



HCBS Spousal Impoverishment Screening Case Flag and Automated Action

This CalSAWS Quick Guide (QG) provides the end-user with information on the HCBS Spousal Impoverishment (SI) Screening case flag and automated action in the System.

The QG can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The QG may include functional instructions, as well as screenshots from the System. It may highlight new functional processes, pages, page sections, fields, drop lists, etc.

This document is intended for County use. It is not intended for public distribution.

CalSAWS Process

In CalSAWS, case flags act as indicators for end users to be aware of any case actions or review needed. Case Flags can be Project-Maintained or created by County users with the appropriate security rights when necessary. Actions on case flags are dependent on County business process and policy.



This guide provides information on the following topics:

- Case Flags Overview
- HCBS Spousal Impoverishment Screening Case Flag and Automated Action

Case Flags Overview

Counties may create case flags to indicate case information needs to be reviewed or acted on. Certain case flags are created and maintained by the Project and cannot be edited or removed through the Flag Search page.

There are two categories of case flags available in the System:

- Worker Action flags (red ) – Indicates worker action is needed to address the flag, allows Counties to enter a due date for the worker to take action
- Reporting flag (white ) – Can be used when a County, State, or Federal study is being conducted; special investigation inquiries; quality control or quality assurance inquiries; or for other tracking purposes as determined by the County

Additional information on Case Flags can be found in the following Job Aid:

- Flagging - Create and Assign to Cases



HCBS Spousal Impoverishment Screening Case Flag and Automated Action

The HCBS Spousal Impoverishment Screening case flag was added to the System based on state guidelines as a tool to assist Counties in identifying cases that required additional screening to determine if SI provisions may apply.

This flag is applied to cases containing individuals who meet the following criteria:

- Have a spouse with a marital status of married, registered domestic partner (RDP) or separated
- Are granted Medi-Cal with a share of cost
- Are enrolled in one of the HCBS waiver and/or programs

The case flag is created via batch monthly for Medi-Cal cases with new HCBS participants who meet the flag criteria.

Flag Detail

*- Indicates required fields

Close

Title: *
HCBS Spousal Impoverishment Screening

Category: *
Reporting

Track Identifier:

Begin Date: *
12/19/2024

Description:

Assigned Reminder:
Individuals on this case are participating in Home and Community-Based Services (HCBS) programs or waivers and require additional screening to determine if Spousal Impoverishment (SI) provisions may be applied.

Type: *
State

Contact Person: *
90

End Date:

Depending on your County, a task is also available to remind users to take appropriate action. This automated action is titled Medi-Cal Program: Spousal Impoverishment Review. It triggers on active Medi-Cal programs that are associated to a case that has a HCBS Spousal Impoverishment Screening case flag, and the program has a renewal due in two months. The batch job is scheduled the 1st day of each month (Monday to Saturday).

Example: Renewal due April 2025, batch runs 2/1/2025 to retrieve cases with the HCBS Spousal Impoverishment Screening case flag.



Automated Action Detail

[Edit](#)
[Close](#)

Action Information

Name: Medi-Cal Program: Spousal Impoverishment Review	Type: Create Task	Status: * Active
Program(s): MC	Run Date: 1st day of each month (Mon-Sat)	Source: * Batch
Scenario: A case flagged with Spousal Impoverishment is due for renewal.		

Task Information

Task Type: * Spousal Impoverishment Review	
Due Date: Default Due Date	Default Due Date: 5 days
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker
Sibling Assignment: No	
Long Description: The Case has a Spousal Impoverishment flag, and the program is due for renewal.	

This automated action can be edited and customized to fit a County's business process.

A monthly waiver list is also distributed to Counties by the Department of Health Care Services (DHCS) with the information to allow flexibility for their business process. Users should act on these programs based on their County's policy and procedures.