MAGI Determination Pending

Priority Level: 3

Programs Impacted: Medi-Cal

Background:

During the conversion cutover from CalWIN to CalSAWS, the system will run a Batch Eligibility Determination and Benefit Calculation (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 the Batch EDBC is saved.

If the CalSAWS Batch EDBC does not match the last saved CalWIN EDBC result, the system considers the benefits a **mismatch**, the case is flagged with a Yellow Banner, and the Batch EDBC is not saved.

Regardless of the Batch EDBC run results, CalWIN Benefits will continue to roll forward uninterrupted until the next EDBC is saved and accepted in CalSAWS.

In addition to an EDBC Mismatch, a case with an active Medi-Cal program will be flagged with a Yellow Banner if the last CalWIN MAGI Determination Eligibility Response (DER) resulted in a Status of "Pending Eligible" for an applicant/beneficiary, which would cause the Batch EDBC run to provide a program Status Reason of "MAGI Determination Pending."

To access a DER, users may navigate to the IAT Summary page, click the Initiated Date hyperlink for the last DER prior to conversion cutover, and review beneficiary Status on the MAGI Referral Detail page. Alternatively, users may navigate to the Batch EDBC run in the EDBC List page, click the hyperlink for the affected Medi-Cal program to navigate to the EDBC Summary page, and click the hyperlink for the Eligible Budget under the Medi-Cal Summary to review the results of the DER on the MAGI Determination Summary page, including the applicant/beneficiary Status that influenced that EDBC. Either of these pages will display a "Pending Eligible" status for impacted Medi-Cal programs.

In CalSAWS, the Batch EDBC run process will designate a Medi-Cal program as **Closed** if the program does not otherwise qualify to remain open and at least one applicant/beneficiary has a Status of "Pending Eligible" on the associated MAGI DER.

If an applicant/beneficiary's Status is "Pending Eligible" in the corresponding MAGI DER and is identical in both CalWIN and CalSAWS, users will be required to review the data collection pages for accuracy and completeness, in addition to the Batch EDBC results to identify why that status may have been awarded before making an eligibility determination (e.g., missing income verifications).

These cases are 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	SSA_INCOME	SSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	Medi-Cal	MAGI Determination Pending	11/30/2022	MAGI Determination Pending	3		

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: The user will need to conduct a case review for this Medi-Cal Program with a Yellow Banner. This includes a review the DER/CalHEERS Referral, located on the IAT Summary page, and comparing it to the EDBC results converted over from CalWIN.

If the eligibility determination matches both in the DER 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 the necessary data collection pages (e.g., Income, Tax Household, etc.). Once the required updates are made in CalSAWS, the user may proceed to run EDBC, accepting and saving the results after verifying that the determination is accurate. This action will confirm the eligibility of the individual(s) and remove the Yellow Banner.

Full Case Review – MAGI Determination Pending	
Steps to Clear Alert	**Screenshot**
1 Log in to CalSAWS by entering your Username and Password	

Steps to Clear Alert	Screenshot

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.

⭐ Note the **Yellow Banner** on the Case Summary Page

Steps to Clear Alert	Screenshot

Steps to Clear Alert	Screenshot
3 On the **Case Summary** page: 1. Click on the **IAT Summary** link on the Task Navigator. This will navigate 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 Determination Response 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)
 	
To view the determination response, 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　The user will need to review the most recent EDBC results in CalSAWS which converted from CalWIN. 1. Return to the **Case Summary** page. ⭐ Be sure to keep the original tab/window open with the Determination Response. 2. From the **Case Summary** Page, click on the **Eligibility** tab. 3. Click on **Customer Information**. This will direct you to the **Contact Summary Page**.	
7　From the **Contact Summary** page: Click on the **EDBC Results** tab. 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), and 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: 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), ensure the begin and end month are correct. 2. Click the **Run EBDC** button, selecting the **Run Reason,** if applicable. 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. Note: 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. **(Note: the EDBC results that were requested will show a run status of "Not Accepted")**	

Steps to Clear Alert	Screenshot
13 The Medi-Cal 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 navigate the user to the **EDBC List** page.	

