



Full Case Review

Priority Level: 3

Programs Impacted: Medi-Cal

Background:

During the conversion cutover from CalWIN to CalSAWS, the system will run a Batch EDBC job for all active CalWIN cases. If the CalSAWS Batch EDBC results match the last saved CalWIN EDBC result, the system considers the benefits a match and saves EDBC. If the CalSAWS Batch EDBC does not match the existing saved CalWIN EDBC, the case will be flagged with a Yellow Banner and the *Batch EDBC is not saved*. CalWIN Benefits will roll forward until the next EDBC is run in CalSAWS.

EDBC run in CalSAWS is resulting in an uncategorized mismatch reason. Users may need to review the case programs, verify/edit data collection information, recoupments, roles, benefit amount, aid codes, etc., and then run EDBC in CalSAWS before authorizing the results.

These cases will be identified in the **Conversion EDBC Case Review Report** as follows:

COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY
00	Sample	03	1305 Sample	00LS031G02	1S3GN54	Medi-Cal	Full Case Review	XX/XX/XXXX		3

Note: For these types of cases there will be no **PGM_STAT_RSN_Code** listed.

Note: The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most commonly impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all of the information is entered as accurately as possible to allow for a correct determination to be made.

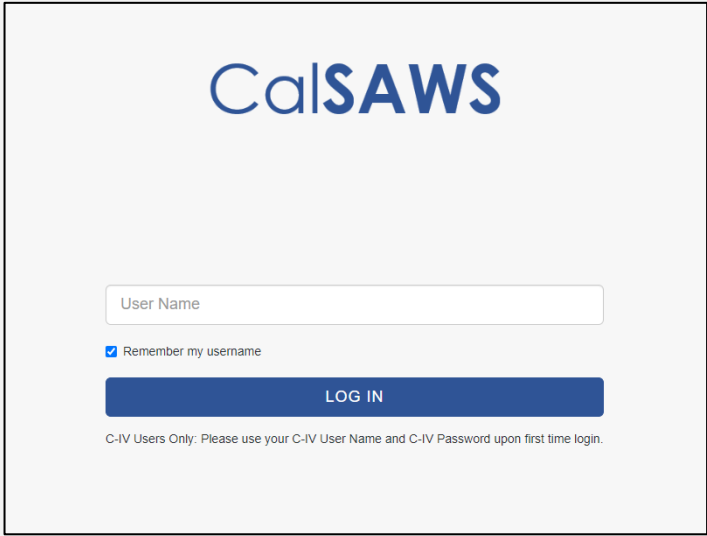



Example:

Worker will need to conduct a full case review for this Medi-Cal Program case with a Yellow Banner. The CalSAWS user will need to review the CalHEERs Referral (IAT Summary) and compare it to the CalSAWS Eligibility Determination Budget Calculation (EDBC) results converted over from CalWIN.

If the eligibly determination matches both in the CalHEERs Referral and the EDBC Results converted from CalWIN, the CalSAWS user can proceed to run EBDC. This action will confirm the eligibility of the individual(s) and remove the Yellow Banner. (Steps 1 – 17)

If the eligibility determination in the CalHEERs Referral does not match the EDBC results, the CalSAWS user will proceed to conduct a Full Case Review and update necessary data collection pages (i.e., Income, Tax Household, etc.). Once the necessary updates are made within the CalSAWS system, the CalSAWS user can proceed to run EDBC. This action will confirm the eligibility of the individual(s) and remove the Yellow Banner.

Steps to Clear Alert		Screenshot
1	Log in to CalSAWS by entering your Username and Password	
2	<div>On the Homepage:</div> <div>1. Enter the case number and click on the submit button to be directed to the Case Summary page.</div> <div>★ Note - this step is not necessary if already in the Case Summary page for the desired case</div>	



Steps to Clear Alert		Screenshot
3	<div>On the Case Summary Page: 1. Click on the IAT Summary link on the Task Navigator. This navigates the user to the Inter-Agency Transfer Summary page.</div>	



