



CalSAWS | Medi-Cal CalHEERS Case Linkage/Unlink

Fact Sheet

Purpose: The purpose of this Fact Sheet is to provide step-by-step instructions on how to link and unlink a CalHEERS case to a CalSAWS case.

CalSAWS has the functionality to search for MAGI cases, applications, and person information known to CalHEERS. If found, that information will be returned to CalSAWS. The following steps will instruct you how to link a CalHEERS case to a CalSAWS case.

What You Should Do:

- 1) Within the context of your case, navigate to the local navigation bar and click the **MAGI Case Search**.

The screenshot displays the 'Case Summary' page in CalSAWS. On the left is a navigation menu with options like 'Person Search', 'EBT Account Search', 'Application Registration', 'Case Summary' (selected), 'Contact', 'Authorized Representative', 'Application Questions', 'Negative Action', 'New Program', 'New Person', 'Hide Person', 'EBT Account List', 'Issuance History', 'Auxiliary Authorization Link', 'Expungement History', 'Child Support Collections', 'Time Limit Aid Summary', 'Case Flag', 'Legacy Case', 'Confidentiality', 'ICT Summary', 'IAT Summary', 'MAGI Case Search', 'Customer Contact History', 'SB 87', 'Invoice History', 'Linkages', 'General Ledger', and 'Reporting History'. The main content area shows case details for 'Heath Weaver' in 'Los Angeles' County. It includes a 'Companion Cases' section with an 'Add' button, a 'Display' section with a date filter and 'View' button, and a 'Medi-Cal' section. The 'Medi-Cal' section lists 'Worker: Tom Dickey', 'Worker ID: 19LS000100', 'Program Status: Pending', 'Primary Applicant/Recipient: David, Hannah 40M', 'Language: English', 'Phone Number:', 'Email:', and 'Application Date: 12/22/2022'. Below this is a table for 'All People Associated with the Case' with columns: Name, DOB, Age, Gender, SSN, CIN, Person #, and Household Status. The table contains one entry: 'Hannah David' with DOB 05/20/1982, Age 40, Gender M, SSN 787-88-9033, CIN 35460775A, Person # 01, and Household Status. At the bottom, a status bar indicates 'This page took 3.38 seconds to load.' and an 'Images' button is visible.

- 2) On the MAGI Case Search screen, choose the search parameters from the drop list. Choose the benefit month and fill in the remaining fields and click search.

NOTE: 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.



MAGI Case Search

Indicates required fields

Case Number: [Go](#)

Search By: Benefit Month:

MAGI Case Number:

[Search](#)

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3) Click the **MAGI Case Number** hyperlink on the MAGI Case Search screen

MAGI Case Search

Indicates required fields

Refine Your Search

Search Results Summary

MAGI Case Number	MAGI Case Status	SAWS Case Number	SAWS Case County
5000013855	Active	L000004	Placer

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4) If the MAGI Case Members are correct, click **Link to Case**

MAGI Search Response Case Detail

[Link to Case](#) [Close](#)

MAGI Case Number: 5000013855 MAGI Case Status: Active Initiated Date: 12/22/2022 03:44:18 PM

MAGI Application Number: 1000014547 MAGI Application Status: Completed County of Responsibility: Placer

Actively Linked SAWS Case Number: L000004 Active SAWS Case County: Placer

Last Associated SAWS Case Number: Last Associated SAWS County:

MAGI Case Members

Name	DOB	SSN	CIN
David, Hannah 40	05/20/1982	787-88-9033	31460775A

[Link to Case](#) [Close](#)

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5) On the MAGI Determination List, click the **Request MAGI** button

MAGI Determination List

★ - Indicates required fields

Request MAGI Determination

Begin Month: ★
02/2023

End Month: ★
02/2023

Program Identifier: ★
Medi-Cal

Request Case Linkage Update:
5000013855 [Cancel](#)

Life Change Event:

[Request MAGI](#)

Display MAGI Determinations

Begin Date:

End Date:

[View](#)

Search Results Summary Results 1 - 1 of 1

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
02/2023	Request	Error	12/22/2022 3:40 PM	CalSAWS	

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6) On the MAGI Request Detail page, click **Confirm Associations**

MAGI Request Detail

[Confirm Associations](#)
[Cancel](#)

MAGI Case Number: 5000013855

MAGI Case Name:

Request ID: 10019935404

Case Number: [L2261ES](#)

Case Name: Heath Weaver

Request Case Linkage Update: Yes

Type: Pending

Status: Pending

Run Reason: Continuing

Benefit Month: 02/01/2023

Program: ★ Medi-Cal

Application

Application Date: 12/22/2022

Primary Applicant/Recipient: Hannah David

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 12/22/2022

Case Members

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
Hannah David	01	05/20/1982	787-88-9033	35460775A	

Requested Options

7) On the Person Association List, click **View Details**

Person Association List

[Confirm](#)

MAGI Case Number: 5000013855

Persons included in the Request

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN
David, Hannah	01		

[View Details](#)

[Confirm](#)

This Type 1 page took 2.81 seconds to load.



