



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	XXXXXXX	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 impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all the information is entered as accurately as possible to allow for a correct determination to be made.

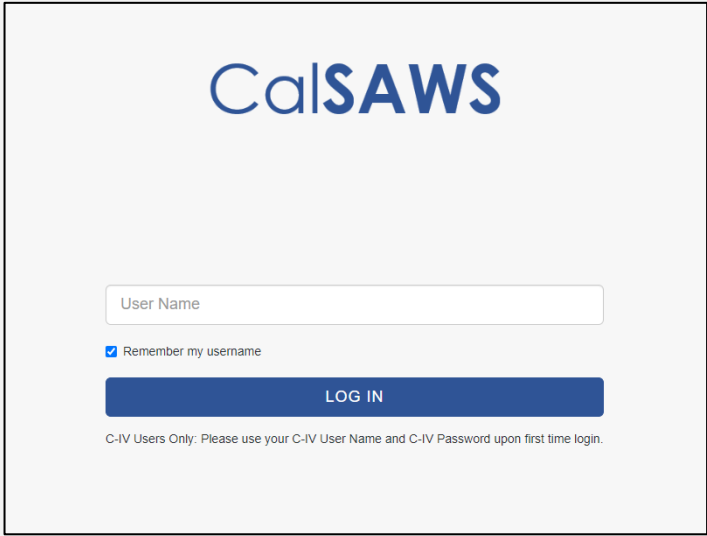



Example:

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	<div>On the Homepage: 1. Enter the case number and click on the submit button to be directed to the Case Summary page.</div> <div>★ Note - this step is not necessary if already in the Case Summary page for the desired case.</div>	



Steps to Clear Alert		Screenshot
3	<p>On the Case Summary Page:</p> <ol style="list-style-type: none">Click on the Eligibility Tab in the Navigation Bar, then click on Customer Information, then click on MAGI Eligibility.This will navigate the user to the MAGI Determination List page.	<div><p>The screenshot shows the CalSAWS Case Summary page. The 'Eligibility' tab is selected in the top navigation bar. On the left sidebar, the 'Case Summary' menu item is highlighted. The main content area shows the 'Case Summary' form with fields for Case Name, County, and Companion Cases. A yellow banner at the bottom states: 'Full Case Review is required before EDBC is run and authorized. Please refer to the Manual Case Review Guide for instructions on how to proceed. Programs Affected: Medi-Cal.'</p></div> <div><p>The screenshot shows the CalSAWS MAGI Eligibility page. The 'Eligibility' tab is selected in the top navigation bar. On the left sidebar, the 'Customer Information' menu item is highlighted. The main content area shows the 'Customer Information' form with fields for Case Name, County, and Companion Cases. A red arrow points to the 'MAGI Eligibility' menu item in the left sidebar.</p></div>



Steps to Clear Alert

4 Once directed to the **MAGI Determination List** page, the page should display the most recent CalHEERS determination which was converted from CalWIN

Note: By clicking the **VIEW** button the user can see all converted CalHEERS determinations.

- 1. Click on the most recent Determination Response, to view the determination responses, click on the **TYPE Hyperlink** reading **Determination**. This will lead you to the **MAGI Referral Summary** page.

The MAGI Referral Summary will provide an overview of the MediCal status/aid code for each applicant. To view the MAGI Determination details the user must click the desired applicant's hyperlink, which will navigate the user to the **MAGI Determination Detail** page.

Screenshot

The screenshot shows the CalSAWS 'MAGI Determination List' page. On the left is a 'Customer Information' sidebar with a search bar and a list of navigation links including 'Non Financial', 'Financial', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility' (highlighted), 'Run EDBC', 'Manual EDBC', 'Needs', 'Service Arrangements', 'ABAWD', and 'EDBC Results'. The main content area has tabs for 'Case Info', 'Eligibility' (selected), 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. Below the tabs, there's a 'Request MAGI Determination' section with fields for 'Begin Month' (06/2023), 'End Month' (08/2023), 'Program Identifier' (Medi-Cal), and 'Life Change Event'. There are checkboxes for 'Bypass Primary Contact Matching Criteria', 'Request Lift Options', 'Request Negative Action Determination', and 'Restart VLP e-Verification'. A 'Request MAGI' button is at the bottom right. Below this is a 'Display MAGI Determinations' section with 'Begin Date' and 'End Date' fields, and a 'View' button. The 'Search Results Summary' section shows 'Results 1 - 1 of 1' with a table:

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
06/2023	Determination	Complete	04/28/2023 4:25 AM	CalHEERS	Partially Eligible

A red arrow points to the 'Determination' link in the table. At the bottom, a status bar says 'This Type 1 page took 0.12 seconds to load.'

