

## 8. Disability Insurance and Veterans Benefits



### 8.1 Anticipating DIB

DI benefits are sometimes paid as retroactive benefits and sometimes as a regular weekly or biweekly amount depending on the statement of the doctor in the medical verification and the date the statement is received. This dependence on the doctor's statement makes anticipation of DI very difficult. It sometimes takes a number of weeks for the first payment to be processed. EWs must take this into account when anticipating DI.



### 8.2 DI Benefit Schedule

[Refer to Chart Book, [“DIB Weekly Benefit Amount,”](#) page 7-18.]



### 8.3 Verifying DI

#### 8.3.1 IEVS Applicant - DI Data Report

CalWIN's IEVS Applicant DI Data report can be used to verify the status of an existing Disability Insurance Benefits (DIB) claim for CalWORKs, RCA, CalFresh and Medi-Cal. [Refer to [“IEVS as a Verification,”](#) page 3-6].

**Reminder:**

A “potential” claim cannot be determined for DIB, as a medical report is necessary to establish disability.

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The IEVS Applicant DI Data report provides the following information:

- Reported by EDD date
- Claim Begin Date
- Field Office
- Maximum Benefits
- Weekly Benefits
- Remaining Benefits
- Issuance Information including:
  - Issued Date
  - Cleared Date
  - Check #
  - Check Amount
  - Check Ending Date
  - Reduction Amount
  - Reduction Details

[Refer to “Search for IEVS Applicant Reports” in the “Interface” subsystem in the OLUM for instructions on how to access EDD Data reports.]

### 8.3.2 EDD Real-Time Match

The real time EDD match is accessed through MEDS. [\[Refer to “EDD Real-Time Match,” page 4-17](#) for access information.] IEVS includes an on-line EDD real-time match screen which can be used to determine if an applicant/ recipient has an existing Disability Insurance Benefits (DIB) claim. A “potential” claim cannot be determined for DIB, as a medical report is necessary to establish disability.

The CalWIN IEVS-PVS reports are to be used to verify the applicant’s current DIB status, whenever possible. The Real-Time Match may be used when the EW is authorizing benefits prior to the receipt of the IEVS-PVS report.

**Note:**

The on-line data is only retained for 61 days. When using the EDD real-time match information for verification purposes, print the screen and have it scanned into the IDM system.

### 8.3.3 IEVS PVS-DI Data Report

The CalWIN IEVS PVS-DI Data report verifies DI payments monthly for all recipients of CalWORKs, RCA, CalFresh and Medi-Cal. [\[Refer to “IEVS as a Verification,” page 3-6\]](#).

The IEVS PVS-DI Data report provides the following information:

- Weekly Benefit Amount
- Maximum Benefit Amount
- Remaining Benefit Amount
- Claim Begin Date
- Field Office
- Issuance Information including:
  - Issued Date
  - Cleared Date
  - Check #
  - Check Amount
  - Reduction Amount
  - Reduction Details

### **Response Document**

Regulations require that the state be notified when information received from IEVS-PVS abstract/report causes a:

- Discontinuance
- Change in benefits
- Change in share of cost.

There is a [Response Document] button on the **View IEVS - PVS Report** window which when clicked brings up the **Create IEVS Response Document** window. The worker must enter the necessary information on this window and save which causes the data to be sent through an interface to the state. [Refer to “Search for IEVS Recipient Reports” in the “Interface” subsystem in the OLUM for instructions on how to access PVS reports.]

### **8.3.4 DI Abstract**

The DI Abstract contains payment information for current and prior years. The abstract is used to request DIB information if the information is NOT available on the IEVS EDD Data reports.

To request a DI Abstract, the requestor must complete the DE 8720 following the directions on the back of the form.

**Note:**

UI Abstracts and Wage Claim Abstracts cannot be requested on the same DE 8720 with requests for DI Abstracts.

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## Interpreting the DI Abstract

- REQUESTOR:** The requestor (“W”) code supplied by the county on the DE 8720.
- DIB 100:** Form Number
- DATE:** This is the date the DI Abstract was printed. Automated DI payment history files will be updated weekly on Fridays, and DI Abstracts will be printed the same day. The most recent payment information on the DI Abstract will be seven to ten days old when printed.
- SSA:** The recipient's Social Security Number.
- NAME:** The recipient's first and middle initial and up to 12 letters of his/her last name will be provided.
- CHK-DATE:** The DI check is printed and, in most cases, mailed by the field office on this date. It is the best guideline of information to estimate the date that the recipient would have received the check.
- OFFICE:** This is the number of the EDD field office where the DI claim was filed.
- CHK NO.:** Form GEN 973 is used to request UI and DI check photocopies. A copy of the DI Abstract to document the check number must be attached.
- AMOUNT:** The DI Abstract shows the amount of each payment recorded on DI payment history files.
- LIAB.:** The liability code indicates the disabled account to which DI payments are to be charged. Liability is based on employment status as of the date the disability began. Liability codes commonly used are:
- Code “0” or “8” - On the date disability began, the person had not been terminated from his/her employment.
  - Code “4” - Former inmate account. For EDD use only.
  - Code “7” - On the date disability began, the individual was not employed.
  - Code “00” - Employment status has not been determined.



