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.

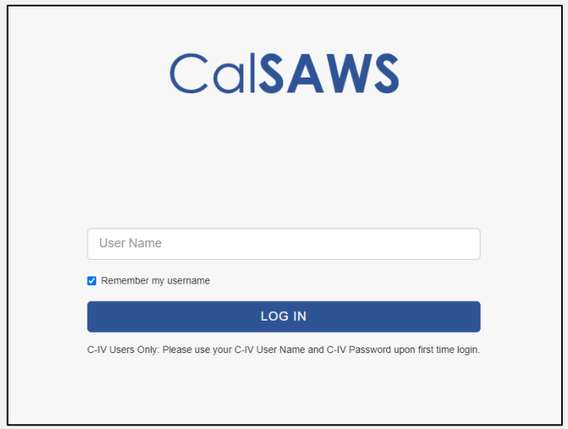
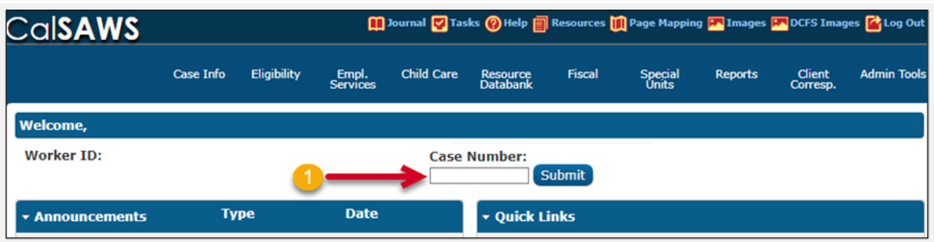
Note: The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most commonly impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that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

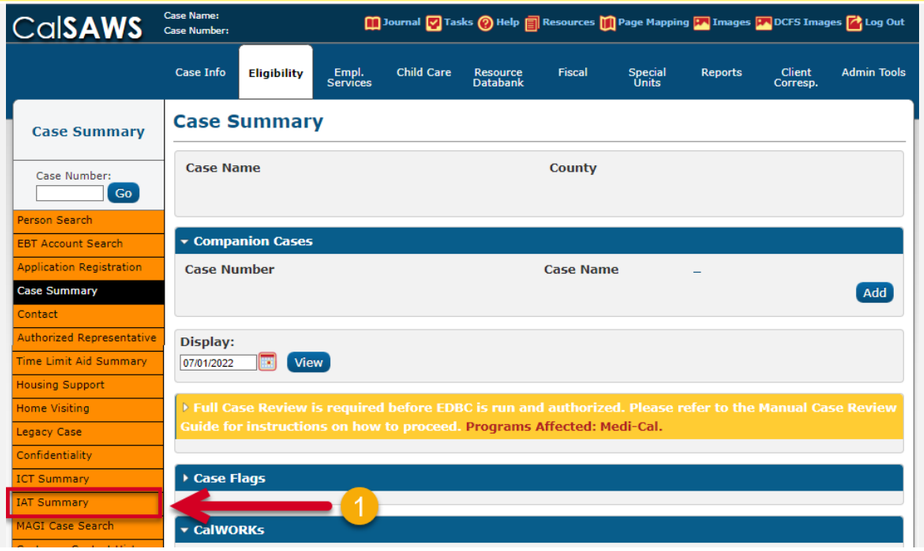
Example:

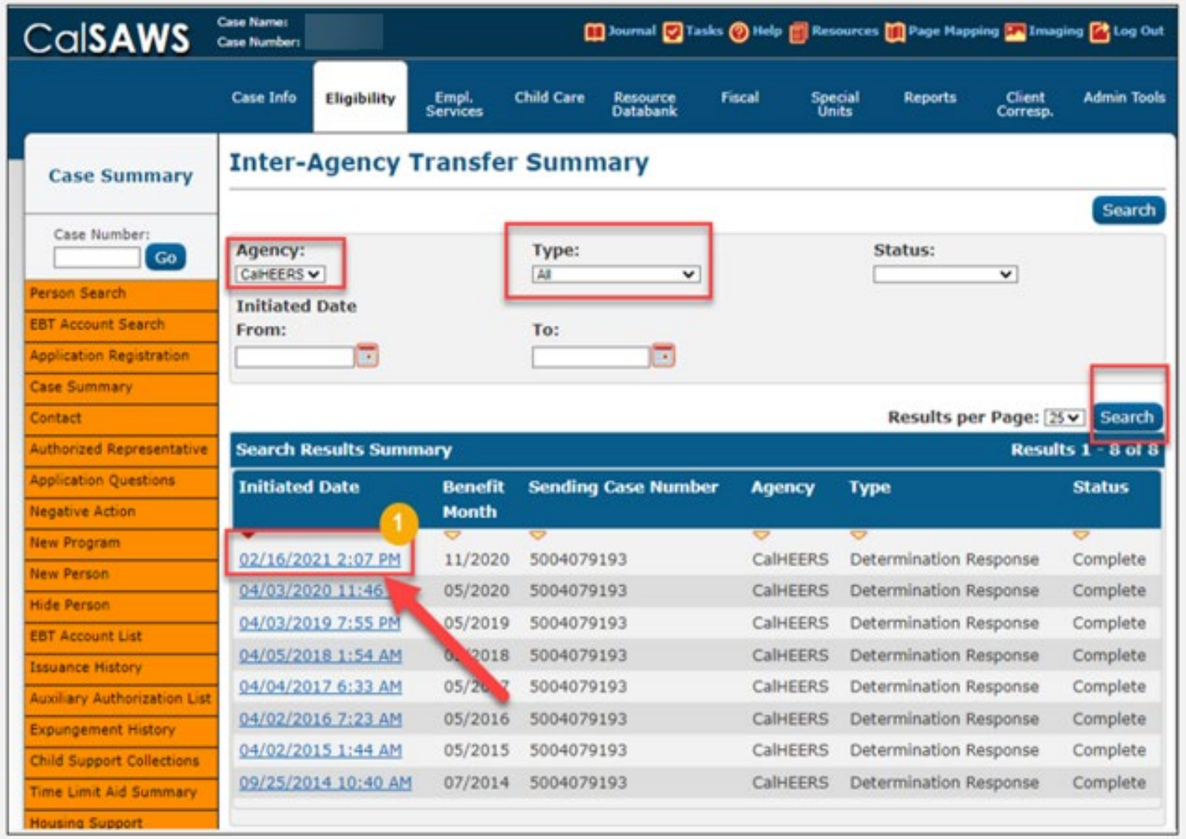
Worker will need to conduct a full case review for this Medi-Cal Program case with a Yellow Banner. The CalSAWS user will need to review the CalHEERs Referral (IAT Summary) and compare it to the CalSAWS Eligibility Determination Budget Calculation (EDBC) results converted over from CalWIN.

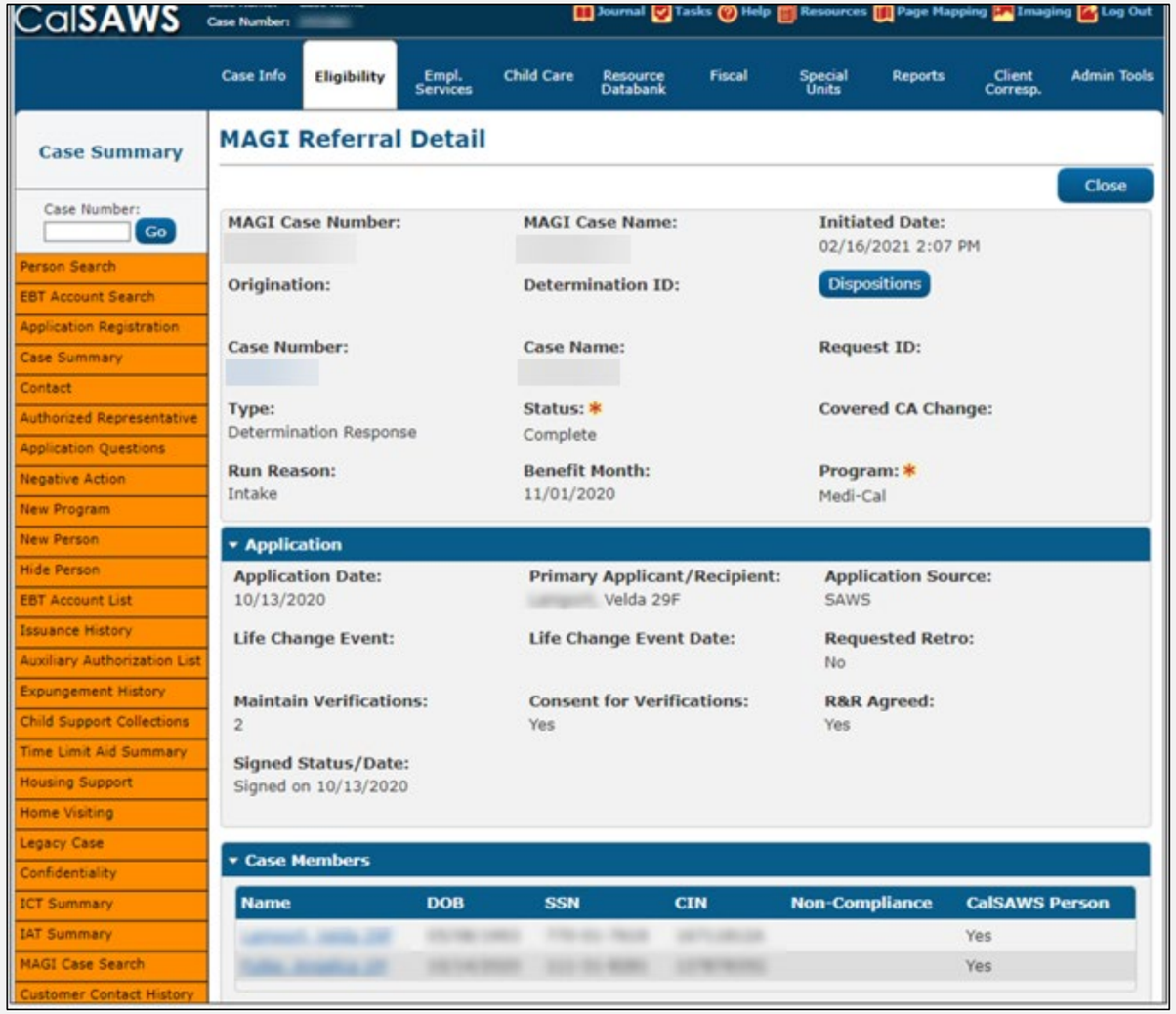
If the eligibly determination matches both in the CalHEERs Referral and the EDBC Results converted from CalWIN, the CalSAWS user can proceed to run EBDC. This action will confirm the eligibility of the individual(s) and remove the Yellow Banner. (Steps 1 – 17)

