




## **Design Document**

CA-58123 | CIV-10791 – Add Validation to Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual

	DOCUMENT APPROVAL HISTORY	
	Prepared By	Renee Gustafson, Howard Suksanti, Rajan Vadapalli
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/2/2018	0.1	Original draft	Renee Gustafson
1/9/2019	0.2	Updated on Batch requirement.	Howard Suksanti
3/4/2019	0.3	Updated EDBC validations, new EDBC Run Reason, eHIT changes	Rajan Vadapalli
8/1/2019	0.4	Added MAGI Emulator changes, updated C-IV to have auto-set of EDBC Run Reason, added appendix with CalHEERS criteria for Soft Pause, clarified eHIT changes	Renee Gustafson
8/8/2019	0.5	Added CalSAWS Journal for Non-MAGI Screening packet generated by batch.	Renee Gustafson
8/22/2019	0.6	Added Manual EDBC page updates	Rajan Vadapalli

## Contents

1	Overview .....	5
1.1	Current Design.....	5
1.2	Requests .....	7
1.3	Overview of Recommendations .....	7
1.4	Assumptions .....	8
2	Recommendations .....	9
2.1	Run EDBC page .....	9
2.1.1	Overview.....	9
2.1.2	Run EDBC Page Mockup.....	9
2.1.3	Description of Changes .....	10
2.1.4	Page Location .....	10
2.2	Negative Action Detail page .....	10
2.2.1	Overview.....	10
2.2.2	Negative Action Detail Page Mockup.....	10
2.2.3	Description of Changes .....	11
2.2.4	Page Location .....	11
2.2.5	Page Validations .....	<b><u>Error! Bookmark not defined.</u></b>
2.3	EDBC List page .....	13
2.3.1	Overview.....	13
2.3.2	EDBC List Page Mockup .....	13
2.3.3	Description of Changes .....	13
2.3.4	Page Location .....	13
2.4	Medi-Cal EDBC Rules.....	14
2.4.1	Overview.....	14
2.4.2	Description of Change .....	14
2.5	eHIT.....	16
2.5.1	Overview.....	16
2.5.2	Description of Change .....	16
2.6	Batch EDBC (CalSAWS only) .....	17
2.6.1	Overview.....	17
2.6.2	Description of Change .....	17
2.7	Generate Non-MAGI Screening Packet .....	18

2.7.1 Overview..... 18

2.7.2 Description of Change ..... 18

2.7.3 Execution Frequency ..... 19

2.7.4 Key Scheduling Dependencies ..... 19

2.7.5 Counties Impacted ..... 19

2.7.6 Failure Procedure/Operational Instructions..... 19

2.8 MAGI Emulator ..... 20

2.8.1 Overview..... 20

2.8.2 Description of Change ..... 20

2.9 Automated Regression Test..... 21

2.9.1 Overview..... 21

2.9.2 Description of Change ..... 21

3 Supporting Documents ..... 22

4 Requirements ..... 22

4.1 Project Requirements ..... 22

5 Appendix..... 23

5.1 CalHEERS functionality for Soft Pause ..... 23

DRAFT

## 1 OVERVIEW

---

Per guidance provided in ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-Modified Adjusted Gross Income (MAGI) Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

This SCR will update The Systems to prevent advancing the Medi-Cal renewal with a Soft Pause individual.

### 1.1 Current Design

When a MAGI Medi-Cal individual reports a change or is reevaluated during the annual renewal period, CalHEERS protects the individual from adverse actions to their MAGI Medi-Cal eligibility by placing the individual in Soft Pause. The annual renewal period begins two months prior to the RE Due Date until the program is renewed.

Soft Pause protects the individual until the County Eligibility Worker (CEW) evaluates the individual for MAGI Medi-Cal with a premium or for other Medi-Cal programs not subject to MAGI, such as Non-MAGI Medi-Cal or Consumer Protection Programs (CPPs).

