



## **Design Document**

CA-203981 | CIV-102151 Add New Non-MAGI  
Screening Packet and Turning 65 Screening  
Packet to LRS



**DOCUMENT APPROVAL HISTORY**

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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/23/2019	1.0	Initial Design	Nithya Chereddy
08/06/2019	1.1	Added MC EDBC Rules updates for Packet Status	Tisha Mutreja
09/10/2019	1.2	C-IV only: Updated the Short description both the screening packets and added due date population for Turning 65 packet coversheet	Nithya Chereddy
09/19/2019	1.3	LRS; Updated return envelope to BRM for the Screening packets	Nithya Chereddy
09/23/2019	1.4	Updated the Numerator and Denominator definitions for the Customer Reporting Reports.	Esequiel Herrera-Ortiz
09/27/2019	1.5	Updated section 2.8 on the EDMS Form ID	Howard Suksanti
10/02/2019	1.6	Updated the Non-MAGI Informing Letter in Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet	Nithya Chereddy
10/03/2019	1.7	Updated section 2.4.2.4 to add a check that there are no MC RE Packets	Renee Gustafson

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# 1 OVERVIEW

The Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet should be present in The Systems with the latest version of the forms for Non-MAGI screening purposes.

This SCR will update the following pages and reports in LRS to include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet information.

Pages	Reports
Customer Reporting List	Reporting Progress Reports
Customer Reporting Detail	Customer Reporting Progress Detail Report
Monthly Productivity List	Monthly Productivity List Export

Finally, the design between the LRS and C-IV versions of the Customer Reporting Progress Report and the Customer Reporting Progress Detail Report will be aligned.

## 1.1 Current Design

**C-IV:** The Non-MAGI Screening Packet and Non-MAGI Screening Aged 65 Redetermination Packet are available in the Template repository.

An automated daily batch job sends the Non-MAGI Screening Packet to customers whose MAGI determination comes back as MAGI Eligible with an Eligibility Evaluation Reason of 'Soft Pause'. An automated monthly batch job sends the Non-MAGI Turning 65 Packet to customers who turn 65 the month following the batch run.

The Customer Reporting Report and the Customer Reporting Progress Detail Report reference the packet name 'Non-MAGI Screening Aged 65 Redetermination Packet'. These reports inflate the 'Overall % Complete' and '% of Reports Completed' totals due to using the 'Not Applicable' Packet status in the calculation.

The Monthly Productivity List, Customer Reporting List and Customer Reporting Detail pages reference the 'Non-MAGI Packet' and 'Non-MAGI Screening Aged 65 Packet'.

**LRS:** The Non-MAGI Screening Packet does not exist in LRS.

An automated monthly batch job sends the 'Additional Income and Property Information Needed for Medi-Cal' (Non-MAGI Turning 65 Packet) to customers who turn 65 the month following the batch run. The 'Additional Income and Property Information Needed for Medi-Cal' Packet consists of a Cover Letter and the MC 604 IPS form.

The Customer Reporting Progress Report, Customer Reporting Progress Detail Report and the Monthly Productivity List Export report do not include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet information.

The Monthly Productivity List, Customer Reporting List and Customer Reporting Detail pages do not include Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet.

## 1.2 Requests

**C-IV:** Update the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet with the latest version of the forms.

Update the Customer Reporting Progress Report and the Customer Reporting Progress Detail Report to reference the new name for the Non-MAGI Turning 65 Packet.

Update Customer Reporting Progress Report and the Customer Reporting Progress Detail Report in C-IV correct the inflation issue for the 'Overall % Complete' and '% of Reports Completed' totals caused by using the 'Not Applicable' status in the calculation.

Update the Monthly Productivity List, Customer Reporting List and Customer Reporting Detail pages to reference the updated Packet names.

**LRS:** Add the Non-MAGI Screening Packet with all the required forms to the Template repository. Rename the 'Additional Income and Property Information Needed for Medi-Cal' to 'Non-MAGI Turning 65 Packet' and add the required forms to the Packet.

Update the Customer Reporting Progress Report, Customer Reporting Progress Detail Report and the Monthly Productivity List Export Report to include the Non-MAGI Screening Packet and the Non-MAGI Turning 65 Packet information. Also, update the Customer Reporting Progress Report and Customer Reporting Progress Detail Report to align to the C-IV version of the report.

Update the Monthly Productivity List, Customer Reporting List and Customer Reporting Detail pages to include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet.

### 1.3 Overview of Recommendations

1. Add/update Non-MAGI Screening Packet with the latest version of the required forms.
2. Rename the Additional Income and Property Information Needed for Medi-Cal in LRS and Non-MAGI Screening Aged 65 Redetermination Packet in C-IV to Non-MAGI Turning 65 Packet.
3. Update the Non-MAGI Turning 65 Packet with latest versions of the required forms.
4. **LRS only:** Create a Journal entry when the Non-MAGI Screening Packet or Non-MAGI Turning 65 Packet is generated.
5. **C-IV only:** Update the Journal entry Long Description for the Non-MAGI Screening Packet or Non-MAGI Turning 65 Packet to list all the forms included in the Packet.
6. Update the Packet status in Customer Reporting to "Complete - EDBC Accepted" when the Packet is returned and EDBC is Accepted and Saved.
7. Generate a task assigned to the Program Worker, when the Non-MAGI Screening Packet or the Non-MAGI Turning 65 Packet is scanned through Kofax or imaged through YBN.
8. **C-IV only:** Update the Customer Reporting reports to reference the new name for the Non-MAGI Turning 65 Packet and update the logic for the 'Overall % Complete' and '% of Reports Completed' totals.
9. **LRS only:** Update Reports to include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet information. Also, close differences between the C-IV and LRS version of the Customer Reporting Progress Report and the Customer Reporting Detail Report.
10. Update the Monthly Productivity List, Customer Reporting List and Customer Reporting Detail pages to include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet information.

### 1.4 Assumptions

1. SCR **CA-58123** will create a batch job to automatically generate the Non-MAGI Screening Packet when a person is skipped through batch for 'Soft Pause' and the DER Run Reason code is 'RE' - LRS Only
  - o **Note:** C-IV already has a batch job (PB00R526) which looks at the Soft Pause indicator to generate the Non-MAGI Screening Packet.
2. **LRS only:** LRS will generate the Non-MAGI Turning 65 packet with all the required forms. Business Data Inc. (BDI) will stuff the GEN 1365 for the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet until CA-202307 | C-IV-10774 is implemented.
3. **LRS Only:** Distributed documents List page will reflect the updated form number and form name (mentioned below in recommendations 2.2.1.1) for "Additional Income and Property Information Needed for Medi-Cal (VCL 65)" records which were created before the implementation of this SCR along with the records created after the implementation of this SCR.

