

## **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 CalHEERS-SAWS 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 by sending a 'Case Linkage Override' in an EDR. CalHEERS has functionality to accept updated CalSAWS-CalHEERS person associations in an EDR, and CalHEERS also has functionality for CalSAWS to cancel a Determination of Eligibility Response (DER-U) and change the County of Responsibility (COR) if received by an incorrect county, 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 outside the context of a case. The Search parameters drop list on this page include 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, if the CalSAWS case is in the same county as the logged in user and the MAGI Case Number hyperlink on this page navigates to the MAGI Search Response Case Detail page.

Page display with a Successful Search Response with 3 cases returned from Search:

MAGI Case Search			
* - Indicates required fields			
▶ Refine Your Search			
Search Results Summary			Results 1 - 3 of 3
MAGI Case Number	MAGI Case Status	SAWS Case Number	SAWS Case County
<a href="#">500000008</a>	Inactive	<a href="#">1B0H387</a>	San Bernardino
<a href="#">500000009</a>	Inactive	1C98H22	San Francisco
<a href="#">500000010</a>	Inactive	<a href="#">1B00YY2</a>	Los Angeles

When searching by Person Information the following page validations may display for information that does not meet the minimum search criteria:

Criteria: If more than one of CIN, SSN, ATIN, or ITIN are populated and none of First Name, Last Name, and DOB are populated

**Validation message:** Search By – Narrow search to only one of the following:  
CIN, SSN, ATIN, or ITIN.

**Criteria:** If either First Name, Last Name or DOB are populated, then First Name, Last Name and DOB are required.

**Validation message:** Search By – For search by name or DOB, First Name, last Name and DOB are required.

**Criteria:** If First Name, Last Name and DOB are populated and more than one of the CIN, SSN, ATIN, or ITIN, are populated

**Validation message:** Search By – Narrow search to Name, DOB, and either CIN, SSN, ATIN, or ITIN

**Criteria:** If all field values are blank.

**Validation message:** Search By – enter search criteria

**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).

MAGI Response Case Detail, from within the Context of the Case (Edit Mode)

MAGI Search Response Case Detail

Link to Case

Close

MAGI Case Number:

5000000009

MAGI Case Status:

Inactive

Initiated Date:

05/26/2021 1:13 PM

MAGI Application Number:

198000

MAGI Application Status:

Completed

County of Responsibility:

Riverside

Actively Linked SAWS Case Number:

Active SAWS Case County:

Last Associated SAWS Case Number:

1B0H387

Last Associated SAWS County:

San Bernardino

▼ MAGI Case Members

Name	DOB	SSN	CIN
<a href="#">Hardy, Tom 45</a>	01/22/1987	444-44-4444	39319735A
<a href="#">Hardy, Danielle 11</a>	06/01/2010	675-30-0702	31419735A

Link to Case

Close

Viewing the case from the Edit mode (within the context of the case) a button displays to Link to Case which links the CalHEERS case to the CalSAWS case.

**"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 CalSAWS Household is defined as any case person with a household status other than permanently out of the home. 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.

A validation message to prevent a user from linking the CalSAWS case to the selected MAGI case if the MAGI case is currently linked to a CalSAWS case.

**"Close** – Unable to Request Case Linkage Update to the selected MAGI case because the MAGI case is already linked to the CalSAWS case."

