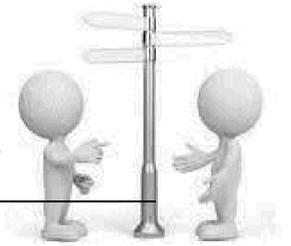


# Processing Guide – Single Point Entry (SPE) Referrals



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## B. Purpose

To provide step-by-step instructions to process Single Point Entry (SPE) referrals. SPE referrals may include any of the following forms:

- Healthy Families Applications MC 321HFP
- Health-e- App

- Add a Person FM 067
- Annual Eligibility Review (AER) FM 063
- Review and Continued Enrollment FM 101
- Re-enrollment FM 058
- Program Review FM 021
- Healthy Families Program (HFP) Follow-Up FM 057
- Premium Re-evaluation FM 150
- MC 363 Medi-Cal to Healthy Families Referrals returned to the county due to the end of the HFP.

This Processing Guide includes processing instructions for all SPE referral forms listed above.

**C. Definitions**

Process	Definition
10-day applications	These are SPE referrals for children that are not granted AE, CHDP or active on Medi-Cal and the SPE transmittal form indicates no missing information as seen below.

HEALTHY FAMILIES MEDI-CAL FOR FAMILIES For Your Family's Health

Application forwarded to CWD

County: San Diego CWD Office Date Original Application Forwarded to CWD:

Case Control Number	Date Received	Date Referred	Opt out of HFP	Unlisted Member Wants Medi-Cal	Retro MC Requested	Any Member Disabled	1931(b)/CalWORKs Recipient	1931(b) Program	Deemed Eligible	Missing Info	Type
			N	N	N	N	N	N	N	N	SPE

Process	Definition
1931b evaluation	These are SPE referrals for children who have been screened and determined potentially eligible to 1931b. The SPE transmittal form shows a "Y" in the 1931b box.

HEALTHY FAMILIES MEDI-CAL FOR FAMILIES For Your Family's Health

Application forwarded to CWD

County: San Diego CWD Office Date Original Application Forwarded to CWD:

Case Control Number	Date Received	Date Referred	Opt out of HFP	Unlisted Member Wants Medi-Cal	Retro MC Requested	Any Member Disabled	1931(b)/CalWORKs Recipient	1931(b) Program	Deemed Eligible	Missing Info	Type
			N	N	N	N	N	N	N	N	SPE

**D. Electronic Application Process Overview**

DPC will process new applications from SPE transferred to the county through the CalWIN Search for External Referral Data window. SPE will continue to send all other referrals to DPC via the existing paper process.

**Electronic Method**

- New SPE applications active on accelerated enrollment.
- New SPE applications not active on accelerated enrollment (possible 10-day applications).

**Paper Method**

- AER forms when HFP completes the AERs and children are found eligible to Medi-Cal.
- Additional application material sent to counties after initial application.
- AERs for the HFP Transition.

NOTE: Recipient data exists in the Search for External Referral Data window in CalWIN for all 5C/5D children, however DPC workers will not process the 5C/5D AERs via the Search for External Referral Data window as the actual AER forms will be sent to the DPC via the paper process. These referrals have the application source “Healthy Families”.

**E.  
DPC  
APP/REG  
instructions  
for Electronic  
Applications  
Received via  
eIAT**

Applications with and without accelerated enrollment will transfer to the County via the External Referral Data window. DPC workers will check the Search for External Referral Data window queue daily for applications with the application source “Single Point of Entry” and process the referrals as specified below:

<b>Step</b>	<b>Action</b>	
1	Clear referral:	
	<b>If the child is ...</b>	<b>Then the worker will...</b>
	known to an active CalWIN case	scan documents to case, narrate and take no further action.
2	not known to CalWIN or known on a closed case	go to Step 2
	Determine the date of application as follows:	
	<b>If the SPE referral...</b>	<b>Then the date of application is the date it was...</b>
	includes a transmittal and it is associated with an AER	referred to the County (found on the transmittal)
	includes a transmittal but	received by SPE (found on