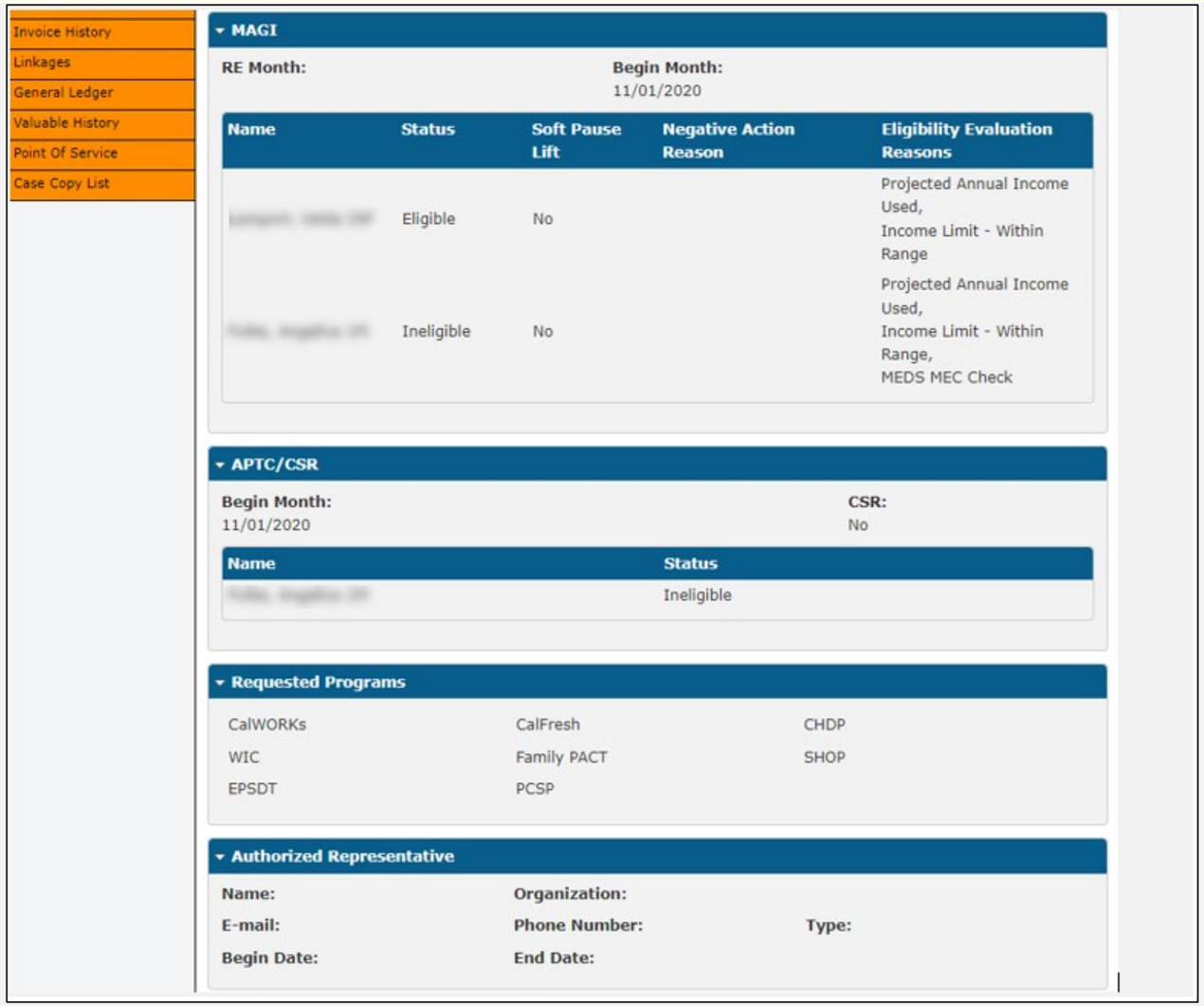
If the eligibility determination in the CalHEERs Referral does not match the EDBC results, the CalSAWS user will proceed to conduct a Full Case Review and update necessary data collection pages (i.e., Income, Tax Household, etc.). Once the necessary updates are made within the CalSAWS system, the CalSAWS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

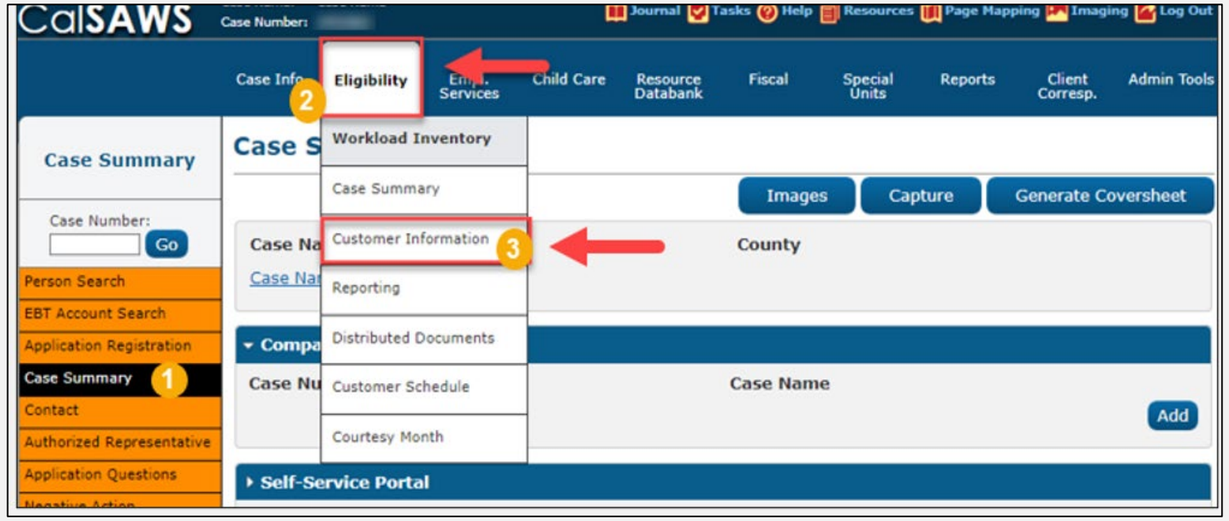
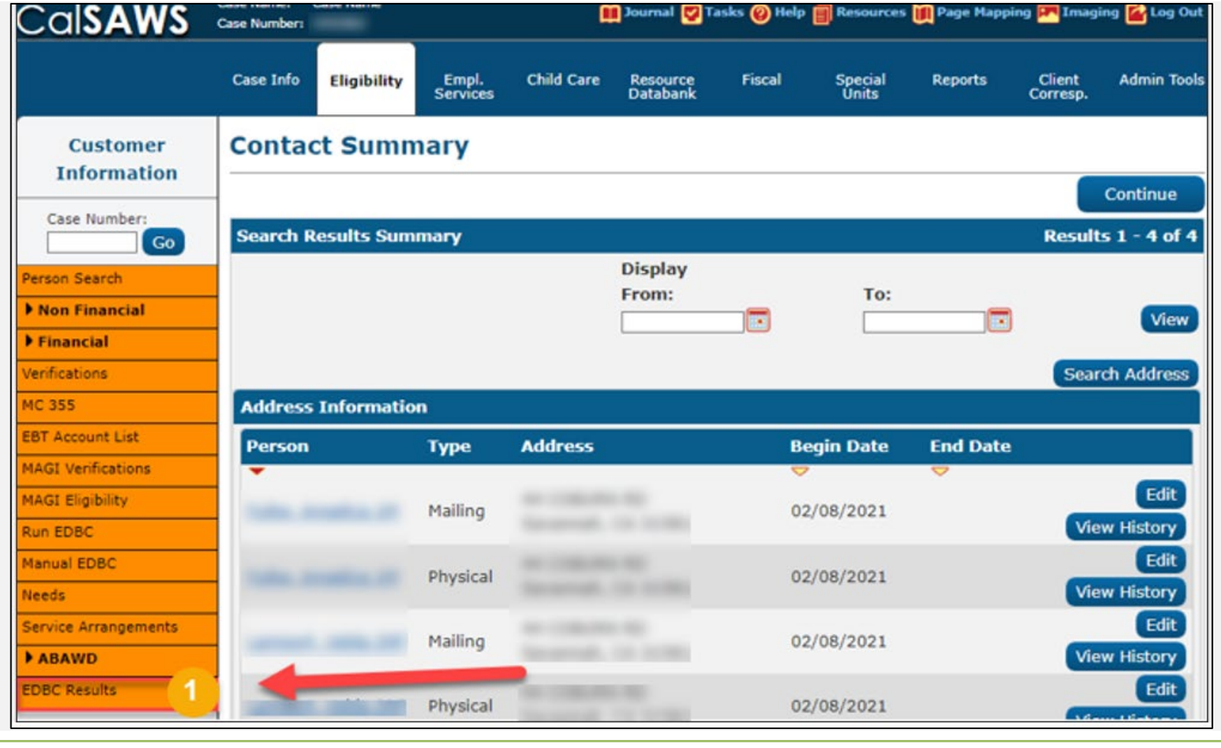
	Steps to Clear Alert	Screenshot
1	Log in to CalSAWS by entering your Username and Password	
2	On the Homepage: 1. Enter the case number and click on the submit button to be directed to the Case Summary page. ★ Note - this step is not necessary if already in the Case Summary page for the desired case	

