



Department of Human Resources
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FIA ACTION TRANSMITTAL

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**TO: DIRECTORS, LOCAL DEPARTMENT OF SOCIAL SERVICES
DEPUTY/ ASSISTANT DIRECTORS FOR FAMILY INVESTMENT
FAMILY INVESTMENT SUPERVISORS**

**FROM: ROBERT EVERHARD, EXECUTIVE DIRECTOR, FAMILY INVESTMENT
ADMINISTRATION** *Robert Everhard*

**RE: MODIFICATION OF SSI/SDX ACCRETION, DELETION AND CHANGE
PROCESSING**

PROGRAM AFFECTED: SSI MEDICAL ASSISTANCE

**ORIGINATING OFFICE: ADMINISTRATIVE SERVICES AND CONTINUOUS
IMPROVEMENT**

SUMMARY

Since 1974, the local Departments of Social Services have used Form DHR/DDP950, Supplemental Security Income, to process SSI and SDX additions, deletions and changes of information to the Maryland MEDICAID Information System (MMIS). Effective April 1, 2000, FIA will replace Form 950 with automated processing via the on line State Data Exchange (SDX) system. The 950 forms will not be sent to the local department offices after April 30, 2000.

The SDX Committee developed this new process, with input from the local departments, FIA Central, the Office of Information Management (OIM) and the Department of Health and Mental Hygiene (DHMH). This automated methodology will decrease the time required to process SSI information to MMIS via CARES, increase data accuracy, and enhance user productivity.

On August 22, 1997, DHR implemented the state Verification Exchange System (SVES) statewide. SVES is an automated data exchange system with the Social Security Administration (SSA) for verifying social security numbers, Title II Social Security benefits, Title XVI Supplemental Security Income (SSI) benefits, and Quarters of Coverage History (QCHS).

The SDX component is a principal element of SVES. This on-line system allows FIP case managers and other designated users to select and view customer information regarding SSI application and payment history. Recent changes to the SDX system automates the tracking of SSI information necessary for adding individuals to, making changes to and removing individuals from Federal Medical Assistance.

The attached SDX update to the SVES manual replaces the SDX section of the manual sent with Action Transmittal FIA/OPRS#00-06 dated August 13, 1999. This revision, beginning on Page 68, contains the information required to access the SDX screens and assist the user in processing required SSI information to MMIS via CARES. The sections dealing specifically with accretions (additions), deletions and changes begin on Page 91.

The accretion, deletion and changes screens will be available for use beginning February 28, 2000 on a voluntary basis.

ACTION REQUIRED, EFFECTIVE APRIL 30, 2000:

1. Review the SDX Accretion lists on a daily basis (refer to instructions in the SVES manual beginning on Page 91). Take corrective action on Accretion list items in MMIS via CARES. Completed items will drop from the Accretion lists only when MMIS is updated.
2. Review the SDX Closing lists on a daily basis (refer to instructions in the SVES manual beginning on Page 97). Take corrective action on Closing list items in MMIS via CARES. Completed items will drop from the Closing lists only when MMIS is updated.
3. Review the SDX Change lists on a daily basis (refer to instructions in the SVES manual beginning on Page 101). Take corrective action on Change list items in MMIS via CARES. Once completed, workers must manually delete Change list items.
4. Replace the SVES Manual Cover under Action Transmittal FIA/OPRS#00-06 with the attached revision.
5. Replace the SVES manual Table of Contents Page ii under Action Transmittal FIA/OPRS#00-06 with the attached revision.
6. Insert the SVES manual Table of Contents Page iii in this revision behind Table of Contents Page ii.
7. Replace Page 2 in the SVES manual under Action Transmittal FIA/OPRS#00-06 with the attached revision.
8. Replace Pages 68 through 89, inclusive, in the SVES manual under Action Transmittal FIA/OPRS#00-06 with the balance of the attached revised SDX update, Pages 68 through 110, inclusive.

REMINDER: Case managers need to take actions within 20 days of line items appearing on the Accretion, Closing and Change lists to be in compliance with DHR timeliness standards.

INQUIRIES:

Direct policy questions concerning this Action Transmittal to Phylliss Arrington at 410-767-7079. Direct systems questions to Patricia Bailey at 410-238-1292.

c: FIA Management Staff
Constituent Services
DHR Executive Staff
DHMH Executive Staff
OIM Help Desk
RESI

FAMILY INVESTMENT ADMINISTRATION

**STATE
VERIFICATION
EXCHANGE
SYSTEM
(SVES)**

USERS MANUAL

**BUREAU OF ADMINISTRATIVE SERVICES
MEDICAL ASSISTANCE OPERATIONS**

**Revised January 11, 2000
Approved, FIA Standing Policy Committee, January 24, 2000**

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**Appendix A, SVES and 40-Quarters Forms and Instructions;
Appendix B, Immigrants' Countries of Origin;
Appendix C, Coverage Groups in MMIS-II.**

In a revision dated June 30, 1999, DHR-Medical Assistance Operations added information to this manual to (1) reflect prisoner information availability and (2) include a new code on SVES Response Screen 4 [page 33] regarding Title II benefits entitlement.

In a revision dated January 11, 2000, DHR-Medical Assistance Operations revised the SDX portion of this manual, beginning on Page 68, to provide instructions for Accreting (adding), Deleting and Changing customer records and information.

II. SYSTEM AVAILABILITY

SVES is available for users to send verification requests and review responses six days a week from 7:00 A.M. to 7:00 P.M. Users enter requests for verifications during the day. Daily requests are batch processed to SSA at 5:00 P.M. each day, **Monday through Friday**. SVES goes off line at 4:00 P.M. each day for approximately 30 minutes to prepare request batches for transmittal to SSA. Responses are received from SSA on the following morning for on-line viewing. Requests input to the system after 4:00 P.M. on any day will be processed and made available approximately 36 hours after input.

SVES will "idle out" if not used for fifteen minutes. If "idled out," users must re-access SVES (See Section IV: How to Access SVES).

III. SYSTEM SECURITY

SVES captures and retains all verification requests and inquiries to provide an audit trail for safeguards against system abuse. These records include the LOGONID of the person and the Social Security Number (SSN) or Claim Account Number (CAN) requested or response viewed.

IV. SYSTEM PROBLEMS

LOCAL DEPARTMENT USERS

ACCESS: Problems regarding logon IDs, passwords, and access to SVES should be directed to the DHR Help Desk. When requesting access to SVES, advise the System Specialist that you need access to SVS0 ("0" = Zero).

XI. SDX ON-LINE

INTRODUCTION

The State Data Exchange (SDX) On-Line system allows FIP case managers and other designated users to select and view customer information regarding SSI application and payment history. The SDX On-Line process automates the tracking of SSI information necessary for adding individuals to and removing individuals from Federal Medical Assistance. To reach the SDX On-Line System, follow the SVES sign-on procedure described on pages 4 through 6 of this manual. After sign-on, select and press the **SDX Option** (option 5), to display the **SDX MAIN MENU**, shown below.

DATE: MM/DD/YYYY	THE STATE OF MARYLAND	TIME: HH:MM
	DEPARTMENT OF HUMAN RESOURCES	
	SDX ONLINE SYSTEM	
	SDX MAIN MENU	
CHOOSE NUMBER OPTION: _		
1) SSN INQUIRY		
2) NAME BROWSE		
3) ACCRETION LIST		
4) CLOSING LIST		
5) CHANGE LIST		
TO EXIT - PRESS CLEAR		
TO SVES - PRESS PF1		

A blinking cursor displays at the "CHOOSE NUMBER OPTION:" prompt. The options available are:

- 1) SSN (Social Security Number) Inquiry;
- 2) Name Browse;
- 3) Accretion List;
- 4) Closing List;
- 5) Change List.

These options are discussed in detail starting on page 69 of this manual. To select an option, press its corresponding keyboard number then press the <ENTER> key.

Other options are:

- To exit the SDX screens and return to the sign-on routine, press the **CLEAR** key on a CIS terminal or the "PAUSE/BREAK" key on a PC workstation.
- To return to the State Verification and Exchange System (SVES) menu, press the **PF1** key on a CIS terminal or the **F1** key on a PC workstation.

Caution: Data in the SDX may be up to one week old. Please use the SVES for more current data.

OPTION 1 - SSN INQUIRY

To choose and display the **SSN INQUIRY** screen shown below, press **1** then the **<ENTER>** key.

DATE: MM/DD/YYYY	THE STATE OF MARYLAND	TIME: HH:MM
DEPARTMENT OF HUMAN RESOURCES		
SDX ONLINE SYSTEM		
SSN INQUIRY		
ENTER SSN: _____		
FOR SVES MENU - PF1		
FOR SDX MENU - PF3		
FOR EXIT - CLEAR		

The following options are available on the **SSN INQUIRY SCREEN**:

- To view a customer's SDX Data Screens, key in a customer's Social Security number **without dashes**, then press the **<ENTER>** key.
- To return to the SVES menu, press the **PF1** key.
- To return to the SDX menu, press the **PF3** key.
- To exit the program, press the **CLEAR** key (the **"PAUSE/BREAK"** key on a PC workstation).

OPTION 2 - NAME BROWSE

To display the NAME BROWSE screen, press 2 on the SDX MAIN MENU, then the <ENTER> key.

DATE: MM/DD/YYYY	THE STATE OF MARYLAND	TIME: HH:MM
DEPARTMENT OF HUMAN RESOURCES		
SDX ONLINE SYSTEM		
NAME BROWSE		
ENTER NAME FOR BROWSE:		
LAST NAME: _____		
FIRST NAME: _____		
MIDDLE INITIAL: _____		
LIMIT BROWSE TO:		
DONUM: _____		
MEDICAID ELIG CODE: _____		
PAY STATUS: _____		
FOR SVES MENU - PF1		
FOR SDX MENU - PF3		
FOR EXIT - CLEAR		

This screen allows alphabetic name browsing and provides for controlled browsing by District Office, MEDICAID Eligibility Code and SSI Pay Status. Browsing instructions begin on Page 71.

Other options are:

- To return to the SVES menu, press the PF1 key.
- To return to the SDX menu, press the PF3 key.
- To exit the program press the CLEAR key. (the "PAUSE/BREAK" key on a PC workstation).

NAME BROWSING

To request the alphabetized list shown below, move the cursor to the prompt at the right of the "LAST NAME:" field and enter one of the following options:

- Several letters of a last name then the <ENTER> key;
- A full last name then the <ENTER> key;
- A last name, <TAB>, a name in the "FIRST NAME" field, then <ENTER>, or
- A last name, first name and middle initial in their fields then <ENTER>.