4. **C-IV Only:** Distributed documents List page will reflect the updated form number and form name (mentioned below in recommendations 2.1.1.7 and 2.2.1.7) for "Non-MAGI Screening Packet" and "Non-MAGI Screening Turning 65 Redetermination Packet" records which were created before the implementation of this SCR along with the records created after the implementation of this SCR.
5. The due date for the Non-MAGI Turning 65 Packet for C-IV is 30 days from the packet generation date whereas for LRS due date is the 10<sup>th</sup> day of the individual's birth month. This is existing functionality in both systems and this gap will not be addressed through this SCR.  
**LRS:** If the Person turns 65 anytime in July, the Non-MAGI Turning 65 Packet will be sent on June 1<sup>st</sup> and the due date on the MC 604 IPS form will be July 10<sup>th</sup>.  
**C-IV:** If the Person turns 65 anytime in July, the Non-MAGI Turning 65 Packet will be sent on June 3<sup>rd</sup> and the return date will be July 3<sup>rd</sup> (Packet Generation date + 30 days).
6. **LRS only:** Any Additional Income and Property Information Needed for Medi-Cal (VCL 65) packets with current status as 'Generated' or 'Sent' as of the implementation of this SCR will follow the existing logic which tracks the form through the Document Detail page.
7. **C-IV Only:** SCR 10668 added the recommendation to create a task when the Non-MAGI Turning 65 Packet is received, but a task is not being created currently. Production defect CIV-104616 has been logged to address this issue with the targeted fix version of 19.11



## 2 RECOMMENDATIONS

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### 2.1 Non-MAGI Screening Packet

#### 2.1.1 Template Repository

##### **LRS only**

1. Add the Non-MAGI Screening Packet in English and Spanish to the Template Repository.
  - Form Number: Non-MAGI Scrn Pkt
  - Form Name: Non-MAGI Screening Packet
2. Include the following parameters for the Non-MAGI Screening Packet in the Document Parameters page:
  - Case Number
  - Customer Name
  - Program
  - Language
  - Submit Month
3. Include the following forms in the Non-MAGI Screening Packet in the order mentioned below:
  - Cover letter (New form – Reference Supporting Document #3)
  - Non-MAGI Informing Letter (New form – Reference Supporting Document #5)
  - MC 604 IPS (Existing Form–Reference Supporting Document #6)
  - MC 007 (Update the existing form with the Supporting Document #7)
  - PUB 10 (Existing Form-Reference Supporting Document #8)
  - DHCS 7077 (Update the existing form with the Supporting Document #9)
  - DHCS 7077A (Existing Form-Reference Supporting Document #10)
  - APTC/CSR Brochure (New form – Reference Supporting Document #11)
  - Voter Registration Cardstock (VRC)

**Note:** The VRC is manually inserted at BDI. The form will not appear in the saved packet viewed in LRS.
4. Include the State standard header on the first and second page of the coversheet.
5. Mail the Non-MAGI Screening Packet using a Flat mail envelope with a BRM (Business Reply Mail) envelope.

**Note:** C-IV sends the Non-MAGI Screening Packet in a Flat Mail envelope with BRM.
6. The following Print Options will be available when the Non-MAGI Screening Packet is generated in the context of the case.
  - Print Locally
  - Print Centrally

The Document could be Printed Locally without Saving if a blank template is generated.

**Note:** Supporting document #14 is the FDD for Non-MAGI Screening Packet.

**C-IV only**

7. Add the PDF version of DHCS 7077 to the Template Repository.
8. Update the Form Number in the Template Repository for Non-MAGI Screening Packet from Non-MAGI Packet to 'Non-MAGI Screening Packet' (DOC\_TEMPL ID: 1687)
9. Update the Non-MAGI Screening Packet to include the updated versions of the MC 007, add the DHCS 7077 and update the order of the forms as follows:
  - Coversheet (Existing Form - Reference Document #12)
  - Non-MAGI Informing Letter (Existing Form-Reference Supporting Document #5)
  - MC 604 IPS (Existing Form)
  - MC 007 (Update the existing form with the Supporting Document #7)
  - PUB 10 (Existing Form-Reference Supporting Document #8)
  - DHCS 7077(New Form – reference Supporting Document #9)
  - DHCS 7077A (Existing Form-Reference Supporting Document #10)
  - APTC/CSR Brochure (New form – Reference Supporting Document #11)
  - VRC (inserted at the Print Center)

**2.1.2 Variable Population**

1. LRS Only: Populate the MC 604 IPS form and Non-MAGI Informing Letter with the following values:
  - Non-MAGI Informing Letter

Variable	Description	Population
<b>Person's Name</b>	Name of the Primary Applicant on the Program	Person's Name
<b>Due Date</b>	Due date by which the verifications must be sent back	Populate the verification due date by adding 30 days to the Packet generation date. If the 30 <sup>th</sup> day falls on a weekend or on a County holiday, move the due date to the next business day.

<b>Persons Names</b>	Names of all the active persons	Populate the names of all the active persons on the Medi-Cal case as comma separated values.  Example: Test 1, Test 2, Test 3
<b>Benefits End Date</b>	Redetermination end date	Populate the Redetermination end date  i.e DUE_DATE from the REDETER table.
<b>Hearing Address</b>	County's hearing office address	County's hearing office address

- MC 604 IPS form Variable Population

<b>Variable</b>	<b>Description</b>	<b>Population</b>
Case Name	Name of the Primary Applicant on the Program	Person's Name
Case Number	Case number for which the packet is generated	Case Number
Worker's Name	Name of the Worker associated to the program	Worker's Name
Worker's Phone Number	Phone number associated to the worker	Worker's Phone Number
Date Sent	The date when packet is generated	Packet Generation Date
Verification Due Date	Due date by which the verifications must be sent back	Populate the verification due date by adding 30 days to the Packet generation date. If the 30 <sup>th</sup> day falls on a weekend or on a County holiday, move the due date to the next business day.

2. **C-IV only:** Update the existing logic which populates the Due Date on the MC 604IPS and Non-MAGI Informing Letter. Currently in C-IV, the due date is populated by adding 30 days to the packet generation date. This functionality should be updated to push the due date to the next business day if the due date falls on a weekend or on a County Holiday.

### 2.1.3 Barcode Generation (LRS only)

1. Generate a barcode on the second page of the Non-MAGI Screening Packet cover letter as follows:
  - 1st 7 Digits will be the case number.
  - Next 2 digits will be 00
  - Next 2 digits are populated as the Form ID **XX (Implementation TBD)** from CT-329.
  - Next 2 digits are populated as month (MM) derived based on the Due date of Non-MAGI Screening Packet.
  - Next 4 digits are populated as year (YYYY) derived based on the Due date of Non-MAGI Screening Packet Form.
  - Next 10 digits are populated as the GENERATE\_DOC\_ID from the database.

**Note:** C-IV currently generates barcode for the Non-MAGI Screening Packet.

### 2.1.4 Journal Entry

1. **LRS only:** Add the following custom Journal entry when the for Non-MAGI Screening Packet is generated through Online

**Journal Category:** All

**Journal Type:** Document

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

**Long description:** The following forms were included for the {redateDate} 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. **C-IV only:** Update the Custom Journal entry Long description and Short description for the Non-MAGI Screening Packet as follows:

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

**Long description:** The following forms were included for the {redateDate} RE: Coversheet, 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.

## 2.1.5 Forms Overview

1. Update the Forms Overview in the Online Help page.

Field Name	C-IV	LRS
<b>Form Number</b>	Non-MAGI Screening Packet	Non-MAGI Scrn Pkt
<b>Form Name</b>	Non-MAGI Screening Packet	Non-MAGI Screening Packet
<b>Form Description</b>	The following forms are included in this packet: Coversheet, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077A, APTC CSR Brochure, and VRC.	The following forms are included in this packet: Cover Letter, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077A, APTC CSR Brochure, and VRC.