Steps to Clear Alert

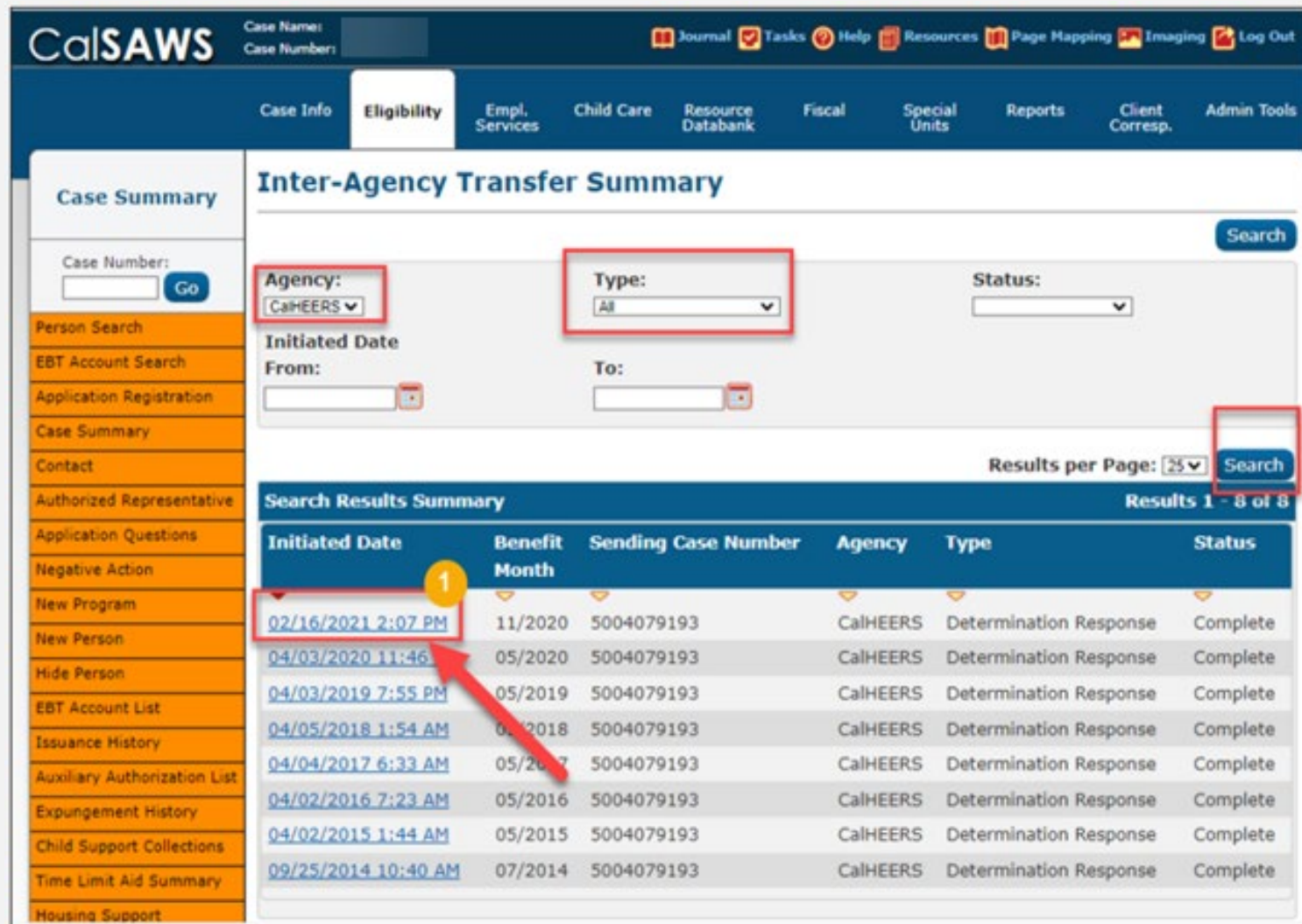
Screenshot

4 Once directed to the **Inter-Agency Transfer Summary**, the page should display the most recent transfers associated to this case.

Note: A manual search can be conducted by filling in the search criteria listed on the screen.

- Agency: CalHEERS
- Type
- Status
- Initiated Dated (From, To)

1. Click on the most recent Determination Response, to view the determination responses, click on the **Initiated Date hyperlink**. This will lead you to the **MAGI Referral Detail** page.



CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Case Summary

Case Number: Go

Person Search EBT Account Search Application Registration Case Summary Contact Authorized Representative Application Questions Negative Action New Program New Person Hide Person EBT Account List Issuance History Auxiliary Authorization List Expungement History Child Support Collections Time Limit Aid Summary Housing Support

Inter-Agency Transfer Summary

Agency: CalHEERS Type: All Status: Search

Initiated Date From: To: Search

Results per Page: 25 Search

Search Results Summary Results 1 - 8 of 8

Initiated Date	Benefit Month	Sending Case Number	Agency	Type	Status
02/16/2021 2:07 PM	11/2020	5004079193	CalHEERS	Determination Response	Complete
04/03/2020 11:46	05/2020	5004079193	CalHEERS	Determination Response	Complete
04/03/2019 7:55 PM	05/2019	5004079193	CalHEERS	Determination Response	Complete
04/05/2018 1:54 AM	05/2018	5004079193	CalHEERS	Determination Response	Complete
04/04/2017 6:33 AM	05/2017	5004079193	CalHEERS	Determination Response	Complete
04/02/2016 7:23 AM	05/2016	5004079193	CalHEERS	Determination Response	Complete
04/02/2015 1:44 AM	05/2015	5004079193	CalHEERS	Determination Response	Complete
09/25/2014 10:40 AM	07/2014	5004079193	CalHEERS	Determination Response	Complete



Steps to Clear Alert

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The **MAGI Referral Detail** page will display the following information sent from CalHEERs to CalSAWS:

- MAGI Case Information
- Application Information
- Case Member Details
- MAGI Eligibility Determination
- APTC/CSR Eligibility Determination
- Requested Programs Detail
- Authorized Representative Detail
- Comments
- Worker Information
- Status History