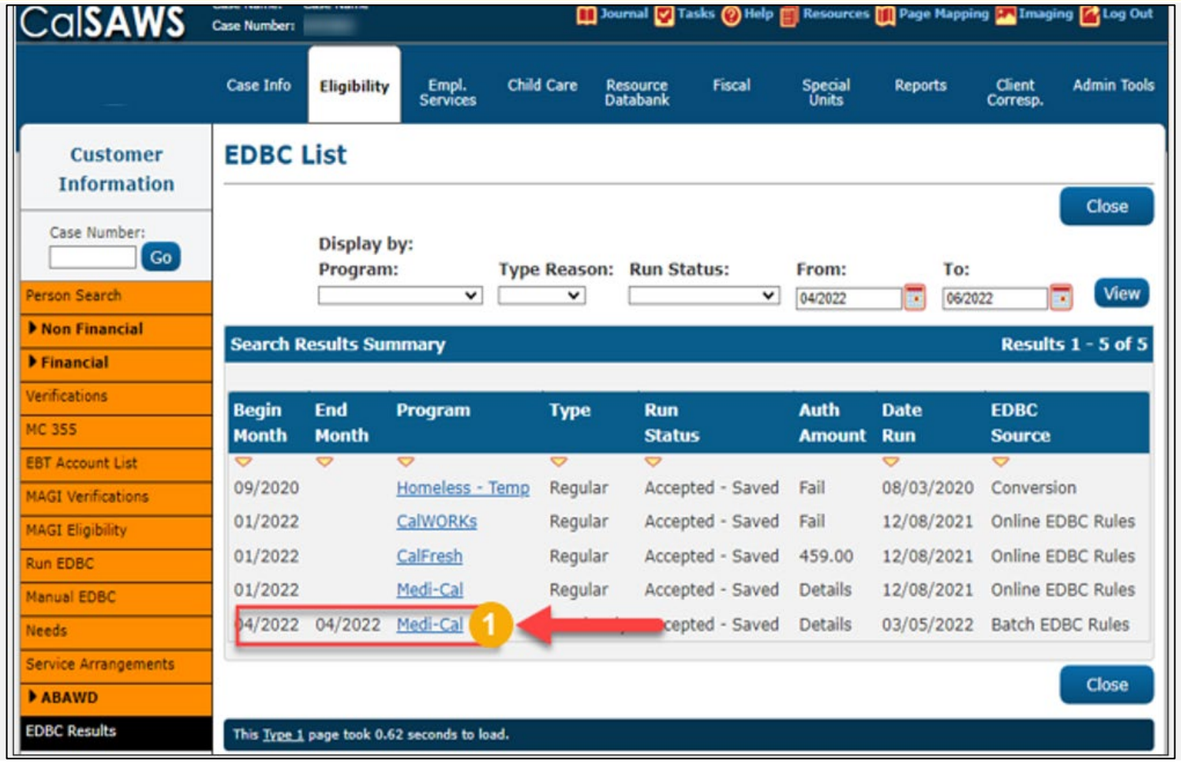
Steps to Clear Alert	Screenshot
3 On the Case Summary Page: 1. Click on the **IAT Summary** link on the Task Navigator. This navigates the user to the **Inter-Agency Transfer Summary** page.	

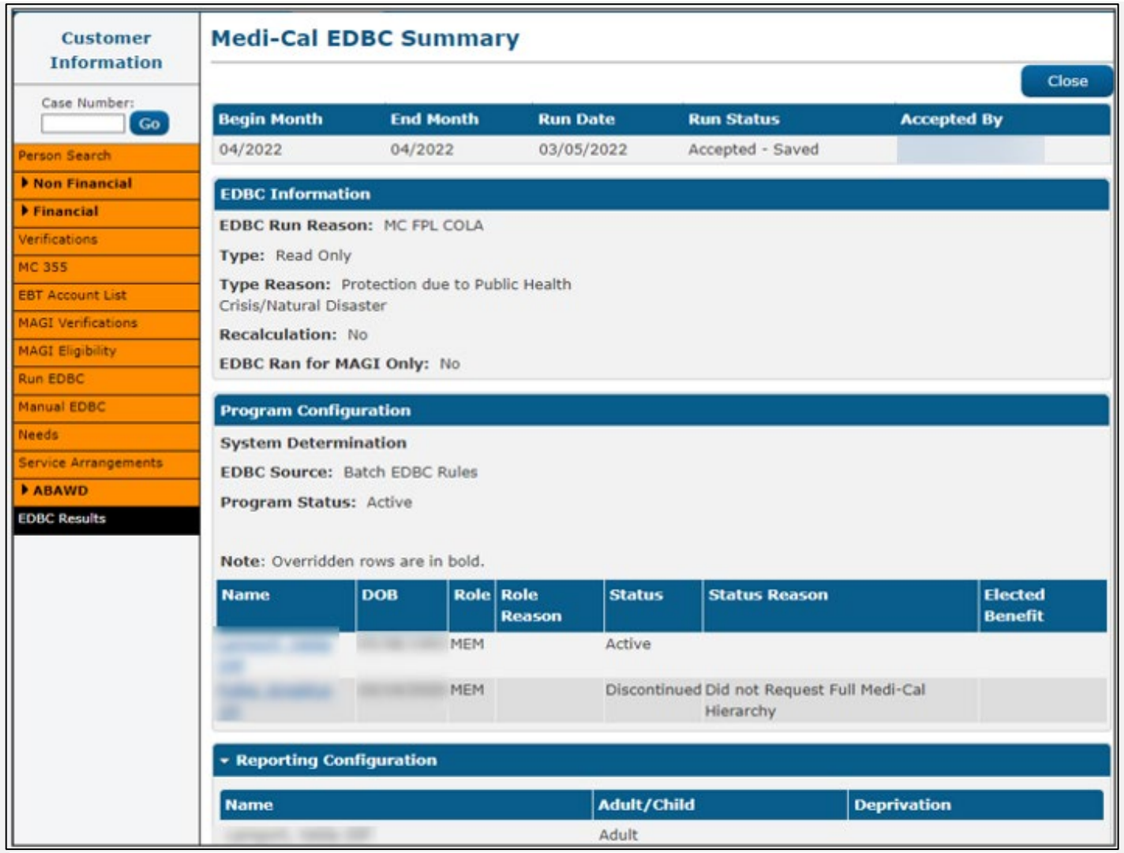
Steps to Clear Alert	Screenshot
4 Once directed to the **Inter-Agency Transfer Summary**, the page should display the most recent transfers associated to this case. Note: A manual search can be conducted by filling in the search criteria listed on the screen. - Agency: CalHEERs - Type - Status - Initiated Date (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.	

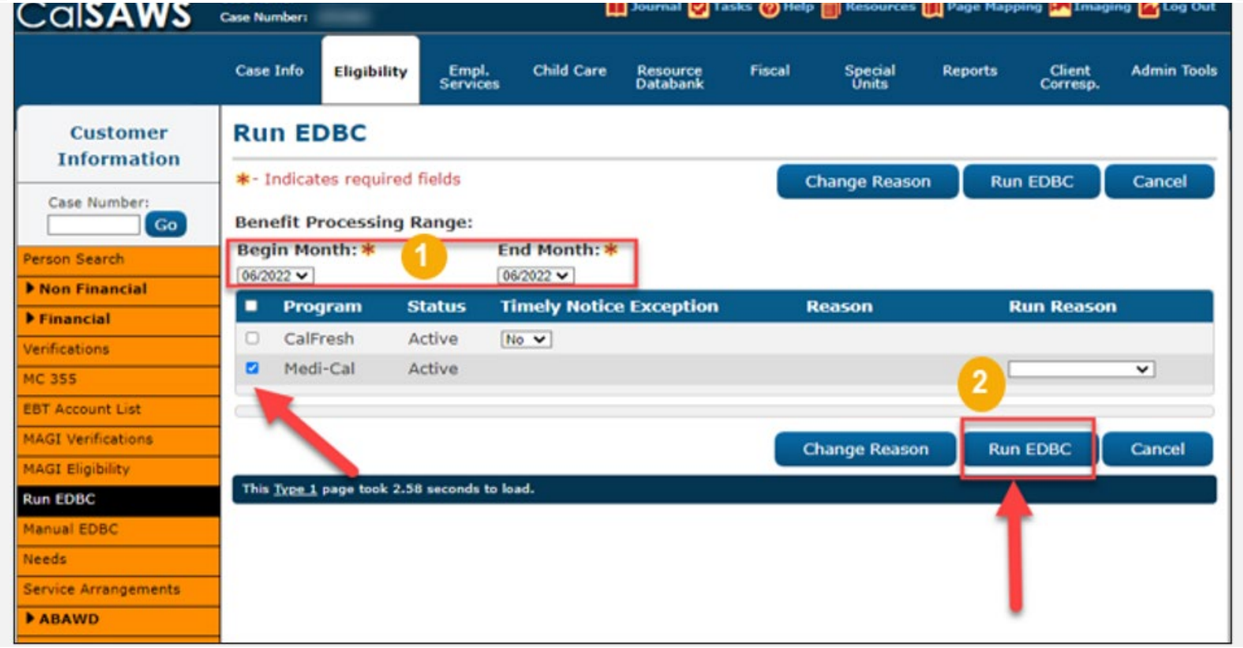
Steps to Clear Alert	Screenshot
5 The **MAGI Referral Detail** page will display the following information sent from CalHEERs to CalSAWS: - MAGI Case Information - Application Information - Case Member Details - MAGI Eligibility Determination - APTC/CSR Eligibility Determination - Requested Programs Detail - Authorized Representative Detail - Comments - Worker Information - Status History	