The screenshot shows the 'MAGI Determination Summary' page. It has the same sidebar and top navigation as the previous page. The main content area shows details for a specific determination: 'Request ID' (redacted), 'Benefit Month' (06/2023), 'Date Run' (04/28/2023), 'Household Eligibility' (Partially Eligible), 'Run Reason' (Change Reporting), and 'Requested by Batch' (No). Below this is a table with columns: 'Name', 'Primary Aid Code', 'Status', 'Eligibility Evaluation Reasons', 'Negative Action Reason', and 'Carry Forward Status'. The table has two rows:

[Redacted]		Ineligible	Income Limit - Not Within Range, Current Monthly Income Used		No
[Redacted]	T2	Eligible	Income Limit - Within Range, Current Monthly Income Used		No

A red arrow points to the first row. A 'Close' button is in the top right corner.



Steps to Clear Alert		Screenshot
5	<div>The MAGI Determination Detail page will display the following information sent from CalHEERs to CalSAWS:</div> <ul style="list-style-type: none">- 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	<div></div>



Steps to Clear Alert	Screenshot
<div data-bbox="205 298 1153 681"><p>6 On a separate tab or window:</p><ol style="list-style-type: none">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.</div>	<div data-bbox="1324 294 2784 919"></div>
<div data-bbox="205 943 1115 1104"><p>7 From the Contact Summary page:</p><ol style="list-style-type: none">1. Click on the EDBC Results link on the Task navigator. This will lead you to the EDBC List page.</div>	<div data-bbox="1324 939 2784 1802"></div>



Steps to Clear Alert

8

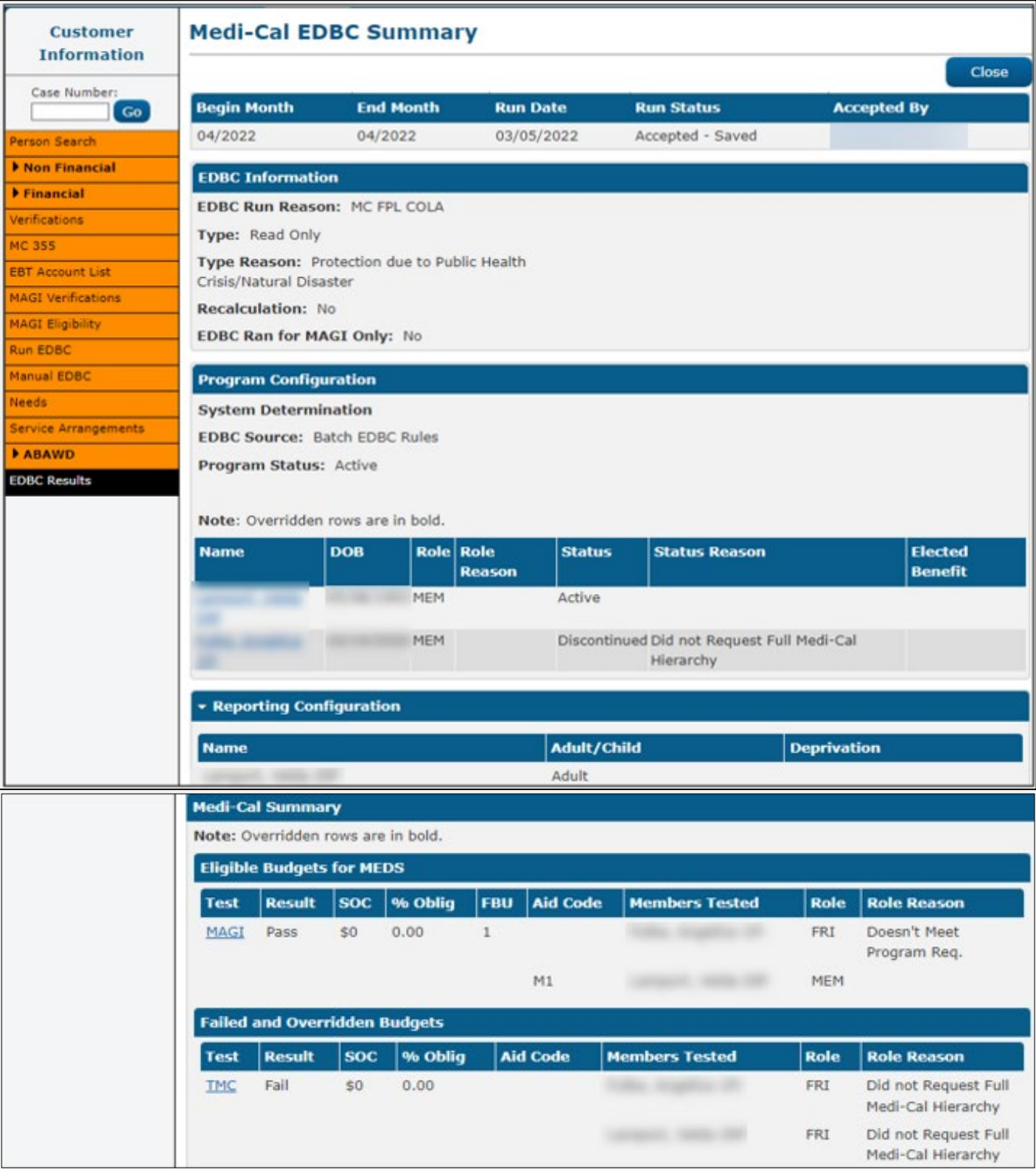
From the EDBC List page:

