



Design Document

CA-202724 and CIV-100708

Medi-Cal Annual Renewal NOA



DOCUMENT APPROVAL HISTORY

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1 OVERVIEW

This enhancement is to implement the new NOA text in ACWDL 19-03.

1.1 Current Design

Medi-Cal NOAs are sent when there is a change in eligibility with a noticing requirement. There is not a NOA specifically for a no change renewal.

1.2 Requests

Add the new Medi-Cal Annual Renewal reason to the non-MAGI, MAGI and mixed non-MAGI/MAGI NOAs. This new reason will generate for an individual when there is no change in the eligibility status or level of benefits and it is a Medi-Cal Renewal and/or change in circumstance that results in the resetting of the annual renewal date.

1.3 Overview of Recommendations

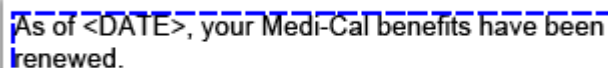
A new reason for non-MAGI, MAGI, and mixed non-MAGI/MAGI NOAs will be created for Medi-Cal Renewals and change in circumstances redetermination that results in the resetting of the annual renewal date. The new reasons will require logic updates to existing NOA fragments and new NOA fragments to meet the requirements in ACWDL 19-03.

Note: See Supporting Documents #1 and #2 for Example NOAs for both C-IV and LRS.

1.3.1 Add new Action Statement for Medi-Cal Annual Renewals

This enhancement will add an Action fragment for non-MAGI, MAGI, and mixed non-MAGI/MAGI NOAs for No Change Annual Renewals. This will generate with the new Medi-Cal Annual Renewal Reason (see Section 1.3.3 for new Reason).

Action Statement example:



As of <DATE>, your Medi-Cal benefits have been renewed.

Note: The MAGI Header statement will still generate as the first fragment on the MAGI NOAs. See Supporting Documents #1 for Example MAGI NOAs for both C-IV and LRS.

Existing MAGI Header Statement:

We have reviewed your eligibility for health coverage.
We used the information you gave us and state and federal data to make this decision.

1.3.2 Add Individual Actions for Medi-Cal Annual Renewal Reason

ACWDL 19-03 states that the new reasons are to be “*at the individual level*”. This requires that there is a description prior to the new reason of whom the reason is being provided for. This Individual Action will generate prior to each instance of the new Medi-Cal Annual Renewal Reason (see Section 1.3.3 for new Reason).

Individual Action example:

The following message explains eligibility for
<PERS_NAME>.

Note: This new Individual Action follows the structure being created with SCR **CA-204496** which will add logic to combine non-MAGI and MAGI text onto the same pages for mixed non-MAGI/MAGI NOAs in LRS.

1.3.3 Add new Reason for Medi-Cal Annual Renewals

ACWDL 19-03 provided Medi-Cal Annual Renewal Reason text for non-MAGI, MAGI, and mixed non-MAGI/MAGI NOAs. A new Medi-Cal Annual Renewal Reason Fragment will be added with dynamic section generation to provide the appropriate information based on the case information. This new Reason fragment will generate for an individual on non-MAGI, MAGI, and mixed non-MAGI/MAGI NOAs when there is no change in the eligibility status or level of benefits and it is a Medi-Cal Renewal and/or change in circumstance that results in the resetting of the annual renewal date. This fragment will generate per person. This new Reason will obsolete the existing MAGI No Change Renewal fragment.

Obsoleted Existing MAGI No Change Renewal Fragment Text:

We must check if you still qualify for Medi-Cal once a year. We checked your case and you still qualify for Medi-Cal because your household income is below the Medi-Cal limit for your family size. Your Medi-Cal coverage will continue unless you are found no longer eligible. This could happen at the time your eligibility is renewed or when your circumstances change.

We counted your household size and your household income to make our decision. If the information we list for your household size or income is not correct, please contact us to report your updated information.

The new Reason fragment sections will generate in the order listed in the following table:

#	Section	Text	Generation Conditions
1	Static Section	<p>Your Medi-Cal is renewed for the next year. We checked to see if you can still get Medi-Cal. We must check once a year. We also check when there is a change in your circumstances. To decide, we used information you gave us or that is available to us. Based on this information, you will have Medi-Cal for the next year. We will check again in one year to see if you can keep getting Medi-Cal. We will check sooner if you have a change in circumstances.</p> <p>We used the information below to make our decision. If anything below is wrong, please contact us to tell us the right information. To learn how to report updated information to your county office, read the section called "Do you have any changes?" below.</p> <p>Household Size: <HH_SIZE> Monthly Countable Household Income: <HH_INC></p>	N/A
2	Tax Filing Section	Tax Filing Status: <TAX_FILE>	This section will generate when the fragment generated for MAGI.
3	Static Section	Marital Status: <MARRIED>	N/A
4	Property Section	Countable Property: <PROP>	This section will generate when the fragment generated for non-MAGI.

5	Blind Disabled Section	Blind or Disabled: Yes	This section will generate when the fragment generated for non-MAGI and the person is blind or disabled.
6	Pregnant Section	Pregnant: Yes	This section will generate when the person is pregnant.
7	Child Section	Have a Child You Are Responsible For<CHILD>	This section will generate if the person is responsible for a child. Note: The Variable <CHILD> will generate with “: Yes” when the fragment generated for non-MAGI. Otherwise the Variable will be null (not visible) as the following MAGI Child Section will contain the value for this field.
8	MAGI Child Section	(Under 18, or 18 and Full-Time Student): Yes	This section will generate if the person is responsible for a child and the fragment generated for MAGI.
9	Static Section	Citizenship/Immigration Status: <CITIZEN>	N/A
10	Unverified Citizen Section	Your Citizenship/Immigration Status is not verified. If you have proof of your citizenship or immigration status that you can give us now, or you want to let us know you are having problems getting your document, please call your county worker at the number listed on this notice. Without proof, you may not be able to get the full range of benefits available to you.	This section will generate if the person has an unverified Citizenship status and is receiving restricted scope benefits.
11	MAGI Section	We counted your household size and income to make our decision. For Medi-Cal: <ul style="list-style-type: none"> Your household size is <MAGI_SIZE>. Your monthly household income is <MAGI_INCOME>. <p>The monthly Medi-Cal income limit for your household size is <MAGI_INCOME_LIMIT>. Your income is below this limit, so you qualify for Medi-Cal.</p>	This section will generate if the fragment generated for MAGI.

