

CalSAWS

California Statewide Automated Welfare System

Design Document

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Add Medi-Cal Negative Action Reason 'Worker
Initiated-Skip CalHEERS'

Version 1.0

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DRAFT

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1 OVERVIEW

The purpose of this document is to define an enhancement to The Systems to allow a County Eligibility Worker (CEW) to close a Medi-Cal program that is linked to a CalHEERS case without communicating to CalHEERS.

This SCR adds negative action reason "Worker Initiated-Skip CalHEERS" to the Negative Action Detail page for the Medi-Cal program only. The negative action will be a program-level negative action and apply to all open persons at the same time. The Worker can Run EDBC without requesting a Negative Action MAGI Determination and close the Medi-Cal program in The Systems. The negative action will have security-driven validation to limit use only to specified users.

1.1 Current Design

When a Medi-Cal program is linked to a CalHEERS case, The Systems require a negative action MAGI determination for all negative action reasons except 'Inter-County Transfer'.

However, there are instances when requesting a negative action MAGI Determination results in an error returned from CalHEERS.

For Example:

If the case is closed on the CalHEERS portal, the error returned from CalHEERS may read:

"CalHEERS cannot process the EDR. CalHEERS case is closed."

Or

"Application Status is Withdrawn, Consumer must re-apply through the CalHEERS Portal."

This leaves the Worker with no way to close the Medi-Cal program in The Systems without an EDBC Override or incorrectly using 'Inter-County Transfer' Negative Action reason to bypass the requirement to request negative action MAGI determination.

1.2 Requests

1. Add a negative action reason, "Worker Initiated-Skip CalHEERS" to the Medi-Cal program that will deny or discontinue open persons and close the program without requesting a negative action MAGI determination.
2. Add security-driven validation to limit the use of this new negative action reason to only specified users.

1.3 Overview of Recommendations

1. Update the Negative Action Detail page as follows:
 - a. Add a program-level only negative action reason, "Worker Initiated-Skip CalHEERS" to the Negative Action Reason drop-down available for the Medi-Cal program only.
 - b. Add security-driven validation to limit the use of "Worker Initiated-Skip CalHEERS" to only specified users.
 - c. Add a validation to prevent running Negative Action EDBC with "Worker Initiated-Skip CalHEERS" when the case is not linked to a CalHEERS case.
 - d. Update existing page validation "Please Request MAGI with the applicable Negative Action reason prior to running a Negative Action EDBC" trigger conditions to not include negative action reason "Worker Initiated-Skip CalHEERS."
2. Update Medi-Cal EDBC rules to close all open persons and the Medi-Cal program for the "Worker Initiated-Skip CalHEERS" Closure Reason while taking into consideration the 10-day rule.

1.4 Assumptions

1. Automated Notices of Action will not generate when a Medi-Cal Program is discontinued or denied with reason of "Worker Initiated-Skip CalHEERS ". The Worker can generate manual NOA if appropriate.
2. It is at the discretion of the Worker to reconcile case status with CalHEERS.
3. There are no updates to MEDS batches.

2 RECOMMENDATIONS

2.1 Negative Action Detail page

2.1.1 Overview

1. Update the Negative Action Detail page as follows:
 - a. Add a program-level only negative action reason "Worker Initiated-Skip CalHEERS" to the Negative Action Reason drop-down available for the Medi-Cal program only.
 - b. Add security-driven validation to limit the use of "Worker Initiated-Skip CalHEERS" to only specified users.
 - c. Add a validation to prevent running Negative Action EDBC with "Worker Initiated-Skip CalHEERS" when the case is not linked to a CalHEERS case.
 - d. Update existing page validation "Please Request MAGI with the applicable Negative Action reason prior to running a Negative Action EDBC" trigger conditions to exclude negative action reason "Worker Initiated-Skip CalHEERS."

2.1.2 Description of Changes

1. Display the negative action reason "Worker Initiated-Skip CalHEERS" in the Negative Action Reason drop-down box as shown on Figure 2.1.2.1 when all are true:
 - a. The program is Medi-Cal.
 - b. All open persons in the Medi-Cal program are selected.

