

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-58123 | CIV-10791 – Prevent Advancing  
Medi-Cal Renewal with a Soft Pause Individual

CalSAWS	DOCUMENT APPROVAL HISTORY	
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# 1 OVERVIEW

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Per guidance provided in ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-Modified Adjusted Gross Income (Non-MAGI) Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

This SCR will update The Systems to prevent advancing the Medi-Cal renewal with a Soft Pause individual.

## 1.1 Current Design

When a MAGI Medi-Cal individual reports a change or is reevaluated during the annual renewal period, CalHEERS protects the individual from adverse actions to their MAGI Medi-Cal eligibility by placing the individual in Soft Pause. The annual renewal period begins two months prior to the RE Due Date until the program is renewed.

Soft Pause protects the individual until the County Eligibility Worker (CEW) evaluates the individual for MAGI Medi-Cal with a premium or for other Medi-Cal programs not subject to MAGI, such as Non-MAGI Medi-Cal or Consumer Protection Programs (CPPs).

CalHEERS Soft Pause protections will continue until Soft Pause is lifted by a CEW through an Eligibility Determination Request (EDR). Once Soft Pause is lifted, adverse actions can be applied per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual can be moved to another aid code or discontinued from MAGI Medi-Cal.

With CalHEERS Release 16.4, C-IV SCR 2713 and LRS SCR 36160 updated The Systems with functionality to allow a CEW to send a 'Soft Pause Lift' indicator to CalHEERS in an EDR. When CalHEERS receives the 'Soft Pause Lift' indicator, CalHEERS lifts Soft Pause and applies adverse actions per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual is moved to another aid code or discontinued from MAGI Medi-Cal. CalHEERS sends a MAGI Determination of Eligibility Response (DER) to The Systems with the individual's new MAGI Medi-Cal eligibility/discontinuance and the Eligibility Evaluation Reason code 'Soft Pause Lift'. The CEW can then move the individual to the new MAGI Medi-Cal aid code or evaluate the individual for Non-MAGI Medi-Cal.

C-IV Medi-Cal EDBC Batch skip logic will skip a case with skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause. C-IV generates through batch a Non-MAGI Screening Packet for any individual with Eligibility Evaluation Reason of 'Soft Paused' on the DER received during the Batch MAGI Renewal process. This allows the C-IV CEW to manually request the 'Soft Pause Lift' to determine the individual's correct benefits when the Non-MAGI Screening Packet is returned.

CalSAWS does not have the Medi-Cal Batch EDBC Skip logic nor the batch to generate the Non-MAGI Screening Packet. CalSAWS CA-203981 added the Non-MAGI Screening Packet to the template repository in Release 19.11.

The Systems allow CEWs to run Medi-Cal EDBC against a MAGI Determination that contains an individual in Soft Pause and establish a new annual renewal period. When an individual is in Soft Pause, the MAGI Determination provides the updated income and household size information with incorrect Federal Poverty Level (FPL) limit. As a result, during MAGI Renewals, The Systems generates a MAGI Renewal Notice of Action (NOA) with the incorrect FPL amounts. This can be misleading to the individual.

C-IV allows the CEW to select the 'RE' EDBC Run Reason during the annual renewal period and outside the annual renewal period to establish a new renewal period when processing a reported change. In C-IV 'RE' EDBC Run Reason is displayed when EDBC benefit month is on or after the Re-Evaluation begin month.

CalSAWS allows a worker to select a Run Reason from the EDBC Run Reason dropdown only when running Medi-Cal EDBC for a single-month. In CalSAWS 'RE' EDBC Run Reason is displayed only if the benefit month is after the RE Due Date or if a 'RE' packet exists for the 'RE' Due month.

C-IV sends 'Renewal – manual renewal' (RM) EDR Run Reason to CalHEERS during the annual renewal period starting with the EDR Benefit Month two months prior to the RE Due Date and beyond.

For example: A Medi-Cal program has RE Due Date 06/30/2020.

Beginning with EDR benefit month 05/2020 and beyond, C-IV sends 'RM' EDR Run Reason until a new annual renewal period is established.

CalSAWS does not send 'RM' EDR Run Reason.

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the next RE period begin date and there is a valid open RE record for the program or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'
- The Non-MAGI Turning 65 Packet submit month equals the Medi-Cal EDBC benefit month and the latest Non-MAGI Turning 65 Packet status is 'Reviewed - Ready to Run EDBC' if there does not exist any Medi-Cal RE packet for the RE due month for the program in Release 19.11 with CA-203981.

C-IV does not have functionality to automatically set the EDBC Run Reason to 'RE', but C-IV does have a page validation on the Run EDBC and Negative Action Detail pages that require the worker to run EDBC with 'RE' Run Reason when all the following are true:

- The latest MAGI determination for the benefit month has a 'RE' or 'RM' Run Reason.
- The benefit month is no earlier than one month prior to 'RE' due month.
- 'RE' Run Reason was not selected while running EDBC.
- Not an Auto Test scenario.