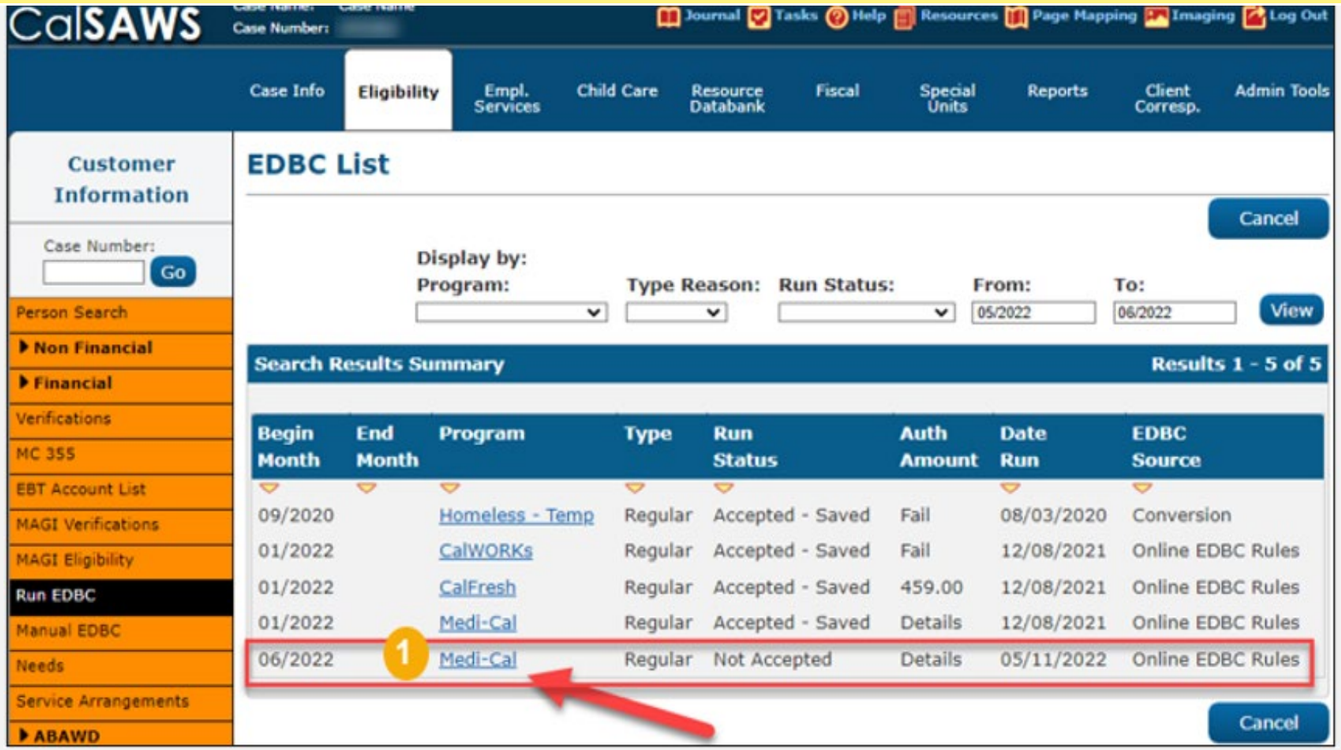
Steps to Clear Alert	Screenshot
	

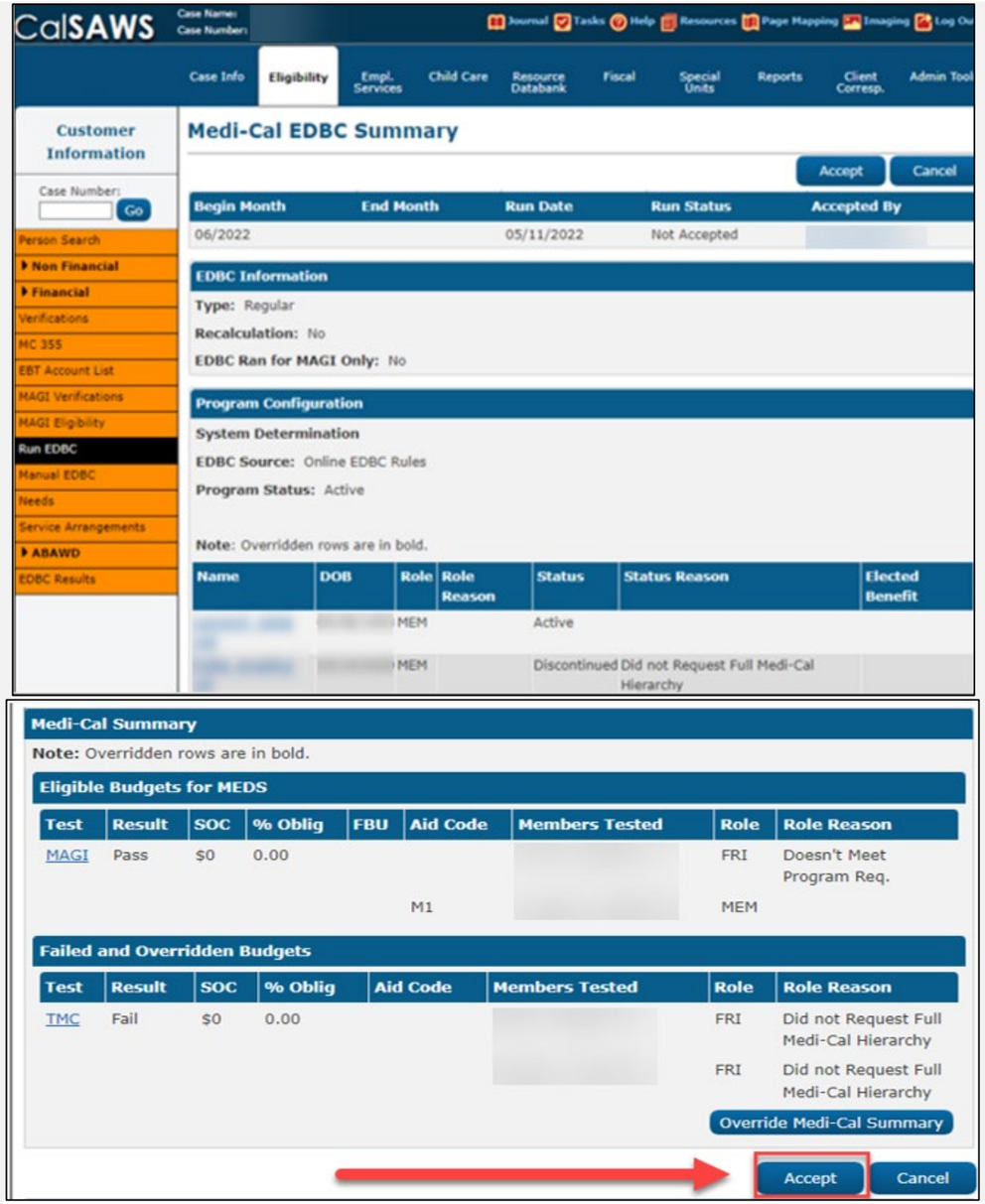
Steps to Clear Alert		Screenshot
6	On a separate tab or window: 1. Return to the **Case Summary** page. 2. From the **Case Summary** Page, click on the **Eligibility** link on the Global navigator. 3. Click on **Customer Information** on the Local navigator. This will direct you to the **Contact Summary Page**.	
7	From the **Contact Summary** page: 1. Click on the **EDBC Results** link on the Task navigator. This will lead you to the **EDBC List** page.	

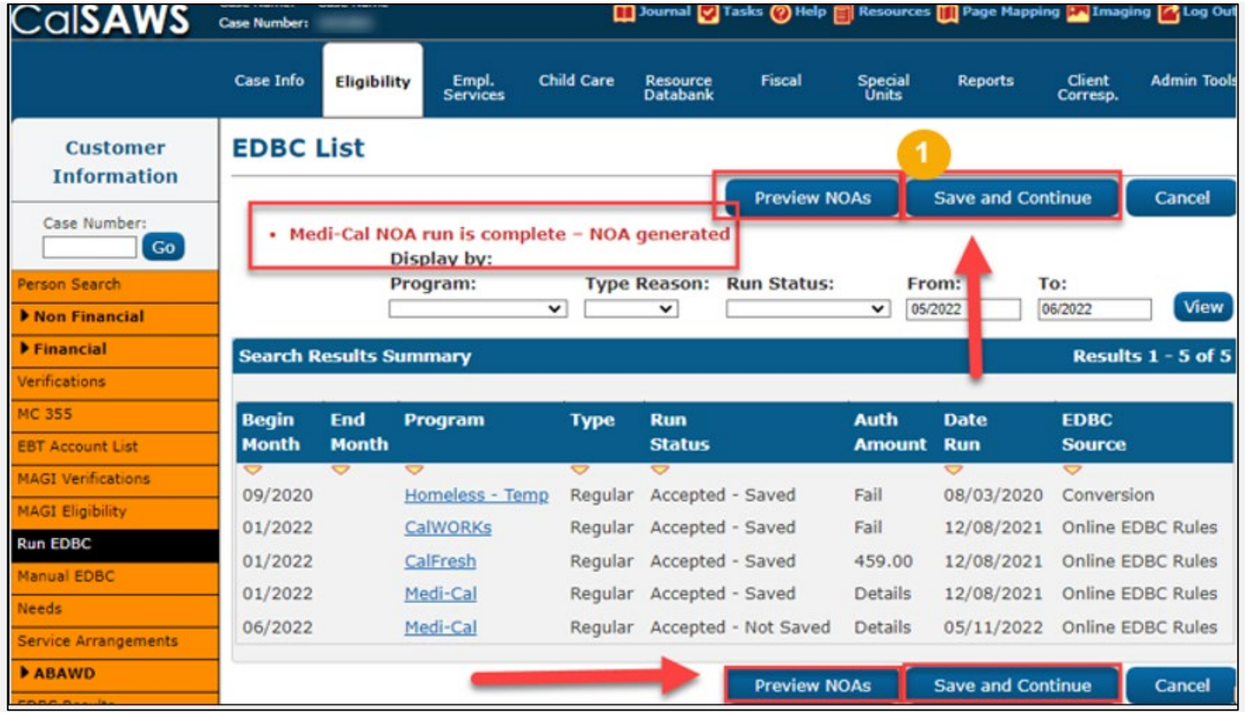
Steps to Clear Alert	Screenshot
8 From the EDBC List page: 1. Select the most recent EDBC hyperlink for the Medi-Cal program. This will navigate the user to the **Medi-Cal EDBC Summary** page.	