## 2.2 Update Non-MAGI Turning 65 Packet

### 2.2.1 Template Repository

#### LRS only

1. Rename the Form Name and Form Number for 'Additional Income and Property Information Needed for Medi-Cal Packet' (DOC\_TEMPL ID 6253) as follows:
  - Form Number – Non-MAGI Turning 65
  - Form Name – Non-MAGI Turning 65 Packet
2. Turn off the threshold language availability for the Non-MAGI Turning 65 Packet as it will only be available in English and Spanish.
3. Include the following parameters for the Non-MAGI Turning 65 Packet in the Document Parameters page:
  - Case Number
  - Customer Name
  - Program
  - Submit Month (New field)
  - Language
4. Update the Non-MAGI Turning 65 Packet to contain all the forms in the following order
  - Cover Letter (Updated form – reference document #4)
  - Non-MAGI Informing Letter (New form – reference Supporting Document #5)
  - MC 604 IPS (Existing Form–reference Supporting Document #6)
  - MC 007 (Update the existing form with the Supporting Document #7)
  - PUB 10 (Existing Form-reference Supporting Document #8)
  - DHCS 7077 (Update the existing form with the Supporting Document #9)

- DHCS 7077A (Existing Form-reference Supporting Document #10)
- VRC

**Note:** The VRC is manually inserted at BDI. The form will not appear in the saved packet viewed in LRS.

5. Include the State standard header on the first and second page of the coversheet.
6. Mail the Non-MAGI Turning 65 Packet using a Flat mail envelope with a BRM (Business Reply Mail) envelope.

**Note:** C-IV sends the Non-MAGI Turning 65 Packet in a Flat Mail envelope with BRM.

7. The following Print Options will be available when the Non-MAGI Turning 65 Packet is generated in the context of the case.
  - Print Locally
  - Print Centrally

The Document can be Printed Locally without Saving if a blank template is generated.

**C-IV only**

8. Update the Form Name and Form Number for the “Non-MAGI Screening Turning 65 Redetermination Packet” (DOC\_TEMPL ID 1776) as follows:
  - Form Number: Non-MAGI Turning 65 Packet
  - Form Name: Non-MAGI Turning 65 Packet
9. Update the Non-MAGI Turning 65 Packet to include the updated versions of the Non-MAGI Informing Letter, MC 007 and add DHCS 7077 and update the order of the forms as follows:
  - Coversheet (Existing Form – Reference Document #13)
  - Non-MAGI Informing Letter (Update the existing form with Supporting Document #5)
  - MC 604 IPS (Existing Form)
  - MC 007 (Update the existing form with the Supporting Document #7)
  - PUB 10 (Existing Form-Reference Supporting Document #8)
  - DHCS 7077(New Form – reference Supporting Document #9)
  - DHCS 7077A (Existing Form-Reference Supporting Document #10)
  - VRC (inserted at the Print Center)

**2.2.2 Variable Population**

1. LRS only: Populate the MC 604 IPS form and Non-MAGI Informing Letter with the following values:
  - Non-MAGI Turning 65 Cover Letter

Variable	Description	Population
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<b>Return by date</b>	Date by which the verifications must be sent back	Due date is the 10th day of the Individual's Birth Month (Existing Functionality)  NOTE: The due date for the MC 604 IPS must not be a weekend or holiday. If due date lands on one of these days, the due date will be the next business day
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- Non-MAGI Informing Letter

Variable	Description	Population
<b>Person's Name</b>	Name of the Primary Applicant on the Program	Person's Name
<b>Due Date</b>	Due date by which the verifications must be sent back	Due date is the 10th day of the Individual's Birth Month (Existing Functionality)  NOTE: The due date for the MC 604 IPS must not be a weekend or holiday. If due date lands on one of these days, the due date will be the next business day.
<b>Persons Names</b>	Names of all the active persons	Populate the names of all the active persons on the Medi-Cal case as comma separated values.  Example: Test 1, Test 2, Test 3
<b>Benefits End Date</b>	Redetermination end date	Populate the Redetermination end date  i.e DUE_DATE from the REDETER table.
<b>Hearing Address</b>	County's hearing office address	County's hearing office address

- MC 604 IPS form Variable Population

Variable	Description	Population
<b>Case Name</b>	Name of the Primary Applicant on the Program	Person's Name
<b>Case Number</b>	Case number for which the packet is generated	Case Number
<b>Worker's Name</b>	Name of the Worker associated to the program	Worker's Name
<b>Worker's Phone Number</b>	Phone number associated to the worker	Worker's Phone Number
<b>Date Sent</b>	The date when packet is generated	Packet Generation Date
<b>Verification Due Date</b>	Due date by which the verifications must be sent back	Due date is the 10th day of the Individual's Birth Month (Existing Functionality)  NOTE: The due date for the MC 604 IPS must not be a weekend or holiday. If due date lands on one of these days, the due date will be the next business day

2. **C-IV only:** Update the existing logic which populates the Due Date on the Coversheet, MC 604IPS and Non-MAGI Informing Letter. Currently in C-IV, the due date is populated by adding 30 days to the packet generation date. This functionality should be updated to push the due date to the next business day if the due date falls on a Weekend or on a County Holiday.
3. **C-IV Only:** Update the existing logic for Non-MAGI Informing letter which populates the name of the Primary applicant under the variable <Persons names> to populate the all the active members in Medi-Cal Program.

- Non-MAGI Informing Letter

Variable	Description	Population
<b>Person's Name</b>	Name of the Primary Applicant on the Program	Person's Name



<b>Due Date</b>	Due date by which the verifications must be sent back	Populate the verification due date by adding 30 days to the Packet generation date. If the 30 <sup>th</sup> day falls on a weekend or on a County holiday, move the due date to the next business day.
<b>Persons Names</b>	Names of all the active persons	Populate the names of all the active persons on the Medi-Cal case as comma separated values.  Example: Test 1, Test 2, Test 3
<b>Benefits End Date</b>	Redetermination end date	Populate the Redetermination end date  i.e DUE_DATE from the REDETER table.
<b>Hearing Address</b>	County's hearing office address	County's hearing office address

### 2.2.3 Barcode Generation (LRS only)

1. Use the existing barcode generation logic on VCL 65 to populate the barcode on the second page of the updated Non-MAGI Turning 65 Coversheet.

**Note:** C-IV currently generates barcode for the Non-MAGI Turning 65 Packet.

### 2.2.4 Journal Entry

1. **LRS only:** Create the following custom Journal entry for Non-MAGI Turning 65 Packet when generated through online or batch

**Journal Category:** All

**Journal Type:** Document

**Short Description:** Non-MAGI Turning 65 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 and VRC. These items are due in 30 days.

2. **C-IV only:** Update the Journal entry Long Description and Short description when the Non-MAGI Turning 65 Packet is generated through online or batch as follows:

**Short Description:** Non-MAGI Turning 65 Packet

**Long Description:** The following forms were included for the {redeterDate} RE: Coversheet with BRM and NVRA, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077A and VRC. These items are due in 30 days.

### 2.2.5 Forms Overview

1. Update the Forms Overview in Online Help page.

Field Name	C-IV	LRS
<b>Form Number</b>	Non-MAGI Turning 65 Packet	Non-MAGI Turning 65
<b>Form Name</b>	Non-MAGI Turning 65 Packet	Non-MAGI Turning 65 Packet
<b>Form Description</b>	The following forms are included in this packet: Coversheet, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077A, and VRC.	The following forms are included in this packet: Cover Letter, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077A, and VRC.