CalHEERS Soft Pause protections will continue until Soft Pause is lifted by a CEW through an Eligibility Determination Request (EDR). Once Soft Pause is lifted, adverse actions can be applied per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual can be moved to another aid code or discontinued from MAGI Medi-Cal.

With CalHEERS Release 16.4, C-IV SCR 2713 and LRS SCR 36160 updated **The Systems** with functionality to allow a CEW to send a 'Soft Pause Lift' indicator to CalHEERS in an EDR. When CalHEERS receives the 'Soft Pause Lift' indicator, CalHEERS lifts Soft Pause and applies adverse actions per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual is moved to another aid code or discontinued from MAGI Medi-Cal. CalHEERS sends a MAGI Determination of Eligibility Response (DER) to The Systems with the individual's new MAGI Medi-Cal eligibility/discontinuance and the Eligibility Evaluation Reason code 'Soft Pause Lift'. The CEW can then move the individual to the new MAGI Medi-Cal aid code or evaluate the individual for Non-MAGI Medi-Cal.

C-IV Medi-Cal EDBC Batch skip logic will skip a case with skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause. C-IV then generates through batch a Non-MAGI Screening Packet for the individual skipped for 'Soft Paused'. This allows the C-IV CEW to manually request the 'Soft Pause Lift' to determine the individual's correct benefits when the Non-MAGI Screening Packet is returned. CalSAWS does not have the Non-MAGI Screening Packet, this Medi-Cal Batch EDBC Skip logic nor the batch to generate

the Non-MAGI Screening Packet. CalSAWS CA-203981 added the Non-MAGI Screening Packet to the template repository in Release 19.11.

The Systems allows CEWs to run Medi-Cal EDBC against a MAGI Determination that contains an individual in Soft Pause and establish a new annual renewal period. When an individual is in Soft Pause, the MAGI Determination provides the updated income and household size information with incorrect Federal Poverty Level (FPL) limit. As a result, during MAGI Renewals, The Systems generates a MAGI Renewal Notice of Action (NOA) with the incorrect FPL amounts. This can be misleading to the individual.

C-IV allows the CEW to select the 'RE' EDBC Run Reason during the annual renewal period and outside the annual renewal period to establish a new renewal period when processing a reported change. In C-IV 'RE' EDBC Run Reason is displayed when EDBC benefit month is on or after the Re-Evaluation begin month.

CalSAWS allows a worker to select a Run Reason from the EDBC Run Reason dropdown only when running Medi-Cal EDBC for a single-month. In CalSAWS 'RE' EDBC Run Reason is displayed only if the benefit month is after the Re-Evaluation due date or if a 'RE' packet exists for the 'RE' due month.

C-IV sends 'Renewal – manual renewal' (RM) EDR Run Reason to CalHEERS during the annual renewal period starting with the EDR Benefit Month two months prior to the RE Due Date and beyond.

For example: A Medi-Cal program has RE Due Date 06/30/2020.

Beginning with EDR benefit month 05/2020 and beyond, C-IV sends 'RM' EDR Run Reason until a new annual renewal period is established.

CalSAWS does not send 'RM' EDR Run Reason.

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the next RE period begin date and exists a valid open RE record for the program or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'

C-IV does not have functionality to automatically set the EDBC Run Reason to 'RE', but C-IV does have a page validation on Run EDBC and Negative Action Detail pages that requires the worker to run EDBC with 'RE' Run Reason when all the following are true:

- The latest MAGI determination for the benefit month has a 'RE' or 'RM' Run Reason.
- The benefit month is no earlier than one month prior to 'RE' due month.
- 'RE' Run Reason was not selected while running EDBC.
- Not an Auto Test scenario.

© 2019 CalACES. All Rights Reserved.

The MAGI Emulator allows testing of changes to The Systems that rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment. The MAGI Emulator does not have functionality to return Soft Pause or Soft Pause Lift in the MAGI Determination. See the current functionality of MAGI Emulator in Supporting Documents.

