

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

**CA-50800**

CalWORKs Denial NOA –  
Correct the 30-day date inserted on the NOA

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/11/19	1.0	Initial Creation	Connor Gorry
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# 1 OVERVIEW

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Per CW Regulation 40-126.342, when an applicant receives a CalWORKs denial due to a failure to provide verification of eligibility, their eligibility may be re-examined if they provide the necessary verification. Per the regulation, the applicant has a 30-day window to provide additional proof of eligibility, after which cash aid may be granted.

## 1.1 Current Design

Under the current design, the Denial NOAs are generating with the incorrect date, giving the participant less than the Thirty Days required by regulation 40-126.342.

**For Example:** Currently, a participant applies for CalWORKs on July 1<sup>st</sup>, but because they haven't provided the required verification their application is denied by a Case Worker on July 16<sup>th</sup>. The notice will populate with July 31<sup>st</sup>, instead of the required 30-day calculation based on when the worker took action. Rather than July 31<sup>st</sup>, the date should be August 15<sup>th</sup>.

Current logic does not give the applicant the required thirty days to provide the needed verification. This SCR will correct the Thirty Day Denial to give the participant thirty days from when the worker processes the Denial.

## 1.2 Requests

This SCR is to correct the 30-day date insertion in the CalWORKs Denial NOA in CalSAWS.

## 1.3 Overview of Recommendations

### 1.3.1 Correct 30-Day Date inserted in Fragment 6135 (A216D)

Change the population of the due-date variable in the XDP and code logic for Fragment CW\_DN\_PAY\_MNTH\_INC\_PRF\_NOT\_SUB\_A216\_EN.xdp

### 1.3.2 Suppress Fragment 6157 (A650D)

Change the population of the due-date variable in the XDP and code logic for Fragment CW\_DN\_NHR\_CMPL\_FAIL\_A650\_EN.xdp

NOA Reason Fragment 6157 is no longer in use in LRS. This change will suppress NOA Fragmen with snippet\_id = 6157.

### 1.3.3 Suppress Fragment 6159 (A676D)

Change the population of the due-date variable in the XDP and code logic for Fragment CW\_DN\_UNRPTD\_INC\_INFO\_NON\_SUB\_A676\_EN.xdp

NOA Reason Fragment 6159 is no longer in use in LRS. This change will suppress NOA Fragmen with snippet\_id = 6159.

#### **1.4 Assumptions**

1. As this is a dynamic change, no verbiage will be altered, and no additional translations will be added or removed.
2. All other NOA logic will remain the same.



# 1 RECOMMENDATIONS

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This SCR will change the logic of the date insertion element of **a** Fragment relating to the CalWORKs Denial NOA from 30 days from the initial application date to 30 days from the EDBC run date. This will effectively ensure that the customer always has thirty days from the generation of the Denial Notice – however long after their initial application date that may be – to submit any additional verification.

Denial Fragment CW\_DN\_NHR\_CMPL\_FAIL (ID: 6157) and Denial Fragment CW\_DN\_UNRPTD\_INC\_INFO\_NON\_SUB (ID:6159) will be suppressed as a part of this change, as they are no longer in use in LRS/CalSAWS. Fragment CW\_DN\_NOPRF\_NON\_CTZN (ID: 6160) already uses this logic.

## 1.1 Correct the Thirty Day Date inserted in Fragment CW\_DN\_PAY\_MNTH\_INC\_PRF\_NOT\_SUB

### Reason Fragment Name and ID:

CW\_DN\_PAY\_MNTH\_INC\_PRF\_NOT\_SUB\_A216\_EN.xdp  
Fragment ID: 6135

**State Form/NOA:** NA 290

**Current NOA Template:** NOA\_290\_V004

**Current Program(s):** CW

**Current Action Type:** Denial

**Current Fragment Level:** Program

**Currently Repeatable:** No

**Include NA Back 9:** Yes

**Current Forms/NOAs Generated with this NOA:** None

**Existing Languages:** Armenian, Cambodian, Chinese, English, Korean, Russian, Spanish, Tagalog, Vietnamese

### 1.1.1 Add/Update Fragment Variable Population

Add the correct variable for the A216D Income Not Verified fragment.

Variable Name	Population	Formatting*
<Due_Date>	Populate by adding thirty days to the EDBC run date.	Arial, Size 10 mm/dd/yyyy

**Variables Requiring Translations:** N/A (See [Assumption #2](#))

## 1.2 Suppress Fragment CW\_DN\_NHR\_CMPL\_FAIL

### Reason Fragment Name and ID:

CW\_DN\_NHR\_CMPL\_FAIL\_A650\_EN.xdp

Fragment ID: 6157

**State Form/NOA:** NA 290

**Current NOA Template:** M40-171A\_V002

**Current Program(s):** CW

**Current Action Type:** Denial

**Current Fragment Level:** Program

**Currently Repeatable:** No

**Include NA Back 9:** Yes

**Current Forms/NOAs Generated with this NOA:** None

**Existing Languages:** Armenian, Cambodian, Chinese, English, Korean, Russian, Spanish, Tagalog, Vietnamese

### 1.2.1 Suppress Fragment CW\_DN\_NHR\_CMPL\_FAIL

Fragment CW\_DN\_NHR\_CMPL\_FAIL is no longer generated in LRS because Eligibility does not deny for the reason "Failed to Comply with IFDS". Only Discontinuance is possible for this reason.

This recommendation is to suppress this NOA, as it no longer generates in LRS/CalSAWS.

## 1.3 Suppress Fragment CW\_DN\_UNRPTD\_INC\_INFO\_NON\_SUB

### Reason Fragment Name and ID:

CW\_DN\_UNRPTD\_INC\_INFO\_NON\_SUB\_A676\_EN.xdp

Fragment ID: 6159

**State Form/NOA:** NA 290  
**Current NOA Template:** M40-171A\_V002  
**Current Program(s):** CW  
**Current Action Type:** Denial  
**Current Fragment Level:** Program  
**Currently Repeatable:** No

**Include NA Back 9:** Yes

**Current Forms/NOAs Generated with this NOA:** None

**Existing Languages:** Armenian, Cambodian, Chinese, English, Korean, Russian, Spanish, Tagalog, Vietnamese

### 1.3.1 Suppress Fragment CW\_DN\_UNRPTD\_INC\_INFO\_NON\_SUB

Fragment CW\_DN\_UNRPTD\_INC\_INFO\_NON\_SUB generates for the reason "Form PA2492 not received"; However, because this form is not controlled, and this reason is no longer valid, a case will not be denied if PA 2492 is not returned.

This recommendation is to suppress this NOA, as a Denial NOA is no longer generated for this reason in LRS/CalSAWS.

## 2 SUPPORTING DOCUMENTS

Ref #	Document	Functional Area	Description	Attachment
1	CalWORKs Denial NOA	CW	<p>The complete CalWORKs Denial NOA with incorrect date generation.</p> <p>Using this test case as an example, you can see that the deadline for additional proof is set to July 3<sup>rd</sup>, even though this NOA was sent on August 6<sup>th</sup>, over a month later.</p>	 CW Denial NOA (Test Use)

### 3 REQUIREMENTS

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#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1245	The [CalSAWS] shall control the timely notice of adverse action.	This SCR ensures that applicants be given the proper amount of time to respond to an adverse action – in this case being denial of assistance.
CAR-1205	<p>The LRS shall produce the NOA in a timely manner, in accordance with Turner waiver requirements, containing the following:</p> <p>...</p> <p><b>c. The effective date of the proposed action(s);</b></p> <p>d. The reason(s) for the proposed action(s);</p> <p>e. Time periods covered, including retroactive periods</p> <p>...</p> <p>k. Instructions regarding the filing of an appeal and appeals-specific contact information;</p> <p>l. Date and time of notification;</p>	<p>This change is relates to several of the Turner waiver requirements, which mandate that [CalSAWS] forms be concise and accurate.</p> <p>Perhaps most relevant among these requirements is that this form accurately defines “The effective date of the proposed actions(s)”, which it does not do – or, at least not accurately – in its current iteration.</p>

### 4 MIGRATION IMPACTS

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N/A

### 5 OUTREACH

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N/A

## 6 APPENDIX

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### 6.1 CW Denial Fragments with Thirty Day Date Variable Population

