

**COUNTY OF LOS ANGELES
DEPARTMENT OF PUBLIC SOCIAL SERVICES
BUREAU OF HUMAN RESOURCES**



**MEDI-CAL PROGRAM
WORKBOOK**



TABLE OF CONTENTS

DAY 3

- ❖ **WORKSHOP #1**
 - INQM
- ❖ **WORKSHOP #2**
 - County ID
- ❖ **WORKSHOP #3**
 - CIN Referral

DAY 6

- ❖ **WORKSHOP #4**
 - MAGI Household Size
- ❖ **WORKSHOP #5**
 - Covered California Household Size
- ❖ **WORKSHOP #6**
 - Countable income

DAY 8

- ❖ **WORKSHOP #7**
 - Net Non-Exempt Income

DAY 9

- ❖ **WORKSHOP #8**
 - Mixed Household Eligibility

DAY 11

- ❖ **WORKSHOP #9**
 - Minor Consent

DAY 12

- ❖ **WORKSHOP #10**
 - Renewal Dates



WORKSHOP #1

Review the sample INQM screen below and answer the questions on the following page.

```
INQM          ** PRIMARY MEDI-CAL/CMSP INFORMATION **      ### - 01/05/23
                                     11:04:10
CASE-NAME DAISY DUCK          DISTRICT 08          DUCK          , DONALD
COUNTY-ID 19-M1-LAXXXXX-1-02  EW-CODE ABCD
MEDS-ID XXX-XX-XXXX  SSN-VER A  RV-COMP 09-2019  1313 DISNEYLAND DR
BIRTHDATE 01-02-1989  DOB-VER S  SEX M GOV-RSP 1  ANAHEIM 92802      CA 90044
CHAINED-ID          LAST-MC/CP-CHG 07-07-20  ADDRESS-FLAG W  RES-COUNTY 30
PRIOR-MEDS-ID          LAST-OTH-CHG 12-02-19  APDP  PICKLE  RECOVERY
WELFARE-PGM 005  DEATH-DT          DEATH-CD  TERM-DT  TERM-REAS
CIN 9XXXXXXXD 6  MBI          BIC-ISSUE 09-16-16  PAPER-ISSUE
PGM:  M C H 1(MEDICR) C H 2(IH/PCS) C H 3          FS C H CW
                                     2022=====>
COUNTY  19  PEND  JAN  FEB  MAR  APR  MAY  JUN  JUL  AUG  SEP  OCT  NOV  DEC
AID-CODE  M1          M1  M1  M1  M1  M1          M1
ELIG-STAT 301        301 301 301 301 301          301
SOC-AMT
CERT-DAY
OHC      K          K  K  K  F  F  F  F
RESTRICT
MEDICARE 322        322 322 322 322 322 322 322
HCPl-NUM 304        304 304 304 304 304 304 304
HCPl-STAT 01        01  01  01  01  01  01  01
OPTION  <F13=VALID OPTIONS> F3=SUMMARY; F7=BACK; F8=FORWARD; ENTER=LIST
```



Questions

1. Is there an address flag? _____
2. What is the aid code in the current month? _____
3. Is the client eligible in the current month? _____
4. Is there eligibility in the pending segment? _____
5. What was the aid code in December of 2022? _____
6. Was eligibility established for any of the last 12 months? _____
If so, which months? _____
7. What is the SSN Verification code? _____, and what does it mean? _____
8. Was this person known by a prior MEDS ID number? _____
9. Who is the responsible county? _____
10. Who does the case record belong to? _____
11. Who is the Primary Applicant on the case? _____
12. Does this person currently have other health care coverage? _____
13. What managed health care plan number is this person enrolled in? _____
14. How would we view Special Programs INQ1 screen? _____
15. Does this person have current eligibility on any of the Special Program Summary Screens? _____

**WORKSHOP #2**

Using the information provided construct each beneficiaries County ID, for the purposes of each scenario the FBU will be 1.