DATE: MM/DD/YYYY DHR SDX ONLINE SYSTEM TIME: HH:MM PAGE: 1

START SEARCH AT: NAME LA _____

LIMIT BY:		DONUM	MED ELIG CODE G	PAY STATUS		
NAME	DONUM	SSN	MED CD	DOB	PAYSTAT	
01. LASTNAME	FIRSTNAMEA	16	###-##-####	C	MM/DD/YYYY	N07
02. LASTNAME	FIRSTNAMEB W	345	###-##-####	Y	MM/DD/YYYY	C01
03. LASTNAME	FIRSTNAMEC C	30	###-##-####	D	MM/DD/YYYY	C01
04. LASTNAME	FIRSTNAMED	030	###-##-####	W	MM/DD/YYYY	C01
05. LASTNAME	FIRSTNAMEE	021	###-##-####	R	MM/DD/YYYY	N07
06. LASTNAME	FIRSTNAMEF B	020	###-##-####	R	MM/DD/YYYY	E01
07. LASTNAME	FIRSTNAMEG L	15	###-##-####	Y	MM/DD/YYYY	E01
08. LASTNAME	FIRSTNAMEH A	152	###-##-####	G	MM/DD/YYYY	S06
09. LASTNAME	FIRSTNAMEH I	160	###-##-####	C	MM/DD/YYYY	C01
10. LASTNAME	FIRSTNAMEI	02	###-##-####	C	MM/DD/YYYY	N07
11. LASTNAME	FIRSTNAMEJ M	162	###-##-####	W	MM/DD/YYYY	N07
12. LASTNAME	FIRSTNAMEJ V	340	###-##-####	Y	MM/DD/YYYY	N07
13. LASTNAME	FIRSTNAMEK	110	###-##-####	D	MM/DD/YYYY	N07
14. LASTNAME	FIRSTNAMEL N	151	###-##-####	G	MM/DD/YYYY	N07
15. LASTNAME	FIRSTNAMEM	356	###-##-####	G	MM/DD/YYYY	N07

ENTER LINE NUMBER FOR INQUIRY: __ SDX MENU-PF3, EXIT-CLEAR, SVES-PF1

PRESS PF8 TO CONTINUE

To display a customer record, enter the line number shown alongside the desired name at the "ENTER LINE NUMBER FOR INQUIRY" prompt and press the <ENTER> key. The system will display SCREEN 1 (described on Page 74) and SCREEN 2 (described on Page 84).

RESTRICTED BROWSING

With the "LIMIT BROWSE TO:" section, the user can restrict a name search to a specific District Office (DONUM), MEDICAID Eligibility Code or SSI Pay Status.

- DISTRICT OFFICE NUMBER ("DONUM"):**

To browse for customers by District Office, enter the appropriate information in the "NAME" fields of the NAME BROWSE screen, then enter the District Office code (from Page 9) in the "DONUM" field. Press the <ENTER> key. Shown below is a name list for the Garrett County District Office ("DONUM"=110).

DATE: MM/DD/YYYY DHR SDX ONLINE SYSTEM				TIME: HH:MM PAGE: 1		
START SEARCH AT: NAME LA _____						
LIMIT BY: DONUM <u>110</u>		MED ELIG CODE _____		PAY STATUS _____		
NAME	DONUM	SSN	MED CD	DOB	PAYSTAT	
01. LASTNAME FIRSTNAMEA	110	###-##-####	C	MM/DD/YYYY	N07	
02. LASTNAME FIRSTNAMEB W	110	###-##-####	Y	MM/DD/YYYY	C01	
03. LASTNAME FIRSTNAMEC C	110	###-##-####	D	MM/DD/YYYY	C01	
04. LASTNAME FIRSTNAMED	110	###-##-####	W	MM/DD/YYYY	C01	
05. LASTNAME FIRSTNAMEE	110	###-##-####	R	MM/DD/YYYY	N07	
06. LASTNAME FIRSTNAMEF B	110	###-##-####	R	MM/DD/YYYY	E01	
07. LASTNAME FIRSTNAMEG L	110	###-##-####	Y	MM/DD/YYYY	E01	
08. LASTNAME FIRSTNAMEH A	110	###-##-####	G	MM/DD/YYYY	S06	
09. LASTNAME FIRSTNAMEH I	110	###-##-####	C	MM/DD/YYYY	C01	
10. LASTNAME FIRSTNAMEI	110	###-##-####	C	MM/DD/YYYY	N07	
11. LASTNAME FIRSTNAMEJ M	110	###-##-####	W	MM/DD/YYYY	N07	
12. LASTNAME FIRSTNAMEJ V	110	###-##-####	Y	MM/DD/YYYY	N07	
13. LASTNAME FIRSTNAMEK	110	###-##-####	D	MM/DD/YYYY	N07	
14. LASTNAME FIRSTNAMEL N	110	###-##-####	G	MM/DD/YYYY	N07	
15. LASTNAME FIRSTNAMEM	110	###-##-####	G	MM/DD/YYYY	N07	

ENTER LINE NUMBER FOR INQUIRY: _____ SDX MENU-PF3, EXIT-CLEAR, SVES-PF1
PRESS PF8 TO CONTINUE

Note: To browse by Local Department (e.g., Baltimore City, Montgomery County or Prince George's County), enter the appropriate information in the NAME fields, then enter the Local Department code on page 75 of this manual in the "DONUM" field, followed by an asterisk (e.g., "15*"). Press the <ENTER> key.

- MEDICAID ELIGIBILITY CODE:**

To browse for customers by MEDICAID Eligibility Code, enter the appropriate information in the "NAME" and "DONUM" fields, then enter the desired "MEDICAID ELIG CODE." Press the <ENTER> key. To prevent a degradation in system response time, MEDICAID Eligibility browses are limited to codes C, D, G, R, W, or Y (see page 78 for code definitions).

- **PAY STATUS:**

To browse by **PAY STATUS**, enter the appropriate information in the **"NAME"** and **"DONUM"** fields, then enter a **"PAYSTAT"** code. Press the <ENTER> key. To prevent a degradation in response time, searches are limited to codes **C01, E01, H80, N01, N02, N04, N07, N12, N17, N19, N20, N30, N31, N32, N35, N36, N37, N40, N41, N42, N43, N44, S06, S07, S08, T01, T31, T50** and **T51**. See Pages 35 through 38 for a list of codes and definitions.

MAXIMUM SCREENS AND DISPLAYS

To prevent system overload and degraded response time, SDX will display a maximum of 10 screen-pages of 15 line items each for each unrestricted name request. Upon reaching maximum capacity, the message **"END OF DISPLAY"** will appear in the lower right-hand corner of the screen. To get additional names, press the **PF3** key to return to the SDX Main Menu, the **2** key for Name Browse, then enter the last full name displayed on the Name Browse screen. No more than 30 screen-pages of 15 line items can be displayed for each District Office, MEDICAID Code or Pay Status request. The message **"END OF DISPLAY"** appears in the lower right-hand corner of the screen when the system reaches maximum display.

SDX DATA SCREEN 1

After the user enters the line number alongside the desired name on any of the listings and presses the <ENTER> key, the system displays the following screen with the most current SDX information:

SSA RUN DATE 06/19/1999		MD STATE DATA EXCHANGE		DHR RUNDATE 06/29/1999	
LDSS 354 B-LONG TERM CARE (LTC)		SCREEN 1		TRANSCODE RF	
LDSS SOURCE MMIS					
SSN 000-00-0004		CLAIM # 223-23-3232D		PAY ST C01 DATE 07/1980	
				JURISDICTION 21030	
NAME LASTNAME2		MARY		MA ST Y DATE 01/01/1975	
ADDR		G		DENIAL DATE 00/00/0000	
				APPEAL DATE 00/00/0000	
				SSI APPL DATE 01/01/1974	
		ZIP -		APPL FILE DATE 00/00/0000	
MARITAL STATUS 3		RECIPIENT TYPE CODE DI		ALIEN Q DATE 00/0000	
SEX F		DOB 02/10/1911		COUNTRY DA-A	
PAYEE MARY G LASTNAME2		RACE W		L TRANS MB DATE 11/21/1998	
1123 GURGLE AVE				SSI MONTHLY \$480.00	
BALTIMORE		MD		SSI GROSS \$480.00	
		ZIP 21211-2427		DEATH 0 DATE 00/00/0000	
DHMH MEDICAID ELIGIBILITY DATA:			DONUM 354		MMIS RUNDATE 06/27/1999
MA# 30012345A110		COVERAGE L98 TYPE A		BEGIN 03/01/1999	END 12/31/1999
CARES IRN 012345678		INSR SB		CANCEL 00/00/0000	ACTIVITY 04/26/1999
TO SVES MENU - PF1		NEXT PAGE - PF8		RETURN TO LIST - PF4	
TO SDX MENU - PF3		TO EXIT - CLEAR		ENTER NEW SSN _____	

Screen 1 is an inquiry-only screen. There are no data elements to be changed. The cursor moves to the **ENTER NEW SSN** line. After viewing data, the user has the following options:

- To view information on Screen 2 for the current customer, Press the **PF8**.
- To return to the alphabetized list of names (Page 71), press the **PF4** key.
- To return to the SVES menu, press the **PF1**.
- To return to the SDX menu, press the **PF3**.
- To exit the program, press the **CLEAR** key (the "PAUSE/BREAK" key on a PC workstation).
- To retrieve another customer's SDX record, enter the customers Social Security number **without dashes** at the "ENTER NEW SSN" prompt.

DATA ELEMENT DESCRIPTIONS

The following are descriptions of the data elements in SDX Screen 1. Immediately following each data element name, in parentheses, is the SSA Program Operations Manual System (POMS) reference number. For information regarding POMS, please call the FIA Bureau of Administrative Services at 410-767-7207.

SSA RUN DATE: (No POMS Code) The date SSA created the update file.

DHR RUN DATE: (No POMS Code) The date that DHR processed the SSA update file.

LDSS: (No POMS Code) The Local department or District Code. If the record has been updated via a SDX/MMIS information merge, a three-digit code will be displayed as shown in the District Office Code list on page 10 of this manual. If the record has not been updated through MMIS, the following two-digit Local Department code will be displayed:

<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>
00*	Unlisted	08	Charles	17	Queen Anne's
01	Allegany	09	Dorchester	18	St. Mary's
02	Anne Arundel	10	Frederick	19	Somerset
03	Baltimore	11	Garrett	20	Talbot
	County	12	Harford	21	Washington
04	Calvert	13	Howard	22	Wicomico
05	Caroline	14	Kent	23	Worcester
06	Carroll	15	Montgomery	30	Baltimore City
07	Cecil	16	Prince George's		

*This code will be displayed when there has been no MMIS update and the system detects that the SSA jurisdiction code is invalid.