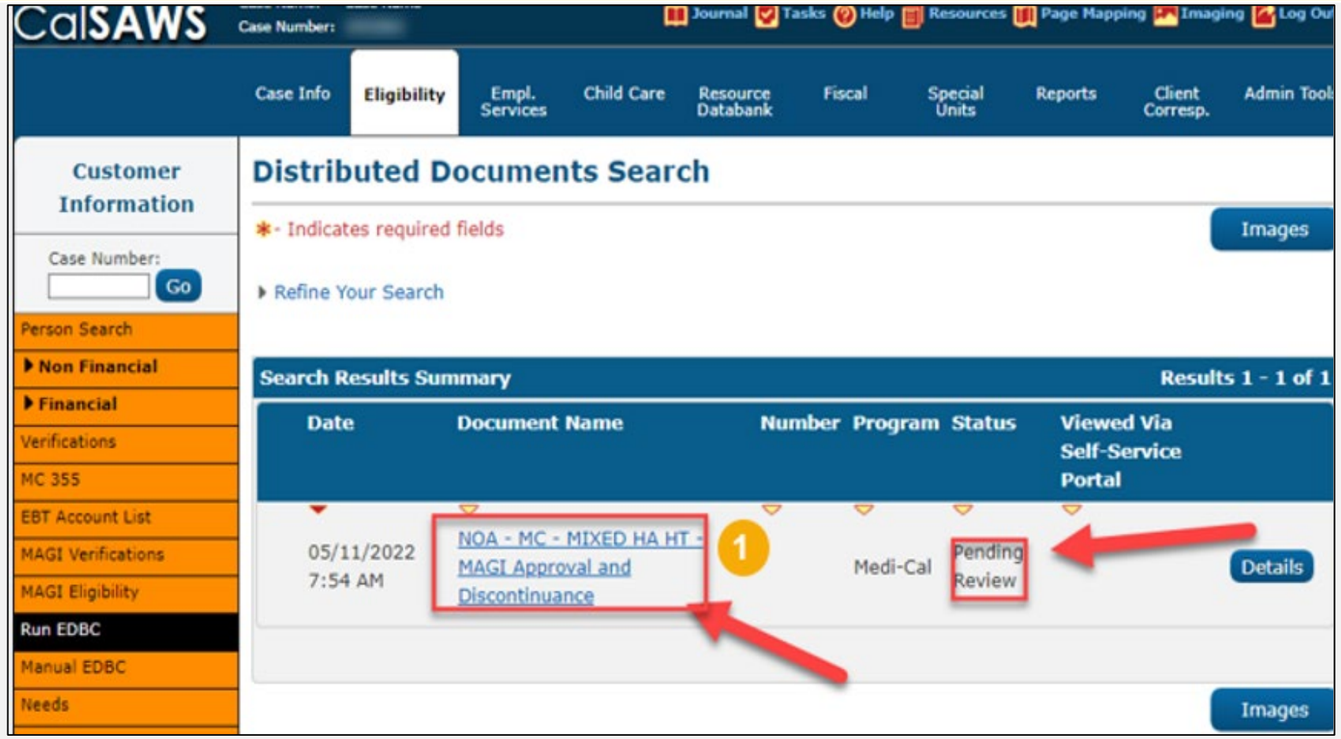
Steps to Clear Alert	Screenshot
9 Review the Medi-Cal EDBC Summary and compare it to the information captured in the **MAGI Referral Detail** page. If both the **Medi-Cal EDBC Summary** and the **MAGI Referral Detail** page show that the eligibility is accurate, proceed to **STEP 10** of this document. 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.	

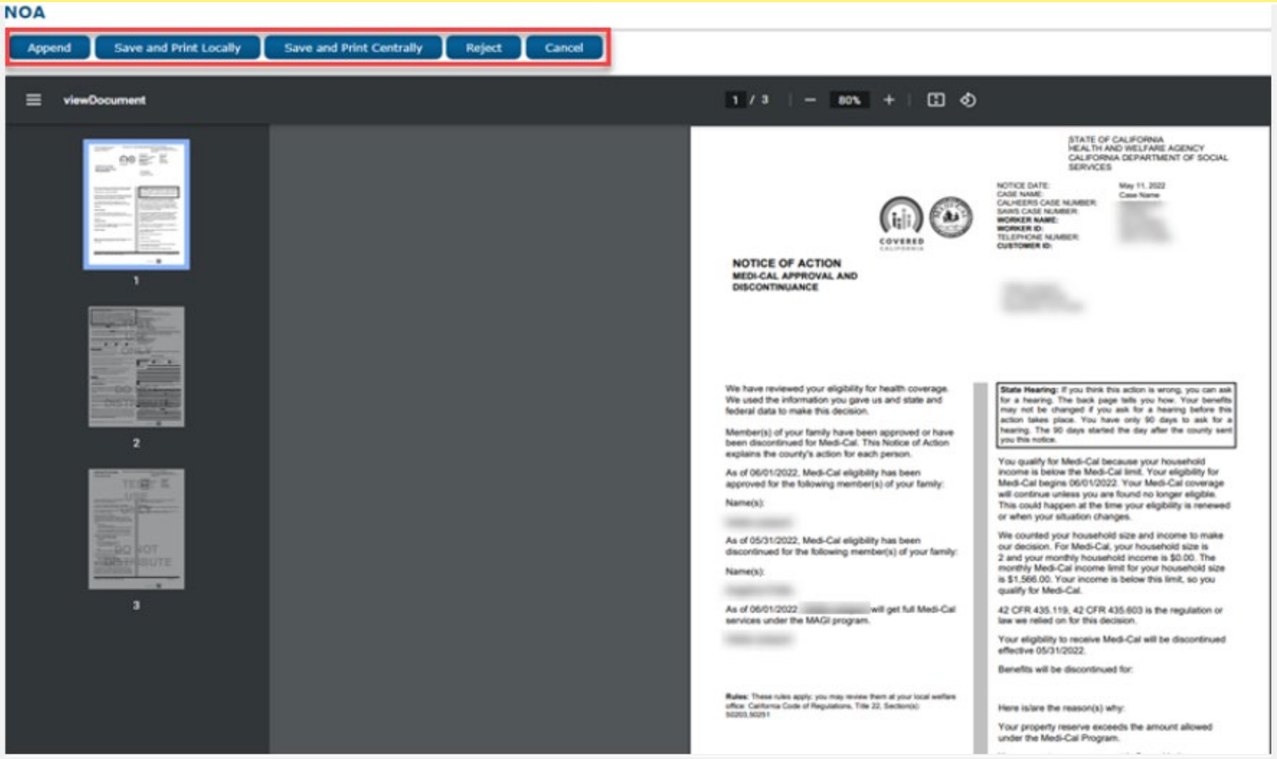
Steps to Clear Alert	Screenshot
10 From the Medi-Cal EDBC Summary page: 1. Click on the **Run EDBC** link on the Task navigator. This will navigate the user to the **Run EDBC** page.	
11 In the **Run EDBC** page: 1. Select the desired program (Medi-Cal) and ensure the Begin and End Month are correct. 2. Click the **Run EBDC** button. This will direct you to the **EDBC List** page.	