1. Select the most recent EDBC hyperlink for the Medi-Cal program. This will navigate the user to the **Medi-Cal EDBC Summary** page.


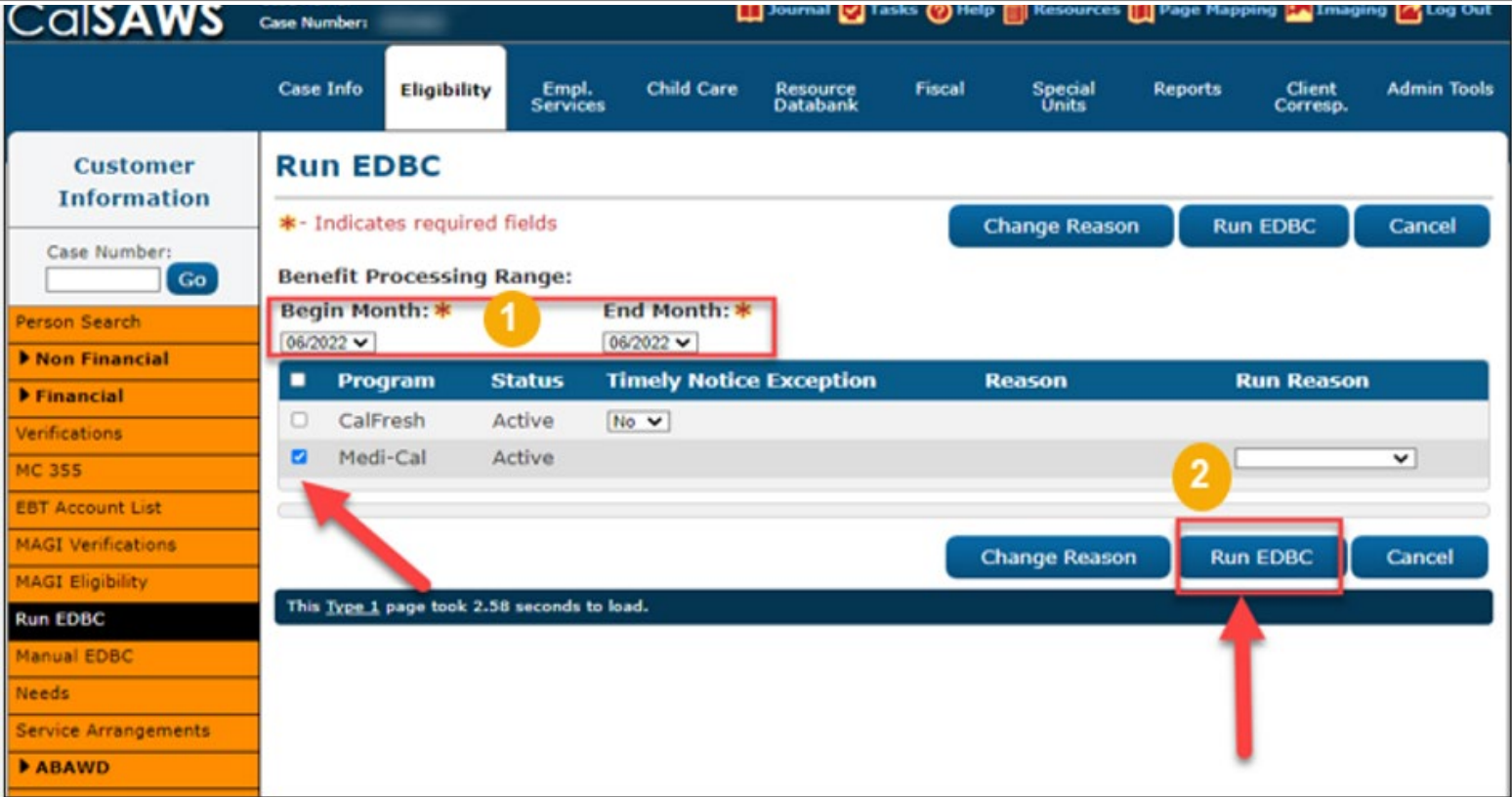
Screenshot

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
04/2022	04/2022	Medi-Cal	Regular	Accepted - Saved	Details	03/05/2022	Batch EDBC Rules



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.		
	<p>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.</p> <p>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.</p>		



Steps to Clear Alert		Screenshot
10	<p>From the Medi-Cal EDBC Summary page:</p> <ol style="list-style-type: none">Click on the Run EDBC link on the Task navigator. This will navigate the user to the Run EDBC page.	
11	<p>In the Run EDBC page:</p> <ol style="list-style-type: none">Select the desired program (Medi-Cal) and ensure the Begin and End Month are correct.Click the Run EDBC button. This will direct you to the EDBC List page.	




Steps to Clear Alert

12

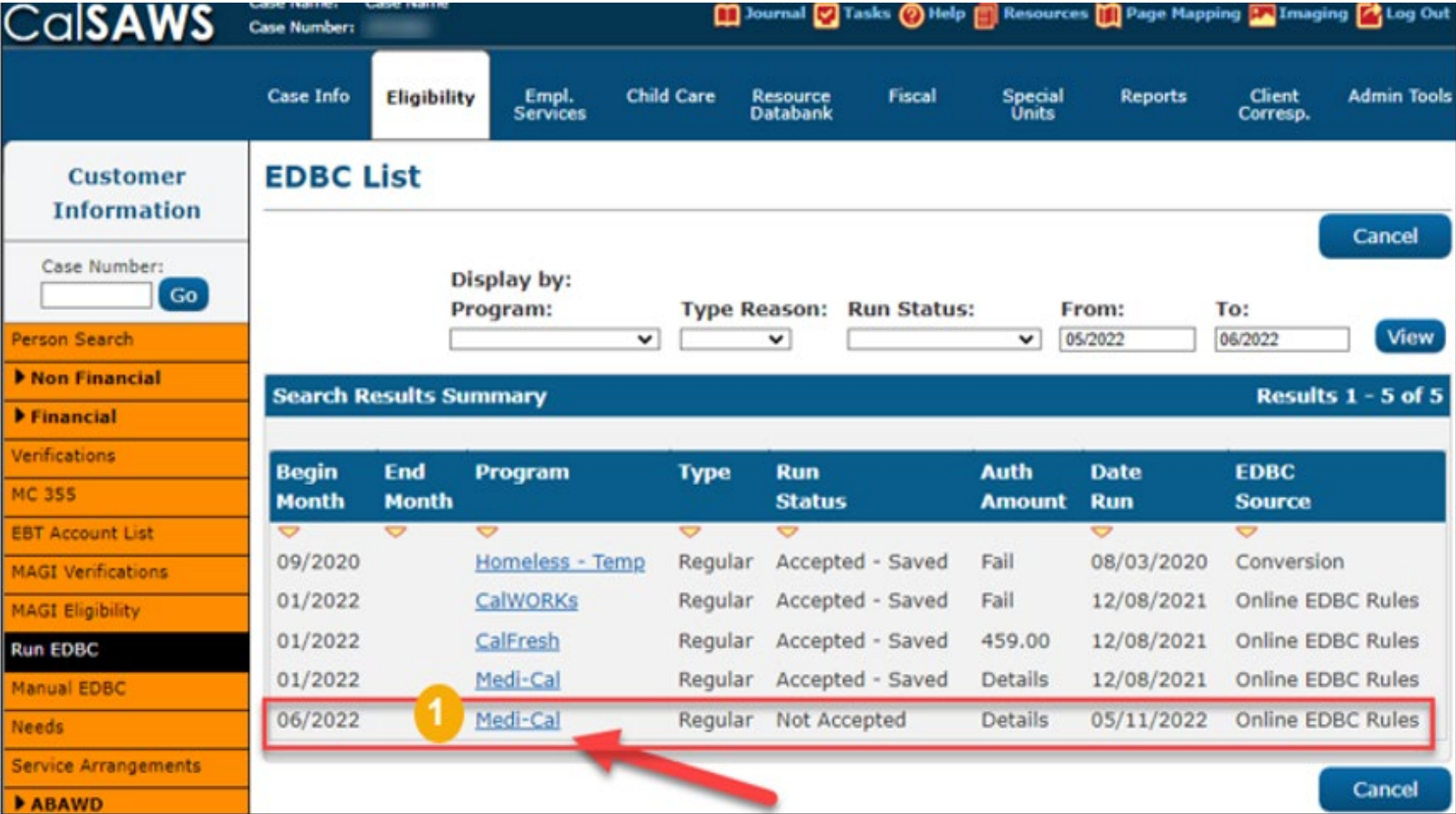
The **EDBC List** page will display the most recent EDBC results for all programs associated to the case.

