



State of California—Health and Human Services Agency
Department of Health Care Services



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Medi-Cal Eligibility Division Information Letter No.: I 21-24

TO: ALL COUNTY WELFARE DIRECTORS
ALL COUNTY ADMINISTRATIVE OFFICERS
ALL COUNTY MEDI-CAL PROGRAM SPECIALISTS/LIAISONS

SUBJECT: REMINDERS REGARDING THE PICKLE, DISABLED ADULT CHILD,
AND DISABLED WIDOW/ERS PROGRAMS

The purpose of this Medi-Cal Eligibility Division Information Letter (MEDIL) is to provide counties with reminders regarding the assessment and processing of applications/renewals for individuals eligible for the Pickle, Disabled Adult Child (DAC) and Disabled Widow/ers (DW) programs.

This letter reminds County Eligibility Workers (CEWs) of the steps required to identify, assess, and determine eligibility for individuals who appear to meet the criteria for these programs. This letter will also provide tips for what to look for in the Medi-Cal Eligibility Data System (MEDS) while assessing and completing the eligibility determination for these programs.

When to Assess for Pickle, DAC, and DW

CEWs shall ensure all aged, blind, and disabled individuals receiving Social Security Title II income are assessed for the Pickle, DAC, and DW programs at the following times:

- Application
- Annual Renewal
- Change-in-Circumstance Renewal
 - *This includes the start of Medicare eligibility and when a change is reported*
- When an individual is recently discontinued from Supplemental Security Income (SSI) /State Supplementary Payment (SSP) and/or an individual recently received Title II income for the first time

- When an individual who was previously on Pickle/DAC/DW is recently determined to have a share of cost (SOC)
- In the month after a Social Security Title II Cost-of-Living Adjustment (COLA)
- Discontinued SSI/ SSP beneficiaries who require a redetermination under Craig v. Bonta.
- Following a break-in-aid
- Inter-County Transfer (ICT)
- Upon request

Pickle, DAC, and DW are programs in the mega mandatory category of the Medi-Cal hierarchy set forth in [ACWDL 17-03](#). Accordingly, an applicant/beneficiary must have eligibility determined for these programs prior to being evaluated for other programs, such as Modified Adjusted Gross Income (MAGI) or the Aged, Blind, and Disabled Federal Poverty Level Program. Eligibility shall be determined for each group where the applicant/beneficiary has potential Medi-Cal eligibility. When an applicant or beneficiary is eligible for more than one Medi-Cal program, the applicant or beneficiary must be placed into the Medi-Cal program that is the most beneficial.

Assessment Process

CEWs shall complete the following process for assessing individuals potentially eligible for the Pickle, DAC, and DW programs:

1. Assess for aged, blind, or disabled individuals;

Age, blindness, or disability status may be reported on the Medi-Cal application, in person, via telephone, by mail, online, or via email. It is the responsibility of the CEW to verify the information reported by the individual, especially if there is conflicting information. As a reminder, CEWs should complete an ex parte review prior to requesting verifications from an individual.

2. Identify the receipt of Social Security Title II income;

There are numerous ways to identify if an individual is receiving Social Security Title II income including, but not limited to, the following:

- Application
- Social Security Award Letter
- Income Eligibility Verification System (IEVS)
- MEDS

- Applicant/Beneficiary reporting

3. Review the Pickle Tickler field in MEDS

The Pickle Tickler field on the Other Client Eligibility Information (INQE) screen in MEDS is a helpful indicator during the assessment process. This field can assist in identifying a potential Pickle, DAC, or DW individual.

The following are the most common codes displayed in the Pickle Tickler field and are used to identify individuals potentially eligible for the Pickle, DAC, and DW programs:

- Pickle: C1, C0, X1, X0
- DAC: T1, T0
- DW: W0

It is important to remember that even if the Pickle Tickler field is blank, the CEW shall continue the assessment process for Pickle, DAC, and DW. The absence of information in the Pickle Tickler field does not mean the absence of program eligibility.

For a complete list of Pickle Tickler field codes, please refer to the MEDS Network User Manual, Quick Reference Guide along with the Pickle Handbook.

4. Determine if the individual meets program specific criteria

Pickle, DAC, and DW have many similarities when determining eligibility; however, each program has its own requirements. Therefore, it is important to assess **all** potentially eligible individuals for all three programs. An individual shall meet all of the specific program criteria to be eligible for the Pickle, DAC, or DW programs.

The eligibility criteria for each program is outlined below:

- Pickle Program Eligibility Criteria
 - Currently receiving Social Security Title II benefits;
 - Entitled to receive Social Security Title II benefits and SSI/SSP benefits simultaneously in any month after April 1977;
 - Discontinued from SSI/SSP as a result of becoming entitled to Social Security benefits on or after July 1, 1987, or because of an

increase in such benefits; Meets other SSI eligibility requirements, except for income due to Social Security COLAs;

Reminder: Social Security Title II Benefits include: retirement benefits, survivors benefits, and disability benefits.

Please note, the applicant does not have to show that they actually lost their SSI due to a Social Security COLA. The applicant needs to show that but for the COLA increase, they would currently be eligible for SSI.