12	Non-MAGI Section	<p>Your share of cost will stay the same. As a reminder, this is how we determined your share of cost:</p> <p>Monthly gross income <GROSS_INC> Monthly net nonexempt income <NET_INC> Maintenance need <M_NEED> Excess income/share-of-cost <SOC_AMT></p>	<p>This section will generate if the fragment generated for non-MAGI with a Share of Cost.</p> <p>Note: The Reason fragment will only generate if there is no change in Share of Cost so no check is required at the Section level.</p>
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1.3.4 Add new Regulations for New Medi-Cal Annual Renewal Reason

ACWDL 19-03 provided new regulations that are to be provided with the new Medi-Cal Annual Renewal Reason for both non-MAGI, MAGI, and mixed non-MAGI/MAGI NOAs. This requires the MAGI Regulation Message be generated on the NOA to provide a place for these new regulations to generate for MAGI. This Message with the new regulations will generate after each instance of the new Medi-Cal Annual Renewal Reason for MAGI. Non-MAGI will generate the new regulations in the regulations section of the first page of the NOA. This will use the existing regulation generation logic and text within LRS and C-IV.

Existing MAGI Regulations Example (C-IV):

W&I Code Section 14005.37; Title 42, CFR Section 435.916 is the regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.

1.3.5 Create New NOA Footer Message Fragment

ACWDL 19-02 provided a new NOA footer message for non-MAGI, MAGI, and mixed non-MAGI/MAGI NOAs. ACWDL 19-03 requests that this new footer is used with the new Medi-Cal Annual Renewal Reason. This footer fragment will generate when there is at least one instance of the new Medi-Cal Annual Renewal Reason generated on the NOA or if the non-MAGI, MAGI, or mixed non-MAGI/MAGI NOA is an approval and or change. The existing MAGI footer will be suppressed when this new footer generates for MAGI NOAs. The existing C-IV non-MAGI Report Income within 10 Days fragment will be replaced with this new Footer to prevent repetitive verbiage on the NOA.

Obsoleted C-IV Report Income within 10 Days Fragment:

You must report within ten days any significant changes that could affect your eligibility, such as changes in your income, property, medical condition, or household situation.

Medi-Cal Annual Renewal Footer Example (Note, the example below is for non-MAGI, the bullet "Your property changes" will not generate for MAGI):

Do you have any changes?

Over the next year, you must report any life changes that affect your eligibility for Medi-Cal. You must report within **10 days** after the change happened. For example, you must contact us if:

- Your income changes.
- Your household changes, such as you marry, divorce, become pregnant, or have or adopt a child; a person moves into or out of your home; or you change who will be on your tax return.
- You qualify for other health insurance.
- You move. If you move to a new county, you can report your change to your old or new county.
- Your property changes.

You may report changes to your local county office in person or by mail, fax, phone, or electronically. The contact information is on the first page of this notice.

1.3.6 Add NOA Title and Footer Reference for new Reason

Add logic to update the NOA title to "MEDI-CAL APPROVAL" for the new Annual Renewal Reason NOA. When the Annual Renewal Reason is generating on its own NOA and not being merged onto a Change NOA the title of the NOA will generate as an Approval.

C-IV: The NOA title will only generate for non-MAGI NOAs in C-IV as the MAGI NOA currently do not have title generation. C-IV Medi-Cal NOAs (non-MAGI, MAGI, mixed non-MAGI/MAGI) also do not have logic to populate a Form number at the bottom of the NOA. This enhancement will not add new title or footer functionality.

LRS: To identify this new NOA, a new footer reference will be created. The title will be "MC NO CHANGE RE".

NOA Title Example:

**NOTICE OF ACTION
MEDI-CAL APPROVAL**

NOA Footer Example:

MC NO CHANGE RE

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1.4 Assumptions

- 1) The new Medi-Cal Footer fragment added in this SCR replaces the existing MAGI Footer when generated as per ACWDL 19-02.
- 2) The new regulations will generate for MAGI in the existing MAGI regulation text in the body of the NOA ~~instead of the Non-MAGI Regulations Section on the first page of the NOA.~~ The systems will use existing MAGI Regulation message functionality.
- 3) **C-IV:** No new NOA logic will be added regarding the functionality around the NOA Title or Footer with this effort. The functionality will be used if already existing in the system. CalACES/LRS functionality around NOA Titles and Footers will be inherited at migration.
- 4) **LRS:** Currently Medi-Cal NOA fragments do not generate on the same notice together when generated for different Action types and/or when the fragment reasons are associated to different header and footer fragments. This will not be updated with this enhancement. SCR CA-204497 will update the mixed non-MAGI/MAGI NOAs to allow for merging of differing action NOAs.
- 5) This effort will not update existing or add new Medi-Cal NOA templates. The systems will generate the NOA in the existing format used for Medi-Cal NOAs (C-IV: Letter Format, LRS: Columned Format).
- 6) This new NOA will generate for regular Medi-Cal (MAGI and non-MAGI). This NOA will not generate for MSP ~~or LTC~~.
- 7) This effort will include LTC NOAs.