★ 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”)

Screenshot



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	Not Accepted	Details	05/11/2022	Online EDBC Rules



Steps to Clear Alert

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.

Screenshot

Case Name:
Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tool

Customer Information

Case Number:
 Go

Person Search

Non Financial

Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Medi-Cal EDBC Summary

AcceptCancel

Begin Month	End Month	Run Date	Run Status	Accepted By
06/2022		05/11/2022	Not Accepted	

EDBC Information

Type: Regular

Recalculation: No

EDBC Ran for MAGI Only: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
		MEM		Active		
		MEM		Discontinued	Did not Request Full Medi-Cal Hierarchy	

Medi-Cal Summary

Note: Overridden rows are in bold.

Eligible Budgets for MEDS

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
MAGI	Pass	\$0	0.00				FRI	Doesn't Meet Program Req.
					M1		MEM	

Failed and Overridden Budgets

Test	Result	SOC	% Oblig	Aid Code	Members Tested	Role	Role Reason
TMC	Fail	\$0	0.00			FRI	Did not Request Full Medi-Cal Hierarchy
						FRI	Did not Request Full Medi-Cal Hierarchy

Override Medi-Cal Summary

AcceptCancel



Steps to Clear Alert

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.

Screenshot

CalSAWS Case Number: [redacted] Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Customer Information

Case Number: [redacted] Go

Person Search

- Non Financial
- Financial
- Verifications
- MC 355
- EBT Account List
- MAGI Verifications
- MAGI Eligibility
- Run EDBC**
- Manual EDBC
- Needs
- Service Arrangements
- ABAWD

EDBC List

• Medi-Cal NOA run is complete - NOA generated

Display by:

Program: [dropdown] Type Reason: [dropdown] Run Status: [dropdown] 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:

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.

CalSAWS Case Number:

Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Customer Information

Case Number: Go

Person Search

► Non Financial

► Financial

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Distributed Documents Search

* - Indicates required fields

► Refine Your Search

Search Results Summary Results 1 - 1 of 1

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
05/11/2022 7:54 AM	NOA - MC - MIXED HA HT - MAGI Approval and Discontinuance	1	Medi-Cal	Pending Review	Details

[Images](#)



Steps to Clear Alert		Screenshot	
16	<p>Users will be directed to a PDF preview of the NOA. Users will have the following options:</p> <ul style="list-style-type: none">- 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. <p>Select the appropriate status for the NOA. This will update the status in the Distributed Document Search page.</p>		
17	<p>This case review is complete.</p> <p>Document all actions taken per county policy, including journal entries, and the sending out any applicable Notices of Action.</p> <p>The Yellow Banner will no longer appear on the case.</p> <p>Do not proceed to Step 18.</p>		