1. Freddy Krueger has an approved case with Los Angeles County. There are three members within his household, 2 US born citizens including himself, and 1 who is undocumented. His case number is A123456. The Case Summary is the following:

Case Member	Eligibility Aid Code	Person ID
Freddy Krueger	M1	1
Jason Voorhees	M2	3
Michael Myers	M3	2

Create the county ID for each individual:

Freddy _____

Jason _____

Michael _____

2. Tiffany Valentine is currently pregnant by her husband Charles Lee Ray. They have an approved case in San Bernardino County. There are three members in the household (unborn is counted). Both Tiffany and her husband are US born citizens. Their case number is B987650. The case summary is following:

Case Member	Eligibility Aid Code	Person ID
Tiffany Valentine	M7	1
Charles Lee Ray	X1	2
Unborn	?	?

Create the county ID for each individual:

Tiffany _____

Charles _____

Unborn _____



WORKSHOP #3

Scenario:

May Parker was born on August 31, 2023, to Peter Parker and Mary Jane Watson at Olive View Medical Center in Sylmar, CA. Mary Jane Watson called in to report the birth of her child on September 17, 2023. The EW added May Parker to the case by selecting add new client index number (CIN). May Parker had previously been updated on MEDS by hospital staff as her mother was a Medi-Cal beneficiary at the time of birth. This resulted in May having duplicate CINs and eligibility on MEDS.

To correct the error, please complete the CIN referral using the following information:

Case Name: Mary Jane Watson

Case Number: SPI93R0

Case Member: May Parker

Social Security Number: 123456789

CIN #1: 0987654321A

CIN #2: 123478901B

**CIN REFERRAL**

TO: CIN CORRECTION UNIT

Email: CINReferral@dpss.lacounty.gov

Completed by CCU : _____ Date: _____

From: _____ Date: _____

Phone number : _____ Dist.: _____

MEDS Liaison : _____

☐ ATTACH VERIFICATION WHEN NOT AVAILABLE IN EDMS☐ JOURNAL ENTRY (mandatory)**REFERRAL REASON****MANDATORY: Please describe CIN problem in journal**

Check appropriate box below

☐ MULTIPLE CINS☐ CIN OVERLAY (individuals share same CIN In MEDS)☐ SFIS-FINGER PRINT☐ CIN on SYSTEM and MEDS are different☐ DUPLICATE MEDS-ID sharing the SAME CIN☐ OTHER REASON:**CASE/PERSON INFORMATION**