Note: The Medical Packet information from DOC\_TEMPL table

The MAGI Emulator allows testing of changes to The Systems that rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment. The MAGI Emulator does not have functionality to return Soft Pause or Soft Pause Lift in the MAGI Determination. See the current functionality of MAGI Emulator in Supporting Documents.

## 1.2 Requests

Per ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-MAGI Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

1. Require the CEW to lift Soft Pause prior to running Medi-Cal EDBC with 'RE' EDBC Run Reason.
2. Add a new EDBC Run Reason 'Soft Pause/Non-RE', that will allow a CEW to run Medi-Cal EDBC during the annual renewal period with an individual in Soft Pause that will not advance the renewal due date. This 'Soft Pause/Non-RE' EDBC Run Reason should only be used for exceptions when the CEW is unable to lift Soft Pause due to 10-day noticing or CalHEERS issues. For example: a 'Person Add' during renewal or to process a Negative Action for a non-Soft Pause individual while waiting for the Non-MAGI Screening Packet for the Soft Pause individual. This EDBC Run Reason can also be leveraged for a 'Non-RE' in a situation without anyone in Soft Pause when a CEW needs to run EDBC during the annual renewal, but does not want to advance the RE. For example: Transitioning an individual that falls into the Young Adult Expansion (YAE) population while the worker is still waiting for verifications to complete the RE. The CEW can run EDBC with 'Soft Pause/Non-RE' EDBC Run Reason to process the transition of the YAE individual, but the RE will not be advanced at that time.
3. Update CalSAWS Batch EDBC Skip logic to skip a case with a new skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause.
4. Update The Systems to generate a Non-MAGI Screening Packet when an individual is skipped through batch for Soft Pause and the MAGI Determination Run Reason code is 'Renewal - batch administrative renewal' (RE).



5. Update CalSAWS to create a Journal entry when the Non-MAGI Screening Packet is generated through batch.
6. Update CalSAWS to allow the CEW to select 'RE' EDBC Run Reason to establish a new renewal period during reported changes outside the annual renewal period.
7. Update CalSAWS to send 'RM' EDR Run Reason during the annual renewal period.
8. Update The Systems to automatically set the EDBC Run Reason to either 'RE' or 'Soft Pause/Non-RE' when appropriate during the annual renewal period.
9. Update the MAGI Emulator to have Soft Pause and Soft Pause Lift functionality to allow the testing of changes in The Systems which rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment.

### 1.3 Overview of Recommendations

1. Update the Run EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program ~~to prevent a CEW from advancing the renewal when an individual is Soft Paused.~~
2. Update the Negative Action Detail page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program ~~to prevent a CEW from advancing the renewal when an individual is Soft Paused.~~
3. Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.
4. Update the Medi-Cal EDBC Summary page to display a notification message when 'Soft Pause/Non-RE' Run Reason is auto-set during the Medi-Cal EDBC evaluation.
5. Add 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program. Update The Systems to auto-set the EDBC Run Reason to either 'Soft Pause/Non-RE' or 'RE' when appropriate.
6. Update eHIT Disposition functionality for the new EDBC Run Reason 'Soft Pause/Non-RE'. **CalSAWS only:** Update eHIT logic to have 'RM' EDR Run Reason functionality.
7. **CalSAWS only:** Add a Batch EDBC Skip Reason 'Soft Paused' that will skip a case from Batch EDBC processing when the valid DER has at least one individual with Eligibility Evaluation Reason of Soft Pause.
8. **CalSAWS only:** Update the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal manually (RM) from the online page.
9. Create a new batch job for CalSAWS and update the existing batch job for C-IV to only generate the Non-MAGI Screening packet through batch for cases which are skipped during Batch EDBC with the reason of Soft Pause. **CalSAWS only:** Add a journal entry when the Non-MAGI Screening packet is generated through batch.
10. Update the MAGI Emulator to return MAGI Determinations with Soft Pause and Soft Pause Lift. The MAGI Emulator is used for testing purposes only to emulate the results returned from CalHEERS on a MAGI Determination.

11. Regression test the DHCS Renewals Master Request reports for the updated manual renewal EDR run reason functionality.

#### **1.4 Assumptions**

- None of these changes apply to CMSP.
- There are no changes to the functionality that determines or updates the Medi-Cal RE period Begin and Due Date with this SCR.
- There are no changes to the functionality that updates the status of a Packet from 'Reviewed – Ready to Run EDBC' to 'Complete' with this SCR.

## 2 RECOMMENDATIONS

### 2.1 Run EDBC page

#### 2.1.1 Overview

Update the Run EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.

#### 2.1.2 Run EDBC Page Mockup

**Run EDBC**

\*- Indicates required fields

Run EDBC Cancel

Benefit Month: \*

10/2019

Program	Status	Timely Notice Exception	Reason	Run Reason
<input type="checkbox"/> Medi-Cal	Active			RE Soft Pause/Non-RE TMC 176 S TMC 176 S/RE

This Type 1 page took 4.07 seconds to load.