Steps to Clear Alert	Screenshot

14   Now that 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.

EDBC List

①

Preview NOAs   Save and Continue   Cancel

- Medi-Cal NOA run is complete – NOA generated

Display by:

Program:	Type Reason:	Run Status:	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: 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.	

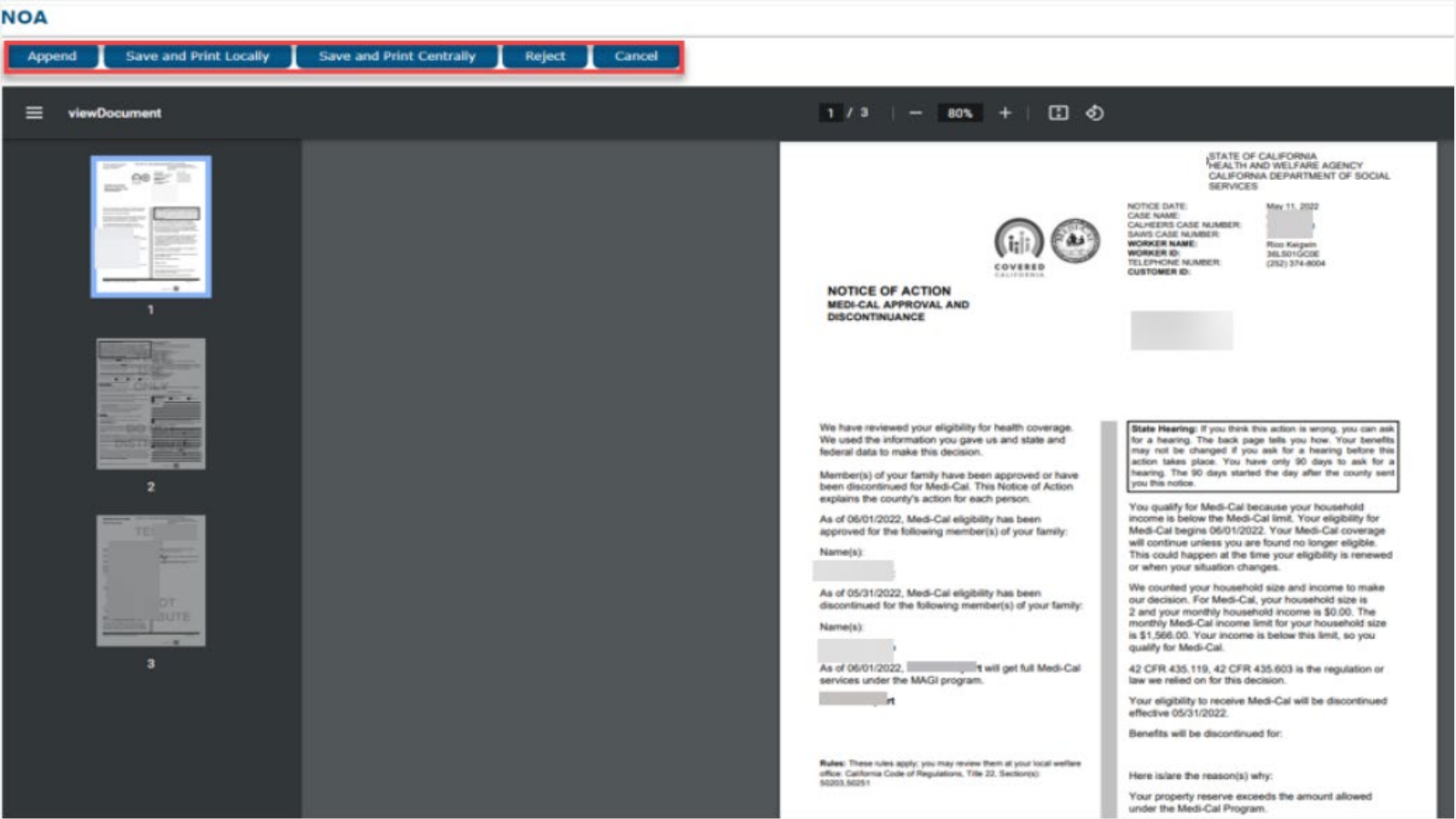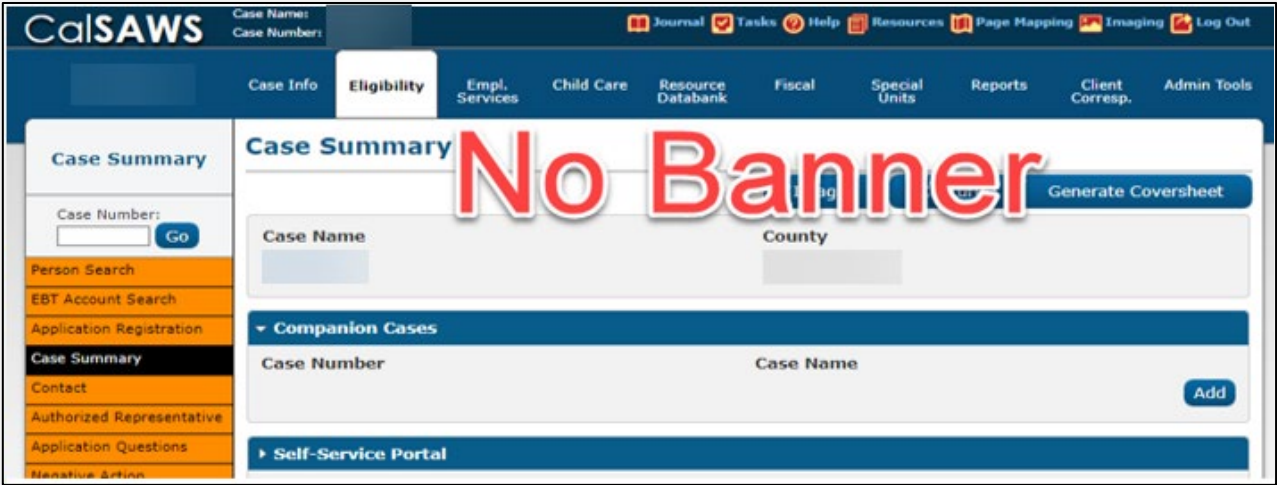| Steps to Clear Alert	Screenshot
16 The user will be directed to a PDF preview of the NOA. The user will have the following options: - **Append:** User can make limited edits to NOA if necessary - **Save and Print Locally:** User will save NOA to the case and will need to manually print the NOA for 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, ensure you document the actions taken per county policy. 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. The eligibility for the individual(s) must be reviewed and determined to remove the Yellow Banner. The suggestion would be to begin the review of the following pages: - **Verifications** (Step 19) - **Income** (Step 20) - **Tax Household** (Step 21) - **Non-Financial and Financial Data Collection pages** (Step 22) Once a full case review is complete, go to step 23.	
19 **Verifications List Page** Here, Users can identify any pending verifications that are applicable in making a benefit determination for the individual(s) with the pending eligible status. Users can review the information for this pending verification and take appropriate case action following program regulation.	