CASE NAME: _____

CASE NUMBER: _____

NAME LAST: _____

FIRST: _____

INITIAL: _____

BIRTHDATE: ____ / ____ / ____

MEDS - ID: ____ - ____ - ____

CIN: _____

CIN: _____

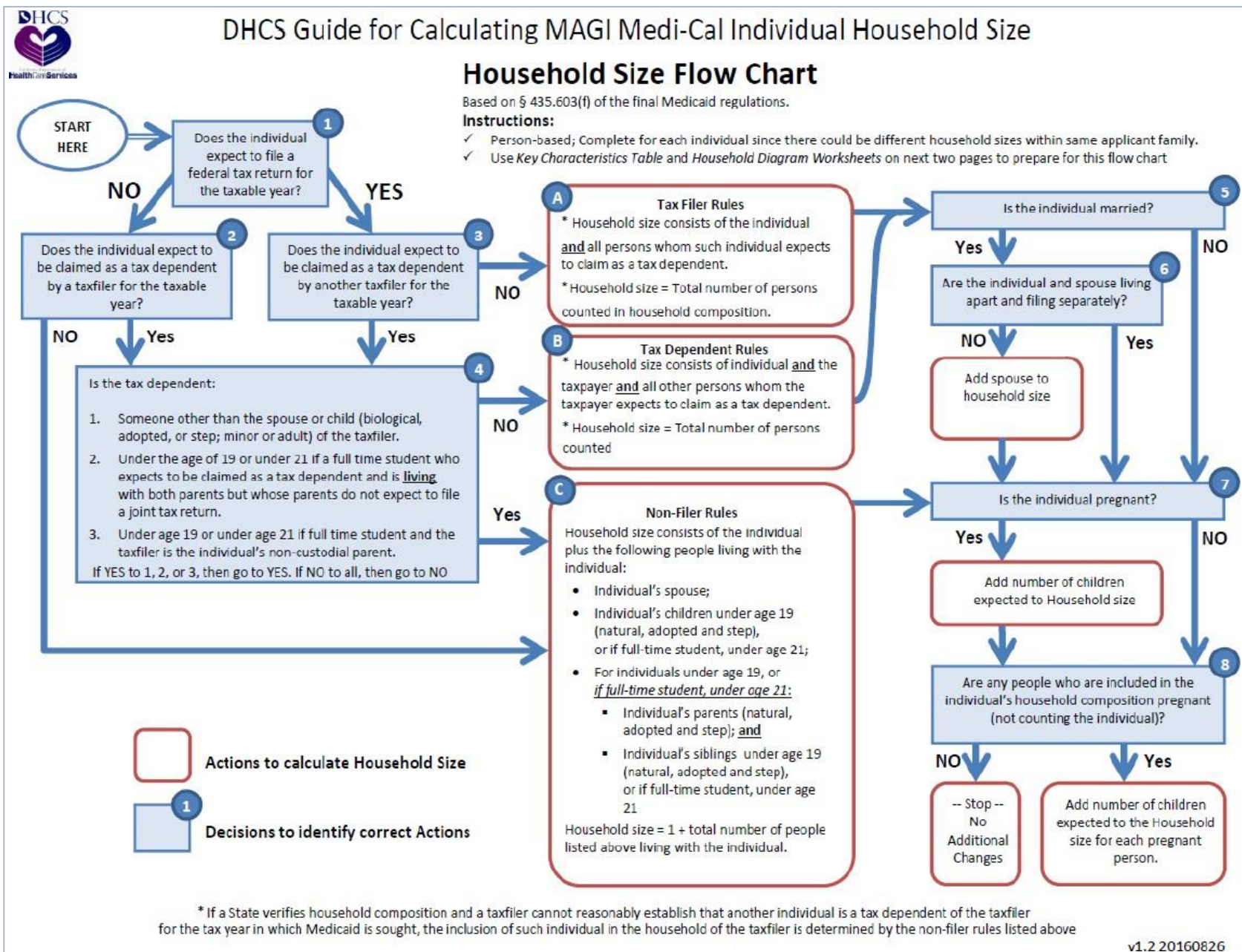
CIN: _____

List ALL names known to this person (aka, maiden, etc...):

SENDER'S COMMENTS

Include additional CINs in this section.

CCU RESPONSE/COMMENTS



**WORKSHOP #4**

For the scenarios below, place a check mark for those individuals from the “Counted in HH” column that are to be counted for the “Who” individual. Then count all check mark marks in the row associated to the “Who” individual to determine the “MAGI HH Size” for said individual.

Scenario 1 – Single Individual

Freddy is a 22-year-old, single individual who lives alone and files taxes as Single. He is not claimed as a tax dependent and has no dependents.

For example, in Scenario 1 “Counted in HH” (Freddy) is counted for the “Who” (Freddy). Freddy’s MAGI HH Size is 1.

Who	Counted in HH	MAGI HH Size
	Freddy	
Freddy	✓	1

Scenario 2 – Married Couple Filing Jointly with Common Children

The Clay family consists of Paul and Linda (married), and their two children, Rose and David. Mom and dad file a joint tax return and claim both children as dependents. The tax HH consists of:

Who	Counted in HH				MAGI Size
	Paul	Linda	Rose	David	
Paul					
Linda					
Rose					
David					

**Scenario 3 – Married Couple Filing Separately with Common Children**

The Stone family consists of Michael and Sarah (married), and their two children Mary and John. Mom and dad file taxes separately. Dad claims both children as dependents. Mom does not claim anyone as dependents. The tax HH consists of:

Who	Counted in HH				MAGI HH Size
	Michael	Sarah	Mary	John	
Michael					
Sarah					
Mary					
John					