Steps to Clear Alert		Screenshot
18	<p>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.</p> <p>Review the following pages for any pending information:</p> <ul style="list-style-type: none">- Verifications (Step 19)- Income (Step 20)- Tax Household (Step 21)- Customer Information- Non-Financial and Financial Data Collection pages (Step 22) <p>Once a full case review is complete, go to step 23.</p> <p>Additional Job Aids are available in CalSAWS in the Help Icon located in the Utilities navigator:</p> <p>JA EDBC – Troubleshooting Incorrect Results JA Medi-Cal – MAGI Referrals and Eligibility Determinations</p>	



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



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

Case Number:

JournalTasksHelpResourcesPage MappingImagingLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS Applicant

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Income List

* - Indicates required fields

ImagesContinue

Root Questions

CalHEERS Verifications

Name	Current Monthly Income	Federal Subsidy Income	State Subsidy Income	Verify Current Income
[Redacted]	E-Verified	Not Verified	Not Verified	
[Redacted]	E-Verified	Not Verified	Not Verified	

Search Results SummaryResults 1 - 2 of 2

Display From: To:

View

Name	Category	Type	Source	Begin Date	End Date	
<input type="checkbox"/> [Redacted]	Unemployment	UIB	EDD	09/01/2021		<div>Edit</div> <div>View History</div>
<input type="checkbox"/> [Redacted]	Earnings	Salary, Wages	Platinum Security	01/07/2022		<div>Edit</div> <div>View History</div>

