>Subscriber Client Index #</b>	90000000A

Figure 5: Policy and CIN#- Guarantor Details

Patients may also enter treatment as other County Funding enrolled (AB 109, JJCPA, Drug Court, etc.) or eligible for MHLA benefits and apply at the time of admission similar to Applying for Medi-Cal. However, since there is no “Applying for MHLA” option as a guarantor, providers should list this as “LA County-Non DMC” only.

MHLA applications are typically processed much quicker than DMC applications, sometimes within a few days of application. Providers may decide to wait before entering the Financial Eligibility or submitting an authorization until the application is approved and an MHLA number is assigned. This could avoid having multiple authorizations for the same treatment episode.

Providers must identify and update the Cal-OMS Admission information as needed to include the relevant Funding Program information (see figure 6).

CIN <input type="text"/>	<b>Other Funding Programs (Choose all that apply)</b> <input type="checkbox"/> Juvenile In Custody Probation Camp <input checked="" type="checkbox"/> My Health LA <input type="checkbox"/> None <input type="checkbox"/> Perinatal Service <input type="checkbox"/> Private Pay <input type="checkbox"/> Probation / Day Reporting Center <input type="checkbox"/> Probation JJCPA <input type="checkbox"/> Probation Title IV E <input type="checkbox"/> Prop 47 <input type="checkbox"/> Prop 57 <small>Ctrl+click to choose multiple items If Medi-Cal beneficiary is "Yes" or "Pending", My Health LA cannot be selected</small>
Probation PDJ Number <input type="text"/>	CalWORKs Case Number <input type="text"/>
Please select camp: -Please Choose One- <input type="button" value="v"/>	Other Camp (Specify): <input type="text"/>
General Relief Case Number <input type="text"/>	DCFS Case Number <input type="text"/>
Drug Court Case Number <input type="text"/>	AB 109 Case Number <input type="text"/>
AB 109 PB Number <input type="text"/>	CalWORKs Recipient <input type="button" value="No"/> <input type="button" value="v"/>
Substance Abuse Treatment Under CalWORKs <input type="button" value="No"/> <input type="button" value="v"/>	What is your My Health LA Participant ID (13 digits)? <input type="text"/>
Please select MHLA medical home provider/clinic: -Please Choose One- <input type="button" value="v"/> *	Is the client in or being admitted to Recovery Bridge Housing? <input type="button" value="No"/> <input type="button" value="v"/>

Figure 6: Entering Other Funding Programs or MHLA Information on Cal-OMS Admission

## Patients Whose Benefits Expired During Treatment

Throughout treatment, providers may encounter situations where the patient was admitted to treatment with active DMC, MHLA or other county funding, which was verified at admission, but lose coverage during treatment.

Providers should NOT discharge these patients once they become aware of the loss of benefits. Providers should make every effort to assist the patient with regaining their benefits. If that is not possible, providers must make appropriate referrals and ensure, to the best of their ability, the patients are transferred to an appropriate treatment provider.

Please refer to the most current Provider Manual on situations in which SAPC may be able to reimburse providers, when patients lose either DMC, MHLA or other county funding. The 30-day applying for benefits policy does not apply to losing benefits and reapplying during treatment. Providers are only eligible to utilize this policy upon admission to a program.

After it is confirmed that a patient has lost their benefits, providers must immediately update the Financial Eligibility form before submitting any additional claims. Providers will do this by entering a "Coverage Expiration Date" in the DMC guarantor details page (see figure 7).



Coverage Information	
<b>Eligibility Verified</b> <input checked="" type="radio"/> Yes - Y <input type="radio"/> No - N	<b>Coverage Effective Date</b> <input type="text" value="12/01/2017"/>
<b>Coverage Expiration Date</b> <input type="text" value="06/30/2020"/>	<b>Inhibit Billing By Mail</b> <input type="radio"/> Yes - Y <input type="radio"/> No - N
<b>Effective Date Of Contract</b> <input type="text" value="01/01/2000"/>	<b>Expiration Date Of Contract</b> <input type="text"/>

Figure 7: Adding Coverage Expiration Date for DMC Guarantor with Last Date of Active Coverage

If Medi-Cal was the only available funding (patient does not qualify for other county funding), only adding the “Coverage Expiration Date” would be necessary. Please note the provider will not be reimbursed for services rendered during the time the patient is without benefits.