2 RECOMMENDATIONS

This enhancement will add the new Medi-Cal Annual Renewal text from ACWDL 19-03 to both C-IV and LRS. This will require new Action and Individual Action fragments to describe the program and person actions on the case. This will require a new reason fragment to add the new non-MAGI and MAGI reason text to the NOAs. This new reason will have dynamic sections that generate based on the case information. This will require updates to the MAGI regulation fragment and updates to the existing MAGI footer fragments to accommodate the new regulations and new footer information. This will require the new Footer fragment from ACWDL 19-02.

2.1 Add new Action Statement for Medi-Cal Annual Renewals

2.1.1 Overview

A new Action Fragment will be created to describe the program-level action on the case. This will generate when there is an instance of the new Medi-Cal Annual Renewal Reason (See Recommendation 2.3 for new reason fragment).

C-IV: This new Action Fragment will generate and produce a NOA when a Change NOA is not generating for the EDBC. If a Change NOA is generating the new Medi-Cal Annual Renewal Reason will generate on the Change NOA.

LRS: The system does not currently have functionality to support merging NOAs. This new Action statement and NOA for Annual Renewals will generate separately from other NOAs with this enhancement. There are future SCRs (CA-204496 and CA-204497) that will add the ability to merge the Annual Renewal Reason with existing mixed non-MAGI/MAGI NOAs.

Note: See Supporting Documents #4 for FDD.

2.1.2 Create a new Medi-Cal Action Fragment

Create a new Action Fragment for Medi-Cal Annual Renewal NOAs.

This fragment will be added in:

C-IV:

English and threshold languages – Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

LRS:

English and threshold languages that currently have Medi-Cal NOA templates for generation - Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese.

Description	Text	Formatting*
Main Fragment	As of <DATE>, your Medi-Cal benefits have been renewed.	Arial size 10 font

*English only, Spanish and threshold will generate based on project standards for that language.

Note: The existing MAGI Header (LRS: H_STATIC, C-IV: MSG_MAGI_HEADER_MESSAGE) will continue to generate as the first fragment on the MAGI NOAs. The above new Action Fragment will follow the existing MAGI Header fragment for MAGI NOAs (including on mixed non-MAGI/MAGI NOAs). The Action Fragment will be the first fragment for non-MAGI only NOAs.

2.1.3 Add generation for new Action Fragment

C-IV:

1. Create a new rule to generate a No Change Renewal NOA with this new Action Fragment when a Medi-Cal Change NOA was not generated and all the following are true for at least one person on the Medi-Cal program:
 - A Medi-Cal Change NOA is not already generating for the newly saved EDBC.
 - The EDBC was run with RE run reason. Note: This includes both online worker run and Batch run RE run reason EDBCs.
 - There is a prior EDBC for the month and in that EDBC the person was receiving the same share of cost amount as in the newly saved EDBC.
Or
There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same share of cost amount as in the newly saved EDBC.
 - There is a prior EDBC for the month and in that EDBC the person was receiving the same scope of benefits (full, limited, restricted) as in the newly saved EDBC.
Or
There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same

scope of benefits (full, limited, restricted) as in the newly saved EDBC.

2. If the No Change Renewal NOA is not generated from # 1, then if a Medi-Cal Change NOA has generated add the new Action Fragment to this NOA when all the following are true for at least one person on the Medi-Cal program:
 - The EDBC was run with RE run reason via worker run EDBC.
 - There is a prior EDBC for the month and in that EDBC the person was receiving the same share of cost amount as in the newly saved EDBC.
 - Or
 - There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same share of cost amount as in the newly saved EDBC.
 - There is a prior EDBC for the month and in that EDBC the person was receiving the same scope of benefits (full, limited, restricted) as in the newly saved EDBC.
 - Or
 - There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same scope of benefits (full, limited, restricted) as in the newly saved EDBC.

LRS:

Add NOA fragment logic to generate this new Action fragment if there exists at least one instance of the new Medi-Cal Annual Renewal Reason (see Recommendation 2.3 for the new reason fragment). This fragment will generate only once prior to the individual action, reason, and message fragments.

2.1.4 Add Variable Population logic for new Action Fragment

Add variable population for the new Action Fragment.

Variable	Population	Formatting*
<DATE>	The first day of the EDBC Benefit Month. For example: "2/1/2019".	Arial size 10 font

*English only, Spanish and threshold will generate based on that languages standards.

2.2 Add/Update Individual Action Fragments for non-MAGI and MAGI

2.2.1 Overview

A new Individual Action Fragment will be created to describe the person-level action on the case. This will generate for when there is an instance of the new Medi-Cal Annual Renewal Reason (See Recommendation 2.3 for new reason fragment).

Note: See Supporting Documents #5 for FDD.

2.2.2 Create a new Medi-Cal Individual Action Fragment

Create a new Individual Action Fragment for Medi-Cal Annual Renewal NOAs.

This fragment will be added in:

C-IV:

English and threshold languages – Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

LRS:

English and threshold languages that currently have Medi-Cal NOA templates for generation - Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese.

Description	Text	Formatting*
Main Fragment	The following message explains eligibility for <PERS_NAME>.	Arial size 10 font

*English only, Spanish and threshold will generate based on that languages standards.

2.2.3 Add Medi-Cal Fragment Generation for new Individual Action

Set this fragment as the header fragment in the database (NOA_SNIPPET_CONFIG table) for the new Medi-Cal Annual Renewal Reason fragment (see Recommendation 2.3). This fragment will generate prior to each instance of the new Medi-Cal Annual Renewal Reason (see Recommendation 2.3 for the new reason fragment).

2.2.4 Add Variable Population logic for new Individual Action

Add the following Variable population for the new Individual Action Fragment:

Variable	Population	Formatting*
<PERS_NAME>	The Name of the Person the fragment generated for. For example, "John Doe".	Bold Arial size 10 font

*English only, Spanish and threshold will generate based on that languages standards.