Remove


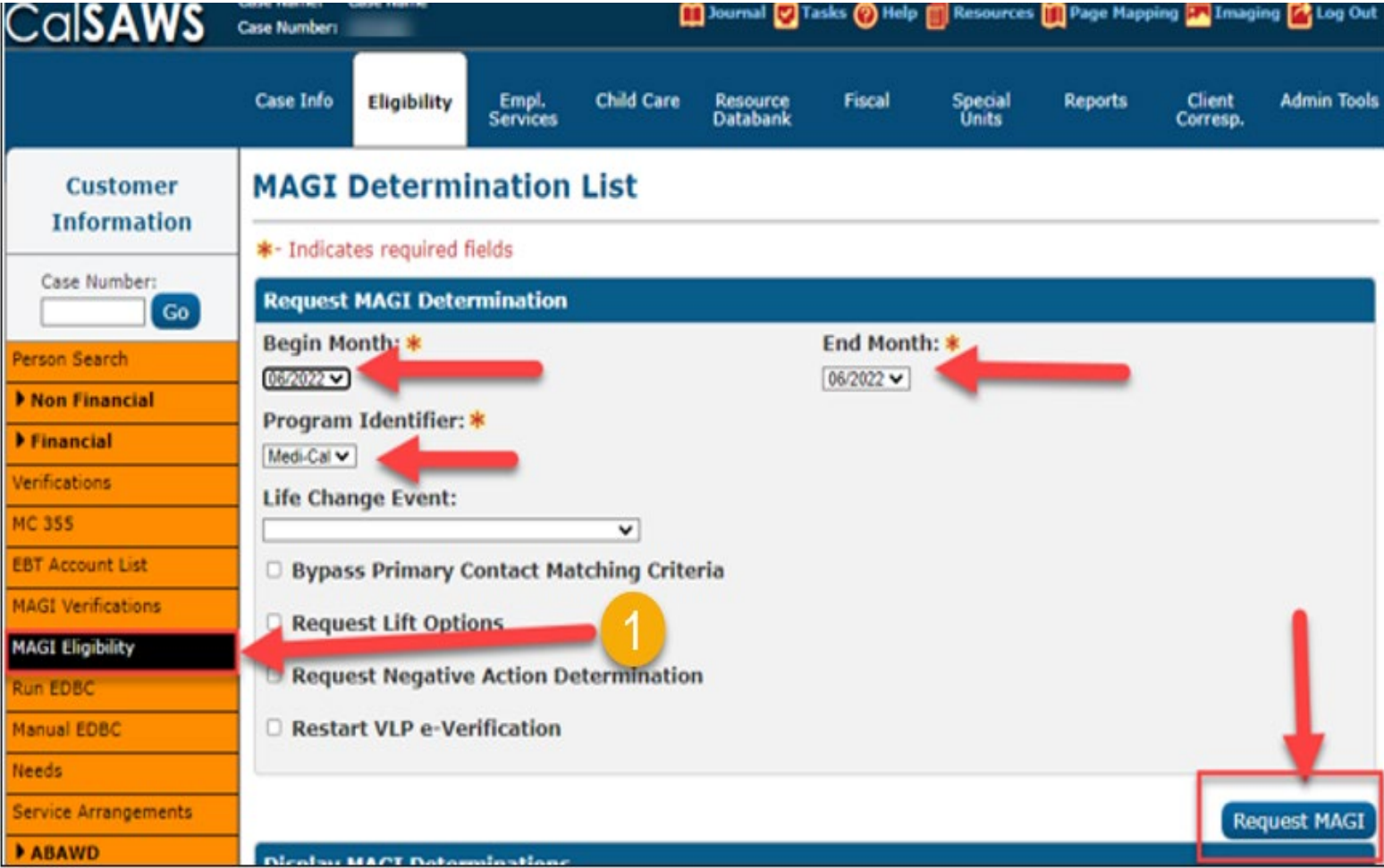
Income Category: *

Add



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