Screenshot

The screenshot displays the CalSAWS MAGI Referral Detail page. The interface includes a top navigation bar with links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. Below this is a secondary navigation bar with tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled "MAGI Referral Detail" and contains a "Case Summary" sidebar on the left with a search bar and a list of menu items. The main panel shows detailed case information organized into sections: Case Information (MAGI Case Number, Name, Initiated Date, Origination, Determination ID, Dispositions, Case Number, Case Name, Request ID, Type, Status, Covered CA Change, Run Reason, Benefit Month, Program), Application (Application Date, Primary Applicant/Recipient, Application Source, Life Change Event, Life Change Event Date, Requested Retro, Maintain Verifications, Consent for Verifications, R&R Agreed, Signed Status/Date), and Case Members (a table listing members with columns for Name, DOB, SSN, CIN, Non-Compliance, and CalSAWS Person).

Name	DOB	SSN	CIN	Non-Compliance	CalSAWS Person
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Yes	
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Yes	



Steps to Clear Alert

Invoice History

Linkages

General Ledger

Valuable History

Point Of Service

Case Copy List

▼ MAGI

RE Month:Begin Month:11/01/2020

Name	Status	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
[REDACTED]	Eligible	No		Projected Annual Income Used, Income Limit - Within Range
[REDACTED]	Ineligible	No		Projected Annual Income Used, Income Limit - Within Range, MEDS MEC Check

▼ APTC/CSR

Begin Month:11/01/2020CSR:No

Name	Status
[REDACTED]	Ineligible

▼ Requested Programs

CalWORKs	CalFresh	CHDP
WIC	Family PACT	SHOP
EPSDT	PCSP	

▼ Authorized Representative

Name:Organization:

E-mail:Phone Number:Type:

Begin Date:End Date:



Steps to Clear Alert		Screenshot
6	<p>On a separate tab or window:</p> <ol style="list-style-type: none">Return to the Case Summary page.From the Case Summary Page, click on the Eligibility link on the Global navigator.Click on Customer Information on the Local navigator. This will direct you to the Contact Summary Page.	
7	<p>From the Contact Summary page:</p> <ol style="list-style-type: none">Click on the EDBC Results link on the Task navigator. This will lead you to the EDBC List page.	



Steps to Clear Alert

8

From the EDBC List page:

1. Select the most recent EDBC hyperlink for the Medi-Cal program. This will navigate the user to the **Medi-Cal EDBC Summary** page.

Screenshot

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
09/2020		Homeless - Temp	Regular	Accepted - Saved	Fail	08/03/2020	Conversion
01/2022		CalWORKs	Regular	Accepted - Saved	Fail	12/08/2021	Online EDBC Rules
01/2022		CalFresh	Regular	Accepted - Saved	459.00	12/08/2021	Online EDBC Rules
01/2022		Medi-Cal	Regular	Accepted - Saved	Details	12/08/2021	Online EDBC Rules
04/2022	04/2022	Medi-Cal	Regular	Accepted - Saved	Details	03/05/2022	Batch EDBC Rules



Steps to Clear Alert		Screenshot	
9	Review the Medi-Cal EDBC Summary and compare it to the information captured in the MAGI Referral Detail page.		
	<p>If both the Medi-Cal EDBC Summary and the MAGI Referral Detail page show that the eligibility is accurate, proceed to STEP 10 of this document.</p> <p>If the MAGI Referral Detail page show that there are pending eligible individual(s), further case review will be required. Proceed to STEP 18 of this document.</p>		



Steps to Clear Alert		Screenshot
10	<p>From the Medi-Cal EDBC Summary page:</p> <ol style="list-style-type: none">Click on the Run EDBC link on the Task navigator. This will navigate the user to the Run EDBC page.	
11	<p>In the Run EDBC page:</p> <ol style="list-style-type: none">Select the desired program (Medi-Cal) and ensure the Begin and End Month are correct.Click the Run EDBC button. This will direct you to the EDBC List page.	



Steps to Clear Alert

12

The **EDBC List** page will display the most recent EDBC results for all programs associated to the case.

★

If necessary, you can search for a specific budget by selecting the following criteria: Program, Type Reason, Run Status, From/To

1. Click on the hyperlink for the program (Medi-Cal). This will direct you to the **Medi-Cal EDBC Summary** page, where one can view the eligibility determination results.

(Hint: The EDBC results that were requested will show a run status of “Not Accepted”)

Screenshot

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
09/2020		Homeless - Temp	Regular	Accepted - Saved	Fail	08/03/2020	Conversion
01/2022		CalWORKs	Regular	Accepted - Saved	Fail	12/08/2021	Online EDBC Rules
01/2022		CalFresh	Regular	Accepted - Saved	459.00	12/08/2021	Online EDBC Rules
01/2022		Medi-Cal	Regular	Accepted - Saved	Details	12/08/2021	Online EDBC Rules
06/2022		Medi-Cal	Regular	Not Accepted	Details	05/11/2022	Online EDBC Rules

Page 11



Steps to Clear Alert

13 The **Medi-Cal EDBC Summary** page will display the following:

- Benefit Month and Program Status
- EDBC Information
- Program Configuration
- Reporting Configuration
- Medi-Cal Summary

The eligibility for this household should reflect the accurate eligibility for the benefit program (Medi-Cal). The EDBC results can be saved by clicking the **Accept** button located on the top right or bottom right of the summary. This will redirect you to the **EDBC List** page.