	there is no associated AER	the transmittal)																	
	does not include a transmittal	received by the County																	
3	<p>APP/REG the referral.</p> <p><b>Application Source</b></p> <p>DPC workers cannot choose application sources for the applications received via eIAT. They will be coded by SPE as one of the following:</p> <table border="1"> <thead> <tr> <th>Application status</th> <th>Application Source in CalWIN</th> <th>Application Type in CalWIN</th> </tr> </thead> <tbody> <tr> <td>Active on Accelerated Enrollment</td> <td>Single Point of Entry</td> <td>Enrolled</td> </tr> <tr> <td>Not Active on AE and potentially a 10-day application</td> <td>Single Point of Entry</td> <td>Regular</td> </tr> </tbody> </table> <p><b>Choose the Application Type</b></p> <p>DPC workers can change the application type at application/registration. Review the referral cover sheet:</p> <table border="1"> <thead> <tr> <th>If the referral is ...</th> <th>Select application Type ...</th> </tr> </thead> <tbody> <tr> <td>granted AE CHDP Gateway</td> <td>Enrolled</td> </tr> <tr> <td>subject to 10-day processing as outlined in definitions above</td> <td>Regular</td> </tr> <tr> <td>Incomplete as indicated on the SPE referral form.</td> <td>SPE NOT 10-Day</td> </tr> </tbody> </table>		Application status	Application Source in CalWIN	Application Type in CalWIN	Active on Accelerated Enrollment	Single Point of Entry	Enrolled	Not Active on AE and potentially a 10-day application	Single Point of Entry	Regular	If the referral is ...	Select application Type ...	granted AE CHDP Gateway	Enrolled	subject to 10-day processing as outlined in definitions above	Regular	Incomplete as indicated on the SPE referral form.	SPE NOT 10-Day
Application status	Application Source in CalWIN	Application Type in CalWIN																	
Active on Accelerated Enrollment	Single Point of Entry	Enrolled																	
Not Active on AE and potentially a 10-day application	Single Point of Entry	Regular																	
If the referral is ...	Select application Type ...																		
granted AE CHDP Gateway	Enrolled																		
subject to 10-day processing as outlined in definitions above	Regular																		
Incomplete as indicated on the SPE referral form.	SPE NOT 10-Day																		
4	Transfer attached documents from the External Referral window to DORES.																		
5	Assign case as follows:																		
	<b>If the</b>	<b>Then assign to ...</b>																	

	<b>applications is...</b>	
	subject to 10-day processing	specialized 10-day processing caseload
	not subject to 10-day processing	FRC based on zip code using current procedures

**F.  
DPC Process  
for AERs  
received via  
the eIAT.**

Since the electronic file does not include documents, workers must APP/REG them via the process in H below.

**G.  
DPC  
APP/REG  
Process for:  
Healthy  
Families  
Application  
MC 321 HFP  
Not on eIAT**

In the event that SPE fails to follow the appropriate electronic process for transmitting new applications, workers must utilize the paper process as below:

SPE referrals forms:

- Healthy Families Application MC 321HFP
- Healthy-e-App

The forms listed above must be processed as specified below:

<b>Step</b>	<b>Action</b>	
1	Register SPE Referral in SPE Referral Manual Log	
2	Clear referral	
	<b>If the child is ...</b>	<b>Then the worker will...</b>
	known to an active CalWIN case	image the SPE referral to the appropriate case as an application
	not known to CalWIN or known on a closed case	go to Step 3
3	Determine the date of application as follows:	
	<b>If the SPE referral...</b>	<b>Then the date of application is the date it was...</b>
	includes a transmittal and it is associated with an AER	referred to the County (found on the transmittal)
	includes a transmittal but there is no associated	received by SPE (found on the transmittal)

	AER	
	does not include a transmittal	received by the County
4	APP/REG using the following application source:	
	<b>If the application is ...</b>	<b>Use application source and Type ...</b>
	granted AE CHDP Gateway Cases	Single Point of Entry and Application Type Enrolled
	subject to 10-day processing as outlined in definitions above	Single Point of Entry and Application Type Regular
	not subject to 10-day processing (for example incomplete referrals)	SPE NOT 10-Day
5	Assign case as follows:	
	<b>If the application is...</b>	<b>Then assign to ...</b>
	subject to 10-day processing	specialized 10-day bank
	not subject to 10- day processing	FRC based on zip code using current procedures

H.  
DPC  
APP/REG  
Process for:  
FM 067  
FM 063  
FM 101  
FM 058  
FM 021  
FM 057  
FM 150  
MC 363  
Change  
Documents

SPE referrals forms:

- Add a Person FM 067
- AER FM 063
- Review and Continued Enrollment FM 101
- Re-enrollment FM 058
- Program Review FM 021
- Healthy Families Program Follow Up FM 057
- Premium Re-evaluation FM 150
- MC 363
- Change documents sent to SPE for transition children