Negative Action Detail

* - Indicates required fields Run EDBC

Benefit Month: *
03/2020

Medi-Cal Run EDBC for this program

<input checked="" type="checkbox"/> Person	SSN	Date of Birth
<input checked="" type="checkbox"/> Dakota Lerner	545-43-2426	08/01/1978
<input checked="" type="checkbox"/> Americana Lerner	626-04-3456	08/09/2005
<input checked="" type="checkbox"/> Montana Lerner	545-43-2424	08/15/1977

Negative Action Reason:

- Deceased
- Deemed Child - Fam ReApp
- Didn't Sign SOf
- Does Not Live in County (CMSP)
- Does Not Meet Minor Consent Requirements
- Duplicate Application
- Edwards v. Kizer (38) - Determined Ineligible for Medi-Cal Only
- Edwards v. Kizer (38) - Failure to Cooperate, Medi-Cal Only
- Failed to Complete Determination
- Failed to Complete Redetermination
- Failed to verify LTC
- Gets SSI
- Incomplete MAGI Application
- Inter-County Transfer
- Mental health
- Minor Consent
- Moved Out of County (CMSP)
- Non-Payment of Premium
- On Aid Another Case
- Requested Disc. (CMSP) - Add Person
- Requested Disc. (CMSP) - Reapply with Budget Change
- Requested Disc. (CMSP) - Verbal
- Requested Disc. - Written
- Requested Exclusion
- SSA/SSI Denied within 12 Months
- Stop Aid for Optional Member
- TMC Report Incomplete
- TMC Report Not Recvd
- User Initiated-Skip CalHEERS**
- Whereabouts Unknown

Run EDBC

Figure 2.1.2.1 – Negative Action Reason drop-down with new negative action reason available for user selection

2. Add security-driven validation to limit the use of "Worker Initiated-Skip CalHEERS" to only specified users when the "Run EDBC" button is clicked as shown in Figure 2.1.2.2
 - a. **Validation Condition:** When all are true:
 1. Negative action reason "Worker Initiated-Skip CalHEERS" selected from Negative Action Reason drop-down.
 2. The Worker has insufficient security privileges (does not have MCNegativeActionSkipMAGI security right).
 - b. **Validation Trigger:** "Run EDBC" button is clicked.
 - c. **Validation Message:** "This Negative Action Reason requires additional security privileges. Please contact your Supervisor."

Note: The page validation is a hard stop validation.

Negative Action Detail

*- Indicates required fields Run EDBC

• **Run EDBC for this program** - This Negative Action Reason requires additional security privileges. Please contact your Supervisor.

Benefit Month: *

	Medi-Cal	SSN	Date of Birth
<input checked="" type="checkbox"/>	Person		
<input checked="" type="checkbox"/>	Dacota Lerner	545-43-2426	08/01/1978
<input checked="" type="checkbox"/>	Americana Lerner	626-04-3456	08/09/2005
<input checked="" type="checkbox"/>	Montana Lerner	545-43-2424	08/15/1977

Negative Action Reason:

Run Reason:

Run EDBC

Figure 2.1.2.2 – Security-driven validation to use "Worker Initiated-Skip CalHEERS" when "Run EDBC" button is clicked

3. Add new validation to prevent running Negative Action EDBC when the case is not linked to a CalHEERS case and "Run EDBC" button is clicked as shown in Figure 2.1.2.3
 - a. **Validation Condition:** When all are true:
 1. Negative action reason "Worker Initiated-Skip CalHEERS" selected from Negative Action Reason drop-down.
 2. The Worker has sufficient security privileges (has MCNegativeActionSkipMAGI security right).
 3. The case that contains the Medi-Cal program is not linked to a CalHEERS case.
 - b. **Validation Trigger:** "Run EDBC" button is clicked.
 - c. **Validation Message:** "This Negative Action Reason is only allowed for CalHEERS-linked cases."

