

## **Medi-Cal CalHEERS Case Linkage**

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### **Purpose**

The purpose of this job aid is to provide information for the functionality of the Search Interface from CalSAWS into CalHEERS.

### **Case Linkage Functionality**

CalSAWS has the functionality to search for MAGI cases, applications, and person information known to CalHEERS, and if found, that information will be returned to CalSAWS.

Additionally, CalHEERS will allow CalSAWS to update the CalSAWS-MAGI case linkage with a 'Case Linkage Override' in an EDR. CalHEERS has functionality to accept updated CalSAWS-CalHEERS person associations in an EDR, and CalHEERS also adds functionality for CalSAWS to cancel a DER-U and change the County of Responsibility (COR) if received by an incorrect county, and CalHEERS will update the COR for the MAGI case, and then trigger a DER-U to the correct county.

### **CalHEERS-SAWS Search Interface**

A real-time CalHEERS-SAWS Search and Response transaction sends and receives information between the two systems. The Search Response transaction is returned in view only mode. If the Search response transaction is performed inside the context of a case the information may be used to perform a Case Linkage update. The results on this page will either have details or could return an error message from CalHEERS.

CalHEERS will keep the CalHEERS-SAWS Search Request/Response transaction open for 30 seconds. If CalHEERS has not provided a response after 35 seconds, CalSAWS will stop waiting for CalHEERS and display the error message "Your Search request has timed out". The returned information from the CalHEERS-SAWS search will remain available to users until one of the follow actions occur:

- The User sends an EDR,
- The User cancels the MAGI Case Linkage update request,
- The User performs a new MAGI Search,
- After 10 minutes of not actively working on the MAGI Case Linkage update, or,

- The User logs out of CalSAWS.

## System Page Changes

**MAGI Case Search** page allows a user to search and view MAGI case, application, and person level information known to CalHEERS from CalSAWS. This page may be accessed from within the context of a case or loaded outside the context of a case. Search parameters drop list on this page includes Search by MAGI Case number, MAGI Application number, person information, or SAWS Case number and SAWS county name.

The CalHEERS responses on this page could be a CalHEERS error response, the fact that your Search Request has timed out, or you will receive the information requested. The hyperlink of the SAWS Case Number navigates to the Case Summary page for the known CalSAWS case numbers, and MAGI Case Number hyperlink on this page navigates to the MAGI Search Response Case Detail page.

**MAGI Search Response Case Detail** page displays the MAGI case-level and summary person-level information provided by the CalHEERS-SAWS Search transaction. This page may be accessed from outside the context of a case which is a view only mode, or from within the context of a case which displays in the Edit Mode and contains a "Link to Case" button. This page displays the MAGI Case Member information, including Names/age, Date of Birth (DOB), Social Security Number (SSN) and Client Index Number (CIN).

PAGE Validations:

A validation message to prevent a user from linking the CalSAWS case to a different MAGI case, if the CalSAWS case has ongoing MAGI Medi-Cal eligibility, and the new MAGI case is closed. The validation message:

**"Close** – Unable to Request Case Linkage Update to the selected MAGI case because the CalSAWS case has ongoing MAGI Medi-Cal and the selected MAGI case is closed."

This is a hard validation and prevents the linking update.

A validation message to prevent a user from linking the CalSAWS case to a MAGI case if the CalSAWS case has a pending or ongoing MAGI Medi-Cal eligibility, and the new County of Responsibility (COR) is different, and the MAGI case has any individuals with a Pending, Conditionally Eligible, or Eligible MAGI Medi-Cal eligibility. The validation message:

**“Close** – Unable to Request Case Linkage Update to the selected MAGI case because the CalSAWS case has pending or ongoing Medi-Cal eligibility and the selected MAGI case is in a different county with pending, conditionally eligible, or active MAGI beneficiaries.”

This is a hard validation and prevents the linking update.

