

# CalSAWS

California Statewide Automated Welfare System

## Design Document

CA-221329

MAGI Person Detail page Cosmetic clean-up

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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	Reviewed By	[individual(s) from build and test teams that reviewed document]

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## 1 OVERVIEW

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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 The information communicated in an EDR and DER in eHIT has changed over time and the MAGI Person Detail page displays outdated information and some fields are duplicated on the page.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.

## MAGI Person Detail

View Differences Close

### 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: 01	Person Added: No	Matching Bypass:
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: 08/08/1980	CIN: 768403303	Gender: Female	Language:
Marital Status: Never Married	Was in Foster Care: No	Foster Care State:	
Hispanic: No	Birth Country:	US Entry Date:	
Tribe State:	Tribe Name:		
Received Indian Health Services: No	Indian Health Services Eligible: No		

### Race/Ethnic Origin

American Indian or Alaskan Native

Black or African American

Asian

Filipino	Chinese	Japanese
Cambodian	Korean	Vietnamese
Asian Indian	Laotian	Hmong

Hispanic (Latino or Spanish origin)

Cuban	Mexican	Puerto Rican
Salvadoran	Guatemalan	Other Hispanic

✓ Native Hawaiian or Other Pacific Islander

Native Hawaiian	✓ Guamanian	Samoan
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Other

White

Unknown

### Optional Gender Identity and Sexual Orientation Information

Date of Death:

### Citizenship Documents

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.

The screenshot displays the 'Address Information' section of the MAGI Person Detail page. It includes a table with columns for 'Type', 'Address', 'Begin Date', and 'End Date'. A red box highlights the missing 'County' column. A red arrow points to a 'Missing County' error message.

Type	Address	Begin Date	End Date
Physical	123 W 1ST ST LOS ANGELES, CA 90012-4112	12/10/2020	
Mailing	123 W 1ST ST LOS ANGELES, CA 90012-4112	12/10/2020	

Missing "County"

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

**Relationships**

Person 1	Relationship	Person 2
No Data Found		

**Income**

Projected Annual Amount: \$0.00

Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
Salary, Wages		\$100.00		Monthly	01/01/2020-	

**Deductions**

Type	Amount	Frequency	Begin Date - End Date	RDP Shared
No Data Found				

**Pregnancy**

Expected Due Date:                      Number of Unborn Children:                      End Date:

**ACA Information**

Primary Contact:  Yes  No Move to 'Name' Section

CalHEERS Person Begin Date:  ~~Person End Date:~~ Move to CalHERS Admin Information

Case Person Begin Date:  Case Person End Date:

**Applying for Health Coverage**

Applying for Health Coverage	Begin Date	End Date
No		

**Tax Filer Information**

Primary Tax Filer:	Expected to be Required to File Taxes this year:	Plan to File Taxes this year:
No	No	No
Expected Filing Status:	Claimed as a Dependent:	Expect to be Claimed by NCP:
No	No	No
Tax Filing Status Association:	Claimed as a Dependent by:	NCP is not on the Application:
		No
Caretaker:	<span style="border: 1px solid red; padding: 2px;">Missing 'Tax Dependents' section</span>	

**Non-MAGI Referrals**

Blind or Disabled:	Temporary Disability:	Long Term Care:
No		No
Intended To Return Home:	Other Indicators:	Long Term Care Request:
No	No	No
Was in Foster Care:		
No		

**Other Health Care**

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

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### 2.1 MAGI Person Detail

#### 2.1.1 Overview

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

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## 2.1.2 MAGI Person Detail Mockup

### MAGI Person Detail

View Differences
Close

Name		
<b>Last Name:</b> Renee Test	<b>First Name:</b> Address Zip Ext	<b>Middle Name:</b>
<b>Maiden Name:</b>	<b>Suffix:</b>	<b>Primary Contact:</b> Yes

▶ CalHEERS Admin Information

<b>CalHEERS Person Number:</b> 01	<b>Person Added:</b> No	<b>Matching Bypass:</b>
<b>Person Removed:</b>	<b>Removal Date:</b>	<b>Removal Reason:</b>
<b>CalHEERS Person Begin Date:</b>	<b>Case Person Begin Date:</b>	<b>Case Person End Date:</b>

Individual Demographics

<b>Social Security Number:</b> 654-78-9580	<b>Reason for No SSN:</b>	<b>ATIN:</b>	<b>ITIN:</b>
<b>Date of Birth:</b> 08/08/1980	<b>CIN:</b> 768403303	<b>Gender:</b> Female	<b>Date of Death:</b>
<b>Marital Status:</b> Never Married	<b>Was in Foster Care:</b> No	<b>Foster Care State:</b>	
<b>Hispanic:</b> No			
<b>Tribe State:</b>		<b>Tribe Name:</b>	
<b>Received Indian Health Services:</b> No		<b>Indian Health Services Eligible:</b> No	

Race/Ethnic Origin

American Indian or Alaskan Native

Black or African American

Asian

Filipino	Chinese	Japanese
Cambodian	Korean	Vietnamese
Asian Indian	Laotian	Hmong

Hispanic (Latino or Spanish origin)

Cuban	Mexican	Puerto Rican
Salvadoran	Guatemalan	Other Hispanic

✓ Native Hawaiian or Other Pacific Islander

Native Hawaiian	✓ Guamanian	Samoan
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Other

White

Unknown

▶ Optional Gender Identity and Sexual Orientation Information

Citizenship Documents

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

Type	Address	County	Begin Date	End 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

**Relationships**

Person 1	Relationship	Person 2
No Data Found		

**Income**

Projected Annual Amount: \$0.00

Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
Salary, Wages		\$100.00		Monthly	01/01/2020-	

**Deductions**

Type	Amount	Frequency	Begin Date - End Date	RDP Shared
No Data Found				

**Pregnancy**

Expected Due Date:	Number of Unborn Children:	End Date:

**Tax Filer Information**

<b>Primary Tax Filer:</b> No	<b>Expected to be Required to File Taxes this year:</b> No	<b>Plan to File Taxes this year:</b> No
<b>Expected Filing Status:</b>	<b>Claimed as a Dependent:</b> No	<b>Expect to be Claimed by NCP:</b> No
<b>Tax Filing Status Association:</b>	<b>Claimed as a Dependent by:</b>	<b>NCP is not on the Application:</b> No

Caretaker:

**Tax Dependents**

Test, Child

**Other Health Care**

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:
      1. "Blind or Disabled:" - this field is duplicated. "Blind or Disabled:" displays in **Additional Information** section.
      2. "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.
  7. "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).
    - i. 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

### EDR

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

### DER

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

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#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

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