- *DAC Program Eligibility Criteria*
 - At least 18 years old;
 - Previously received SSI/SSP on the basis of blindness or disability that began before age 22;
 - Currently receiving Social Security Child's (DAC) benefits under Social Security Title II on the basis of blindness or disability; and
 - The individual does not need to have received DAC benefits prior to age 22, but needs to be currently in receipt of DAC benefits.
 - Discontinued from SSI/SSP as a result of the following:
 - Becoming entitled on or after July 1, 1987 to Social Security DAC benefits for the first time; or
 - An increase in DAC benefits, such as a COLA
- *DW Program Eligibility Criteria*
 - Aged 50-64
 - Eligible for and currently receiving any widow(er)s benefits under Social Security Title II Section 202;
 - **Not** entitled to Medicare Part A hospital insurance;
 - Ineligible for SSI/SSP due to the receipt of Social Security Title II Widow(er)s benefits.
 - Received SSI in the month before their widow(er) disability benefits or early retirement benefits began

Eligibility Criteria in MEDS

There are several different screens in MEDS where a CEW can look for information in order to determine potential Pickle, DAC, and DW eligibility. The screens and the information they provide are explained below.

Again, the absence of information in these screens does not indicate the absence of program eligibility. Counties shall assess all potentially eligible individuals for all three programs, even if MEDS does not have confirming information. In those cases, a CEW will need to request additional verification from their local SSA office or the individual in order to correctly determine eligibility for the Pickle, DAC, and DW programs.

INQM Screen

The main screen contains the two digit Pickle indicator code. The first digit is the Pickle type and the second digit is the Pickle status.

INQE Screen

As stated previously, it is important to review the Pickle Tickler field on the INQE screen when assessing for potential Pickle, DAC, and DW eligibility. The INQE screen also displays the “SSI Last Received” date, which is utilized to calculate a potential Pickle eligible’s Pickle Disregard amount and verify that a potential Pickle, DAC, or DW received SSI/SSP benefits and Title II benefits concurrently.

INQX Screen

CEWs can also refer to the Title XVI—SSI/SSP Information (INQX) screen in MEDS to locate the date an individual was determined disabled by the Social Security Administration (SSA). The disability onset information is located in the “Other Information” section and is crucial when determining potential DAC eligibility, as an individual must be determined disabled before 22 years of age.

INQT Screen

The Beneficiary Earnings and Data Exchange (BENDEX) Title II Information (INQT) screen in MEDS displays information regarding an individual’s Social Security Title II benefits. If the individual is currently receiving Title II benefits, the past and current amounts will be reflected on this screen. The last digit(s) of the claim number indicates what type of benefits the individual is receiving. A claim number is comprised of a Social Security Number followed by a letter code. There are also instances when the letter code is followed by a number.

Below are examples of common letter codes CEWs should look for when assessing individuals for the Pickle, DAC, and DW programs:

<u>Code</u>	<u>Identification</u>
A	Primary claimant (wage earner)
C1-C9	Child-Includes minor, student, or disabled child, noting that the "C" code reflects a DAC recipient and DAC individuals are at least 18 years of age and not minor children.
W	Disabled Widow
W1	Disabled Widower

The information above is not a complete list of letter codes. For more comprehensive information, visit www.socialsecurity.gov.

ISDX Screen

The State Data Exchange (ISDX) Inquiry screens display similar information to that of the INQX screen. However, additional information can be found, such as the individual's SSI application date and California residency date. Furthermore, the disability determination can also be found.

It is important to remember that not every individual will have information populated in the above-mentioned screens in MEDS. Again, the absence of information does not indicate the absence of program eligibility. There will be times when a CEW will need to request additional verification from their local SSA office or the individual in order to correctly determine eligibility for the Pickle, DAC, and DW programs. This is also true if the information that does or does not appear in MEDS conflicts with the information the individual is self-attesting to.

Please note: While the ISDX screen contains helpful information when assessing and determining eligibility for the Pickle, DAC, and DW programs, not all CEWs have access to this screen. It is up to each individual county to decide what level of MEDS access is necessary for their staff to carry out the appropriate assessment steps.

Eligibility Determination Process

The eligibility determination process for the Pickle, DAC, and DW programs is similar. Each program requires a resource determination, an income disregard determination,

and a financial eligibility determination. However, there are distinct differences between the disregard determinations and financial eligibility determinations between each program.

Counties shall refer to the Pickle Handbook for detailed instructions on the eligibility determination processes for each program. Below are the sections of the Pickle Handbook where CEWs can locate specific information for each program:

Section 5: Disabled Widow(er)s

Section 6: Disabled Adult Children

Section 8: Resource Eligibility

Section 10: Income—Provides an overview of the Pickle financial eligibility process

Section 15: Procedures—Outlines the Pickle eligibility process as a whole

Case Narratives

Case narratives are a vital part of the eligibility determination process. It is crucial for a CEW to assess for eligibility for the DAC program before evaluating for the Pickle program, as the DAC program allows a disregard of the applicant or beneficiary's Title II DAC income from their parent's or grantparent's record. It is important that DACs maintain their eligibility in the DAC program and do not transition to other programs. The CEW shall document the actions taken on a case so that other CEWs who work the case in the future will have a clear picture of what happened and why.

