Calsaws

California Statewide Automated Welfare System

# **Design Document**

## CA-221329

MAGI Person Detail page Cosmetic clean-up

	DOCUMENT APPROVAL HISTORY				
CalSAWS	Prepared By	Renee Gustafson			
	Reviewed By	[individual(s) from build and test teams that reviewed document]			

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/04/2020	.1	Original Draft	Renee Gustafson
12/07/2020	.2	Review draft with MC Committee for feedback	Renee Gustafson

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#### **1 OVERVIEW**

The MAGI Person Detail page displays the person details for an individual included in an Eligibility Determination Request (EDR) or Determination of Eligibility Response (DER) transaction in eHIT. The information communicated in an EDR and DER in eHIT has changed over time and the MAGI Person Detail page displays outdated information and some fields are duplicated on the page. This SCR cleans up and streamlines the MAGI Person Detail page for the current version of eHIT.

#### 1.1 Current Design

The MAGI Person Detail page **Name** section has an extra row of space after the row with 'Maiden Name:'.

The **CalHEERS Admin Information** section has extra rows of space after the row with 'Person Removed:'.

The **Individual Demographics** section displays 'Language:', 'Birth Country:' and 'US Date of Entry:' but none of these fields were ever used in eHIT. The 'Date of Death:' field is in the **Individual Demographics** section at the very bottom and is easy to miss.

		View Differences Ch
Name		
Last Name: Renee Test	First Name: Address Zip Ext	Middle Name:
Maiden Name:	Suffix:	Extra row of space
CalHEERS Admin Information		
CalHEERS Person Number:	Person Added:	Matching Bypass:
01	No	reasoning of passes
Person Removed:	Removal Date:	Removal Reason:
		Extra row of space
Individual Demographics		
Social Security Number: 654-78-9580	Reason for No SSN:	ATIN: ITIN:
Date of Birth:	CIN:	Gender: Lany net
08/08/1980	768403303	Female
Marital Status: Never Married	Was in Foster Care: No	Foster Care State:
Hispanic: No	Birth Losser	US Entry Date:
Tribe State:	Tribe Name:	
Received Indian Health Service	and the second se	Eligible:
Received Indian Health Servic No Race/Ethnic Origin	es: Indian Health Services No	Eligible:
Received Indian Health Service	es: Indian Health Services No	Eligible:
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Figure 1.1.1 – MAGI Person Detail page – Before with 'Name', 'CalHEERS Admin Information' and 'Individual Demographics' sections The **Address Information** section is missing the 'County' column in the list of addresses.

Preferred Method of Communication: Regular Mail	Preferred Written Language: English	Preferred Spoken Language: English		
- Address Information				
Physical Address same as Primary's: No	Mailing Address same as Primary's: No	Residing Outside Country/US:		
Туре	Address	Begin Date End Date		
Physical	123 W 1ST ST LOS ANGELES, CA 90012-4192	12/10/2020		
Mailing	123 W 1ST ST LOS ANGELES, CA 90012-4132	12/10/2020		
Temporary Out of the State:	No Permanent	Home Address: Missing		
No	No	"County"		