Scenario 4 – Unmarried Couple with Children

Kent and Julie are not married and file taxes separately. They live together with their two children, Mary and Josh. Kent and Julie both have income. Kent claims the children as tax dependents. The tax HH consists of:

Who	Counted in HH				MAGI HH Size
	Kent	Julie	Mary	Josh	
Kent					
Julie					
Mary					
Josh					

Scenario 5 – Unmarried Couple – Pregnant

Paul and Michelle are not married. They live together, and Michelle is pregnant with twins. Paul and Michelle file taxes as Single and do not claim anyone as a dependent. The tax HH consists of:

Who	Counted in HH				MAGI HH Size
	Michelle	Unborn Child 1	Unborn Child 2	Paul	
Michelle					
Paul					

**Scenario 6 – Child Claimed by Non-Custodial Parent**

Claire lives with her son Anthony and files taxes as a single individual. Non-custodial dad claims Anthony as a tax dependent. Claire is applying for health benefits for herself and her son.

Who	Counted in HH		MAGI HH Size
	Claire	Anthony	
Claire			
Anthony			

Scenario 7 – Three Generation HH

Amy lives with her 7-year-old daughter, Melissa, and her 50-year-old mother, Clara. Amy supports her daughter and her mother. Amy is the tax filer and claims her daughter and mother as dependents. Amy is applying for health benefits for herself, her daughter, and Grandma Clara. The tax HH consist of:

Who	Counted in HH			MAGI HH Size
	Amy	Melissa	Clara	
Amy				
Melissa				
Clara				

NOTE: When processing three generation cases in which the grandparent(s) are Non-MAGI MC eligible, he/she needs to be set-up in a separate MC block for CalSAWS to correctly evaluate her/him for Non-MAGI MC.

**WORKSHOP #5****Scenario 1 – Unmarried Couple with Children**

Kent and Julie are not married and file taxes separately. They live together with their two children, Mary and Josh. Kent and Julie both have income. Kent claims the children as tax dependents. The Covered CA HH consists of:

Who	Counted in HH				CoCA HH Size
	Kent	Julie	Mary	Josh	
Kent					
Julie					
Mary					
Josh					

Scenario 2 – Unmarried Couple – Pregnant

Paul and Michelle are not married. They live together, and Michelle is pregnant with twins. Paul and Michelle file taxes as Single and do not claim anyone as a dependent. The Covered CA HH consists of:

Who	Counted in HH				CoCA HH Size
	Michelle	Unborn Child 1	Unborn Child 2	Paul	
Michelle					
Paul					

Scenario 3 – Child Claimed by Non-Custodial Parent

Claire lives with her son Anthony and files taxes as a single individual. Non-custodial dad claims Anthony as a tax dependent. Claire is applying for health benefits for herself and her son.

Who	Counted in HH		CoCA HH Size
	Claire	Anthony	
Claire			
Anthony			

**Scenario 4 – Multi-Generation HH**

Amy lives with her 7-year-old daughter, Melissa, and her 50-year-old mother, Clara. Amy supports her daughter and her mother. Amy is the tax filer and claims her daughter and mother as dependents. Amy is applying for health benefits for herself, her daughter, and Grandma Clara. The tax HH consist of:

Who	Counted in HH			CoCA HH Size
	Amy	Melissa	Clara	
Amy				
Melissa				
Clara				

Scenario 5 – Married Couple Filing Separately with Common Children

The Stone family consists of Michael and Sarah (married), and their two children Mary and John. Mom and dad file taxes separately. Dad claims both children as dependents. Mom does not claim anyone as dependents. The tax HH consists of:

Who	Counted in HH				CoCA HH Size
	Michael	Sarah	Mary	John	
Michael					
Sarah					
Mary					
John					

**WORKSHOP #6**

In this exercise find the income type in the Income & Deductions Desk Guide and write in “yes” or “no” in the box if the income type is countable for MAGI and/or Non-MAGI.

