



November 5, 1996

GENERAL LETTER NO. 14-E-6

ISSUED BY: Bureau of Policy Analysis, Division of Policy Coordination

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI State Data Exchange*, Title page, revised; Contents (page 1), revised; SDX form 8036, revised; and pages 1 through 51, revised.

Summary

- ◆ The sentence "This designation is not displayed on the SDXD screen" has been removed from TREAS on page 5 because this information is now displayed in certain situations.
- ◆ A new field, TREASURY DATE, has been added to all four SDXD display screens, pages 48 through 50. This designation will appear only when the screen is updated from a treasury tape.
- ◆ New fields, TELEPHONE NUMBER and ZIP + 4, have been added to the SDX form 8036 and are reflected on the sample SDX form 8036 (between pages 2 and 3), and on page 9.
- ◆ A new field, TELEPHONE, has been added to the SDXD Name/Address screen (PF2) and is reflected on page 48.
- ◆ The statutory reference for parole status under the ALIEN CODE has been corrected, and the word "legal" has been changed to "lawful" on page 9.
- ◆ Additional RACE codes have been added on page 12.
- ◆ A new RECIPIENT TYPE, Ineligible Spouse, has been added on page 14.
- ◆ A new PAYMENT STATUS code, N18, has been added on page 19.
- ◆ A new PAYMENT STATUS code, S01, has been added on page 21.
- ◆ A new THIRD PARTY CODE, Q, has been added on page 25.
- ◆ Five new APPEAL CODES, K through O, have been added on page 27.
- ◆ Three new UNEARNED INCOME TYPE codes, G, O, and W, have been added on pages 34 and 35.
- ◆ Two new fields, ZEBLEY CODE and INSTITUTIONALIZATION CODE, have been added to the SDX display screen and form 8036 and are described on the sample SDX form 8036 (between pages 2 and 3), and on page 46.

- ◆ A new field, INSTITUTIONALIZATION CODE, has been added to the SDXD display screens reflected on page 50.
- ◆ ADC has been changed to FIP and the manual reference has been updated on page 43.
- ◆ On pages with revisions, the spelling of the word “cancelled” has been changed to “canceled” to conform with X-Pert; roman numeral manual references have been updated; manual references have been updated. Several cosmetic changes have been made throughout the chapter.
- ◆ The numbers in parenthesis after the data element names have been changed to reflect the new Social Security Administration SDX record format. (This is for central office use only.)

Effective Date

This manual material is effective upon receipt.

Material Superseded

Remove entire Title 14, Chapter E, from Employees’ Manual and destroy it. This includes Title page, Contents (page 1), form 8036, and pages 1 through 52.

Additional Information

Refer questions about this general letter to your regional benefit payment administrator.



February 17, 1998

GENERAL LETTER NO. 14-E-7

ISSUED BY: Bureau of Eligibility/Hipp, Division of Medicaid Services

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI State Data Exchange*, Contents (page 1), revised; pages 1 through 4, revised; and pages 2a through 2e, new.

Summary

With the implementation of X-PERT, the SDX process has been changed. Information about the changed process has been included in this revision as well as minor revisions to clarify existing procedures.

The Department is implementing an automated process to send and track the receipt of the MA-2124 form, *Medicaid Information Questionnaire for SSI Persons*, for certain new SSI cases and to establish Medicaid eligibility when no further information is needed from the client. This process will occur whether or not you are using X-PERT for your eligibility work.

A new screen on XABC, called SDXT, has been developed for tracking the receipt of the MA-2124. Another new feature is that this screen will cause mainframe to send form 470-3193, *SSI Medicaid Reminder*, to the client when the MA-2124 is not returned.

Enter the receipt date of the MA-2124 on the SDXT screen even if you do not use X-PERT for your eligibility work.

When your case is not selected for the automated process and you do not use the X-PERT process yet, ABC is available for you to record the Medicaid eligibility. Also, you can enter "V" in the retroactive Medicaid field on TD05 to send the *Reminder* to your client when you have previously sent the MA-2124 and it has not been returned.

Effective Date

These changes are effective with the implementation of X-PERT.

Material Superseded

Remove from Employees' Manual, Title 14, Chapter E, Contents (page 1) and pages 1 through 4, all dated November 5, 1996, and destroy them.

Additional Information

Refer questions about this general letter to your regional benefit payment administrator.



THOMAS J. VILSACK, GOVERNOR
SALLY J. PEDERSON, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
JESSIE K. RASMUSSEN, DIRECTOR

September 12, 2000

GENERAL LETTER NO. 14-E-8

ISSUED BY: Office of Policy Analysis, Division of Policy and Rules Integration

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*, Contents (page 1), revised; and pages 2a through 2d, 3, 4, 5, 6, 10, 19, 24, 25, 26, 39, and 43, revised.

