




## **Design Document**

CA-208241 | CIV-104022

CalHEERS eHIT: One-Time Batches to Transition  
Young Adults from Restricted Scope  
to Full Scope Medi-Cal

Version 1.0

DOCUMENT APPROVAL HISTORY		
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# 1 OVERVIEW

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This SCR will automate the transition of young adults 19-25 years of age, inclusive, currently in restricted scope Medi-Cal to full scope Medi-Cal with a one-time batch process.

## 1.1 Current Design

In Release 19.09, CalHEERS and The System were updated to grant full scope Medi-Cal for young adults who are 19 to 25 years of age, inclusive, regardless of satisfactory citizenship or immigration status if they meet all other eligibility criteria effective January 2020 benefit month starting 11/20/2019 with SCRs CA-206941, CIV-103874 and CalHEERS Change Request CH-139211. This population is referred to as “Young Adult Expansion.”

The System has individuals age 19-25, inclusive, still receiving restricted scope Medi-Cal who should be transitioned to full scope Medi-Cal.

C-IV Batch EDBC process skips cases if the Determination of Eligibility Response (DER) to be used in Medi-Cal EDBC has an individual in Soft Pause; LRS does not have this functionality.

LRS Batch EDBC functionality allows Batch EDBC to automatically add a standard Journal entry to cases processed by Batch EDBC with:

**Journal Category:** Eligibility

**Journal Type:** Batch EDBC

**Short Description:** Batch EDBC ran for [MONTH/YEAR].

**Long Description:** Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: <Batch EDBC Sub-Type Code Short Description>

There is no Batch EDBC Sub-Type Code for Young Adult Expansion one-time transition batch processing, so LRS will automatically create the journal entry with a missing reason in the Long Description. C-IV does not have the functionality to automatically add a standard Journal Entry.

## 1.2 Requests

Automate the transition of young adults age 19- 25, inclusive, currently receiving restricted scope Medi-Cal to full scope Medi-Cal based on the Transition Aid Code Crosswalk provided by DHCS.

**For LRS only:** Add a Batch EDBC Sub-Type Code so the auto-journal Long Description will display the reason: “Young Adult Expansion one-time transition batch”.

**For C-IV only:** Create a Journal entry for the cases processed successfully through Batch EDBC.

Provide one-time County lists for County Eligibility Workers to follow-up on any individuals who remain in restricted scope Medi-Cal or who are Discontinued from Medi-Cal after the one-time transition batch processing is complete.

### 1.3 Overview of Recommendations

Initiate a one-time process to send Eligibility Determination Requests (EDRs) to CalHEERS and run Batch EDBC for identified individuals 19 to 25 years of age, inclusive, who are receiving restricted scope Medi-Cal to transition to full scope Medi-Cal and provide lists to the County for follow-up of the rest.

**For LRS only:** Add a Batch EDBC Sub-Type Code to display the Journal Long Description reason: "Young Adult Expansion one-time transition batch".

**For C-IV only:** Create a Journal entry for the cases processed successfully in the one-time process.

### 1.4 Assumptions

1. This one-time batch process may include Medi-Cal programs with an overdue RE or an in-process RE.

LRS current functionality automatically sets EDBC Run Reason to 'RE' when all the following are true:

- a. The EDBC benefit month is equal to next RE period begin date and there is a valid open RE record for the Medi-Cal program
- or –
- The EDBC benefit month is equal to the come-up month.
- b. The appropriate RE packet was generated for the RE Due Month for the program.
- c. The latest RE packet status is 'Reviewed-Ready to Run EDBC'

For LRS only, this means if a Medi-Cal program is processed in the one-time batch process and meets the LRS current criteria for automatically setting the EDBC Run Reason to 'RE', the Medi-Cal program will process as a Renewal.

C-IV does not have this functionality so the C-IV EDBC will be processed as a 'Regular' EDBC.

2. While the description of Young Adult Expansion mentions to move individuals aged 19-25, inclusive, from restricted scope to full scope, per the "Transition Aid Code Crosswalk" provided by DHCS, limited scope MAGI Medi-Cal aid codes are also included in the transition population. Limited scope MAGI Medi-Cal aid code M8 shows that the individual should be transitioned to full scope MAGI Medi-Cal aid code M7. Similarly, limited scope MAGI Medi-Cal aid code M0 shows that the individual should be transitioned to limited scope MAGI Medi-Cal aid code M9.

