## **10.4. Recalculate Initial Eligibility**

10/29/2024 4:35 pm CDT

In the first plan year of the system, to have the system recalculate initial eligibility on a global basis, simply reupload the census, setting "Reset Entry Dates" to yes from within the Census Upload box. Then run the data scrub. Review the "Eligibility Status Report" to confirm that eligibility is correct.

Census Upload	• ×
Currently selected census grid:	Sample Census (comp and comp after elig) (ID: c5debf8)
With Map:	Yes
Reset entry dates:	No 🗸
Select a file:	Browse
Number of rows to ignore:	5
Number of rows containing data:	1 Data must begin in the first column.
	Cancel Uploa

Eligibility should always be correct in the first year of the system so that subsequent years are also correct. There are cases where, in subsequent years in the system, eligibility may need to be recalculated; such as when an amendment has changed eligibility requirements. In these cases, initial eligibility can be recalculated on a global or individual basis by using the "Initial Elig - Recalculate (Yes/No) Upload" tool that is found in Tools/Settings from within the Compliance Menu.

	Compliance Menu
	Census
	Tasks
	<ul> <li>Transactions</li> </ul>
	<ul> <li>Miscellaneous</li> </ul>
Clone	Tools/Settings
Workflow	Plan Specifications
Batch Add Plan Year End	
Print Setting	
Global Participant Search	
Conversion Uploads	
History Uploads	
Initial Elig- Recalculate (Yes/No) Uploa	d
Initial Elig- Recalculate (Yes/No) Upload	x
This upload changes the yes/no settings for participant specified in the file you upload (	yes/no value for each source).
Do not modify the column headers. Must be	csv file.
NOTE: You must re-run the data scrub for a	
Get Current Participants' Toggle Setting	s   Set all to "Yes"   Set all to "No"
Upload file name:	Browse
	Cancel Upload

To have the system recalculate all sources for all participants in the census, click the 'Set all to "Yes" link. This will automatically update every source for every participant to "Yes", recalculate. Close the box, then rerun the data scrub.

To have the system recalculate initial eligibility for only certain sources and/or certain participants, click the "Get Current Participants' Toggle Settings" link, and save this file to your computer. Open the file and change the individual sources/participants to "Yes" for those sources/participants for which you wish the system to recalculate eligibility. Note that leaving these fields blank will have the same effect as entering "No". Upload this file by clicking the "Browse" button from within the "Initial Elig - Recalculate (Yes/No) Upload" window. Close the box, then rerun the data scrub. When the data scrub is now run, eligibility, dates met and entry dates will be recalculated for applicable participants/sources that were selected to be recalculated.

Please note that running the data scrub automatically resets all participant's recalculation fields to "No". Users can also click on the "Set all to 'No" link to change the recalc field for all sources and all participants to "No".