However, if the patient has additional funding sources through Other County partners (other than MHLA), such as AB 109, Drug Court, JJCPA, or PSSF-TLFR, providers would need to ensure the Cal-OMS Admission form includes all necessary information for all applicable county partners (see figure 8).

Admission Data	
<b>Proposition 36 Participant?</b> <input type="text" value="No"/>	<b>Source of Referral</b> <input type="text" value="12 Step Mutual Aid"/>
<b>Days Waited to Enter Treatment</b> <input type="text" value="1"/>	<b>Number of Prior Episodes</b> <input type="text" value="1"/>
<b>Is the client a Medi-Cal beneficiary (eligibility determined)?</b> <input type="text" value="No"/>	<b>Application Submit Date</b> <input type="text"/>
<b>CIN</b> <input type="text"/>	<b>Other Funding Programs (Choose all that apply)</b> <input type="text" value="AB109"/> <input type="text" value="Adult Drug Court"/> <input type="text" value="CalWORKS"/> <input type="text" value="CalWORKS (API)"/> <input type="text" value="CalWORKS Detox"/> <input type="text" value="CalWORKS Family Solution Center"/> <input type="text" value="DCFS-PSSF (TLFRG)"/> <input type="text" value="Family Dependency Drug Court"/> <input type="text" value="General Relief"/> <input type="text" value="Juvenile In Custody Probation Camp"/> <small>Ctrl+click to choose multiple items If Medi-Cal beneficiary is "Yes" or "Pending", My Health LA cannot be selected</small>
<b>Probation PDJ Number</b> <input type="text"/>	<b>CalWorks Case Number</b> <input type="text"/>
<b>Please select camp:</b> <input type="text" value="-Please Choose One-"/>	<b>Other Camp (Specify):</b> <input type="text"/>
<b>General Relief Case Number</b> <input type="text"/>	<b>DCFS Case Number</b> <input type="text"/>

Figure 8: Cal-OMS Admission Fields Reflecting Other County Funding Partners

For patients who lost their DMC coverage and whose services will now be claimed to a county partner, the Financial Eligibility form should be updated as well to change the order of the guarantors. “LA County-Non DMC” should now be the primary guarantor until Medi-Cal is reactivated as seen in Figure 9. Once reactivated, providers should follow the steps above related to when benefits are established during treatment.

Guarantor Selection	
Change Order	Guarantor Name
↓ ↑	LA County - Non DMC
↓ ↑	CALIFORNIA DEPARTMENT OF ALCOHOL AND DRU
-- Guarantors --	<b>Add Guarantor</b>

Figure 9: Correcting Primary and Secondary Guarantors order when patient loses DMC.

For patients who lose their MHLA coverage, there will only be one guarantor listed. If there is no other county funding partner to claim to, the same process should occur where the “Coverage Expiration Date” (see figure 10) is entered in the guarantor details page to reflect the known expiration date. Providers should contact the patient’s medical home or visit the DHS website at <http://dhs.lacounty.gov/wps/portal/dhs/mhla> to assist the patient with reinstating their MHLA coverage.