DHCS confirmed limited scope MAGI Medi-Cal is included in the Young Adult Expansion to full scope and that limited scope MAGI Medi-Cal aid code M9 is the expected final result after transitioning the Young Adult Expansion population who were previously eligible to limited scope MAGI Medi-Cal aid code M0. See "Clarification from DHCS for limited scope MAGI Medi-Cal transition" in Supporting Documents.

This one-time batch will include transitioning the young adult expansion population currently in restricted scope Medi-Cal and limited scope MAGI Medi-Cal aid codes M8, M0.

3. This one-time batch will not transition individuals in an inmate Medi-Cal aid code, but they will be included in List 3 "Individual age 19-25 on Restricted Scope Medi-Cal" for county worker follow-up.
4. **LRS only:** Child Welfare Medi-Cal programs will be identified through the worker associated to the program. The workers for Child Welfare Programs are associated to positions that have unit department type of "DCFS". These workers can be identified by the prefix of "19DC" in their worker ID numbers.

## 2 RECOMMENDATIONS

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### 2.1 One-time Batch

#### 2.1.1 Overview

Initiate a one-time process to send EDRs to CalHEERS and run Batch EDBC for identified individuals 19 to 25 years of age, inclusive, who are receiving restricted scope Medi-Cal to be transitioned to full scope Medi-Cal. Create a Journal entry for the cases processed successfully in the one-time process.

#### 2.1.2 Description of Changes

1. Batch MAGI
  - I. Identify Medi-Cal programs that meet all the following conditions for one-time Batch MAGI processing:
    - a. The Medi-Cal program contains an individual that meets all of the following conditions:
      - i. The individual's 19<sup>th</sup> birthday is on or before 01/01/2020.
      - ii. The individual's 26<sup>th</sup> birthday is on or after 01/02/2020.
      - iii. The individual is currently receiving any of the following aid codes during the January 2020 benefit month:
        - a restricted scope Medi-Cal aid code
        - limited scope MAGI Medi-Cal Aid Code M8
        - limited scope MAGI Medi-Cal Aid Code M0
    - b. The program contains at least one MAGI Medi-Cal eligible individual.
    - c. The CEW has not already processed MAGI and a corresponding Medi-Cal EDBC for January 2020 benefit month since the start date of the Young Adult Expansion rules update in SCR CA-206941/CIV-103662. (The start date is currently 11/20/2019 – subject to change by DHCS.)
    - d. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or manual EDBC.
    - e. **LRS only:** The program is not assigned to a Child Welfare Program Worker.
  - II. Send the EDR with "Continuing" (CO) EDR Run Reason code for benefit month January 2020.

## 2. Batch EDBC

### A. MAGI Medi-Cal and mixed MAGI/Non-MAGI

- I. Identify MAGI Medi-Cal and mixed MAGI/Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
  - a. The DER is received from Recommendation 1 and all the following conditions are true:
    - i. There are no 'Pending Eligible' MAGI Medi-Cal individuals on the DER.
    - ii. No individual became eligible for MAGI Medi-Cal who was previously not in receipt of MAGI Medi-Cal.
    - iii. No individual became discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
    - iv. There are no individuals on Soft Pause on the DER.
  - b. Medi-Cal EDBC has not been processed against the DER from Recommendation 1 or any subsequent DER for the January 2020 benefit month.
  - c. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or manual EDBC.
  - d. **LRS only:** The program is not assigned to a Child Welfare Program Worker.
- II. Run Batch EDBC for January 2020 benefit month for the Medi-Cal program in Targeted Program mode with Type Code "Batch Eligibility" (BE).
  - a. **LRS Only:** Include the new Batch EDBC Sub-Type Code added in Recommendation 2.1.2.3. 1.