Affected Fragment #1	
<b>Fragment Name</b>	CW_DN_PAY_MNTH_INC_PRF_NOT_SUB_A216_EN.xdp
<b>Snippet/Reason ID</b>	6135
<b>Business/Trigger Conditions Description</b>	Trigger at application when case is deny due to the Pay Month Earned Income was not verified.
<b>Variable Population</b>	'ThirtyDaysAfterApplication'
<b>Fragment Text</b>	<p>You must give us facts and proof we need and do other things we need you to do, as best as you can.</p> <p>You did not provide verification of your earnings.</p> <p>If you are having problems getting the proof we need, call the County and we can help you try to get it. If you do what we ask and give us the proof and facts we need before &lt;ThirtyDaysAfterApplication&gt;, we will take another look at your application.</p>
<b>Existing Languages</b>	Armenian, Cambodian, Chinese, English, Korean, Russian, Spanish, Togalog, Vietnamese
<b>Additional Info</b>	<a href="#">A216D SPD Document</a>

Affected Fragment #2	
<b>Fragment Name</b>	CW_DN_NHR_CMPL_FAIL_A650_EN.xdp
<b>Snippet/Reason ID</b>	6157
<b>Business/Trigger Conditions Description</b>	<p>Trigger for CalWORKs cases when applicant(s) failed or refused to provide requested IEVS/IFDS/NHR related information and aid is denied.</p> <p>The refusal or failure to provide information could have happened at re-application. When IEVS/IFDS/NHR data was previously requested and not provided or during the intake process while case is still pending.</p> <p>Note: NOA Row ID 1975 and 1976 will not be triggered in conjunction with this NOA reason code.</p>
<b>Variable Population</b>	'ThirtyDaysAfterApplication'
<b>Fragment Text</b>	<p>You must give us facts and proof we need and do the other things we need you to do, as best as you can. You did not provide information regarding unreported income (IEVS).</p> <p>If you are having problems getting the proof we need, call the County and we can help you try to get it. If you do what we ask and give us the proof and facts we need before &lt;ThirtyDaysAfterApplication&gt;, we will take another look at your application.</p>
<b>Existing Languages</b>	Armenian, Cambodian, Chinese, English, Korean, Russian, Spanish, Togalog, Vietnamese
<b>Additional Info</b>	<a href="#">A650 SPD Document</a>

Affected Fragment #3	
<b>Fragment Name</b>	CW_DN_UNRPTD_INC_INFO_NON_SUB_A676_EN.xdp
<b>Snippet/Reason ID</b>	6159
<b>Business/Trigger Conditions Description</b>	<p>Trigger for CalWORKs/RCA cases when the participant(s) failed to or refused to provide the requested PVS related information and aid is denied.</p> <p>The refusal or failure to provide information could have happened at re-application. When PVS data was previously requested and not provided or during the intake process while the case is still pending.</p> <p>(This NOA will not combine with the NHR or IFDS NOAs).</p>
<b>Variable Population</b>	'LastDateToProvideInfo' *
<b>Fragment Text</b>	<p>You must give us facts and proof we need and do the other things we need you to do, as best as you can. You did not provide information regarding unreported income (IEVS).</p> <p>If you are having problems getting the proof we need, call the County and we can help you try to get it.</p> <p>If you do what we ask and give us the proof and facts we need or ask the County for help before &lt;LastDateToProvideInfo&gt;, we will take another look at your application.</p>
<b>Existing Languages</b>	Armenian, Cambodian, Chinese, English, Korean, Russian, Spanish, Tagalog, Vietnamese
<b>Additional Info</b>	<a href="#">A676D SPD Document</a>

\*LastDateToProvideInfo uses the same Java method as ThirtyDaysAfterApplication

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-59071 – DDCR 3155: CalACES - MPP 42-763.711- Do  
Not Open or Reopen Cal-Learn For a Person With a  
CHSPE or HiSET Degree

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dan DeMille
	Reviewed By	Jason Francis

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/22/2019	1.0	Initial Draft	Dan DeMille
08/13/2019	1.1	Updated on Batch requirements	Howard Suksanti
08/19/2019	1.2	Add Service Arrangement Detail page requirements	Eric Wu
08/21/2019	1.3	Added Reports Recommendation	Justin Dobbs
8/28/2019	1.4	Added Online Recommendation	Lawrence Garber
9/26/2019	1.5	Added GR batch Recommendation	Howard Suksanti
9/27/2019	1.6	Updated Batch section based on the review comments	Howard Suksanti
10/3/2019	1.7	Updated Batch section based on the review comments	Howard Suksanti
10/22/2019	1.8	Added assumption on the task	Howard Suksanti
11/22/2019	1.9	Updates based on committee feedback	Josias Caveto
12/04/2019	2.0	Updates based on the committee responses	Josias Caveto
02/13/2019	2.1	Updated the Mock up to mention HiSET instead of HSET	Nithya Chereddy

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## 1. OVERVIEW

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The current CalWORKs EDBC logic identifies the Degree Type for GED or High School Diploma as exemptions for the mandatory Cal-Learn program.

When the CalWORKs EDBC runs and the Degree Type selected is CHSPE (California High School Proficiency Exam), the current EDBC logic does not identify CHSPE as an exemption from mandatory Cal-Learn program, as it does for GED or High School Diploma. Currently there is no degree type of HiSET (High School Equivalency Test); an HiSET degree type should be added and should also be identified as an exemption from a mandatory Cal-Learn program.

By changing the CalWORKs EDBC logic to suppress the mandatory Cal-Learn program for CHSPE and HiSET, this will make CalSAWS compliant with the Cal-Learn participation requirements for MPP 42-763.711.

### 1.1. Current Design

CalSAWS opens a Cal-Learn program for a CalWORKs (CW) pregnant teen or a teen parent with a CHSPE degree, whereas C-IV does not. If a CHSPE degree is added for a CalWORKs (CW) pregnant teen or a teen parent and EDBC is run, the Cal-Learn program does not close because EDBC does not identify CHSPE as an exemption for the program. In addition, an HiSET is not available in the Degrees License Detail page and so is not able to be considered.

The Cal-Learn discontinuance batch job does not identify CHSPE as an exemption and therefore the Cal-Learn program remains open for the Cal-Learn participant.

Other system reports that measure activity of the Cal-Learn program are not considering CHSPE or HiSET as a High School equivalent as it does for GED and providing inaccurate reporting results.

### 1.2 Requests

1. Add an HiSET (High School Equivalency Test) program as a Degree Type
2. Do not open or reopen Cal-Learn for a CW pregnant teen or a teen parent with a CHSPE or HiSET degree. Modify the existing Cal-Learn (CL) Discontinuance batch to discontinue the CL program when a CL participant receives a CHSPE or HiSET degree. Update reports that use HS Diploma and GED as a form of graduation.

### 1.3 Overview of Recommendations

- Add an HiSET (High School Equivalency Test) program as a Degree Type

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- The mandatory Cal-Learn requirement check must not make Cal-Learn a mandatory program for a CW pregnant teen or a teen parent with a CHSPE or HiSET degree when the user runs the CalWORKs EDBC. CHSPE and HiSET will have the same Cal-Learn exemption as the GED or HS Diploma
- Update EDBC to include CHSPE and HiSET for CW (Non Cal-Learn) Cash Aid and Pregnancy Special Need with No Other Eligible Child (SCR 12551)
- Modify Cal-Learn Discontinuance Sweep batch (PB00E903) to include CHSPE and HiSET into the batch trigger conditions.
- Modify GR Employability Status Change Sweep batch (PB19E481) to remove the school degree trigger conditions.
- Update Service Arrangement Detail page to check for an HiSET, CHSPE, GED, or HS Diploma when Cal-Learn Graduation bonus is entered.
- Update Cal-Learn Progress Detail page to check for an HiSET, CHSPE, GED, or HS Diploma when Cal-Learn Graduation bonus is entered.
- Update the Cal-Learn Program Administration Reports to include CL participants with a CHSPE or HiSET degree.