Steps to Clear Alert	Screenshot
20 Income Users 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. See the Job Aid on **Income Categories and Types in the System**, which can be found by clicking the **Help Icon** in the Utility Navigator.	
21 Tax Household The user should review the Tax Household information for accuracy on the **Tax Household List** page on the Task Navigator. The user can edit existing entries and add new entries for the necessary tax year.	

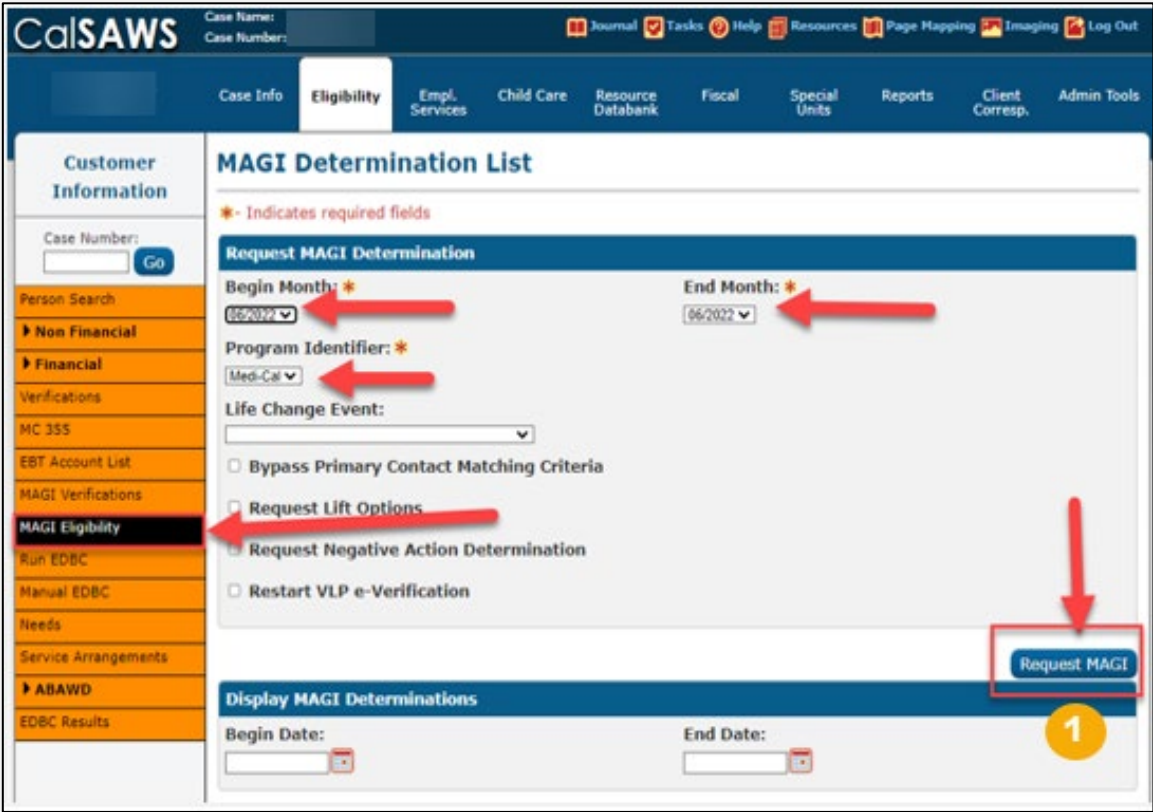| Steps to Clear Alert	Screenshot
22 **Non-Financial and Financial** The user should conduct a review of all other applicable data collections pages in both the Non-Financial and Financial pages on the Task Navigator.	

