

# Processing Guide – 2013 Medi-Cal Annual Redetermination (RV) Reconciliation Project

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**Purpose** To provide instructions for staff on required actions to reconcile incorrect RV due dates.

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**Overview** All Medi-Cal beneficiaries must have their eligibility for Medi-Cal redetermined every 12 months. The annual RV is generally set 12 months from the first day of the application month. If the applicant is not eligible in the month of application, then the RV month is set the first month in which the applicant meets all eligibility criteria.

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**When is a RV Due on a Case** The Annual RV must be completed by the last day of the 12<sup>th</sup> month from the month of application, approval month, or the last Annual RV.

Example:



Reminder:

Once an Annual RV is completed, the next RV due date must be set based on Medi-Cal regulations and not CalWIN functionality. See [Article 4, Section 15.2](#) and the [Setting Medi-Cal Redetermination \(RV\) Due Dates](#) desk aid for more information on RV dates.

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**CalWIN  
Functionality**

When a Medi-Cal RV is completed, CalWIN automatically establishes the RV due date based on the completion date rather than the date of application or the previous redetermination. This functionality will be fixed with a future CalWIN release scheduled for May 2013.

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**Required  
Action**

A one-time reconciliation project phased over 12 months will be conducted for all continuing Medi-Cal cases beginning with February 2013 RVs (Target completion date – January, 2014).

FRC staff shall follow the steps outlined below to review for conflicting RV due dates:

<b>Step</b>	<b>Action</b>
1	Review the <a href="#">MC RV Reconciliation Report</a> located on SharePoint using the Office Extract feature.
2	Reconcile the RV due dates on the listed cases by comparing the RV due month to the application date and reestablishing the correct RV due month for discrepant cases.  <b>NOTE:</b> The <a href="#">Reconciliation Examples</a> section of this document provides handling instructions for special circumstances.
3	All case actions related to the reconciliation shall be documented in case comments.
4	Record the results of each case review on the <a href="#">MC RV Reconciliation Report</a> under the column heading "Rev. Findings" by selecting one of the following dropdown options: <ul style="list-style-type: none"><li>• <b>RV Date Changed</b></li><li>• <b>RV Date Correct</b> (This option may apply to cases in which the RV due date does not match the application date, such as Deemed Eligible, CEC/FFCC, or when a family has Medi-Cal and later applies and is approved for CalWORKs.)</li></ul>
5	Submit findings to the FRC Corrective Action Supervisor (CAS) for roll-up to Eligibility Operations & Corrective Action

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**Review  
Schedule**

The MC RV Reconciliation Report will be posted on SharePoint the **first** week of the 10<sup>th</sup> month. All reviews must be completed each

month before the scheduled CalWIN RRR Batch run (usually **the 15th day of the 10th month**) to ensure that the Batch run only captures cases that are truly due for redetermination in the RV Due Month.

RV Due Month	Review Due Date
February 2013	December 15, 2012
March 2013	January 15, 2013
April 2013	February 15, 2013
May 2013	March 15, 2013
June 2013	April 15, 2013
July 2013	May 15, 2013
August 2013	June 15, 2013
September 2013	July 15, 2013
October 2013	August 15, 2013
November 2013	September 15, 2013
December 2013	October 15, 2013
January 2014	November 15, 2013

**Tracking and Monitoring**

Designated FRC staff will monitor their office's progress on a monthly basis. Progress reports shall be posted to the **2013 Medi-Cal Reconciliation Project** folder located at <S:\ENTERPRISE\Corrective Action\2013 Medi-Cal Reconciliation Project> as follows:

Reconciled RV Month	Post Progress Report to Corrective Action Folder by:
February 2013	January 15, 2013
March 2013	February 15, 2013
April 2013	March 15, 2013
May 2013	April 15, 2013
June 2013	May 15, 2013
July 2013	June 17, 2013
August 2013	July 15, 2013
September 2013	August 15, 2013
October 2013	September 16, 2013

November 2013	October 15, 2013
December 2013	November 15, 2013
January 2014	December 15, 2013

The **MC RV Reconciliation Report** will be updated monthly and posted on SharePoint ([Management Reports HOME > MR Reports> Medi-Cal RV Reports> MC RV Reconciliation Reports](#))

**Note:** FRCs may address months ahead of schedule, but not later. Late changes will impede CalWIN RRR batch functionality.

**Reconciliation Examples**

The following are possible scenarios staff may encounter during the reconciliation process:

**Scenario #1 - Reestablishing the correct RV due month after the CalWIN RRR Batch job has run for that month**

A Medi-Cal case has a RV due month of 05/2013. Upon review of the case on 3/6/2013, the worker determines that the correct RV due month is 04/2013.