Summary

This chapter is revised to reflect the following changes:

- ◆ Removal of the X-PERT entry information from the chapter.
- ◆ Renumbering of forms:
 - MA-2124-0, *Medicaid Information Questionnaire for SSI for Persons*, as 470-2304.
 - MA-4046-1, *Request for Special Update*, as 470-0397.
- ◆ Addition of a new PAYMENT STATUS code: N24, Nonpayment. Administrative sanctions penalty imposed because claimant has provided false or misleading statements to obtain benefits.
- ◆ Addition of a new MEDICAID ELIGIBILITY code: N, Eligible for Medicaid (N24 payment status only).

Effective Date

Upon receipt

Material Superseded

Remove the following pages from Employees' Manual, Title 14, Chapter E, and destroy them:

<u>Page</u>	<u>Date</u>
Contents (page 1)	February 17, 1998
2a-2d, 3, 4	February 17, 1988
5, 6, 10, 19, 24-26, 39, and 43	November 5, 1996

Additional Information

Refer questions about this general letter to your regional benefit payment administrator.



STATE OF IOWA

THOMAS J. VILSACK, GOVERNOR
SALLY J. PEDERSON, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
JESSIE K. RASMUSSEN, DIRECTOR

May 1, 2001

GENERAL LETTER NO. 14-E-9

ISSUED BY: Office of Policy Analysis, Division of Policy and Rule Integration
Bureau of Eligibility Services, Division of Medical Services

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*,
pages 2, 15, 17 through 27, and 49, revised; page 26a, new; and example of
SDX Form 8036, revised.

Summary

Revisions to this chapter:

- ◆ Revise the explanation of payment status codes N31, N32, N42, and N43 to assist workers in determining when to deny Medicaid based on an SSI denial. Changes clarify when medical impairments have been evaluated in the disability process for SSI, so workers can correctly determine when an MEPD application should be denied based on an SSI disability denial.

In determining disability under the Medicaid for employed people with disabilities (MEPD) coverage group, a disability determination is completed even if the person works. If the person is determined to have a severe medical impairment but does not meet or equal a listing of medical impairments, the next two steps of the disability determination process look at a person's ability to work ("substantial gainful activity").

However, if the person's impairment does not meet the listing, the person is not considered disabled for MEPD, regardless of whether there is an ability to work.

- ◆ Update the example of SDX Form 8036 and the screen on page 49, as well as the field descriptions, to reflect the addition of two new fields for the appeal decision date and code.
- ◆ Add payment status codes E02, M02, N22, N23, N25, N52, N53, N55, N56, T32, and T33, and their definitions, on pages 17 through 22.
- ◆ Change the appeal codes and definitions.
- ◆ Correct the reference to 8-F, on page 2.

Effective Date

Upon receipt.

Material Superseded

Remove the following pages from Employees' Manual, Title 14, Chapter E, and destroy them:

<u>Page</u>	<u>Date</u>
2, 2e*	February 17, 1998
Form 8036 (after p. 4)	Undated
15, 17, 18	November 5, 1996
19	September 12, 2000
20-23	November 5, 1996
24-26	September 12, 2000
27, 49	November 5, 1996

* Inadvertently omitted from the material superseded by General Letter 14-E-8

Additional Information

Refer questions about this general letter to your regional benefit payment administrator.



STATE OF IOWA

THOMAS J. VILSACK, GOVERNOR
SALLY J. PEDERSON, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
JESSIE K. RASMUSSEN, DIRECTOR

May 29, 2001

GENERAL LETTER NO. 14-E-10

ISSUED BY: Bureau of Policy Analysis, Division of Policy and Rule Integration

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*, pages 34, 35, and 36, revised.

Summary

This chapter is revised to reflect the following changes to unearned income coding, which were implemented by the Social Security Administration on April 21, 2001:

- ◆ Addition to the definitions of two unearned income type codes:
 - Code G, Title II income used to offset SSI
 - Code W, Title II income used in windfall offset computations
- ◆ Addition of a new unearned income type code: U, concurrent and Title II only attorney's fees, and the code's definition.

Effective Date

Upon receipt.

Material Superseded

Remove from Employees' Manual, Title 14, Chapter E, pages 34, 35, and 36, dated November 5, 1996, and destroy them.

Additional Information

Refer questions about this general letter to your regional benefit payment administrator.



STATE OF IOWA

THOMAS J. VILSACK, GOVERNOR
SALLY J. PEDERSON, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
KEVIN W. CONCANNON, DIRECTOR

July 8, 2003

GENERAL LETTER NO. 14-E-11

ISSUED BY: Office of Policy Analysis

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*,
page 10, revised.