Must be processed as specified below:

Step	Action
1	Register SPE Referral in SPE Referral Manual Log

2	<p>Clear referral</p> <table border="1"> <thead> <tr> <th data-bbox="570 268 930 306">If the child is ...</th> <th data-bbox="930 268 1399 306">Then the worker will...</th> </tr> </thead> <tbody> <tr> <td data-bbox="570 306 930 457">known to an active CalWIN case</td> <td data-bbox="930 306 1399 457">image the SPE referral and documents to the case as a change, narrate and take no further action.</td> </tr> <tr> <td data-bbox="570 457 930 562">not known to CalWIN or known on a closed case</td> <td data-bbox="930 457 1399 562">go to Step 3</td> </tr> </tbody> </table>	If the child is ...	Then the worker will...	known to an active CalWIN case	image the SPE referral and documents to the case as a change, narrate and take no further action.	not known to CalWIN or known on a closed case	go to Step 3		
If the child is ...	Then the worker will...								
known to an active CalWIN case	image the SPE referral and documents to the case as a change, narrate and take no further action.								
not known to CalWIN or known on a closed case	go to Step 3								
3	<p>Review contents of SPE referral:</p> <table border="1"> <thead> <tr> <th data-bbox="570 678 906 716">If the referral ...</th> <th data-bbox="906 678 1399 716">Then the worker will...</th> </tr> </thead> <tbody> <tr> <td data-bbox="570 716 906 793">includes a recent application/AER form</td> <td data-bbox="906 716 1399 793">go to Step 4</td> </tr> <tr> <td data-bbox="570 793 906 947">does not include a recent application/AER form</td> <td data-bbox="906 793 1399 947"> <ul style="list-style-type: none"> <li>• contact MAXIMUS at (916) 673-4602 and request the last application/AER be faxed</li> <li>• when received go to Step 4</li> </ul> </td> </tr> </tbody> </table>	If the referral ...	Then the worker will...	includes a recent application/AER form	go to Step 4	does not include a recent application/AER form	<ul style="list-style-type: none"> <li>• contact MAXIMUS at (916) 673-4602 and request the last application/AER be faxed</li> <li>• when received go to Step 4</li> </ul>		
If the referral ...	Then the worker will...								
includes a recent application/AER form	go to Step 4								
does not include a recent application/AER form	<ul style="list-style-type: none"> <li>• contact MAXIMUS at (916) 673-4602 and request the last application/AER be faxed</li> <li>• when received go to Step 4</li> </ul>								
4	<p>Determine the date of application as follows:</p> <table border="1"> <thead> <tr> <th data-bbox="570 1056 979 1171">If the SPE referral...</th> <th data-bbox="979 1056 1399 1171">Then the date of application is the date it was...</th> </tr> </thead> <tbody> <tr> <td data-bbox="570 1171 979 1249">includes any of the forms listed above</td> <td data-bbox="979 1171 1399 1249">referred to the County (found on the transmittal)</td> </tr> <tr> <td data-bbox="570 1249 979 1327">does not include a transmittal</td> <td data-bbox="979 1249 1399 1327">received by the County</td> </tr> <tr> <td data-bbox="570 1327 979 1404">Was received between 1/1/14 and 3/1/14</td> <td data-bbox="979 1327 1399 1404">follow the process indicated in <a href="#">section R below</a></td> </tr> </tbody> </table>	If the SPE referral...	Then the date of application is the date it was...	includes any of the forms listed above	referred to the County (found on the transmittal)	does not include a transmittal	received by the County	Was received between 1/1/14 and 3/1/14	follow the process indicated in <a href="#">section R below</a>
If the SPE referral...	Then the date of application is the date it was...								
includes any of the forms listed above	referred to the County (found on the transmittal)								
does not include a transmittal	received by the County								
Was received between 1/1/14 and 3/1/14	follow the process indicated in <a href="#">section R below</a>								
5	<p>APP/REG using the following application source:</p> <table border="1"> <thead> <tr> <th data-bbox="570 1507 1060 1585">If the form is ...</th> <th data-bbox="1060 1507 1399 1585">Use application source ...</th> </tr> </thead> <tbody> <tr> <td data-bbox="570 1585 1060 1663">an AER Form for a child active on the transition codes 5C/5D</td> <td data-bbox="1060 1585 1399 1663">SPE – RRR</td> </tr> <tr> <td data-bbox="570 1663 1060 1740">any other form or an AER not associated with a 5C/5D child</td> <td data-bbox="1060 1663 1399 1740">SPE – MISC</td> </tr> </tbody> </table>	If the form is ...	Use application source ...	an AER Form for a child active on the transition codes 5C/5D	SPE – RRR	any other form or an AER not associated with a 5C/5D child	SPE – MISC		
If the form is ...	Use application source ...								
an AER Form for a child active on the transition codes 5C/5D	SPE – RRR								
any other form or an AER not associated with a 5C/5D child	SPE – MISC								
6	<p>Check the Search for External Referral Data window for the referral. If a “Healthy Families” application source referral exists in the window, mark it as duplicate.</p>								