#### 1.4 Assumptions

- CHSPE already exists as a Degree Type on the Degree License Detail page in CalSAWS.
- The CalWORKs EDBC logic will be modified in CalSAWS only.
- The mandatory Cal-Learn requirement check in EDBC will use the same qualification logic for a CW pregnant teen or a teen parent with a CHSPE or HiSET degree as it does for a participant with a GED or High School Diploma.
- This SCR will only affect the logic going forward. There is no effort to update historical Cal-Learn programs.
- The change to the CalWORKs EDBC logic will apply to both online and batch EDBC.
- The existing discontinuance reason of 'Earned HS diploma or equivalent' will be used for CHSPE or HiSET discontinuances. The result is no impact to the STAT 45 report.
- Fields not mentioned to be modified within the description of changes will retain their current functionality.
- There will be no change on the existing task that is trigger when the CL Program status gets "Discontinued" with its status reason "Earned HS diploma or equivalent".
- HiSET Degree Type does not exist in CALSAWS or C-IV

## 2. RECOMMENDATIONS

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### 2.1 Add HiSET as a Type option on the Degrees License Detail page

#### 2.1.1 Overview

The Degrees License Detail page allows users to enter credentials earned by the participant. Currently HiSET (High School Equivalency Test) is not a Type option.

HiSET will be added to the 'TYPE' dropdown on the Degrees License Detail page.

#### 2.1.2 Description of Changes

1. Add HiSET to the 'Type' dropdown on the Degrees License Detail page.

#### 2.1.3 Page Location

**Global: Empl. Services**

**Local: Case Summary**

**Task: Degrees Licenses**

#### 2.1.4 Counties Impacted

All

#### 2.1.5 Security Updates

No Change

#### 2.1.6 Page Mapping

No Change

### 2.2 Update EDBC to Make CHSPE & HiSET Exempt from Mandatory Cal-Learn Program

#### 2.2.1 Overview

If the CW pregnant teen or a teen parent is a person with a CHSPE or HiSET degree, do not open or re-open a Cal-Learn program and discontinue a Cal-Learn program, when the user runs the CalWORKs EDBC.

The mandatory Cal-Learn requirement check must not make Cal-Learn a mandatory program for an CW pregnant teen or a teen parent with a CHSPE or HiSET degree, when all other criteria are met. Similar function as GED or High School Diploma.

### 2.2.2 Description of Changes

The CalWORKs EDBC logic will be modified in CalSAWS to include CHSPE and HiSET degree as an exemption for the mandatory Cal-Learn program. Do not open or re-open a mandatory Cal-Learn program if CHSPE or HiSET degree is added and discontinue an existing mandatory Cal-Learn program if a CHSPE or HiSET degree is added for the CW pregnant teen or a teen parent. Apply the same logic as GED and High School Diploma.

### 2.2.3 Programs Impacted

CalWORKs

Cal-Learn

### 2.2.4 Performance Impacts

N/A

## 2.3 Update EDBC to Include CHSPE & HiSET for CalWORKs (Non Cal-Learn) Cash Aid and Pregnancy Special Need with No Other Eligible Child

### 2.3.1 Overview

The current CalWORKs logic aids an eligible participant for benefits if they have a high school diploma or GED and pregnancy special needs in the below two scenarios:

- If Pregnant Teen 18 years old or younger and have completed high school diploma or equivalent and they are without other children in the home or
- If the pregnant teen is less than 19 years and is eligible for Cal-Learn

Once a pregnant teen 18 years old or younger becomes eligible, they remain eligible based on the pregnancy until they become financially ineligible or the pregnancy ends. This is true even if the pregnant teen reaches her 18th birthday prior to her third trimester.

The CHSPE and HiSET degree needs to be considered the same as GED or a high school diploma in this scenario.

### 2.3.2 Description of Changes

The CalWORKs EDBC logic will be modified in CalSAWS to include CHSPE & HiSET as a valid degree for high school equivalent to provide CalWORKs eligibility and pregnancy special needs.

### 2.3.3 Programs Impacted

CalWORKs

### 2.3.4 Performance Impacts

N/A

2.4 Modify the Cal-Learn Discontinuance Sweep batch (PB00E903) to include CHSPE & HiSET into the trigger conditions.

#### 2.4.1 Overview

The Cal-Learn Discontinuance Sweep batch discontinues CL programs for Cal-Learn participant turning 19 years old or when the Cal-Learn participant receives a degree of type 'High School Diploma' or 'GED'.

#### 2.4.2 Description of Change

Add an additional trigger condition to batch job PB00E903 to trigger Batch EDBC on programs when the CL participant receives a CHSPE or HiSET degree in the same manner as when a High School Diploma or GED is received. The job will trigger Batch EDBC when all the following additional triggers conditions are met.

##### Additional trigger conditions:

1. The Participant is Active in CL program as of the come-up month.
2. The Participant has a CHSPE or HiSET degree in which the Degree Received date is before or on the same day as the batch run date.

#### 2.4.3 Execution Frequency

No change. Monthly Batch 10-day cutoff.

#### 2.4.4 Key Scheduling Dependencies

No change.

#### 2.4.5 Counties Impacted

All Counties.

Per DDID 1789 - All Non-County-specific Batch jobs that exist in LRS will run for all 58 Counties, unless otherwise specified in other DDIDs to be County configurable.

## 2.4.6 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.)

## 2.5 Modify the 'GR Employability Status Change Sweep' batch job (PB19E481) to remove the HS Diploma and GED degree type received trigger conditions.

### 2.5.1 Overview

The 'GR Employability Status Change Sweep' batch triggers Batch EDBC when:

- 1) A GR Participant's Work Registration status is 'Employable' and,
  - a. is under 19 and the grad date is in the future, OR
  - b. has a verified pregnancy record exists and the pregnancy is future-dated, OR
  - c. has a citizenship record with types (T-Visa with section code as Filed Application or Denied - Filed USCIS appeal or U-Visa with section code as Filed application or Denied - Filed USCIS appeal), OR
  - d. is between 14 and 18 years old and there is an emancipated date before or on the batch date
- 2) GR Participant's WR Status is Admin-U, and 18 years old and the graduation date is on or before the batch date.

The Batch Sweep logic considers both school attendance end date records prior to the batch date as well as H.S. Diploma and GED degree types received prior to the batch date as evidence of graduation. However, GR EDBC logic does not consider the degree type that was received. As a result, when participants are picked up by batch due to receiving a H.S. Diploma or GED will not be updated by EDBC, since EDBC does not consider the degree type.

Therefore, as part of this SCR, the batch trigger conditions will be updated to not consider the degree type that was received to match the current GR EDBC logic.

### 2.5.2 Description of Change

Remove school degree trigger conditions from PB19E481 batch that triggers when participant has received a degree type of 'High School Diploma' or 'GED'.

### 2.5.3 Execution Frequency

No change. Daily.

### 2.5.4 Key Scheduling Dependencies

No change.

## 2.5.5 Counties Impacted

Los Angeles County.

## 2.5.6 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.)

## 2.6 Service Arrangement Detail page

### 2.6.1 Overview

The current Service Arrangement Detail page only allows the Cal-Learn Graduation bonus if the CL participant has a High School Diploma or GED. This page will be updated to include CHSPE and HiSET as a high school degree equivalent.

### Service Arrangement Detail

[Save and Return](#) [Cancel](#)

---

- **Form Error** - To select "Graduation", the person should have a High School Diploma, GED, CHSPE or HiSET.

Need 🗨️			
Type	Name	Category	Begin Date
<input checked="" type="radio"/> <a href="#">Graduation Bonus</a>	Jane Doe	CalLearn Bonus	11/21/2019
<input type="radio"/> <a href="#">Diaper Allowance</a>	Jane Doe	Other Supportive Services	06/21/2018

Figure 2.4.3 – Service Arrangement Detail Page Create Mode

### 2.6.2 Description of Changes

Update the validation message which displays 'To select "Graduation", the person should have a GED, or High School Diploma' to be 'To select "Graduation", the person should have a High School Diploma, GED, CHSPE, or HiSET. This validation message will display when the need type is 'Graduation Bonus' and the participant does not have any of the following degrees:

- High School Diploma
- GED
- CHSPE
- HiSET

### 2.6.3 Page Location

No Change

### 2.6.4 Counties Impacted

Los Angeles County

### 2.6.5 Security Updates

No Change

### 2.6.6 Page Mapping

No Change

## 2.7 Cal-Learn Progress Detail page

### 2.7.1 Overview

The current Cal-Learn Progress Detail page collects data about the Cal-Learn participant progress and determines eligibility for bonuses. This page will be updated to include CHSPE and HiSET as a high school degree equivalent.

