

CalSAWS

California Statewide Automated Welfare System

Design Document

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

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

Per guidance provided in ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-Modified Adjusted Gross Income (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.

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 generates through batch a Non-MAGI Screening Packet for any individual with Eligibility Evaluation Reason of 'Soft Paused' on the DER received during the Batch MAGI Renewal process. 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 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 allow 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 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 there is 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 the Run EDBC and Negative Action Detail pages that require 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.

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. 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. 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.
3. Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.
4. 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.
5. 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.
6. 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.
7. 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.
8. Add an exclusion reason to the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal Manually (RM) from the online page.
9. 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.
10. 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.

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

Run EDBC

* - Indicates required fields

Run EDBC Cancel

Benefit Month: *
10/2019

Program	Status	Timely Notice Exception	Reason	Run Reason
<input type="checkbox"/> Medi-Cal	Active			<input type="text" value="Soft Pause/Non-RE"/> TMC 176 S TMC 176 S/RE

Run EDBC Cancel

This Type 1 page took 4.07 seconds to load.

Figure 2.1.2.1 – Run EDBC Page (C-IV)

Run EDBC

* - Indicates required fields

Change Reason Run EDBC Cancel

Benefit Processing Range:
Begin Month: * End Month: *
01/2020 01/2020

Program	Status	Timely Notice Exception	Reason	Run Reason
<input type="checkbox"/> Medi-Cal	Active			<input type="text" value="Soft Pause/Non-RE"/>

Change Reason Run EDBC Cancel

Figure 2.1.2.2 – Run EDBC Page (CaSAWS)

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 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

2.1.5 Security Updates

None

2.1.6 Page Mapping

No change

2.1.7 Page Usage/Data Volume Impacts

No change

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

<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
- TMC 176 S
- TMC 176 S/RE

■ Run EDBC for this program

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

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

2.2.5 Security Updates

None

2.2.6 Page Mapping

No change

2.2.7 Page Usage/Data Volume Impacts

No change

DRAFT

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

The screenshot shows the 'Create Manual EDBC' page. At the top, there are two buttons: 'Create Manual EDBC' and 'Cancel'. Below them, there are two required fields: 'Benefit Month: *' with a dropdown menu showing '09/2019' and 'Manual EDBC Reason: *' with an empty dropdown menu. A table with the following columns is displayed: 'Program', 'Status', and 'Run Reason'. The table has one row: 'Medi-Cal' (with a checkbox), 'Active', and an open dropdown menu showing options: 'RE', 'Soft Pause/Non-RE', 'TMC 176 S', and 'TMC 176 S/RE'. At the bottom, there are two buttons: 'Create M' and 'Cancel'. A footer message states: 'This Type_1 page took 3.69 seconds to load.'

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

The screenshot shows the 'Create Manual EDBC' page. At the top, there are two buttons: 'Create Manual EDBC' and 'Cancel'. Below them, there are two required fields: 'Benefit Month: *' with a dropdown menu showing '01/2020' and 'Manual EDBC Reason: *' with an empty dropdown menu. A table with the following columns is displayed: 'Program', 'Status', and 'Run Reason'. The table has one row: 'Medi-Cal' (with a checkbox), 'Active', and an open dropdown menu showing options: 'RE' and 'Soft Pause/Non-RE'. At the bottom, there are two buttons: 'Create Manual EDBC' and 'Cancel'. A footer message states: 'This Type_1 page took 0.33 seconds to load.'

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

2.3.5 Security Updates

None

2.3.6 Page Mapping

No change

2.3.7 Page Usage/Data Volume Impacts

No change

DRAFT

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 interface. At the top, a notification message is displayed: "• EDBC was run with Soft Pause/Non-RE Run Reason and RE was not advanced." Below this, the page title "EDBC List" is visible. The interface includes a "Cancel" button in the top right corner. Under the "Display by:" section, there are fields for "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, a "Search Results Summary" section shows "Results 1 - 2 of 2". A table with the following columns is displayed: "Begin Month", "End Month", "Program", "Type", "Run Status", "Auth Amount", "Date Run", and "EDBC Source". The table contains two rows of data:

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

At the bottom of the page, there is a "Cancel" button and a status message: "This Type_1 page took 1.31 seconds to load."