**Note:** Supporting document # 15 is the FDD for Non-MAGI Turning 65 Packet.

### 2.3 Customer Reporting (LRS Only)

1. Create a Customer Reporting entry when the Non-MAGI Screening Packet is generated from online or the Non-MAGI Turning 65 is generated through online or batch.

Populate the Customer Reporting List Page as follows:

Fields to Populate	Population for Non-MAGI Screening Packet	Population for Non-MAGI Turning 65 Packet
<b>Type</b>	Non-MAGI Screening Packet	Non-MAGI Turning 65 Packet
<b>Submit Month - when generated from Online</b>	Submit Month from Document Parameter Page	Submit Month from Document Parameter Page
<b>Submit Month - when generated through Batch</b>	N/A	Birth Month of the Individual for whom the

		packet is being generated for.
<b>Program</b>	MC	MC
<b>Status</b>	Customer Reporting Tracking Status Example: "Generated" if the packet is generated from Online. "Sent" if the Packet is sent to the Customer	Customer Reporting Tracking Status Example: "Generated" if the packet is generated from Online. "Sent" if the Packet is sent to the Customer
<b>Status Date</b>	Date when the latest status is updated	Date when the latest status is updated

2. Technical Recommendation: Rename the SHORT\_DECODE\_NAME for CODE\_DETL 329, CODE\_NUM\_IDENTIF NM to Non-MAGI Screening Packet. Values for REFER\_TABLE\_1\_DESCR through REFER\_TABLE\_6\_DESCR are TBD based on the build implementation.

DRAFT

## 2.4 Medi-Cal EDBC Rules Update (LRS only)

### 2.4.1 Overview

Update the Medi-Cal EDBC rules to mark the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet with status 'Complete - EDBC Accepted' after Medi-Cal EDBC is accepted and saved. The Packets will be included in the list of valid MC RE packets for auto-setting the EDBC Run Reason to 'RE'.

### 2.4.2 Description of Changes

1. Update the Medi-Cal EDBC rules to update the Non-MAGI Screening Packet status to 'Complete - EDBC Accepted' when all the following are true:
  - a. EDBC is run with the Run Reason of 'RE'
  - b. Non-MAGI Screening Packet submit month equals the Medi-Cal program's RE Due month
  - c. Latest Non-MAGI Screening Packet status is 'Reviewed - Ready to Run EDBC'
2. Update the Medi-Cal EDBC rules to update the Non-MAGI Turning 65 Packet status to 'Complete - EDBC Accepted' when all the following are true:
  - a. EDBC is run with the Run Reason of 'RE'
  - b. Non-MAGI Turning 65 Packet submit month equals the EDBC benefit month
  - c. Latest Non-MAGI Turning 65 Packet status is 'Reviewed - Ready to Run EDBC'
3. Update the Auto-set RE logic to include the Non-MAGI Screening Packet in the list of valid MC RE Packets criteria during EDBC evaluation.
4. Update the Auto-set RE logic to run Medi-Cal with 'RE' EDBC Run Reason if 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.

## 2.5 Customer Reporting List

### 2.5.1 Overview

**C-IV only:** Update the Packet names; Non-MAGI Packet to Non-MAGI Screening Packet and Non-MAGI Screening Aged 65 Packet to Non-MAGI Turning 65 Packet.

**LRS only:** Update the Customer Reporting List page to include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet report types for default search results, view search results with no filters and the Display Type field.

## 2.5.2 Customer Reporting List

Search Results Summary				Results 1 - 10 of 10	
Display Type:		From:	To:	View	
Non-MAGI Screening Packet					
Type	Submit Month	Program	Status	Status Date	
<a href="#">MSP Packet</a>	06/2009	MC	Complete- EDBC Accepted	06/09/2009	Edit
<a href="#">MSP Packet</a>	06/2010	MC	Complete- EDBC Accepted	05/11/2010	Edit
<a href="#">MSP Packet</a>	06/2011	MC	Complete- EDBC Accepted	04/28/2011	Edit
<a href="#">MSP Packet</a>	06/2012	MC	Received	06/24/2019	Edit
<a href="#">MSP Packet</a>	08/2013	MC	Complete- EDBC Accepted	08/29/2013	Edit
<a href="#">MC RE Packet</a>	08/2014	MC	Complete- EDBC Accepted	07/10/2014	Edit
<a href="#">MC RE Packet</a>	08/2015	MC	Complete- EDBC Accepted	07/07/2015	Edit
<a href="#">MC RE Packet</a>	08/2016	MC	Not Applicable	06/24/2019	Edit
<a href="#">Non-MAGI Screening Packet</a>	12/2019	MC	Reviewed- Ready to Run EDBC	12/07/2019	Edit
<a href="#">Non-MAGI Turning 65 Packet</a>	12/2019	MC	Complete- EDBC Accepted	12/08/2019	Edit

This Type 1 page took 0.66 seconds to load.

Figure 2.5.2 – Customer Reporting List page (LRS)

## 2.5.3 Description of Changes

1. **C-IV only:** Update the Packet names, 'Non-MAGI Packet' to 'Non-MAGI Screening Packet' and 'Non-MAGI Screening Aged 65 Packet' to 'Non-MAGI Turning 65 Packet'.
2. **LRS only:** Update the default search and the search results when the View button is clicked with no Display Type to include Report Type 'Non-MAGI Screening Packet' and 'Non-MAGI Turning 65 Packet'. These Report Types will be added in the Display Type field.

## 2.5.4 Page Location

**Global:** Eligibility

**Local:** Reporting

**Task:** Customer Reporting

## 2.5.5 Security Updates

No updates.

## 2.6 Customer Reporting Detail

### 2.6.1 Overview

**C-IV:** Update the Packet names, 'Non-MAGI Packet' to 'Non-MAGI Screening Packet' and 'Non-MAGI Screening Aged 65 Packet' to 'Non-MAGI Turning 65 Packet'.

**LRS:** Update the Customer Reporting Detail page to include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet report types.

### 2.6.2 Customer Reporting Detail

**Customer Reporting Detail**

\*- Indicates required fields

Save and Return Cancel

Report Type: Non-MAGI Screening Packet      Submit Month: 08/2018      Date Received:

Personal Contact: No

Program	Status	Status Detail	Date
MC			

Medi-Cal Status History

Status	Status Date	Action Date	Updated By
Sent	06/21/2018	06/21/2018 23:02:23 PM	<a href="#">582878</a>
Generated	06/21/2018	06/21/2018 18:08:50 PM	<a href="#">620532</a>

Save and Return Cancel

This Type\_1 page took 0.38 seconds to load.

Figure 2.6.2 – Customer Reporting Detail page (LRS)

### 2.6.3 Description of Changes

1. **C-IV only:** Update the Packet names, 'Non-MAGI Packet' to 'Non-MAGI Screening Packet' and 'Non-MAGI Screening Aged 65 Packet' to 'Non-MAGI Turning 65 Packet'.
2. **LRS:** Update the Customer Reporting Detail page to include the Non-MAGI Screening Packet and the Non-MAGI Turning 65 Packet. When entering the Customer Reporting Detail page, the current Packet's Status will determine the available options for the Status field dropdown. **See Appendix 4.1** for associated Status values.