TRANSCODE (Transaction Code): (305F.47) A 2-position alpha/numeric element indicating the action or source of the SDX record

<u>Code</u>	<u>Value</u>
00	No action has been taken since the last SDX record (appears on treasury files only), refers to no payment actions only
0P	Identifies a pending record
0W	Identifies a T30 termination action
0X	Identifies a T30 reaccretion, potentially ineligible (appears only on SDX update files)
0Y	Identifies a T30 reaccretion, potentially eligible (appears only in SDX update files)
0Z	Identifies a T30 new/replacement record
01	New claim – currently eligible – If Payment Status code is equal to "E01", no SSI payment will be made.
02	New claim – currently ineligible
03	New to State – eligible for SSI and/or supplementation in new State
04	New to State – Ineligible in new State

TRANSCODE: (305F.47), Continued

- 05** Individual moved to another State
- 06** Change, other than a change of address, has occurred in the record
- 07** Nonpayment (pay status equals "Nxx") or termination (pay status equals "Txx, other than "T30") transaction to a record in pay status "C01", "E01", "M01", "P01, or "Sxx", or a change to an ineligible record that does not effect eligibility status
- 08** Intrastate change of address and/or payee name change (Payee Name and Mailing Address, Payee ZIP Code, Residence Address, Residence ZIP Codes)
- 09** Intrastate change of address (and/or payee name change) and change in amount paid
- 10** State identification number accreted
- 16** Combination of codes "06" and "10"
- 17** Combination of codes "07" and "10"
- 20** State identification number not accreted due to mismatch
- 30** State identification number changed
- 36** Combination of codes "06" and "30"
- 37** Combination of codes "07" and "30"
- 40** State identification number not change due to mismatched
- 50** State identification number deleted
- 56** Combination of codes "06" and "50"
- 60** State identification number not deleted due to mismatch
- 70** Requested SDX record provided in response to State query
- 80** No requested SDX data provided due to mismatch
- 90** No requested SDX data provided due to mismatch. State requested a pending record and no record is in file
- A0** State cross-reference WIN updated
- A6** Combination of codes "A0" and "06"
- A7** Combination of codes "A0" and "07"
- BJ** Identifies a "503 Leads" file record
- B0** IAR transaction processed
- CO** IAR transaction rejected (reject listing to follow)
- RF** Identifies a reconciliation file record

LDSS SOURCE: (No POMS Code) The source of the MMIS data. The following are the current LDSS Source possibilities:

- If the record has been updated by a FIP caseworker (see Page 95 for details), the following message will appear: "**CHANGED ONLINE BY ABC### - CCYYMMDD**", where "**ABC###**" is the Logon ID of the worker making the change and "**CCYYMMDD**" is the Year (with century), Month and Date of the change. This message appears at the SDX update immediately following a change to the customers record
- If the record has been updated via a SDX/MMIS information merge then the letters "**MMIS**" will display.
- If the record has not been updated then the phrase "**SSA JURISDICTION**" will display.

SSN: (305F.28) The user-requested Social Security Number.

CLAIM #: (305B.13) The Title II record under which the customer is insured.

NAME: (305D.1) The SSI customer's name, Last name first.

ADDR: (305F.13) The SSI customer's street address, city and state.

ZIP: (305F.15) The SSI customer's 9-digit ZIP Code.

MARITAL STATUS: (305E.2) The SSI customer's marital status. See codes on page 43 of this manual.

RECIPIENT TYPE CODE: (305F.4) A two-position field which indicates the type of SSI customer. If a customer initially is disabled, this code will not change at age 65:

<u>Code</u>	<u>Value</u>
AI	Aged individual
AS	Aged spouse
BI	Blind individual
BC	Blind child
DC	Disabled child
DI	Disabled individual
DS	Disabled spouse
EP	Essential person
XS	Ineligible spouse.

SEX: (305F.23) The sex of the SSI customer. See codes on page 35 of this manual.

DOB: (305B.22) The SSI customer's date of birth.

RACE: (305F.2) The SSI customer's race. See codes on page 35 of this manual.

PAYEE - 4 lines: (305E.21) The first name, last name, street address, city, state and ZIP code of the person or facility receiving the SSI payment. This may or may not be the actual SSI customer.

PAY ST: (305E.25) SSI Customer's Payment Status code. See codes on pages 35 through 38 of this manual.

DATE: (305E.24) The date of payment of the SSI Monthly Assistance and State Supplement Amounts.

JURISDICTION: (305F.34) The 5-digit code for the SSI customer's city or county of residence. See codes on page 24 of this manual.

MA ST: (305E.5) The SSI customer's MEDICAID Status code (codes with an asterisk are categorically eligible for SSI):

<u>Code</u>	<u>Value</u>
A	Refused to assign rights to third party medical payments or refuse to provide third party liability information. Referred to State, Federal determination not possible.
B	Deeming waived: child under a State home care plan.
C*	Federally administered MEDICAID coverage should be continued despite payment status code (e.g., 109(b) participants).
D**	Disabled adult child (1634 States).
G*	Goldberg/Kelly payment continuations.
Q*	MEDICAID Qualifying Trusts may exist.
R+	Referred to State for determination (1634 States), Federal determination not possible.
S	State determination - not SSA responsibility.
W**	Widow(er) (1634 States)
Y**	Eligible for MEDICAID (1634 States only).

+NOTE: States with a 1634 agreement with SSA generally do not make a separate eligibility determination for categorical applicants because MEDICAID eligibility is determined by SSA. Maryland is a "1634" State.

DATE: (305E.4) MEDICAID Effective Date. This reflects the most current period of eligibility or referral for MEDICAID.

DENIAL: (305B.28) A three-position alpha/numeric display showing the reason an SSI claimant was initially denied SSI payments. See codes with an "N" prefix, beginning on page 34 of this manual.

DATE: (305B.29) The date the SSI customer was denied SSI benefits or State Supplementation.

APPEAL: (305B.4) A 1-position code showing the level of appeal and the latest appeal action:

<u>Code</u>	<u>Value</u>
A	Reconsideration – appeal request filed
B	Reconsideration – appeal request dismissed or withdrawn
C	Reconsideration – Affirmation of prior decision
D	Reconsideration – Reversal or modification of prior decision
K	Court activity pending
L	Court order or decision unfavorable to a claimant and not appealed by SSA
M	Court order or decision favorable to a claimant and not appealed by SSA
N	Court order or decision favorable to a claimant and appealed by SSA
O	Class action suit
P	Hearing – Appeal request filed
Q	Hearing – Appeal request dismissed or withdrawn
R	Hearing – Affirmation of prior decision
S	Hearing – Reversal or modification of prior decision
W	Appeals Council – Appeal request filed
X	Appeals Council – Appeals request dismissed or withdrawn
Y	Appeals Council – Affirmation of prior decision
Z	Appeals Council – Reversal or modification of prior decision

DATE: (305B.5) The date of the most recent **appeal** action.

SSI APPL DATE: (305B.7) The SSI effective filing date. This represents the date the SSI customer filed an application for SSI benefits or the **date** the customer is **deemed** to have filed an application.

APPL FILE DATE: (305B.8) This is the **actual** date of the application if it differs from the **SSI APPL DATE**. This date is generally later than the **application** date if the customer filed an application after making written or oral inquiry to the SSA **office** indicating an **intent** to file an SSI application.

ALIEN: (305B.3) A one-position code indicating the immigrant or citizenship status of SSI customers.

<u>Code</u>	<u>Value</u>
A	Proven born in U.S., U.S. citizen
B	Alleged born in U.S., this includes naturalized citizens
C	U.S. citizen born outside the U.S., this includes naturalized citizens
D	Alleged U.S. citizen – pre-January 01, 1972
E	No citizenship or alien status development undertaken; case denied for reason(s) other than citizenship/alien status
F	Refugee status – Section 207 or 203(A)(7) of the I.N.A.
G	Parole status – Section 2129d0 of the I.N.A.
H	Silva vs. Levi alien
I	Indochinese refugee (this is a an obsolete code)
J	Deferred action status alien
K	Alien lawfully admitted to the U.S. for permanent residence
L	Asylum status – Section 208 of the I.N.A.
M	Resident of the Northern Mariana Islands
N	Identify and citizenship of the individual verified by the znumbident interface (code previously A or B)
P	Pre-January 01, 1972 alien presumed lawfully admitted for permanent residence)
Q	Alleged born in the U.S. – allegation corroborated by a U.S. place if birth shown on the on-line Numident.
R	Lawful temporary resident – status granted as a result of the Immigration Reform and Control Act of 1986
S	Lawful permanent resident – status granted as a result of the Immigration Reform and Control Act of 1986
T	Alien granted voluntary departure
V	Systems override applied following interface edit (obsolete code)
W	Alien granted a stay of deportation
X	Cuban/Haitian entrant
Y	Legalized agricultural worker pursuant to the immigration Reform and Control Act of 1986
Z	Alien on whose behalf an immediate relative petition has been approved.

DATE: (305B.2) The immigrant SSI customer's date of residence in the U.S. An entry of 01/1974 means residency began in January 1974 or earlier. For all other dates: if the input is prior to October 1980, it is the actual **year** that residency began with a deemed month of January; if the input is after September 1980, it is the actual **year and month** that residency began.

COUNTRY: (305B.18) A two-position alphabetic display showing the immigrant SSI customer's country of origin. See the Alien's Country of Origin table in the Appendix, pages B-2 and B-3.

DA-A: (305B.33) A one-position alphabetic display showing drug or alcohol addiction:

<u>Code</u>	<u>Value</u>
A	Disabled individual is an alcoholic.
B	Disabled individual is drug addict and alcoholic.
D	Disabled individual is a drug addict.
N	Individual is neither drug addict nor alcoholic.
Q	Individual may or may not be a drug addict or an alcoholic.
Blank	No code transmitted.

L TRANS: (305D.6) A two-position alpha/numeric display showing the **last transaction type**. This reflects only one event although more than one reportable event may have occurred simultaneously:

<u>Code</u>	<u>Value</u>
A1	Eligible individual name change.
AD	Address change or correction.
BC	Direct deposit.
CC	Folder involvement.

SSI MONTHLY: (305F.26) A six-position (\$\$\$\$cc) numeric display of the **actual** monthly SSI assistance amount paid to a customer under Title XVI after adjustments for overpayments.

SSI GROSS: (305F.25) A six-position (\$\$\$\$cc) numeric display showing the Federal monthly SSI amount due to a customer before adjustments for overpayments.

DEATH: (305B.25) A one-position numeric code showing the source of a notification of death:

<u>Code</u>	<u>Value</u>
1	The SSA District Office (DO) notification or manual adjustment.
2	Hospital Insurance notification.
3	Master Beneficiary Record (MBR) notification.
4	Treasure returned check notification.
5	Treasury returned check notification.
6	State notification.
0	Initialized value.

DATE: (305B.24) The date of death.

DHMH MEDICAID ELIGIBILITY DATA (MMIS data - no POMS codes)

DONUM: The three-digit local department district/office number. See page 10 of this manual.

MMIS RUNDATE: The date that DHMH created and sent the latest MMIS data file to OIM.

MA: The SSI Customer's Maryland Medical Assistance (MA) Number.

COVERAGE: A three-position alpha/numeric code showing the MMIS II Coverage Groups. Described in Appendix C, pages C1 through C14.

TYPE: A one-position alphabetic code showing the type individual receiving MMIS II coverage. Described in Appendix C, page C14.

BEGIN: The date that Medical Assistance coverage began. If there is no coverage, then the date is shown as "0/0/00."

END: The date that Medical Assistance coverage ended. If there has been no coverage, then the date will show as "0/0/00."

CARES IRN: The SSI customer's 9-position CARES Individual Record Number.