2.3 Create new Medi-Cal NOA Reason Fragment for Annual Renewals

2.3.1 Overview

A new Reason Fragment will be created for no change Annual Renewals or redeterminations causing a change in the Annual Renewal due date. This new fragment will have dynamic sections that generate based on the case. This new Reason Fragment will obsolete the existing MAGI No Change Renewal Reason.

Note: See Supporting Documents #6 for FDD.

2.3.2 Create a new Medi-Cal Annual RE Reason Fragment

Create a new Reason Fragment for Medi-Cal Annual Renewal NOAs. This fragment will have dynamic sections that have their own generation conditions.

This fragment will be added in:

C-IV:

English and threshold languages – Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

LRS:

English and threshold languages that currently have Medi-Cal NOA templates for generation - Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese.

Medi-Cal Annual Renewal Reason Sections:

Description	Text	Formatting*
Main Fragment	<p>Your Medi-Cal is renewed for the next year.</p> <p>We checked to see if you can still get Medi-Cal. We must check once a year. We also check when there is a change in your circumstances. To decide, we used information you gave us or that is available to us. Based on this information, you will have Medi-Cal for the next year. We will check again in one year to see if you can keep getting Medi-Cal. We will check sooner if you have a change in circumstances.</p> <p>We used the information below to make our decision. If anything below is wrong, please contact us to tell us the right information. To learn how to report updated information to your county office, read the section called “Do you have any changes?” below.</p> <p>Household Size: <HH_SIZE> Monthly Countable Household Income: <HH_INC> {TAX_SECTION} Marital Status: <MARRIED> {PROP_SECTION} {DISABLED_SECTION} {PREG_SECTION} {CHILD_SECTION} {CHILD_SECTION2} Citizenship/Immigration Status: <CITIZEN></p> <p>{UNVERIF_SECTION} {MAGI_SECTION} {NON_MAGI_SECTION}</p>	<p>The first sentence will generate in Bold Arial size 10 font.</p> <p>The rest of the fragment text will generate in Arial size 10 font.</p>
Dynamic Section {TAX_SECTION}	Tax Filing Status: <TAX_FILE>	Arial size 10 font
Dynamic Section {PROP_SECTION}	Countable Property: <PROP>	Arial size 10 font
Dynamic Section {DISABLED_SECTION}	Blind or Disabled: Yes	Arial size 10 font
Dynamic Section {PREG_SECTION}	Pregnant: Yes	Arial size 10 font

Dynamic Section {CHILD_SECTION}	Have a Child You Are Responsible For: <CHILD>	Arial size 10 font
Dynamic Section {CHILD_SECTION2}	(Under 18, or 18 and Full-Time Student): Yes	Arial size 10 font
Dynamic Section {UNVERIF_SECTION}	Your Citizenship/Immigration Status is not verified. If you have proof of your citizenship or immigration status that you can give us now, or you want to let us know you are having problems getting your document, please call your county worker at the number listed on this notice. Without proof, you may not be able to get the full range of benefits available to you.	Arial size 10 font
Dynamic Section {MAGI_SECTION}	We counted your household size and income to make our decision. For Medi-Cal: <ul style="list-style-type: none"> • Your household size is <MAGI_SIZE>. • Your monthly household income is <MAGI_INCOME>. <p>The monthly Medi-Cal income limit for your household size is <MAGI_INCOME_LIMIT>. Your income is below this limit, so you qualify for Medi-Cal.</p>	Arial size 10 font
Dynamic Section {NON_MAGI_SECTION}	Your share of cost will stay the same. As a reminder, this is how we determined your share of cost: <p style="text-align: center;"> Monthly gross income <GROSS_INC> Monthly net nonexempt income <NET_INC> Maintenance need <M_NEED> Excess income/share-of-cost <SOC_AMT> </p>	Arial size 10 font

*English only, Spanish and threshold will generate based on that language standards.

Note: LRS will have an additional Dynamic Section that will contain the existing Regulation Variable. See Supporting Documents #6 for FDD.

2.3.3 Update Medi-Cal Fragment Generation logic for new Reason

C-IV:

1. Create a new rule to generate this new Reason Fragment for a person when all the following are true:
 - A Medi-Cal Change or No Change Renewal NOA (See Recommendation 2.1) is generating.

- A Medi-Cal Individual Change Action does not exist for this person.
- The EDBC was run with the RE run reason. Note: This includes Batch EDBC run with the RE run reason.
- There is a prior EDBC for the month and in that EDBC the person was receiving the same share of cost amount as in the newly saved EDBC.
Or
There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same share of cost amount as in the newly saved EDBC.
- There is a prior EDBC for the month and in that EDBC the person was receiving the same scope of benefits (full, limited, restricted) as in the newly saved EDBC.
Or
There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same scope of benefits (full, limited, restricted) as in the newly saved EDBC.

LRS:

1. Create a new rule to generate a NOA with this new Reason Fragment per person when all the following are true:
 - The EDBC was run with automated RE run reason.
 - The person is not receiving another NOA for the same month via the same EDBC.
 - There is a prior EDBC for the month and in that EDBC the person was receiving the same share of cost amount as in the newly run EDBC.
Or
There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same share of cost amount as in the newly saved EDBC.
 - There is a prior EDBC for the month and in that EDBC the person was receiving the same scope of benefits (full, limited, restricted) as in the newly run EDBC.
Or
There is not a prior EDBC for the month and there is an EDBC for the prior month and in that EDBC the person was receiving the same scope of benefits (full, limited, restricted) as in the newly run EDBC.