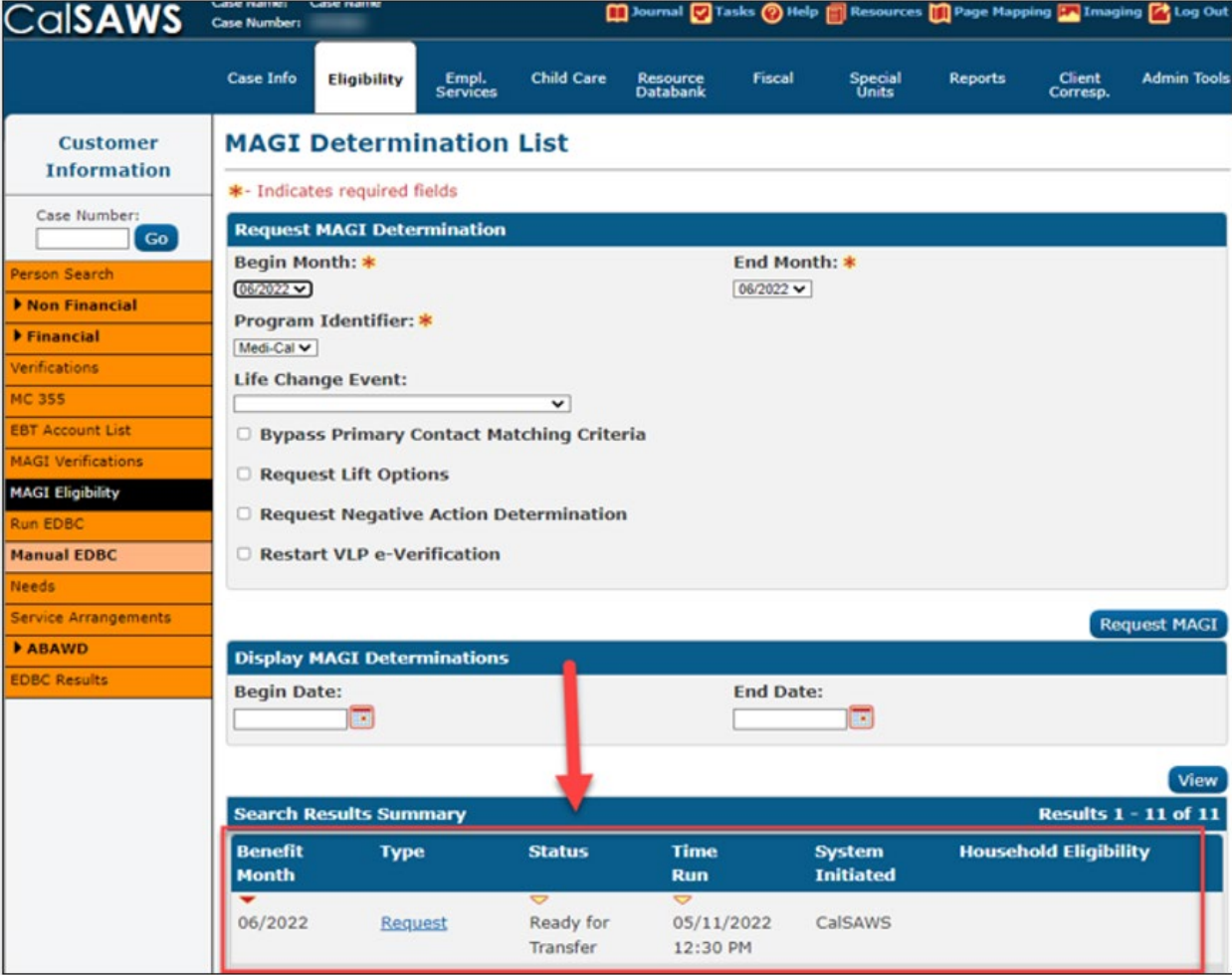
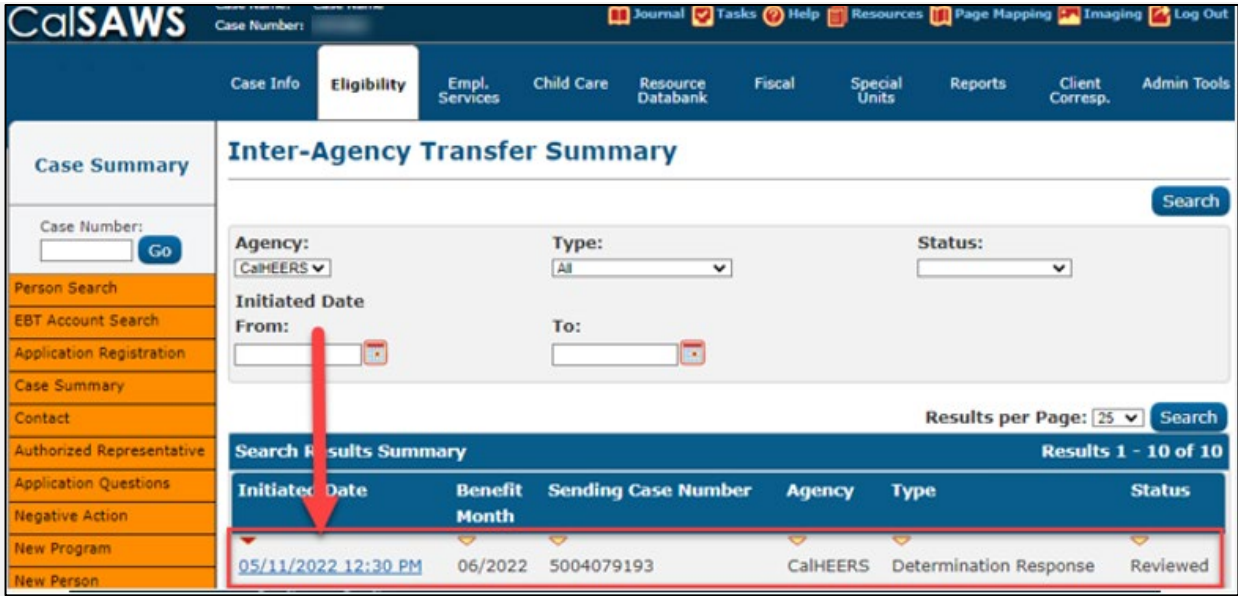