A validation message to prevent a user from linking the CalSAWS case to the selected MAGI case if the selected MAGI case has more individuals with pending, conditionally eligible, or eligible MAGI eligibility, than in the CalSAWS case. The validation message:

**“Close** – Unable to Request Case Linkage Update to the selected MAGI case because the MAGI case has more pending, conditionally eligible or eligible MAGI Medi-Cal individuals than in the CalSAWS case household.”

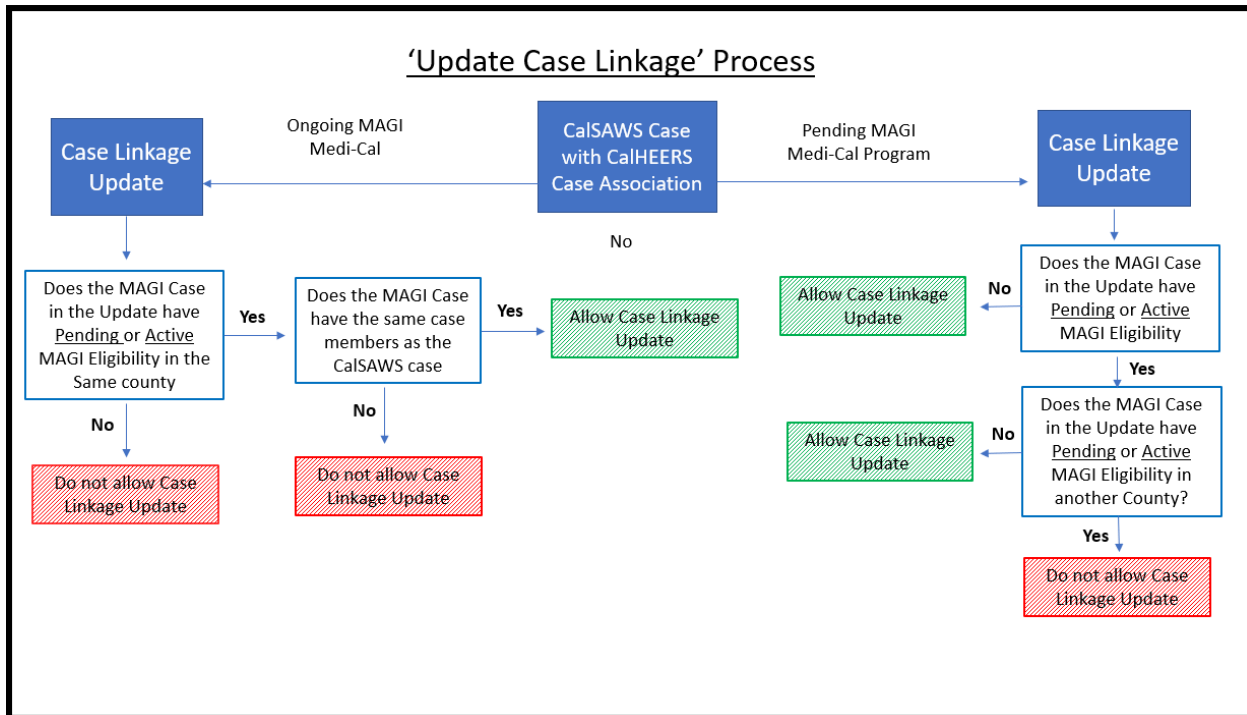
This is a hard validation and prevents the linking update.

There is a warning message that displays when the page loads and the MAGI case in the MAGI Search Response has pending, conditionally eligible or ineligible MAGI Medi-Cal eligibility in the same county as the CalSAWS case. The warning message:

“The MAGI case has at least one individual pending, conditionally eligible or eligible on MAGI Medi-Cal in the same county as the CalSAWS case.

The user is still able to select the ‘Link to Case’ button.

The following is a chart of the “Update Case Linkage” Process flow:



**MAGI Search Response Person Detail** page allows a user to view person-level information provided in the search response from the CalHEERS-SAWS Search Transaction. This page displays information in view mode.

**MAGI Determination List** page is updated to display the 'Request Case Linkage Update' field, along with the selected new MAGI Case number. This Request Case Linkage Update will remain on the MAGI Determination List page until the user sends an EDR, cancel the Request Case Linkage Update, navigates away from the page, and performs a new MAGI Case Search, the user's session times out, or the user logs off the system.