### 2.7.2 Cal-Learn Progress Detail page mock up

## Cal-Learn Progress Detail

\*- Indicates required fields

Save and Return

Cancel

- **Bonus Type** - To select "Graduation", the person should have a High School Diploma, GED, CHSPE, or HiSET.

<b>Name: *</b> Jane Smith ▼	<b>Cal-Learn 90 Day:</b> No	
<b>Begin Date: *</b> 08/20/2019	<b>End Date:</b> 12/20/2019	
<b>Report Due Date: *</b> 01/10/2020	<b>Date Reported to AFLP:</b> 	<b>Date Reported to Cal-Learn County Worker:</b> 
<b>GPA:</b> 2		
<b>Progress Status:</b> Satisfactory Bonus ▼	<b>Bonus Type: *</b> Graduation Bonus ▼	

Cal-Learn Bonus		
Bonus Type	Service Status	Status Date

Save and Return      Cancel

Figure 2.5.3 –Cal-Learn Progress Detail page

### 2.7.3 Description of Changes

Update the validation message which displays "To select "Graduation", the person should have a GED, or High School Diploma" to be "To select "Graduation", the person should have a High School Diploma, GED, CHSPE, or HiSET. This validation message will display when the Bonus Type is 'Graduation Bonus' and the participant does not have any of the following degrees:

- High School Diploma
- GED
- CHSPE
- HiSET

### 2.7.4 Page Location

No Change

### 2.7.5 Security Updates

No Change

## 2.7.6 Page Mapping

No Change

## 2.7.7 Page Usage/Data Volume Impacts

No Change

## 2.8 Skills Search Detail page

### 2.8.1 Overview

The current Skills Search Detail page allows users to search skills using various fields. The page will be updated to include CHSPE and HiSET as a high school degree equivalent.

## 2.8.2 Skills Search Detail page mock up

### Skills Search

\* - Indicates required fields

Search

Search By: Worker ID: \*

Worker ID:  Select

Customer Address:

City:

Does the customer need a HS diploma, GED, CHSPE or HiSET? No

Does the customer need a valid ID? No

Does the customer need a driver's license? No

Language: All

Skills:

Add or remove skills for this search.

Category	Type	Experience	
<input type="checkbox"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	Add

Remove

Results per Page: 25 Search

Figure 2.4.3 – Skills Search Detail Page

### 2.8.3 Description of Changes

Update the dropdown field label, which currently asks “Does the customer need a GED/HS diploma?” to “Does the customer need a HS diploma, GED, CHSPE, or HiSET ”

### 2.8.4 Page Location

No Change

### 2.8.5 Security Updates

No Change

### 2.8.6 Page Mapping

Page mapping for dropdown field “Does the customer need a GED/HS Diploma” will be updated to “Does the customer need a HS diploma, GED, CHSPE, or HiSET ”.

## 2.8.7 Page Usage/Data Volume Impacts

No Change

## 2.9 Job Order Detail page

### 2.9.1 Overview

The current Job Order Detail page collects data about Job Orders. This page will be updated to include CHSPE and HiSET as a high school degree equivalent.

### 2.9.2 Job Order Detail page mock up

## Job Order Detail

\* - Indicates required fields

Save Save and Continue Save and Copy Cancel

### Basic Information

Job Order Category: *	Post Date: *	Expiration Date: *
<input type="text" value="- Select -"/>	11/22/2019	12/06/2019
Number of Positions: *	Status: *	Job Order ID:
<input type="text" value="1"/>	<input type="text" value="Open"/>	
Worker Id: *	Contact Person Name:	
<input type="text" value="Select"/>	<input type="text"/>	

### Job Information

Job Title: *	Job Location, if different from Employer:	
<input type="text"/>	<input type="text"/>	
Comments: *		
<input type="text"/>		
Hourly Wage: *	Number of Hours: *	Frequency: *
<input type="text"/>	<input type="text"/>	<input type="text" value="Weekly"/>
Can Hourly Wage increase based on experience?	<input type="text" value="No"/>	
Does this job have benefits?	<input type="text" value="No"/>	

### Requirements

Does the applicant need a HS diploma, GED, CHSPE or HiSET? *	<input type="text" value="No"/>
Does this job require a background search? *	<input type="text" value="No"/>
Does this job require a drug screen? *	<input type="text" value="No"/>
What type of driver's license is required? *	<input type="text" value="None"/>

Save Save and Continue Save and Copy Cancel

Figure 2.4.3 – Job Order Detail Page

### 2.9.2 Description of Changes

Update "Does the applicant need a GED/HS diploma?" dropdown field label to " Does the applicant need a HS diploma, GED, CHSPE, or HiSET?"

### 2.9.3 Page Location

No Change

## 2.9.4 Security Updates

No Change

## 2.9.5 Page Mapping

Page mapping for dropdown field “Does the customer need a GED/HS Diploma” will be updated to “Does the applicant need a HS diploma, GED, CHSPE, or HiSET?”.

## 2.9.6 Page Usage/Data Volume Impacts

No Change

# 2.10 Update Cal-Learn Program Administration Reports

## 2.10.1 Overview

The Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report is a monthly scheduled report that provides counts by provider for Performance Measures, Supportive Services, Bonuses and Sanctions. This report is used by Contracts Management Section III and Program staff in Los Angeles county.

## 2.10.2 Summary Worksheet

 <b>Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions</b>						
<b>Los Angeles</b>						
Run Date: AUG-01-19 11:23 PM						
Report Month: 07/2019						
Summary of Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions by Cal-Learn Provider						
Cumulative Data From Date:	03/01/2019					
Cumulative Data To Date:	07/31/2019					
Performance Measures	EL NIDO FAMILY CENTER	FOOTHILL FAMILY SERV	CHLA PROJECT NATEEN	ALTAMED HOME BASE	Total	
Participants Scheduled for Orientation	0	0	0	0	0	
Participants Who Completed Orientation in the Review Period	0	0	0	0	0	
<b>Orientation Completion Rate</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	
Participants Who Completed Orientation	0	0	0	0	0	
Participants Who Were Enrolled in School	0	0	0	0	0	
<b>School Enrollment Rate</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	
Participants with a Report Card Due in Review Period	0	0	0	0	0	
Participants who Submitted a Report Card	0	0	0	0	0	
<b>Report Card Submission Rate</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	
Participants Who Completed at Least the 11th Grade and Left the Program	0	0	0	0	0	
Participants who Received a GED/High School Diploma	0	0	0	0	0	
<b>GED/High School Graduation Rate</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	
Receiving Supportive Services	EL NIDO FAMILY CENTER	FOOTHILL FAMILY SERV	CHLA PROJECT NATEEN	ALTAMED HOME BASE	Total	
Child Care	0	0	0	0	0	
Transportation	0	0	0	0	0	
Ancillary Services	0	0	0	0	0	
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
Bonuses and Sanctions	EL NIDO FAMILY CENTER	FOOTHILL FAMILY SERV	CHLA PROJECT NATEEN	ALTAMED HOME BASE	Total	
Received a Bonus in the Review Period	0	0	0	0	0	
Report Card Showed Satisfactory Progress	0	0	0	0	0	
High School Diploma Earned or Equivalent	0	0	0	0	0	
Received a Sanction in the Review Period	0	0	0	0	0	
Report Card Showed Less Than Adequate Progress	0	0	0	0	0	
Report Card Was Not Submitted	0	0	0	0	0	
Submitting a Late Report Card Without Good Cause	0	0	0	0	0	
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	

Figure 2.5.1 – Summary worksheet

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### 2.10.3 Performance Measures Worksheet

 <b>Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions</b>										
Los Angeles										
Run Date: AUG-01-19 11:23 PM										
Report Month: 07/2019										
Cal-Learn Performance Measures Details									Total:	0
			Orientation Completion Rate:		School Enrollment Rate:		Report Card Submission Rate:		GED/High School Graduation Rate:	
			0.00%		0.00%		0.00%		0.00%	
Total:			0		0		0		0	
Provider Name	Case Number	CIN	Scheduled for Orientation	Completed Orientation in the Review Period	Completed Orientation	Enrolled in School	Report Card Due In Review Period	Submitted a Report Card	Completed at least the 11th Grade and Left the Program	Received a GED/High School Diploma