Steps to Clear Alert		Screenshot
23	<p>Once a full case review is complete, Users can request a MAGI Determination.</p> <p>1. Click on MAGI Eligibility in the Task navigator. Users will be directed to the MAGI Determination List page.</p> <p> The user will need to ensure the following information is accurate prior to making the request:</p> <ul style="list-style-type: none">- Begin/End Month- Program Identifier- Life Change Event (if applicable) <p>Once information is verified, Users can click the Request MAGI button. This will direct Users to the MAGI Request Detail page.</p>	



Steps to Clear Alert		Screenshot
24	<div>The MAGI Referral Detail page will display the following information that CalSAWS will transmit to CalHEERS:</div> <div><ul style="list-style-type: none">- 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</div> <div>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.</div>	



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

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.

Screenshot

The screenshot displays the 'MAGI Referral Detail' page in the CalSAWS system. The page is divided into a left sidebar with navigation links and a main content area. The main content area includes a 'Case Summary' section with a 'Case Number' field and a 'Go' button. Below this is a 'MAGI Referral Detail' section with fields for 'MAGI Case Number', 'MAGI Case Name', 'Initiated Date', 'Origination', 'Determination ID', 'Case Number', 'Case Name', 'Request ID', 'Type', 'Status', 'Covered CA Change', 'Run Reason', 'Benefit Month', and 'Program'. A red arrow points to the 'Application' section, which contains a table of eligibility evaluations. The table has columns for 'Name', 'Status', 'Soft Pause Lift', 'Negative Action Reason', and 'Eligibility Evaluation Reasons'. The first row shows a status of 'Eligible' and a 'Soft Pause Lift' of 'No'.

Name	Status	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
	Eligible	No		