When this page is navigated to from the 'MAGI Search Response Case Detail' page and the 'Request Case Linkage Update' field is populated: the Begin Month and End month to the come-up month and display as read only. The following fields are hidden - Bypass Primary Contact Matching Criteria, Request Lift Options, Request Negative Action determination, and Restart VLP e-Verification.

When the 'Cancel' button is clicked, the "MAGI Case Number" and "Cancel" button are hidden, and a new button named "Recover Case Linkage" is displayed.

When the 'Recover Case Linkage' button is used, the page reload removes the case linkage update, and displays the following fields: Begin and End dates as editable fields, Primary Contact Matching Criteria, Request Lift Options, Request Negative

Action determination and Restart VLP e-Verification. The use of this button will also hide the 'Recover Case Linkage' button and displays the MAGI Case number under the 'Request Case Linkage Update' field, along with the 'Cancel' button. If the 'Recover Case Linkage' button remains, and the user clicks the 'Request MAGI' button, the Case Linkage Update information from the session is removed, and the current MAGI case information is used in the EDR.

When the 'Request Cases Linkage Update' field is populated and the user clicks the 'Request MAGI' button, a Yes will populate on the 'Case Linkage Override Indicator' on the EDR for the Come-up month. It will also populate the new MAGI case number in the EDR and populates the CalHEERS Person number for the new MAGI case by either using the CalHEERS Person number from the latest 'reviewed' or 'completed' DER, or it will not populate a CalHEERS person number, but will leave the field blank.

**Note:** If a user wants to process prior benefit months, it can be done after the Case Linkage has been updated.

**MAGI Request Detail** page displays the 'Request Case Linkage Update' and shows the 'Confirm Associations' button when the user requests a case linkage update.

When the user clicks the 'Confirm Associations' button, the page navigates to the Person Association List page. This page now displays a 'Send All', 'Cancel', or 'View Associations' buttons.

When the Send All button is used, the CalHEERS-SAWS Search Response information is cleared. Once the DER transaction is received for the Case Linkage update, a mass update to link 'Referrals' or 'Determination Changes' that have no prior linkage and are in the same county in 'Received' or 'In Process' status for the same MAGI case number to the CalSAWS case.

When the Cancel button is clicked the Case Linkage update information will remain in the user's session.

**Person Association List** page allows a user to update the CalHEERS person number associated to the CalSAWS person only on the first EDR of an EDR companion set. The page also displays a 'Confirm' button when the user is updating the case linkage.

In the Persons Included in the Request section of the page there is a 'View Details' button that opens in Edit mode, for the first EDR. This button will display in view only mode for all companion EDRs. The information for the companion EDRs of the set will be copied from the first one.

**MAGI Referral Detail page** allows a user to cancel a MAGI Referral or Determination Change when it belongs to another county.

There is a Cancellation Reason 'Update County of Responsibility' in the drop list. When this reason is selected a drop list for 'County of Responsibility' will display to the right. All county names will display in full and user will select the correct County of Responsibility.

Additionally, a user can update the status of the Determination change to 'Canceled' when the DER meets the following criteria:

- a. The DER is linked to a CalSAWS case
- b. The type is Determination Change
- c. The CalSAWS case to which the DER is linked has no open Medi-Cal Programs

There is a page warning that displays when the Cancellation reason selected is either 'Application Opened in Error' or 'Duplicate Application'. Warning Message displays as:

**Warning:** Clicking the Save and Send button will Send a Cancellation request to CalHEERS. Once Saved, this Referral and the MAGI Case Number can no longer be used.

This warning will not stop the user from sending the CancelDER transaction.

There is a page warning when the user selects the Cancellation Reason of 'Update County of Responsibility'. Warning message displays as:

**Warning:** Clicking the Save and Send button will send a request to CalHEERS to update the County of Responsibility. Once Saved, this Referral can no longer be used.

This warning will not stop the user from sending the CancelDER transaction.