MAGI Determination Pending

Priority Level: 3

<u>Programs Impacted</u>: 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_INCOMESSI_SSP_OPA
							MAGI Determination		MAGI Determination		
00	Sample	00	1305 Sample	XXXXXXXXX	XXXXXXX	Medi-Cal	Pending Pending	11/30/2022	Pending	3	

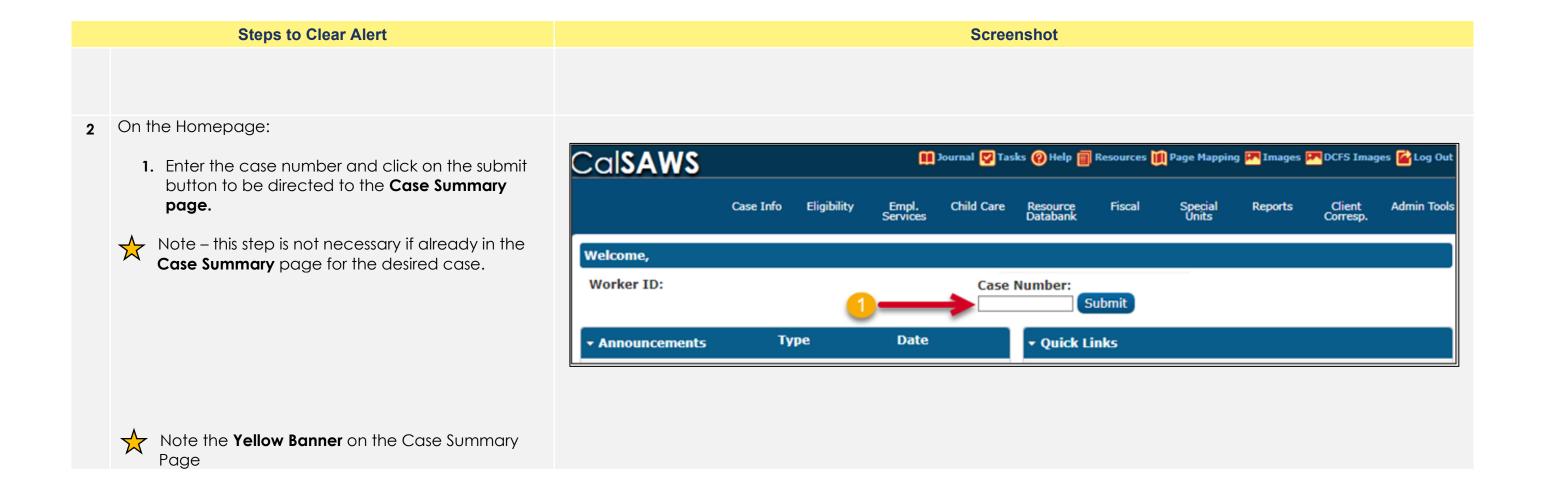
<u>Note:</u> The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all the information is entered as accurately as possible to allow for a correct determination to be made.

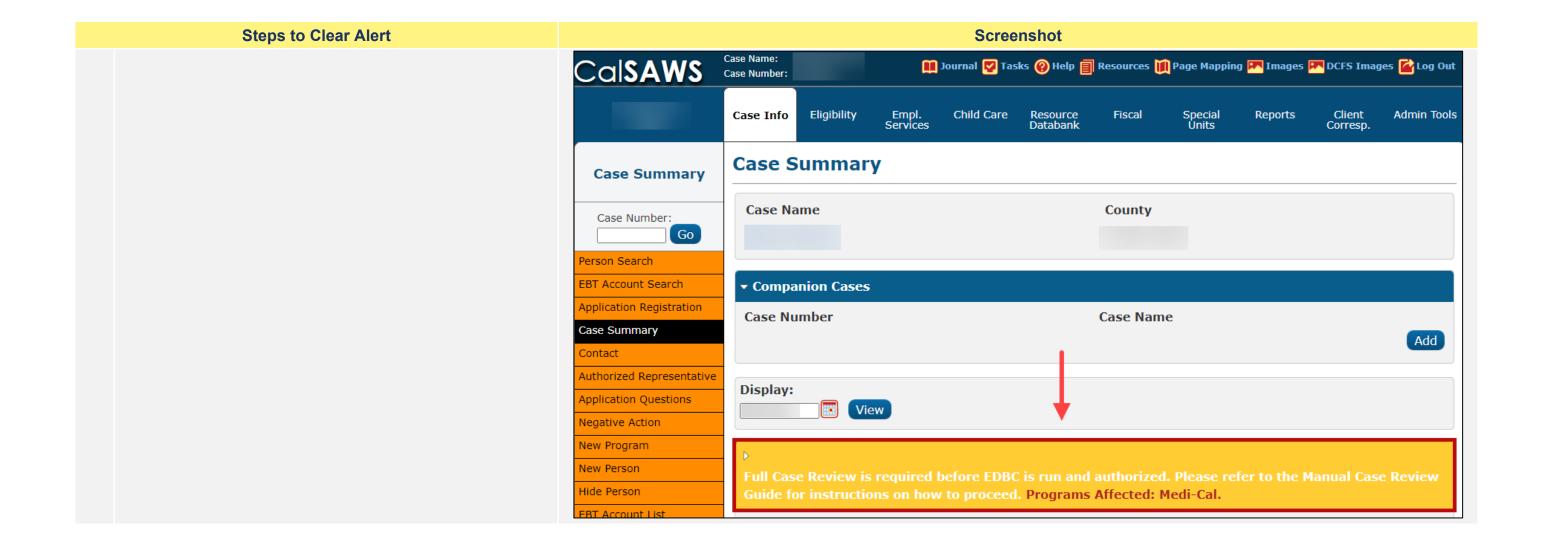
Example: The user will need to conduct a case review for this Medi-Cal Program with a Yellow Banner. This includes a review the DER/CalHEERS Referral, located on the IAT Summary page, and comparing it to the EDBC results converted over from CalWIN.

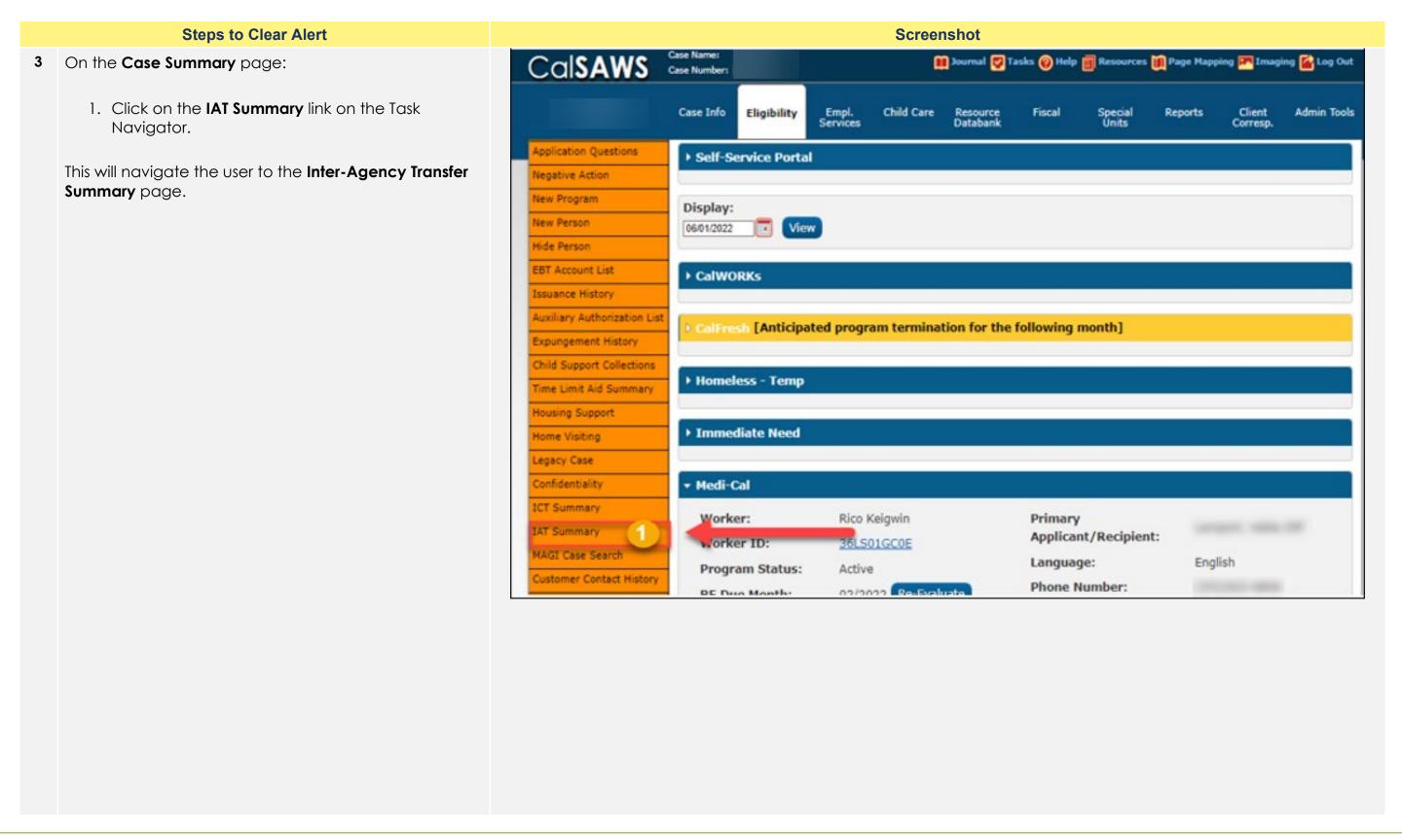
If the eligibility determination matches both in the DER and the EDBC results converted from CalWIN, the CalSAWS user can proceed to run EBDC. This action will confirm the eligibility of the individual(s) and remove the Yellow Banner. (Steps 1 – 17)