Figure 2.1.2.1 – Run EDBC Page (C-IV)

**Run EDBC**

\*- Indicates required fields

Change Reason Run EDBC Cancel

Benefit Processing Range:

Begin Month: \* End Month: \*

01/2020 01/2020

Program	Status	Timely Notice Exception	Reason	Run Reason
<input type="checkbox"/> Medi-Cal	Active			RE Soft Pause/Non-RE

Change Reason Run EDBC Cancel

Figure 2.1.2.2 – Run EDBC Page (CalSAWS)

### 2.1.3 Description of Changes

1. **CalSAWS only:** Update CalSAWS to display 'RE' EDBC Run Reason in the Run Reason drop down for the Medi-Cal program when the EDBC benefit month is on or after the current RE begin month.
2. Display 'Soft Pause/Non-RE' in the EDBC Run Reason drop down for the Medi-Cal program when the valid MAGI Determination for the benefit month has at least one individual on the program with Eligibility Evaluation Reason of Soft Pause.

### 2.1.4 Page Location

**Global:** Eligibility

**Local:** Customer Information

**Task:** Run EDBC

### 2.1.5 Security Updates

None

### 2.1.6 Page Mapping

No change

### 2.1.7 Page Usage/Data Volume Impacts

No change

## 2.2 Negative Action Detail page

### 2.2.1 Overview

Update the Negative Action Detail page to display 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.

### 2.2.2 Negative Action Detail Page Mockup

**Negative Action Detail**

\*- Indicates required fields Run EDBC

Benefit Month: \*  
01/2020

**Medi-Cal** ■ Run EDBC for this program

<input type="checkbox"/> Person	SSN	Date of Birth
<input type="checkbox"/> Person One		01/28/1962
<input type="checkbox"/> Person Two		10/26/1958
<input type="checkbox"/> Person Three		08/10/2011

Negative Action Reason:

**Run Reason:**

- RE
- Soft Pause/Non-RE
- TMC 176 S
- TMC 176 S/RE

Run EDBC

Figure 2.2.2.1 – Negative Action Detail Page (C-IV)

**Negative Action Detail**

\*- Indicates required fields Run EDBC

Benefit Month: \*  
11/2019

**Medi-Cal** ■ Run EDBC for this program

<input type="checkbox"/> Person	Date of Birth
<input type="checkbox"/> Childone One	01/15/1996
<input type="checkbox"/> Person One	02/10/1994

Negative Action Reason:

**Run Reason:**

- RE
- Soft Pause/Non-RE

Run EDBC

Figure 2.2.2.2 – Negative Action Detail Page (CalSAWS)

### 2.2.3 Description of Changes

1. **CalSAWS only:** Update CalSAWS to display 'RE' EDBC Run Reason in the Run Reason drop down for the Medi-Cal program when the EDBC benefit month is on or after the current Re-Evaluation begin month.
2. Display 'Soft Pause/Non-RE' in the Run Reason drop down for the Medi-Cal program when the valid MAGI Determination for the benefit month has at least one individual on the program with Eligibility Evaluation Reason of Soft Pause.

### 2.2.4 Page Location

**Global:** Eligibility

**Local:** Case Summary

**Task:** Negative Action Detail

### 2.2.5 Security Updates

None

### 2.2.6 Page Mapping

No change

### 2.2.7 Page Usage/Data Volume Impacts

No change

## 2.3 Create Manual EDBC page

### 2.3.1 Overview

Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.

### 2.3.2 Create Manual EDBC Mockup

The screenshot shows the 'Create Manual EDBC' page for the Medi-Cal program. At the top, there are buttons for 'Create Manual EDBC' and 'Cancel'. Below these are two required fields: 'Benefit Month' (set to 09/2019) and 'Manual EDBC Reason'. A table below has columns for 'Program', 'Status', and 'Run Reason'. The 'Run Reason' dropdown is highlighted with a red box, showing a list of options: 'RE', 'Soft Pause/Non-RE', 'TMC 176 S', and 'TMC 176 S/RE'. At the bottom right, there are buttons for 'Create Manual EDBC' and 'Cancel'.

Figure 2.3.2.1 – Create Manual EDBC Page (C-IV)

The screenshot shows the 'Create Manual EDBC' page for the Medi-Cal program. At the top, there are buttons for 'Create Manual EDBC' and 'Cancel'. Below these are two required fields: 'Benefit Month' (set to 01/2020) and 'Manual EDBC Reason'. A table below has columns for 'Program', 'Status', and 'Run Reason'. The 'Run Reason' dropdown is highlighted with a red box, showing a list of options: 'RE' and 'Soft Pause/Non-RE'. At the bottom right, there are buttons for 'Create Manual EDBC' and 'Cancel'.