2. Add this new reason to the reason fragments in the database (NOA_SNIPPET_CONFIG table).

2.3.4 Add Dynamic Section Generation Logic

Create the following generation logic for the Sections within the new reason fragment:

Section	Generation Conditions
{TAX_SECTION}	Generates when the person is receiving MAGI benefits in the newly run EDBC.
{PROP_SECTION}	Generates when the person is receiving Non-MAGI benefits in the newly run EDBC.
{DISABLED_SECTION}	Generates for Non-MAGI and if the person is blind or disabled for Medi-Cal. <i>(use existing person.isDisabled() and person.isBlind() logic)</i>
{PREG_SECTION}	Generates if there exists a pregnancy record for the person. <i>(use database value PREG.PER_MOTHER_ID and check that the EDBC begin date is between the Pregnancy Date Reported and Termination Date)</i>
{CHILD_SECTION}	MAGI: The person has a M3 or M4 aid code in the newly run EDBC. Non-MAGI: The person has Parental Control of a child on the Relationship page and the child is under 21.
{CHILD_SECTION2}	CHILD_SECTION has generated, and the person is receiving MAGI benefits in the newly run EDBC.
{UNVERIF_SECTION}	Generates when the citizenship record is unverified or if the Birth Country record is unverified depending which was used for the CITIZEN variable population. <i>(use database value VERIF.CITZ_ID)</i>
{MAGI_SECTION}	Generates for when the person is receiving MAGI benefits in the newly run EDBC.
{NON_MAGI_SECTION}	Generates when the person is receiving Non-MAGI benefits and the person has a share of cost in the newly run EDBC.

	(BUDGET.SHARE_OF_COST_AMT is not null)
--	--

2.3.5 Add Variable Population logic for new Reason Fragment

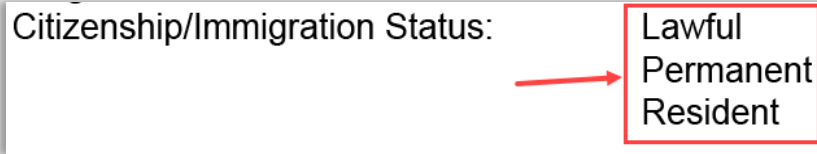
Add variable population for the new Reason Fragment.

Variable	Population	Formatting*
<HH_SIZE>	<p>The household size used by EDBC/CalHEERS.</p> <ul style="list-style-type: none"> For MAGI use database value CH_ELIG_DETL.MAGI_SIZE For Non-MAGI use database value MC_BUDGET.HH_SIZE_QTY 	<p>Arial Size 10 font, in a numerical format.</p> <p>For example, "3"</p>
<HH_INC>	<p>The countable household income.</p> <ul style="list-style-type: none"> For MAGI use database value CH_ELIG_DETL.MAGI_INC_AMT For Non-MAGI use database value MC_BUDGET.TOTAL_NET_INC_AMT 	<p>Arial Size 10 font, in a currency format.</p> <p>For example, "\$1,000.00"</p>
<TAX_FILE>	<p>The expected filing status for the person.</p> <p>Use database value</p> <ul style="list-style-type: none"> If there is a Tax Filing Status use Tax_HH.EXPECT_FILE_STAT_CODE and CT306 If there is not Tax Filing Status if there is a Tax Filing Record for the person, then populate 'Non-Filer' If there is not a Tax Filing Status and there is not a Filing Record for the person, then populate 'Unknown' <p><i>Note: See Supporting Document #3 for population values. Threshold population will be added for LRS with SCR CA-209050.</i></p>	<p>Arial Size 10 font.</p> <p>For example, "Married Filing Jointly"</p>
<MARRIED>	<p>The marital status of the person.</p> <p>Use database value PERS.MARITAL_STAT_CODE and CT622</p>	<p>Arial Size 10 font.</p> <p>For example, "Single"</p>

	<p><i>Note: See Supporting Document #3 for population values. Threshold population will be added for LRS with SCR CA-209050.</i></p>	
<PROP>	<p>The countable property.</p> <p>Use database value BUDGET.BEN_MO_PROP_AMT</p> <p>Note: If the property is \$0 this will populate \$0.00 on the NOA Fragment.</p>	<p>Arial Size 10 font, in a currency format.</p> <p>For example, "\$1,000.00"</p>
<CHILD>	<p>Populates with "Yes" if the person is receiving Non-MAGI benefits in the newly run EDBC, otherwise defaults to null (not visible).</p>	<p>Arial Size 10 font.</p> <p>For example, "Yes"</p>
<CITIZEN>	<p>The Citizenship/Immigration status of the person.</p> <p>Use database value</p> <ul style="list-style-type: none"> • If the person's birth country is the US or US territory populate with 'Citizen' • If the person does not have a birth country of US or US territory, then if there exists a Citizenship record use CITZ.TYPE_CODE and CT304. • If the person does not have a birth country of US or US territory and no Citizenship record exists for the person, then populate 'Unknown' <p><i>Note: See Supporting Document #3 for population values. Threshold population will be added for LRS with SCR CA-209050.</i></p>	<p>Arial Size 10 font.</p> <p>For example, "Citizen"</p>
<MAGI_SIZE>	<p>The MAGI household size used.</p> <p>Populates with the existing MAGI message logic: Use database value CH_ELIG_DETL.MAGI_SIZE</p>	<p>Arial Size 10 font, in a numerical format.</p> <p>For example, "3"</p>
<MAGI_INCOME>	<p>The MAGI income used.</p> <p>Populates with the existing MAGI message logic:</p>	<p>Arial Size 10 font, in a currency format.</p>