Figure 2.5.2 – Performance Measures worksheet

### 2.10.4 Supportive Services Worksheet

 <b>Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions</b>										
Los Angeles										
Run Date: AUG-01-19 11:23 PM										
Report Month: 07/2019										
Cal-Learn Supportive Services Details									Total:	0
Total:			0		0		0		0	
Supportive Services										
Provider Name	Case Number	CIN	Child Care	Transportation	Ancillary Services					

Figure 2.5.3 – Performance Measures worksheet

### 2.10.5 Bonuses and Sanctions Worksheet

 <b>Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions</b>										
Los Angeles										
Run Date: AUG-01-19 11:23 PM										
Report Month: 07/2019										
Bonuses and Sanctions									Total:	0
Total:			0		0		0		0	
Bonuses and Sanctions										
Provider Name	Case Number	CIN	Received a Bonus in the Review Period	Report Card Showed Satisfactory Progress	High School Diploma Earned or Equivalent	Received a Sanction in the Review Period	Report Card Showed Less Than Adequate Progress	Report Card Was Not Submitted	Submitted a Late Report Card Without Good Cause	

Figure 2.5.4 – Bonuses and Sanctions worksheet

### 2.10.6 Description of Change

The Summary, Performance Measures and Bonuses and Sanctions worksheets provide data points and metrics pertaining to participants who receive a GED or High School Diploma.

1. Update all report logic to treat a degree of type CHSPE (CalSAWS only ) and HiSET in the same manner as a degree of type GED or High School Diploma.

Code	Category ID	Short Description
CP	30	CHSPE
TBD	30	HiSET

- a. The 'Received a GED/High School Diploma' column on the Performance Measures worksheet will populate a 'yes' if the degree is of type CHSPE or HiSET and all other criteria are met.
- b. The Supportive Services worksheet is not impacted.
- c. The 'High School Diploma Earned or Equivalent' column on the Bonuses and Sanctions worksheet will populate a 'yes' if the degree is of type CHSPE or HiSET and all other criteria are met.
- d. The Summary worksheet derives metrics based on data in the detailed worksheets. The following lines on the Summary worksheet will be indirectly impacted by the modifications, however there are no required changes to the worksheet itself:
  - i. Participants who Received a GED/High School Diploma in the Performance Measures section
  - ii. High School Diploma Earned or Equivalent in the Bonuses and Sanctions section

**Note:** The reports modifications are limited to back end logic only. The report layout and cosmetics will not be modified.

### 2.10.7 Report Location

- Global: Reports
- Local: Scheduled
- Task: Administrative

### 2.10.8 Counties Impacted

Only Los Angeles County is impacted.

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## 2.11 Correspondence: Updates to GN 6006 Form

### 2.11.1 Overview

This effort is to make updates to GN 6006 form (revision 12/2012). This form can be currently generated from template repository or from Customer Activity Detail Page for certain Activities. GN 6006 is the “Service Provider Referral” form.

LA Specific Form: GN 6006 (12/2012)

Current Programs: Welfare To Work, Cal-Learn, REP

Current Attached Forms: N/A

Current Forms Category: Referrals

Existing Languages: English

### 2.11.2 Update GN 6006 Form

This form has a minor update to the verbiage and population for a section of the form.

Updated Languages: English

Form Mock Up: See Supporting Document #1

### 2.11.3 Updates to the Form Verbiage

The following is the change in the verbiage:

Existing Text	Updated Text	Location in Document
<b>HIGH SCHOOL DIPLOMA/GED/HiSET:</b>	HIGH SCHOOL DIPLOMA/GED/CHSPE/HiSET:	3 <sup>rd</sup> Block on Second Page, Section A

### 2.11.4 Updates to GN 6006 Form Variable Population:

Update the GN 6006 form with following variables for the updated verbiage mentioned in the above section.

Variable Name	Population	Formatting	Template Repository Population
<Degree_Type>	Degree Type selected in the “Degrees License Detail” Page if the selected Degree is one of the following:	Arial Font Size 10	Y

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	<ul style="list-style-type: none"> <li>• GED</li> <li>• High School Diploma</li> <li>• CHSPE</li> <li>• HiSET</li> </ul>		
--	--	--	--

Degree types that are currently being populated on the form are GED and High School Diploma, with this update the form should populate CHSPE or HiSET if the selected degree type is 'CHSPE' or 'HiSET' respectively.

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### 3. Supporting Documents

Number	Functional Area	Description	Attachment
1	Client Correspondence	Updated GN 6006 form	  GN6006_EN1.pdf GN6006_EN1.pdf   GN6006_EN1.pdf GN6006_EN1.pdf   GN6006_EN1.pdf GN6006_EN1.pdf

## 4. Requirements

---

### 4.1.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant s/participant s eligibility for a program or programs.	EDBC logic will be updated to exclude the mandatory Cal-Learn program for CHSPE.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-202778 | CIV-7564

Revised Medi-Cal Hierarchy

		DOCUMENT APPROVAL HISTORY
CalSAWS	Prepared By	Tisha Mutreja, Mathew Lower, William Baretzky
	Reviewed By	Renee Gustafson, Chad Quan, Appalaraju Indala, Prashant Goel, Derek Goering, Michael Wu, Long Nuygen, Akira Moriguchi, Geetha Ramalingam, William Baretzky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/25/2019	1.0	Initial Draft	Tisha Mutreja
10/08/2019	1.0	Added Flow Chart to Explain Revised Medi-Cal Hierarchy to recommendation 2.1.2.3	Tisha Mutreja
10/18/2019	1.0	Added No Potential MAGI Criteria to recommendation 2.1.2.1	Tisha Mutreja
10/25/2019	1.0	Added Online Recommendation to 2.2	Mathew Lower
11/1/2019	1.0	Added More than 1 Person Case Scenario to Recommendation 2.1.2.3	Tisha Mutreja
11/18/2019	1.0	Update logic for More than 1 Person Case Scenario to Recommendation 2.1.2.3 after Committee Feedback	Tisha Mutreja
11/27/2019	1.0	Automated Regression Section added	William Baretzky
12/04/2019	1.0	Updated document to Define 'No Potential MAGI' as 'Potential MAGI' Also, Updated Recommendation 2.2.2.2 to add 'Aged' in the criteria	Tisha Mutreja
12/18/2019	1.0	Committee Approved Draft	Tisha Mutreja
02/24/2020	1.1	Content Revision highlighted in yellow	Tisha Mutreja
03/10/2020	1.2	Content Revision redefined EDBC Type Reasons and household definition highlighted in yellow	Tisha Mutreja

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## 1 OVERVIEW

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This SCR is based on All County Welfare Director's Letter (ACWDL) 17-03 to transmit the Medi-Cal hierarchy to be used when determining or redetermining Medi-Cal eligibility. The policy contains instructions on the order in which Medi-Cal eligibility must now be determined.

Mega Mandatory groups must be considered first in the Medi-Cal hierarchy. The Mega Mandatory groups include SSI/SSP, Adoption Assistance, Foster Care (FC), Former Foster Youth, Pickle, Disabled Adult Child (DAC), Disabled Widower (DW) and Medicare Savings Programs (MSP). If the applicant or beneficiary has eligibility in one of the Mega Mandatory groups and a MAGI Medi-Cal eligibility result is returned for that applicant/beneficiary, counties must not automatically accept the MAGI Medi-Cal result for that applicant/beneficiary as the basis for eligibility. That applicant or beneficiary will remain in the household for income and household size determination purposes, but may only be changed to a MAGI Medi-Cal eligibility group if the applicant or beneficiary elects MAGI Medi-Cal.

With this SCR, **The Systems** will be updated to evaluate Mega Mandatory groups first in the Full Medi-Cal Hierarchy, then MAGI Medi-Cal and lastly the rest of Non-MAGI Medi-Cal programs. The order of the Non-MAGI Medi-Cal programs will be updated to evaluate the Optional Categorical programs [Aged & Disabled Federal Poverty Level (A&D FPL), Blind FPL, Working Disabled 250%] before Medically Needy/Medically Indigent (MN/MI) programs [Aged, Blind and Disabled MN (ABD MN), Aid to Families with Dependent Children MN (AFDC MN), MI Child, MI Pregnant].

