

Processing Guide 10 – Health Care Reform (HCR)

Table of Contents

• Purpose
• FRC Application Processing
– Intake Process
– HCR Banks
– MAGI/APTC Evaluation Process
• CalHEERS Call Center
– Quick-Sort Transfers
– Courtesy Applications
– Health Plan Selection
– Processing Center

Purpose

To provide instructions for handling applications received during the interim period of October 1, 2013 to December 31, 2013.

Refer to [Special Notice 13-09 Health Care Reform \(HCR\) Medi-Cal and Low Income Health Program \(LIHP\)](#) for information on HCR requirements.

FRC Application Processing

Intake Process

Staff will evaluate all Medi-Cal applications, including the new Single Streamlined Application and SAWS 2 Plus following current Medi-Cal/LIHP rules and order of evaluation.

Step	Action						
1	Process application in CalWIN.						
2	<p>If additional verifications are needed to complete the application process, include the appropriate supplemental form as part of the Verification Check List.</p> <table border="1"> <thead> <tr> <th>If Application is the...</th> <th>Then request the...</th> </tr> </thead> <tbody> <tr> <td>MC 210</td> <td> RFTHI <ul style="list-style-type: none"> This form is required to evaluate for MAGI/APTC if there is no eligibility to current Medi-Cal. </td> </tr> <tr> <td>Single Streamlined Application</td> <td>MC 210 ACA</td> </tr> </tbody> </table>	If Application is the...	Then request the...	MC 210	RFTHI <ul style="list-style-type: none"> This form is required to evaluate for MAGI/APTC if there is no eligibility to current Medi-Cal. 	Single Streamlined Application	MC 210 ACA
If Application is the...	Then request the...						
MC 210	RFTHI <ul style="list-style-type: none"> This form is required to evaluate for MAGI/APTC if there is no eligibility to current Medi-Cal. 						
Single Streamlined Application	MC 210 ACA						

		<ul style="list-style-type: none"> • This from is required to evaluate for current Medi-Cal
3	Follow established processing timeframes for the pending verifications.	
	If ...	Then follow current business process to...
	customer does not comply with application process	<ul style="list-style-type: none"> • deny Medi-Cal/LIHP
	all individuals are determined eligible for Medi-Cal (with or without SOC) or LIHP	<ul style="list-style-type: none"> • approve in CalWIN/AuthMed
	some individuals are eligible for Medi-Cal, while others are potentially MAGI/APTC eligible (Mixed Household)	<ul style="list-style-type: none"> • approve MC/LIHP in CalWIN/AuthMed • Proceed to MAGI/APTC Evaluation Process section
	customer is over property, or fails to provide property verifications, but is potentially eligible to MAGI/APTC	<ul style="list-style-type: none"> • deny Medi-Cal/LIHP • Proceed to MAGI/APTC Evaluation Process section

HCR Banks

Two new caseload banks were created for assignment and monitoring of active (mixed household) cases and denied Medi-Cal cases that require a MAGI/APTC evaluation in CalHEERS. FRCs will be responsible for monitoring the following caseload banks:

Office	Active Medi-Cal Case Bank	Denied Medi-Cal Case Bank
Centre City FRC	CBKG	CBKX
El Cajon FRC	LBKG	LBKX
HCAD	QBKG	QBKX
Lemon Grove FRC	GBKG	GBKX
Metro FRC	ABKG	ABKX
North Central	HBKG	HBKX
North Coastal FRC	KBKG	KBKX
Northeast FRC	NBKG	NBKX
North Inland FRC	EBKG	EBKX
North Inland Fallbrook	EFKG	EFKX

North Inland Ramona	ERKG	ERKX
Southeast	SBKG	SBKX
South Region	VBKG	VBKX

MAGI/APTC Evaluation Process

FRC staff will follow the steps outlined below for individuals that are determined ineligible to Medi-Cal, but are potentially eligible to MAGI/APTC:

Step	Action
1	<p>Prior to assigning the case to the HCR Bank, staff must ensure that the case meets the following criteria:</p> <ul style="list-style-type: none"> • RFTHI was returned • Residency was verified • Citizenship/LPR status is verified • SSN is verified • Verified Income is at or below 138% of the FPL (MAGI), or between 139% to 400% FPL (APTC) <p>NOTE: Desk Aid 51 - HCR Bank Checklist, available in MPG Article B, may be used to ensure above criteria is met.</p>
2	Assign to the Denied or Active HCR Bank as appropriate.
3	Designated staff will clear the HCR Banks and assign case to designated HSS for processing in CalHEERS.
4	MAGI/APTC eligible individuals must be processed and enrolled in CalHEERS by 12/15/13 in order for their health plan to become effective 01/01/14.