	Use database value CH_ELIG_DETL.MAGI_INC_AMT	For example, "\$1,000.00"
<MAGI_INCOME_LIMIT>	The MAGI income limit used. Populates with the existing MAGI message logic: Use database value CH_ELIG_DETL.MAX_MAGI_AMT	Arial Size 10 font, in a currency format. For example, "\$1,000.00"
<GROSS_INC>	The Gross Income Amount for non-MAGI. Populates with the sum of the following values from the database MC_BUDGET.UNEARN_INC_AMT MC_BUDGET.EARN_INC_AMT	Arial Size 10 font, in a currency format. For example, "\$1,000.00"
<NET_INC>	The Net Income Amount for non-MAGI. Populates with the existing non-MAGI SOC Budget logic: Use database value MC_BUDGET.TOTAL_NET_INC_AMT	Arial Size 10 font, in a currency format. For example, "\$1,000.00"
<M_NEED>	The Maintenance Need Amount for non-MAGI. Populates with the existing non-MAGI SOC Budget logic: Use database value BUDGET.MAINT_NEED_AMT	Arial Size 10 font, in a currency format. For example, "\$1,000.00"
<SOC_AMT>	The Share of Cost for non-MAGI. Populates with the existing non-MAGI SOC Budget logic: Use database value BUDGET.SHARE_OF_COST_AMT	Arial Size 10 font, in a currency format. For example, "\$1,000.00"

LRS: The Variables will expand to multiple lines of text when the population will not fit on a single line within the column width. See example below:



2.3.6 Add Regulations for new Reason Fragment

Add the following Regulations when generating the new Reason Fragment. This will generate in the MAGI Regulation Message (C-IV) or as part of a dynamically generated Section in the Reason (CalACES/LRS) for MAGI (see Recommendation 2.4) and in the Regulation Section on the Medi-Cal NOA for non-MAGI.

Medi-Cal Annual Renewal Reason Regulations:
W&I Code Section 14005.37; Title 42, CFR Section 435.916

2.3.7 Refactor Obsolete MAGI No Change Renewal Reason

Update the NOA logic to no longer generate the MAGI No Change Renewal Reason (C-IV: MSG_MAGI_RENEWAL_APPROVAL, LRS: H_AP_RENEWAL_NO_CHANGE_H903).

2.4 Add/Update MAGI Regulation Message Fragment for New Reason

2.4.1 Overview

The new Medi-Cal Annual Renewal Reason has regulations that generate for MAGI and mixed non-MAGI/MAGI NOAs. MAGI regulations are populated within the body of the NOA in a message following the applicable reason. This message will be generated for the new reason to display the reason's regulations for MAGI. Currently in LRS for Approvals and Changes the applicable regulations message is a part of the reason fragment.

2.4.2 Update MAGI Regulation Message Generation logic

C-IV:

Add generation logic to generate the MAGI Regulation Message fragment (MSG_MAGI_APPROVAL_OR_CHANGE_REGULATION) following each instance of the new Medi-Cal Annual Renewal Reason for MAGI NOAs. It should populate with the regulations listed in Recommendation 2.3.6.

Note: For LRS the regulations will be generated via the existing Variable regulation logic. The Variable will generate as a dynamic section below the Reason Fragment. See Supporting Documents #6 for Reason FDD with Variable Section.

2.5 Create new Medi-Cal NOA Footer Message Fragment

2.5.1 Overview

A new Medi-Cal Footer Message fragment will be created. New logic will be added to generate this new Footer Message when the NOA generating is an Approval, Change, or the new No Change Renewal NOA (see Recommendation 2.1) for non-MAGI, MAGI and mixed non-MAGI/MAGI NOAs. There will be a dynamic section that generates for non-MAGI and mixed non-MAGI/MAGI NOAs. The existing NOA MAGI Footer Message will be suppressed when this new fragment generates. For C-IV the non-MAGI existing report income within 10 days fragment will be replaced with this new Footer Message.

2.5.2 Create a new Medi-Cal Footer Fragment

Create a new Medi-Cal Footer Message fragment. It will contain the main fragment text as well as a dynamically generated section.

This fragment will be added in:

C-IV:

English and threshold languages – Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

LRS:

English and threshold languages that currently have Medi-Cal NOA templates for generation - Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese.

Description	Text	Formatting*
Main Fragment	<p>Do you have any changes?</p> <p>Over the next year, you must report any life changes that affect your eligibility for Medi-Cal. You must report within 10 days after the change happened. For example, you must contact us if:</p> <ul style="list-style-type: none"> • Your income changes. • Your household changes, such as you marry, divorce, become pregnant, or have or adopt a child; a person moves into or out of your home; or you change who will be on your tax return. • You qualify for other health insurance. • You move. If you move to a new county, you can report your change to your old or new county. <p>{PROP_SECTION}</p> <p>You may report changes to your local county office in person or by mail, fax, phone, or electronically. The contact information is on the first page of this notice.</p>	<p>The first sentence will generate in Bold Arial size 10 font.</p> <p>The third sentence the number “10” will generate in Bold Arial size 10 font.</p> <p>The rest of the fragment text will generate in Arial size 10 font.</p>
Dynamic Section {PROP_SECTION}	<ul style="list-style-type: none"> • Your property changes. 	Arial size 10 font

2.5.3 Update Existing NOA Footer logic for new Footer Message

Update the Fragment generation logic for non-MAGI, MAGI, and mixed non-MAGI/MAGI NOAs. This new Footer Message fragment will generate when the MC NOA generated is an Approval, Change, or the new No Change Renewal NOA (see Recommendation 2.1).

Note: For C-IV, the new Footer Message will generate failure for Over MAGI Income when generating on a Change NOA. LRS currently only generates this reason on Discontinuance NOAs and will not be impacted with this effort.

When the new Footer Message fragment generates on a MAGI or mixed non-MAGI/MAGI NOA the existing MAGI footer will be suppressed (C-IV: MSG_MAGI_FOOTER_MESSAGE, CalACES/LRS: H_STATIC_FOOTER).

C-IV: Update the NOA logic to no longer generate the non-MAGI Report Income within 10 Days fragment to prevent repetitive verbiage on the NOA. (MC_MSG_REPORT_INCOME_WITHIN_10_DAYS).