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.

Steps to Clear Alert Log in to CalSAWS by entering your Username and Password User Name Remember my username CAl User Step: Please use your CAV User Name and CAV Pleasevord upon first time toger.







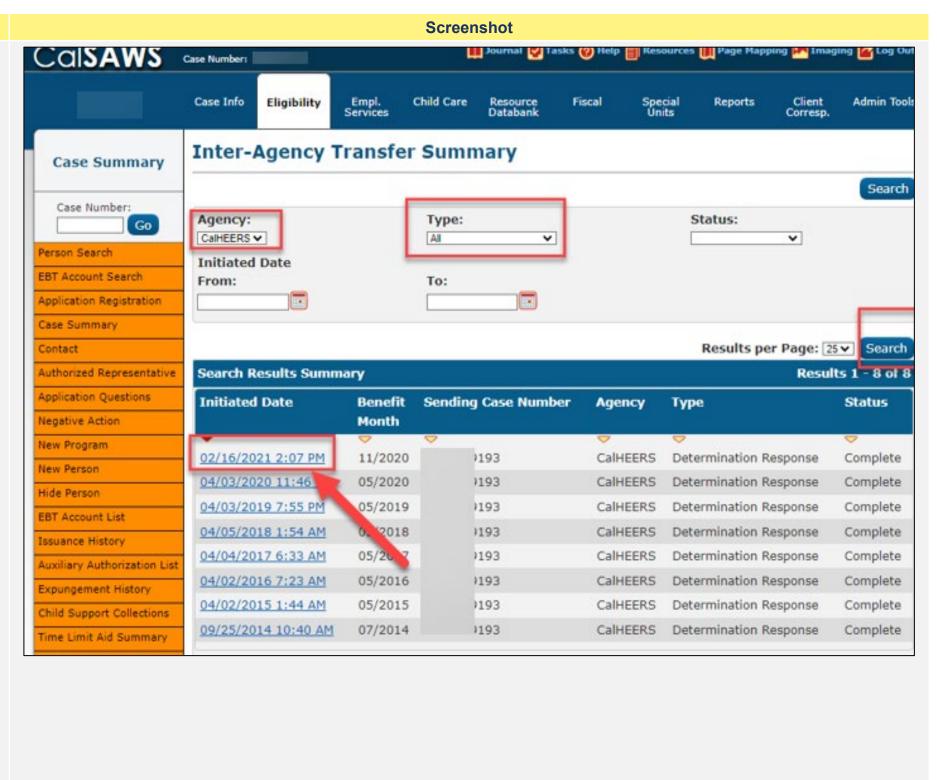
4 Once directed to the Inter-Agency Transfer Summary, the page should display the most recent Determination Response associated to this case.