7	Assign case to FRC based on zip code using current procedures.	
	<b>If the form is...</b>	<b>Then assign to ...</b>
	an AER form for a child active on the transition codes 5C/5D	specialized AER caseload by FRC zip code
any other form or an AER not associated with a 5C/5D child	FRC based on zip code using current procedures	

I.  
**ACCESS  
Change/  
Termination  
Request for  
5C/5D  
Individuals**

Reported changes and termination requests made for HFP children who are in a transitional 5C/5D aid code must be processed as follows:

Step	Action						
1	Clear MEDS to confirm that the 5C/5D Aid Code is active.						
2	Clear the beneficiary information: <table border="1" data-bbox="565 976 1398 1869"> <thead> <tr> <th>If the child is ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>known to an active CalWIN case</td> <td> <ul style="list-style-type: none"> <li>Send a SharePoint to the FRC with the change or termination information.</li> <li>For termination requests send the written termination request form MC 215 to the client with a DPC return address.</li> </ul> </td> </tr> <tr> <td>not known to CalWIN or known on a closed case</td> <td> <ul style="list-style-type: none"> <li>Complete the mail in application half sheet (AXS 001) for the family including the Healthy Families Member number if available.</li> <li>Email the AXS 001 to DPC at <a href="mailto:SPE.HHSA@sdcounty.ca.gov">SPE.HHSA@sdcounty.ca.gov</a> with the subject line <b>SPE Change Request</b>.</li> <li>Call SPE at (916) 673-4602 and request the last application or AER to be faxed to DPC.</li> <li>For termination requests send the written termination request form</li> </ul> </td> </tr> </tbody> </table>	If the child is ...	Then ...	known to an active CalWIN case	<ul style="list-style-type: none"> <li>Send a SharePoint to the FRC with the change or termination information.</li> <li>For termination requests send the written termination request form MC 215 to the client with a DPC return address.</li> </ul>	not known to CalWIN or known on a closed case	<ul style="list-style-type: none"> <li>Complete the mail in application half sheet (AXS 001) for the family including the Healthy Families Member number if available.</li> <li>Email the AXS 001 to DPC at <a href="mailto:SPE.HHSA@sdcounty.ca.gov">SPE.HHSA@sdcounty.ca.gov</a> with the subject line <b>SPE Change Request</b>.</li> <li>Call SPE at (916) 673-4602 and request the last application or AER to be faxed to DPC.</li> <li>For termination requests send the written termination request form</li> </ul>
If the child is ...	Then ...						
known to an active CalWIN case	<ul style="list-style-type: none"> <li>Send a SharePoint to the FRC with the change or termination information.</li> <li>For termination requests send the written termination request form MC 215 to the client with a DPC return address.</li> </ul>						
not known to CalWIN or known on a closed case	<ul style="list-style-type: none"> <li>Complete the mail in application half sheet (AXS 001) for the family including the Healthy Families Member number if available.</li> <li>Email the AXS 001 to DPC at <a href="mailto:SPE.HHSA@sdcounty.ca.gov">SPE.HHSA@sdcounty.ca.gov</a> with the subject line <b>SPE Change Request</b>.</li> <li>Call SPE at (916) 673-4602 and request the last application or AER to be faxed to DPC.</li> <li>For termination requests send the written termination request form</li> </ul>						

		MC 215 to the client with a DPC return address.
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**J.  
DPC  
APP/REG  
Instruction for  
ACCESS  
Changes and  
Terminations**

Emails received from ACCESS for reported changes and termination requests for HF children who are in a transitional 5C/5D aid code will be processed as follows:

Step	Action
1	Follow up with MAXIMUS to locate and scan last application or AER for case. Upon receipt go to Step 2.
2	APP/REG as follows: <ul style="list-style-type: none"> <li>• use application source SPE-Misc</li> <li>• date of application will be the date the half sheet is received by DPC</li> </ul>
3	Assign case to appropriate FRC based on zip code using current procedures.