## B. Non-MAGI Medi-Cal

- I. Identify Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
  - a. The program does not contain a MAGI Medi-Cal eligible individual.
  - b. The program contains an individual where all of the following are true:
    - i. The individual's 19<sup>th</sup> birthday is on or before 01/01/2020.
    - ii. The individual's 26<sup>th</sup> birthday is on or after 01/02/2020.
    - iii. The individual is currently receiving a restricted scope Non-MAGI Medi-Cal aid code **other than CMSP and Minor Consent Medi-Cal aid codes** during the January 2020 benefit month.
  - c. Medi-Cal EDBC has not been processed for January 2020 benefit month since the start date of the Young Adult Expansion rules update in SCR CA-206941/CIV-103662. (The start date is currently 11/20/2019 – subject to change by DHCS.)
  - d. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or Manual EDBC.
  - e. **LRS only:** The program is not assigned to a Child Welfare Program Worker.
- II. Run Batch EDBC for January 2020 benefit month only for the Medi-Cal program in Targeted Program mode with Type Code 'BE' (Batch Eligibility).
  - a. **LRS Only:** Include the new Batch EDBC Sub-Type Code added in Recommendation 2.1.2.3. I.

3. Journal Entry

- I. **LRS only:** Add Batch EDBC Sub-Type Code (CT\_942) for “Young Adult Expansion one-time transition batch” to the code table.

Code Table	Description
<b>New/Update</b>	New
<b>Category Id</b>	942
<b>Short Description</b>	Young Adult Expansion one-time transition batch
<b>Long Description</b>	Young Adult Expansion one-time transition batch

This will allow LRS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.

**Journal Category:** Eligibility

**Journal Type:** Batch EDBC

**Short Description:** Batch EDBC ran for 01/2020.

**Long Description:** Batch EDBC ran for 01/2020. Batch EDBC processed for the Medi-Cal program for the following reason: Young Adult Expansion one-time transition batch.

- II. **C-IV only:** Insert a Journal entry for each case processed successfully through Batch EDBC from Recommendation 2 with the following information:

**Journal Category:** Eligibility

**Journal Type:** Batch EDBC

**Short Description:** Batch EDBC ran for 01/2020.

**Long Description:** Batch EDBC ran for 01/2020. Batch EDBC processed for the Medi-Cal program for the following reason: Young Adult Expansion one-time transition batch.

### 2.1.3 Execution Frequency

This is a one-time change.

### 2.1.4 Key Scheduling Dependencies

- Friday 11/22/2019  
Batch operations team will run the Data Change Request (DCR) for Recommendation 1 before regularly scheduled batch processing on Friday, 11/22/2019. Then Friday's regularly scheduled batch will send the EDRs during Batch MAGI.
- Saturday 11/23/2019  
Batch operations will run the DCR for Recommendation 2 before regularly scheduled batch processing on Saturday, 11/23/2019. Then Saturday's regularly scheduled batch will process the cases through Batch EDBC.
- The C-IV journal entry DCR will run after Batch EDBC completes and before the C-IV application is up on Monday, 11/25/2019.

### 2.1.5 Counties Impacted

All 40 counties.

### 2.1.6 Data Volume/Performance




Batch MAGI will run approximately below mentioned Medi-Cal programs for the month of January 2020.

BENEFIT MONTH	C-IV	LRS
<b>January 2020</b>	13,721	23,230

Batch EDBC will run approximately below mentioned Medi-Cal EDBC's for the month of January 2020. At least one Notice of Action is expected for each of the cases processed in Batch EDBC.

BENEFIT MONTH	C-IV	LRS
<b>January 2020</b>	14,365	23,845

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	Transition Aid Code Crosswalk	 Transition Crosswalk Final Vers
2	Eligibility	Manual Clean up Aid Code Crosswalk	 Manual Clean up Crosswalks Final Ver
3	Eligibility	Clarification from DHCS for limited scope MAGI Medi-Cal transition	 <b>RE Young Adult Expansion Aid code</b>

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## 4 OUTREACH

Generate one-time County lists to aid the counties to complete the transition of young adults to full scope Medi-Cal after Batch EDBC completes.