Screenshot

CalSAWS

Case Name: Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tool

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Medi-Cal EDBC Summary

AcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
06/2022		05/11/2022	Not Accepted	

EDBC Information

Type: Regular

Recalculation: No

EDBC Ran for MAGI Only: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
		MEM		Active		
		MEM		Discontinued	Did not Request Full Medi-Cal Hierarchy	

Medi-Cal Summary

Note: Overridden rows are in bold.

Eligible Budgets for MEDS

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
MAGI	Pass	\$0	0.00				FRI	Doesn't Meet Program Req.
					M1		MEM	

Failed and Overridden Budgets

Test	Result	SOC	% Oblig	Aid Code	Members Tested	Role	Role Reason
TMC	Fail	\$0	0.00			FRI	Did not Request Full Medi-Cal Hierarchy
						FRI	Did not Request Full Medi-Cal Hierarchy

Override Medi-Cal Summary

AcceptCancel



Steps to Clear Alert

14

Once the Medi-Cal program EDBC results have been saved, the **EDBC List** page will display the following:

- A message to inform the user that a Notice of Action was created.

- A **Preview NOA** button, which allows the user to view the notice prior to distribution.

- A **Save and Continue** button, which allows the user to save all the actions taken.

Review the NOA's for accuracy:

1. Click the **Save and Continue** button. This will direct the user to the **Distributed Documents Search** page, where the NOA will be in a **Pending Review** status.

Screenshot

CalSAWS Case Number: [redacted]

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Customer Information

Case Number: [redacted] Go

Person Search

► Non Financial

► Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

► ABAWD

EDBC List

• Medi-Cal NOA run is complete - NOA generated

Display by:

Program: [dropdown] Type Reason: [dropdown] Run Status: [dropdown] From: 05/2022 To: 06/2022 View

Search Results Summary Results 1 - 5 of 5

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
09/2020		Homeless - Temp	Regular	Accepted - Saved	Fail	08/03/2020	Conversion
01/2022		CalWORKs	Regular	Accepted - Saved	Fail	12/08/2021	Online EDBC Rules
01/2022		CalFresh	Regular	Accepted - Saved	459.00	12/08/2021	Online EDBC Rules
01/2022		Medi-Cal	Regular	Accepted - Saved	Details	12/08/2021	Online EDBC Rules
06/2022		Medi-Cal	Regular	Accepted - Not Saved	Details	05/11/2022	Online EDBC Rules

Preview NOAs Save and Continue Cancel



Steps to Clear Alert

Screenshot

15 In the **Distributed Documents** Search:

1. Click on the hyperlink for the NOA with the “**Pending Review**” status to view the NOA and select a method of distribution. If the NOA is not reviewed it will go out due to an overnight batch process.

The screenshot displays the CalSAWS web application interface. At the top, there's a navigation bar with links like Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. Below this is a secondary navigation bar with tabs for Case Info, Eligibility (which is selected), Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. On the left side, there's a sidebar menu with options like Customer Information, Case Number search, Person Search, Non Financial, Financial, Verifications, MC 355, EBT Account List, MAGI Verifications, MAGI Eligibility, Run EDBC, Manual EDBC, and Needs. The main content area is titled 'Distributed Documents Search'. It includes a search bar with a 'Go' button and a 'Refine Your Search' link. Below the search bar is a 'Search Results Summary' section showing 'Results 1 - 1 of 1'. The results are presented in a table with columns: Date, Document Name, Number, Program, Status, and Viewed Via Self-Service Portal. The first and only result is dated 05/11/2022 7:54 AM, with the document name 'NOA - MC - MIXED HA HT - MAGI Approval and Discontinuance', number 1, program Medi-Cal, and status Pending Review. Red arrows highlight the document name and the 'Pending Review' status. A 'Details' button is located to the right of the status. At the bottom right of the results table, there is an 'Images' button.

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
05/11/2022 7:54 AM	NOA - MC - MIXED HA HT - MAGI Approval and Discontinuance	1	Medi-Cal	Pending Review	Details



Steps to Clear Alert		Screenshot	
16	<p>Users will be directed to a PDF preview of the NOA. Users will have the following options:</p> <ul style="list-style-type: none">- Append: User can make limited edits to NOA if necessary- Save and Print Locally: User will save NOA to the case and will need to manually print the NOA for distribution.- Save and Print Centrally: User will save the NOA to the case and the NOA will be sent out by central printing during nightly batch- Reject: User will reject the NOA, the NOA will still display in the case as a rejected status- Cancel: User can cancel, this will leave the NOA in a “pending review” status. <p>Select the appropriate status for the NOA. This will update the status in the Distributed Document Search page.</p>		
17	<p>This case review is complete.</p> <p>Document all actions taken per county policy, including journal entries, and the sending out any applicable Notices of Action.</p> <p>The Yellow Banner will no longer appear on the case.</p> <p>Do not proceed to Step 18.</p>		