Income Type	Countable	
	MAGI	Non-MAGI
Lottery		
State Disability		
Adoption Assistance Payments		
Child Support Received		
Bribes		
Diversion Cash Assistance		
Whistleblower's Award		
Tips		
Income In-Kind		
GoFundMe		
IHSS		
Nobel Prize		
Bitcoin		
Kickbacks		
401K		
Pulitzer		



WORKSHOP #7

Abraham Simpson (Age 48) is applying for Non-MAGI Medi-Cal. He is currently working part-time at the nuclear plant earning \$1530.00 every other week. He currently pays a health care premium in the amount of \$150.00 per month and court-ordered child support in the amount of 250.00 per month. Please determine Abraham's net non-exempt income.

Ned Flanders (Age 65) is applying for Non-MAGI Medi-Cal. He is currently retired and receives Title II Social Security Benefits in the amount of 786.00 per month. Please determine Mr. Flanders net non-exempt income.



WORKSHOP #8

On the first of this month Wendy Applebee applied for Medi-Cal for herself and her 3 children. She is 36 years old and is employed at JP Morgan Chase Bank as a loan processor. Her monthly gross income is \$4,000. She pays Ms. Johnson \$400 a month for Dependent Care services. All family members were born in California. She files taxes as Head of Household and claims her children as tax dependents. Her children's information is as follows:

- Alice, 13-years old.
- Roger, 7-years old.
- Peter, 3-years old.

The children do not receive child support from their absent parent and are not claimed as tax dependents of the non-custodial parent.

Ms. Applebee has a checking account at Sanwa Bank with \$1500, a savings account of \$300, and a BMW worth \$40,000.

Please answer the following questions regarding Ms. Applebee to determine if she has a SOC:

1. What type of Medi-Cal will Ms. Applebee be evaluated for first? _____
2. What is Ms. Applebee's tax HH size? _____
3. What is Ms. Applebee's gross income? _____
4. What type of Medi-Cal will Ms. Applebee children qualify for? _____
5. What type of Medi-Cal will Ms. Applebee qualify for and why? _____

6. Identify the aid codes for all children? _____
7. What (if any) deductions will Ms. Applebee receive? And if so, what is her net non-exempt income? _____

8. Will property count for Ms. Applebee and if so, is she over the limit? _____

9. What is the maintenance need for Ms. Applebee's HH? _____
10. Is Ms. Applebee's non-exempt above the maintenance need, if so, what is the difference? _____



WORKSHOP #9

MINOR CONSENT

In the following scenarios, determine if the child is eligible for Minor Consent services.

Scenario # 1

Marie is 19 years old and determined to be disabled. She is living with her parents and is not currently enrolled in school. Marie would like to apply for Outpatient Mental Health Services. Is she eligible? Why or why not?

Scenario # 2

Esther would like to apply for family planning. She is 17 years old and would like to get birth control pills. She is living with her parents and does not want her parents to be informed of her application. Is she eligible? Why or why not?

Scenario # 3

Yvonne is 18 years old. She is working full-time and living on her own. She is applying for pregnancy-related care. Is she eligible? Why or why not?

Scenario # 4

Lily is living with her parents. She is 16 and wants to apply for Drug & Alcohol abuse treatment/counseling. Her parents are aware of her application. Is she eligible? Why or why not?



WORKSHOP #10

Tweety Bird applied for Medi-Cal Benefits on March 3, 2023. He was approved for MC benefits with aid code M1. His current RE date is February 2024. On August 6, 2023 he reported a change in income. Please complete the following chart to determine Tweety Bird's RE date.

Current RE Date	Change Reported	Eligibility Determined for Future Month	New RE Date

Charlie Brown applied for Medi-Cal on October 1, 2023. He was approved for MC benefits with aid code 1H. His current RE date in September 2024. On November 3, 2023 Mr. Brown reported he will be moving from Buena Park to Santa Clarita. Please complete the following chart to determine Charlie Brown's RE Date.

Current RE Date	Change Reported	Eligibility Determined for Future Month	New RE Date