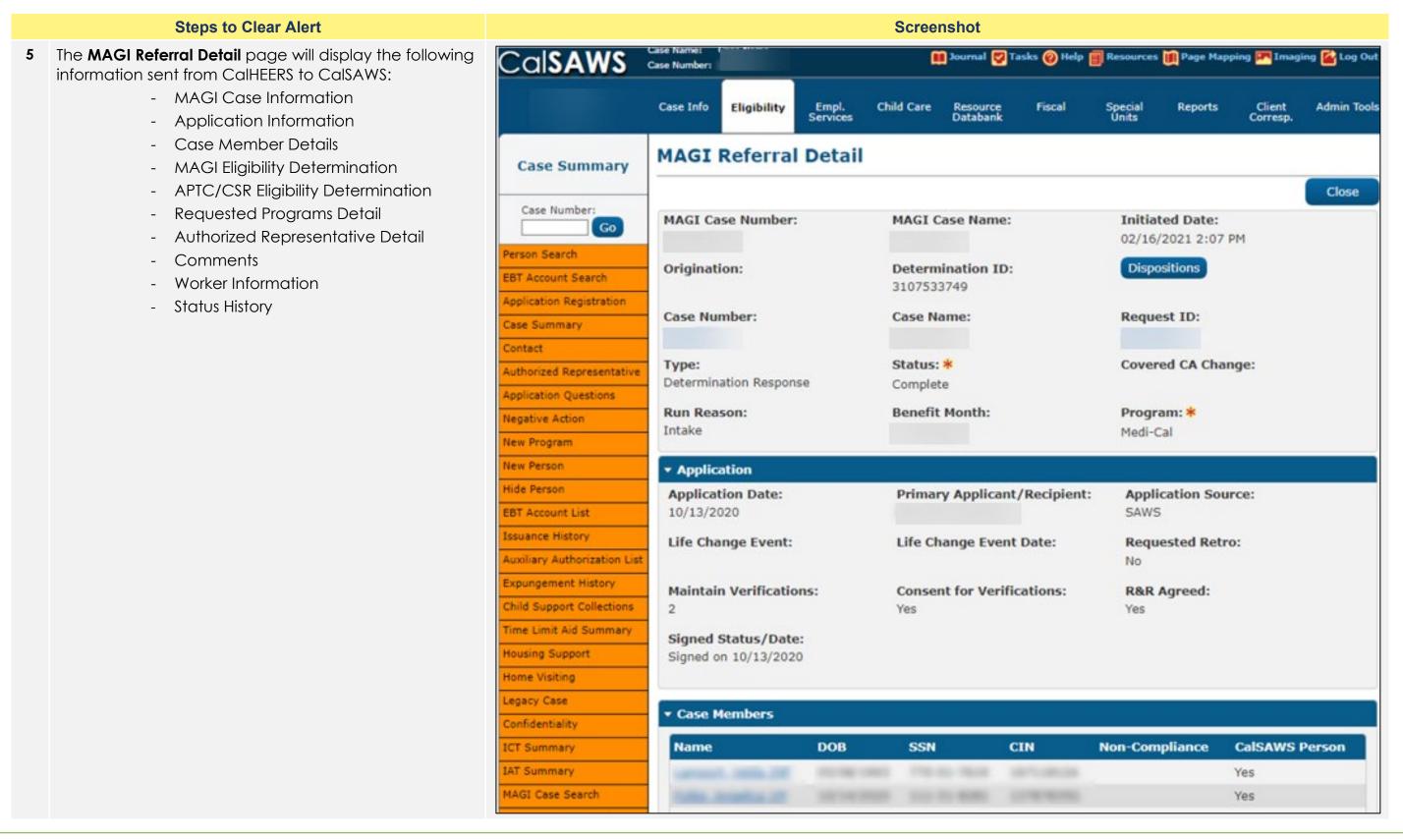


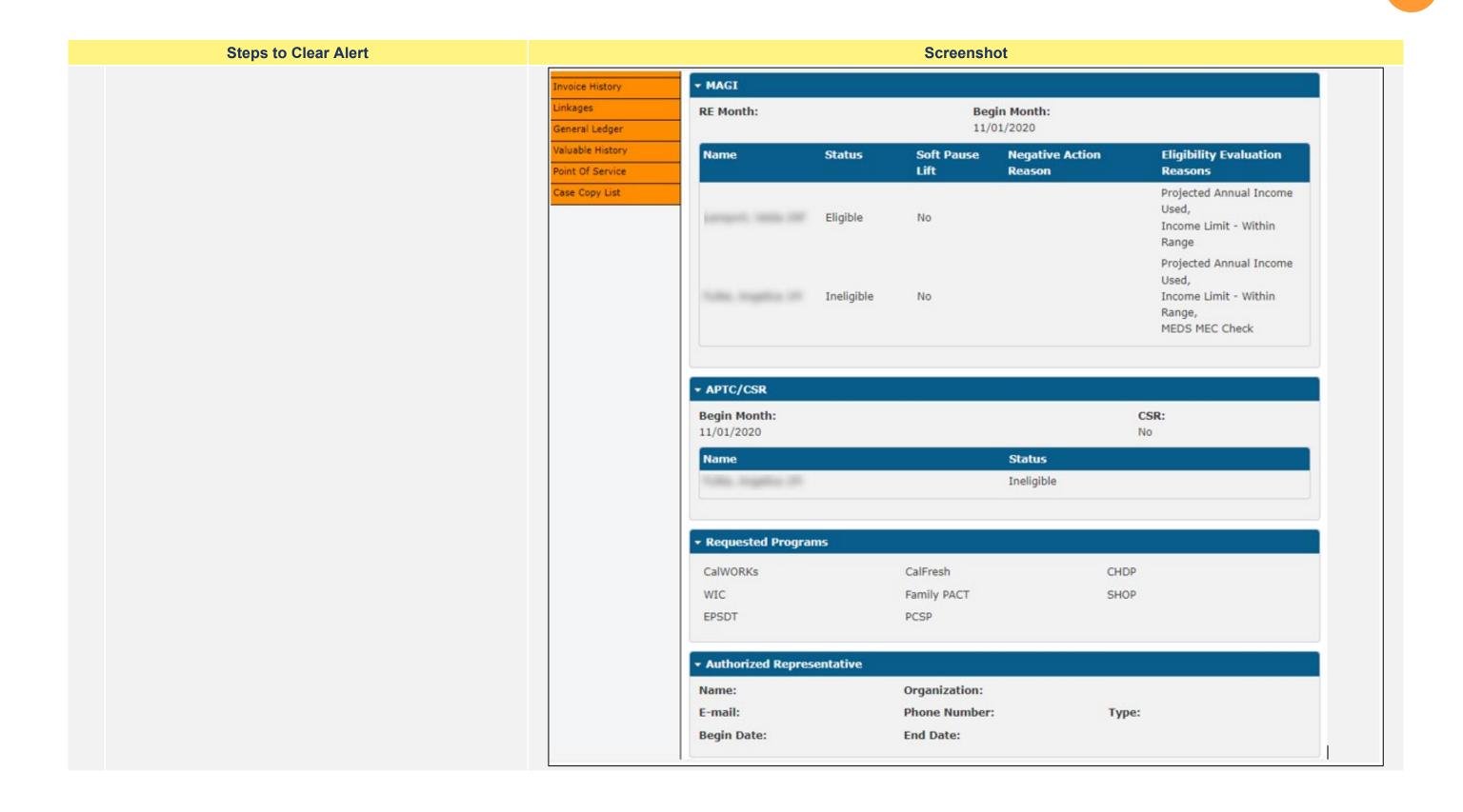
Note: A manual search can be conducted by filling in the search criteria listed on the screen.

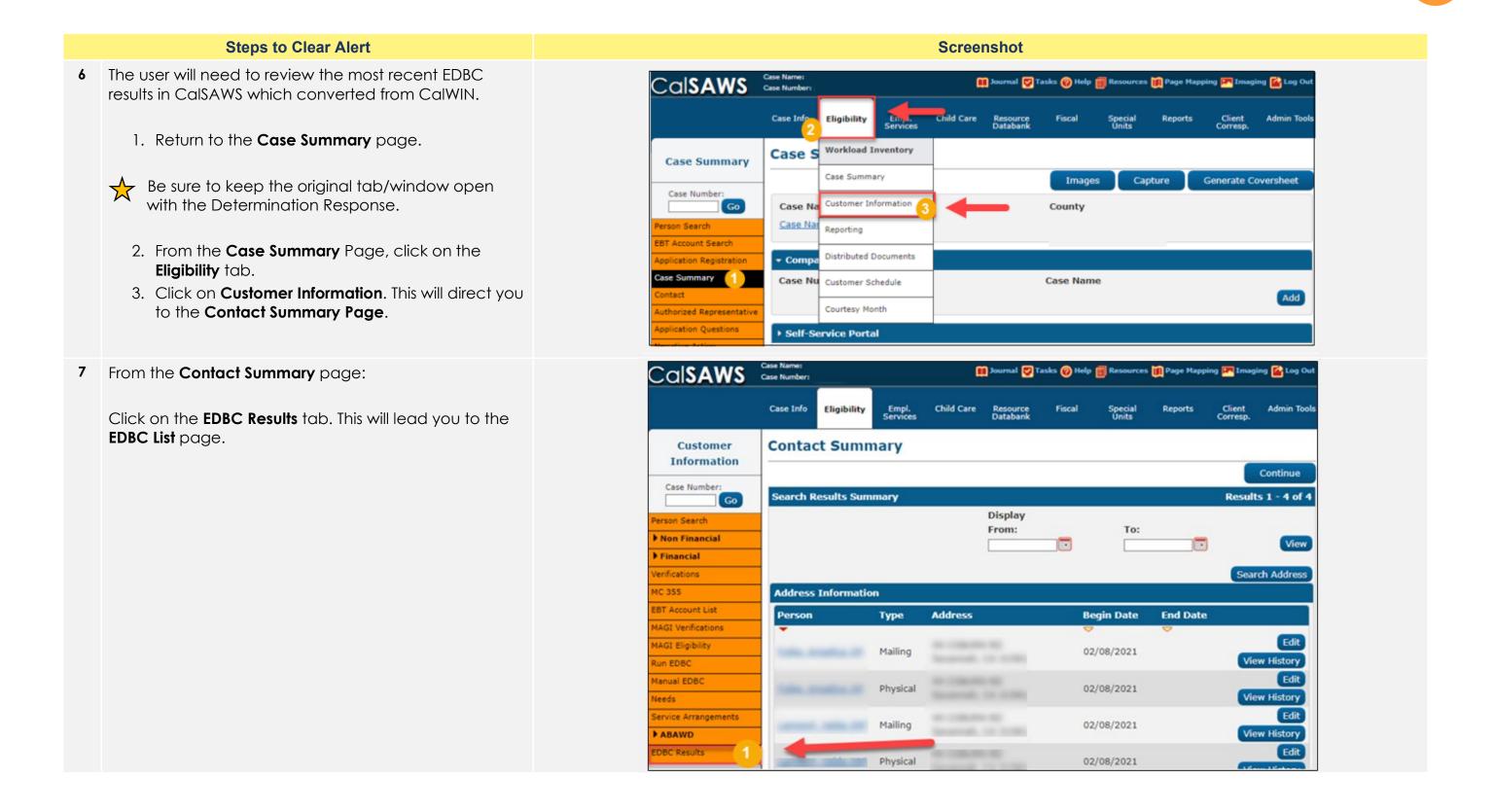
- Agency: CalHEERS
- Type
- Status
- Initiated Date (From, To)

