



# CalSAWS | Understanding When an Individual is Included in an EDR

## Fact Sheet

### Purpose

An Eligibility Determination Request (EDR) is used to transmit information from CalSAWS to CalHEERS. This Fact Sheet explains when the System will include someone in an EDR, when an individual's Applying for Aid indicator is set to 'Yes' or 'No', and when a Negative Action will be populated.

### What Should You do?

#### Find and review your application

1. The System will determine if an individual is included in the EDR using the below criteria.

Are they Hidden or Duplicate?	Has Tax HH Record*	Do they have an Open MC Application?***	Are they the Primary Applicant on the Medi-Cal program?	Are they a MC Program Person?	Are they Deceased in the Calendar year prior to the EDR Benefit month?	Customer Option: "Health Coverage by Covered California?" in the EDR benefit month	Do they have a prior DER with Applying for Aid = Y?***	Include the Person in the EDR
Yes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	No
No	Yes	N/A	N/A	N/A	N/A	N/A	N/A	Yes
No	N/A	Yes	N/A	N/A	N/A	N/A	N/A	Yes
No	N/A	N/A	Yes	N/A	N/A	N/A	N/A	Yes
No	No	No	No	No	N/A	N/A	N/A	No
No	No	No	No	Yes	Yes	N/A	N/A	No
No	No	No	No	Yes	No	Answered "Yes"	N/A	Yes
No	No	No	No	Yes	No	Not entered	Yes	Yes
No	No	No	No	Yes	No	Not entered	No	No
No	No	No	No	Yes	No	Answered "No"	N/A	No



2. For Individuals included in the EDR, the System will determine the "Applying for Health Coverage Indicator" value using the below criteria.

Do they have an Open MC Application?*	Person Role Code	Person Role Reason	Customer Option: "Health Coverage by Covered California?" in the EDR benefit month	Do they have a prior MAGI link?	Customer Option: "MC Declined Eligible" in the EDR benefit month	Set the "Applying for Health Coverage Indicator" to:
Yes	UP	Gets CW, Gets FC, etc.	N/A	N/A	N/A	<b>No</b>
Yes	All Other Person Role Codes	All Other Person Role Reasons	N/A	N/A	No	<b>Yes</b>
Yes	N/A	N/A	N/A	N/A	Yes	<b>No</b>
No	N/A	N/A	Answered "Yes"	N/A	N/A	<b>Yes</b>
No	N/A	N/A	Not entered	Yes	N/A	<b>Yes</b>
No	N/A	N/A	Not entered	No	N/A	<b>No</b>
No	N/A	N/A	Answered "No"	N/A	N/A	<b>No</b>



3. For Individuals included in the EDR, the System will determine if Negative Action is automatically sent in EDR for the individual.

EDR is a Negative Action request	Do they have an Open MC Application?*	Person has a Negative Action Reason in the last applicable EDR	Negative Action Reason for the individual:
Yes	N/A	N/A	<b>Populated</b>
Yes	Yes	N/A	<b>Not Populated</b>
No	No	Yes	<b>Populated</b>
No	No	No	<b>Not Populated</b>

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**\*Has Tax HH Record:** Individual has a Tax Household record effective for the EDR Benefit Month.

Please note: CalSAWS logic does not require a Tax Household record for each calendar year. If there are no Tax HH records for the case member(s) in the EDR Benefit Year, CalSAWS will check the prior calendar year for at least one Tax HH record. If none are found, CalSAWS will repeat each year until at least one Tax HH record is found. If at least one Tax HH record is found, that year's Tax HH records for all case member(s) will be considered for the EDR Benefit Month.

**\*\*Do they have an Open MC Application?** Program persons with Pending, Active MEM or Ineligible MEM status have open MC Applications.

**\*\*\*Do they have a prior DER with Applying for Aid = Y?** If the individual is included in the latest DER and they had Applying for Health Coverage = Y in the DER. The "latest DER" is the last DER with a Benefit month equal to or less than the EDR Benefit month.