Note: The page validation is a hard stop validation.

Negative Action Detail

*- Indicates required fields

[Run EDBC](#)

• **Run EDBC for this program** - This Negative Action Reason is only allowed for CalHEERS-linked cases.

Benefit Month: *

11/2019

Medi-Cal		<input checked="" type="checkbox"/> Run EDBC for this program	
<input checked="" type="checkbox"/> Person	SSN	Date of Birth	
<input checked="" type="checkbox"/> Dacota Lerner	545-43-2426	08/01/1978	
<input checked="" type="checkbox"/> Americana Lerner	626-04-3456	08/09/2005	
<input checked="" type="checkbox"/> Montana Lerner	545-43-2424	08/15/1977	

Negative Action Reason:

Worker Initiated-Skip CalHEERS

Run Reason:

[Run EDBC](#)

Figure 2.1.2.3 – Validation to prevent Run EDBC when case is not linked to a CalHEERS case

4. Update existing page validation "Please Request MAGI with the applicable Negative Action reason prior to running a Negative Action EDBC" trigger condition to exclude negative action reason "Worker Initiated-Skip CalHEERS."

2.1.3 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Negative Action > Negative Action Detail

2.1.4 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MCNegativeActionSkipMAGI	Allows Negative Action EDBC on case linked to CalHEERS without requiring a Negative Action MAGI Determination	MC Negative Action Skip MAGI

2. Security Groups

Security Group	Group Description	Group to Role Mapping
MC Negative Action Skip MAGI	Allows Negative Action EDBC on case linked to CalHEERS without requiring a Negative Action MAGI Determination	None

Note: This Security Group will not be added to any Security Role; It is at the County's discretion to assign the Security Group to appropriate Staff.

2.1.5 Page Mapping

No changes

2.1.6 Page Usage/Data Volume Impacts

No changes

2.2 Medi-Cal EDBC Rules

2.2.1 Overview

Update Medi-Cal EDBC rules to close all open persons and the Medi-Cal program for the “Worker Initiated-Skip CalHEERS” Closure Reason while taking into consideration the 10-day rule.

2.2.2 Description of Changes

1. Create a Negative Action Reason (CT_73) named, “Worker Initiated-Skip CalHEERS” with the following settings:
 - a. Notice of Action: No NOA required
 - b. Medi-Cal Priority:<TBD> This reason should be the reason that closes the Program/Person.
 - c. MEDS Disc reason: 99
 - d. MEDS Deny reason: E
 - e. Program-Level closure: Yes
 - f. Person-Level closure: No
 - g. Program: Medi-Cal

Technical Note: The existing MEDS batch jobs send the Termination reason to MEDS based on the MEDS Disc reason (2.2.2.1.c) or the MEDS Deny reason (2.2.2.1.d) in the code table for the closure.

MEDS Code Descriptions

99 – Discontinued

E – Failure to Cooperate

2. Update Medi-Cal EDBC Rules to Deny/Discontinue all Medi-Cal program person(s) and close the Medi-Cal program when Negative Action Medi-Cal EDBC is run with “Worker Initiated-Skip CalHEERS” negative action reason. This applies to Full Medi-Cal Hierarchy and MAGI-only mode and takes into consideration the 10-day rule.

2.2.3 Programs Impacted

Medi-Cal

2.2.4 Performance Impacts

No change.

2.3 [Automated Regression Test] [Design in Progress]

2.3.1 Overview

[Provide an overview of the automated regression test that needs to be updated.]

2.3.2 Description of Change

1. [Provide a detailed description of what needs to be updated in the automated regression test.]
 - a. Sub point (if needed)
 - i. additional sub point (if needed)
 1. Additional sub point (if needed)
2. Next Change (if needed)

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.13	The LRS shall adhere to adverse action rules for all programs.	Negative action reason "Worker Initiated-Skip CalHEERS" added for the Medi-Cal program only. It will apply to all open persons at the same time and close the Medi-Cal program without requesting Negative Action MAGI; 10-day rule apply.