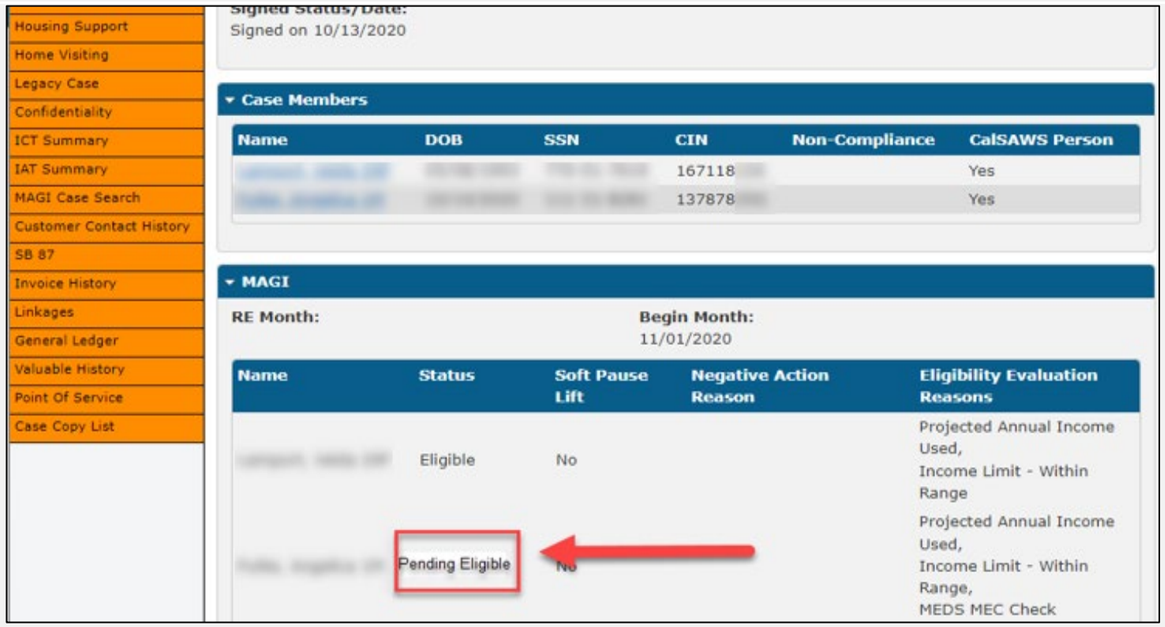
Steps to Clear Alert	Screenshot
12 The **EDBC List** page will display the most recent EDBC results for all programs associated to the case. ★ If necessary, you can search for a specific budget by selecting the following criteria: Program, Type Reason, Run Status, From/To 1. Click on the hyperlink for 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")**	

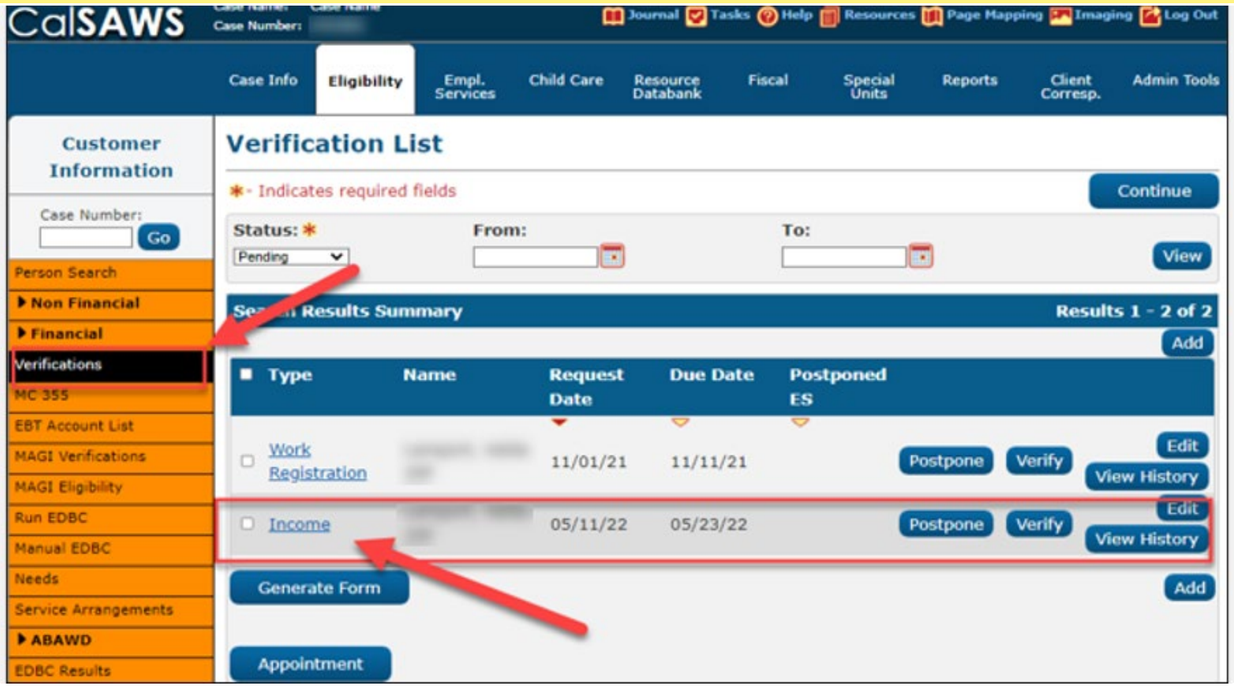
Steps to Clear Alert	Screenshot
13 The **Medi-Cal EDBC Summary** page will display the following: - Benefit Month and Program Status - EDBC Information - Program Configuration - Reporting Configuration - Medi-Cal Summary The eligibility for this household should reflect the accurate eligibility for the 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.	

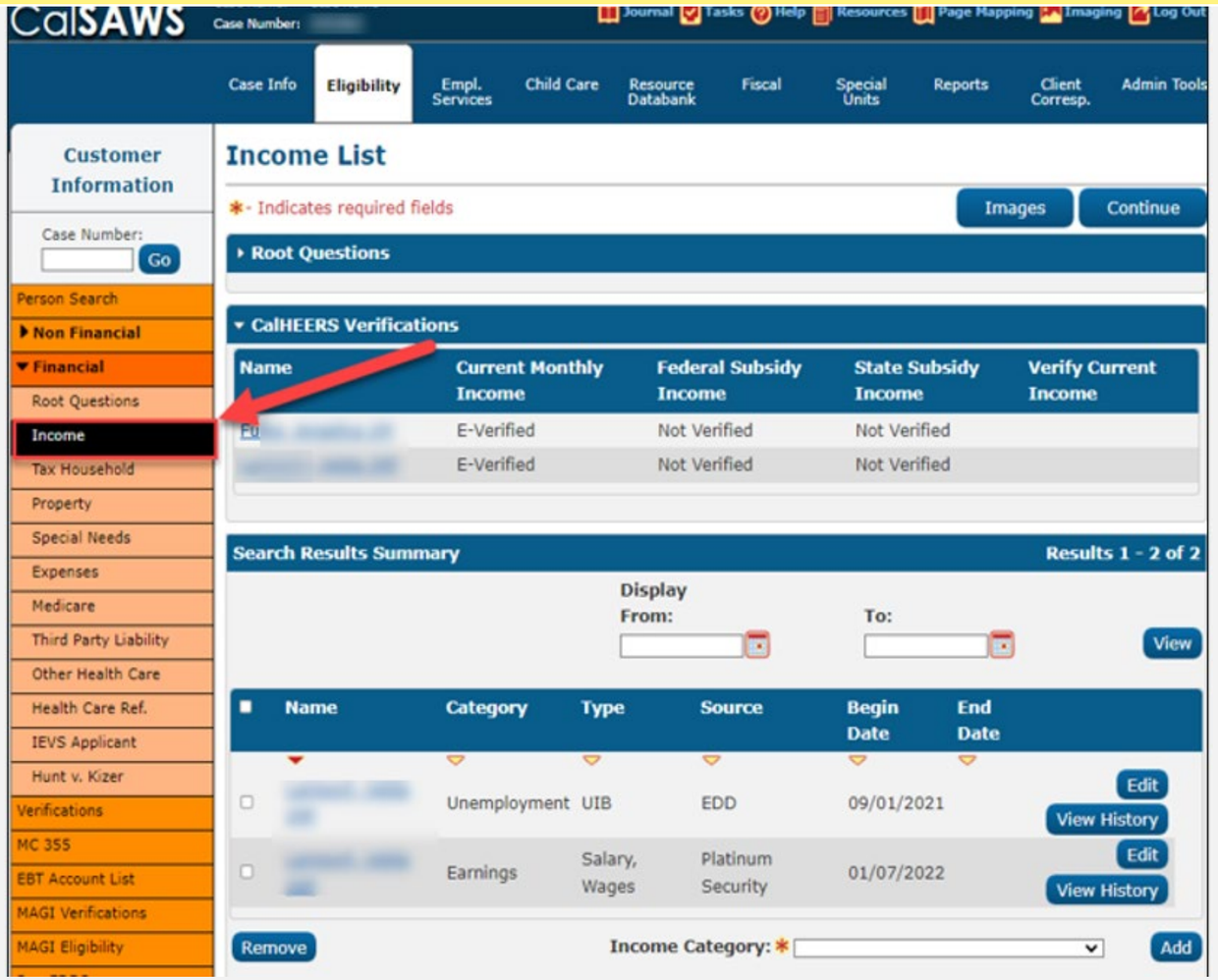
Steps to Clear Alert	Screenshot
14 Once the Medi-Cal program EDBC results have been saved, the **EDBC List** page will display the following: - A message to inform the user that a Notice of Action was created. - A **Preview NOA** button, which allows the user to view the notice prior to distribution. - 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.	

