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## CalSAWS | Batch Memorandum Call for
## One-time Batch to Transition Young Adult Expansion

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|---|---|
| Date: November 06, 2019 | Regulation: Senate Bill (SB) 104 |
| Time: 10-11AM | Meeting Called by: CalSAWS |
| Attendees: PPOCs, RMs, MC Committee Members, CalSAWS | |

### Memorandum Purpose

This memorandum is intended to convey the batch scope, county actions and schedule for the one-time batches to transition young adults from restricted scope to full scope Medi-Cal.

### Background

- *CA-206941|CIV-103662|CalHEERS Change Request CH-139211*

On September 23, 2019 (Release 19.09), CalHEERS and The Systems updated eligibility rules for Young Adult Expansion to grant full scope 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 meet all the other eligibility criteria. The Young Adult Expansion eligibility rules will begin on November 20, 2019 for January 2020 benefit month or later.

- CA-209232|CIV-104457|CA-209109|CIV-104415

On November 14, 2019, The Systems' NOA verbiage will be updated with the NOA verbiage provided by Department of Health Care Services (DHCS) for Young Adult Expansion for NOAs created for January 2020 benefit month or later. The newly added Non-MAGI fragments will be available only in English and Spanish with this effort and will include the GEN 1365. Threshold language fragments will be added with the SCRs CA-209956 and CIV-104826 in a future release.

### Scope

- *CA-208241|CIV-104022*

On Friday, November 22, 2019, The Systems will begin the transition of Young Adult Expansion by initiating a one-time process to send Eligibility Determination Requests (EDRs) through batch MAGI to CalHEERS for identified individuals 19 to 25 years of age, inclusive, who are receiving restricted scope MAGI Medi-Cal.

Then on Saturday, November 23, 2019, The Systems complete the automated transition of Young Adult Expansion by running batch EDBC for all identified individuals 19 to 25 years of age, inclusive, who are receiving restricted scope Medi-Cal to transition to full scope Medi-Cal.

On Monday, November 25, 2019, one-time lists will be posted to the CalSAWS Web Portal for County follow-up of the Young Adult Expansion population who remain in restricted scope Medi-Cal after the automated transition batch processing is complete.

**Batch**

The Systems will 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.

**Batch MAGI**

I. Identify Medi-Cal programs that meet all the following conditions for one-time Batch MAGI processing for January 2020:

   a. The Medi-Cal program contains an individual that meets all of the following conditions:

      i. The individual's 19$^{th}$ birthday is on or before 01/01/2020.

      ii. The individual's 26$^{th}$ 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 on or after 11/20/2019.

   d. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or manual EDBC.

   e. **CalSAWS only:** The program is not assigned to a Child Welfare Program Worker.

II. Send the EDR with "Continuing" (CO) EDR Run Reason for benefit month January 2020.

**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 January 2020:

        a. The Determination of Eligibility Response (DER) is received from Batch MAGI 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 Batch MAGI 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. **CalSAWS 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.

B.     **Non-MAGI Medi-Cal**

    I. Identify Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing January 2020:

        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 19th birthday is on or before 01/01/2020.

            ii. The individual's 26th 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 on or after 11/20/2019.

        d. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or Manual EDBC.

        e. **CalSAWS 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.

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**Journal Entry**

A journal entry will be created with the following information for each case processed successfully through Batch EDBC from the Young Adult Expansion one-time transition batch.

> **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.

**List Details**

Three lists will be posted to aid the counties to complete the transition of young adults to full scope Medi-Cal after Batch EDBC completes. The lists will be available to the counties at the following locations:

**C-IV** - CalSAWS Web Portal>System Changes>SCR and SIR Lists>2019>CIV-104022
**CalSAWS** - CalSAWS Web Portal>System Changes>SCR and SIR Lists>2019>CA-208241

The lists will display the standard columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker
- Benefit Month

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 19th birthday is on or before 01/01/2020 and 26th 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 (CalSAWS 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.

**Things to remember about this batch process**
- In the scenario where multiple active Medi-Cal programs exist for one case, batch EDBC will run all active Medi-Cal programs on the case together. This ensures correct LTC allocation between the multiple programs. This process will not run non Medi-Cal programs.
- All impacts from Defects and SCRs that have not been implemented will continue to occur during the batch processing.
- The programs targeted for batch processing are determined once upfront. For batch processes that take more than one business day, cases are not removed or added to the batch processing based on user updates.
- The Batch EDBCs will have an EDBC Source of 'Batch EDBC Rules'.
- When a worker runs EDBC in which a prior pending month exists, the EDBC will result in a Read-Only status. However, when running a Batch EDBC process, that restriction does not apply and such EDBCs will not be Read-Only.
- Any updates or lack of updates made/not made to cases will impact the Batch EDBC results. This means programs may be discontinued (due to non-compliances, etc.) unexpectedly.

- When the batch process starts,
  - The Ad-Hoc reporting database will have the updates by 6:00 AM, Monday, November 25, 2019.
  - Both systems will transfer MEDS file to MEDS as per the usual process.
    - CalSAWS and C-IV transfer the file by Sunday, November 24, 2019; but MEDS will not process the file until 03:00 pm on Monday, November 25, 2019. This is the normal process for the files sent over the weekend.
  - NOAs will be sent to Central Print at night through the regular nightly batch process.