Since the Full Medi-Cal Hierarchy is being re-vamped, The Systems will be updated to incorporate a check for "Potential MAGI" criteria within the Medi-Cal Hierarchy per ACWDL 18-16 and will no longer require the Worker to set the Requested Medi-Cal type to "No Potential MAGI" to bypass the requirement for a MAGI Determination when the individual meets the criteria.

## 1.1 Current Design

The Systems' Medi-Cal Hierarchy for the Requested Medi-Cal Type "Medi-Cal" tests eligibility in the following order:

- a. MAGI Medi-Cal Eligibility
- b. Non-MAGI Medi-Cal Eligibility
  - i. Mega Mandatory
    1. Pickle
    2. DAC
    3. DW
  - ii. Medically Needy/Medically Indigent (Regular MC Test Category)
    1. ABD MN Blind
    2. ABD MN Aged
    3. ABD MN Disabled
    4. AFDC/MN
    5. MI Child
    6. MI Pregnant
  - iii. Optional Categorical (Percent Test Category)
    1. A&D FPL
    2. Blind FPL
    3. Working Disabled 250%
  - iv. State Only
    1. Dialysis
    2. Tuberculosis
    3. Parental Hyperalimantation (TPN)
    4. 60-day postpartum
  - v. Medicare Savings Programs (MSP)
    1. Qualified Medicare Beneficiary (QMB)
    2. Specified Low Income Medicare Beneficiary (SLMB)
    3. Qualifying Individual QI1)
    4. Qualified Working Disabled Individual (QWDI)

**Note:** All other Mega Mandatory groups (as mentioned in ACWDL 17-03) are not included in The Systems' Medi-Cal Hierarchy rules since these programs have their own respective Requested Medi-Cal Type such as –

- Former Foster Youth(4M)
- AAP EFC(07), AAP Federal(03), AAP State(04)
- FC Unpaid(45), ICAMA(06), ICPC(46), KG Federal(4T)
- Child Welfare Services Medi-Cal

Or

are tracked only in Other Program Assistance (e.g. SSI/SSP).

Also, The Systems can grant MSP in two ways: by the worker selecting the "Medical Premium Payment Program" Requested Medi-Cal Type or by the Medi-Cal Hierarchy for the "Medi-Cal" Requested Medi-Cal Type; only Requested Medi-Cal Type "Medi-Cal" runs through the Medi-Cal Hierarchy.

The Systems have the “No Potential MAGI” Requested Medi-Cal Type which allows a Worker to run through the Non-MAGI Medi-Cal Eligibility Rules on the case only without requiring a MAGI Determination (per ACWDL 18-16). The individual is considered “No Potential MAGI” eligible when there is no MAGI Medi-Cal eligibility due to:

- a. being aged or blind/disabled **and** receiving Medicare **and**
- b. there is no dependent child or pregnant person(s) in the household

The Systems have several page validations on Run EDBC, Negative Action and Request MAGI pages to ensure that a Worker uses “No Potential MAGI” Requested Medi-Cal Type only when appropriate.

The Systems have available Requested Medi-Cal Types that are outdated and no longer used.

- a. 1931 for Adult Minor Parent
- b. Medi-Cal – Property Disregard
- c. Medi-Cal – No Property Information
- d. Express Lane Adults 19-64
- e. Express Lane Parents 19-64
- f. Express Lane Under 19

## 1.2 Requests

Per ACWDL 17-03, the Mega Mandatory group must be evaluated before MAGI Medi-Cal in the Medi-Cal Hierarchy and the Optional Categorical programs (A&D FPL, Blind FPL and Working Disabled 250%) must be evaluated before Medically Needy/Medically Indigent programs (ABD MN, AFDC MN, MI Child, MI Pregnant). The Mega Mandatory group must be evaluated before MAGI Medi-Cal; therefore, a MAGI Determination is not required to test for Mega Mandatory.

Incorporate the check for Potential MAGI in the Full Medi-Cal Hierarchy EDBC Rules instead of requiring the Worker to set the Requested Medi-Cal type “No Potential MAGI.”

Create an automatic Journal Entry when EDBC determines MAGI Determination is not required.

### 1.3 Overview of Recommendations

1. Remove the MAGI hard validations from Run EDBC and Manual EDBC page that requires a MAGI Determination prior to running Medi-Cal EDBC for Requested Medi-Cal Type "Medi-Cal" when at least one of the person on the Medi-Cal program block has Full Medi-Cal Hierarchy = 'Yes'.
2. Update the Medi-Cal EDBC Rules to evaluate Mega Mandatory first in the Medi-Cal hierarchy with below priority:
  - a. Disabled Adult Child (DAC)
  - b. Pickle
  - c. Disabled Widow/Widower
  - d. Medicare Savings Programs (MSP)
3. Update the Medi-Cal EDBC Rules to incorporate the check for Potential MAGI to determine if a MAGI Determination is required to continue with the Medi-Cal EDBC.
4. Update Medi-Cal EDBC Rules to evaluate Optional Categorical programs before Medically Needy/Medically Indigent programs.
5. Remove the following Requested Medi-Cal Types:
  - a. No Potential MAGI
  - b. 1931 for Adult Minor Parent
  - c. Medi-Cal – Property Disregard
  - d. Medi-Cal – No Property Information
  - e. Express Lane Adults 19-64
  - f. Express Lane Parents 19-64
  - g. Express Lane Under 19
6. Update Batch EDBC Skip Reasons for Requested Medi-Cal Type "Medi-Cal" when at least one of the person on the Medi-Cal program block has Full Medi-Cal Hierarchy = 'Yes'.
7. Create a Journal Entry for cases where EDBC determines MAGI Determination is not required for the household.

### 1.4 Assumptions

1. Medi-Cal programs not explicitly mentioned in the Description of Changes will retain their existing logic in the Medi-Cal hierarchy.
2. Pending release of DHCS policy on TMC – No changes to current Consumer Protection Programs in the Medi-Cal hierarchy.
3. No changes to existing Deemed Protection functionality.
4. No changes to MEDS. Read-Only EDBCs will not be communicated to MEDS.
5. Fields not mentioned in the Description of Changes sections, will not be updated.

## 2 RECOMMENDATIONS

### 2.1 Requested Medi-Cal Type Detail Page

#### 2.1.1 Overview

This page allows the worker to select Requested Medi-Cal Type for the Program Person to grant them specific eligibility. Outdated Requested Medi-Cal Types will be removed from the drop-down display and cannot be used any longer while creating new records.

#### 2.1.2 Requested Medi-Cal Type Detail Mockup

The screenshot shows a web form titled "Requested Medi-Cal Type Detail". At the top left, there is a red asterisk icon followed by the text "\*- Indicates required fields". At the top right, there are two blue buttons: "Save and Return" and "Cancel". Below this is a blue header bar with the text "Requested Medi-Cal Type Information". Underneath the header, there are three fields: "Requested Medi-Cal Type: \*" with a dropdown menu showing "- Select -", "Begin Month: \*" with a text input field and a calendar icon, and "End Month:" with a text input field and a calendar icon. At the bottom right, there are two more blue buttons: "Save and Return" and "Cancel".

Figure 2.1.1 – Requested Medi-Cal Type Detail page

#### 2.1.3 Description of Changes

1. Remove the following options from the Requested Medi-Cal Type drop down when adding new records:
  - a. No Potential MAGI
  - b. 1931 for Adult Minor Parent
  - c. Medi-Cal – Property Disregard
  - d. Medi-Cal – No Property Information
  - e. Express Lane Adults 19-64
  - f. Express Lane Parents 19-64
  - g. Express Lane Under 19

If a historical record exists with one of the removed Requested Medi-Cal Types, the Worker will be able to edit the existing record although the record cannot be updated to use a removed Requested Medi-Cal Type.

2. Generate a list for records with the above mentioned Requested MC Types in #1 for counties to take appropriate actions. Refer to section 5 'Outreach' for further details.