Figure 1.1.2 – MAGI Person Detail page – Before 'Address Information' section

erson 1		Relationship			Person 2	
Vo Data Found		Christians divided.			Sector States	
Income						
Stational Contraction of	al Amount: \$0.00	20000000	12011-14CAR			530.952
Source	Employer	Amount	Hire Date	Frequency	Begin Date End Date	- RDP Shared
Salary, Wages		\$100.00		Monthly	01/01/2020	-11
Deductions						
Type	Amount	Frequ	iency	Begin Date	- End Date	RDP Shared
No Data Found						69 
regnancy						
xpected Due Da	ste:	Number of L	Inborn Child	iren:	End Date:	
ACA Informati	on					
Primary Contac	ts Move	to Name'	Section		1.	A COLORADO
Yer			and the second second	meters.		Move to)
			Statement of the local division of the local			CalHERS
CALLEEDC DAME			They wanted and			
CalHEERS Pers	on Begin Date:		Person	Here and the		Admin
						Admin
CalHEERS Pers				rson End Dat		
Case Person Be	egin Date:		Case Pe			
	egin Date:	Testa	Case Pe			
Case Person Be	egin Date:		Case Pe		e	
Case Person Be Applying for He	egin Date:	Parin	Case Pe		e	
Case Person Be Applying for He	egin Date: eaith Coverage	Pertin	Case Pe		e	
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Case Person Be Applying for He No • Tax Filer Infe Primary Tax F	egin Date: Bolth Coverage ormation	Expected to this year: No	Case Pe Date	rson End Dat	e: End Date es Plan to I year: No Expect t NCP:	File Taxes this
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Case Person Be Applying for He No <b>* Tax Filer Infe</b> Primary Tax F No Expected Filin	egin Date: Bolth Coverage ormation	Expected to this year: No Claimed as No	Case Pe Date	rson End Dat	e: End Date es Plan to I year: No Expect t NCP: No NCP is n	File Taxes this to be Claimed by
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Case Person Be Applying for He No • Tax Filer Info Primary Tax F No Expected Filin Tax Filing Stal	egin Date: Balth Coverage formation Tiler: Ing Status:	Expected to this year: No Claimed as No	Case Pe Date a be Require a Dependen	rson End Dat d to File Taxe at:	e: End Date es Plan to I year; No Expect t NCP; No NCP is n Applicat No	File Taxes this to be Claimed by not on the tion:
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Case Person Be Applying for He No - Tax Filer Info Primary Tax F No Expected Filin Tax Filing Stal Caretaker: Non-Inco Blind or Disable No Intended To Re	egin Date: solth Coverage ormation iler: ig Status: tus Association: ed: ed: eturn Home:	Expected to this year: No Claimed as No Claimed as Temporary Other Indu	Case Pe Date be Require a Dependen Missing y Disability:	rson End Dat d to File Tax it: it by: Tax Depe No	e: End Date Es Plan to I year: No Expect t NCP: No NCP is n Applicat No endents' s	File Taxes this to be Claimed by tot on the tion:

Figure 1.1.3 – MAGI Person Detail page – Before 'ACA Information', 'Tax Filer Information' and 'Non-MAGI Referrals' sections

The **ACA Information** displays the 'Primary Contact:', 'CalHEERS Person Begin Date:', 'Case Person Begin Date:', 'Case Person End Date:' that are better suited for the **Name** and **CalHEERS Admin Information** sections.

The 'Person Date of Death:' is a duplicate of 'Date of Death:' in the **Individual Demographics** section.

The 'Applying for Health Coverage' is a duplicate of 'Applying for Health Coverage:' in **Additional Information** section.

The Tax Filer Information section is missing the 'Tax Dependents' sub section.

The Non-MAGI Referrals section displays fields that are duplicated in the Additional Information or Individual Demographics sections.

The page file is shared by both MAGI Person Detail and ICT External Person Detail pages.

#### 1.2 Requests

Update the MAGI Person Detail page as follows:

- 1. Remove duplicated fields on the page
- 2. Move some fields to other sections in the page to streamline the view
- 3. Add the Tax Dependents sub section.
- 4. Remove fields that are not valid for eHIT
- 5. Remove extra space after rows

Update the CalHEERS-related information on the ICT External Person Detail page

#### 1.3 Overview of Recommendations

1. The MAGI Person Detail page is now streamlined, and duplicate fields are removed.

#### 1.4 Assumptions

1. [Provide any assumptions that the recommendations are based on.]

#### **2 RECOMMENDATIONS**

#### 2.1 MAGI Person Detail

#### 2.1.1 Overview

The MAGI Person Detail page is now streamlined, and duplicate fields are removed.