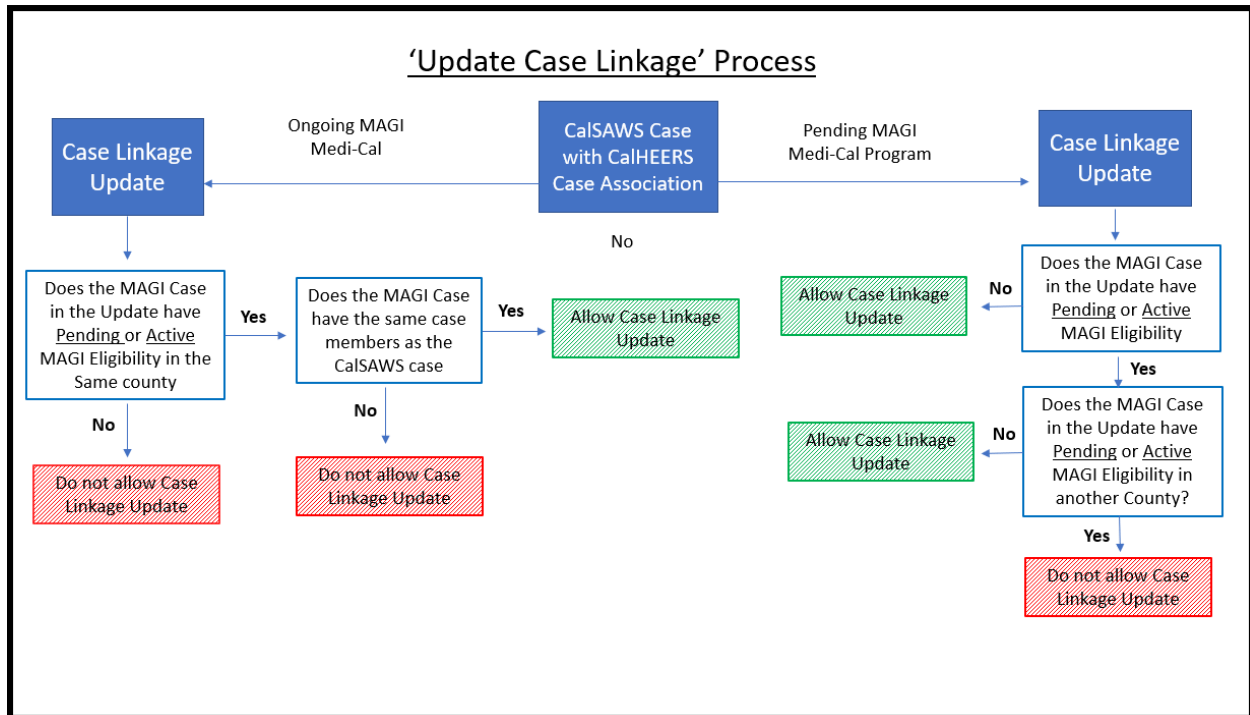
This is a hard validation and prevents the linking update.

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 COR 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

Close

Name

Last Name:

Hardy

First Name:

Tom

Primary Contact:

Yes

CalHEERS Admin Information

CalHEERS Person Number:

01

SAWS Person Number:

01

CalHEERS Account Created:

Yes

Active in CalHEERS:

Yes

Individual Demographics

Social Security Number:

564-79-6743

ATIN:

ITIN:

Date of Birth:

01/12/1990

CIN:

826535117

Medi-Cal Eligibility Information

MAGI Status:

Discontinued

Non-MAGI Status:

Ineligible

Covered California Eligibility Information

Active Enrollment:

No

APTC Status:

Ineligible

CSR Status:

Ineligible

QHP Status:

Ineligible

Title XXI (MCAP/CCHIP Status):

Ineligible

Close

When this page is navigated to from the 'MAGI Search Response Case Detail' page and the 'Request Case Linkage Update' field is populated with 'Yes': the Begin Month and End month are set to the come-up month and display as read only. The

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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" buttons are hidden, and a new button named "Recover Case Linkage" is displayed with 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.

MAGI Determination List page with Request Case Linkage Update:

**MAGI Determination List**

\*- Indicates required fields

**Request MAGI Determination**

<b>Begin Date: *</b> 09/2021	<b>End Date: *</b> 09/2021
<b>Program Identifier: *</b> Medi-Cal ▼	<b>Request Case Linkage Update:</b> 5000000009 <b>Cancel</b>
<b>Life Change Event:</b> ▼	

**Request MAGI**



MAGI Determination List page with Request Case Linkage Update:

**MAGI Determination List**

\*- Indicates required fields

**Request MAGI Determination**

Begin Month: \* 09/2021 ▼

End Month: \* 09/2021 ▼

Program Identifier: \* Medi-Cal ▼

Life Change Event: ▼

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

**Request Case Linkage Update:**

**Recover Case Linkage**

**Request MAGI**

When the 'Request Case 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, if the MAGI case is known to CalSAWS, otherwise, it will remain 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.