CalHEERS Call Center

Quick Sort Transfers

CalHEERS Call Center agents will process quick sort transfers as follows:

NOTE: [Desk Aid 55 - CalHEERS Call Center Flow Chart](#) is available in MPG Article B.

Step	Action
1	<p>Determine the caller's county of residence (COR).</p> <ul style="list-style-type: none"> • Refer to the Courtesy Application section for non-COR transfers.

2	Inform customer of information that will be needed and possible call duration.						
	<table border="1"> <thead> <tr> <th>If ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>customer cannot proceed with phone interview</td> <td> provide other application access channels <ul style="list-style-type: none"> • On-Line • In-Person • Call Back • Mail-In </td> </tr> <tr> <td>customer wishes to proceed with phone interview</td> <td>use screening tool to determine entry system (CalWIN or CalHEERS)</td> </tr> </tbody> </table>	If ...	Then ...	customer cannot proceed with phone interview	provide other application access channels <ul style="list-style-type: none"> • On-Line • In-Person • Call Back • Mail-In 	customer wishes to proceed with phone interview	use screening tool to determine entry system (CalWIN or CalHEERS)
If ...	Then ...						
customer cannot proceed with phone interview	provide other application access channels <ul style="list-style-type: none"> • On-Line • In-Person • Call Back • Mail-In 						
customer wishes to proceed with phone interview	use screening tool to determine entry system (CalWIN or CalHEERS)						
3	Complete case clearance.						
4	Complete entries in CalWIN or CalHEERS.						
5	Issue Verification Check List for required verifications needed.						
6	Assign case to the Processing Center Caseload Bank for follow-up on pending cases.						

Courtesy Applications

Courtesy applications for non-COR transfers will be processed as follows:

Step	Action						
1	Determine the caller's county of residence (COR).						
2	Inform customer of information that will be needed and possible call duration. <table border="1"> <thead> <tr> <th>If ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>customer cannot proceed with phone interview</td> <td> provide other application access channels <ul style="list-style-type: none"> • On-Line • In-Person (COR) • Phone (COR direct number) </td> </tr> <tr> <td>customer wishes to proceed with phone interview</td> <td> <ul style="list-style-type: none"> • use screening tool to determine entry system • proceed to step 4 </td> </tr> </tbody> </table>	If ...	Then ...	customer cannot proceed with phone interview	provide other application access channels <ul style="list-style-type: none"> • On-Line • In-Person (COR) • Phone (COR direct number) 	customer wishes to proceed with phone interview	<ul style="list-style-type: none"> • use screening tool to determine entry system • proceed to step 4
If ...	Then ...						
customer cannot proceed with phone interview	provide other application access channels <ul style="list-style-type: none"> • On-Line • In-Person (COR) • Phone (COR direct number) 						
customer wishes to proceed with phone interview	<ul style="list-style-type: none"> • use screening tool to determine entry system • proceed to step 4 						
3	Complete case clearance.						

4	Determine entry system (CalHEERS or County's On-line Application Website)	
	If ...	Then ...
	customer is MAGI/APTC	process in CalHEERS
	customer requests Medi-Cal (MC) benefits now	Process an electronic referral in the home county's on-line application system. <ul style="list-style-type: none"> • Go to WWW.benefits cal.com • Select home county from dropdown • Log in as a Community Based Organization (CBO) user
customer requests CalFresh and/or CalWORKs	If ...	Then ...
	MAGI/APTC was processed in CalHEERS	send a CF/CW referral to the home county via CalHEERS
	MC was not processed in CalHEERS	Process CF/CW referral via on-line application system

Health Plan Selection

Health Plan selection for APTC will be done in CalHEERS. For MAGI eligible customers, plan selection will be done through Health Care Options, following the current business process.

Processing Center

Processing Center supervisors will monitor caseload banks and assign cases to staff for the following:

- Follow-up on pending applications taken at the CalHEERS Call Center
- CalFresh evaluations for applicants that applied through the CalHEERS Call Center
- Customer call back requests