## 1.2 Requests

Per ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-MAGI Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

1. Require the CEW to lift Soft Pause prior to running Medi-Cal EDBC with 'RE' EDBC Run Reason.
2. Add a new EDBC Run Reason, 'Soft Pause/Non-RE', that will allow a CEW to run Medi-Cal EDBC during the annual renewal period with an individual in Soft Pause that will not advance the renewal due date. This 'Soft Pause/Non-RE' EDBC Run Reason should only be used for exceptions when the CEW is unable to lift Soft Pause due to 10-day noticing or CalHEERS issues. For example: a 'Person Add' during renewal or to process a Negative Action for a non-Soft Pause individual while waiting for the Non-MAGI Screening Packet for the Soft Pause individual.
3. Update CalSAWS Batch EDBC Skip logic to skip a case with a new skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause.
4. Update CalSAWS to generate a Non-MAGI Screening Packet when an individual is skipped through batch for Soft Pause and the MAGI Determination Run Reason code is 'Renewal - batch administrative renewal' (RE).
5. Update CalSAWS to create a Journal entry when the Non-MAGI Screening Packet is generated through batch.
6. Update CalSAWS to allow CEW to select 'RE' EDBC Run Reason to establish a new renewal period during reported changes outside the annual renewal period.
7. Update CalSAWS to send 'RM' EDR Run Reason during the annual renewal period.
8. Update The Systems to automatically set the EDBC Run Reason to either 'RE' or 'Soft Pause/Non-RE' when appropriate during the annual renewal period.
9. Update the MAGI Emulator to have Soft Pause and Soft Pause Lift functionality to allow the testing of changes in The Systems which rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment.

## 1.3 Overview of Recommendations

1. Add a page validation on 'Negative Action Detail' page to prevent CEWs from running Medi-Cal EDBC with 'RE' EDBC Run Reason if the valid MAGI

Determination has at least one individual on the program with Eligibility Evaluation Reason of Soft Pause and the individual is not being Negative Actioned.

2. Add Medi-Cal EDBC Run Reason Code 'Soft Pause/Non-RE' to The Systems to allow the CEW to run EDBC without advancing the renewal when an individual is in Soft Pause.
3. Update CalSAWS to send 'Renewal – manual renewal' (RM) EDR Run Reason when a worker sends an EDR during the annual renewal period.
4. Update The Systems to auto-set the EDBC run reason to either 'Soft Pause/Non-RE' or 'RE' during EDBC evaluation at annual renewal when specific criteria is met.
5. Update CalSAWS Batch EDBC skip logic to skip a case with a skip reason 'Soft Paused' when the MAGI Determination used by EDBC has at least one individual with Eligibility Evaluation Reason of Soft Pause.
6. Create a batch in CalSAWS to automatically generate the Non-MAGI Screening Packet and create a Journal entry when an individual is skipped through Batch EDBC for 'Soft Paused' and the DER has Run Reason 'RE'.
7. Update the MAGI Emulator with Soft Pause and Soft Pause Lift options.

#### 1.4 Assumptions

None of these changes apply to CMSP.



## 2 RECOMMENDATIONS

### 2.1 Run EDBC page

#### 2.1.1 Overview

Update the Run EDBC page to display 'Soft Pause/Non-RE' and 'RE' EDBC Run Reasons and add validations to prevent a CEW from advancing the Medi-Cal RE Due Date when an individual is Soft Paused.