#### 2.1.2 MAGI Person Detail Mockup

it Name: ress Zip Ext fix: rson Added: moval Date: se Person Begin Date:	Middle Name: Primary Contac Yes Matching Bypa Removal Reaso Case Person Er	ss: on:
ress Zip Ext fix: rson Added: moval Date:	Primary Contac Yes Matching Bypa Removal Reaso	ss: on:
rson Added: moval Date:	Yes Matching Bypa Removal Reaso	ss: on:
moval Date:	Removal Reaso	on:
moval Date:	Removal Reaso	on:
		1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.
se Person Begin Date:	Case Person Er	nd Date:
Reason for No SSN:	ATIN:	ITIN:
<b>CIN:</b> 768403303	Gender: Female	Date of Death:
Was in Foster Care: No	Foster Care State:	
Tribe Name:		
Indian Health Services E No	ligible:	
Chinese	Japanese	
Korean	Vietnames	e
Laotian	Hmong	
Mexican	Puerto Rica	an .
Mexican Guatemalan	Puerto Rica Other Hisp	
Guatemalan		
Guatemalan	Other Hisp	
Guatemalan	Other Hisp	
	Chinese Korean	Chinese Japanese Korean Vietnames

Figure 2.1.2.1 – MAGI Person Detail page – After with updates to 'Name', 'CalHEERS Admin Information' and 'Individual Demographics' sections

Туре	Address	County	Begin End Date Date
Physical	34 WRANGLER CT CHICO, CA 95928-7602	Butte	05/05/2015
Mailing	34 WRANGLER CT CHICO, CA 95928-7602	Butte	05/05/2015

Figure 2.1.2.2 – MAGI Person Detail page – After with update to 'Address Information' section

Person 1		Relationsh	ip		Person 2	
No Data Found						
• Income						
Projected Ann	ual Amount: \$0.00					
Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Share
Salary, Wages		\$100.00		Monthly	01/01/2020-	
- Deductions						
Туре	Amount	Free	quency	Begin Date	- End Date R	DP Shared
No Data Found						
Pregnancy Expected Due D	)ate:	Number of	/ Unborn Child	iren:	End Date:	
and a second to the		Number of	l Unborn Child	fren:	End Date:	
Expected Due D	ormation		to be Require			e Taxes th
Expected Due D • Tax Filer Infi Primary Tax F	ormation filer:	Expected this year: No	to be Require	ed to File Tax	es Plan to File year:	
Expected Due D  Tax Filer Inf  Primary Tax F  No  Expected Filir	ormation filer:	Expected this year: No Claimed a No	to be Require	ed to File Tax	es Plan to File year: No Expect to I NCP:	be Claimer
Expected Due D  Tax Filer Inf  Primary Tax F  No  Expected Filir	ormation filer: ng Status:	Expected this year: No Claimed a No	to be Require as a Depender	ed to File Tax	es Plan to File year: No Expect to I NCP: No NCP is not Application	be Claimer
Expected Due D Tax Filer Inf Primary Tax F No Expected Filir Tax Filing Sta	ormation Filer: ng Status: tus Association:	Expected this year: No Claimed a No	to be Require as a Depender	ed to File Tax	es Plan to File year: No Expect to I NCP: No NCP is not Application	be Claimed

Figure 2.1.2.3 – MAGI Person Detail page – After with 'ACA Information' and 'Non-MAGI Referrals' sections removed and 'Tax Dependents' sub section added

#### 2.1.3 Description of Changes

- 1. Name section
  - a. Move "Primary Contact:" from ACA Information section up to Name section. Position to the right of "Suffix:" and under "Middle Name:"
  - b. Remove extra line break after last row.
- 2. CalHEERS Admin Information section
  - a. Move "CalHEERS Person Begin Date:", "Case Person Begin Date:", and "Case Person End Date:" from ACA Information section up to CalHEERS Admin Information section. Position as last row.
  - b. Remove extra line break(s) after last row.
- 3. Individual Demographics section
  - a. Remove "Language:", "Birth Country:", and "US Date of Entry:" fields; none of these fields are used in eHIT.
  - b. Move "Date of Death:" from below **Race/Ethnic Origin** section up to the **Individual Demographics** section where "Language:" was positioned.
- 4. Address Information section
  - a. Add "County" column positioned between "Address" and "Begin Date". The "County" field will display the decode value for the address FIPS code for the record.
- 5. ACA Information section
  - a. Remove **ACA Information** section completely. This includes removing the following fields and subsections:
    - i. "Primary Contact:" moved to **Name** section with Recommendation 2.1.3.1.a.
    - ii. "CalHEERS Person Begin Date:", "Case Person Begin Date:", and "Case Person End Date:" - moved to **CalHEERS Admin Information** section with Recommendation 2.1.3.2.a.
    - iii. "Person Date of Death:" this field is duplicated. "Date of Death:" displays in **Individual Demographics** section.
    - iv. "Applying for Health Coverage:" this field is duplicated. "Applying for Health Coverage:" displays in **Additional** Information section.
      - 1. "Begin Date:" and "End Date:" these fields have no logic in eHIT and are always blank. If logic is added to the fields in a future SCR, the fields will be added to the page accordingly.
    - v. Non-MAGI Referrals subsection which includes the following duplicated fields:
      - "Blind or Disabled:" this field is duplicated. "Blind or Disabled:" displays in Additional Information section.
      - "Temporary Disability:"- this field is duplicated. "Temporary Disabled:" displays in Additional Information section.