Figure 2.3.2.2 – Create Manual EDBC (CalSAWS)

### 2.3.3 Description of Changes

1. Display 'Soft Pause/Non-RE' in the Run Reason drop down for the Medi-Cal program on Create Manual EDBC page.

### 2.3.4 Page Location

**Global:** Eligibility  
**Local:** Customer Information  
**Task:** Create Manual EDBC

### 2.3.5 Security Updates

None

### 2.3.6 Page Mapping

No change

### 2.3.7 Page Usage/Data Volume Impacts

No change

## 2.4 Medi-Cal EDBC Summary page

### 2.4.1 Overview

Update the Medi-Cal EDBC Summary page to display a notification message when 'Soft Pause/Non-RE' Run Reason is auto-set during the Medi-Cal EDBC evaluation.

### 2.4.2 Medi-Cal EDBC Summary Page Mockup

The screenshot shows the 'Medi-Cal EDBC Summary' page. At the top, there is a notification message: 'EDBC was run with Soft Pause/Non-RE and RE will not be advanced.' Below the notification are 'Accept' and 'Cancel' buttons. A table displays EDBC run details:

Begin Month	End Month	Run Date	Run Status	Accepted By
11/2019	11/2019	10/07/2019	Not Accepted	

Below the table is the 'EDBC Information' section:

**EDBC Run Reason:** Soft Pause/Non-RE

**Type:** Read Only      **Type Reason:** Pending Eligible MAGI Renewal

**Recalculation:** No

**MAGI-Only Mode:** Yes

Figure 2.4.2.1 – Medi-Cal EDBC Summary Page

### 2.4.3 Description of Changes

1. Update the Medi-Cal EDBC Summary page to display a notification message, "EDBC was run with Soft Pause/Non-RE Run Reason and RE will not be advanced." when The Systems auto-sets the Run Reason to 'Soft Pause/Non-RE' during EDBC evaluation. (See section 2.5.2.3 for auto-set EDBC Run Reason criteria.)
2. **C-IV only:** Remove the page validation "Cancel – EDBC must be run with RE Run Reason to complete the redetermination." on Medi-Cal EDBC Summary page that requires the worker to cancel the EDBC and run EDBC with 'RE' Run Reason.



#### 2.4.4 Page Location

**Global:** Eligibility

**Local:** Customer Information

**Task:** Medi-Cal EDBC Summary

#### 2.4.5 Security Updates

None

#### 2.4.6 Page Mapping

No change

#### 2.4.7 Page Usage/Data Volume Impacts

No change

### 2.5 Medi-Cal EDBC Rules

#### 2.5.1 Overview

Add 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program. Update The Systems to auto-set the EDBC Run Reason to either 'Soft Pause/Non-RE' or 'RE' when appropriate.

#### 2.5.2 Description of Change

1. Add a new EDBC Run Reason 'Soft Pause/Non-RE' (CT\_744) for the Medi-Cal program.  
**Note:** EDBC will not advance the RE Due Date when run with 'Soft Pause/Non-RE' EDBC Run Reason.
2. Update The Systems to auto-set the EDBC Run Reason to 'RE' during EDBC evaluation when the following conditions are met:
  - A. Non-MAGI Medi-Cal only (Appropriate Non-MAGI Medi-Cal RE Packets \*)**
    - a. The program selected is Medi-Cal
    - b. All active members on the Medi-Cal program have a Non-MAGI aid code (excluding TMC/CE/CMSP) in the latest 'Accepted' and 'Saved' regular EDBC that's effective for the benefit month being processed.
    - c. The EDBC Run Reason is not specified by the worker or batch
    - d. The benefit month is equal to:
      - i. the month following the RE Due Date
      - or
      - ii. the come-up month

- e. The appropriate Non-MAGI Medi-Cal RE packet's submit month is for the month of the RE Due Date for the Medi-Cal program. (See Table 2.5.2.2.A)
  - i. The latest status of the MC RE Packet is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'. If more than one MC RE Packet exists for the same Medi-Cal program and same submit month, the latest status of at least one MC RE Packet is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'.
- f. Not an auto-test scenario

C-IV	CalSAWS
Aged, Blind, Disabled (ABD) Medi-Cal Redetermination Packet	ABD MC RE Packet
Regular Medi-Cal/ ABD RE Packet (Signature packet)	MC RE Packet
Regular Medi-Cal Redetermination Packet	LTC MC RE Packet
LTC RE Packet (Signature Packet)	MC 604 IPS Packet
Long Term Care (LTC) Medi-Cal Redetermination Packet	Non-MAGI Screening Packet
Non-MAGI Screening Packet	MSP Packet

**Table 2.5.2.2.A – Appropriate Non-MAGI Medi-Cal RE Packets**

**B. Non-MAGI Medi-Cal (Non-MAGI Turning 65 Packet)**

a. **C-IV Only:** Update the Auto-set RE logic to run Medi-Cal with 'RE' EDBC Run Reason if all the following are true:

- i. The Non-MAGI Turning 65 Packet submit month:
  - 1. Equals the Medi-Cal EDBC benefit month or
  - 2. Is prior to the Medi-Cal EDBC benefit month and the Medi-Cal EDBC benefit month is come-up month.
- ii. The latest Non-MAGI Turning 65 Packet status is 'Reviewed- Ready to Run EDBC'.
- iii. The latest Non-MAGI Turning 65 Packet submit month is on or after RE begin month.
- iv. There does not exist any Medi-Cal RE Packet for the RE due month for the program.
  - If there exists any Medi-Cal RE Packet for the RE due month for the program, follow the auto-setting RE logic per Recommendation 2.5.2.2.A