#### 2.1.2 Run EDBC Page Mockup

Program	Status	Timely Notice Exception	Reason	Run Reason
Medi-Cal	Active			Soft Pause/Non-RE TMC 176 S TMC 176 S/RE

Figure 2.1.2.1 – Run EDBC Page (C-IV)

Program	Status	Timely Notice Exception	Reason	Run Reason
Medi-Cal	Active			Soft Pause/Non-RE

Figure 2.1.2.2 – Run EDBC Page (CalSAWS)

### 2.1.3 Description of Changes

1. **CalSAWS only:** Update CalSAWS to display 'RE' EDBC Run Reason in the Run Reason drop down for the Medi-Cal program when the EDBC benefit month is on or after the current Re-Evaluation begin month.
2. Display 'Soft Pause/Non-RE' in the Run Reason drop down for the Medi-Cal program when the valid MAGI Determination for the benefit month has at least one individual on the program with Eligibility Evaluation Reason of Soft Pause. Do not display 'RE' Run Reason if 'Soft Pause/Non-RE' Run Reason is displayed.

### 2.1.4 Page Location

**Global:** Eligibility  
**Local:** Customer Information  
**Task:** Run EDBC

## 2.2 Negative Action Detail page

### 2.2.1 Overview

Update Negative Action Detail page to display 'Soft Pause/Non-RE' EDBC Run Reason and prevent a CEW from advancing the renewal when an individual is Soft Paused.

### 2.2.2 Negative Action Detail Page Mockup

**Negative Action Detail**

\*- Indicates required fields Run EDBC

**Benefit Month:** \*  
04/2019

**Medi-Cal #3** Run EDBC for this program

Person	SSN	Date of Birth
<input type="checkbox"/> ABCBCBC		04/22/2011
<input type="checkbox"/> KJSSJKDSJD		01/26/1987
<input type="checkbox"/> KJHSKJDHKS		07/05/2016

**Negative Action Reason:**  
▼

**Run Reason:**  
RE  
Soft Pause/Non-RE  
TMC 176 S  
TMC 176 S/RE

Run EDBC for this program

Figure 2.2.2.1 – Negative Action Detail Page (C-IV)

© 2019 CalACES. All Rights Reserved.

**Negative Action Detail**

\*- Indicates required fields Run EDBC

Benefit Month: \*  
04/2019

**Medi-Cal #3** Run EDBC for this program

<input type="checkbox"/> Person	SSN	Date of Birth
<input type="checkbox"/> ABCBCBC		04/22/2011
<input type="checkbox"/> KJSSJKDSJD		01/26/1987
<input type="checkbox"/> KJHSKJDHKS		07/05/2016

Negative Action Reason:

Run Reason:  
RE  
Soft Pause/Non-RE  
CalFresh

Run EDBC for this program

Figure 2.2.2.2 – Negative Action Detail Page (CalSAWS)

### 2.2.3 Description of Changes

1. **CalSAWS only:** Update CalSAWS to display 'RE' EDBC Run Reason in the Run Reason drop down for the Medi-Cal program when the EDBC benefit month is on or after the current Re-Evaluation begin month.
2. Display 'Soft Pause/Non-RE' in the Run Reason drop down for the Medi-Cal program when the valid MAGI Determination for the benefit month has at least one individual on the program with Eligibility Evaluation Reason of Soft Pause

### 2.2.4 Page Location

**Global:** Eligibility  
**Local:** Case Summary  
**Task:** Negative Action Detail

## 2.3 Create Manual EDBC page

### 2.3.1 Overview

Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.

### 2.3.2 Create Manual EDBC Mockup

Figure 2.3.2.1 – Create Manual EDBC Page (C-IV)

Figure 2.3.2.2 – Create Manual EDBC (CalSAWS)

### 2.3.3 Description of Changes

1. Display 'Soft Pause/Non-RE' in the Run Reason drop down for the Medi-Cal program on Create Manual EDBC page.

### 2.3.4 Page Location

**Global:** Eligibility  
**Local:** Customer Information  
**Task:** Create Manual EDBC

## 2.4 EDBC List page

### 2.4.1 Overview

Update the EDBC List page to display a notification message when 'Soft Pause/Non-RE' Run Reason is auto-set during the Medi-Cal EDBC evaluation.