INSR: The SSI customer's verified or potential DHMH Insurance Code:

<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>
AT	Aetna	SD	Supplemental B/C of DE	T8	Potential Coverage
BC	Blue Cross/ Shield of MD	SE	Supplemental Equitable Life	UI	United Insurance
BD	Blue Cross/ Shield of DE	SG	Supplemental Group Hospitalization	V9	Previously had insurance, doesn't now
BL	Bankers Life	SL	Supplemental Lincoln National	X1	Single carrier, no assigned code
BO	Blue Cross/Out of State	SM	Supplemental Metropolitan Life	YF	Freight Drivers & Helpers Health, Local 557
CF	Care First	SO	Supplemental Out of State BC	YG	Government Employees Health Association
CG	Connecticut General	SP	Supplemental Prudential	YH	Hospital & Health Care Employees, Local 1199E
CH	Champus	ST	Supplemental Travelers	YL	National Association of Letter Carriers
CI	Combined Insurance Co.	SZ	Supplemental Multiple Coverage	YM	Mailhandlers' Benefit Fund
CO	Columbia Life	S1	Supplemental Medicare Coverage	YT	Teamster H & W, Local 355
EQ	Equitable Life	S2	American Association of Retired Persons	YW	Willse & Associates
FS	Freestate Health Plan	S3	Supplemental Physician's Mutual	YI	Union or Association type coverage, no assigned code.
GA	Group Health Association	TR	Travelers	Z1	More than one health carrier
GH	Group Hospitalization	T6	Case that never had insurance		
HI	Hartford Insurance	T7	Unverified coverage		
KP	Kaiser Permanente				
LN	Lincoln National				
MD	MDIPA				
MO	Mutual of Omaha				
MT	Metropolitan Life				
OC	Optimum Choice				
PH	Prudential				
SA	Supplemental Aetna				
SB	Supplemental B/C of MD				
SC	Supplemental Connecticut General				

CANCEL: The date that the SSI customer's insurance was canceled (MM/DD/YYYY). If there is no insurance coverage or if the coverage has not been canceled, then the date will show as "0/0/00."

ACTIVITY: The date of last posting of Medicaid Eligibility Data (MM/DD/YYYY). If there is no activity, then the date will show as "0/0/00."

```

SSA RUN DATE 06/19/1999      MD STATE DATA EXCHANGE      DHR RUNDATE 06/29/1999
LDSS 354 B-LONG TERM CARE (LTC)  SCREEN 2                  TRANSCODE RF
LDSS SOURCE MMIS

SSN 000-00-0004      NAME LASTNAME2      MARY      G
SPOUSE/PARENT      NAME      SS#
ESS. PERSON CODE O      NAME      SS#

DISABILITY PAY CODE F      IAR 0      COMPETENCY CODE      DO C09

UNEARNED INCOME:
TYPE  BEGIN DATE  END DATE  AMOUNT  FRQ      CLAIM NO      PERIOD
A      04/1977      04/1985      $00    T      220-07-0730M      WAGES      $ .00
A      01/1999      00/0000      $482.00  C      216-01-3204D      SELF-EMP      $ .00
A      01/1998      12/1998      $476.00  T      216-01-3204D      CHARGEABLE INCOME:
                                           EARNED      $ .00
DEEMED INCOME AMOUNT      $ .00      DEEMED (QTR)      $ .00
REC. ID CODE I      REC. EST. DATE 07/04/1973      UNEARNED      $462.00
*****
*****
TO SVES MENU - PF1      PREVIOUS PAGE - PF7
TO SDX MENU - PF3      TO EXIT - CLEAR      ENTER NEW SSN

```

- To return to Screen 1 and view information for the current customer, Press the **PF7** key.
- To return to the SVES menu, press the **PF1** key.
- To return to the SDX menu, press the **PF3**.
- To exit the program, press the **CLEAR** key (the **"PAUSE/BREAK"** key on a PC workstation).
- To retrieve another customer's SDX record, enter the customers Social Security number **without dashes** at the **"ENTER NEW SSN"** prompt.

DATA ELEMENT DESCRIPTIONS

The following are descriptions of the data elements in SDX Screen 2. Immediately following each data element name, in parentheses, is the SSA Program Operations Manual System (POMS) reference number.

The following information is repeated from Screen 1:

SSA RUN DATE:	LDSS SOURCE:
DHR RUN DATE:	SSN:
LDSS SOURCE:	NAME:
TRANSACTION CODE:	

The following information is unique to Screen 2:

SPOUSE/PARENT ELIG: (305E.10) The name of the ineligible spouse or parent, last name first.

SS#: (305F.35) The Social Security number of the ineligible spouse or parent.

ESS. PERSON CODE: (305C.8) A one-position alpha/numeric display which shows whether an essential person exists in an SSI customer case, and the relationship to the SSI customer:

<u>Code</u>	<u>Value</u>
0	None.
1	Essential person is an ineligible spouse.
2	Essential person is a living-with father.
3	Essential person is a living-with mother.
4	A non-relative is in the SSN of Eligible Spouse or Parent.
5	A non-relative is in the SSN of Other Parent.
A	An ineligible spouse and at least one other person are both essential persons.
B	A living-with father and at least one other person are both essential persons.
C	A living-with mother and at least one other person are both essential persons.
D	There are at least two essential persons, one of whom is in SSN of Eligible Spouse or Parent.
E	There are at least two essential persons, one of whom is in the SSN of Other Parent.
F	A living-with parent is the essential person (applicable in pipeline cases only).

NAME: (No POMS Code) The name of the essential person.

SS: (305F.34) The Social Security number of the essential person.

DISABILITY PAY CODE: (305B.31) A one-position alphabetic display which indicates the status of SSI disability and blind cases:

<u>Code</u>	<u>Value</u>
F	Final determination - allowance.
P	Presumptive finding.
R	Referred to State agency Code indicates pending determination or final determination - denied.
S	State determination (conversion cases only) - allowance.
T	Presumptive finding - state conversion record.
X	No disability determination made (claim denied on basis of non-disability issues).
" "	Not applicable.

IAR: (305D.3) A one-position numeric display determined by the SDX program logic. This indicates the timing of SSA reimbursement of State interim assistance payments or the reason for not effecting reimbursement. This status code may change (e.g., where reimbursement has been effected or attempted).

<u>Code</u>	<u>Value</u>
0	Essential person record. Applicant did not authorize reimbursement. There is no Federal/State agreement to reimburse [no Maryland Form 340 on file], or the SDX record is for the month following the month of the recipient's move from the state of reimbursement.
1	Total amount shown is the SSI Monthly Assistance amount. The State Supplement Amount is being, or was, sent to the State or county as reimbursement.
2	All or part of the amount shown in the SSI Monthly Assistance Amount and the State Supplementary Amount is being, or was, sent to the State or county as reimbursement.
3	Reimbursement is not being effected. Applicant is ineligible or retroactive payment is not due.
4	Reimbursement assistance case pending or denied.
5	Reimbursement check returned.

COMPETENCY CODE: (305D.14) A one-position alphabetic display which identifies the representative payee's status as to legal guardianship and/or competency of the recipient:

<u>Code</u>	<u>Value</u>
A	Recipient is competent and the representative payee is the legal guardian.
B	Recipient is competent and there is no legal guardian.
C	Recipient is competent and the legal guardian is someone other than the representative payee.
D	Recipient is incompetent and the representative payee is the legal guardian.
E	Recipient is incompetent and there is no legal guardian.
F	Recipient is incompetent and the legal guardian is someone other than the representative payee.
L	Representative Payee is a financial institution with whom the recipient has entered into a living trust agreement.
N	There is no legal guardian.
O	Someone other than the representative payee is the legal guardian.
Y	The representative payee is the legal guardian.

DO: (305B.32) A three-position alpha/numeric display of the Social Security Administration (SSA)
District Office Code:

<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>
A33	Rockville	095	Cambridge	276	Hagerstown
A96	Westminster	096	Elkton	277	Annapolis
C07	Greenbelt	195	Columbia	278	Towson
C09	North	196	Middle River	282	Wheaton
019	Northeast	197	Randallstown	283	Glen Burnie
020	West	199	Mondawmin	527	Camp Springs
E63	Fort Lincoln (DC)	273	Downtown	529	Frederick
094	Bel Air	274	Salisbury	530	Capitol Heights
		275	Cumberland		

UNEARNED INCOME

TYPE: (305G.11) A one-position alphabetic display which indicates the kind of unearned income the SSI customer is or was receiving. The last three occurrences of type "A" income will appear in reverse chronological order. All other types of unearned income show the most recent occurrence:

<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>
A	Social Security	P	Employment-related pension (State or local government retirement, private pension)
B	Black Lung		
C	VA (not based on need)	Q	Worker's Compensation
D	Railroad Benefits (RRB)	R	Rents, interest, dividends, royalties
E	VA (based on need)	S	Other
F	Assistance based on need and not excluded from unearned income	T	Alaska longevity bonus
G	Title II income used to offset SSI	V	Net deemed income (see Deemed Income Amount and Deemed Income Amount (Respective))
H	Income in-kind (support & maintenance)		
I	Ineligible child allocation	W	Title II income used in windfall offset computations
J	Value of one-third reduction	X	Minimum income level amount
K	Blind countable income	Y	Special needs reduction (applies to a Federal countable minimum income level)
L	Military pension		
M	Federal Civil Service pension	Z	State countable income (State of Vermont only)
N	Support payments received from absent parent	" "	Initialized value
O	Income based on need from private source		

BEGIN DATE: (305G.9) A numeric display (MM/DD/YYYY) which indicates the date when unearned income started if the payment is monthly, or when received if a one-time payment.

END DATE: (305G.10) A numeric display (MM/DD/YYYY) which reflects the effective date of termination of unearned income. Where the amount changes, this will be the last date that the previous rate or one-time payment was received.

AMOUNT: (305G.1) A six-position numeric display (\$\$\$\$cc) which reflects the monthly amount of unearned income. For type "A" (Social Security) the money amount will be **zero** when the claim/identification number has a "T" or "M" suffix (uninsured beneficiary with health benefits).

FRQ: (305G.3) A one-position alphabetic display which indicates whether an SSI customer is now or was receiving unearned income:

<u>Code</u>	<u>Value</u>
C	Continuous monthly payment or uninsured (Title II claim number suffix "T" or "M"), or Title II benefits in non-pay status.
N	One-time payment.
R	Used in conjunction with type "A" income to indicate recent Retirement, Survivors, and Disability Insurance filing, or with type "D" income to indicate potential eligibility for a Railroad Retirement Board (RRB) benefit.
T	Termination of continuous monthly payment.
U	Used only in conjunction with a type "D" entry to indicate that the RRB has jurisdiction of the Title II (type A) payment, and that the RRB has not determined the recipient's entitlement to an annuity.

CLAIM NO: (305B.12) A 12-position alpha/numeric display showing the Claim Number or Claim Identification Number under which the SSI customer receives each type of income. The formats are:

<u>Type</u>	<u>Format</u>														
A	The nine-digit SSN of the insured individual, a two-position Beneficiary Identification Code (BIC - see page 11 of this manual), and a space in position 12 of the data element.														
B	A nine-digit Black Lung claim number, two alpha characters, and a space in position 12.														
C	A nine-digit VA number, two alpha characters and a space in position 12.														
D	A nine-digit RRB number, two alpha characters (the RRB beneficiary) and a space in position 12.														
E	A nine-digit VA number, two alpha characters and a space in position 12.														
H	May contain an identifying legend entered by the SSA District Office; e.g., RENTFREE, FREERENT, etc. This legend may appear after one of the following living arrangement codes: <table data-bbox="467 758 1521 1182"> <tr> <th><u>Code</u></th><th><u>Value</u></th></tr> <tr> <td>A</td><td>Living in own household.</td></tr> <tr> <td>B</td><td>Living in non-institutional care situation.</td></tr> <tr> <td>C</td><td>Living in private non-profit residential care institution (covered by Church Amendment).</td></tr> <tr> <td>D</td><td>Living in other private non-medical institution (domiciliary care, personal care, retirement homes, etc.</td></tr> <tr> <td>E</td><td>Living in private medical institution. MEDICAID pays less than 50% of the cost.</td></tr> <tr> <td>F</td><td>Living in public institution for education or vocational training.</td></tr> </table>	<u>Code</u>	<u>Value</u>	A	Living in own household.	B	Living in non-institutional care situation.	C	Living in private non-profit residential care institution (covered by Church Amendment).	D	Living in other private non-medical institution (domiciliary care, personal care, retirement homes, etc.	E	Living in private medical institution. MEDICAID pays less than 50% of the cost.	F	Living in public institution for education or vocational training.
<u>Code</u>	<u>Value</u>														
A	Living in own household.														
B	Living in non-institutional care situation.														
C	Living in private non-profit residential care institution (covered by Church Amendment).														
D	Living in other private non-medical institution (domiciliary care, personal care, retirement homes, etc.														
E	Living in private medical institution. MEDICAID pays less than 50% of the cost.														
F	Living in public institution for education or vocational training.														
L	A nine-digit military identification number, a one-position alpha character, a one-digit character or space in position 11 and a space in position 12.														
M	A nine-digit civil service number, a one position alpha character, a one-digit character or space in position 11 and a space in position 12.														