#### 2.1.4 Page Location

- **Global: Case Summary**
- **Local: Medi-Cal Detail**
- **Task: Medi-Cal Person Detail > Requested Medi-Cal Type Detail**

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

N/A

#### 2.1.7 Page Usage/Data Volume Impacts

N/A

### 2.2 Eligibility Rules Update

#### 2.2.1 Overview

Remove the hard validation on the Run EDBC and Create Manual EDBC pages that prevents a Worker from running Medi-Cal EDBC without a valid MAGI Determination. Update the Medi-Cal EDBC Rules to evaluate for Mega Mandatory eligibility first in the Medi-Cal Hierarchy, to include the "Potential MAGI" criteria for the "Medi-Cal" Requested Medi-Cal Type and to evaluate Optional Categorical before Medically Needy/Medically Indigent in the Medi-Cal Hierarchy.

#### 2.2.2 Description of Changes

1. Update the page validations on the Run EDBC and Create Manual EDBC pages to not prevent a Worker from running Medi-Cal EDBC without a valid MAGI Determination when at least one person on the Medi-Cal program is requesting to be run through the Full Medi-Cal Hierarchy.

Remove the below mentioned validations when all of the following criteria are true:

- i. there is at least one active, **ineligible** or pending individual on the Medi-Cal program with Customer Option: Full Medi-Cal Hierarchy = 'Yes'
  - ii. Requested Medi-Cal Type = 'Medi-Cal'
- a. **Validation Message:** "Medi-Cal: EDBC cannot be run for this program. A MAGI determination must be run and marked as

- Reviewed for the selected or prior benefit month within the same Redetermination period.”
- b. **Validation Message:** “Medi-Cal: EDBC cannot be run for this program. All open applicants in the valid MAGI Determination are MAGI Pending eligible.”
  - c. **Validation Message:** “Medi-Cal: EDBC cannot be run for this program. All open applicants are required to be in the MAGI determination which is valid for this benefit month.”
2. Update Medi-Cal EDBC Rules to add the following “Potential MAGI” criteria to Requested Medi-Cal Type ‘Medi-Cal’ instead of using ‘No Potential MAGI’ Requested Medi-Cal Type to determine when a MAGI Determination is required.

MAGI Determination is not required when:

The **household\*** is potentially Non-MAGI Medi-Cal eligible, with no MAGI Medi-Cal eligibility, due to being aged or blind/disabled **and** receiving Medicare, **and** there is no dependent child or pregnant person(s) in the household.

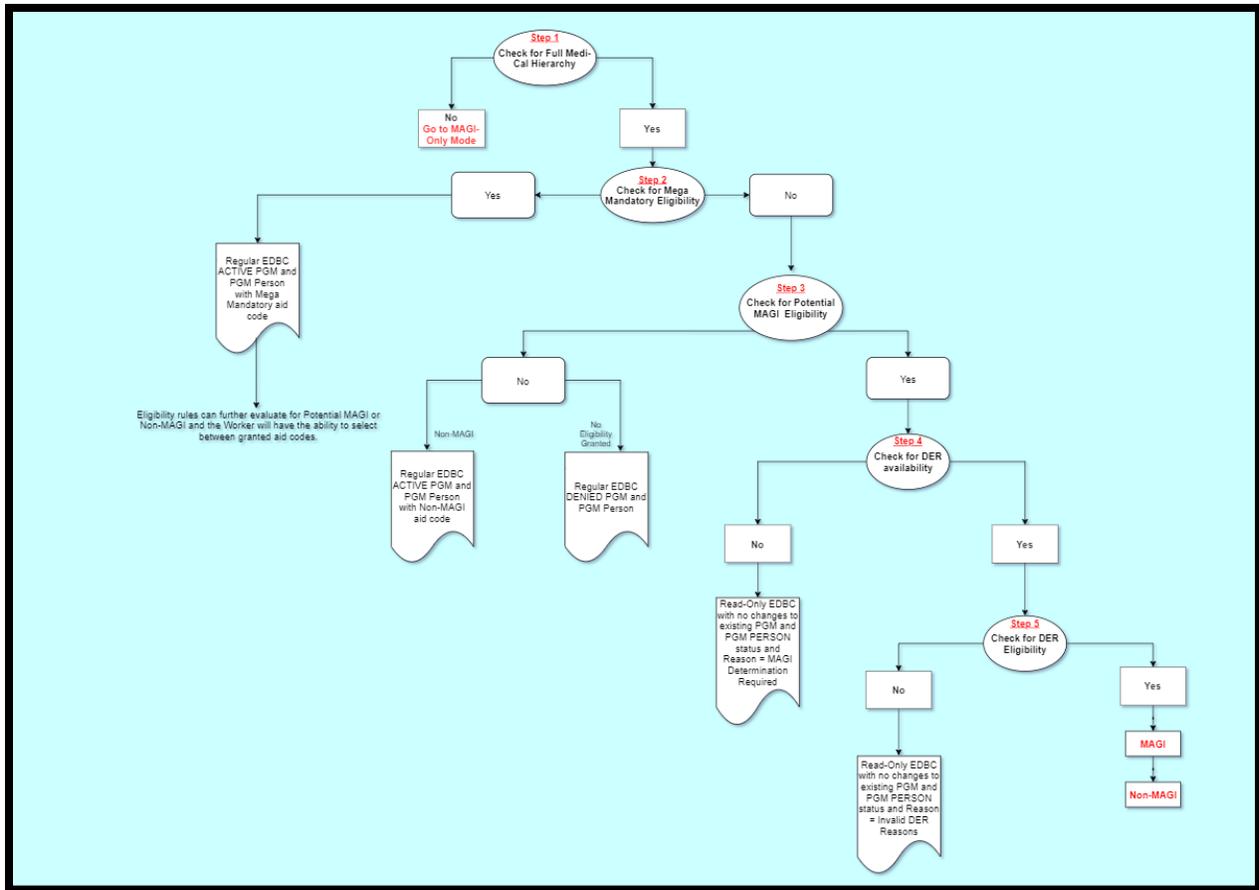
**household\***: Comprises of all individuals living ‘in the home’\*\* or ‘temporarily out of home’ based on details on the Household page.  
**‘in the home’\*\*** : any individual with ‘in the home’ status on the household page or,  
 no record exists for that individual on the page or,  
 with the exception of ‘Excluded Step Parent’ regardless of the Household status or,  
 with the exception of ‘Tax Dependent’ regardless of the Household status

- A person is considered aged when all the following are true:
    - a person who is age 65 or older for at least one day of the benefit month
  - A person is considered a child when all the following are true:
    - a person who is age 18 or younger for at least one day of the benefit month
  - A person is considered pregnant when all the following are true:
    - a pregnancy record exists for the individual with all the following are true:
      - Reported Month is on or before the benefit month
      - Pregnancy end month is on or after benefit month
- Note:** *Pregnancy end month is the Termination Month and if Termination Month does not exist, it is Delivery Month*
- A person is considered disabled when one of the following are true:

- A person with a Medical Condition with all the following true:
  - Medical Condition Category: Active Verified
  - Medical Condition Type: SP-DDSD Disabled, SSA Disabled
  - The record exists for at least one day of the benefit month
- A person is considered blind when all the following are true:
  - A person with Medical Condition record with all the following true:
    - Medical Condition Category: Active
    - Verified
    - One of the following Medical Condition Type: SSA Blind, SSI Blind, SP-DDSD Blind
    - The record exists for at least one day of the benefit month

If any individual on the Medi-Cal program does not meet the criteria mentioned above then a MAGI Determination is required for a Full Medi-Cal Hierarchy determination. (See 2.2.2.3 Step 3)

3. Update the Medi-Cal EDBC Rules to follow the Medi-Cal Hierarchy for Requested Medi-Cal Type "Medi-Cal" explained in the Flow Chart below:



**Figure 2.1.2.2 – Medi-Cal Hierarchy Flow Chart**

**Step 1:** Check for “Full Medi-Cal Hierarchy” in the Customer Options entered by the eligibility worker.

- a. If ‘No’: EDBC rules will evaluate for MAGI-Only Mode.
- b. If ‘Yes’: EDBC rules will evaluate for Mega Mandatory first in the MC Hierarchy in the below order without requiring MAGI Determination.
  - i. Disabled Adult Child (DAC)
  - ii. Pickle
  - iii. Disabled Widow/Widower
  - iv. MSP (secondary aid code)

If an individual is eligible to Pickle, DAC, or Disabled Widow/Widower at the same time, grant the DAC program.