### 2.4.2 EDBC List Page Mockup

The screenshot shows the EDBC List page with a notification message at the top: "• EDBC was run with Soft Pause/Non-RE Run Reason and RE was not advanced." Below the notification is the "EDBC List" header and a "Cancel" button. The page includes search filters for "Display by:", "Program:", "Type Reason:", "From:", and "To:". The "From:" field is set to "07/2019" and the "To:" field is set to "09/2019". A "View" button is located to the right of the "To:" field. Below the filters is a "Search Results Summary" section with "Results 1 - 2 of 2". The results are displayed in a table with the following columns: Begin Month, End Month, Program, Type, Run Status, Auth Amount, Date Run, and EDBC Source. The table contains two rows of data. At the bottom of the page, there is a "Cancel" button and a footer message: "This Type\_1 page took 1.31 seconds to load."

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
08/2018		Medi-Cal	Regular	Accepted - Saved	Details	07/09/2019	Online EDBC Rules
08/2019		Medi-Cal	Regular	Not Accepted	Details	07/09/2019	Online EDBC Rules

Figure 2.3.2.1 – EDBC List Page

### 2.4.3 Description of Changes

1. Update the EDBC List page to display a notification message, "EDBC was run with Soft Pause/Non-RE Run Reason and RE was not advanced." when The Systems auto-sets the Run Reason to 'Soft Pause/Non-RE' during EDBC evaluation.
2. **C-IV only:** Remove the page validation on Medi-Cal EDBC Summary page that requires the worker to cancel the EDBC and run EDBC with 'RE' Run Reason.

### 2.4.4 Page Location

**Global:** Eligibility  
**Local:** Customer Information  
**Task:** EDBC List

## 2.5 Medi-Cal EDBC Rules

### 2.5.1 Overview

Update the Medi-Cal EDBC Rules to not advance the RE Due Date when Medi-Cal EDBC is run with 'Soft Pause/Non-RE' Run Reason. Update The Systems to auto-set the EDBC Run Reason to either 'Soft Pause/Non-RE' or 'RE' when appropriate.

### 2.5.2 Description of Change

1. Add a new EDBC Run Reason 'Soft Pause/Non-RE' (CT\_744) for the Medi-Cal program.
  - a. Update Medi-Cal RE functionality to not advance the RE Due Date when Medi-Cal EDBC is run with 'Soft Pause/Non-RE' EDBC Run Reason.
2. Update The Systems to auto-set the EDBC Run Reason to 'RE' during EDBC evaluation when the following conditions are met:
  - A. Non-MAGI Medi-Cal only
    - a. The program selected is Medi-Cal
    - b. All individuals active on Medi-Cal have a Non-MAGI aid code.
    - c. The EDBC Run Reason is not specified by the worker or batch
    - d. The benefit month is equal to the next RE period begin date and
      - i. there exists a valid open RE record for the program
      - or
      - ii. the benefit month is equal to come-up month.
    - e. The appropriate MC RE packet exists for the month of the RE Due Date for the program.
    - f. The latest MC RE packet status is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'.
    - g. Not an auto-test scenario
  - B. Mixed MAGI/Non-MAGI Medi-Cal
    - a. The program selected is Medi-Cal
    - b. At least one individual active on Medi-Cal has a MAGI aid code and at least one individual active on Medi-Cal has a Non-MAGI aid code.
    - c. The EDBC Run Reason is not specified by the worker or batch
    - d. The benefit month is equal to the next RE period begin date and
      - i. there exists a valid open RE record for the program
      - or
      - ii. the benefit month is equal to come-up month.