- b. **LRS/CalSAWS Only:** The current Auto-set RE logic in LRS/CalSAWS aligns with the recommendations above for C-IV with the exception of 2.5.2.2.B.a.i.2.
  - i. Expand the Auto-set RE logic to also run Medi-Cal with 'RE' EDBC Run Reason if the Non-MAGI Turning 65 Packet submit month is prior to the Medi-Cal EDBC benefit month and the Medi-Cal EDBC benefit month is come-up month.

**C. Mixed MAGI/Non-MAGI Medi-Cal (Appropriate Mixed MAGI/Non-MAGI Medi-Cal RE Packets \*)**

- a. The program selected is Medi-Cal
- b. At least one active member on the Medi-Cal program has a MAGI Medi-Cal aid code and at least one active member has a Non-MAGI Medi-Cal aid code (excluding TMC/CE/CMSP) in the latest 'Accepted' and 'Saved' regular EDBC that's effective for the benefit month being processed.
- c. The EDBC Run Reason is not specified by the worker or batch
- d. The benefit month is equal to:
  - i. the month following the RE Due Date
  - or
  - ii. the come-up month
- e. The appropriate Mixed MAGI/Non-MAGI Medi-Cal RE packet exists for the month of the RE Due Date for the program.
- f. The appropriate mixed MAGI/Non-MAGI Medi-Cal RE packet's submit month is for the month of the RE Due Date for the Medi-Cal program. (See Table 2.5.2.2.B)
  - i. The latest status of the MC RE Packet is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'. If more than one MC RE Packet exists for the same Medi-Cal program and same submit month, the latest status of at least one MC RE Packet is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'.
- g. The valid DER to be used by EDBC for this Medi-Cal program has 'RE' or 'RM' Run Reason and an accepted and saved regular EDBC was not run for this DER.
  - i. **CalSAWS only:** Because CalSAWS did not have functionality to send 'RM' Run Reason to CalHEERS until the release of this SCR, add an exception for CalSAWS to allow 'CO' Run Reason (in addition to 'RE' and 'RM') for four benefit months after the release of this SCR. After which, the exception to include 'CO' will expire and the EDBC Run Reason will only be auto-set for DERs with 'RE' or 'RM' Run Reason.
- h. The valid DER for the benefit month does not contain any Soft Pause individual

- i. Not an auto-test scenario

C-IV	CalSAWS
Aged, Blind, Disabled (ABD) Medi-Cal Redetermination Packet	ABD MC RE Packet
MAGI and Non-MAGI Redetermination Packet	Mixed MC RE Packet
Regular Medi-Cal/ ABD RE Packet (Signature packet)	LTC MC RE Packet
Regular Medi-Cal Redetermination Packet	MC RE Packet
LTC Mixed Household RE Packet (Signature Packet)	MC 604 IPS Packet
LTC RE Packet (Signature Packet)	Non-MAGI Screening Packet
Long Term Care (LTC) Medi-Cal Redetermination Packet	MSP Packet
Non-MAGI Long Term Care (LTC) Mixed Household Redetermination packet	
Non-MAGI Screening Packet	

**Table 2.5.2.2.B – Appropriate Mixed MAGI/Non-MAGI Medi-Cal RE Packets**

**D. Mixed MAGI/Non MAGI Medi-Cal (Non-MAGI Turning 65 Packet)**

- a. **CIV Only:** Update the Auto-set RE logic to run Medi-Cal with 'RE' EDBC Run Reason if all the following are true:
  - i. The Non-MAGI Turning 65 Packet submit month:
    - 1. Equals the Medi-Cal EDBC benefit month or
    - 2. Is prior to the Medi-Cal EDBC benefit month and the Medi-Cal EDBC benefit month is come-up month.
  - ii. The latest Non-MAGI Turning 65 Packet status is 'Reviewed- Ready to Run EDBC'.
  - iii. The latest Non-MAGI Turning 65 Packet submit month is on or after RE begin month.
  - iv. There does not exist any Medi-Cal RE Packet for the RE due month for the program.
    - If there exists any Medi-Cal RE Packet for the RE due month for the program, follow the auto-setting RE logic per recommendation 2.5.2.2.C

- b. **LRS/CalSAWS Only:** The current Auto-set RE logic in LRS/CalSAWS aligns with the recommendations above for C-IV with the exception of 2.5.2.2.D.a.i.2
  - i. Expand the Auto-set RE logic to also run Medi-Cal with 'RE' EDBC Run Reason if the Non-MAGI Turning 65 Packet submit month is prior to the Medi-Cal EDBC benefit month and the Med-Cal EDBC benefit month is come-up month.