## 2.6.4 Page Location

**Global:** Eligibility

**Local:** Reporting

**Task:** Customer Reporting

## 2.6.5 Security Updates

No updates.

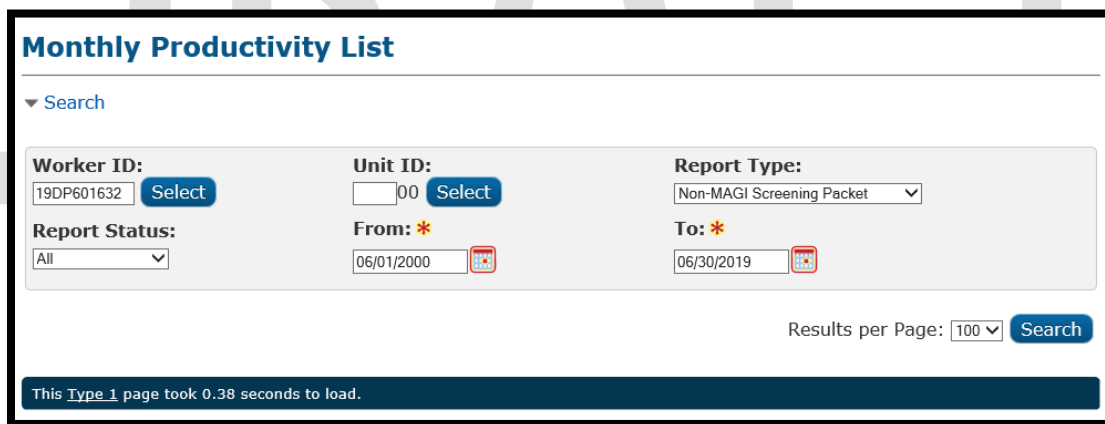
## 2.7 Monthly Productivity List

### 2.7.1 Overview

**C-IV:** Update the packet names, 'Non-MAGI Packet' to 'Non-MAGI Screening Packet' and 'Non-MAGI Screening Aged 65 Packet' to 'Non-MAGI Turning 65 Packet'.

**LRS:** Update the Monthly Productivity List page to search for the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet report types.

### 2.7.2 Monthly Productivity List



The screenshot shows the 'Monthly Productivity List' search interface. It features a search bar at the top, followed by a search dropdown. Below this is a search criteria form with three columns: Worker ID (text input with '19DP601632' and a 'Select' button), Unit ID (text input with '00' and a 'Select' button), and Report Type (dropdown menu with 'Non-MAGI Screening Packet' selected). The second row contains Report Status (dropdown with 'All'), From (date input with '06/01/2000' and a calendar icon), and To (date input with '06/30/2019' and a calendar icon). At the bottom right, there is a 'Results per Page' dropdown set to '100' and a 'Search' button. A status bar at the bottom indicates 'This Type\_1 page took 0.38 seconds to load.'

Figure 2.7.2 – Customer Reporting Detail page

### 2.7.3 Description of Changes

1. **C-IV only:** Update the packet names, 'Non-MAGI Packet' to 'Non-MAGI Screening Packet' and 'Non-MAGI Screening Aged 65 Packet' to 'Non-MAGI Turning 65 Packet'.
2. **LRS only:** Update the Monthly Productivity List page to search for the Report Types including the Non-MAGI Screening Packet and the Non-MAGI Turning 65 Packet in the Report Type field.

## 2.7.4 Page Location

**Global:** Eligibility

**Local:** Workload Inventory

**Task:** Monthly Productivity

## 2.7.5 Security Updates

No updates.

## 2.8 Tasks (LRS only)

### 2.8.1 Description of Changes

**Note:** There is existing logic in C-IV to create the task when Non-MAGI Screening Packet is received through Kiosk/C4Y/Scanned through Imaging.

1. Generate a task for the Program Assigned Worker when the Non-MAGI Screening Packet or the Non-MAGI Turning 6 Packet is scanned through Kofax or imaged through YBN.
2. Create Tasks as follows:
  - Non-MAGI Screening Packet Received

LRS Task Details	
<b>Trigger Condition</b>	When a Non-MAGI Screening Packet is received through the Image scanning process or when the packet is submitted through the YBN.
<b>Task Type</b>	CT 399 - Non-MAGI Screening Packet Received
<b>Task Category</b>	Screening Packet
<b>Task Priority</b>	CR
<b>Task Due Date</b>	3 days
<b>Task Expiration Date</b>	30 calendar days
<b>Task Long Description</b>	Non-MAGI Screening Packet Received
<b>Task Initial Assignment</b>	Program Assigned Worker
<b>Task Navigation Template</b>	N/A



- Non-MAGI Turning 65 Packet Received

LRS Task Details	
<b>Trigger Condition</b>	When a Non-MAGI Turning 65 Packet is received through the Image scanning process or when the packet is submitted through the YBN.
<b>Task Type</b>	CT 399 – Non-MAGI Turning 65 Packet Received
<b>Task Category</b>	Screening Packet
<b>Task Priority</b>	CR
<b>Task Due Date</b>	3 days
<b>Task Expiration Date</b>	30 calendar days
<b>Task Long Description</b>	Non-MAGI Turning 65 Packet Received
<b>Task Initial Assignment</b>	Program Assigned Worker
<b>Task Navigation Template</b>	N/A.

3. Add CODE\_DETL > Category CT329 for the new Non-MAGI Screening Packet and Non-MAGI Turning 65 packet.

- Non-MAGI Screening Packet

Customer Reporting Type Code	Description
New/Update	New
Category Id	329
Code Num Identif	'Implementation TBD'
Short Decode Name	Non-MAGI Screening Packet
Long Decode Name	Non-MAGI Screening Packet
Barcode Form Type Code (REFER_TABLE_3_DESCR)	'Implementation TBD'
EDMS Form Id (REFER_TABLE_5_DESCR)	<b>PR COVER LETTER</b>

- Non-MAGI Turning 65 Packet

Customer Reporting Type Code	Description
New/Update	New
Category Id	329
Code Num Identif	'Implementation TBD'
Short Decode Name	Non-MAGI Turning 65 packet
Long Decode Name	Non-MAGI Turning 65 packet
Barcode Form Type Code (REFER_TABLE_3_DESCR)	'Implementation TBD'
EDMS Form Id (REFER_TABLE_5_DESCR)	PR COVER LETTER

**Note:** The ITD will use the 'PR' Batch Class when calling the LRS webservice.

**Task Detail**

\* - Indicates required fields

Case Number: \*TEST

**View Images** **Save and Return** **Cancel**

**Type:** MC RD Packet Received  
**Category:** Redetermination  
**Status:** Assigned

**Created Date:** 05/07/2019  
**Worker Assigned: \*** 12345678  
**Assigned Date:** 05/07/2019

**Due Date: \*** 05/10/2019  
**Expiration Date:** 06/06/2019

**Long Description:**  
 MC RD Packet Received for MC

**Task History**

**View Images** **Save and Return** **Cancel**

This Type\_1 page took 0.12 seconds to load.

**Figure 2.8.1 – Task Detail page (LRS)**

**Note:** When the 'View Images' button is clicked, a popup window appears and shows the list of images associated to this task.

## 2.9 Reports (LRS only)

### 2.9.1 Overview

The Monthly Productivity List Export Report, Customer Reporting Progress Report, and Customer Reporting Progress Detail report will be updated to include the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet information. The Customer Reporting reports will also be updated to align with the Customer Reporting reports in the C-IV system.