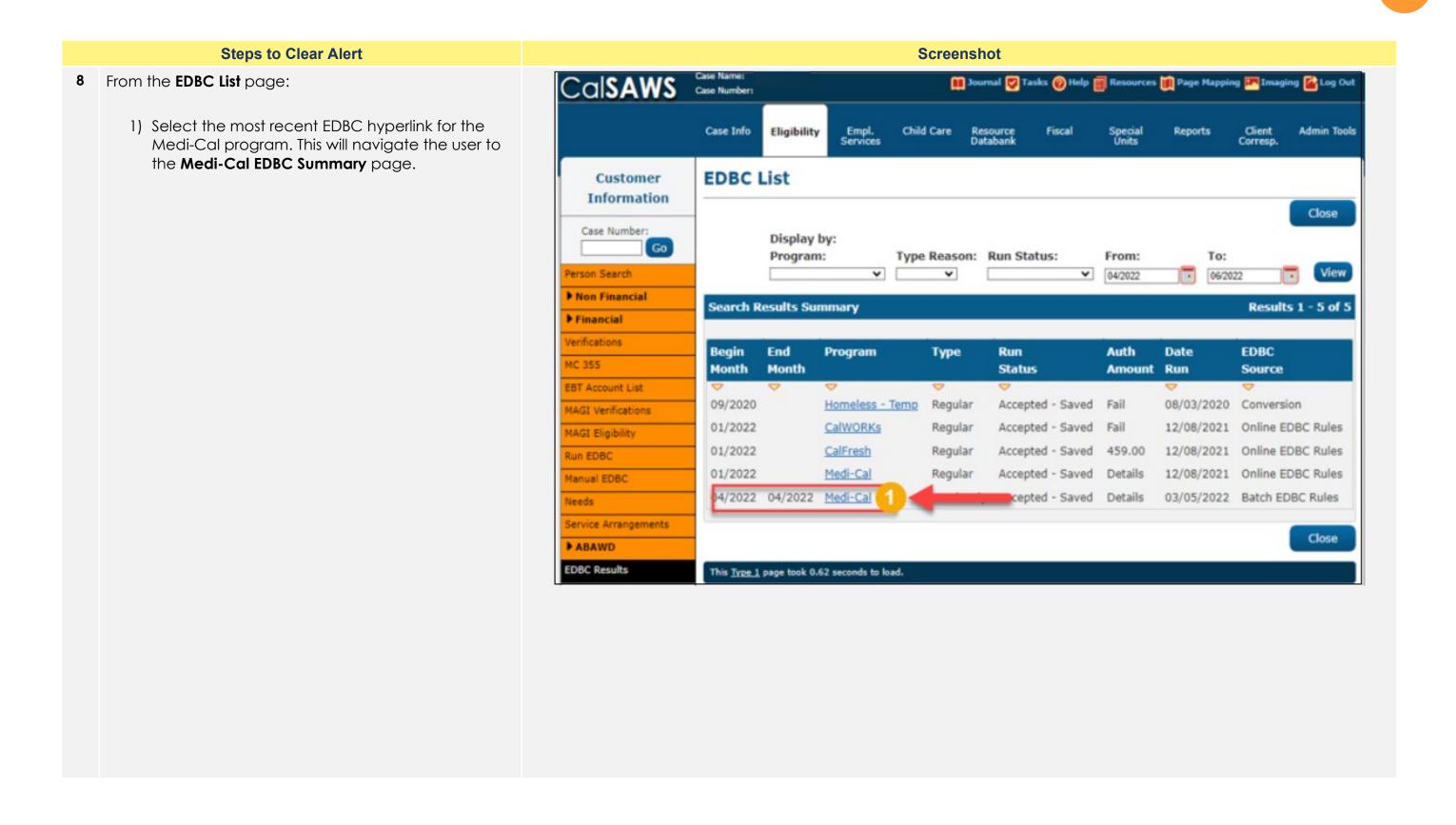
To view the determination response, click on the Initiated Date hyperlink. This will lead you to the **MAGI Referral Detail** page.