Steps to Clear Alert		Screenshot
18	<p>The MAGI Referral Detail on Step 5 is showing that there are individual(s) with a Pending Eligible status coming from CalHEERs. Eligibility for the individual(s) must be reviewed and redetermined to remove the Yellow Banner.</p> <p>Review the following pages for any pending information:</p> <ul style="list-style-type: none">- Verifications (Step 19)- Income (Step 20)- Tax Household (Step 21)- Customer Information- Non-Financial and Financial Data Collection pages (Step 22) <p>Once a full case review is complete, go to step 23.</p> <p>Additional Job Aids are available in CalSAWS in the Help Icon located in the Utilities navigator:</p> <p>JA EDBC – Troubleshooting Incorrect Results</p>	



Steps to Clear Alert		Screenshot
19	<div>Verifications List Page</div> <p>Users can review pending verifications/information and take appropriate case action, following program regulation.</p> <p>To identify any pending verifications that are applicable in making a benefit determination for individual(s), users will navigate to the Verifications List page.</p> <p>Additional CalSAWS Job Aids are available in CalSAWS located in the Help Icon located in the Utilities navigator:</p> <p>JA Verifications – Manage</p>	



Steps to Clear Alert

Screenshot

20 Income

The user should review the income entries for all applicable household members and take appropriate case action to address any discrepancies that places the individual(s) in a Pending Eligible Status.

Additional CalSAWS Quick Guides and Job Aids available in LMS:

JA Income Categories and Types in the System

JA Medi-Cal – Income In-Kind – Unearned

JA Foster Care Income and Property Detail Page

JA SSIAP – SSI (Disability)

CalSAWS Case Number: [Redacted]

Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Customer Information

Case Number: [Redacted] Go

Person Search

► Non Financial

▼ Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS Applicant

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Income List

* - Indicates required fields

Images Continue

► Root Questions

▼ CalHEERS Verifications

Name	Current Monthly Income	Federal Subsidy Income	State Subsidy Income	Verify Current Income
[Redacted]	E-Verified	Not Verified	Not Verified	
[Redacted]	E-Verified	Not Verified	Not Verified	

Search Results Summary Results 1 - 2 of 2

Display From: [Redacted] To: [Redacted] View


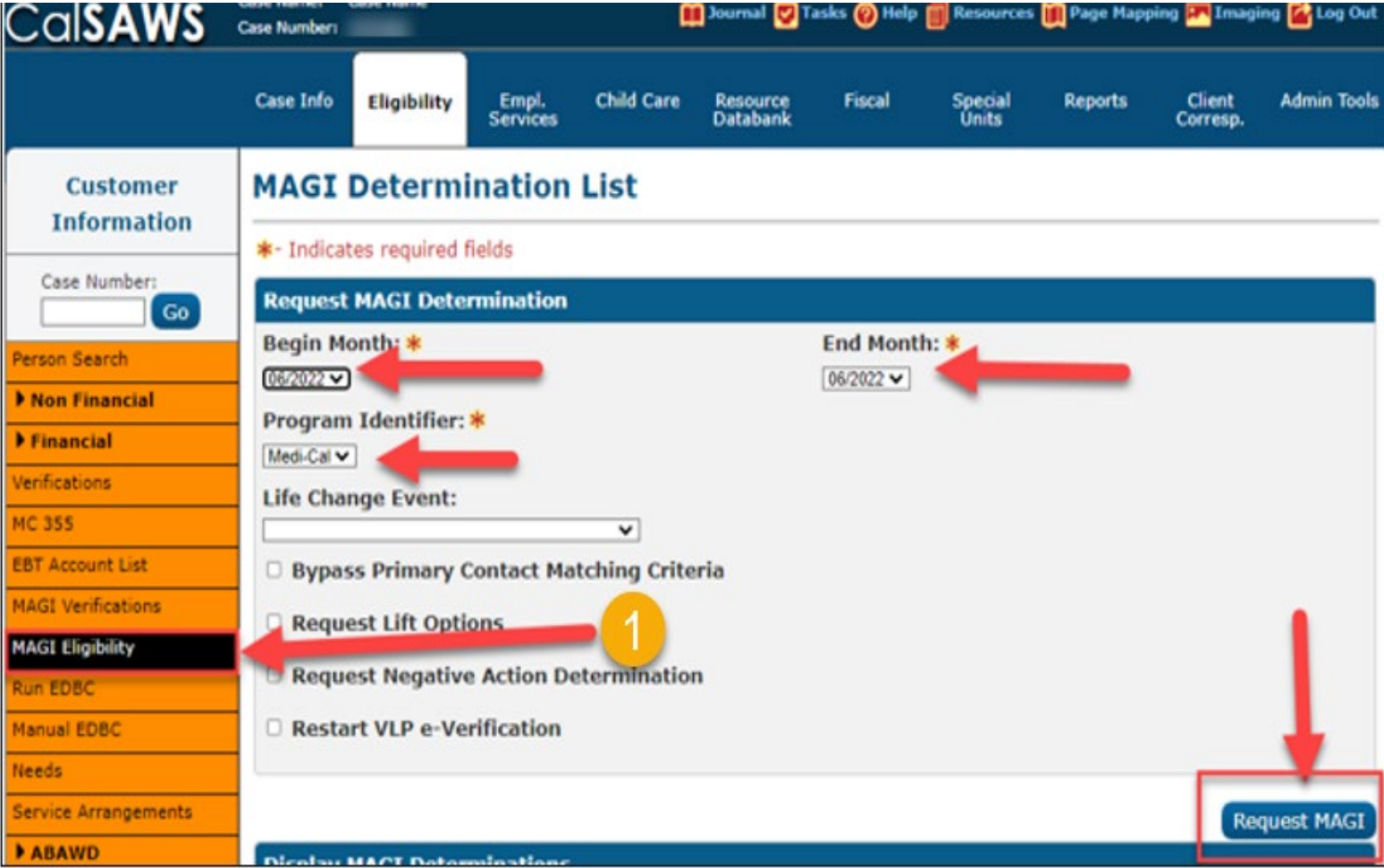
Name	Category	Type	Source	Begin Date	End Date	
<input type="checkbox"/> [Redacted]	Unemployment	UIB	EDD	09/01/2021		Edit View History
<input type="checkbox"/> [Redacted]	Earnings	Salary, Wages	Platinum Security	01/07/2022		Edit View History