- e. The appropriate MC RE packet exists for the month of the RE Due Date for the program.
  - f. The latest MC RE packet status is 'Not Applicable' or 'Reviewed-Ready to Run EDBC'.
  - g. The valid DER for the benefit month has 'RM', or 'RE' Run Reason
  - h. The valid DER for the benefit month does not contain any Soft Pause individual
  - i. Not an auto-test scenario
- C. MAGI Medi-Cal only
- a. The program selected is Medi-Cal
  - b. All individuals active on Medi-Cal have a MAGI aid code.
  - c. The EDBC Run Reason is not specified by the worker or batch
  - d. The benefit month is equal to the next RE period begin date and
    - i. there exists a valid open RE record for the program or
    - ii. the benefit month is equal to come-up month.
  - e. The valid DER for the benefit month has 'RM', or 'RE' Run Reason
  - f. The valid DER for the benefit month does not contain any Soft Pause individual
  - g. Not an auto-test scenario.

**Note:**

**Following are 'Appropriate MC RE Packet' for C-IV:**

- i. MAGI RE Packet
- ii. Aged, Blind, Disabled (ABD) Medi-Cal Redetermination Packet
- iii. MAGI and Non-MAGI Redetermination Packet
- iv. Regular Medi-Cal/ ABD RE Packet (Signature packet)
- v. Regular Medi-Cal Redetermination Packet
- vi. LTC Mixed Household RE Packet (Signature Packet)
- vii. LTC RE Packet (Signature Packet)
- viii. Long Term Care (LTC) Medi-Cal Redetermination Packet
- ix. Non-MAGI Long Term Care (LTC) Mixed Household Redetermination packet
- x. Non-MAGI Turning 65 Packet
- xi. Non-MAGI Screening Packet (Non MAGI Screening Packet is considered 'Appropriate MC RE Packet' when submit month equals the Med-Cal program's RE Due Month.)

**Following are 'Appropriate MC RE Packet' for CalSAWS:**

- i. ABD MC RE Packet
- ii. MAGI MC Packet
- iii. Mixed MC RE Packet
- iv. LTC MC RE Packet

© 2019 CalACES. All Rights Reserved.

- v. MC 604 IPS Packet
  - vi. MC RE Packet
  - vii. MSP Packet
3. Update The Systems to auto-set the EDBC Run Reason to 'Soft Pause/Non-RE' during EDBC evaluation when the following conditions are met:
- a. The program selected is Medi-Cal
  - b. All individuals active on Medi-Cal have a MAGI aid code.
  - c. The EDBC Run Reason is not specified by the worker or batch
  - d. The benefit month is equal to the next RE period begin date and
    - i. there exists a valid open RE record for the program
    - or
    - ii. the benefit month is equal to come-up month.
  - e. The valid DER for the benefit month has 'RM', or 'RE' Run Reason
  - f. The valid DER for the benefit month contains at least one Soft Pause individual

## 2.6 eHIT

### 2.6.1 Overview

Update eHIT Disposition functionality for the new EDBC Run Reason 'Soft Pause/Non-RE'. Update eHIT logic in CalSAWS to have RM EDR Run Reason functionality.

### 2.6.2 Description of Change

1. Update eHIT Disposition logic to not send a Disposition to CalHEERS when Medi-Cal EDBC is run with 'Soft Pause/Non-RE' Run Reason.
2. **CalSAWS only:** Update eHIT logic to send 'Renewal – manual renewal' (RM) EDR Run Reason to CalHEERS beginning with the EDR Benefit Month two months prior to the RE Due Date and beyond.
3. **CalSAWS only:** Update eHIT Auto-Disposition logic to not send a Disposition to CalHEERS when the DER has 'RM' Run Reason and all individuals on the DER are MAGI Pending.
 

**Note:** The current eHIT Disposition logic will send a Disposition for every DER for the same benefit month as EDBC when EDBC is run with 'RE' Run Reason. This functionality will not change.



## 2.7 Batch EDBC (CalSAWS only)

### 2.7.1 Overview

Add a Batch EDBC Skip Reason 'Soft Paused' that will skip a case from Batch EDBC processing when the valid DER has at least one individual with Eligibility Evaluation Reason of Soft Pause.