Summary

This chapter is revised to update a reference and field name found in section, "Identification" under ALIEN CODE (41).

Effective Date

Upon receipt.

Material Superseded

Remove from Employees' Manual, Title 14, Chapter E, page 10, dated September 12, 2000, and destroy it.

Additional Information

Refer questions about this general letter to your area income maintenance supervisor 2.



STATE OF IOWA

THOMAS J. VILSACK, GOVERNOR
SALLY J. PEDERSON, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
KEVIN W. CONCANNON, DIRECTOR

March 30, 2004

GENERAL LETTER NO. 14-E-12

ISSUED BY: Office of Policy Analysis

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*, Contents (page 1), revised; and pages 1, 2a through 2d, 4, 10, 12, 15, 23, 25, 29, 30, 31, and 36, revised.

Summary

This chapter is revised to:

- ◆ Change the program name of "Food Stamps" to "Food Assistance".
- ◆ Correct information for the automated SDX process for new SSI-related Medicaid cases.
- ◆ Add to the SDXT screen the fields COUNTY and WORKER.
- ◆ Correct information for the manual SDX process for SSI-related Medicaid cases.

Effective Date

Upon receipt.

Material Superseded

Remove the following pages from Employees' Manual, Title 14, Chapter E, and destroy them:

<u>Page</u>	<u>Date</u>
Contents (page 1)	September 12, 2000
1	February 17, 1998
2a-2d, 4	September 12, 2000
10	July 8, 2003
12	November 5, 1996
15, 23, 25	May 1, 2001
29, 30, 31	November 5, 1996
36	May 29, 2001

Additional Information

Refer questions about this general letter to your area income maintenance supervisor 2.



STATE OF IOWA

THOMAS J. VILSACK, GOVERNOR
SALLY J. PEDERSON, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
KEVIN W. CONCANNON, DIRECTOR

March 11, 2005

GENERAL LETTER NO. 14-E-13

ISSUED BY: Office of Policy Analysis

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*,
page 31, revised.

Summary

This chapter is revised to clarify what the income amount located in the DEEMED field means and what actions may be required.

Effective Date

Immediately.

Material Superseded

Remove from Employees' Manual, Title 14, Chapter E, page 31, dated March 30, 2004, and destroy it.

Additional Information

Refer questions about this general letter to your area income maintenance supervisor 2.



STATE OF IOWA

THOMAS J. VILSACK, GOVERNOR
SALLY J. PEDERSON, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
KEVIN W. CONCANNON, DIRECTOR

April 21, 2006

GENERAL LETTER NO. 14-E-14

ISSUED BY: Office of Policy Analysis

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*, pages 47 through 51, revised.

Summary

This chapter is revised to update the section, "SDXD DISPLAY SCREENS," to match the current system versions of the screens and the function keys.

Effective Date

Immediately.

Material Superseded

Remove the following pages from Employees' Manual, Title 14, Chapter E, and destroy them:

<u>Page</u>	<u>Date</u>
47, 48	November 5, 1996
49	May 1, 2001
50, 51	November 5, 1996

Additional Information

Refer questions about this general letter to your area income maintenance administrator.



October 6, 2006

GENERAL LETTER NO. 14-E-15

ISSUED BY: Office of Policy Analysis

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*, pages 43 and 47 through 51, revised.

Summary

This chapter is revised to:

- ◆ Add new codes, "A" and "Q," and descriptions and change the description of code "G" in the section, "SDX DATA: Special SSI/Disabled Child/Widow/Widower." These codes are used to inform the Department of the effect of SSI determination on Medicaid and how to apply Medicaid policies to the persons that SSI states are Medicaid-eligible.
- ◆ Add language on another way to access the SDXD screens in the section, "SDXD DISPLAY SCREENS." Access to SDXD can now be done using the person's TD03 or BCW2 screens and entering 3 SDXD in the CD/SCRN position in ABC.
- ◆ Add a new function key, PF7=TD03, to the SDXD screens. If you accessed the SDXD screen from a person's TD03 or BCW2 screen in ABC by using the function key, you will be returned to the TD03 screen in ABC.

Effective Date

Immediately.

Material Superseded

Remove the following pages from Employees' Manual, Title 14, Chapter E, and destroy them:

<u>Page</u>	<u>Date</u>
43	September 12, 2000
47-51	April 21, 2006

Additional Information

Refer questions about this general letter to your area income maintenance administrator.



STATE OF IOWA

CHESTER J. CULVER, GOVERNOR
PATTY JUDGE, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
KEVIN W. CONCANNON, DIRECTOR

February 1, 2008

GENERAL LETTER NO. 14-E-16

ISSUED BY: Bureau of Policy Analysis and Appeals

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI STATE DATA EXCHANGE*, pages 2a through 2d, 3, and 4, revised.