EARNED INCOME

PERIOD: (305C.4) A two-position (Year-Month) alpha/numeric display of the current **Earned Income Period**. The code indicates the month to which earnings should be charged:

<u>Code</u>	<u>Value</u>	<u>Code</u>	<u>Value</u>
0 - 9	Codes for the years	G	July
A	January	H	August
B	February	I	September
C	March	J	October
D	April	K	November
E	May	L	December
F	June		

WAGES: (305C.6) A six-position (\$\$\$\$cc) numeric display of the **Earned Income Amount** for the month shown in **PERIOD**, above.

SELF-EMP: (305C.3) A six-position (\$\$\$\$cc) numeric display showing the estimated net amount of **Self-Employment** income shown in the **Earned Income Period**, above.

CHARGEABLE INCOME

EARNED: (305C.2) A six-position (\$\$\$\$cc) numeric display showing the current month's amount of Net Earned Income after all exclusions are applied.

DEEMED INCOME AMOUNT: (305B.26) A seven-position (\$\$\$\$\$cc) numeric display showing the current month's amount of income deemed to the SSI customer, and is used in determining eligibility for payment. Where the Budget Month Flag is set to zero, this amount is used to compute the SSI payment.

DEEMED (QTR): (305B.27) A seven-position (\$\$\$\$\$cc) numeric display showing the monthly amount deemed to the SSI customer and is used in computing payment where the Budget Month Flag is set to other than zero or is not blank. This amount will always be zero where the Budget Month Flag is equal to zero or is blank.

REC. ID CODE: (305F.6) A one-position alphabetic display determined by SDX program logic:

<u>Code</u>	<u>Value</u>
C	Couple (Eligible individual with eligible spouse).
F	Child claim with father.
I	Individual (with or without ineligible spouse).
M	Child claim with mother.
P	Child claim with parents.
X	State-to-SSA record exception.

REC. EST. DATE: (305F.5) An eight-position (MM/DD/YYYY) display showing the date that the master record was established for the SSI customer. For a reaccreted T30 record the date is the reestablishment date.

UNEARNED: (305G.5) a six-position (\$\$\$\$cc) numeric display showing the current month's Unearned Income less all exclusions. This amount is used to determine eligibility and, where the Budget Month Flag is set to zero, compute the SSI benefit.

OPTION 3 - ACCRETION LIST

To display the "ACCRETION NAME BROWSE" screen shown below, choose 3 on the SDX Main Menu then press the <ENTER> key.

DATE: MM/DD/YYYY	THE STATE OF MARYLAND	TIME: HH:MM
	DEPARTMENT OF HUMAN RESOURCES	
	SDX ONLINE SYSTEM	
ACCRETION NAME BROWSE		
ENTER NAME FOR BROWSE:		
LAST NAME:	_____	
FIRST NAME:	_____	
MIDDLE INITIAL	_	
LIMIT BROWSE TO:		
DONUM:	_____	
MEDICAID ELIG CODE:	_	
PAY STATUS:	_____	
# DAYS PENDING >=	_____	
FOR SVES MENU - PF1		
FOR SDX MENU - PF3		
FOR EXIT - CLEAR		

In this screen, a user can do alphabetic name browsing, and limit the browse to a specific District Office, MEDICAID Eligibility Code or SSI Pay Status. Other options are:

- To request a list of cases which have been on the **ACCRETIONS** file greater than or equal to a specific number of days, enter a one to three digit number at the "**# DAYS PENDING >=**" prompt and press <ENTER>.
- To return to the SVES menu, press the **PF1** key.
- To return to the SDX menu, press the **PF3** key.
- To exit the program press the **CLEAR** key ("**PAUSE/BREAK**" key on a PC workstation).

To request the alphabetized **DHR SDX ACCRETION LIST** shown on Page 92, enter one of the following options in the **ACCRETION NAME BROWSE** screen:

- Several characters of a last name then the <ENTER> key;
- A full last name then the <ENTER> key;
- A last name, <TAB>, a name in the "**FIRST NAME**" field, then <ENTER>, or
- A last name, first name and middle initial in their fields then <ENTER>.

The Accretion browse can be further defined by following the **RESTRICTED BROWSING** instructions beginning on Page 72. In the example on Page 92, the user limited the alphabetic name browse to customers who:

- Reside in Baltimore City (**DONUM = 3***);
- Are eligible for MEDICAID (**MED ELIG CODE = "Y"**), and
- Are SSI-eligible and in current pay status (**PAY STATUS = C01**).

DHR SDX ACCRETION LIST

The **DHR SDX ACCRETION LIST**, below, shows those Maryland customers who are eligible for Supplemental Security Income (SSI) according to Social Security Administration (SSA) data, but are not active in the SSI category on MMIS. A name on this list suggests that:

- 1) there is **no** MMIS data to match on the SSA data shown, or
- 2) the MMIS category code is not a valid SSI/MA category, or
- 3) MMIS information indicates that the customer no longer receives medical assistance.

The case manager must supply the missing or correct data to MMIS via CARES. Names are removed from the **DHR SDX ACCRETION LIST** only after MMIS is updated to reflect the proper active medical assistance program category.

DATE: MM/DD/CCYY		DHR SDX ACCRETION LIST				TIME: HH:MM		PAGE: 1	
SSI ELIGIBLE ON SDX BUT NOT ACTIVE IN SSI CATEGORY ON MMIS									
START SEARCH AT:		NAME LA _____							
LIMIT BY:		DONUM 3*_____		MED ELIG CODE Y _____		PAY STATUS C01 _____			
		SSA DATA				MMIS DATA		DAYS ON	
DONUM	NAME	PAYST	MEDCD/DATE	SSN	CAT	END DATE	IRN	LIST	
1 30	LASTNAME1	B C01 Y	03/19/1997	000-00-0001	-				048
2 354	LASTNAME2	E C01 Y	07/19/1980	000-00-0004	L98-A	12/31/1999	012345678		048
3 353	LASTNAME3	E C01 Y	07/19/1997	000-00-0032	E02-E	07/31/1999	098765432		041
4 346	LASTNAME4	J C01 Y	08/19/1978	000-00-0005	S98-D	12/31/1999	102938475		048
5 345	LASTNAME5	K C01 Y	08/19/1998	000-00-0092	F01-R	06/01/1999	876541234		048
6 30	LASTNAME6	L C01 Y	06/19/1999	000-00-0043	-				005
7 30	LASTNAME7	R C01 Y	04/19/1991	000-00-0064	-				048
8 338	LASTNAME8	S C01 Y	04/19/1996	000-00-0007	S09-N	05/01/1998	000000000		048
9 345	LASTNAME9	S C01 Y	05/19/1999	000-00-0026	S02-D	02/01/1999	907856341		005
10 343	LASTNME10	I C01 Y	08/19/1998	000-00-0015	F01-R	01/01/1999	000000000		048
11 340	LASTNME11	Q C01 Y	12/19/1998	000-00-0053	F01-R	06/01/1999	102938475		013
12 30	LASTNME12	R C01 Y	01/19/1999	000-00-0088	S09-N	11/30/1999	000000000		048
13 30	LASTNME13	M C01 Y	06/19/1999	000-00-0007	-				023
14 353	LASTNME14	M C01 Y	06/19/1999	000-00-0022	E02-E	12/31/1999	192837465		041
15 331	LASTNME15	S C01 Y	04/19/1999	000-00-0006	S01-D	07/01/1999	543210987		008

ENTER LINE NUMBER FOR OPTIONS: _____ SDX MENU - PF3, EXIT - CLEAR, SVES - PF1
PRESS PF8 TO CONTINUE

To obtain a customer record, enter the desired line item number (shown in green at the left side of the Accretion List screen just before the "DONUM" field) at the "ENTER LINE NUMBER FOR OPTIONS" cursor prompt, then press the <ENTER> key. The system will display the "ACCRETION OPTION MENU FOR:" screen shown on Page 94 for the desired individual.

To request a list of customer records on file for a specific period of time, enter a one to three digit number at the "DAYS PENDING >=" prompt and press <ENTER>. As an example, a case manager wants to see a list of cases on the **ACCRETION LIST** greater than or equal to 40 days. The case manager uses the same criteria as shown on Page 91, then enters the number "40" at the "DAYS PENDING >=" prompt and presses <ENTER>. The system produces the list shown on Page 93.

DATE: MM/DD/CCYY DHR SDX ACCRETION LIST TIME: HH:MM PAGE: 1

SSI ELIGIBLE ON SDX BUT NOT ACTIVE IN SSI CATEGORY ON MMIS

START SEARCH AT: NAME LA _____

LIMIT BY: DONUM 3* MED ELIG CODE Y PAY STATUS C01

SSA DATA				MMIS DATA				040 <= DAYS ON	
DONUM	NAME	PAYST	MEDCD/DATE	SSN	CAT	END DATE	IRN	LIST	
1 30	LASTNAME1	B C01 Y	03/19/1997	000-00-0001	-			048	
2 354	LASTNAME2	E C01 Y	07/19/1980	000-00-0004	L98-A	12/31/1999	012345678	048	
3 353	LASTNAME3	E C01 Y	07/19/1997	000-00-0032	E02-E	07/31/1999	098765432	041	
4 346	LASTNAME4	J C01 Y	08/19/1978	000-00-0005	S98-D	12/31/1999	102938475	048	
5 345	LASTNAME5	K C01 Y	08/19/1998	000-00-0092	F01-R	06/01/1999	876541234	048	
6 30	LASTNAME7	R C01 Y	04/19/1991	000-00-0064	-			048	
7 338	LASTNAME8	S C01 Y	04/19/1996	000-00-0007	S09-N	05/01/1998	000000000	048	
8 343	LASTNAME10	I C01 Y	08/19/1998	000-00-0015	F01-R	01/01/1999	000000000	048	
9 30	LASTNAME12	R C01 Y	01/19/1999	000-00-0088	S09-N	11/30/1999	000000000	048	
10 353	LASTNAME14	M C01 Y	06/19/1999	000-00-0022	E02-E	12/31/1999	192837465	041	
11								000	
12								000	
13								000	
14								000	
15								000	

ENTER LINE NUMBER FOR OPTIONS: SDX MENU - PF3, EXIT - CLEAR, SVES - PF1

END OF DISPLAY

SSA data on the SDX ACCRETION LIST consists of:

- **DONUM:** The customer's District Office number;
- **NAME:** The customer's last name and first initial;
- **PAYST:** The customer's latest Pay Status (see codes on Pages 35-38);
- **MEDCD:** The customer's Medicaid Eligibility Code (see codes on Page 78);
- **DATE:** The customer's Medicaid Eligibility Date, and
- **SSN:** The customer's Social Security Number.