**Step 2:** Check for “Mega Mandatory” Eligibility.

- a. If ‘Yes’: EDBC rules will create a “Regular” EDBC with Active Program (PGM) and PGM Person and provide appropriate Mega Mandatory program aid code. Eligibility rules will further evaluate for Potential MAGI or Non-MAGI and Worker can Elect between granted aid codes.

- b. If 'No': EDBC rules will evaluate for "Potential MAGI" criteria.

**Step 3:** Check for "Potential MAGI" Eligibility.

- a. If 'No': EDBC rules will determine at this point that the individual has No Potential MAGI eligibility and will be evaluated for Non-MAGI Medi-Cal programs.
- b. If 'Yes': EDBC rules will determine at this point that the individual is potentially eligible for MAGI and will check for DER availability if any.

**Step 4:** Check for "DER Availability".

- a. If 'No' and at least one individual is not Mega Mandatory Eligible: EDBC rules will create a "Read-Only" EDBC with no changes to existing PGM and PGM PERSON status and will let the Worker know that "MAGI Determination is Required".
  - Add the following new EDBC Type Reasons (CT\_502)
    - i. **EDBC Type Reason:** MAGI Determination is Required  
**Criteria:** No Determination is available for the case
    - ii. **EDBC Type Reason:** DER not reviewed  
**Criteria:** None of the MAGI Determinations for the EDBC benefit month or prior has been 'Reviewed'  
**Technical Note:** Matches existing criteria for CT707\_MN
- b. If 'No' and all individuals are Mega Mandatory Eligible: EDBC rules will create a "Regular" EDBC with Active Program (PGM) and PGM Person and provide appropriate Mega Mandatory program aid code.
- c. If 'Yes': EDBC rules will further evaluate the eligibility of the available DER.

**Step 5:** Check for "DER Eligibility".

- a. EDBC rules will create a "Read-Only" EDBC with no changes to existing PGM and PGM PERSON status and will let the Worker know the "Invalid DER Reasons".
  - Add the following new EDBC Type Reasons (CT\_502)
    - i. **EDBC Type Reason:** MAGI Eligible person not open on MC  
**Criteria:** Not all eligible people on the Determination have an open Medi-Cal Application  
**Technical Note:** Matches existing criteria for CT707\_DR (Should run for all Batches/Online similar to RE Batch as of today)
    - ii. **EDBC Type Reason:** MC Applicant missing on DER  
**Criteria:** if any of the applicants is NOT on the Determination  
**Technical Note:** Matches existing criteria for CT707\_MA
    - iii. **EDBC Type Reason:** MAGI Determination is Pending for all applicants

**Criteria:** All open applicants in the valid MAGI Determination are MAGI Pending eligible

**Technical Note:** Matches existing criteria for CT707\_MP

- b. If None of the above criteria is met, EDBC rules will evaluate for MAGI and Non-MAGI depending on the Determination Response.
  - c. If all individuals are Mega Mandatory Eligible: EDBC rules will not create a “Read-Only” instead will create a “Regular” EDBC with Active Program (PGM) and PGM Person and provide appropriate Mega Mandatory program aid code.
4. Update Medi-Cal EDBC rules to evaluate Optional Categorical before Medically Needy/Medically Indigent.

### 2.2.3 Programs Impacted

Medi-Cal

### 2.2.4 Performance Impacts

No Impacts.

## 2.3 Automatic Journal Entry

### 2.3.1 Overview

The Systems will create an automatic journal entry when EDBC determines MAGI Determination is not required.

### 2.3.2 Description of Change

1. Create a Journal Entry (one per EDBC run) for cases where EDBC determines the household does not require a MAGI Determination due to Recommendation 2.2.2.2.

The Journal Entry will be displayed as follows on Journal Detail page:

**Journal Category:** Eligibility

**Journal Type:** Program Status Update

**Short Description:** No Potential MAGI Medi-Cal Eligibility

**Long Description:** The system evaluated EDBC with No Potential MAGI Eligibility for the entire household for <Benefit Month>.

## 2.4 Batch EDBC

### 2.4.1 Overview

Update Batch EDBC Skip Reasons to not prevent running Batch EDBC without a valid MAGI Determination when at least one person on the Medi-Cal program is requesting to be run through the Full Medi-Cal Hierarchy.

### 2.4.2 Description of Change

1. Update the following EDBC Skip Reasons with the below mentioned conditions in addition to the existing criteria:
  - i. There is at least one active, ineligible or pending individual on the Medi-Cal program with Customer Option: Full Medi-Cal Hierarchy = 'Yes'
  - ii. Requested Medi-Cal Type = 'Medi-Cal'
- a. Skip Reason (CT707\_MN): MAGI Determination Not Received
- b. Skip Reason (CT707\_MP): All Individual's MAGI Determinations are Pending
- c. Skip Reason (CT707\_MA): Not all Applicants are in determination
- d. Skip Reason (CT707\_DR): Not all eligible people on the determination have an open Medi-Cal App

### 2.4.3 Execution Frequency

No Change

### 2.4.4 Key Scheduling Dependencies

No Change

### 2.4.5 Counties Impacted

All Counties

### 2.4.6 Data Volume/Performance

N/A

### 2.4.7 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...)

## 2.5 Automated Regression Test

### 2.5.1 Overview

Update the existing automated regression test (ART) scripts that use any of the deprecated Medi-Cal Request Type values to yield the same results using the new EDBC logic. Create new ART scripts to verify an individual result from each branch in the EDBC logic outlined in Figure 2.1.2.2 above.

### 2.5.2 Description of Change

1. Update the case setup steps of all existing ART scripts that use one (or more) of the Medi-Cal Request Types being removed to:
  - a. Select the 'Medi-Cal' request type
  - b. Yield the same EDBC results: Program Status, Person Status(es), Aid Code(s), associated Reason values where applicable
2. Create new ART scripts to set up appropriate case and Medi-Cal program constructs, and run EDBC to generate each of the following results, if not already covered under the previous recommendation:
  - a. MAGI-only
  - b. Mega Mandatory Eligible
    - i. **Note:** For any single Mega Mandatory group
  - c. No Potential MAGI: Eligible (Active)
  - d. No Potential MAGI: Not Eligible (Denied)
  - e. No available DER
  - f. No valid DER (Error)
  - g. Valid DER: Denied MAGI
    - i. **Note:** Non-MAGI may be Eligible or Not Eligible
  - h. Valid DER: Elect MAGI
  - i. Valid DER: Elect Non-MAGI

**Note #1:** Each result may be set up and verified alone, or in tandem with other results (e.g., when setting up a Medi-Cal program with multiple applicants).

**Note #2:** Each script must be able to execute without a live MAGI connection (i.e., using the CHEWS / MAGI Emulator).

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Policy	ACWDL 17-03: Revised Medi-Cal Hierarchy	 ACWDL 17-03.pdf
2	Policy	ACWDL 18-16: Applications or Renewals with No Potential Modified Adjusted Gross Income Eligibility	 ACWDL 18-16.pdf

### 4 REQUIREMENTS

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#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.14	The LRS shall display results to COUNTY-specified Users after each eligibility determination, for User review and the editing of information, as necessary.	Eligibility will be determined for each group where the applicant/beneficiary has potential Medi-Cal eligibility.

### 5 OUTREACH

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#### 5.1 Lists

List will be generated for all the existing records with removed Requested MC Type after the Implementation of the SCR.

The list will display the standard columns.

**Standard Columns:**

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

**List Name:** Cases with Removed Requested MC Type

**List Criteria:** Cases that have an Active or Pending Medi-Cal program block with at least one high-dated Requested MC Type record for below types post the Implementation of the SCR :

- a. No Potential MAGI
- b. 1931 for Adult Minor Parent
- c. Medi-Cal – Property Disregard
- d. Medi-Cal – No Property Information
- e. Express Lane Adults 19-64
- f. Express Lane Parents 19-64
- g. Express Lane Under 19

**Additional Columns:**

- Requested MC Type

**County Action:** Counties to review the list to take appropriate actions for all the existing records with outdated Requested MC Type.

The list will be posted to the following locations:

System	Path
CalSAWS /LRS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2019>CA-202778
C-IV	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2019>CIV-7564

## 6 APPENDIX

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1. **The Systems:** "The Systems" refers to both CalSAWS/LRS and C-IV Systems.

For instance, if the document mentions the below:

- The Systems must add ....

That implies:

- Both CalSAWS/LRS and C-IV must add ....