## Development Schedule

| Task | C-IV & CalSAWS |
|---|---|
| October 17, 2019 | Deliver the changes to the System Test team |
| October 21, 2019 | Start System Testing the changes |
| November 06, 2019 | Review the batch process schedule with counties (Memorandum Call) |
| November 22, 2019 | Run batch MAGI in production to transition Young Adult Expansion |
| November 23, 2019 | Run batch EDBC in production transition Young Adult Expansion |
| November 25, 2019 | Post lists to the CalSAWS Web Portal |
| January 15, 2020* | Automated age-change batch for beneficiaries turning age 26 |

*The age 26 batch will run on the 10th business day of the month. The 2020 County Holiday Calendar is not yet published so January 15, 2020 is based on the tentative 2020 County Holiday Calendar.

## Schedule Considerations
- Downtime
  There will be no downtime related to this one-time batch process.

- Scheduled Batch Jobs
  Batch Jobs scheduled for Friday, November 22nd and Saturday, November 23rd will run per current schedule.

- Approximate count of programs to be processed for Batch MAGI

| Benefit Month | CalSAWS Program Count | C-IV Program Count |
|---|---|---|
| January 2020 | 23,230 | 13,721 |

- Approximate count of programs to be processed for Batch EDBC

| Benefit Month | CalSAWS Program Count | C-IV Program Count |
|---|---|---|
| January 2020 | 23,845 | 14,365 |

**Timeline**
- Expected start of Batch EDBC processing
  - CalSAWS – November 23, 2019 - 6:00 AM C-IV – November 23, 2019 - 7:00 AM
- Expected completion of Batch EDBC processing CalSAWS – November 23, 2019 – 8:00 PM C-IV – November 23, 2019 – 4:00 PM

**Additional related Young Adult Expansion system changes**
- CA-207950 | CIV-103874

On January 10, 2020, The Systems will be updated with an automated age-change batch for beneficiaries turning age 26. The new age-change batch for turning 26 will reevaluate adults for the correct scope of Medi-Cal after aging out of the Young Adult Expansion population. There will also be modifications to close gaps between CalSAWS and C-IV with Medi-Cal age 19 and age 21 reevaluation batch jobs. These age-change batches will run for the first time for the February 2020 benefit month.

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**C-IV Calendar November 2019**

| SUN | MON | TUES | WED | THUR | FRI | SAT |
|---|---|---|---|---|---|---|
| | | | | | 1<br>Batch MAGI RE | 2 |
| 3<br>C-IV System Down | 4<br>SAR7 Disc | 5 | 6<br><br>**Memorandum Call** | 7 | 8 | 9 |
| 10<br>C-IV System Down | 11 | 12<br>Send NA 960X Notice | 13 | 14 | 15<br>CW/CF RE Packets | 16 |
| 17<br>C-IV System Down | 18<br>Ten-Day Disc | 19 | 20 | 21 | 22<br>Main Payroll<br><br>Send SAR7/SAR2<br><br>MC Reminder<br><br>**CIV-104022 One-time Batch MAGI to Transition YAE from Restricted to Full Scope Medi-Cal** | 23<br>Balderas Reminder<br><br>Quarterly MEDS Recon<br><br>**CIV-104022 One-time EDBC Batch to Transition YAE from Restricted to Full Scope Medi-Cal** |
| 24<br>C-IV System Down<br><br>MEDS Recon Jobs (starts 6:00am) | 25<br>SAR7/QR7 generated<br><br>SAR 22 generated | 26 | 27 | 28 | 29 | 30 |

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## CalSAWS Calendar November 2019

| SUN | MON | TUES | WED | THUR | FRI | SAT |
|---|---|---|---|---|---|---|
| | | | | | 1<br>PA 125 Form<br><br>PA 1725<br><br>SAR 2103 form<br><br>Batch MAGI RE | 2 |
| 3 | 4<br>FS NEC Form<br><br>GR AA/CAPI<br><br>Mail Out MC Catch Up | 5<br>CW/CFR RDs 1st appt | 6<br>CW/CFR RDs 2nd appt<br><br>**Memorandum Call** | 7<br>Send NA 960X Notice<br><br>Mail Out GR AA/CAPI | 8<br>Mail Out CW/CFR Appt Packets | 9 |
| 10 | 11 | 12<br>NOA 290-1 Form<br><br>NA 960X SAR Form | 13<br>MC RE Packets | 14 | 15 | 16<br>MAGI EDR<br><br>NA REX M40 - 181A<br><br>LRS CW 42-46 Month Time Limit NOAs |
| 17 | 18<br>10-Day Disc Monthly Batch NOA generation | 19<br>MAIL OUT 10-DAY NOAs | 20 | 21<br>Mail Out MC RE Packets | 22<br>Main Payroll<br><br>MC Reminder<br><br>CW Reminder<br><br>MC TMC 176 Form<br><br>**CA-208241 One-time Batch MAGI to Transition YAE from Restricted to Full Scope Medi-Cal** | 23<br>Balderas Reminder<br><br><br><br>**CA-208241 One-time EDBC Batch to Transition YAE from Restricted to Full Scope Medi-Cal** |
| 24<br>MEDS Recon Jobs (starts 6:00am) | 25<br>SAR7/QR7 generated<br><br>SAR 22 generated | 26 | 27 | 28 | 29 | 30<br>Mail Out SAR7/QR7 |