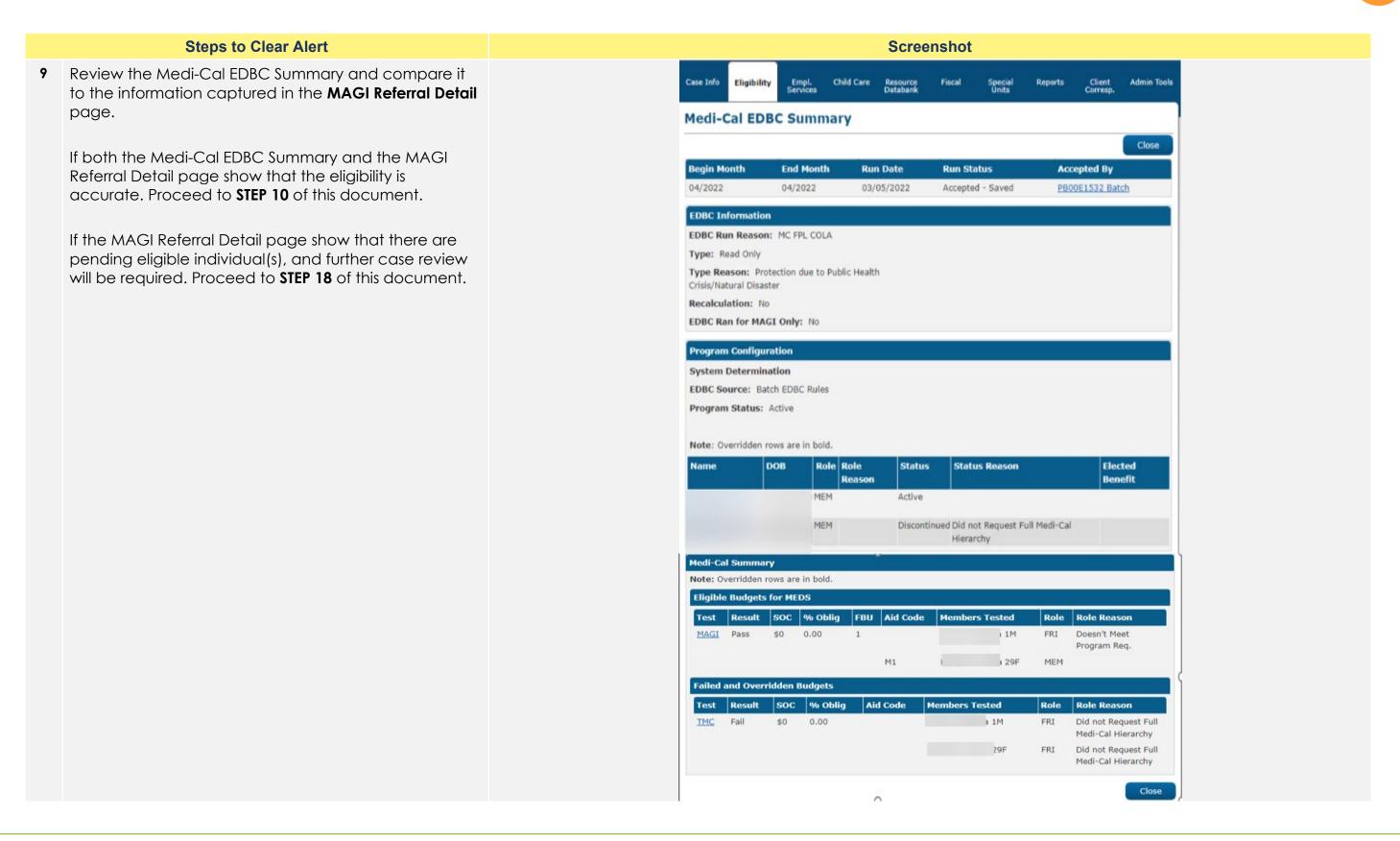


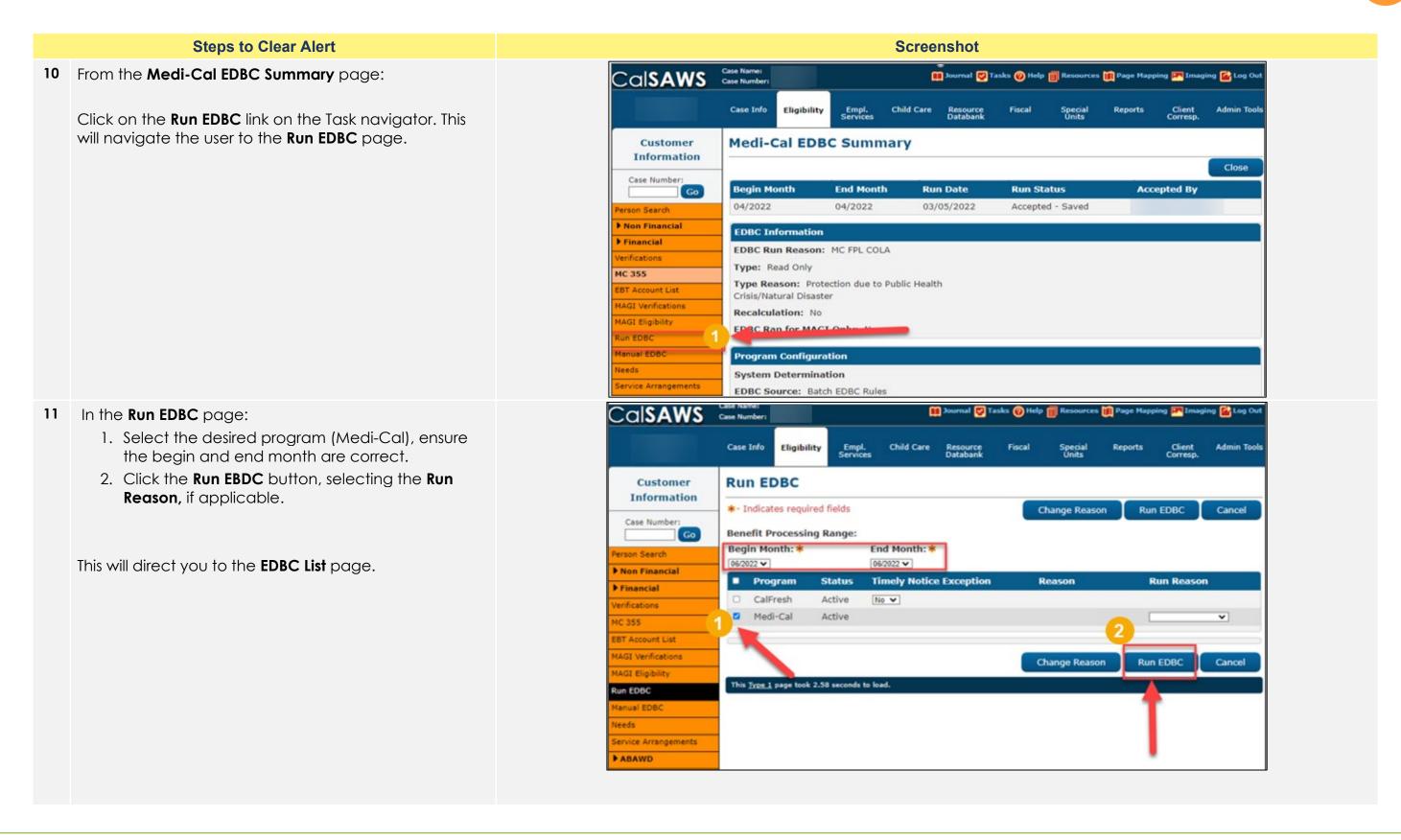


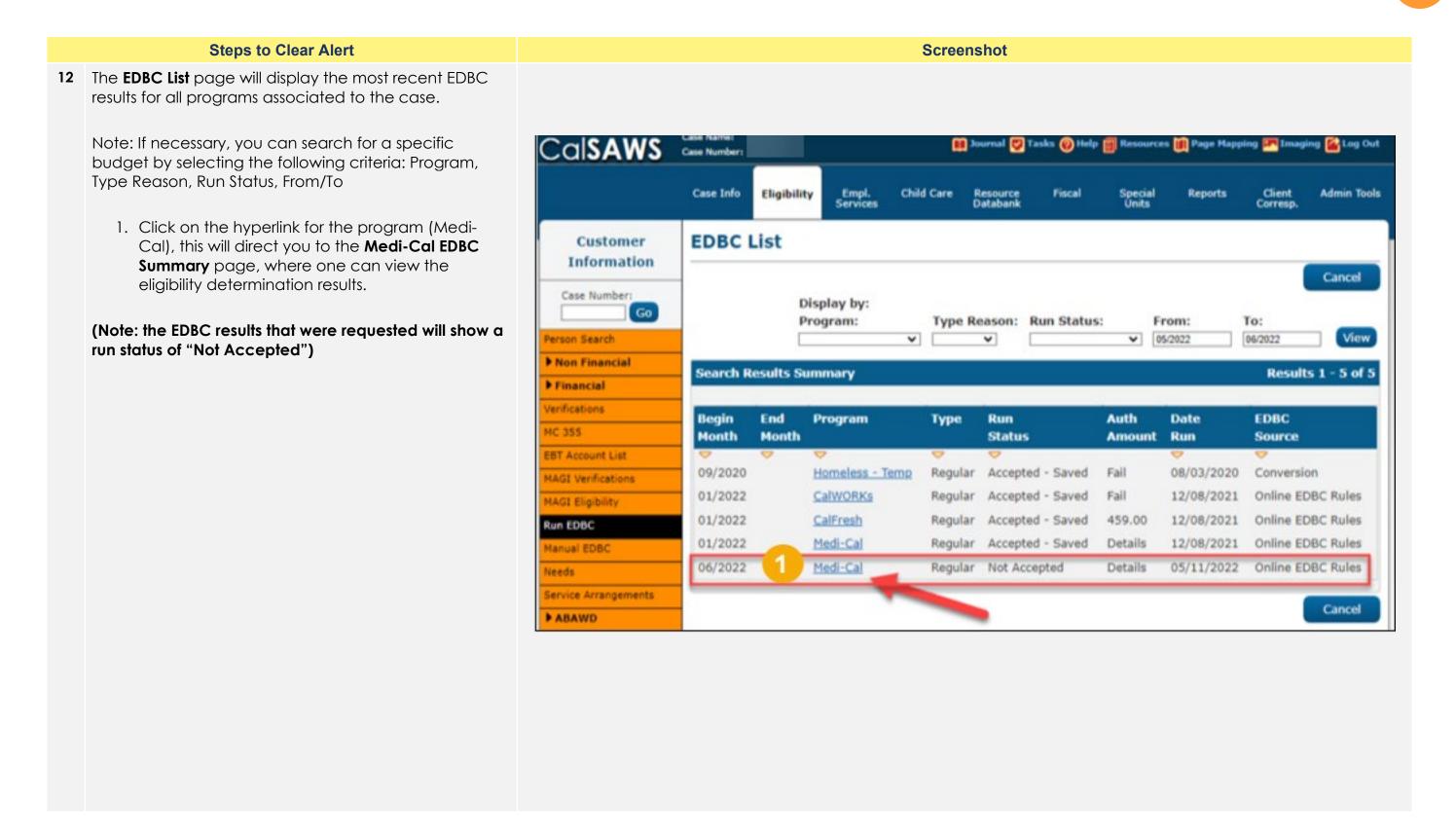










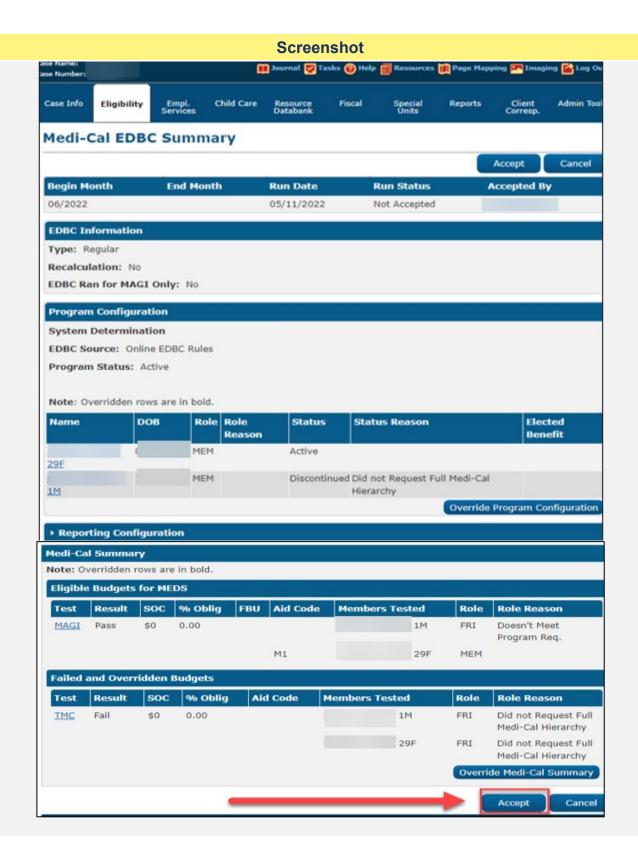


The Medi-Cal Summary page will display the following:Benefit Month and Program Status

Steps to Clear Alert

- 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.