### 2.7.2 Description of Change

1. Add a new Batch EDBC Skip reason of "Soft Paused" to the 'Not Processed Reason Codes' category (CT\_707).

Batch EDBC Skip reason	Description
New/Update	New
Category Id	707
Code Num Identif	'Implementation TBD'
Short Decode Name	Soft Paused
Long Decode Name	Soft Paused
Begin date	Default System Min Date / 01-JAN-00 00:00:00
End date	Default System High Date /31-DEC-99 00:00:00

2. Update Batch EDBC Skip logic to skip a case with a new skip reason 'Soft Paused' when all the following are true:
  - a. The program is Medi-Cal.
  - b. The valid DER used by EDBC has at least one individual with Eligibility Evaluation Reason of Soft Pause.

## 2.8 Generate Non-MAGI Screening Packet

### 2.8.1 Overview

Create a new batch job for CalSAWS and update the existing batch job for C-IV to check for cases which are skipped during Batch EDBC with the reason of Soft Pause.

- **CalSAWS only:** The Non-MAGI Screening Packet was added to the template repository in CalSAWS with CA-203981 in Release 19.11. Create a new batch process to automatically send the Non-MAGI Screening Packet when an individual is skipped from Batch EDBC during the MAGI RE process.
- **C-IV only:** - The existing 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.

### 2.8.2 Description of Change

1. Create a new batch job for CalSAWS and update the existing batch job for C-IV (PB00R526) to send the Non-MAGI Screening Packet when the following conditions are true:
  - a. Case is skipped from Batch EDBC due to the reason of "Soft Pause"  
Note: Record exists in BATCH\_ELIG\_NOT\_PROC table with NOT\_PROC\_RSN\_CODE of SP.
  - b. There does not exist a Non-MAGI MC RE Packet or Mixed MC RE Packet ((MC RE Packet also contains the MC 604 IPS)) for the same effective month.
2. For each record returned in the driving query, insert a record into the batch transaction table to generate a Non-MAGI Screening Packet during forms processing.

Transaction values:

- Case ID: Case associated to the skipped EDBC record
- Program ID: Medi-Cal program ID
- Person ID: Primary Applicant of Active Medi-Cal program
- Type Code: FR
- Sub Type Code: NM
- Eff Date:
- Created By: Batch
- Updated By: Batch

3. **CalSAWS only:** Add the following custom Journal entry when the for Non-MAGI Screening Packet is generated through Batch.

**Journal Category:** All

**Journal Type:** Document

**Short description:** Non-MAGI Screening 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, APTC/CSR Brochure, and VRC. These items are due in 30 days.

### 2.8.3 Execution Frequency

Daily

### 2.8.4 Key Scheduling Dependencies

Prior to forms processing

### 2.8.5 Counties Impacted

All 40 Counties

### 2.8.6 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

## 2.9 MAGI Emulator

### 2.9.1 Overview

Update the MAGI Emulator to return MAGI Determinations with Soft Pause and Soft Pause Lift. The MAGI Emulator is used for testing purposes only to emulate the results returned from CalHEERS on a MAGI Determination.

### 2.9.2 Description of Change

1. Add Soft Pause functionality to the MAGI Emulator with the following criteria:
  - If the life event code is blank and the second digit of the SSN is a '2', then return a MAGI Determination with Eligibility Evaluation Reason of 'Soft Pause' for that individual (in addition to current functionality that determines the individual eligibility and aid code by last digit of the SSN).
2. Add Soft Pause Lift functionality to the MAGI Emulator with the following criteria:
  - If the life event code is blank and the EDR has Soft Pause Lift indicated, then return a MAGI Determination with the individual MAGI Discontinue (no aid code) with Eligibility Evaluation Reason of 'Soft Pause Lift' (regardless of the last digit of their SSN).
  - If the life event code is "Had a Baby" and the EDR has Soft Pause Lift indicated, then return a MAGI Determination with the individual MAGI Eligible to aid code T2 with Eligibility Evaluation Reason of 'Soft Pause Lift' (regardless of the last digit of their SSN).