Remove Income Category: * [Redacted] Add

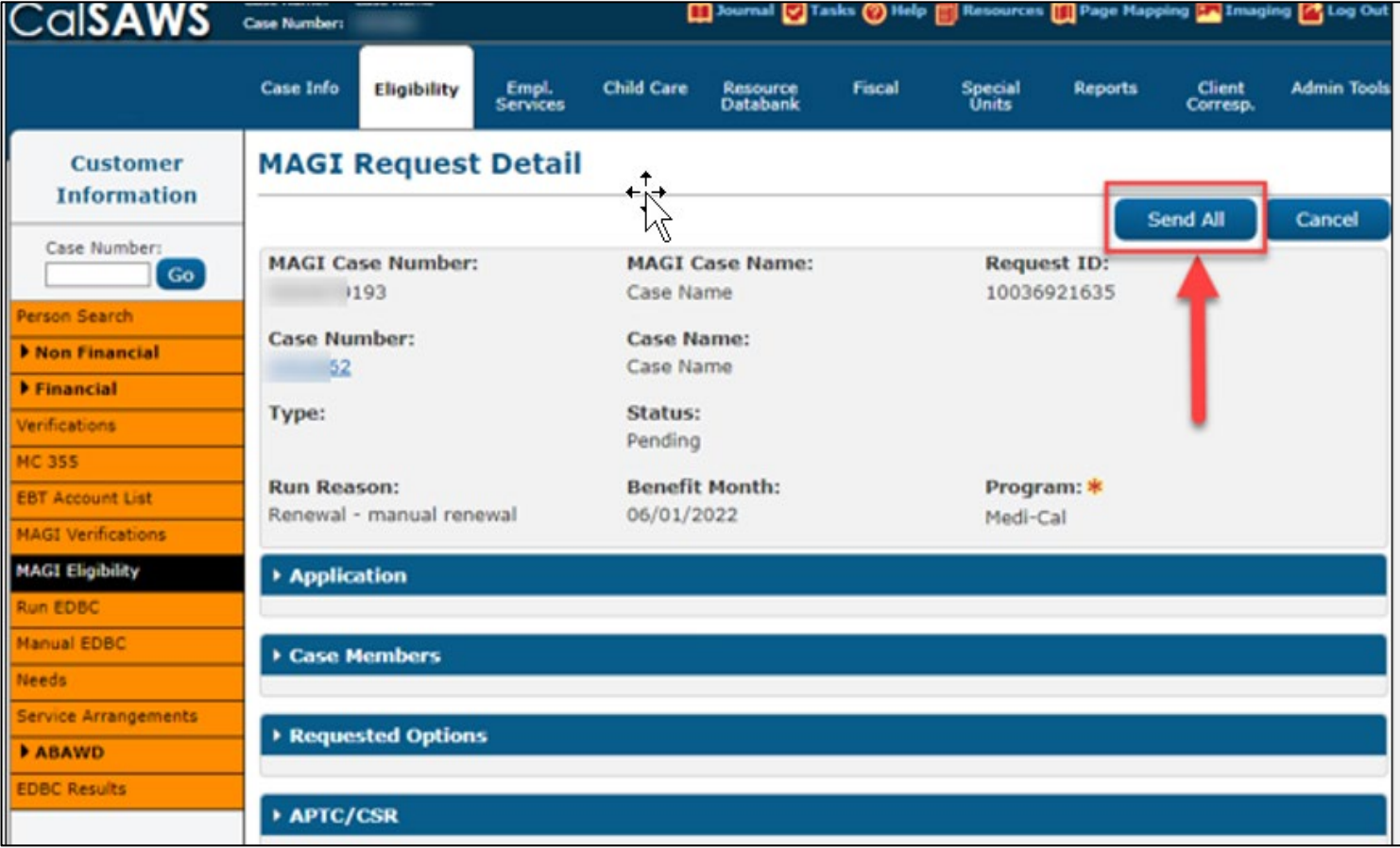


Steps to Clear Alert		Screenshot
21	<div>Tax Household</div> <div>Review the Tax Household information for accuracy on the Tax Household List page on the Task navigator. Users can edit existing entries and add new entries for the necessary tax year.</div>	
