

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:

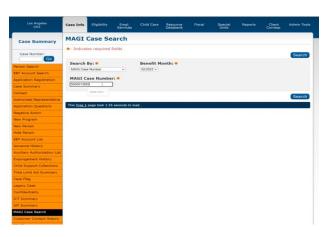
1) Within the context of your case, navigate to the local navigation bar and click the **MAGI Case** Search.

Case Summary	Case Summ	ary							
					8	Imag	jes C	apture	Generate Coversheet
Case Number:									
Go	Case Name					County			
Person Search	Heath Weaver					Los Ang	eles		
EBT Account Search									
Application Registration	- Companion Ca	ses							
Case Summary	Case Number					ase Na	me		
Contact	Case manufer								Add
Authorized Representative									
Application Questions	P1 - 1								
Vegative Action	Display:	View							
New Program	vev nev23	THEIR							
New Person									
Hide Person	- Medi-Cal								
EBT Account List	Worker:		То	m Dickey		Primar	y Applican	t/Recipient:	David, Hannah 40M
Issuance History	Worker ID:		19	15001300		Langu	age:		English
Auxiliary Authorization List	Program Stat		De	nding		Phone	Number		
Expungement History	Program Stat			andaning		Email:	realizer.		
Child Support Collections									
Time Limit Aid Summary						Applica	ation Date:		12/22/2022
Case Flag	Name		Request	ed Medi-	Cal Type	Role	Role Reas	on Status	Status Reason
egacy Case	David, Hanna	ah 40M	Medi-Cal			MEM		Pendin	9
Confidentiality									View Details
ICT Summary									
IAT Summary	All People Assoc	iated with	the Cas	•					
MAGI Case Search		DOB	Age	Gender	SSN	6	IN	Person #	Household Status
Customer Contact History		05/20/1982		M	787-88-90		5460775A		nousenoid Status
58 87	mannari David	05/20/1982	2 40	M	/8/-88-90	33 3	5400775A	01	
Invoice History									Images
inkages									Images
ieneral Ledger	This Type 1 page took	3.38 seconds	to load.						

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.





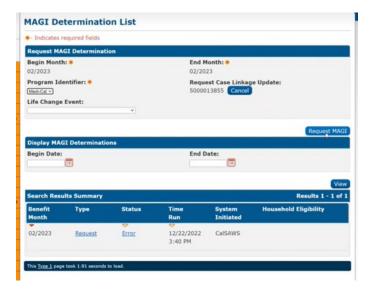
3) Click the MAGI Case Number hyperlink on the MAGI Case Search screen

Los Angeles CH3	Case Info	Eligibility	Empl. Services	Child Care	Resource Detabank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Case Summary	MAGI	Case Se	arch							
Case Number:		tes required f our Search	fields							
Person Search	Search R	tesults Sum	mary							
EBT Account Search	MAGI C	ase Number	м	AGI Case St	atus	SAWS Cas	e Number	SAW	S Case Cou	unty
Application Registration	5000013	855	Ac	tive		L000004		Place	r	
Contact										
Authorized Representative	This Tupe 1	page took 1.97	seconds to k	and .						
Application Questions	THE LINE A	page 6004 1.97	accounts to it					5		
Negative Action										
Nov. Designer										

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



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



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

				Confir	m Associations Cancel	
MAGI Case Numb 5000013855	er:	MAGI Case M	lame:	Request I 100199354		
Case Number:		Case Name: Heath Weaver		Request 0 Yes	Case Linkage Update:	
Type:		Status: Pending				
Run Reason: Continuing		Benefit Mont	th:	Program: * Medi-Cal		
		02/01/2023				
 Application 						
Application Date: 12/22/2022		Primary App Hannah Davi	olicant/Recipient:	Application Source: SAWS		
Life Change Eve	nt:	Life Change Event Date:		Requested Retro: No		
Maintain Verifica	ations:		Verifications:	R&R Agreed:		
5		Yes		Yes		
Signed Status/D Signed on 12/22/						
- Case Members						
Name	MEDS PN	DOB	SSN	CIN	Non-Compliance	
Hannah David	01	05/20/1982	787-88-9033	35460775A		

7) On the Person Association List, click View Details

AGI Case Number:				
5000013855				
Persons included in	the Request			
CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN	- 02 - 12 - 12 - 12
David, Hannah	01			View Details
				Confirm

8) On the Person Association Detail page, click Edit

					Edit Close
MAGI Case	Number:				
5000013855					
Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	David, Hannah	05/20/1982	787-88-9033	35460775A
CalHEERS					
					Edit Close

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

				Save and Re	turn Cancel
MAGI Case N 5000013855	lumber:				
Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	David, Hannah	05/20/1982	787-88-9033	35460775A
CalHEERS	Select				
				-	
				Save and Re	turn Cance

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

t- In	dicates required fields	5		-	Select Cancel
CalS	AWS Case Person				
First	Name:		Middle Name:	La	st Name:
Hann	ah			Da	vid
DOB			SSN:	CI	N:
05/2	0/1982		787-88-9033	35	460775A
CalH	EERS Person Numb	ers available for selec	tion DOB	SSN	CIN
•	01	David, Hannah	05/20/1982	787-88-9033	31460775A
0					

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

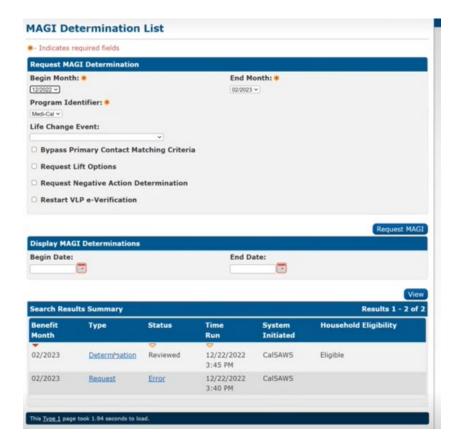
				Save and Ret	arn Cancel
MAGI Case M	Number:				
5000013855					
Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	David, Hannah	05/20/1982	787-88-9033	35460775A
CalHEERS	01 Remove	David, Hannah	05/20/1982	787-88-9033	31460775A
				Save and Ret	urn Cancel

12) On the Person Association List, click Close

AGI Case Number:				Close
000013855				
Persons included in	the Request			
 Persons included in CalSAWS Person 	the Request MEDS PN	CalHEERS Person	CalHEERS PN	
		CalHEERS Person David, Hannah	CalHEERS PN 01	View Details

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

					Send All Cancel	
MAGI Case Numb 5000013855	er:	MAGI Case N	lame:	Request ID 1001993540		
Case Number:		Case Name: Heath Weaver		Request Ca Yes	se Linkage Update:	
Гуре:		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 Yes	Verifications:	R&R Agreed: Yes		
Signed Status/D Signed on 12/22/2						
- Case Members						
Name	MEDS PN	DOB	SSN	CIN	Non-Compliance	
Hannah David	01	05/20/1982	787-88-9033	35460775A		
View Associati	ons					
Requested Opt	ions					
- APTC/CSR						
Begin Month: 02/01/2023				CSR No		
02/01/2023						



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.