### 2.9.2 Description of Changes

1. Update the Monthly Productivity List Export report to include the new 'Non-MAGI Screening Packet' and 'Non-MAGI Turning 65 Packet' packet type in the same manner as the Monthly Productivity List online page. This report is an export for the online page and the data must match.

Category ID	Code	Short Description
329	NM	Non-MAGI Screening Packet
329	65	Non-MAGI Turning 65 Packet

**Table 2.9.2.1 Code Detail Record for the Non-MAGI Screening Packet**

2. To reduce system differences on the Customer Reporting Progress Report, update the report as follows:

	Generated	Error	Sent	Received	Incomplete	Not Applicable	Reviewed-Ready To Run EDBC	Complete - EDBC Accepted
SAR 7 (CW)	4	0	3	1	0	1	0	0
SAR 7 (CF)	4	0	3	1	0	0	0	1
TMC 176 S	16	0	12	8	5	4	0	6
QR 7 (GA/GR)	5	0	3	3	0	3	0	2
CF RE Packet	1	0	1	1	0	0	1	0
CW/CF RE Packet	1	0	1	1	0	0	0	1
CW RE Packet	4	0	4	3	0	1	0	3
MC RE Packet	4	0	4	2	1	0	0	3
LTC MC RE Packet	5	0	4	2	1	0	0	3
ABD MC RE Packet	19	0	19	13	1	2	0	14
MC 604 IPS Packet	1	0	1	1	0	0	0	1
MAGI RE Packet	71	2	51	29	8	10	1	33
Non-MAGI Screening Packet	77	0	63	45	18	10	0	38
Mixed MC RE Packet	15	1	12	12	1	0	1	13
Non-MAGI Turning 65 Packet	2	0	1	1	0	0	0	2
Total	=SUM(C13:C25)	=SUM(D13:D25)	=SUM(E13:E25)	=SUM(F13:F25)	=SUM(G13:G25)	=SUM(H13:H25)	=SUM(I13:I25)	=SUM(J13:J25)
Overall % Completed	84							

**Figure 2.9.2.2 – Customer Reporting Progress Report – Summary Sheet Mockup**

- a. Update the report to include all the following customer report statuses in the Summary sheet (Sheet1) and detail sheets (Sheet2 thru Sheet6). The 'Complete' customer reporting status on the report will be renamed to 'Complete - EDBC Accepted'.

Category ID	Code	Short Description
258	GE	Generated
258	ER	Error
258	SE	Sent
258	RE	Received
258	IN	Incomplete
258	NA	Not Applicable
258	RR	Reviewed- Ready to Run EDBC
258	CE	Complete- EDBC Accepted

**Table 2.9.2.2a Customer Reporting Status**

- b. Rename the 'Medi-Cal RE Packets' sheet header to 'Medi-Cal Packets' on the Medi-Cal Packets sheet (Sheet6).
- c. Update the Summary sheet (Sheet1) to include the following new lines titled 'MAGI RE Packet', 'Non-MAGI Screening Packet' and 'Non-MAGI Turning 65 Packet' that provide summary counts for Generated, Error, Sent, Received, Incomplete, Not Applicable, Reviewed- Ready to Run EDBC and Completed- EDBC Accepted packets.
- d. Update the Summary sheet (Sheet1) to include a new line titled 'Total'. This row will be the dynamic sum of all customer reporting types by status.
- e. Update the detail sheets (Sheet2 thru Sheet6) to include static total and a dynamic total placed above the column headers. The totals will be a summation of all customer reports on the sheet by status.
- f. Update the 'Medi-Cal Packets' detail sheet (Sheet6) to include 'MAGI RE Packet', 'Non-MAGI Screening Packet' and 'Non-MAGI Turning 65 Packet' information for the following statuses: Generated, Error, Sent, Received, Incomplete, Not Applicable, Reviewed- Ready to Run EDBC and Completed- EDBC Accepted. The counts will be grouped by Customer Reporting Type and assigned Worker Id.
- g. Remove all report references and logic pertaining to the MC 176 S.
- h. Update the report parameter page to additionally display the following two months from the current month in the Submit Month field. For example, if the currently month is April the Submit Month drop down will display the May and June month. This change does not include any page validation to prevent further future months from being selected.

Figure 2.9.2.2h – Parameter Page Mockup

- i. The data on the Customer Reporting Progress Report will be refreshed every batch night.
- j. Restrict the data on the Customer Reporting Progress Report to 48 months of historical data. This will be based on the customer report's effective month.
- k. Update the report so that the customer report names on the Summary sheet (Sheet1) hyperlink to their associated detail sheet instead of each individual numeric count.  
For example, in the Summary sheet (Sheet1) if the user wants to view MAGI RE Packet information in the Medi-Cal Packets detail sheet (Sheet6), they will click on the MAGI RE Packet label rather than the individual counts for the several Medi-Cal Packet Customer Reporting statuses.
- l. In the Summary Sheet (Sheet1) update the Overall % Completed field to calculate the percentage as follows:  
**Numerator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' plus the count of Customer Reports on the report with the latest status of 'Not Applicable'.  
**Denominator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus the count of any other Customer Report on the report with a received date.
- m. In the SAR 7 detail sheet (Sheet 2) update the worker specific % of CW Reports Completed metric to calculate the percentage as follows:  
**Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the SAR 7s for the CalWORKs program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.  
**Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the SAR 7s for the CalWORKs program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.
- n. In the SAR 7 detail sheet (Sheet 2) update the worker specific % of CF Reports Completed metric to calculate the percentage as follows:  
**Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the SAR 7s for the CalFresh program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.  
**Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the SAR 7s for the CalFresh program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.

- o. In the CalWORKs / CalFresh RE Packets detail sheet (Sheet 4) update the worker specific % of CW Reports Completed metric to calculate the percentage as follows:  
**Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the given packet types for the CalWORKs program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.  
**Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the given packet types for the CalWORKs program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.
- p. In the CalWORKs / CalFresh RE Packets detail sheet (Sheet 4) update the worker specific % of CF Reports Completed metric to calculate the percentage as follows:  
**Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the given packet types for the CalFresh program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.  
**Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the given packet types for the CalFresh program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.
- q. In the TMC 176 S and the Medi-Cal Packets detail sheets (Sheet 3 and Sheet 5) update the worker specific % of Reports Completed metric to calculate the percentage as follows:  
**Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the given packet types that are assigned to the given worker with the latest status of 'Complete - EDBC Accepted' or 'Not Applicable'.  
**Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the given packet types that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.
- r. Update the report description as displayed on the Report Search page to: "Provides the number of SAR 7, TMC 176 S, QR 7 and RE Packets by status for a specified benefit month and organization".
- s. Replace the 'Date' header with 'Submit Month'. The 'Submit Month' will be equal to the Submit Month parameter used to generate the report. The date shall be formatted as 'MM/YYYY'.

- t. Add an 'As of Date' header which will display the date the report data was last successfully refreshed. The date shall be formatted as 'MM/DD/YYYY'.

Please refer to attached document Customer Reporting Report\_rtf Mockup.xlsx for the report layout.