The lists will display the standard columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker
- Benefit Month

Lists will be posted at following locations:

System	Path
LRS	CalACES Web Portal>System Changes>SCR and SIR Lists>2019>CA-208241
C-IV	CalACES Web Portal>System Changes>SCR and SIR Lists>2019>CIV-104022

1. **List Name:** Medi-Cal Program Discontinued  
Generate a list of cases where the Medi-Cal program was discontinued due to the one-time Batch EDBC processing for Young Adult Expansion transition to full scope.

**Additional Column:** None

**County Action:** These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.

2. **List Name:** Medi-Cal Individual Discontinued

Generate a list of cases where an individual was discontinued from the Medi-Cal program due to the one-time Batch EDBC processing for Young Adult Expansion transition to full scope.

**Additional Columns:**

- CIN
- **Prior Aid Code – Display the aid code the individual was on prior to the discontinuance**
- **DOB**

**County Action:** These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close individuals, review these cases to verify the closure was accurate.

3. **List Name:** Individual age 19-25 on Restricted Scope Medi-Cal

Generate a list of cases that meets the following criteria:

- At least one individual whose 19<sup>th</sup> birthday is on or before 01/01/2020 and 26<sup>th</sup> birthday is on or after 01/02/2020 is still in restricted scope Medi-Cal or in limited scope aid codes M8, M0 or N7 (limited scope inmate aid code) **other than CMSP and Minor Consent Medi-Cal aid codes** effective January 2020 benefit month.

Include a column to indicate the reason(s) the Young Adult Expansion transition one-time batch processing did not move the individual to full scope.

**Known reasons:**

- **Became MAGI Elig on DER:** As a result of Batch MAGI, an individual became eligible for MAGI Medi-Cal who was previously not in receipt of MAGI Medi-Cal.
- **MAGI Disc or Inelig on DER:** As a result of Batch MAGI, an individual became discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
- **MAGI Pending on DER:** EDBC did not process because an individual is Pending Eligible on MAGI Determination.
- **Soft Pause:** EDBC did not process because there is an individual on the DER in Soft Pause.
- **Read-Only EDBC:** EDBC processed, but it was Read-Only.
- **In Process DER for Jan 2020:** Batch MAGI or Batch EDBC did not process because there is an 'In Process' Determination Change for January 2020.
- **Overridden, Read-only or Manual EDBC:** The Medi-Cal program was not processed by Batch MAGI nor Batch EDBC because the EDBC effective for January 2020 is an overridden, read-only or manual EDBC.
- **DER returned after Batch EDBC:** EDBC did not process because the DER from Batch MAGI did not return prior to running Batch EDBC; however, the DER did return prior to generating this list.

- **Child Welfare Program Worker:** The Medi-Cal Program is assigned to a Child Welfare Program Worker (LRS only).

**Additional Columns:**

- CIN
- Reason – Display all of the 'known reasons' that apply to the individual, leave blank if none apply.
- Aid Code – Display the individual's primary aid code effective 01/01/2020
- DOB

**County Action:** For cases where EDBC did not process as a result of being excluded from Batch EDBC, review the list and the Known Reason(s) to determine why the case did not process. Not all reasons will display so the worker will have to review the case for any other action necessary.

For cases that did process, review the case for the individual age 19-25, coming back on the DER as Soft Paused to keep them on the Restricted or Limited aid code. Follow process to remove the Soft Pause and re-run case to determine correct benefits. For cases that were returned a Read-Only EDBC, review the EDBC to determine the reason and take action to have a Regular EDBC returned to determine correct benefits for the customer.

Note: Some cases may have a blank reason column if an individual age 19-25, remains on restricted scope for any reason other than what is listed above. Some cases may have multiple reasons in the column.

## 5 REQUIREMENTS

### 5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant s/participant s eligibility for a program or programs.	The System will update Medi-Cal EDBC rules to grant full scope Non-MAGI Medi-Cal for all eligible young adults who are 19 to 25 years of age, inclusive, regardless of their citizenship or immigration status if they met all other eligible criteria.

## 6 APPENDIX

### 6.1 'The System' Definition

'The System' refers to both LRS and C-IV systems.

For instance, if the document mentions the below:

- Update The System to...

That implies:

- Both LRS and C-IV Systems will be updated with the same changes.

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