Note: LRS will generate the new Medi-Cal Footer Message once for each NOA pdf generated in the system. For example, if there is a non-MAGI NOA and a MAGI NOA that are being generated for the mixed NOA the footer would generate once for non-MAGI and once for MAGI with this enhancement. This will be updated with SCR CA-204496 which will merge the non-MAGI and MAGI fragments onto the same pages.

See Supporting Documents #7 for FDD and Supporting Documents #8 for mixed non-MAGI/MAGI Example NOA.

2.5.4 Add Dynamic Section Generation Logic

Create the following generation logic for the Section within the new Footer Message fragment:

Section	Generation Conditions
{PROP_SECTION}	<p>This section generates for non-MAGI or mixed non-MAGI/MAGI NOAs.</p> <p>Note: CalACES/LRS will generate the new MC Annual RE Message/Footer once for non-MAGI and once for MAGI when generating a mixed non-MAGI/MAGI NOA with this enhancement. The PROP_SECTION will only generate on the non-MAGI part of the mixed NOA. This will be updated with SCR CA-204496 which will merge the non-MAGI and MAGI fragments onto the same pages.</p>

2.6 Add NOA Title and Footer Reference for new Reason

2.6.1 Overview

A NOA title and NOA footer name is required for the new Annual Renewal NOA. The NOA title will list the NOA as an Approval and the NOA footer will reference the NOA as a Medi-Cal Renewal.

2.6.2 Add Approval NOA title

Add logic to generate the NOA title "MEDI-CAL APPROVAL" when the Annual Renewal Reason (Recommendation 2.3) is on the NOA.

The NOA title population will generate in:

C-IV:

English and threshold languages – Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

LRS:

English and threshold languages that currently have Medi-Cal NOA templates for generation - Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese.

See Supporting Documents # 1, 2, and 8 for NOA Examples.

Note: The NOA title will only generate for non-MAGI NOAs in C-IV as the MAGI NOA template (used for MAGI and mixed non-MAGI/MAGI) does not have title generation. This enhancement will not add new title functionality to this existing NOA template.

2.6.3 Add Annual Renewal NOA footer

LRS:

Add logic to generate the NOA reference "MC NO CHANGE RE" in the footer of the NOA when the Annual Renewal Reason (Recommendation 2.3) is on the NOA.










See Supporting Documents # 1, 2, and 8 for NOA Examples.






Note: C-IV Medi-Cal NOAs (non-MAGI, MAGI, mixed non-MAGI/MAGI) also do not have logic to populate a Form number at the bottom of the NOA. This enhancement will not add new footer functionality to these existing NOA templates.

3 SUPPORTING DOCUMENTS

Note: All Dynamic NOA Examples are provided for a visual idea of positioning, population formatting, and possible surrounding Fragments. They include test data (fake names, dates, etc.) for population that may not be true values in production (addresses, income limits, etc.). Any SCRs that are in progress or being completed after the Examples were created are not included within the Examples.

Number	Functional Area	Description	Attachment
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1	NOA	<p>Annual Renewal MAGI Example</p> <p>Example Case:</p> <ul style="list-style-type: none"> • Child Responsible - Yes, • Pregnancy - No, • Unverified Citizenship – Yes <p><i>(example excludes the NA Back 9 that will generate on the back of the first page)</i></p>	<p>C-IV:</p>  <p>CA-202724 CIV-100708 MAGI Ex</p> <p>CalACES/LRS:</p>  <p>CA-202724 CIV-100708 MAGI Ex</p>
2	NOA	<p>Annual Renewal Non-MAGI Example</p> <p>Example Case:</p> <ul style="list-style-type: none"> • Blind or Disabled – Yes, • Pregnant – Yes, • Child Responsible – No • Unverified Citizenship – No • Share of Cost - Yes <p><i>(example excludes the NA Back 9 that will generate on the back of the first page)</i></p>	<p>C-IV:</p>  <p>CA-202724 CIV-100708 Non MA</p> <p>CalACES/LRS:</p>  <p>CA-202724 CIV-100708 Non MA</p>
3	NOA	Variable Population	 <p>CA-202724 CIV-100708 Populati</p>
4	NOA	New Action for Annual Renewal FDD	 <p>NOA_MC_ANNUAL_RENEWAL_ACTION_F</p>
5	NOA	New Individual Action for Annual Renewal FDD	 <p>NOA_MC_ELIG_INDIVIDUAL_ACTION_FDI</p>
6	NOA	New Reason for Annual Renewal FDD	 <p>NOA_MC_ANNUAL_RENEWAL_RSN_FDD</p>
7	NOA	New Approval/Change Footer Message FDD	 <p>NOA_MC_AP_CH_FOOTER_MSG_FDD.d</p>

8	NOA	<p>Mixed non-MAGI/MAGI NOA Example</p> <p>Example Case:</p> <ol style="list-style-type: none"> 1. Non-MAGI Person <ul style="list-style-type: none"> • Blind or Disabled – Yes, • Pregnant – Yes, • Child Responsible – No • Unverified Citizenship – No • Share of Cost – Yes 2. MAGI Person <ul style="list-style-type: none"> • Child Responsible - Yes, • Pregnancy - No, • Unverified Citizenship – Yes <p><i>(example excludes the NA Back 9 that will generate on the back of the first page)</i></p>	<p>C-IV:</p>  <p>CA-202724 CIV-100708 Mixed Ex</p> <p>CalACES/LRS:</p>  <p>CA-202724 CIV-100708 Mixed Ex</p>
9	NOA	<p>C-IV Medi-Cal Change NOA Example</p> <p>Example Case:</p> <ul style="list-style-type: none"> • Blind or Disabled – No, • Pregnant – Yes, • Child Responsible – Yes • Unverified Citizenship – No • Share of Cost – No <p>Note: CalACES/LRS does not currently support the ability to merge Medi-Cal NOAs. There are future SCRs (CA-204496 and CA-204497) that will add the ability to merge the Annual Renewal Reason with existing mixed non-MAGI/MAGI NOAs.</p> <p><i>(example excludes the NA Back 9 that will generate on the back of the first page)</i></p>	 <p>CA-202724 CIV-100708 Non-MA</p>
10	NOA	<p>Two Person MAGI NOA Example</p> <p><i>(example excludes the NA Back 9 that will generate on the back of the first page)</i></p>	<p>C-IV:</p>  <p>CA-202724 CIV-100708 MAGI Tw</p> <p>LRS:</p>  <p>CA-202724 CIV-100708 MAGI Tw</p>