DHCS recommends the following information regarding the Pickle, DAC, and DW programs be included in the case narrative:

- Reason for assessment
 - Is an application/annual renewal being processed?
 - Was there a change in circumstance that prompted the assessment?
 - Was the individual recently discontinued from SSI/SSP?
 - Did the individual begin receiving Social Security Title II income for the first time?
 - Is the individual reapplying after a break-in-aid?
 - Was the individual previously on Pickle/DAC/DW and recently determined to have a SOC?
 - Did the individual specifically request a Pickle, DAC, or DW assessment?

- Information found in MEDS
 - When did the individual last receive SSI/SSP?
 - Did the individual receive SSI/SSP and Social Security Title II benefits at the same time?
 - When was the individual determined disabled? At what age?
 - What type of Social Security Title II income is the individual receiving?
 - Is the Pickle Tickler field populated? If so, with what code?
- Results of assessment
 - Does the individual meet any of the Pickle, DAC, or DW program criteria?
 - Which criteria do they meet?
 - Are they potentially eligible for any of the programs? Why or why not?
- Eligibility determination information
 - Was a Pickle, DAC, DW eligibility determination completed?
 - Is the individual eligible for any of the programs? If so, which one?
 - If the individual is ineligible, what are the reasons?
 - If ineligible for Pickle, DAC, or DW, what other program is the individual eligible for?
 - What aid code was granted?
 - Was a NOA sent to the individual?

The above list is not exhaustive. If a CEW feels additional information is necessary to preserve the history of the case, that information should be included in the case narrative.

Eligibility Forms and Notices of Action

The eligibility forms for the Pickle, DAC, and DW programs are located on the DHCS website at: <https://www.dhcs.ca.gov/formsandpubs/forms/Pages/Medi-CalForms.aspx>. The NOAs for these programs are located on the MEDS Homepage.

Below is a list of the eligibility forms and NOAs for the Pickle, DAC, and DW programs:

Forms: (on DHCS Website)

- DHCS 7019-Financial Eligibility Worksheet (Pickle Child)
- DHCS 7020-Screening Worksheet

- DHCS 7021-Financial Eligibility Worksheet
- DHCS 7029-Pickle Disregard Computation
- DHCS 7037-Pickle Resource Worksheet
- DHCS 7044-Statement of Living Arrangements
- DHCS 7075-Pickle Needs Test
- DHCS 7089-Screening Worksheet (DW)
- MC 210B-Supplement to Statement of Facts

(Pickle) NOAs: (on MEDS homepage)

- DHCS 7026-Denial/Disc (Pickle/DAC)
- DHCS 7027-Pickle/DAC Approval
- MC 239 DW1-Notice of MC Eligibility (DW)
- MC 239 DW2-MC Denial/Disc (DW)

Please note: Not all CEWs have access to the MEDS homepage. Staff may need to consult with their county MEDS coordinator to retrieve the NOAs from the homepage.

Other Reminders

Pickle, DAC, DW Assessment Page

If the SAWS utilized by the county has a Pickle, DAC, DW assessment page in their system, ensure this page is fully completed with the correct information. This page uses the information populated to signal to the system that an individual is a potential Pickle, DAC, or DW. Failure to complete this page, or incorrect completion of this page may result in an incorrect eligibility determination.

SSI/SSP Screens

CEWs shall ensure that the SSI/SSP information screens in SAWS are fully completed. Some eligibility systems rely on the information from the SSI/SSP screen to determine eligibility for a potential Pickle, DAC, or DW individual. It is important for CEWs to complete all portions of this screen to ensure eligibility is correctly determined.

Social Security Income Coding

If the SAWS utilized by the county has different Social Security Title II income coding options, ensure the correct type is chosen. If a CEW chooses the incorrect income option, this may result in an incorrect eligibility determination. For example, if a CEW chooses the “Social Security-Survivors” income option rather than “Social Security-DAC” income option, the system will fail to determine eligibility for the DAC program.

Reviewing Budget Screens

It is also best practice for CEWs to review the budget screens in SAWS prior to accepting the results. By doing so, CEWs can catch eligibility errors prior to granting benefits. If a CEW expects an individual to be eligible for a Pickle, DAC, or DW aid code and the budget screens are not reflecting the correct information, this should prompt the CEW to go back into the case and ensure the income, SSI/SSP, and assessment pages are completed correctly.

Monthly Lists

Counties will begin receiving monthly lists of individuals that appear to be DAC eligible, but have incorrect eligibility determinations

DHCS will send a list to each county of individuals who have been identified as potential DAC's that require a DAC eligibility determination for the current month and ongoing. Counties will have one month from the date the list is sent to complete an eligibility determination and report the status of the eligibility determination to DHCS. Additional information regarding these monthly lists is forthcoming.

If you have any questions or if we can provide further information, please contact Minel Tobertga at (916) 345-8075, or by email at Minel.Tobertga@dhcs.ca.gov.

Original Signed by:

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