MMIS data, if present, consists of:

- **CAT:** The MMIS Coverage Group (Appendix C1-C14) and Coverage Type (Appendix C14);
- **END DATE:** The date that the customer's Medical Assistance coverage ends;
- **IRN:** The customer's 9-position CARES Individual Record Number.

System data consists of:

- **DAYS ON LIST:**
The number of days the line item has been on the SDX ACCRETION LIST.
Note: Items on this list over 30 days are NOT in compliance with SSI/MA time processing requirements.

ACCRETION OPTION MENU

The customer information displayed on the **ACCRETION OPTION MENU**, beginning with the "DONUM", is the line item chosen from the list of names on the **DHR SDX ACCRETION LIST**. Please refer to Page 93 for data descriptions.

DATE: MM/DD/YYYY		THE STATE OF MARYLAND			TIME: HH:MM		
DEPARTMENT OF HUMAN RESOURCES							
SDX ONLINE SYSTEM							
ACCRETION OPTION MENU FOR:							
		SSA DATA		MMIS DATA		DAYS ON	
DONUM	NAME	PAYST MEDCD/DATE	SSN	CAT	END DATE	IRN LIST	
354	LASTNAME2	E C01 Y 07/19/1980	000-00-0004	L98-A	12/31/1999	098765432 048	
CHOOSE NUMBER OPTION: _							
1) INQUIRY SCREENS							
2) CHANGE DONUM							
3) RETURN TO LIST							
TO SVES - PRESS PF1		TO EXIT - PRESS CLEAR			SDX MENU - PRESS PF3		

The cursor stops at the "CHOOSE NUMBER OPTION:" prompt. The options are:

- To view customer data on SDX Data Screens (see Page 96), press **1** then <ENTER>.
- To change a District Office Number (DONUM) (see Page 95), press **2** then <ENTER>.
- To return to the Name lists and choose a new customer, press **3** then <ENTER>.
- To return to the SVES menu, press the **PF1** key.
- To exit the program, press the **CLEAR** key on a CIS terminal or the "PAUSE/BREAK" key on a PC workstation.
- To return to the SDX menu, press the **PF3** key.



- 



2. Enter the new District Office Number at the cursor prompt and press the <ENTER> key.
 - The **"DONUM"** change will appear immediately on the **SDX ACCRETION LIST**. The change will appear on SDX Data Screens 1 and 2 after the next SDX system update. The user can further correct the District Office Number by following steps 1 and 2 above.
3. After making and confirming the **"DONUM"** change:
 - To view the current customer's data on SDX Data Screens, press **1** then <ENTER>.
 - To return to the Accretion List of Names and choose a new customer, press **3** then <ENTER>.

SDX DATA SCREENS 1 AND 2 FOR ACCRETIONS

After the user enters the line number alongside the desired name on the **SDX ACCRETION LIST** and presses the <ENTER> key, the system displays **SCREEN 1** (shown on Page 74) with the customer's most current SDX information. Additional customer information is on **SCREEN 2**, shown on Page 84.

SCREEN 1 and **SCREEN 2** are inquiry-only screens. There are no data elements to change. The cursor moves to the **ENTER NEW SSN** line. After viewing data, the user has the following options:

- To return to the SVES menu, press the **PF1** key on a CIS terminal or the **F1** key on a PC workstation).
- To view additional customer information on **SCREEN 2**, Press the **PF8** key on a CIS terminal or the **F8** key on a PC workstation. To return to **SCREEN 1**, press **PF7** on a CIS terminal or the **F7** key on a PC workstation.
- To return to the alphabetized **DHR SDX ACCRETION LIST** (Page 92), press the **PF6** key on a CIS terminal or the **F6** key on a PC workstation).
- To return to the SDX menu, press the **PF3** key or the **F3** key on a PC workstation).
- To exit the program,press the **CLEAR** key or the **"PAUSE/BREAK"** key on a PC workstation.
- To retrieve another customer's SDX record, enter the customers Social Security number **without dashes** at the **"ENTER NEW SSN"** prompt.

Refer to Page 75 for descriptions of the data in **SCREEN 1**, and to Page 85 for descriptions of data in **SCREEN 2**.

OPTION 4 - CLOSING LIST

To display the "CLOSING NAME BROWSE" screen shown below, choose **4** on the SDX Main Menu then press the <ENTER> key.

DATE: MM/DD/YYYY	THE STATE OF MARYLAND	TIME: HH:MM
	DEPARTMENT OF HUMAN RESOURCES	
	SDX ONLINE SYSTEM	
CLOSING NAME BROWSE		
ENTER NAME FOR BROWSE:		
LAST NAME:	_____	
FIRST NAME:	_____	
MIDDLE INITIAL	_	
LIMIT BROWSE TO:		
DONUM:	_____	
MEDICAID ELIG CODE:	_	
PAY STATUS:	_____	
# DAYS PENDING >=	_____	
FOR SVES MENU - PF1		
FOR SDX MENU - PF3		
FOR EXIT - CLEAR		

In this screen, a user can do alphabetic name browsing and limit the browse to a specific District Office, MEDICAID Eligibility Code or SSI Pay Status. Other options are:

- To request a list of cases which have been on the **CLOSING** file greater than or equal to a specific number of days, enter a one to three digit number at the "**# DAYS PENDING >=**" prompt and press <ENTER>.
- To return to the SVES menu, press the **PF1** key.
- To return to the SDX menu, press the **PF3** key.
- To exit the program press the **CLEAR** key ("**PAUSE/BREAK**" key on a PC workstation).

To request the alphabetized **DHR SDX CLOSING LIST** shown on Page 98, enter one of the following options in the **CLOSING NAME BROWSE** screen:

- Several characters of a last name then the <ENTER> key;
- A full last name then the <ENTER> key;
- A last name, <TAB>, a name in the "**FIRST NAME**" field, then <ENTER>, or
- A last name, first name and middle initial in their fields then <ENTER>.

The Closing browse can be further defined by following the **RESTRICTED BROWSING** instructions beginning on Page 72. In the example on Page 98, the user limited the alphabetic name browse to customers:

- Who reside in Prince George's County (**DONUM = 16***);
- Whose eligibilities for MEDICAID have been referred to the State (**MED ELIG CODE = "R"**), and
- Whose SSI has been terminated (**PAY STATUS = T31**).

DHR SDX CLOSING LIST

The **DHR SDX CLOSING LIST**, below, shows those Maryland customers who are no longer eligible for SSI but are active in the SSI category on MMIS. The case manager must delete the customer from SSI status or otherwise correct data in MMIS via CARES. Names are removed from the **DHR SDX CLOSING LIST** only after MMIS is updated to reflect the correct medical assistance program status.

DATE: MM/DD/CCYY			DHR SDX CLOSING LIST				TIME: HH:MM		PAGE: 1	
ACTIVE IN SSI CATEGORY ON MMIS, NOT SSI ELIGIBLE ON SDX										
START SEARCH AT:			NAME LA _____							
LIMIT BY:		DONUM 16* _		MED ELIG CODE R			PAY STATUS T31			
SSA DATA					MMIS DATA				DAYS ON	
DONUM	NAME	PAYST	MEDCD/DATE	SSN	CAT	END DATE	IRN	LIST		
1 16	LASTNAME1	B T31 R	10/01/1994*	000-00-0026	S02-A	09/30/2000	012345678	028		
2 162	LASTNAME2	E T31 R	01/01/1992*	000-00-0032	S02-D	12/31/2000	098765432	046		
3 161	LASTNAME3	E T31 R	06/01/1993	000-00-0067	S02-D	05/31/2001	102938475	028		
4 163	LASTNAME4	J T31 R	02/01/1994	000-00-0085	S02-A	01/31/2001	102938475	005		
5								000		
6								000		
7								000		
8								000		
9								000		
10								000		
11								000		
12								000		
13								000		
14								000		
15								000		
ENTER LINE NUMBER FOR OPTIONS: _				SDX MENU - PF3, EXIT - CLEAR, SVES - PF1						
END OF DISPLAY										

NOTE: An asterisk (*) alongside the **MEDCD/DATE** entry indicates that the customer is "out-of-state" and not under Maryland Jurisdiction.

To request a list of customer records on file for a specific period of time, enter a one to three digit number at the **"DAYS PENDING >="** prompt and press <ENTER>. Refer to Page 92 for an example, and to Page 93 for the resulting screen of cases on the list greater than or equal to 40 days.

To obtain a customer record, enter the desired line item number (shown in green at the left side of the **CLOSING LIST** at the **"ENTER LINE NUMBER FOR OPTIONS"** cursor prompt, then press the <ENTER> key. The system will display the **"CLOSING OPTION MENU FOR:"** screen shown on Page 99 for the desired individual.

The data elements on the **DHR SDX CLOSING LIST** is the same as that described on Page 93 for the **DHR SDX ACCRETION LIST**.

CLOSING OPTION MENU

The "CLOSING OPTION MENU FOR:" screen is similar to and operates the same as the "ACCRETION OPTION MENU FOR:" screen described beginning on Page 94. The customer information displayed in the "CLOSING OPTION MENU FOR:" screen is the line item chosen from the list of names on the **DHR SDX CLOSING LIST**. Please refer to Page 93 for data descriptions.

DATE: MM/DD/YYYY		THE STATE OF MARYLAND				TIME: HH:MM	
DEPARTMENT OF HUMAN RESOURCES							
SDX ONLINE SYSTEM							
CLOSING OPTION MENU FOR:							
SSA DATA				MMIS DATA		DAYS ON	
DONUM	NAME	PAYST MEDCD/DATE	SSN	CAT	END DATE	IRN	LIST
354	LASTNAME2	E C01 Y 07/19/1980	000-00-0004	L98-A	12/31/1999	098765432	048
CHOOSE NUMBER OPTION: _							
1) INQUIRY SCREENS							
2) CHANGE DONUM							
3) RETURN TO LIST							
TO SVES - PRESS PF1			TO EXIT - PRESS CLEAR			SDX MENU - PRESS PF3	

The cursor stops at the "CHOOSE NUMBER OPTION:" prompt. The options are:

- To view customer data on SDX Data Screens (see Page 100), press **1** then <ENTER>.
- To change a District Office Number (**DONUM**), press **2** then <ENTER>.
- To return to the Name lists and choose a new customer, press **3** then <ENTER>.
- To return to the SVES menu, press the **PF1** key on a CIS terminal or the **F1** key on a PC workstation.
- To exit the program, press the **CLEAR** key on a CIS terminal or the "**PAUSE/BREAK**" key on a PC workstation.