- 3. "Long Term Care:" this field is duplicated. "Long Term Care:" displays in **Additional Information** section.
- 4. "Intended To Return Home:" this field is duplicated. "Intended To Return Home:" displays in **Additional Information** section.
- 5. "Other Indicator:" this field is duplicated. "Other:" displays in **Additional Information** section.
- 6. "Long Term Care Request:" this field is duplicated. "Long Term Care Request:" displays in Additional Information section.
- "Was in Foster Care:" this field is outdated. This is no longer sent in the Non-MAGI Referrals section and instead is sent as "Was in Foster Care:" in Individual Demographics section and is communicated in an EDR and DER.
- b. Promote **Tax Filer Information** subsection to be its own section (outside of what used to be **ACA Information** section).
  - Add Tax Dependents subsection under "Caretaker:" field. The Tax Dependents subsection lists the name(s) of the tax dependents of the tax filer. Each tax dependent is listed on a separate row. The name format is "<Last Name>, <First Name>"

#### 2.1.4 Page Location

#### <u>EDR</u>

In the context of a case

- Global: Eligibility
- Local: Customer Information
- Task: MAGI Eligibility → Request MAGI → MAGI Request Detail → Name hyperlink
- Global: Eligibility
- Local: Customer Information
- Task: MAGI Eligibility → Determination hyperlink → Request ID hyperlink → MAGI Request Detail →Name hyperlink
- Global: Eligibility
- Local: Case Summary
- Task: IAT Summary → Initiated Date hyperlink → Request ID hyperlink→ MAGI Request Detail →Name hyperlink

Not In the context of a case

- Global: Case Info
- Local: e-Tools
- Task: MAGI → MAGI Referral Search → Referral Date hyperlink → MAGI Referral Summary → Request ID hyperlink→ MAGI Request Detail →Name hyperlink

#### <u>DER</u>

In the context of a case

- Global: Eligibility
- Local: Case Summary
- Task: IAT Summary → Initiated Date hyperlink → MAGI Referral Detail
  →Name hyperlink

Not In the context of a case

- Global: Case Info
- Local: e-Tools
- Task: MAGI → MAGI Referral Search → Referral Date hyperlink → MAGI Referral Detail → Name hyperlink

#### 2.1.5 Security Updates

No changes

#### 2.1.6 Page Mapping

Update page mapping to reflect the updated fields and sections.

#### 2.1.7 Page Usage/Data Volume Impacts

No changes

#### 2.2 Automated Regression Test

#### 2.2.1 Overview

Review and update existing MAGI / Medi-Cal regression test scripts to remove references to the removed fields, and to correct the section identifiers for the moved fields.

#### 2.2.2 Description of Change

- 1. Remove script references to the following fields on the MAGI Person Detail page:
  - a. Language
  - b. Birth Country
  - c. US Entry Date
  - d. Person Begin Date
  - e. Applying for Health Coverage table
  - f. ACA Information section contents
  - g. Was in Foster Care (duplicate)
- 2. Update the section identifiers for the following fields:
  - a. Primary Contact
  - b. CalHEERS Person Begin Date
  - c. Case Person Begin Date
  - d. Case Person End Date
  - e. Tax Filer Information section contents

### **3 REQUIREMENTS**

## 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met