**K.  
FRC SPE 10-  
Day  
Application  
Process**

FRC staff must monitor SPE Application Report and the SPE 10-Day Bank daily to ensure timely processing of SPE referrals. SPE applications identified for 10-day processing must be reviewed and processed as follows:

Step	Action						
1	Review the application to ensure that it is complete and without client error as defined <a href="#">4.20.02.E</a> . <table border="1" data-bbox="570 1352 1403 1507"> <thead> <tr> <th>If the application is...</th> <th>Then the worker will...</th> </tr> </thead> <tbody> <tr> <td>complete as defined in <a href="#">4.20.02.E</a></td> <td>grant/deny within 10 days</td> </tr> <tr> <td><b>NOT</b> complete</td> <td>go to Step 2</td> </tr> </tbody> </table>	If the application is...	Then the worker will...	complete as defined in <a href="#">4.20.02.E</a>	grant/deny within 10 days	<b>NOT</b> complete	go to Step 2
If the application is...	Then the worker will...						
complete as defined in <a href="#">4.20.02.E</a>	grant/deny within 10 days						
<b>NOT</b> complete	go to Step 2						
2	Issue VCL requesting outstanding verifications.						
3	Enter the case comment "SPE 10-day received incomplete".						
4	Enter the special indicator "Incomplete SPE 10-Day Application" in the special indicator field.						
5	Move case from the SPE 10-Day Bank to appropriate caseload.						
6	Complete eligibility determination within the timeframes.						

**NOTE:** If the DPC sends a case to the incorrect FRC specialized caseload, that FRC must complete that eligibility determination.

**Case Documents are Available in the External Referral Data Window.**

There may be a delay between the time DPC assigns a case and when the documents are attached in DORES. If there are no documents attached to the case in DORES, workers may search for the electronic referral documents using the source ID written in the case comments in the External Referral Data window in CalWIN and process the application based on those documents.

**L.  
FRC SPE (Not  
10-Day)  
Application  
Process**

Upon receipt of an SPE (not 10-day) application, FRC staff must:

Step	Action
1	Review application
2	Complete the Data Collection in CalWIN
3	Issue VCL for any outstanding verifications
4	Complete initial intake case comments
5	Assign to appropriate caseload for follow-up actions

**NOTE:** Subject to 45-day processing requirements.

**M.  
FRC Changes  
Reported for  
5C/5D  
Individuals**

Changes reported for individuals on a 5C/5D must be processed as follows:

Step	Action						
1	Clear individual:						
	<table border="1"> <thead> <tr> <th>If the CalWIN case is ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Pending</td> <td>Go to Step 2</td> </tr> <tr> <td>Active</td> <td>Go to Step 3</td> </tr> </tbody> </table>	If the CalWIN case is ...	Then ...	Pending	Go to Step 2	Active	Go to Step 3
	If the CalWIN case is ...	Then ...					
	Pending	Go to Step 2					
Active	Go to Step 3						
2	Complete the Data Collection in CalWIN						
3	Review change request						
	<table border="1"> <thead> <tr> <th>If additional information is ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>not needed</td> <td>Process the change accordingly</td> </tr> <tr> <td>needed</td> <td>Issue VCL for any outstanding verifications and assign to appropriate staff for follow-up</td> </tr> </tbody> </table>	If additional information is ...	Then ...	not needed	Process the change accordingly	needed	Issue VCL for any outstanding verifications and assign to appropriate staff for follow-up
	If additional information is ...	Then ...					
	not needed	Process the change accordingly					
needed	Issue VCL for any outstanding verifications and assign to appropriate staff for follow-up						

4	Complete initial intake case comments including all actions taken.
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**NOTE:** For changes reported directly to an FRC for individuals without an active CalWIN case, follow the procedures above in part [F](#) and [G](#) of this processing guide and then complete steps 2 through 4 above.