**E. MAGI Medi-Cal only**

- a. The program selected is Medi-Cal
- b. All active members on the Medi-Cal program have a MAGI Medi-Cal aid code in the latest 'Accepted' and 'Saved' regular EDBC that's effective for the benefit month being processed.
- c. The EDBC Run Reason is not specified by the worker or batch
- d. The benefit month is equal to:
  - i. the month following the RE Due Date
  - or
  - ii. the come-up month
- e. If an appropriate MAGI RE packet exists (see Table 2.5.2.2.C) with submit month equal to the month of the RE Due Date for the Medi-Cal program, the latest status of the appropriate MAGI RE Packet is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'.
  - i. If more than one appropriate MAGI RE Packet exists for the same Medi-Cal program and same submit month, the latest status of at least one MAGI RE Packet is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'.
- f. The valid DER to be used by EDBC for this Medi-Cal program has 'RE' or 'RM' Run Reason and an accepted and saved regular EDBC was not run for this DER.
  - i. **CalSAWS only:** Because CalSAWS did not have functionality to send 'RM' Run Reason to CalHEERS until the release of this SCR, add an exception for CalSAWS to allow 'CO' Run Reason (in addition to 'RE' and 'RM') for four benefit months after the release of this SCR. After which, the exception to include 'CO' will expire and the EDBC Run Reason will only be auto-set for DERs with 'RE' or 'RM' Run Reason.
- g. The valid DER for the benefit month does not contain any Soft Pause individual
- h. Not an auto-test scenario.

C-IV	CalSAWS
MAGI RE Packet	MAGI MC Packet

**Table 2.5.2.2.C – Appropriate MAGI Medi-Cal RE Packets**

**Technical Note:** If EDBC is run or re-run for a month prior to the RE begin month, the RE period is not re-evaluated as per the current design and is not impacted by this SCR.

3. Update The Systems to auto-set the EDBC Run Reason to 'Soft Pause/Non-RE' during EDBC evaluation when the following conditions are met:
  - a. The program selected is Medi-Cal
  - b. The EDBC Run Reason is not specified by the worker or batch
  - c. The benefit month is equal to:
    - i. the month following the RE Due Date
    - or
    - ii. the come-up month
  - d. The valid DER to be used by EDBC for this Medi-Cal program has 'RE' or 'RM' Run Reason and an accepted and saved regular EDBC was not run for this DER.
    - i. **CalSAWS only:** Because CalSAWS did not have functionality to send 'RM' Run Reason to CalHEERS until the release of this SCR, add an exception for CalSAWS to allow 'CO' Run Reason (in addition to 'RE' and 'RM') for four benefit months after the release of this SCR. After which, the exception to include 'CO' will expire and the EDBC Run Reason will only be auto-set for DERs with 'RE' or 'RM' Run Reason.
  - e. The valid DER to be used by EDBC for this Medi-Cal program contains at least one Soft Pause individual

### 2.5.3 Programs Impacted

Medi-Cal

### 2.5.4 Performance Impacts

No change

## 2.6 eHIT

### 2.6.1 Overview

Update eHIT Disposition functionality for the new EDBC Run Reason 'Soft Pause/Non-RE'. CalSAWS only: Update eHIT logic to have 'RM' EDR Run Reason functionality.

### 2.6.2 Description of Change

1. Update eHIT Disposition logic to not send a Disposition to CalHEERS when a regular Medi-Cal EDBC is Accepted and Saved with 'Soft Pause/Non-RE' EDBC Run Reason.
2. **CalSAWS only:** Update eHIT logic to send 'Renewal – manual renewal' (RM) EDR Run Reason to CalHEERS beginning with the EDR Benefit Month two months prior to the RE Due Date and beyond.
3. **CalSAWS only:** Update eHIT Auto-Disposition logic to not send a Disposition to CalHEERS when the DER has 'RM' Run Reason and all individuals on the DER are MAGI Pending.

**Note:** The current eHIT Disposition logic will send a Disposition for every DER with the same benefit month as Medi-Cal EDBC when EDBC is run with 'RE' EDBC Run Reason. This functionality will not change.

### 2.6.3 Interface Partner

CalHEERS

## 2.7 Batch EDBC (CalSAWS only)

### 2.7.1 Overview

Add a Batch EDBC Skip Reason 'Soft Paused' that will skip a case from Batch EDBC processing when the valid DER has at least one individual with Eligibility Evaluation Reason of Soft Pause.

### 2.7.2 Description of Change

1. Add a new Batch EDBC Skip reason of "Soft Paused" to the 'Not Processed Reason Codes' category (CT\_707).
2. Update Batch EDBC Skip logic to skip a case with a new skip reason 'Soft Paused' when all the following are true:
  - a. The program is Medi-Cal.
  - b. The valid DER used by EDBC has at least one individual with Eligibility Evaluation Reason of Soft Pause.

### **2.7.3 Execution Frequency**

No change

### **2.7.4 Key Scheduling Dependencies**

No change

### **2.7.5 Counties Impacted**

CalSAWS counties

### **2.7.6 Failure Procedure/Operational Instructions**

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

## **2.8 Batch MAGI Renewal Sweep (CalSAWS only)**

### **2.8.1 Overview**

Update the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal manually (RM) from the online page.