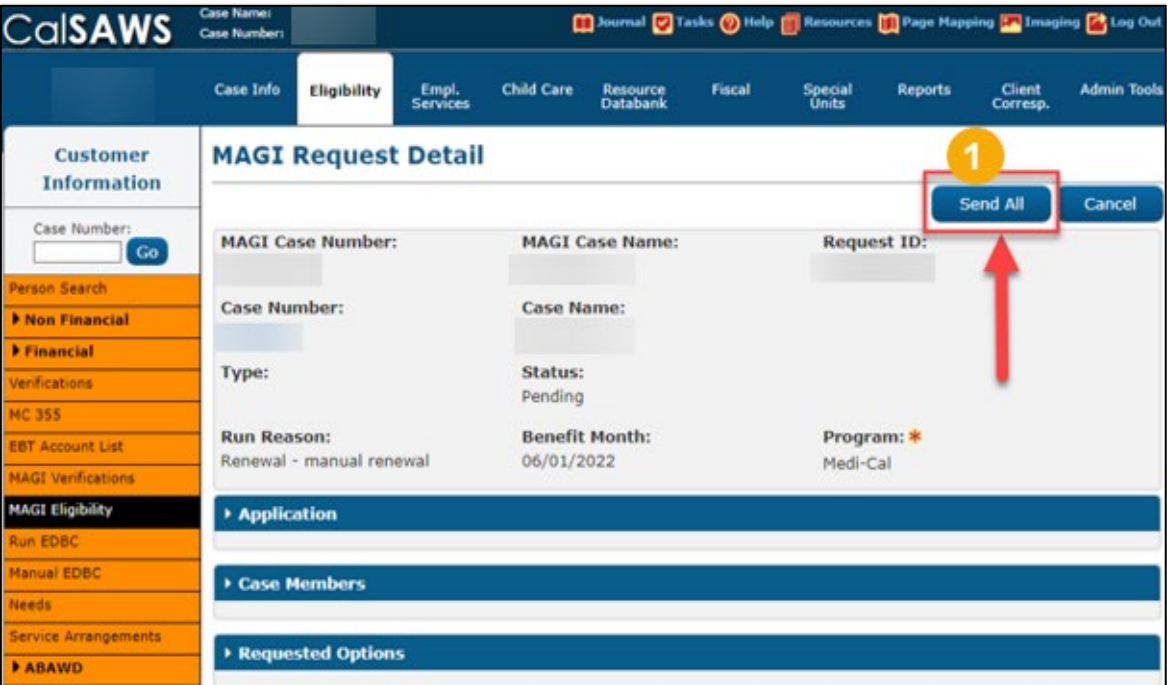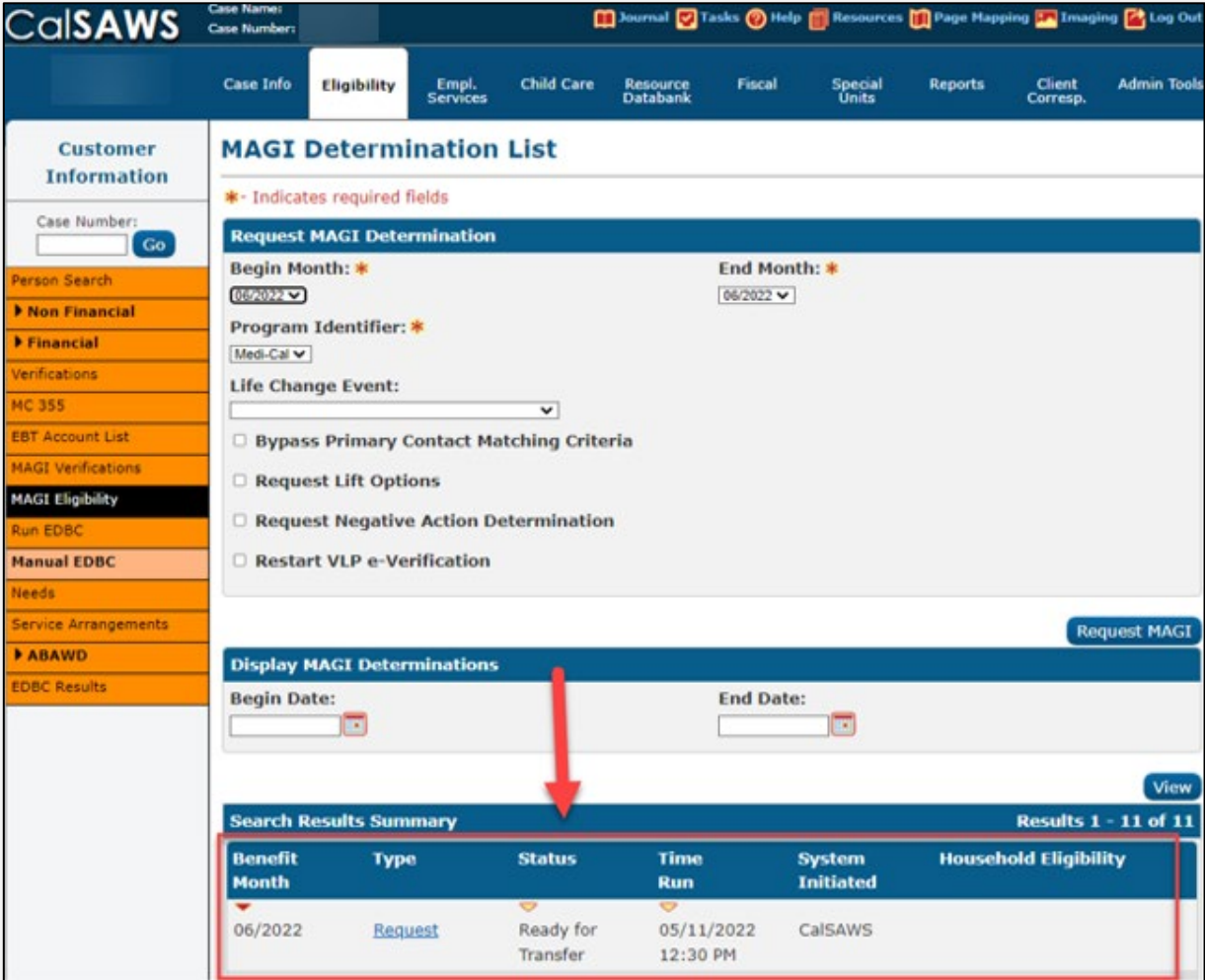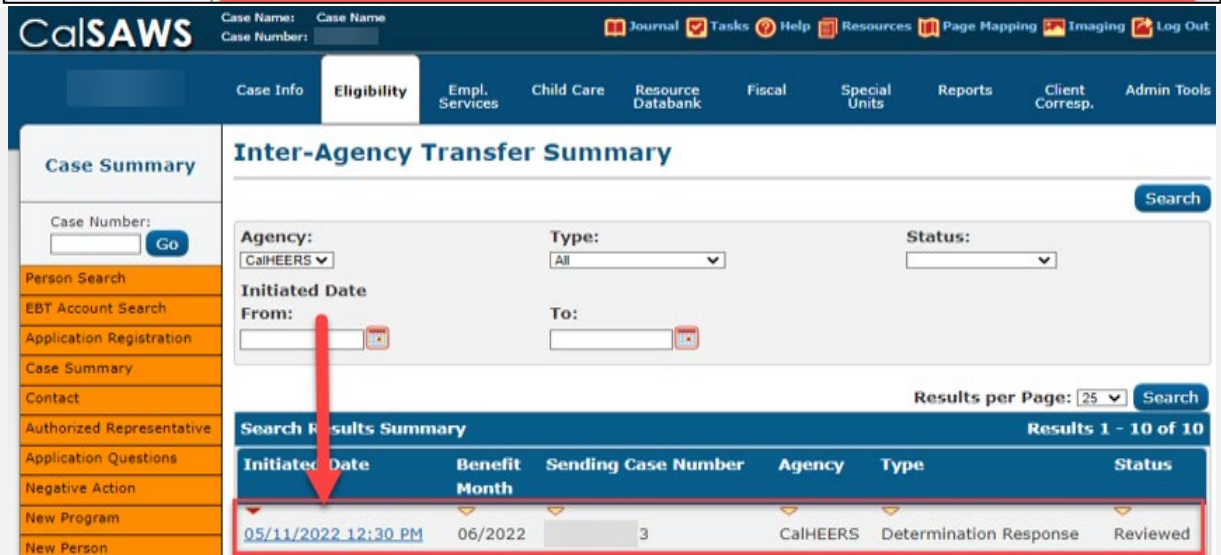| Steps to Clear Alert	Screenshot
23 Once a full case review is complete, the user is ready to request a MAGI Determination. You can click on the **MAGI Eligibility** button, which will direct the user to the **MAGI Determination List** page. The user will need to ensure the following information is accurate prior to making the request: - Begin/End Month - Program Identifier - Life Change Even (if applicable) Once this information is confirmed: Click the **Request MAGI** button. This will direct the user to the **MAGI Request Detail** page.	
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 The user can review the information, once confirmed for accuracy, the user can: Click the **Send All** button to send the request. The user will navigate 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. The user will notice that the MAGI Request is located under Search Result Summary. The user 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	