8) On the Person Association Detail page, click **Edit**

The screenshot shows the 'Person Association Detail' page. At the top right, there are 'Edit' and 'Close' buttons. Below the title, the 'MAGI Case Number' is 5000013855. A table lists associations for 'CalSAWS' and 'CalHEERS'. The 'CalHEERS' row is bolded. At the bottom right, there are 'Edit' and 'Close' buttons. A status bar at the bottom indicates 'This page took 2.08 seconds to load.'

Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	David, Hannah	05/20/1982	787-88-9033	35460775A
CalHEERS					

9) On the Person Association Detail page, click the **Select** button next to the bolded CalHEERS

The screenshot shows the 'Person Association Detail' page. At the top right, there are 'Save and Return' and 'Cancel' buttons. Below the title, the 'MAGI Case Number' is 5000013855. A table lists associations for 'CalSAWS' and 'CalHEERS'. The 'CalHEERS' row is bolded and has a 'Select' button next to its 'Person Number'. At the bottom right, there are 'Save and Return' and 'Cancel' buttons. A status bar at the bottom indicates 'This page took 2.04 seconds to load.'

Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	David, Hannah	05/20/1982	787-88-9033	35460775A
CalHEERS					

10) On the Select CalHEERS Person Number, click the dot next to the CalHEERS PN and click **Select**

The screenshot shows the 'Select CalHEERS Person Number' page. At the top right, there are 'Select' and 'Cancel' buttons. Below the title, a legend indicates that a red asterisk (*) indicates required fields. The 'CalSAWS Case Person' section shows fields for First Name (Hannah), Middle Name, Last Name (David), DOB (05/20/1982), SSN (787-88-9033), and CIN (35460775A). The 'CalHEERS Person Numbers available for selection' section has a table with columns: CalHEERS PN, Name, DOB, SSN, and CIN. The first row shows '01' for CalHEERS PN, 'David, Hannah' for Name, '05/20/1982' for DOB, '787-88-9033' for SSN, and '31460775A' for CIN. There is a radio button next to the '01' in the CalHEERS PN column. At the bottom right, there are 'Select' and 'Cancel' buttons.

CalHEERS PN	Name	DOB	SSN	CIN
<input checked="" type="radio"/> 01	David, Hannah	05/20/1982	787-88-9033	31460775A



- 11) On the Person Association Detail page, make sure that the CalSAWS person number matches the CalHEERS person number and click **save and return**

Person Association Detail

Save and Return Cancel

MAGI Case Number:
5000013855

Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	David, Hannah	05/20/1982	787-88-9033	35460775A
CalHEERS	01 Remove	David, Hannah	05/20/1982	787-88-9033	31460775A

Save and Return Cancel

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- 12) On the Person Association List, click **Close**

Person Association List

Close

MAGI Case Number:
5000013855

▼ Persons included in the Request

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN
David, Hannah	01	David, Hannah	01

[View Details](#)

Close

- 11) On the MAGI Request Detail page, click **Send All**. NOTE: CalSAWS will run come-up month first

MAGI Request Detail

Send All Cancel

MAGI Case Number: 5000013855
Case Number: [L2261E3](#)
Type: Pending
Run Reason: Continuing

MAGI Case Name: Health Weaver
Status: Pending
Benefit Month: 02/01/2023

Request ID: 10019935404
Request Case Linkage Update: Yes
Program: Medi-Cal

▼ Application

Application Date: 12/22/2022
Life Change Event: 5
Maintain Verifications: Signed on 12/22/2022

Primary Applicant/Recipient: Hannah David
Life Change Event Date: Yes
Consent for Verifications: Yes

Application Source: SAWS
Requested Retro: No
R&R Agreed: Yes

▼ Case Members

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
Hannah David	01	05/20/1982	787-88-9033	35460775A	

[View Associations](#)

▼ Requested Options

▼ APTC/CSR

Begin Month: 02/01/2023
CSR: No

Name Status



MAGI Determination List

* - Indicates required fields

Request MAGI Determination

Begin Month: *
 End Month: *

Program Identifier: *

Life Change Event:

☐ Bypass Primary Contact Matching Criteria
☐ Request Lift Options
☐ Request Negative Action Determination
☐ Restart VLP e-Verification

Request MAGI

Display MAGI Determinations

Begin Date:
 End Date:

View

Search Results Summary

Results 1 - 2 of 2

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
02/2023	Determination	Reviewed	12/22/2022 3:45 PM	CalSAWS	Eligible
02/2023	Request	Error	12/22/2022 3:40 PM	CalSAWS	

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Note: If a worker has linked a CalHEERS case number to an incorrect CalSAWS case number, you will need to repeat steps 1-11 to link the CalHEERS case number to the correct CalSAWS case number.