Summary

This chapter is revised to:

- ◆ Change the name of forms 470-2304 and 470-0364 from *Medicaid Information Questionnaire for SSI Persons* to *SSI Medicaid Information*, for simplification. Also the form references reflect the system-generated versions and Spanish versions of the form.
- ◆ Clarify language under the section, "Worker Action Required: Automated SDX Process for New SSI-Related Medicaid Cases."

Effective Date

Immediately

Material Superseded

Remove the following pages from Employees' Manual, Title 14, Chapter E, and destroy them:

<u>Page</u>	<u>Date</u>
2a-2d	March 30, 2004
3	September 12, 2000
4	March 30, 2004

Additional Information

Refer questions about this general letter to your area income maintenance administrator.



STATE OF IOWA

CHESTER J. CULVER, GOVERNOR
PATTY JUDGE, LT. GOVERNOR

DEPARTMENT OF HUMAN SERVICES
CHARLES J. KROGMEIER, DIRECTOR

September 17, 2010

GENERAL LETTER NO. 14-E-17

ISSUED BY: Bureau of Financial, Health and Work Supports,
Division of Adult, Children and Family Services

SUBJECT: Employees' Manual, Title 14, Chapter E, *SSI DATA EXCHANGE*, pages 2a, 3,
4, 16, and 26, revised.

Summary

Chapter 14-E is revised to clarify policy on reviewing the payment status code when SSI is terminated, to determine how to proceed for benefit eligibility.

Effective Date

Immediately.

Material Superseded

This material replaces the following pages from Employees' Manual, Title 14, Chapter E:

<u>Page</u>	<u>Date</u>
2a, 3, 4	February 1, 2008
16	November 5, 1996
26	May 1, 2001

Additional Information

Refer questions about this general letter to your area income maintenance administrator.

October 22, 2021

GENERAL LETTER NO. 14-E-18

ISSUED BY: Iowa Medicaid Enterprise

SUBJECT: Employees' Manual, Title 14, Chapter E, **SSI State Data Exchange**, Title Page, Contents Page 1, page 1 and 2, revised; 2a, 2b-2d, removed; 3 and 4, revised; 4a, removed; 5 and 6, 7-9, 10, 11, 12, 13, 14, 15, 16, 17-22, 23, 24, 25, 26, revised; 26a, removed; 27, 28, 29 and 30, 31, 32 and 33, 34 and 35, 36, 37 and 38, 39, 40-42, revised; 43, 44-46, 47-51, removed.

Summary

This chapter is revised to bring language, forms, and procedures up to date and to update style and formatting throughout.

Effective Date

Immediately.

Material Superseded

<u>Page</u>	<u>Date</u>
Title Page	November 5, 1996
Contents Page 1	March 30, 2004
1	March 30, 2004
2	May 1, 2001
2a	September 17, 2010
2b-2d	February 1, 2008
3 and 4	September 17, 2010
4a	March 20, 2001
5 and 6	September 12, 2000
7-9	November 5, 1996
10	March 30, 2004
11	November 5, 1996
12	March 30, 2004
13	November 5, 1996
14	November 5, 1996
15	March 30, 2004
16	September 17, 2010
17-22	May 1, 2001
23	March 30, 2004
24	May 1, 2001
25	March 30, 2004

26	September 17, 2010
26a	May 1, 2001
27	May 1, 2001
28	November 5, 1996
29 and 30	March 30, 2004
31	March 11, 2005
32 and 33	November 5, 1996
34 and 35	May 29, 2001
36	March 30, 2004
37 and 38	November 5, 1996
39	September 12, 2000
40-42	November 5, 1996
43	October 6, 2006
44-46	November 5, 1996
47-51	October 6, 2006

Additional Information

Refer questions about this general letter to your area income maintenance administrator.

September 29, 2023

GENERAL LETTER NO. 14-E-19

ISSUED BY: Bureau of Financial, Food, and Work Supports
Division of Adult, Children, and Family Services

SUBJECT: Employees' Manual, Title 14, Chapter E, **SSI State Data Exchange**, Title Page, Contents I, I-35, revised; 36-42, removed.

Summary

This chapter is revised to clarify SDX Change Summary and SDX Treasury information for SNAP

Effective Date

Upon receipt.

Material Superseded

Remove the following pages from Employees' Manual, Title 14, Chapter E, and destroy them:

<u>Page</u>	<u>Date</u>
Title Page	October 22, 2021
Contents I	October 22, 2021
I-42	October 22, 2021

Additional Information

Refer questions about this general letter to your area income maintenance administrator.