**Issue:**

CalWIN already generated the April RV forms on 02/15/13.

**Solution:**

Follow the reconciliation steps below:

Step	Action
1	Use <a href="#">How To 431 - How To Auto Generate Medi-Cal RRR Forms</a> to: <ul style="list-style-type: none"> <li>Edit the RV due date to 04/2013</li> <li>Auto generate the MC RV forms preserving the barcode functionality</li> </ul>
2	Mail the RV packet timely
3	Enter case comments

**Scenario #2 - Reestablishing the correct RV due month when the correct RV due month is a current or past month**

A Medi-Cal case has a RV due month of 05/2013. Upon review of the case on **03/6/2013**, the worker determines that the correct RV due month is 03/2013.

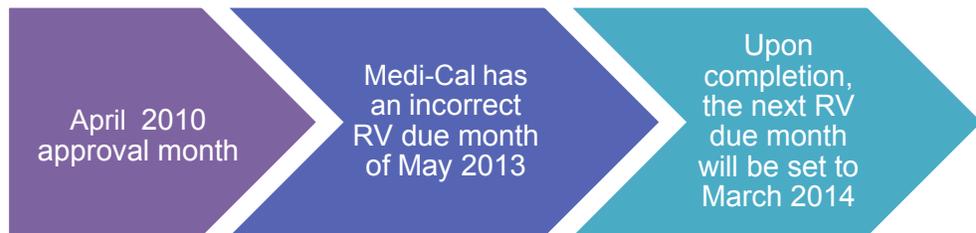
**Issue:**

The RV is due in the current month (03/2013), but is set to 05/2013.

**Solution:**

Follow the reconciliation steps below:

Step	Action						
1	Determine if RV forms were already auto generated.						
	<table border="1"><thead><tr><th>If the RV forms were ...</th><th>Then ...</th></tr></thead><tbody><tr><td>auto generated</td><td><ul style="list-style-type: none"><li>do not edit the RV due date</li><li>mail the RV forms that were auto generated</li><li>set the RV due date to the correct month of 03/2014 when RV is processed</li></ul></td></tr><tr><td>not auto generated</td><td><ul style="list-style-type: none"><li>Use <a href="#">How To 431</a> to:<ul style="list-style-type: none"><li>edit the RV due date to 04/2013, allowing the client 20 days to complete and return the forms</li><li>auto generate the MC RV forms preserving the barcode functionality.</li></ul></li><li>set the RV due date to the correct month of 03/2014 when RV is processed</li></ul></td></tr></tbody></table>	If the RV forms were ...	Then ...	auto generated	<ul style="list-style-type: none"><li>do not edit the RV due date</li><li>mail the RV forms that were auto generated</li><li>set the RV due date to the correct month of 03/2014 when RV is processed</li></ul>	not auto generated	<ul style="list-style-type: none"><li>Use <a href="#">How To 431</a> to:<ul style="list-style-type: none"><li>edit the RV due date to 04/2013, allowing the client 20 days to complete and return the forms</li><li>auto generate the MC RV forms preserving the barcode functionality.</li></ul></li><li>set the RV due date to the correct month of 03/2014 when RV is processed</li></ul>
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2	Enter case comments						



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**Scenario #3: Deemed Eligible (DE) cases**

Deemed Eligibility regulations protect the infant from discontinuance when all other MFBU members are discontinued from Medi-Cal for noncooperation with the RV process. The DE infant remains the only eligible person in the existing case until the end of the month in which he/she turns one year of age, as long as he/she resides in California.

A review of the **MC RV Reconciliation Report** shows the following:

- A Medi-Cal Application Date of September 8, 2010
- A RV due date of January 2013
  - A review of the case record shows a DE infant who turns one on January 4, 2013



The DE infant remains the only eligible person in the Medi-Cal case with a January 2013 RV due date.

In this scenario the RV due date is correct and will be marked as such on the **MC RV Reconciliation Report** under the *Review Findings* column.

**How is the next Annual Redetermination date set?**

**A:** When the infant turns one year old, a redetermination of eligibility for all other Medi-Cal programs must be completed for the infant. Once the RV is completed the next RV due month will be set as follows:




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**Scenario #4 - Reestablishing the correct RV due month when the RV is processed late**

A Medi-Cal case with an RV due date of 01/31/2013 is processed late in 05/2013. Upon completion of the RV:

<b>Step</b>	<b>Action</b>
1	Set the RV due date to 01/2014.
2	Enter case comments