The system allows only the **District Office Number** ("**DONUM**") to be changed on the **CLOSE OPTION MENU** screen. To change the District Office Number:

1. Press **"2) CHANGE DONUM"**.
 - The system will alert the user with a message on the **"2 CHANGE DONUM"** line like the following example: **"FROM NNN BY - ABC###"** where **"NNN"** is the current District Office Number and **"ABC###"** is the LOGON ID of the person making the change.
 - The cursor will move to the **"DONUM"** field of the selected line item.

2. Enter the new District Office Number at the cursor prompt and press the <ENTER> key.
 - The **"DONUM"** change will appear immediately on the **SDX CLOSING LIST**. The change will appear on the SDX Data Screens after the next SDX system update. The user can further correct the District Office Number by following steps 1 and 2 above.
3. After making and confirming the **"DONUM"** change:
 - To view the current customer's data on THE SDX Data Screens, press **1** then <ENTER>.
 - To return to the List of Names, press **3** then <ENTER>.

SDX DATA SCREENS 1 AND 2 FOR CLOSINGS

After the user enters the line number alongside the desired name on the **SDX CLOSING LIST** and presses the <ENTER> key, the system displays **SCREEN 1** (shown on Page 74) with the customer's most current SDX information. Additional customer information is on **SCREEN 2**, shown on Page 84.

SCREEN 1 and **SCREEN 2** are inquiry-only screens. There are no data elements to change. The cursor moves to the **ENTER NEW SSN** line. After viewing data, the user has the following options:

- To return to the SVES menu, press the **PF1** key on a CIS terminal or the **F1** key on a PC workstation).
- To view additional customer information on **SCREEN 2**, Press the **PF8** key on a CIS terminal or the **F8** key on a PC workstation. To return to **SCREEN 1**, press **PF7** on a CIS terminal or the **F7** key on a PC workstation.
- To return to the alphabetized **DHR SDX CLOSING LIST** (Page 98), press the **PF6** key on a CIS terminal or the **F6** key on a PC workstation).
- To return to the SDX menu, press the **PF3** key or the **F3** key on a PC workstation).
- To exit the program, press the **CLEAR** key or the **"PAUSE/BREAK"** key on a PC workstation.
- To retrieve another customer's SDX record, enter the customers Social Security number **without dashes** at the **"ENTER NEW SSN"** prompt.

Refer to Page 75 for descriptions of the data in **SCREEN 1**, and to Page 85 for descriptions of data in **SCREEN 2**.

OPTION 5 - CHANGE LIST

To display the **"CHANGE NAME BROWSE"** screen shown below, choose 5 on the SDX Main Menu then press the <ENTER> key.

DATE: MM/DD/YYYY	THE STATE OF MARYLAND	TIME: HH:MM
DEPARTMENT OF HUMAN RESOURCES		
SDX ONLINE SYSTEM		
CHANGE NAME BROWSE		
ENTER NAME FOR BROWSE:		
LAST NAME: _____		
FIRST NAME: _____		
MIDDLE INITIAL: _____		
LIMIT BROWSE TO:	ENTER Y TO SEE:	
	_ DELETED LINES	
DONUM: _____	LIMIT CHANGE CODES WITH Y OR N:	
MEDICAID ELIG CODE: _____	_ N=NAME	
PAY STATUS: _____	_ A=ADDRESS OF RECIPIENT	
# DAYS PENDING >= _____	_ P=PAYEE NAME/ADDRESS	
	_ C=CLAIM NO	
	_ S=SSN	
FOR SVES MENU - PF1		
FOR SDX MENU - PF3		
FOR EXIT - CLEAR		

The **CHANGE NAME BROWSE** screen allows alphabetic name browsing similar to the screens for **ACCRETION NAME BROWSE** (Page 91) and **CLOSING NAME BROWSE** (Page 97), and allows restricted browsing by District Office, MEDICAID Eligibility Code and SSI Pay Status, per the **LIMITED BROWSING** instructions beginning on Page 72. Additionally, this screen provides browsing options that are unique to the Change function:

- To request a list of line items that are pending deletion from the **CHANGES** file, enter the letter "Y" at the "_ DELETED LINES" prompt, then press <ENTER>.
- To request a list of multiple items to be changed, including "NAME", "ADDRESS OF RECIPIENT", "PAYEE NAME/ADDRESS", "CLAIM NUMBER" or "SOCIAL SECURITY NUMBER", enter the letter "Y" at the appropriate "LIMIT CHANGE CODES" prompt, then press <ENTER>. Alternatively, enter the letter "N" to **exclude** undesired change elements.

Other options are:

- To request a list of cases which have been on the **CHANGES** file greater than or equal to a specific number of days, enter a one to three digit number at the "# DAYS PENDING >=" prompt and press <ENTER>. See Page 92 for an example and Page 93 for the resulting list.
- To return to the SVES menu, press the PF1 key.
- To return to the SDX menu, press the PF3 key.
- To exit the program press the **CLEAR** key ("PAUSE/BREAK" key on a PC workstation).

A WORKING EXAMPLE

The following example will help the user understand the **CHANGE NAME BROWSE** screen and introduce the other screens in the **CHANGE** series.

In the example, a FIP case manager in the Hilton Heights district office of Baltimore City is reviewing SSI changes. After logging into CICS and SVES, the caseworker presses **PF5** for the SDX Main Menu, then the number "5" key for the **CHANGE** option to display the **CHANGE NAME BROWSE** screen. The caseworker restricts the browse to the Hilton Heights district office by tabbing to the "DONUM" line and typing in the CARES code number for Hilton Heights, "344". In the "LIMIT CHANGE CODES WITH Y OR N" section, the caseworker inputs the letter "Y" at the "N=NAME", the "A=ADDRESS OF RECIPIENT", and "P=PAYEE NAME/ADDRESS" prompts (alternatively, the caseworker could have entered the letter "N" at the "C=CLAIM NO" and "S=SSN" prompts and no letter at the first three prompts). After reviewing the screen to be sure of capturing all required information, the user presses the <ENTER> key to display the **DHR SDX CHANGES LIST**, described on Page 103.

DHR SDX CHANGES LIST

The **DHR SDX CHANGES LIST**, below, shows those Maryland customers who are active in the SSI category on MMIS and SSI eligible on SDX, but who may require changes in MMIS via CARES.

DATE: MM/DD/CCYY		DHR SDX CHANGES LIST				TIME: HH:MM		PAGE: 1	
ACTIVE IN SSI CATEGORY ON MMIS, AND SSI ELIGIBLE ON SDX									
START SEARCH AT:		NAME				CHG CODES N A P			
LIMIT BY:		DONUM 344		MED ELIG CODE		PAY STATUS			
		SSA DATA		CHG		MMIS DATA		DAYS ON	
DONUM	NAME	PAYST	MEDCD/DATE	CD	SSN	CAT	END DATE	IRN	LIST
1	344 BERFL	F	C01 Y 10/01/1998	A	000-00-0026	S02-D	09/30/2003	012345678	028
2	344 BERFL	F	C01 Y 10/01/1998	N	000-00-0026	S02-D	09/30/2003	012345678	028
3	344 BERFL	F	C01 Y 10/01/1998	P	000-00-0026	S02-D	09/30/2003	012345678	028
4	344 ZONK	R	C01 Y 05/01/1995	A	000-00-5678	S02-D	04/30/2000	987654321	050
5	344 ZONK	R	C01 Y 05/01/1995	P	000-00-5678	S02-D	04/30/2000	987654321	050
6									000
7									000
8									000
9									000
10									000
11									000
12									000
13									000
14									000
15									000

ENTER LINE NUMBER FOR OPTIONS: SDX MENU - PF3, EXIT - CLEAR, SVES - PF1

END OF DISPLAY

In the example above, the **SDX CHANGES LIST** shows three change line items for "BERFL, F" ("A" for ADDRESS OF RECIPIENT, "N" for NAME CHANGE, and "P" for PAYEE NAME AND ADDRESS), and two lines for "ZONK, R" ("A" for ADDRESS OF RECIPIENT, and "P" for PAYEE NAME AND ADDRESS).

To obtain a customer record, enter the desired line item number (shown in green on the left side of the **CHANGES LIST** next to the District Office Number) at the "ENTER LINE NUMBER FOR OPTIONS" cursor prompt, then press the <ENTER> key. The system will display the "CHANGES OPTION MENU FOR:" screen shown on Page 104 for the desired individual.

In the example above, the caseworker enters any one of the three line item numbers for "BERFL" to get that customer's **CHANGES OPTION MENU**.

CHANGES OPTION MENU

The "CHANGES OPTION MENU FOR:" screen is similar to the "ACCRETION OPTION MENU FOR:" screen on Page 94 and the "CLOSING OPTION MENU FOR:" screen on Page 100. The customer line items displayed in the "CHANGES OPTION MENU FOR:" screen are the line items from the list of names on the DHR SDX CHANGES LIST.

DATE: MM/DD/YYYY		THE STATE OF MARYLAND				TIME: HH:MM			
DEPARTMENT OF HUMAN RESOURCES									
SDX ONLINE SYSTEM									
CHANGES OPTION MENU FOR:									
DONUM	NAME	SSA DATA	CHG	MMIS DATA	DAYS ON				
		PAYST MEDCD/DATE	CD	SSN	CAT	END DATE	IRN	LIST	
344	BERFL	F C01 Y 07/19/1980	N	000-00-0026	L98-A	09/30/2003	098765432	048	
344	BERFL	F C01 Y 07/19/1980	A	000-00-0026	L98-A	09/30/2003	098765432	048	
344	BERFL	F C01 Y 07/19/1980	P	000-00-0026	L98-A	09/30/2003	098765432	048	
									000
									000
CHOOSE NUMBER OPTION: _									
1) INQUIRY SCREENS									
2) CHANGE DONUM									
3) RETURN TO LIST									
4) SDX/MMIS CHANGE SCREEN									
5) DELETE CHANGE LINE(S)									
TO SVES - PRESS PF1			TO EXIT - PRESS CLEAR			SDX MENU - PRESS PF3			

The cursor stops at the "CHOOSE NUMBER OPTION:" prompt. The options are:

- To view customer data on Inquiry Screens (Screens 1 or 2), press 1 then <ENTER> (see Pages 74 and 85).
- To change a District Office Number (DONUM), press 2 then <ENTER> (see instructions on Page 107).
- To return to the Name lists and choose a new customer, press 3 then <ENTER>.
- To view information on the SDX/MMIS CHANGE SCREEN, press 4 then <ENTER> (see Page 105).
- To delete Change Line items, press 5 then <ENTER> (see instructions on Page 108).
- To return to the SVES menu, press the PF1 key.
- To exit the program, press the CLEAR key ("PAUSE/BREAK" key on a PC workstation).
- To return to the SDX menu, press the PF3 key.

In the example, the caseworker presses the 4 key to display the SDX/MMIS CHANGE SCREEN on Page 105.

SDX/MMIS CHANGE SCREEN

The **SDX/MMIS CHANGE SCREEN**, below, shows the most current SSA information for the 5 change areas on the right and the next previous SSA information for each of the 5 change areas on the left. Information on the right which is different from that on the left is highlighted in turquoise. The most current MMIS information is at the bottom of the screen. It is the FIA caseworker's responsibility to 1) determine what if any changes need to be made to the MMIS data at the bottom of the **SDX/MMIS CHANGE SCREEN**, 2) make any adjustments to MMIS via CARES, and 3) delete the line item from the **DHR SDX CHANGE LIST** after changes are effective in MMIS.