- 3. To reduce system differences on the Customer Reporting Progress Detail Report, update the report as follows:

	Distinct Generated	Distinct Error	Distinct Sent	Distinct Received	Distinct Incomplete	Distinct Not Applicable	Distinct Reviewed - Ready to Run EDBC	Distinct Complete - EDDBC Accepted
SAR 7 (CW)	3	0	3	2	0	2	0	0
SAR 7 (CF)	3	0	3	2	0	0	0	2
TMC 176 S	0	0	0	0	0	0	0	0
QR 7 (GA/GR)	0	0	0	0	0	0	0	0
CF RE Packet	5	0	5	2	0	0	0	2
CW/CF RE Packet	0	0	0	0	0	0	0	0
CW RE Packet	0	0	0	0	0	0	0	0
MC RE Packet	0	0	0	0	0	0	0	0
LTC MC RE Packet	0	0	0	0	0	0	0	0
ABD MC RE Packet	1	0	1	0	0	0	0	0
MC 604 IPS Packet	0	0	0	0	0	0	0	0
MAGI RE Packet	0	0	0	0	0	0	0	0
Non-MAGI Screening Packet	0	0	0	0	0	0	0	0
Mixed MC RE Packet	0	0	0	0	0	0	0	0
Non-MAGI Turning 65 Packet	1	0	1	0	0	0	0	0
<b>Total</b>	=SUM(C16:C29)	=SUM(D16:D29)	UM(E16:E29)	JM(F16:F29)	UM(G16:G29)	=SUM(H16:H29)	=SUM(I16:I29)	=SUM(J16:J29)
<b>Overall % Completed</b>	100.00							

**Figure 2.9.2.3 – Customer Reporting Progress Detail Report – Summary Sheet Mockup**

- a. Update the report to include all the following customer report statuses in the Summary sheet (Sheet1) and detail sheets (Sheet2 and Sheet3). The 'Complete' customer reporting status will be renamed to 'Complete – EDDBC Accepted'.

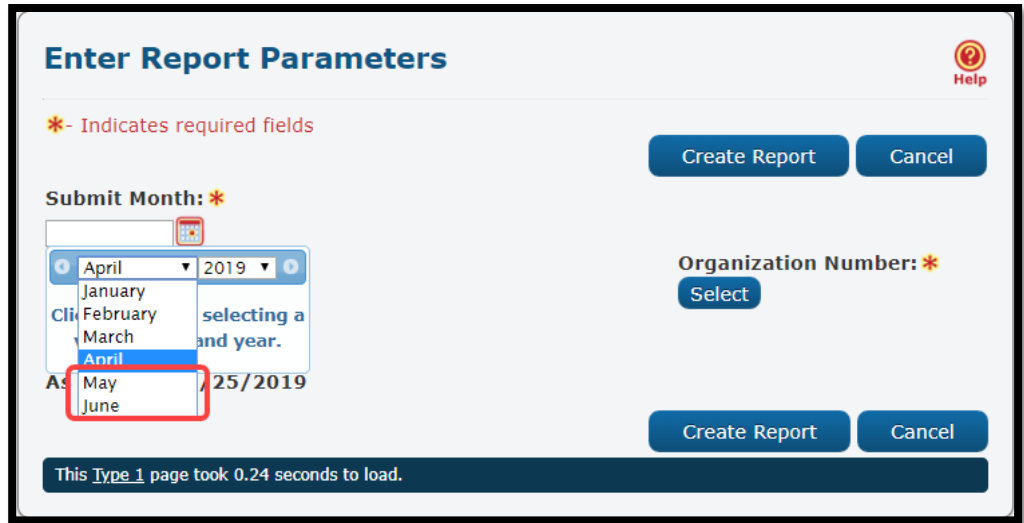
Category ID	Code	Short Description
258	GE	Generated
258	ER	Error
258	SE	Sent
258	RE	Received
258	IN	Incomplete



258	NA	Not Applicable
258	RR	Reviewed- Ready to Run EDBC
258	CE	Complete- EDBC Accepted

**Table 2.9.2.3a Customer Reporting Status**

- b. Rename the 'RE Packets' sheet header to 'Packets' on the newly named Packets sheet (Sheet3).
- c. Update the Summary sheet (Sheet1) to include new lines titled 'MAGI RE Packet', 'Non-MAGI Screening Packet' and 'Non-MAGI Turning 65 Packet' that provide summary counts for Generated, Error, Sent, Received, Incomplete, Not Applicable, Reviewed- Ready to Run EDBC and Completed- EDBC Accepted packets.
- d. Update the Summary sheet (Sheet1) to include a new line titled 'Total'. This row will be the dynamic sum of all customer reporting types by status.
- e. Update the detail sheets (Sheet2 and Sheet3) to add a total line for each new status. The non-distinct totals will also be turned into a dynamic total count.
- f. Update the 'Packets' detail sheet (Sheet2 and Sheet3) to include 'MAGI RE Packet', 'Non-MAGI Screening Packet' and 'Non-MAGI Turning 65 Packet' information for the following statuses: Generated, Error, Sent, Received, Incomplete, Not Applicable, Reviewed- Ready to Run EDBC and Completed- EDBC Accepted. The counts will be grouped by Customer Reporting Type and assigned Worker Id.
- g. Remove all report references and logic pertaining to the MC 176 S.
- h. Update the report parameter page to additionally display the following two months from the current month in the Submit Month field. For example, if the currently month is April the Submit Month drop down will display the May and June month. This change does not include any page validation to prevent further future months from being selected.



**Figure 5.1.5-4 – Parameter Page Mockup**

- i. The data on the Customer Reporting Progress Detail Report will be refreshed every batch night.
- j. Restrict the data on the Customer Reporting Progress Detail Report to 48 months of historical data. This will be based on the customer report's effective month.
- k. Update the report so that the customer report names on the Summary sheet (Sheet1) hyperlink to their associated detail sheet (Sheet2 and Sheet3) instead of each individual numeric count. For example, in the Summary sheet (Sheet1) if the user wants to view MAGI RE Packet information in the Packets detail sheet (Sheet3), they will click on the MAGI RE Packet label rather than the individual counts for the several Medi-Cal Packet Customer Reporting statuses.
- l. In the Summary Sheet (Sheet1) update the Overall % Completed field to calculate the percentage as follows:
 

**Numerator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' plus the count of Customer Reports on the report with the latest status of 'Not Applicable'.

**Denominator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus the count of any other Customer Report on the report with a received date.
- m. In the detail sheets (Sheet2 and Sheet3) update the % Completed field to calculate the percentage as follows:
 

**Numerator:** All Customer Reports on the given detail sheet (Sheet2 or Sheet3) with a latest status of 'Complete – EDBC Accepted' plus all Customer Reports on the given detail sheet (Sheet2 or Sheet3) with the latest status of 'Not Applicable'.

**Denominator:** All Customer Reports on the given detail sheet (Sheet2 or Sheet3) with a final status of 'Complete – EDBC Accepted' or 'Not Applicable' that was included in the numerator plus any other Customer Report on the given detail sheet (Sheet2 or Sheet3) with a received date.

- n. Update the report description to the following: "Provides detailed information of SAR 7, TMC 176 S, QR 7 and RE Packets by status for a specified benefit month and organization".
- o. Replace the 'Date' header with 'Submit Month'. The 'Submit Month' will be equal to the Submit Month parameter used to generate the report. The date shall be formatted as 'MM/YYYY'.
- p. Add an 'As of Date' header which will display the date the report data was last successfully refreshed. The date shall be formatted as 'MM/DD/YYYY'.