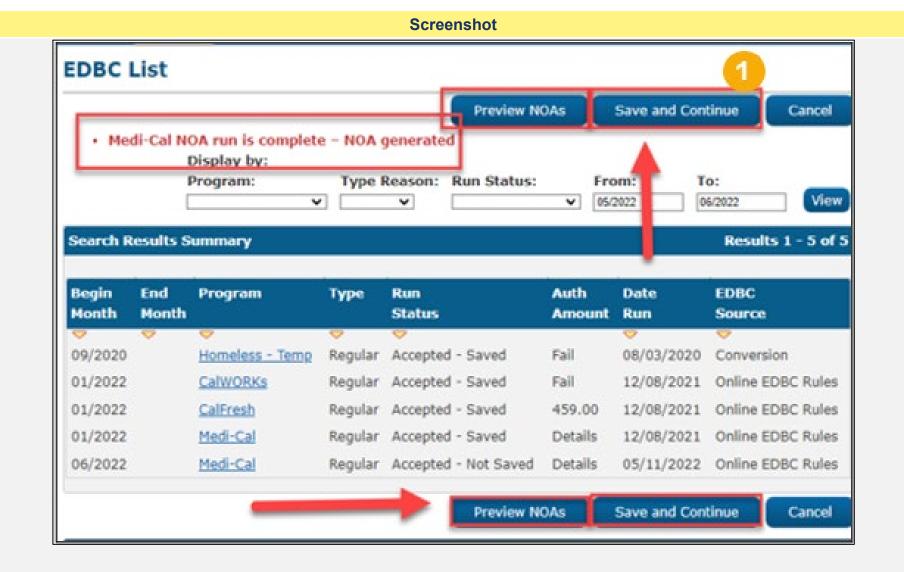


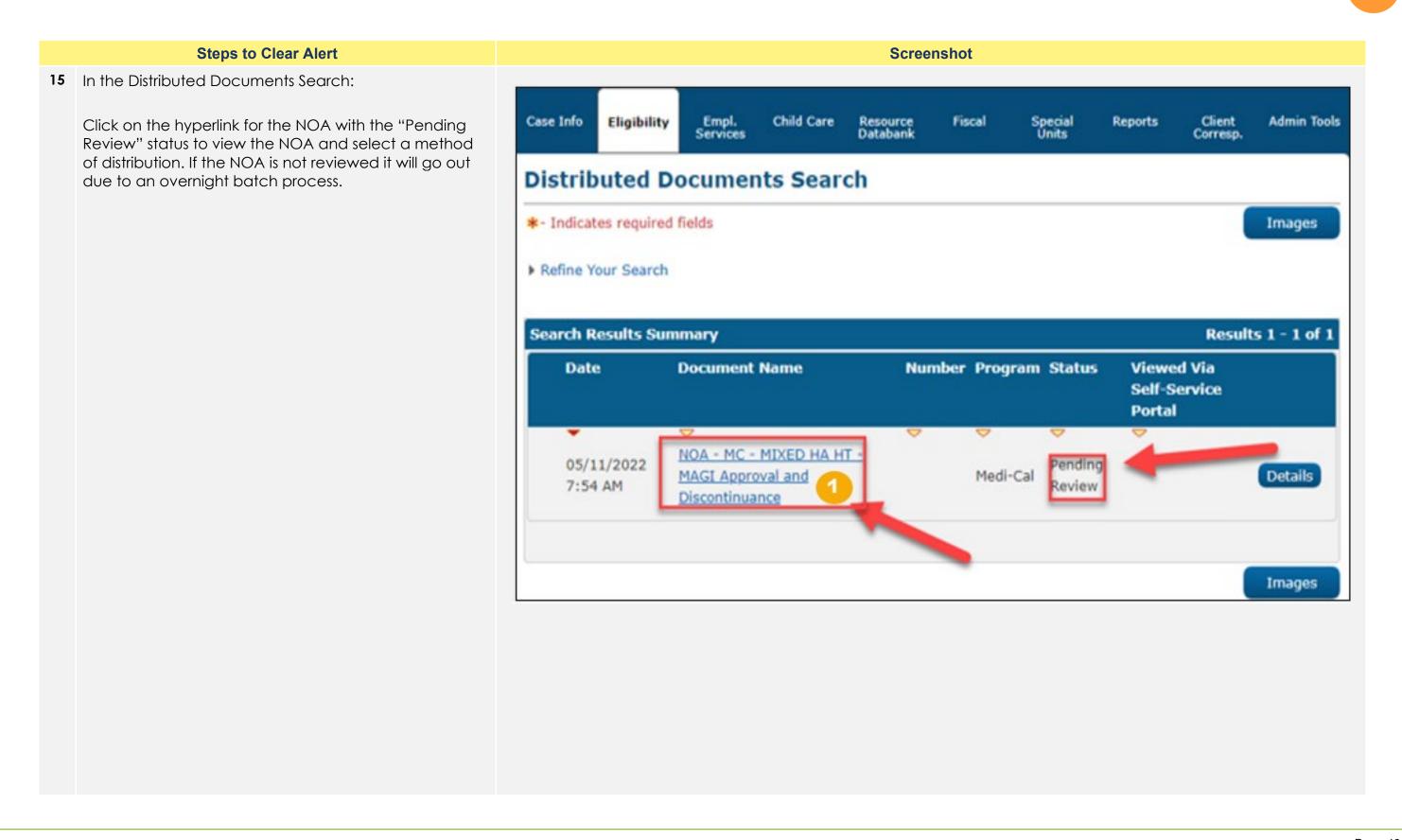
- Now that the Medi-Cal program EDBC results have been saved, the **EDBC List** page will display the following:
 - A message to inform the user that a Notice of Action was created.
 - A Preview NOA button, which allows the user to view the notice prior to distribution.
 - A Save and Continue button, which allows the user to save all the actions taken.

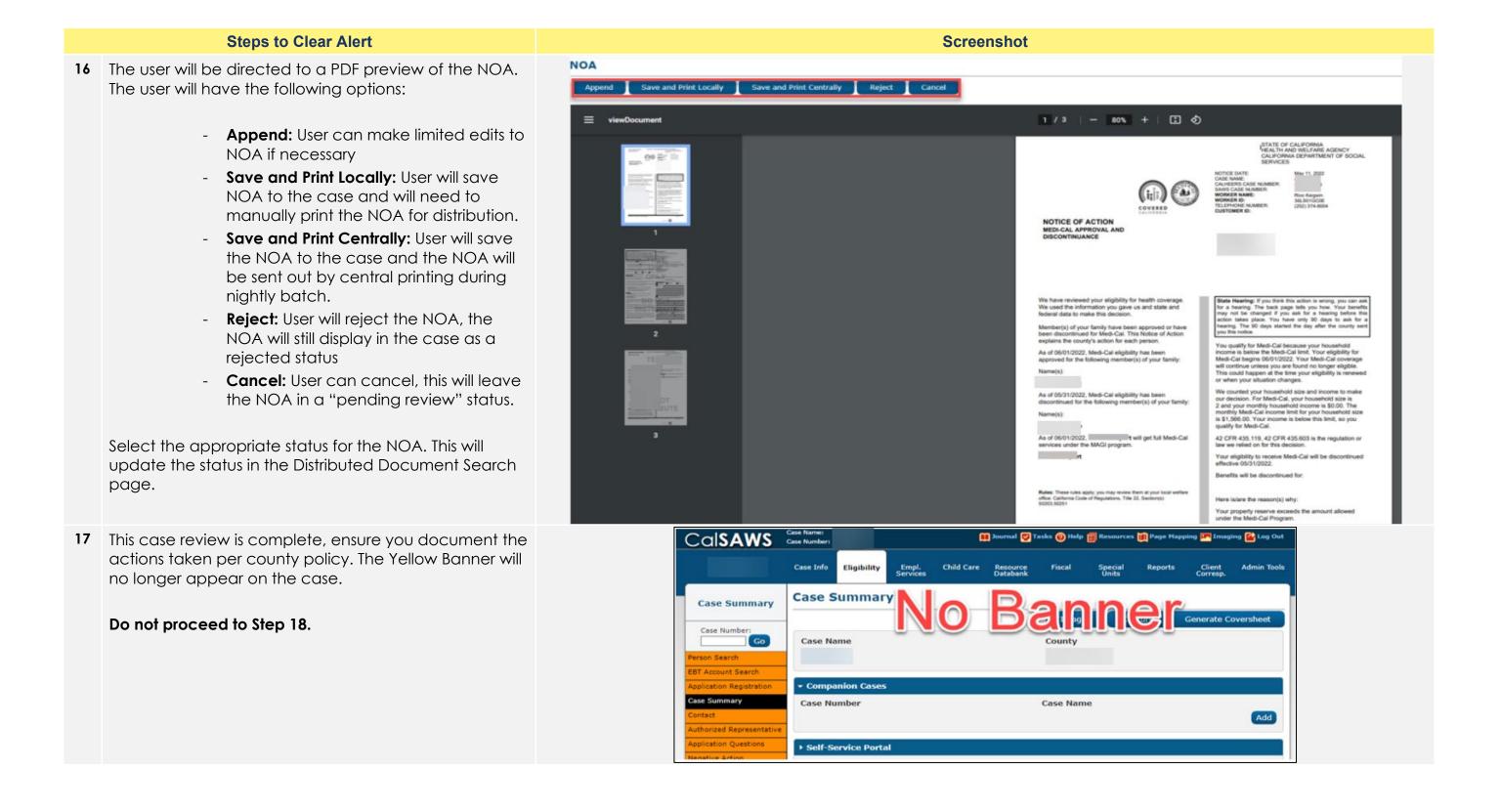
Review the NOA's for accuracy.