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. (See section 2.5.2.3 for auto-set EDBC Run Reason criteria.)
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

2.4.5 Security Updates

None

2.4.6 Page Mapping

No change

2.4.7 Page Usage/Data Volume Impacts

No change

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. EDBC will not advance the RE Due Date 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 Non-MAGI Medi-Cal 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 Mixed MAGI/Non-MAGI Medi-Cal 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:

C-IV Medi-Cal RE Packets

- MAGI RE Packet
- Aged, Blind, Disabled (ABD) Medi-Cal Redetermination Packet
- MAGI and Non-MAGI Redetermination Packet
- Regular Medi-Cal/ ABD RE Packet (Signature packet)
- Regular Medi-Cal Redetermination Packet
- LTC Mixed Household RE Packet (Signature Packet)
- LTC RE Packet (Signature Packet)

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- Long Term Care (LTC) Medi-Cal Redetermination Packet
- Non-MAGI Long Term Care (LTC) Mixed Household Redetermination packet
- Non-MAGI Turning 65 Packet
- 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.)

CalSAWS Medi-Cal RE Packets

- ABD MC RE Packet
- MAGI MC Packet
- Mixed MC RE Packet
- LTC MC RE Packet
- MC 604 IPS Packet
- MC RE Packet
- 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

2.5.3 Programs Impacted

Medi-Cal

2.5.4 Performance Impacts

No change

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.

2.6.3 Interface Partner

CalHEERS

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	<i>Soft Paused</i>
Long Decode Name	<i>Soft Paused</i>
Begin date	<i>Default System Min Date / 01-JAN-00 00:00:00</i>
End date	<i>Default System High Date /31-DEC-99 00:00:00</i>

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.

2.7.3 Execution Frequency

No change

2.7.4 Key Scheduling Dependencies

No change

2.7.5 Counties Impacted

CalSAWS

2.7.6 Data Volume/Performance

[Provide the anticipated number of records created/processed and the impact on performance.]

2.7.7 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.)

2.8 Batch MAGI Renewal Sweep (CalSAWS only) [Design in Progress]

2.8.1 Overview

Add an exclusion reason to the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal Manually (RM) from the online page.

2.8.2 Description of Change

1. Update Batch MAGI Renewal Sweep (PB00CH203) to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal Manually (RM) from the online page.

2.8.3 Execution Frequency

No change

2.8.4 Key Scheduling Dependencies

No change

2.8.5 Counties Impacted

CalSAWS counties

2.8.6 Data Volume/Performance

[Provide the anticipated number of records created/processed and the impact on performance.]

2.8.7 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 Generate Non-MAGI Screening Packet

2.9.1 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. Update the batch to send the packet based on the Skip from Batch EDBC.

2.9.2 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" between the last success date and batch date.
 Note: Record exists in BATCH_ELIG_NOT_PROC table with NOT_PROC_RSN_CODE of SP.
 - b. Any of the following packets does not exist for the same effective month.

C-IV	CalSAWS
Non-MAGI Screening Packet	Non-MAGI Screening Packet
Mixed MC RE Packet	MC 604 IPS PACKET
Non-MAGI Turning 65 Packet	Non-MAGI Turning 65 Packet

Note for CIV: The batch job currently checks if the Non-MAGI Screening Packet or Mixed MC RE Packet exist for the same effective month. With this SCR it is being updated to also check for Non-MAGI Turning 65 Packet

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: First day of the following month from the batch run

date

Example: If the batch is run on 05/04/2019, the effective date will be 06/01/2019

Note for C-IV: The batch job currently populates the effective date as the first day of 2 months following the batch run date. With this SCR, this is updated to populate the effective date as first day of the following month from the batch run date.

Example: If the batch is run on 05/04/2019, the effective date currently being populated is 07/01/2019. It is being updated to populate the effective date as 06/01/2019.

- 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.

2.9.3 Variable Population

Variable population through batch will be similar to the variable population when the packet is generated from Template Repository.

2.9.4 Execution Frequency

Daily

2.9.5 Key Scheduling Dependencies

Prior to forms processing

2.9.6 Counties Impacted

All Counties

2.9.7 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.)

2.10 MAGI Emulator

2.10.1 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.

2.10.2 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).

2.11 Automated Regression Test

2.11.1 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.

2.11.2 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.

2.12 Regression Test the DHCS Renewals Master Request Report (CalSAWS Only)

2.12.1 Overview




The DHCS Renewals Master Request report provides counts on: Medi-Cal renewals, Medi-Cal renewals processing, and Medi-Cal continuance and discontinuance as a result of renewal processing. There are two versions of the report in the system. A form that is sent to the State directly and a version that is available to counties. The county version offers a detail sheet with case level information.

2.12.2 Description of Change

1. Regression test the DHCS Renewals Master Request Report to ensure that the report will collect information pertaining to the MAGI – Completed & Resulted in Continued Medi-Cal – Manual Ex-Parte when an EDR is sent using the following run reason code.

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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_08-01-2019
3	Client Correspondence	FDD for Non-MAGI Screening Packet	 FD_FRM_NonMAGI ScreeningPacket.docx

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