22	<div>Non-Financial and Financial</div> <div>The user should conduct a review of all other applicable data collections pages in both the Non-Financial and Financial pages in CalSAWS.</div>	

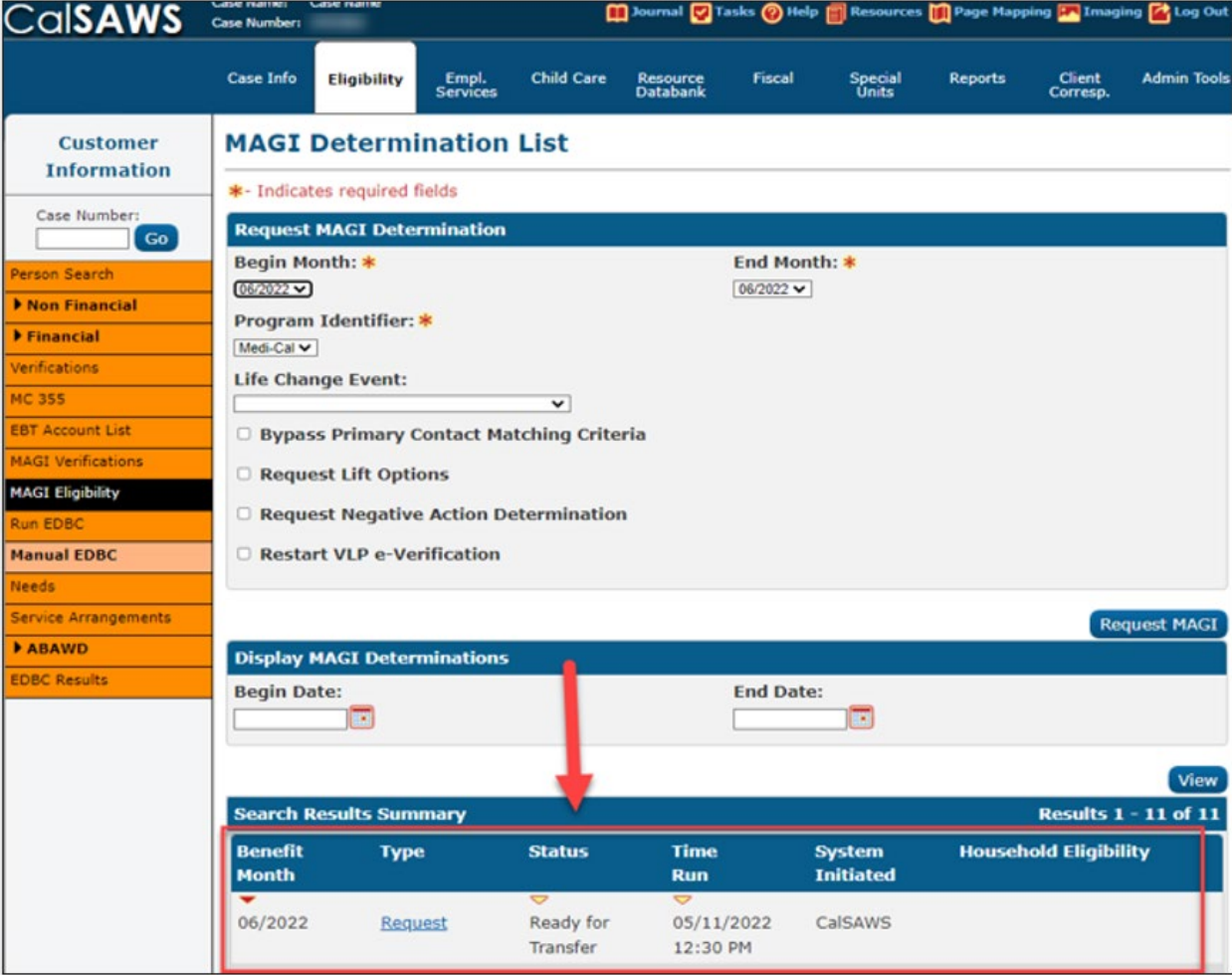
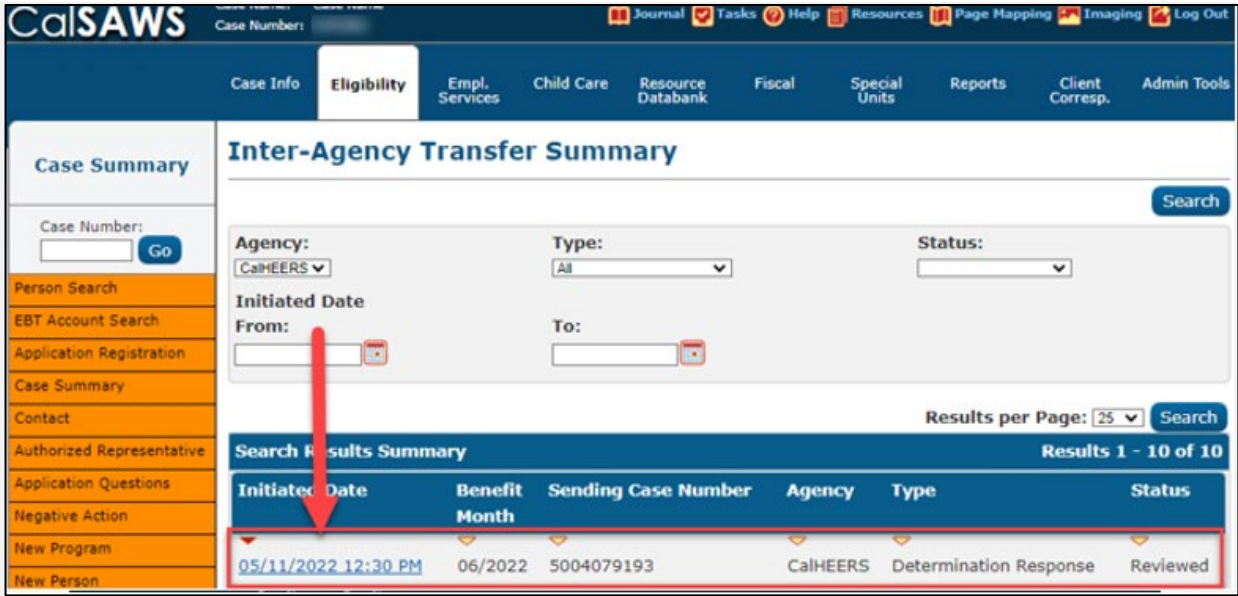