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.







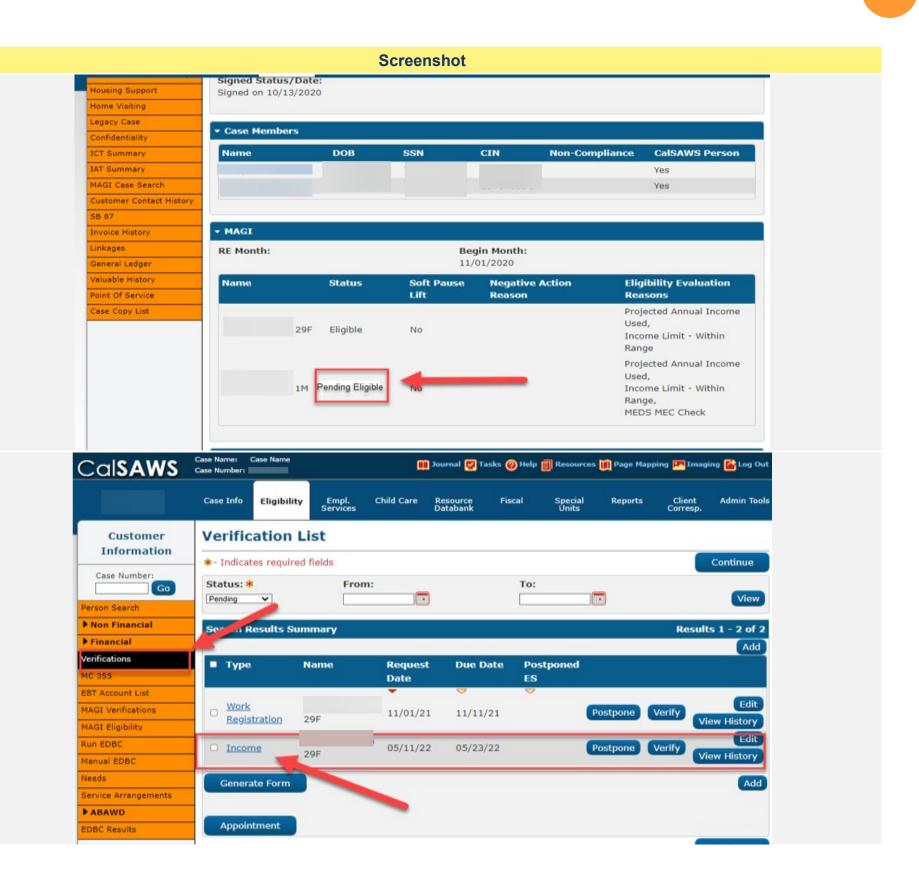
The MAGI Referral Detail on Step 5 is showing that there are individual(s) with a Pending Eligible status coming from CalHEERS. The eligibility for the individual(s) must be reviewed and determined to remove the Yellow Banner. The suggestion would be to begin the review of the following pages: - Verifications (Step 19) - Income (Step 20) - Tax Household (Step 21) - Non-Financial and Financial Data

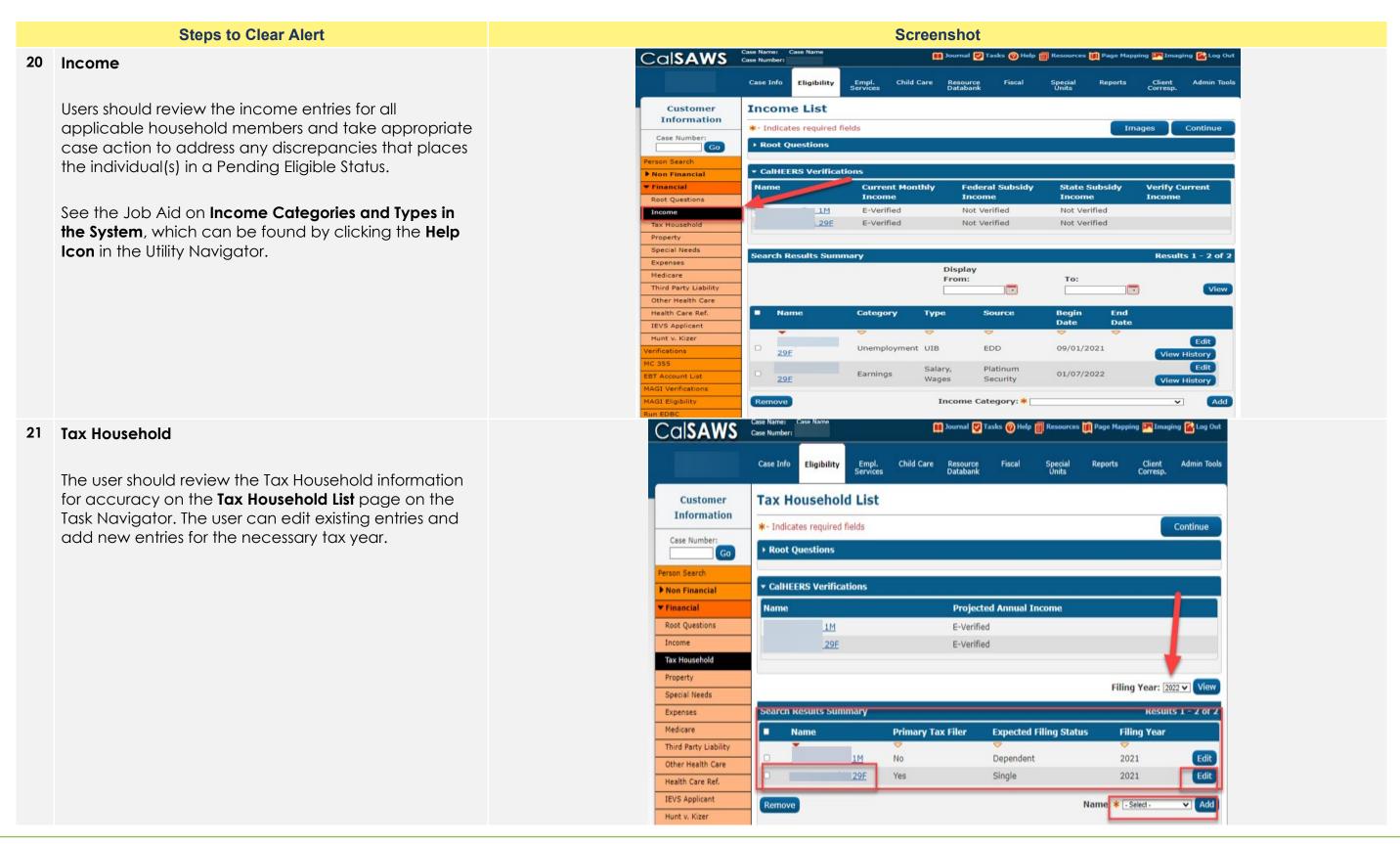
Collection pages (Step 22)