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**N.  
FRC  
Termination  
Request for  
5C/5D  
Individuals**

Termination requests for individuals on a 5C/5D must be processed as follows:

Step	Action						
	Clear individual: <table border="1" style="margin-left: 20px;"> <thead> <tr> <th style="text-align: center;">If the CalWIN case is ...</th> <th style="text-align: center;">Then ...</th> </tr> </thead> <tbody> <tr> <td>pending</td> <td>go to Step 2</td> </tr> <tr> <td>active</td> <td>follow current termination process</td> </tr> </tbody> </table>	If the CalWIN case is ...	Then ...	pending	go to Step 2	active	follow current termination process
If the CalWIN case is ...	Then ...						
pending	go to Step 2						
active	follow current termination process						
2	Deny application by completing the Collect Withdraw/Deny/Cancel/Terminate Program Detail window in CalWIN.						
3	Issue withdrawal NOA.						
4	Enter Case Comments.						

**NOTE:** For termination request made directly to an FRC for individuals without an active CalWIN case, follow the procedures in part [I](#) and [J](#) of this processing guide and then complete steps 2 through 4 above.

---

**O.  
FRC Process  
for MC 363  
forms**

As part of the HFP to Medi-Cal transition, some referrals to HFP for children with a Medi-Cal SOC (form MC 363) were not evaluated by the HFP. When FRCs receive these forms from DPC they must take the following actions:

Step	Action
1	Review application.
2	Evaluate the children referred to HFP for TLICP effective 1/1/13 and ongoing.

---

**P.  
SPE  
Application  
for Unborns**

The HFP SPE application must be APP/REG'd for the adult applying for the unborn child. The unborn cannot be added to CalWIN.

HFP SPE application for an unborn must be processed as described in

[How To 434.](#)

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**Q.  
Closing 5C  
and 5D in  
MEDS**

5C and 5D aid codes can only be shut down in MEDS by the Department of Health Care Services unless a full-scope Medi-Cal aid code is granted or the case is closing for the following termination reasons:

- Application Withdrawn
- Out of State
- Loss of Contact
- No Residence
- SSI/SSP Eligibility
- Receiving Benefits in another State

If workers evaluate a case and find that the child is eligible to an aid code that is not full-scope or is closing for a reason other than those listed above, workers must:

Step	Action
1	Complete the CalWIN determination.
2	Forward case information including participant CIN to the county MEDS coordinator via email to request coordinator to open a MEDS ticket to terminate the 5C or 5D aid code.

**NOTE:** Children active on 5C and 5D aid codes are eligible to CEC until the [end of their AER month](#).

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**R.  
Temporary  
DPC  
APP/REG  
process for  
AERs  
received  
1/1/14 through  
3/31/14**

The AERs (HF/FM 063) received from SPE prior to 3/31/14 must be processed using Pre-ACA rules in CalWIN. The Pre-ACA rules will not trigger properly in CalWIN if the application date is after 12/31/13. When processing AERS received at DPC via SPE between 1/1/14 and 3/31/14, DPC workers must:

Step	Action
1	Follow steps 1-3 under <a href="#">section H</a> above.
2	Enter 12/31/13 as the application date.
3	Complete steps 5-7 under <a href="#">section H</a> above.

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**S.  
Temporary  
FRC**

Most AERs (HF/FM 063) received 1/1/14 through 3/31/14 were APP/REG'd based on the referral date on the SPE transmittal form. In order to process AERs using Pre-ACA Medi-Cal rules, the application

**Procedures for AERs received at DPC after 1/1/14**

date cannot be after 12/31/13. When processing the AERs received at DPC between 1/1/14 and 3/31/14, workers must:

Step	Action								
1	View the application date.								
	<table border="1"> <thead> <tr> <th>If the application date is...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Between 1/1/14 and 3/31/14</td> <td>Cancel the application and continue to step 2.</td> </tr> <tr> <td>Prior to 1/1/14</td> <td>Continue to step 4.</td> </tr> <tr> <td>After 3/31/14</td> <td>Request the RFTHI form and complete a MAGI Medi-Cal determination. Stop here.</td> </tr> </tbody> </table>	If the application date is...	Then ...	Between 1/1/14 and 3/31/14	Cancel the application and continue to step 2.	Prior to 1/1/14	Continue to step 4.	After 3/31/14	Request the RFTHI form and complete a MAGI Medi-Cal determination. Stop here.
	If the application date is...	Then ...							
	Between 1/1/14 and 3/31/14	Cancel the application and continue to step 2.							
Prior to 1/1/14	Continue to step 4.								
After 3/31/14	Request the RFTHI form and complete a MAGI Medi-Cal determination. Stop here.								
2	Re-APP/REG the case with a 12/31/13 application date.								
3	<p>Evaluate the children for Medi-Cal for the AER form month and ongoing.</p> <p>Enter prior aid for all application months prior to the AER form month (for example, if the form and verifications are for February 2014, enter prior eligibility for December and January) on the Individual Demographics screen under the Prior Aid tab.</p>								
4	Complete the Medi-Cal determination using pre-ACA Medi-Cal rules.								
	<table border="1"> <thead> <tr> <th>If..</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>The children are eligible to Pre-ACA Medi-Cal with no SOC</td> <td>Authorize Send NOA Narrate</td> </tr> <tr> <td>The children are found ineligible to pre-ACA Medi-Cal or Eligible to Medi-Cal with a SOC</td> <td>Evaluate for MAGI Medi-Cal from the date the county received the AER form forward.</td> </tr> </tbody> </table>	If..	Then...	The children are eligible to Pre-ACA Medi-Cal with no SOC	Authorize Send NOA Narrate	The children are found ineligible to pre-ACA Medi-Cal or Eligible to Medi-Cal with a SOC	Evaluate for MAGI Medi-Cal from the date the county received the AER form forward.		
	If..	Then...							
The children are eligible to Pre-ACA Medi-Cal with no SOC	Authorize Send NOA Narrate								
The children are found ineligible to pre-ACA Medi-Cal or Eligible to Medi-Cal with a SOC	Evaluate for MAGI Medi-Cal from the date the county received the AER form forward.								

**T. Discontinuing Individuals Who Fail to Complete the AER**

Workers must follow the below procedure when families fail to return their manual AER packet to the county by the first of the RV due month:

Step	Action
1	Review the monthly list of transition children and determine which families have not turned in their AER (the AER has

	not been APP/REG'd at DPC).						
2	<p>Contact the beneficiary by phone to request the RV packet and give them 10 days to provide.</p> <table border="1"> <thead> <tr> <th>If the worker ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Makes phone contact</td> <td>Request the RV packet with a 10-day deadline. <b>Reminder</b> the Beneficiary may provide the RFTHI information over the phone.</td> </tr> <tr> <td>Does not make phone contact</td> <td>Send the MC 355 requesting the RFTHI RV Packet with 10-day deadline.</td> </tr> </tbody> </table>	If the worker ...	Then ...	Makes phone contact	Request the RV packet with a 10-day deadline. <b>Reminder</b> the Beneficiary may provide the RFTHI information over the phone.	Does not make phone contact	Send the MC 355 requesting the RFTHI RV Packet with 10-day deadline.
If the worker ...	Then ...						
Makes phone contact	Request the RV packet with a 10-day deadline. <b>Reminder</b> the Beneficiary may provide the RFTHI information over the phone.						
Does not make phone contact	Send the MC 355 requesting the RFTHI RV Packet with 10-day deadline.						
3	<p>Review the case at the 10-day deadline.</p> <table border="1"> <thead> <tr> <th>If the information...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Was received</td> <td>Process the RV</td> </tr> <tr> <td>Was not received</td> <td> <ul style="list-style-type: none"> <li>• APP/REG the AER using the client data from the manual AER list with the first of the AER due month as the application date.</li> <li>• Deny the application with the reason "Applicant failed to complete the necessary paperwork".</li> <li>• Manually generate MC-239 A Discontinuance notice and select the reason code DAS001 – Non-Compliance with the Redetermination Process.</li> </ul> </td> </tr> </tbody> </table>	If the information...	Then ...	Was received	Process the RV	Was not received	<ul style="list-style-type: none"> <li>• APP/REG the AER using the client data from the manual AER list with the first of the AER due month as the application date.</li> <li>• Deny the application with the reason "Applicant failed to complete the necessary paperwork".</li> <li>• Manually generate MC-239 A Discontinuance notice and select the reason code DAS001 – Non-Compliance with the Redetermination Process.</li> </ul>
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Was received	Process the RV						
Was not received	<ul style="list-style-type: none"> <li>• APP/REG the AER using the client data from the manual AER list with the first of the AER due month as the application date.</li> <li>• Deny the application with the reason "Applicant failed to complete the necessary paperwork".</li> <li>• Manually generate MC-239 A Discontinuance notice and select the reason code DAS001 – Non-Compliance with the Redetermination Process.</li> </ul>						
4	Narrate actions.						