### **2.8.2 Description of Change**

1. Update Batch MAGI Renewal Sweep (PB00CH203) to exclude cases from processing through Batch MAGI when it meets the following criteria:
  - a. There is a DER for this Medi-Cal program with 'RM' Run Reason for the same benefit month to be processed by Batch MAGI.

### **2.8.3 Execution Frequency**

No change

### **2.8.4 Key Scheduling Dependencies**

No change

### **2.8.5 Counties Impacted**

CalSAWS counties



## 2.8.6 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

## 2.9 Generate Non-MAGI Screening Packet

### 2.9.1 Overview

Create a new batch job for CalSAWS and update the existing batch job for C-IV to only generate the Non-MAGI Screening packet through batch for cases which are skipped during Batch EDBC with the reason of Soft Pause. CalSAWS only: Add a journal entry when the Non-MAGI Screening packet is generated through batch.

### 2.9.2 Description of Change

1. Create a new batch job for CalSAWS and update the existing batch job for C-IV (PB00R526) to send the Non-MAGI Screening Packet when the following conditions are true:
  - a. Case is skipped from Batch EDBC due to the reason of "Soft Pause" between the last success date and batch date.

**Technical Note:** Record exists in BATCH\_ELIG\_NOT\_PROC table with NOT\_PROC\_RSN\_CODE of SP.

- b. None of the following packets exist for the same effective month.

C-IV	CalSAWS
Non-MAGI Screening Packet	Non-MAGI Screening Packet
Mixed MC RE Packet	MC 604 IPS Packet
Non-MAGI Turning 65 Packet	Non-MAGI Turning 65 Packet

**Note for CIV:** The batch job currently checks if the Non-MAGI Screening Packet or Mixed MC RE Packet exist for the same effective month. With this SCR it is being updated to also check for Non-MAGI Turning 65 Packet

2. For each record returned in the driving query, insert a record into the batch transaction table to generate a Non-MAGI Screening Packet during forms processing.

Column	Value
Case ID	Case associated to the skipped EDBC record
Program ID	Medi-Cal program ID
Person ID	Primary Applicant of Active Medi-Cal program
Type Code	FR

Column	Value
Sub Type Code	NM
Eff Date	<p>First day of the month following the batch date</p> <p>Example: If the batch is run on 05/04/2019, the effective date will be 06/01/2019</p> <p><b>Note for C-IV:</b> The batch job currently populates the effective date as the first day of 2 months following the batch date. With this SCR, the effective date will be populated as first day of the month following the batch date.</p> <p>Example: If the batch is run on 05/04/2019, the current functionality populates the effective date as 07/01/2019. With this SCR, the effective date will populate as 06/01/2019.</p>
Created By	Batch
Updated By	Batch

3. **CalSAWS only:** Add the following custom Journal entry when the Non-MAGI Screening Packet is generated through Batch.

**Journal Category:** All

**Journal Type:** Document

**Short description:** Non-MAGI Screening Packet

**Long description:** The following forms were included for the {redeterDate} RE: Cover letter, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077A, APTC/CSR Brochure, and VRC. These items are due in 30 days.

### 2.9.3 Variable Population

Variable population through batch will be similar to the variable population when the packet is generated from Template Repository.

### 2.9.4 Execution Frequency

Daily

### 2.9.5 Key Scheduling Dependencies

Prior to forms processing

## 2.9.6 Counties Impacted

CalSAWS Counties

## 2.9.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

## 2.10 MAGI Emulator

### 2.10.1 Overview

Update the MAGI Emulator to return MAGI Determinations with Soft Pause and Soft Pause Lift. The MAGI Emulator is used for testing purposes only to emulate the results returned from CalHEERS on a MAGI Determination.

### 2.10.2 Description of Change

1. Add Soft Pause functionality to the MAGI Emulator with the following criteria:
  - If the life event code is blank and the second digit of the SSN is a '2', then return a MAGI Determination with Eligibility Evaluation Reason of 'Soft Pause' for that individual (in addition to current functionality that determines the individual eligibility and aid code by last digit of the SSN).
2. Add Soft Pause Lift functionality to the MAGI Emulator with the following criteria:
  - If the life event code is blank and the EDR has Soft Pause Lift indicated, then return a MAGI Determination with the individual MAGI Discontinue (no aid code) with Eligibility Evaluation Reason of 'Soft Pause Lift' (regardless of the last digit of their SSN).
  - If the life event code is "Had a Baby" and the EDR has Soft Pause Lift indicated, then return a MAGI Determination with the individual MAGI Eligible to aid code T2 with Eligibility Evaluation Reason of 'Soft Pause Lift' (regardless of the last digit of their SSN).

## 2.11 Automated Regression Test

### 2.11.1 Overview

New regression test scripts will be created to verify the Soft Pause validation message on the Run EDBC and negative Action Detail pages, and the RE and Soft Pause Run Reasons on these same pages.