MAGI Request Detail page showing Request Case Linkage update field and Confirm Associations button:

**MAGI Request Detail**

Confirm Associations

Cancel

**MAGI Case Number:**  
5000000009

**MAGI Case Name:**  
Hardy

**Request ID:**  
10000004628

**Case Number:**  
[L300C70](#)

**Case Name:**  
Tom Hardy

**Request Case Linkage Update:**  
Yes

**Type:**

**Status:**  
Pending

**Run Reason:**  
Continuing

**Benefit Month:**  
08/01/2021

**Program:** \*  
Medi-Cal

**Application**

**Application Date:**  
04/06/2021

**Primary Applicant/Recipient:**  
Tom Hardy

**Application Source:**  
SAWS

**Life Change Event:**

**Life Change Event Date:**

**Requested Retro:**  
No

**Maintain Verifications:**  
5

**Consent for Verifications:**  
Yes

**R&R Agreed:**  
Yes

**Signed Status/Date:**  
Signed on 04/06/2021

**Case Members**

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
<a href="#">Tom Hardy</a>	01	02/04/1987	564-98-0705	39319735A	
<a href="#">Danielle Hardy</a>	02	06/01/2010	675-30-0702	31419735A	

## MAGI Request Detail

[Send All](#)[Cancel](#)**MAGI Case Number:**

5000000009

**MAGI Case Name:**

Hardy

**Request ID:**

10000004628

**Case Number:**[L300C70](#)**Case Name:**

Tom Hardy

**Request Case Linkage Update:**

Yes

**Type:****Status:**

Pending

**Run Reason:**

Continuing

**Benefit Month:**

08/01/2021

**Program: \***

Medi-Cal

### ▼ Application

**Application Date:**

04/06/2021

**Primary Applicant/Recipient:**

Tom Hardy

**Application Source:**

SAWS

**Life Change Event:****Life Change Event Date:****Requested Retro:**

No

**Maintain Verifications:**

5

**Consent for Verifications:**

Yes

**R&R Agreed:**

Yes

**Signed Status/Date:**

Signed on 04/06/2021

### ▼ Case Members

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
<a href="#">Tom Hardy</a>	01	02/04/1987	564-98-0705	39319735A	
<a href="#">Danielle Hardy</a>	02	06/01/2010	675-30-0702	31419735A	

[View Associations](#)

When the user clicks the 'Confirm Associations' button, the page navigates to the Person Association List page. Once the person Association List page is confirmed, and the user closes the page, the page re-loads with the 'Send All', 'Cancel', or 'View Associations' buttons. When the 'Send All' button is used, the EDR is sent to CalHEERS using the new MAGI case information, and the CalHEERS-SAWS Search Response information is cleared from the user's session. Once the DER transaction is received for the Case Linkage update, any Referrals or Determination Changes that have no prior linkage and are in the same county with a status of 'Received' or 'In Process' will be auto-linked 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.

Person Association List page

### Person Association List

Confirm

MAGI Case Number:  
5000000009

▼ Persons included in the Request

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN	
Hardy, Tom	01	Hardy, Tom	01	View Details
Hardy, Danielle	02	Hardy, Danielle	02	View Details

Confirm

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

MAGI Referral Detail page:

## MAGI Referral Detail

**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.**

Save and Send

Cancel

**MAGI Case Number:**

5000022351

**MAGI Case Name:**

Se

**Initiated Date:**

01/13/2022 3:26 PM

**Origination:**

Service Centre Representative,  
Service Centre Supervisor

**Determination ID:**

9602

**Case Number:**

**Case Name:**

Se

**Request ID:**

**Type:**

Referral

**Status: \***

Canceled

**Covered CA Change:**

No

**Cancellation Reason: \***

Update County of Responsibility ▼

**County of Responsibility: \***

- Select - ▼

**Run Reason:**

Continuing

**Benefit Month:**

08/01/2021

**Program:**

### Description of the Three Options

Application Opened in Error

Duplicate Application

Update County of Responsibility

When 'Update County of Responsibility' is selected a drop list for 'County of Responsibility' will display to the right and is a mandatory field to be completed. The names of all counties display in full and user will select the correct County of Responsibility.

A user can update the status of a Determination Change to 'Canceled' when the DER meets the following criteria:

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

The CalSAWS case to which the DER is linked has no open Medi-Cal Program.  
The Cancellation Reason is Update COR.

NOTE: The drop list options for Cancellation Reasons of 'Application opened in Error' and 'Duplicate Application' will not display.

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.