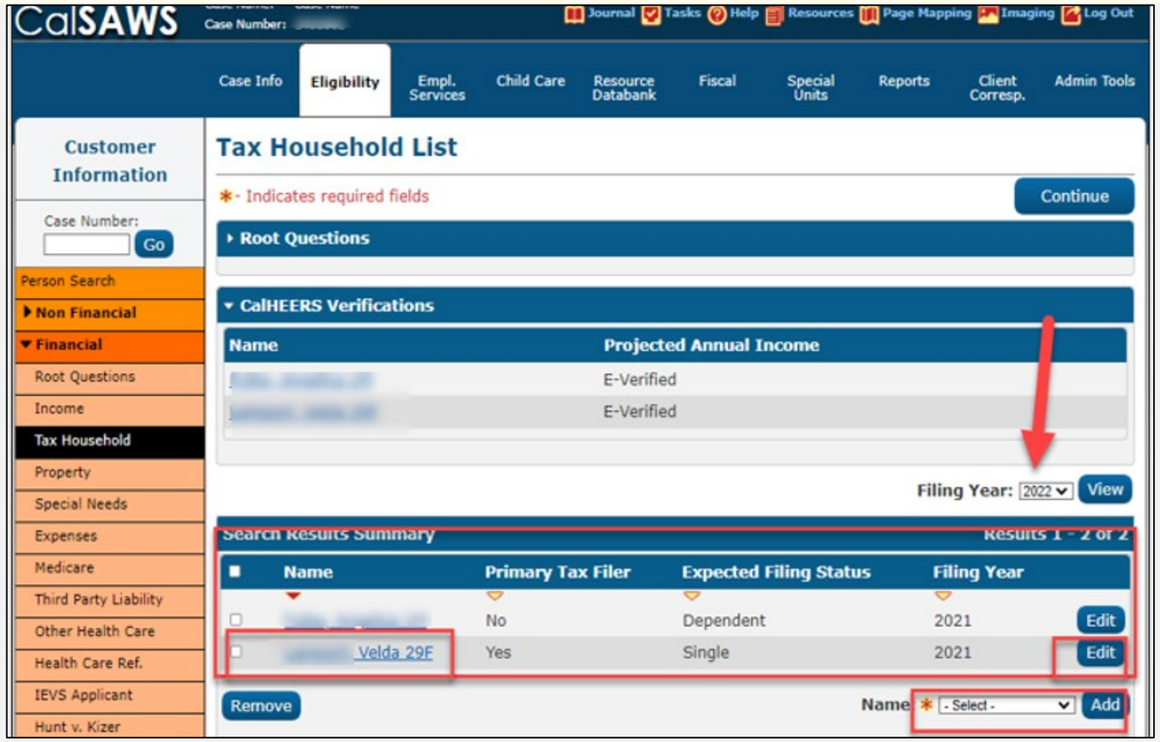
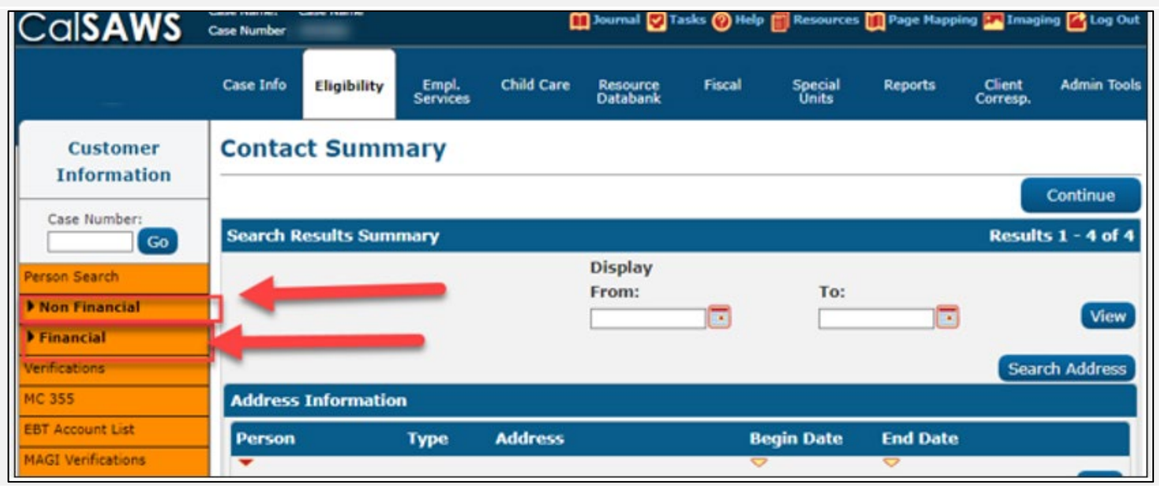
Steps to Clear Alert	Screenshot
15 In the **Distributed Documents** Search: 1. Click on the hyperlink for the NOA with the "**Pending Review**" status to view the NOA and select a method of distribution. If the NOA is not reviewed it will go out due to an overnight batch process.	

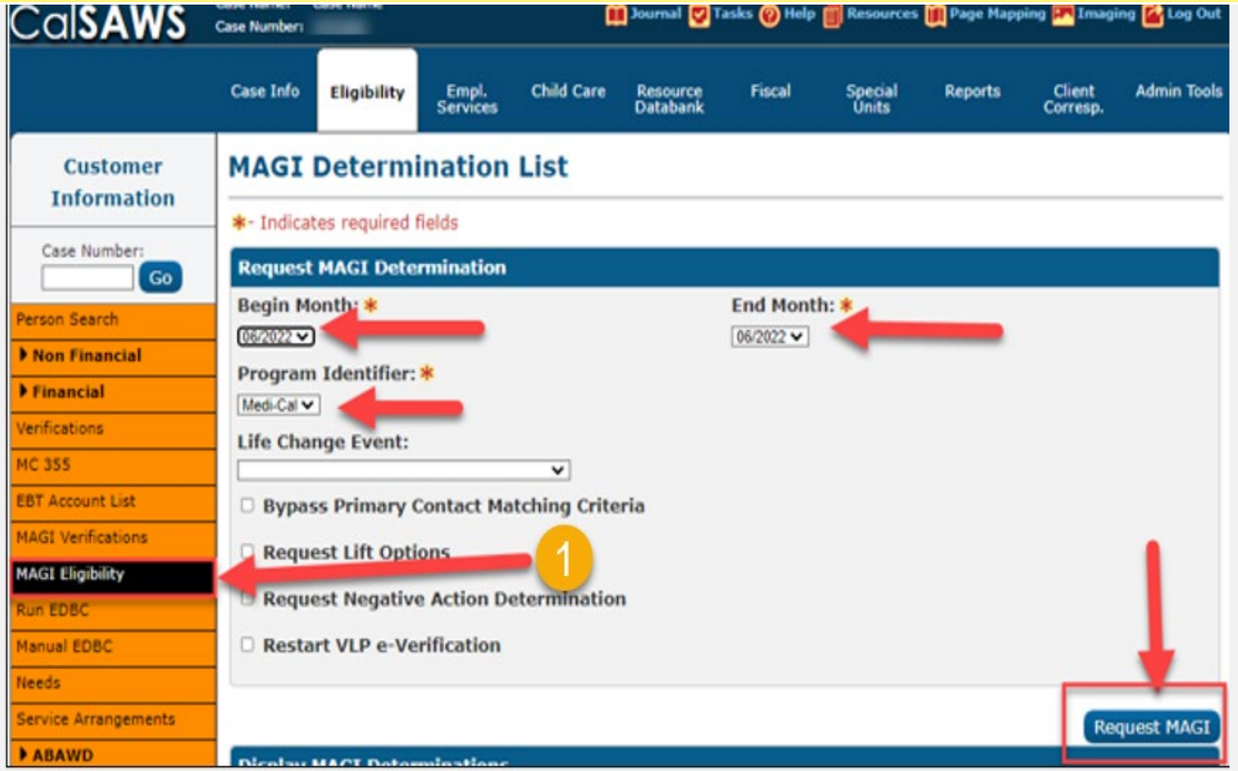
	Steps to Clear Alert	Screenshot
16	Users will be directed to a PDF preview of the NOA. Users will have the following options: - **Append:** User can make limited edits to NOA if necessary - **Save and Print Locally:** User will save NOA to the case and will need to manually print the NOA for distribution. - **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. Select the appropriate status for the NOA. This will update the status in the **Distributed Document Search** page.	
17	This case review is complete. Document all actions taken per county policy, including journal entries, and the sending out any applicable Notices of Action. The Yellow Banner will no longer appear on the case. **Do not proceed to Step 18.**	

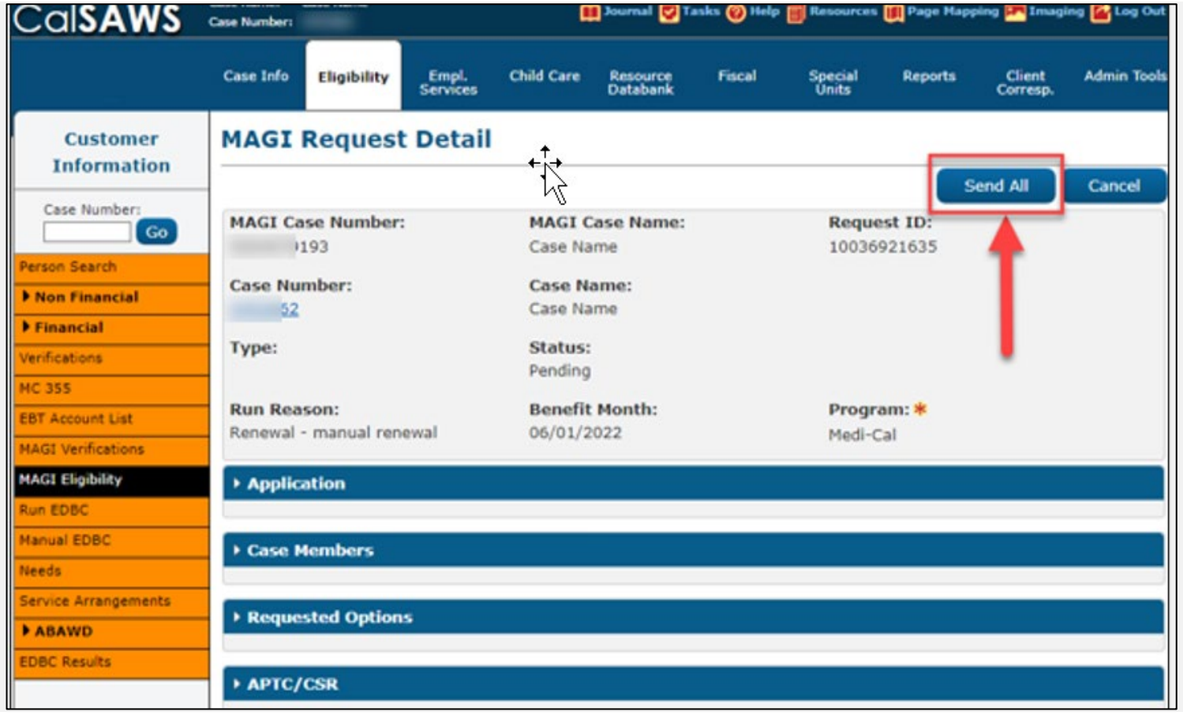
	Steps to Clear Alert	Screenshot
18	The **MAGI Referral Detail** on Step 5 is showing that there are individual(s) with a **Pending Eligible** status coming from CalHEERs. Eligibility for the individual(s) must be reviewed and redetermined to remove the Yellow Banner. Review the following pages for any pending information: - **Verifications** (Step 19) - **Income** (Step 20) - **Tax Household** (Step 21) - **Customer Information** - **Non-Financial and Financial Data Collection pages** (Step 22) Once a full case review is complete, go to step 23. Additional Job Aids are available in CalSAWS in the **Help Icon** located in the Utilities navigator: **JA EDBC – Troubleshooting Incorrect Results** **JA Medi-Cal – MAGI Referrals and Eligibility Determinations**	