Steps to Clear Alert		Screenshot	
23	<p>Once a full case review is complete, Users can request a MAGI Determination.</p> <p>1. Click on MAGI Eligibility in the Task navigator. Users will be directed to the MAGI Determination List page.</p> <p> The user will need to ensure the following information is accurate prior to making the request:</p> <ul style="list-style-type: none">- Begin/End Month- Program Identifier- Life Change Event (if applicable) <p>Once information is verified, Users can click the Request MAGI button. This will direct Users to the MAGI Request Detail page.</p>		



Steps to Clear Alert		Screenshot
24	<div>The MAGI Referral Detail page will display the following information that CalSAWS will transmit to CalHEERS:</div> <div><ul style="list-style-type: none">- MAGI Case Information- Application Information- Case Member Details- MAGI Eligibility Determination- APTC/CSR Eligibility Determination- Requested Programs Detail- Authorized Representative Detail- Comments- Worker Information- Status History</div> <div>Users can review information, and once confirmed for accuracy, Users can click the Send All button to send the request. Users will be routed back to the MAGI Determination List page.</div>	



Steps to Clear Alert		Screenshot
25	The MAGI Determination List will show that a request has been sent to CalHEERS	
26	Once a response is received from CalHEERS to CalSAWS, the user can follow STEPS 3 and 4 to access the information on the Inter-Agency Transfer Summary page. MAGI Requests are located under Search Result Summary . Users can click on the hyperlink to access the MAGI Referral Details page.	



Steps to Clear Alert

27 The MAGI Referral Detail page will provide the eligibility determination for the individual(s).

If the determination is correct, the user can follow **STEPS 10 -17**, to run EDBC in CalSAWS and remove the Yellow Banner. The case review is complete, no further action is necessary.

If the determination is incorrect, the user will need to review the data collection pages and follow **STEPS 18-27** until the appropriate eligibility determination response is received from CalHEERs. Once the accurate determination response is received the user can follow **STEPS 10-17**. The case review is complete, no further action need be taken.

Screenshot

CalSAWS

Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Case Summary

Case Number: Go

Person SearchEBT Account SearchApplication RegistrationCase SummaryContactAuthorized RepresentativeApplication QuestionsNegative ActionNew ProgramNew PersonHide PersonEBT Account ListIssuance HistoryAuxiliary Authorization ListExpungement HistoryChild Support CollectionsTime Limit Aid SummaryHousing SupportHome VisitingLegacy Case

MAGI Referral Detail

EditClose

MAGI Case Number:

MAGI Case Name:

Initiated Date:05/11/2022 12:30 PM

Origination:

Determination ID:

Case Number:

Case Name:

Request ID:

Type:Determination Response

Status:★Reviewed

Covered CA Change:

Run Reason:Renewal - manual renewal

Benefit Month:06/01/2022

Program:★Medi-Cal

Application

Case Members

MAGI

RE Month:Begin Month:06/01/2022

Name	Status	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
<input type="text"/>	Eligible	No		