Coverage Information	
<b>Eligibility Verified</b> <input checked="" type="radio"/> Yes - Y <input type="radio"/> No - N	<b>Coverage Effective Date</b> <input type="text" value="12/01/2017"/>
<b>Coverage Expiration Date</b> <input type="text" value="06/30/2020"/>	<b>Inhibit Billing By Mail</b> <input type="radio"/> Yes - Y <input type="radio"/> No - N
<b>Effective Date Of Contract</b> <input type="text" value="01/01/2000"/>	<b>Expiration Date Of Contract</b> <input type="text"/>

Figure 10: MHLA Guarantor Selection and “Coverage Expiration Date” for Loss of MHLA Benefit

## Patients Who Are Admitted Under Other County Funding or MHLA

Patients are eligible for full scope of the SUD treatment benefits if they are enrolled in either MHLA or other county funding partners. These partners include, but are not limited to, AB 109, JJCPA, PSSF-TLFR, DHCS WCRTS (Residential Service providers only), and Drug Court. Providers must include any relevant case numbers, or policy numbers for each corresponding program(s) on the Cal-OMS admission form. As such, providers should accept these patients into treatment the same as those patients with Drug Medi-Cal.

For those patients, enrolled in one or more of the above-mentioned programs or MHLA, providers should complete the Financial Eligibility using only the “LA County-Non DMC” guarantor as shown in figure 11 below.

Guarantor Selection	
Change Order	Guarantor Name
↓ ↑	LA County - Non DMC
<input type="text" value="-- Guarantors --"/>	<input type="button" value="Add Guarantor"/>

Figure 11: LA County-Non DMC as sole guarantor

Additionally, when completing the guarantor information, SAPC has previously instructed providers to use “N/A” in the policy field when “LA County-Non DMC” is the only guarantor. When applicable, providers are also able to enter the name of the primary program the patient is enrolled in, such as “MHLA”, “AB109”, “JJCPA” etc. as seen in figure 12 below. Providers may also utilize the comments section on the Financial Eligibility main page for additional information on eligible programs.

<b>Subscriber Policy Number</b> <input type="text" value="MHLA"/>
<b>Subscriber Medicaid #</b> <input type="text"/>
<b>Subscriber Client Index #</b> <input type="text"/>

Figure 12: Program Name Entered in Policy Field for Non-DMC Programs

If providers are assisting the patient obtain DMC benefits, then providers should also include the “Applying for Medi-Cal” guarantor. This would follow the section in this aid, or the separate document titled “Updating Financial Eligibility for Patients Who Obtain Benefits During Treatment.”

## Patients Who Are Admitted as Self-Pay and Later Establish Benefits

Providers are able to accept patients who were initially admitted to an agency under Self-Pay, where the patient is fully responsible for payment to the provider for services rendered. These patients cannot be eligible for Medi-Cal or any other county funding at the time of admission to be considered for Self-Pay. For these patients, providers are not required to enter anything other than a Cal-OMS Admission and Discharge into Sage. SAPC is not responsible for authorizations or overseeing the care of any patients who are fully Self-Pay. However, if during the course of treatment, the patient becomes Medi-Cal, MHLA or other County funding partner enrolled, the patient then needs to be fully entered into Sage with a corresponding authorization.

Providers will need to complete the Financial Eligibility, Provider Diagnosis (ICD-10), Authorization Request, and other forms/documentation as any other SAPC patient. Additionally, in some cases the Medi-Cal is retroactive, where patients may have already paid for those services. Providers must refund the self-paid amounts that can be billed to Medi-Cal and upload the receipt that the funds have been refunded prior to billing SAPC. Providers should follow the same steps as above for updating the Financial Eligibility when patients establish benefits during treatment.

For accuracy in the record, the Self-Pay guarantor should be added with the exact “Coverage Effective Date” and “Coverage Expiration Date” that corresponds to the period of self-pay as the last guarantor. If the patient enrolls in Medi-Cal, then the primary guarantor would be DMC, followed by “LA County-Non DMC”, then followed by Self-Pay. If enrolling in MHLA or other county funding, then the primary guarantor would be “LA County-Non DMC”, followed by Self-Pay.

The dates for the primary guarantor should not overlap with the dates of Self-Pay. Meaning, the Self-Pay guarantor should end prior to the effective date of the primary guarantor.