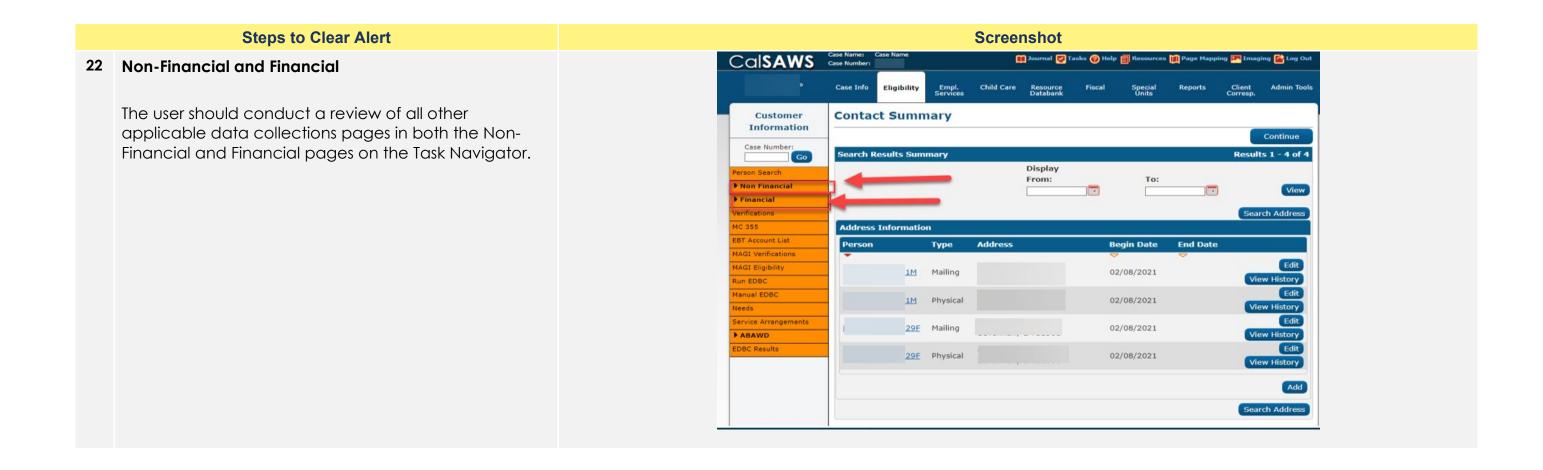
Once a full case review is complete, go to step 23.

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.







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:

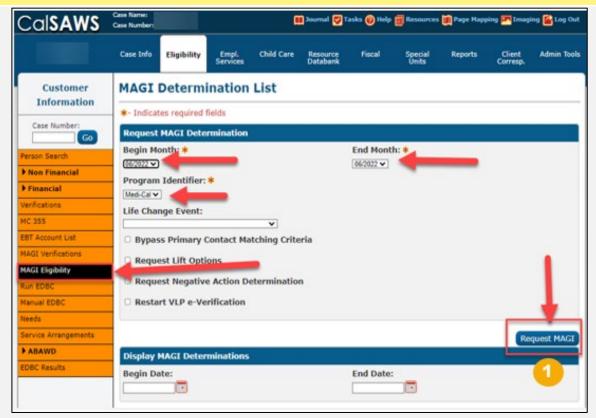
Click the **Request MAGI** button. This will direct the user to the **MAGI** Request Detail page.

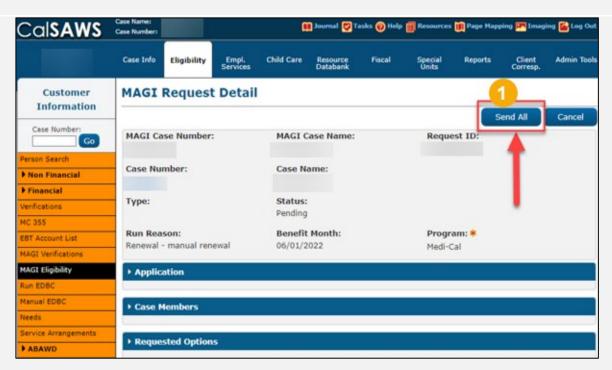
- The MAGI Referral Detail page will display the following information that CalSAWS will transmit to CalHEERS:
 - MAGI Case Information
 - Application Information
 - Case Member Details
 - MAGI Eligibility Determination
 - APTC/CSR Eligibility Determination
 - Requested Programs Detail
 - Authorized Representative Detail
 - Comments
 - Worker Information
 - Status History

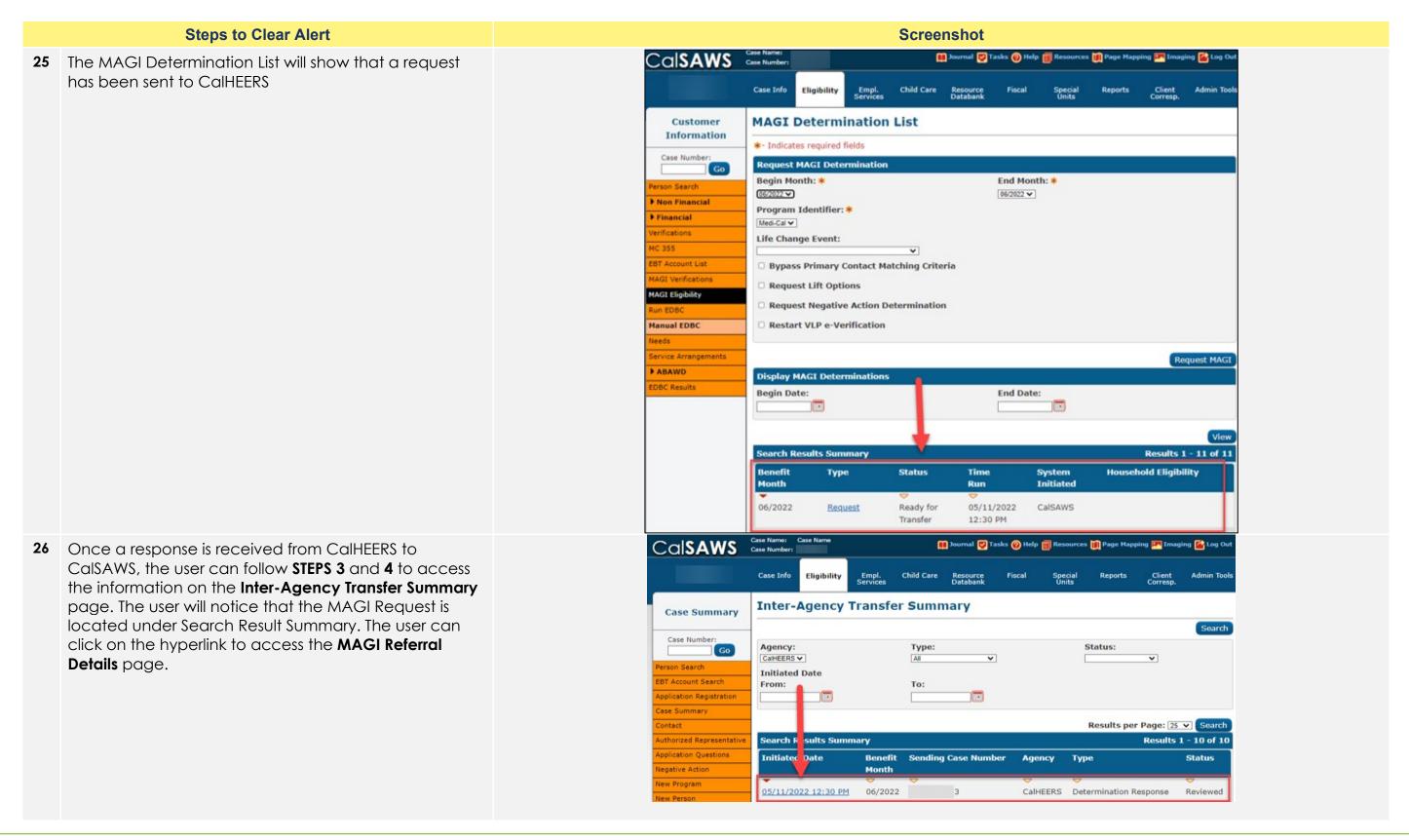
The user can review the information, once confirmed for accuracy, the user can:

Click the **Send All** button to send the request. The user will navigate to the **MAGI Determination List** page.

Screenshot







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