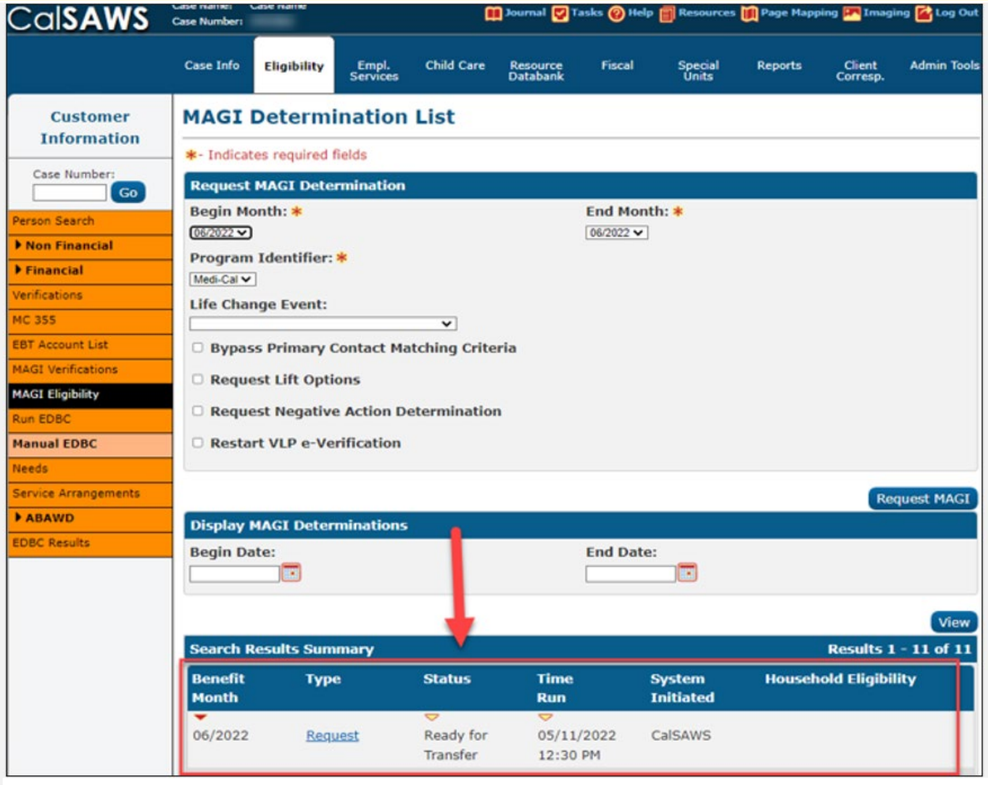
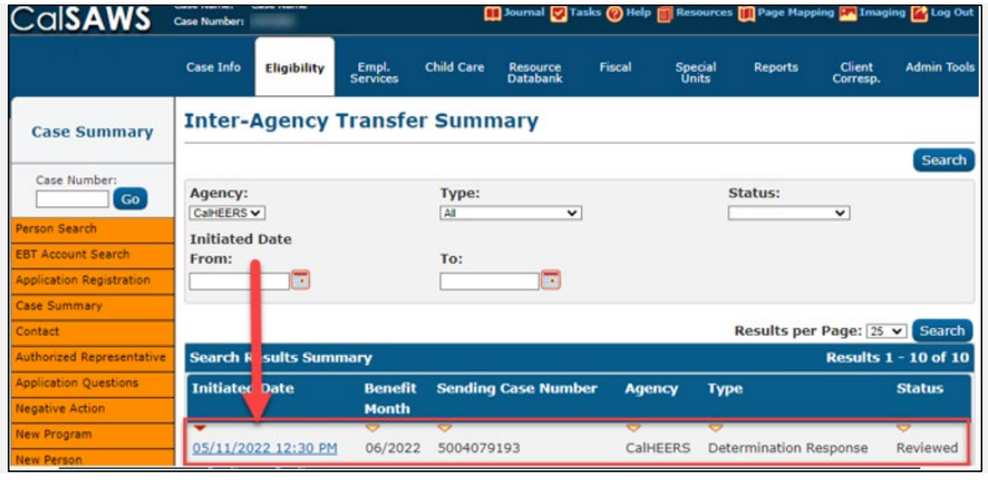
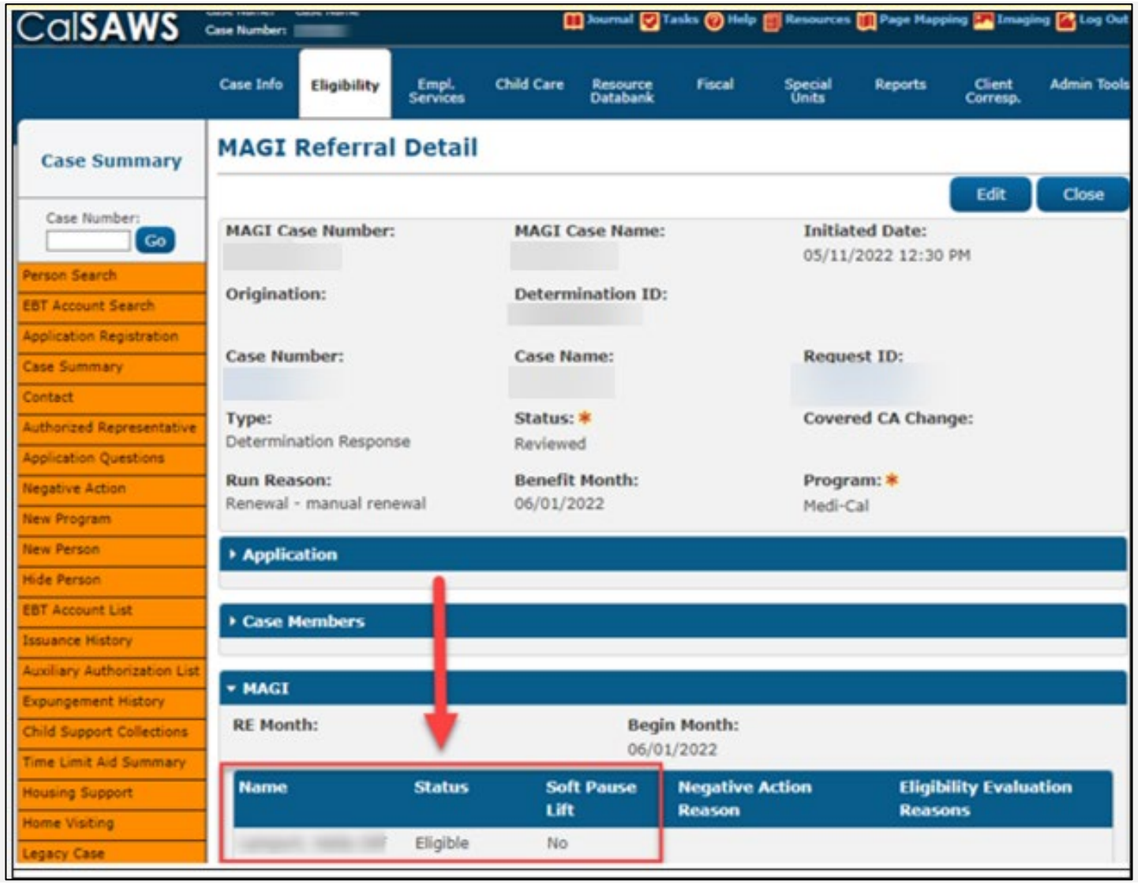
Steps to Clear Alert	Screenshot
19 **Verifications List Page** Users can review pending verifications/information and take appropriate case action, following program regulation. To identify any pending verifications that are applicable in making a benefit determination for individual(s), users will navigate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

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**	

	Steps to Clear Alert	Screenshot
21	**Tax Household** 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.	
22	**Non-Financial and Financial** The user should conduct a review of all other applicable data collections pages in both the Non-Financial and Financial pages in CalSAWS.	

Steps to Clear Alert	Screenshot
23 Once a full case review is complete, Users can request a MAGI Determination. 1. Click on **MAGI Eligibility** in the **Task** navigator. Users will be directed to the **MAGI Determination List** page. ⚠ The user will need to ensure the following information is accurate prior to making the request: - Begin/End Month - Program Identifier - Life Change Event (if applicable) Once information is verified, Users can click the **Request MAGI** button. This will direct Users to the **MAGI Request Detail** page.	

Steps to Clear Alert	Screenshot
24 The **MAGI Referral Detail** page will display the following information that CalSAWS will transmit to CalHEERs: - 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 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.	

	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		Screenshot
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.