SSA RUN DATE 09/03/1999		MD STATE DATA EXCHANGE		DHR RUN DATE 11/02/1999	
LDSS 344 B-HILTON HEIGHTS		SDX/MMIS CHANGE SCREEN CHG CODES: N A P			
PREVIOUS SDX DATA		CURRENT SDX DATA			
SSN 000-00-0026	CLAIM # 000-00-0026D	000-00-0026D			
NAME BERFL	FERD	BERFL	FERD	A	
ADDR		2819 SMIDGEN AVE			
		BALTIMORE	MD	21219-	
PAYEE					
MARNA W BERFL FOR		MARNA W BERFL FOR			
FERD A BERFL		FERD A BERFL			
1123 ALE KEG DRIVE		526 GURGLE AVENUE			
SOMEWHEREVILLE	MD	BALTIMORE	MD		
	21015-6245			21286-1234	
MMIS DATA: MA#30067890A110		CLAIM # 000-00-0026D		NAME BERFL FERD A	
HOH NAME MARNA W BERFL		HOH ADDR 1123 ALE KEG DRIVE			
MMIS RUNDATE 10/13/1999					
		SOMEWHEREVILLE MD		21015-6245	
TO SVES MENU - PF1	RETURN TO LIST - PF9				
TO SDX MENU - PF3	TO EXIT - CLEAR	RETURN TO OPTION MENU - PF10			

Note the following events in the example:

- The **CURRENT SDX DATA** column shows that Mr. Berfl has a middle initial, "A". This is a change from previous SDX data, which shows no middle initial. The MMIS record, however, does show a middle initial; therefore, no "Name" category change is necessary on MMIS.
- The previous SDX data shows no address for Mr. Berfl. The customer may have resided with Marna W. Berfl at the Ale Keg Drive address in Somewhereville. Current SDX data shows that Mr. Berfl has a new address in Baltimore city. The caseworker performs the necessary research to verify that the customer address information showing under **CURRENT SDX DATA** is the correct address. The caseworker performs the necessary steps in CARES to change the customer's Address on MMIS.

- The address for the payee, **MARNA W. BERFL**, has changed as of the last **SSA RUN DATE**, **09/03/1999**. The **MMIS DATA** section of the screen shows the Payee's previous address information with an **MMIS RUNDATE** of **10/13/1999**. The caseworker performs the necessary research to verify that the payee address information showing under **CURRENT SDX DATA** is the correct payee address. The caseworker performs the necessary steps in CARES to change the Payee Address on MMIS.
- The caseworker notices that there is no highlighted **SSN**, nor is there a highlighted **CLAIM #**. This is because there were no changes to this data.
- In approximately two weeks, the caseworker queries the SDX system to see if the **PAYEE** address change has taken effect in MMIS. If the address is changed and the change is correct, the caseworker deletes the line item from the **SDX CHANGE LIST** per instructions on Page 108. If the change is not correct, the caseworker should resubmit the change to MMIS via CARES. If the address has not changed or is still incorrect after a subsequent input, the caseworker should notify a supervisor and the designated systems person per instructions on Page 3.

On the **CHANGES OPTION MENU** screen, the system allows either a change to the **District Office Number ("DONUM")** or a request to delete line items. No other data changes are permitted.

1. To change the District Office Number:

a. Press **2** then **<ENTER>**.

- The system will alert the user with a message on the **"2 CHANGE DONUM"** line like the following example: **"FROM NNN BY - ABC###"** where **"NNN"** is the current District Office Number and **"ABC###"** is the LOGON ID of the person making the change.
- The cursor moves to the **"DONUM"** field of the selected line item.

DATE: MM/DD/YYYY		THE STATE OF MARYLAND				TIME: HH:MM			
DEPARTMENT OF HUMAN RESOURCES									
SDX ONLINE SYSTEM									
CHANGES OPTION MENU FOR:									
DONUM	NAME	SSA DATA	CHG	MMIS DATA	DAYS ON				
		PAYST	MEDCD/DATE	CD	SSN	CAT	END DATE	IRN	LIST
344	BERFL	F C01 Y	07/19/1980	N	000-00-0026	L98-A	09/30/2003	098765432	048
344	BERFL	F C01 Y	07/19/1980	A	000-00-0026	L98-A	09/30/2003	098765432	048
344	BERFL	F C01 Y	07/19/1980	P	000-00-0026	L98-A	09/30/2003	098765432	048
									000
									000
CHOOSE NUMBER OPTION: 2									
1) INQUIRY SCREENS									
2) CHANGE DONUM FROM NNN BY - ABC###									
3) RETURN TO LIST									
4) SDX/MMIS CHANGE SCREEN									
5) DELETE CHANGE LINE(S)									
TO SVES - PRESS PF1			TO EXIT - PRESS CLEAR				SDX MENU - PRESS PF3		

b. Enter the new District Office Number at the cursor prompt and press the **<ENTER>** key.

- The system immediately displays the **DHR SDX CHANGES LIST** and shows the changed **"DONUM"** in green.
- The change will appear on the SDX Data Screens after the next SDX system update with an indication that the information has been changed and the LOGON ID of the worker making the change.

3. To see a list of deleted items:
 - a. Go to the **CHANGE NAME BROWSE** screen (see Page 101).
 - b. Insert the letter "Y" at the **DELETED LINES** prompt.
 - c. Insert the District Office Number at the "**DONUM**" prompt.
 - d. Press the <ENTER> key to display the **DHR SDX CHANGES LIST** with deleted items.

The system will display the following **SDX CHANGES LIST DEL-LINES** screen with deleted items:

DATE: MM/DD/CCYY		DHR SDX CHANGES LIST DEL-LINES					TIME: HH:MM		PAGE: 1	
ACTIVE IN SSI CATEGORY ON MMIS, AND SSI ELIGIBLE ON SDX										
START SEARCH AT:		NAME BERFL					CHG CODES N A P			
LIMIT BY:		DONUM 344		MED ELIG CODE		PAY STATUS		DELETED LINES		
		SSA DATA		CHG		MMIS DATA		DAYS ON		
DONUM	NAME	PAYST	MEDCD/DATE	CD	SSN	CAT	END DATE	IRN	LIST	
1 344	BERFL	F C01 Y	10/01/1998	N	000-00-0026	S02-D	09/30/2003	012345678	028	
2 344	BERFL	F C01 Y	10/01/1998	A	000-00-0026	S02-D	09/30/2003	012345678	028	
3 344	BERFL	F C01 Y	10/01/1998	P	000-00-0026	S02-D	09/30/2003	012345678	028	
4									000	
5									000	
6									000	
7									000	
8									000	
9									000	
10									000	
11									000	
12									000	
13									000	
14									000	
15									000	
ENTER LINE NUMBER FOR OPTIONS:				SDX MENU - PF3, EXIT - CLEAR, SVES - PF1						
END OF DISPLAY										

Where necessary, items deleted from the **SDX CHANGES LIST** can be undeleted in the following manner:

1. Enter "Y" at the **DELETED LINES** prompt in the **CHANGE NAME BROWSE** screen..
2. Enter the District Office Number at the "**DONUM**" prompt then press the <ENTER> key to display the **SDX CHANGES LIST** of deleted items.
3. Locate and enter the desired line number at the **ENTER LINE NUMBER FOR OPTIONS:** prompt then press the <ENTER> key to display the **CHANGES OPTION MENU FOR:** screen with the line items to be undeleted.
 - The cursor will be at a prompt to the left of the District Office Number ("**DONUM**")

DATE: MM/DD/YYYY		THE STATE OF MARYLAND				TIME: HH:MM			
DEPARTMENT OF HUMAN RESOURCES									
SDX ONLINE SYSTEM									
CHANGES OPTION MENU FOR:									
	SSA DATA	CHG	MMIS DATA				DAYS ON		
DONUM	NAME	PAYST MEDCD/DATE	CD	SSN	CAT	END DATE	IRN	LIST	
U 344	BERFL	F C01 Y 07/19/1980	N	000-00-0026	L98-A	09/30/2003	098765432	048	
-								000	
-								000	
-								000	
-								000	
CHOOSE NUMBER OPTION: <u>5</u>									
1) INQUIRY SCREENS									
2) CHANGE DONUM									
3) RETURN TO LIST									
4) SDX/MMIS CHANGE SCREEN									
5) UNDELETE CHANGE LINE(S)									
ABC###									
TO UNDELETE THIS CHANGE LINE,									
PRESS "U" & PRESS PF4									
TO SVES - PRESS PF1			TO EXIT - PRESS CLEAR			SDX MENU - PRESS PF3			

4. Press the 5 key to select the UNDELETE CHANGE LINE(S) option.
 - The system will alert the user with a message on the "5 UNDELETE CHANGE LINE(S)" line like the following example:

"ABC###" (where "ABC###" is the LOGON ID of the person making the change), followed on the next two lines with:

"TO UNDELETE CHANGE LINE

PRESS "U" & PRESS PF4"
 - The cursor will move to the leftmost position on the first line of changes.
5. Press the letter "U" then the PF4 key.
 - The system will immediately display the DHR SDX CHANGE LIST DEL-LINES screen. The line item is restored to the CHANGE LIST and is removed from the list of deleted items.

2. To delete Change Lines:

- a. Press 5 then <ENTER>.
 - The system will alert the user with a message on the "5 DELETE CHANGE LINE(S)" line like the following example:
 "ABC###" (where "ABC###" is the LOGON ID of the person making the change), followed on the next two lines with:
 "TO DELETE CHANGE LINES(S)
 PLACE "D" IN FRONT OF LINE(S), & PRESS PF4"
 - The cursor will move to the leftmost position on the first line of changes.
- b. Enter the letter "D" on each line item to be deleted (lower or uppercase character - this field is not case sensitive).
- c. After marking each item to be deleted with the letter "D" press the PF4 key.
 - The designated items disappear immediately from the DHR SDX CHANGES LISTS.

DATE: MM/DD/YYYY		THE STATE OF MARYLAND				TIME: HH:MM			
DEPARTMENT OF HUMAN RESOURCES									
SDX ONLINE SYSTEM									
CHANGES OPTION MENU FOR:									
		SSA DATA		CHG		MMIS DATA		DAYS ON	
DONUM	NAME	PAYST	MEDCD/DATE	CD	SSN	CAT	END DATE	IRN	LIST
d 344	BERFL	F C01 Y	07/19/1980	N	000-00-0026	L98-A	09/30/2003	098765432	048
D 344	BERFL	F C01 Y	07/19/1980	A	000-00-0026	L98-A	09/30/2003	098765432	048
d 344	BERFL	F C01 Y	07/19/1980	P	000-00-0026	L98-A	09/30/2003	098765432	048
									000
									000
CHOOSE NUMBER OPTION: 5									
1) INQUIRY SCREENS									
2) CHANGE DONUM									
3) RETURN TO LIST									
4) SDX/MMIS CHANGE SCREEN									
5) DELETE CHANGE LINE(S)									
ABC###									
TO DELETE CHANGE LINES(S),									
PLACE "D" IN FRONT OF LINE(S), & PRESS PF4									
TO SVES - PRESS PF1			TO EXIT - PRESS CLEAR				SDX MENU - PRESS PF3		