## 8.4 Veterans Benefits

A veteran is defined as an individual who has been a member of a military, naval or air service during wartime; or died while in the military; or has a service connected disability; and has been discharged or separated from active duty.

An individual is not eligible for Veterans' Benefits if he/she is currently on active duty.

### 8.4.1 County Veterans Service Office (CVSO)

The County Veterans Service Office (CVSO) provides information and assistance for filing with the Veterans Administration claims for compensation, hospitalization, pensions, and other benefits which may be available to applicants or recipients for public assistance.

### 8.4.2 Referrals

Referrals on Medi-Cal only cases must be made using the "Military Verification and Referral Form" (MC 05). Cash aid program referrals must be made using the "Veterans Benefits Verification and Referral" form (CW 5).

When completing the MC 05 or the CW 5, the following information **MUST**, at a minimum, be provided:

- Social Services case number AND Aid Code,
- Veteran's name (first and last),
- Veteran's Social Security Number,
- Branch of Service the Veteran served under (dates of service are not required).

CVSO has requested that all referrals be e-mailed to their office. Their email address is: [vets@vets.sccgov.org](mailto:vets@vets.sccgov.org).

### 8.4.3 Veteran's Dependents

The following persons are considered to be a veteran's dependents:

- The spouse of the veteran if:
  - Currently married or separated but not divorced.

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- Divorced but not remarried.
- Legally married at the time of veteran's death.
- Divorced from veteran and any subsequent marriage(s) were terminated prior to the veteran's death.
- The parents of the veteran.
- Any natural or legally adopted child(ren) or stepchild(ren).

### 8.4.4 Required Referrals

In the following situations the EW must e-mail the MC 05 or the CW 5 to the CVSO:

- At Intake, if the client indicates a connection with the military or potential veteran's benefits.
- At redetermination, if the client reports new information or a change in status which indicates possible eligibility for veteran's benefits.
- Any other time that additional information indicates possible veterans benefits.

### 8.4.5 Referral NOT Required

A referral is not appropriate in the following circumstances:

- The person is on active duty in the Armed Forces, or if his/her only service was in the Merchant Marine or National Guard.
- The divorced spouse does not have the veteran's legal dependent in his/her custody.
- The Social Security Number and date of birth, Serial Number or Veterans Administration Claim Number is not available.
- There is no legal relationship between the claimant and the veteran, and it has been determined that paternity cannot be established.

#### Note:

California is not a "common-law" state. An alleged wife must produce a marriage certificate to support her claim. An alleged widow who does not have a marriage certificate must provide evidence that a marriage was established in a "common-law" state.

An illegitimate child can be recognized as a dependent or surviving child of a veteran only if the veteran acknowledged paternity in writing or if paternity was

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established by a court order. In the case of a deceased veteran, paternity can be established by secondary evidence. A referral to CVSO for assistance in developing secondary evidence should be completed.

- The Veteran's Information (Section 1) of the MC 05 or CW 5 cannot be completed.

**8.4.6 EW Responsibility**

The EW must take the following steps:

STEP	ACTION
1.	Review with the client the question on the SAWS 2 Plus that indicates a military connection or potential veteran's benefits.
2.	Advise the applicant/recipient that exploration of potential income sources is a condition of eligibility.
3.	Complete the MC 05 or CW 5 referral. Specific instructions for completing the referrals are on the back of the form (disregard the "Distribution and Filing of the CW 5" portion of the instructions).
4.	Scan a copy of the MC 05 or CW 5 for e-mailing and also save to IDM.
5.	E-mail the completed MC 05 or CW 5 directly to the CVSO at <a href="mailto:vets@vets.sccgov.org">vets@vets.sccgov.org</a> and include "MC 05" or "CW 5 " in the "Subject" line.
6.	When a referral is deemed inappropriate, document the reason on the <b>Maintain Case Comments</b> window in CalWIN and scan the MC 05 or CW 5 into IDM.
7.	Tickler the case for a 30-day follow-up. If a response has not been received from the CVSO, call CVSO at (408) 553-6000 to request the status of the referral.

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STEP	ACTION						
8.	Take appropriate action when the MC 05 or CW 5 is returned by the CVSO and have the MC 05 or CW 5 scanned into IDM.						
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9.	Repeat step 8 as often as necessary until a decision has been received.						
10.	Once the decision on the claim has been received and verified by viewing the completed MC 05 or CW 5 document on the <b>Maintain Case Comment</b> window of CalWIN and take appropriate action.						