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>ACL 19-03 is requiring a new Annual Renewal (Redetermination) NOA. This effort will automate the new NOA in the CalACES/LRS system (meets requirement section b).</p>

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

None

7 APPENDIX

N/A



Design Document

CA-206854 CIV-8470 – Add and Remove Staff
Classification Titles



DOCUMENT APPROVAL HISTORY	
Prepared By	Robert Untalan
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/06/2019	V1.0	Initial Draft for Committee Review	Robert Untalan

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1 OVERVIEW

The Classification Title is used to categorize Staff. This enhancement will bring the system in line with the current Staff Classification Titles used in the counties.

1.1 Current Design

Staff Records are created and maintained on the Staff Detail page. The list of available Classification Titles are available on this page and is required for a Staff record to be created.

1.2 Requests

Update the Classification Titles available for each county to match the values provided through the CRFI process.

1.3 Recommendations

Update the available Classification Titles for Staff members to match the request by each county. For the LRS system, add the C-IV Classification Titles. These added Classification Titles will only be validated through the database using the code detail table. For Counties removing Classification Titles, set the Staff to have the Classification Title of 'Temporary Employee' and provide a list of these users to the counties.

1.4 Assumptions

- Only requested Classification Titles for Staff records will be updated.
- Only counties that have requested Classification Titles updates will have their Classification Titles updated.
- The counties that have requested the removal of Classification Titles will have existing staff members assigned to the 'Temporary Employee' Classification Title and will have that Classification Title enabled for their county.

2 RECOMMENDATIONS

2.1 Staff Detail

2.1.1 Overview

The Staff Detail page allows the user to view, edit, and add Staff records. These records set the Classification Title for the Staff member.

2.1.2 Staff Detail Mockup

Staff Detail

*- Indicates required fields

Save Cancel

General Staff Information

First Name:	<input type="text"/>	Middle Name:	<input type="text"/>	Last Name: *	<input type="text"/>	Suffix:	<input type="text"/>	
Staff Status Code: *	<input type="text"/>	Classification Title: *	<ul style="list-style-type: none">- Select -Accountant IAccountant IIAccountant IIIAccountant TechnicianAdministration Supervisor IAdministration Supervisor IIAppeals SpecialistAssistant Auditing ManagerAssistant Communications SpecialistAssistant to the DirectorAssociate Administration OfficerAuditing ManagerAutomated Systems Analyst IAutomated Systems Analyst IIAutomated Systems TechnicianBuilding & Services ManagerBusiness AnalystBusiness Applications ManagerBusiness Systems Analyst IBusiness Systems Analyst IIBusiness Systems Analyst IIICase Review SpecialistChief ArchivistChief Learning OfficerCommunications and Career Services ManagerDepartment Information Service ManagerDeputy Administrative OfficerDeputy DirectorDirector				Staff ID:	<input type="text"/>
Regional Call Center:	<input type="text"/>							
Available Hours: (Day-Day Time)	<input type="text"/>							
Additional Information:	<input type="text"/>							

Spoken Language Information

Spoken Language *	<input type="text"/>	Proficiency *	<input type="text"/>	<input type="button" value="Add"/>
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Written Language Information

Figure 2-1 Staff Detail Classification Title drop down

2.1.3 Description of Changes

Add and remove values in Staff Detail page's Classification Title field drop down as requested for each county, refer to titled document 'Added and Removed County Staff Classifications' in the Supported Documents section.

2.1.4 Page Location

Global:Tools

Local:Office

Task:Staff

2.1.5 Page Usage/Data Volume Impacts

No change.

2.2 Data Change: Setting default value for removed Classification Titles.

2.2.1 Overview

This data change will associate a Classification Title for users assigned a title that is no longer available in the county.


2.2.2 Description of Change

Update Staff member's Classification Title to the value of 'Temporary Employee' when the Classification Title is no longer available. For Counties that do not have 'Temporary Employee' available, make the Classification Title available.

2.2.3 Estimated Number of Records Impacted/Performance

- LRS no change.
- C-IV, about 3,500 records will be associated to value of 'Temporary Employee'.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Online	Added and Removed Classification Titles. Updated titles are highlighted in Yellow. Added titles are highlighted in Green.	 Added and Removed County St:

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.25.1.3	The LRS shall maintain information on all COUNTY staff and any appropriate staff from other LRS agencies that access LRS cases and/or LRS Data.	Updates will maintain information on all COUNTY staff.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met
	N/A	

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
		N/A			

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6 OUTREACH: CIV ONLY

Provide a list for all users that have had their Classification Title removed and associated to Classification Title of 'Temporary Employee'. The list will contain County Code, Staff ID, First Name, Last Name, Email Address, and Phone Number.

I.E.

County Code	Staff ID	First Name	Last Name	Email Address	Phone Number
50	111111	Bruce	Wayne	wbruce@wenterprise.org	(555)555-5555

Add below text on the posted list 'County Action' tab:
Counties should review the Staff to reevaluate the Staff Classification and determine if updates will need to be made from the Staff Detail page.

Lists will be posted at following location:

CalACES Web Portal>System Changes>SCR and SIR Lists>2019>CIV-8470

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