Please refer to attached document Customer Reporting Detail Report\_rtf Mockup.xlsx for the report layout.

## 2.10 Reports (C-IV Only)

### 2.10.1 Overview

The Non-MAGI Turning 65 Packet has been renamed from Non-MAGI Screening Aged 65 Packet. The Non-MAGI Packet has also been renamed to Non-MAGI Screening Packet. The customer reporting reports in the C-IV system need to be updated to reference to the new names. The 'Overall % Complete' and '% of Reports Completed' will also be updated to fix an issue where Customer Reports in 'Not Applicable' status are causing the percentage to be inflated.

### 2.10.2 Description of Changes

1. Update the Customer Reporting Progress Report as follows:
  - a. Update the Summary Sheet (Sheet1) to rename any reference to the Non-MAGI Screening Aged 65 Packet to Non-MAGI Turning 65 Packet.
  - b. Update the Summary Sheet (Sheet1) to rename any reference to the Non-MAGI Packet to Non-MAGI Screening Packet.
  - c. In the Summary Sheet (Sheet1) update the Overall % Completed field to calculate the percentage as follows:

**Numerator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' plus the count of Customer Reports on the report with the latest status of 'Not Applicable'.

**Denominator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus the count of any other Customer Report on the report with a received date.

- d. In the SAR 7 detail sheet (Sheet 2) update the worker specific % of CW Reports Completed metric to calculate the percentage as follows:
- Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the SAR 7s for the CalWORKs program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.
- Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the SAR 7s for the CalWORKs program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.
- e. In the SAR 7 detail sheet (Sheet 2) update the worker specific % of CF Reports Completed metric to calculate the percentage as follows:
- Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the SAR 7s for the CalFresh program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.
- Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the SAR 7s for the CalFresh program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.
- f. In the CalWORKs / CalFresh RE Packets detail sheet (Sheet 4) update the worker specific % of CW Reports Completed metric to calculate the percentage as follows:
- Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the given packet types for the CalWORKs program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.
- Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the given packet types for the CalWORKs program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.
- g. In the CalWORKs / CalFresh RE Packets detail sheet (Sheet 4) update the worker specific % of CF Reports Completed metric to calculate the percentage as follows:
- Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the given packet types for the CalFresh program that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.

**Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the given packet types for the CalFresh program that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.

- h. In the TMC 176 S and the Medi-Cal Packets detail sheets (Sheet3 and Sheet 5) update the worker specific % of Reports Completed metric to calculate the percentage as follows:

**Numerator:** For the given effective month, packet type and worker number, the numerator is the count of all the given packet types that are assigned to the given worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable'.

**Denominator:** For the given effective month, packet type and worker number the denominator is the count of all the given packet types that are assigned to the worker with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus any other Customer Report assigned to the worker for the given effective month and packet type that has a received date.

- 2. Update the Customer Reporting Progress Detail Report as follows:
  - a. Update the Summary Sheet (Sheet1) to rename any reference to the Non-MAGI Screening Aged 65 Packet to Non-MAGI Turning 65 Packet.
  - b. Update the Summary Sheet (Sheet1) to rename any reference to the Non-MAGI Packet to Non-MAGI Screening Packet.
  - c. In the Summary Sheet (Sheet1) update the Overall % Completed field to calculate the percentage as follows:

**Numerator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' plus the count of Customer Reports on the report with the latest status of 'Not Applicable'.





















**Denominator:** The count of all Customer Reports on the report with the latest status of 'Complete – EDBC Accepted' or 'Not Applicable' plus the count of any other Customer Report on the report with a received date.











- d. In the detail sheets (Sheet2 and Sheet3) update the % Completed field to calculate the percentage as follows:

**Numerator:** All Customer Reports on the given detail sheet (Sheet2 or Sheet3) with a latest status of 'Complete – EDBC Accepted' plus all Customer Reports on the given detail sheet (Sheet2 or Sheet3) with the latest status of 'Not Applicable'.

**Denominator:** All Customer Reports on the given detail sheet (Sheet2 or Sheet3) with a final status of 'Complete – EDBC Accepted' or 'Not Applicable' that was included in the numerator plus any other Customer Report on the given detail sheet (Sheet2 or Sheet3) with a received date.

### 3 SUPPORTING DOCUMENTS

1	Reports	Customer Reporting Progress Report Mockup	 Customer Reporting Progress
2	Reports	Customer Reporting Progress Detail Report Mockup	 Customer Reporting Progress
3	Correspondence	Non-MAGI Screening Packet Cover Letter - LRS	  Non-MAGI Screening Cover lett Non-MAGI Screening Cover lett
4	Correspondence	Non-MAGI Turning 65 Packet Coversheet - LRS	  Non-MAGI Turning 65 Cover letter_SP - Non-MAGI Turning 65 Cover letter - LRS
5	Correspondence	Non-MAGI Informing Letter (05/14)	  CIV Non-MAGI Informing Letter EN. LRS Non-MAGI Informing Letter EN.   CIV Non-MAGI Informing Letter SP. LRS Non-MAGI Informing Letter SP.
6	Correspondence	Existing - MC 604 IPS	  MC 604 IPS SP CIV.pdf MC604IPS_SP LRS.pdf   MC 604 IPS EN LRS.pdf MC 604 IPS EN CIV.pdf
7	Correspondence	MC 007	  MC 007 English.pdf MC 007 Spanish.pdf
8	Correspondence	PUB 10	  PUB10_SP_LRS.pdf PUB10_EN_LRS.pdf   PUB10_SP_CIV.pdf PUB10_CIV_EN.pdf

9	Correspondence	DHCS 7077	 DHCS 7077 EN 12 18.pdf  DHCS 7077 SP 12 18.pdf
10	Correspondence	DHCS 7077A	 DHCS7077A_EN_SP_DHCS7077A_CIV.pdf  DHCS7077A_CIV.pdf
11	Correspondence	APTC/CSR Brochure	 APTC_CSR_Brochure_SP.pdf  APTC_CSR_Brochure.pdf
12	Correspondence	Non-MAGI Screening Packet Coversheet - C-IV	 Non-MAGI Screening Packet Co
13	Correspondence	Non-MAGI Turning 65 Packet Coversheet - C-IV	 Non-MAGI Turning 65 Packet Coversheet
14	Correspondence	FDD for Non-MAGI Screening Packet	 FD_FRM_NonMAGI ScreeningPacket.doc
15	Correspondence	Updated FDD for Non-MAGI Turning 65 Packet	 FD_FRM_Turning65.docx

## 4 APPENDIX

### 4.1 Status field value Mapping

Current Status	Available Status(es) in dropdown	Status Detail
Sent	<blank value>	<no selection>
	Not Applicable	
	Received	<blank value>
		Action Required
Not Applicable	<no value>	<no selection>
Incomplete	<blank value>	<no selection>
	Not Applicable	
	Reviewed- Ready to Run EDBC	
Received	<blank value>	<no selection>
	Incomplete	
	Not Applicable	
	Reviewed- Ready to Run EDBC	
Reviewed- Ready to Run EDBC	<blank value>	<no selection>
	Not Applicable	
	Received	<blank value>
		Action Required
Complete- EDBC Accepted	<no value>	<no selection>

**Note:** In Edit mode, <no value> will display drop down with no selectable value, <blank value> will allow no value to be selected, and <no selection> will not show the drop down.