## 2.10 Automated Regression Test

### 2.10.1 Overview

New regression test scripts will be created to verify the Soft Pause validation message on the Run EDBC and negative Action Detail pages, and the RE and Soft Pause/Non-RE Run Reasons on these same pages.

### 2.10.2 Description of Change

#### **EDBC Validation:**

Create new regression test scripts to verify that the appropriate new validation message displays in each of the following scenarios:

1. When attempting to run and accept regular EDBC with the 'RE' Run Reason for a benefit month in which the latest DER has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause.
2. When attempting to run and accept Negative Action EDBC with the 'RE' Run Reason for a benefit month in which the latest DER has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause.

#### **Soft Pause/Non-RE:**

Create new regression test scripts to verify that EDBC can be run, and the RE Due Month not updated in each of the following scenarios:



1. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause, and regular EDBC is being run with the 'Soft Pause/Non-RE' run reason.
2. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause, and Negative Action EDBC is being run with the 'Soft Pause/Non-RE' run reason.

#### **Soft Pause Lift at RE:**

Create new regression test scripts to verify that EDBC can be run, and the RE Due Month is updated in each of the following scenarios:

1. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of 'Soft Pause Lift', and regular EDBC is being run with the 'RE' run reason.
2. When the latest DER for the benefit month has one or more individuals with an Eligibility Evaluation Reason Code of Soft Pause, and Negative Action EDBC is being run with the 'RE' run reason.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Medi-Cal	ACWDL 17-35 Implementation of the Soft Pause Removal through the Statewide Automated Welfare System	 ACWDL 17-35.pdf
2	Test	Current MAGI Emulator Behavior	 MAGI Emulator Behavior_08-01-2015

### 4 REQUIREMENTS

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.2.42	The LRS shall identify special Medi-Cal processing situations, including Sneed, Retro Medi-Cal, 1931 (b), QMB, SLMB, DDS, Pickle, Medi-Cal bridging, and STP, and shall ensure that the necessary information is collected in order to determine eligibility for these programs.	LRS will now identify a MAGI Medi-Cal case in Soft Pause during renewal, generate a Non-MAGI Screening Packet to ensure necessary information is collected to determine eligibility.
2.8.1.7	The LRS shall determine when an individual is eligible for Medi-Cal coverage and shall ensure that all required information is collected, eligibility is determined, and share of cost is computed.	LRS will now prevent a worker from continuing MAGI Medi-Cal when an individual is in Soft Pause until all required information is collected, eligibility is determined, and share of cost is computed.

## 5 APPENDIX

---

### 5.1 CalHEERS functionality for Soft Pause

Adverse actions for which CalHEERS will trigger Soft Pause include:

- Moving from MAGI Medi-Cal to Advanced Premium Tax Credits/Cost Sharing Reductions/Covered California Programs (APTC/CSR/CCP)
- Moving from non-premium MAGI Medi-Cal to premium MAGI Medi-Cal
- Moving from full scope MAGI Medi-Cal to limited or restricted scope MAGI Medi-Cal
- Moving from full scope MAGI Medi-Cal to pregnancy-related Medi-Cal
- Losing eligibility for MAGI Medi-Cal, including, but not limited to, turning 65 years old, becoming eligible for Medicare before age 65, or experiencing an increase in income that renders the individual ineligible due to being over program income limits

The Soft Pause groups are comprised of individuals who meet one or more of the following criteria:

- aged 65 or older
- attesting to blindness
- attesting to being disabled
- becoming eligible for Medicare
- a parent of a child under age 21
- a caretaker relative of a child under age 21
- a child under age 21
- a pregnant woman with income over 138 percent Federal Poverty Level up to the end of the 60-day post-partum period