

☐ CalSAWS DD&I☒ C-IV M&O☐ CalWIN M&O☐ LRS M&E

<b>Distribution Date:</b>	September 15, 2021
<b>To:</b>	Committee.MediCal_CMSP.All; Consortium.RegionalManagers.All; PPOC.Alpine; PPOC.Amador; PPOC.Butte; PPOC.Calaveras; PPOC.Colusa; PPOC.Del Norte; PPOC.El Dorado; PPOC.Glenn; PPOC.Humboldt; PPOC.Imperial; PPOC.Inyo; PPOC.Kern; PPOC.Kings; PPOC.Lake; PPOC.Lassen; PPOC.Local; PPOC.Madera; PPOC.Marin; PPOC.Mariposa; PPOC.Mendocino; PPOC.Merced; PPOC.Modoc; PPOC.Mono; PPOC.Monterey; PPOC.Napa; PPOC.Nevada; PPOC.Plumas; PPOC.Riverside; PPOC.San Benito; PPOC.San Bernardino; PPOC.San Joaquin; PPOC.Shasta; PPOC.Sierra; PPOC.Siskiyou; PPOC.Stanislaus; PPOC.Sutter; PPOC.Tehama; PPOC.Trinity; PPOC.Tuolumne; PPOC.Yuba;
<b>CIT Name:</b>	<b>CIV-109184 - Purged Medi-Cal (MC) Cases with a Linked Unsolicited DER (U-DER)</b>
<b>From:</b>	CalSAWS Project

**PPOCs, please forward to the appropriate impacted staff in your county:**

- |   |   |
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| <input type="checkbox"/> General<br><input type="checkbox"/> Policy<br><input type="checkbox"/> CW<br><input type="checkbox"/> CF<br><input checked="" type="checkbox"/> MC<br><input type="checkbox"/> CMSP<br><input type="checkbox"/> FC/KG/AAP<br><input type="checkbox"/> Child Care<br><input type="checkbox"/> WtW<br><input type="checkbox"/> Other Program(s) _____<br><input type="checkbox"/> C4Yourself <input type="checkbox"/> Your Benefits Now!<br><input type="checkbox"/> Customer Correspondence<br><input type="checkbox"/> Other _____ | <input type="checkbox"/> Reports<br><input type="checkbox"/> Fiscal<br><input type="checkbox"/> Caseload Movement<br><input type="checkbox"/> Management<br><input type="checkbox"/> Fiscal<br><input type="checkbox"/> Security<br><input checked="" type="checkbox"/> Batch and Interfaces<br><input type="checkbox"/> Imaging<br><input type="checkbox"/> Migration<br><input type="checkbox"/> Conversion<br><input type="checkbox"/> Technical<br><input type="checkbox"/> Training<br><input checked="" type="checkbox"/> Help Desk |
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<b>Description:</b>	<p><b>Purpose</b> The purpose of this CIT is to provide the 39 C-IV Counties with additional information regarding data purged cases containing a Medi-Cal (MC) program that is linked to a California Healthcare Eligibility, Enrollment and Retention System (CalHEERS) case.</p> <p><b>Background</b> CalSAWS Information Transmittals (CIT) No. 0091-21, 0107-21 and 0172-21 informed counties about the CalSAWS Data Retention Policy to remove specific aged data from the C-IV system prior to migration into CalSAWS.</p>
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Counties were given the following instructions:

Cases going through the process will have a Data Removal Status of DO NOT ACTION, CASE IN PROCESS on the Case Summary and Case Data Removal Detail page.

1. *DO NOT Repend or Reapply* a person to a program on a Case that has a Data Removal Status of "DO NOT ACTION, CASE IN PROCESS" or "Complete". These actions will cause data loss of the new information.
2. If a reapplication is needed, create a new case, and link it to the previous case number using the companion case process.

C-IV Case purge logic removed the Medi-Cal programs from closed cases, but the CalHEERS-related information remained. Since the CalHEERS case remains linked, any Unsolicited – Determination of Eligibility Responses (DER-Us) generated by CalHEERS will be sent to the purged case as a Determination Change. These DER-Us cannot be processed using the purged cases as that action will cause data loss of the new information.

SCR CIV-109184 - Remove CalHEERS Case Linkage for Purged cases was created to address issues related to the CalHEERS linked purged cases. This SCR went into production on 8/27/2021 and updated the system with the following recommendations:

1. Updated 'Determination Change' DER-Us received from CalHEERS on purged C-IV cases to be a Referral and have no linkage to the C-IV case. This system change will allow workers to link the Referral to a new SAWS Case and/or cancel the DER if appropriate.
2. Removed the CalHEERS linkage from the purged C-IV cases as long as there was no Pending or Active Medi-Cal program.  
Note: A Data Change was coordinated with CalHEERS to also unlink the C-IV purged cases from the CalHEERS cases.

Two separate lists were created as follows:

1. Purged CIV cases with an Active or Pending MC Program
2. DER-Us Unlinked from Purged CIV Cases (as described in Recommendation 1 above)

The lists are located on the CalSAWS Web Portal as follows:



#### **Additional Information**

SCR CIV-109097 – Update DER status to 'Suppressed' for DERs on purged C-IV cases - Data Change Run Date: 07/15/2021 A Data Change updated the Status of all DERs on a purged case received prior to the case removal start date to have a Status of Suppressed so they will not be used in EDBC in the event the purged case is re-opened, and a new Medi-Cal program is created.

**Note:** CalHEERS does not currently allow SAWS to associate a new SAWS case number to an existing CalHEERS case. This issue is a temporary one as in 22.02, CalHEERS and CalSAWS will have functionality in the system for users to specify the new SAWS/CH case linkage. The CalSAWS data removal effort has been postponed until after 22.02 when this new CalHEERS case linkage updates are in production.

**County Action**

The following actions should be completed for C-IV cases on **List 1 - Purged CIV cases with an Active or Pending Medi-Cal program:**

Step	Action
1	Close the purged C-IV case/program using a Negative Action of 'Worker Initiated-Skip CalHEERS' Note: Do not request a negative action from CalHEERS.
2	Open a new C-IV case. Note: The DER-U information can be utilized to create the new C-IV case.
3	Send an EDR to CalHEERS. Note: This will create a new CalHEERS case for ongoing eligibility in CalHEERS.
4	Process case per county business process.
5	Submit a ticket to the CalHEERS Help Desk to close the CalHEERS case linked to the purged C-IV case. Note: Step 5 must be completed after Step 4.

The following actions should be completed for C-IV cases on **List 2 - DER-Us Unlinked from Purged Cases:**

The cases on this list were originally received as a Determination Change on a purged case. A worker may not have been aware of the receipt of the DER-U. The cases on this list are now a 'Referral' and should be processed according to the county's business process. The Referral should be linked to a **new** SAWS case or the DER cancelled, whichever is appropriate. **DO NOT** link the Referral to the existing purged case.

There is no system requirement to complete the cases on these lists prior to conversion to CalSAWS. The steps will be the same when they convert to CalSAWS. If lists are processed post-conversion, substitute C-IV with CalSAWS in the steps above.

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Attachments

None

Web Portal  
Link:



OR

You may also retrieve the CIT document and attachments by following these steps:

1. Click on the CRFIs & CITs link at the top of the page.
2. Click on the "CalSAWS Information Transmittal (CIT)" folder.
3. Click on the "2021" folder.
4. Click on the appropriate CIT # folder.