## 2.11.2 Description of Change

### **EDBC Validation:**

Create new regression test scripts to verify that the appropriate new validation message displays in each of the following scenarios:

1. When attempting to run and accept regular EDBC with the 'RE' Run Reason for a benefit month in which the latest DER has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause.
2. When attempting to run and accept Negative Action EDBC with the 'RE' Run Reason for a benefit month in which the latest DER has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause.

### **Soft Pause:**

Create new regression test scripts to verify that EDBC can be run, and the RE Due Month not updated in each of the following scenarios:

1. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause, and regular EDBC is being run with the 'Soft Pause/Non-RE' run reason.
2. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause, and Negative Action EDBC is being run with the 'Soft Pause/Non-RE' run reason.

### **Soft Pause Lift at RE:**

Create new regression test scripts to verify that EDBC can be run, and the RE Due Month is updated in each of the following scenarios:

1. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of 'Soft Pause Lift', and regular EDBC is being run with the 'RE' run reason.
2. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause, and Negative Action EDBC is being run with the 'RE' run reason.

## 2.12 Regression Test Reports (CalSAWS Only)

### 2.12.1 Overview

The DHCS Renewals Master Request report provides counts on: Medi-Cal renewals, Medi-Cal renewals processing, and Medi-Cal continuance and discontinuance as a result of renewal processing. There are two versions of the report in the system. A form that is sent to the State directly and a version that is available to counties. The county version offers a detail sheet with person level information.

One field present on the report is the MAGI – Completed & Resulted in Continued Medi-Cal - Manual Ex-Parte which is defined as:

Manual Ex-Parte: Count those Renewals processed with worker intervention that did not require beneficiary provided information.

Current CalSAWS functionality is to send an EDR to CalHEERS with Renewal (RE) MAGI Run Reason during MAGI no-touch batch renewals. If the “RE” MAGI DER returns with a person MAGI Pending, Batch MAGI/EDBC skips the case and the worker must process the Medi-Cal Renewal manually. When the worker sends the next EDR, it is sent with the Continue (CO) MAGI Run Reason which means the corresponding DER has “CO” MAGI Run Reason.



The CalSAWS functionality will be updated to start sending Renewal - manual renewal (RM) MAGI Run Reason instead of “CO” MAGI Run Reason for MAGI manual renewals.


### 2.12.2 Description of Change

1. Regression test the DHCS Renewals Master Request Report to ensure that the report will collect information pertaining to the MAGI – Completed & Resulted in Continued Medi-Cal – Manual Ex-Parte when an EDR is sent using the following MAGI run reason code:

Code (395)	Short Description
RM	Renewal - manual renewal

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Medi-Cal	ACWDL 17-35 Implementation of the Soft Pause Removal through the Statewide Automated Welfare System	 ACWDL 17-35.pdf
2	Test	Current MAGI Emulator Behavior	 MAGI Emulator Behavior_08-01-2015

3	Client Correspondence	FDD for Non-MAGI Screening Packet	 FD_FRM_NonMAGI ScreeningPacket.doc
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## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.2.42	The LRS shall identify special Medi-Cal processing situations, including Sneede, Retro Medi-Cal, 1931 (b), QMB, SLMB, DDSD, Pickle, Medi-Cal bridging, and STP, and shall ensure that the necessary information is collected in order to determine eligibility for these programs.	LRS will now identify a MAGI Medi-Cal case in Soft Pause during renewal, generate a Non-MAGI Screening Packet to ensure necessary information is collected to determine eligibility.
2.8.1.7	The LRS shall determine when an individual is eligible for Medi-Cal coverage and shall ensure that all required information is collected, eligibility is determined, and share of cost is computed.	LRS will now prevent a worker from continuing MAGI Medi-Cal when an individual is in Soft Pause until all required information is collected, eligibility is determined, and share of cost is computed.

## 5 APPENDIX

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### 5.1 CalHEERS functionality for Soft Pause

Adverse actions for which CalHEERS will trigger Soft Pause include:

- Moving from MAGI Medi-Cal to Advanced Premium Tax Credits/Cost Sharing Reductions/Covered California Programs (APTC/CSR/CCP)
- Moving from non-premium MAGI Medi-Cal to premium MAGI Medi-Cal
- Moving from full scope MAGI Medi-Cal to limited or restricted scope MAGI Medi-Cal
- Moving from full scope MAGI Medi-Cal to pregnancy-related Medi-Cal
- Losing eligibility for MAGI Medi-Cal, including, but not limited to, turning 65 years old, becoming eligible for Medicare before age 65, or experiencing an increase in income that renders the individual ineligible due to being over program income limits

The Soft Pause groups are comprised of individuals who meet one or more of the following criteria:

- aged 65 or older
- attesting to blindness
- attesting to being disabled
- becoming eligible for Medicare
- a parent of a child under age 21
- a caretaker relative of a child under age 21
- a child under age 21
- a pregnant woman with income over 138 percent Federal Poverty Level up to the end of the 60-day post-partum period