

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214686 | CIV-106814

CalHEERS eHIT: BREfS - Consume SAWS Eligibility
Authorization and Manage Downstream
Processes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Feliciano
	Reviewed By	Derek Goering, Max Volf, Prashant Goel, Geetha Ramalingam, Krishna Akula

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/01/2020	0.1	Draft Design	M. Feliciano
08/26/2020	0.2	Reviewed with Analysts	M. Feliciano
9/2/2020	0.3	Committee Review	M. Feliciano
9/4/2020	0.4	Build and Test Team Review	M. Feliciano
10/6/2020	1.0	Reviewed with Committee	M. Feliciano
10/22/2020	1.5	Updates based on Build Team input	M. Feliciano

Table of Contents

1	Overview	6
1.1	Current Design.....	6
1.2	Requests.....	8
1.3	Overview of Recommendations.....	9
1.4	Assumptions	10
2	Recommendations.....	11
2.1	MAGI Determination Summary Page	11
2.1.1	Overview	11
2.1.2	MAGI Determination Summary Mockup	12
2.1.3	Description of Changes	12
2.1.4	Page Location	13
2.1.5	Security Updates.....	13
2.1.6	Page Mapping.....	13
2.1.7	Page Usage/Data Volume Impacts	13
2.2	MAGI Referral Detail Page	14
2.2.1	Overview	14
2.2.2	MAGI Referral Detail Page Mockup.....	14
2.2.3	Description of Changes	15
2.2.4	Page Location	15
2.2.5	Security Updates.....	15
2.2.6	Page Mapping.....	15
2.2.7	Page Usage/Data Volume Impacts	15
2.3	MAGI Disposition List Page	15
2.3.1	Overview	15
2.3.2	MAGI Disposition List Page Mockup.....	16
2.3.3	Description of Changes	16
2.3.4	Page Location	18
2.3.5	Security Updates.....	18
2.3.6	Page Mapping.....	18
2.3.7	Page Usage/Data Volume Impacts	18
2.4	MAGI Disposition Detail Page	18
2.4.1	Overview	18

2.4.2	MAGI Disposition Detail Page Mockup.....	19
2.4.3	Description of Changes	21
2.4.4	Page Location	22
2.4.5	Security Updates.....	23
2.4.6	Page Mapping.....	23
2.4.7	Page Usage/Data Volume Impacts	23
2.5	Person Association List Page	23
2.5.1	Overview	23
2.5.2	Person Association List Page Mockup.....	23
2.5.3	Description of Changes	24
2.5.4	Page Location	24
2.5.5	Security Updates.....	24
2.5.6	Page Mapping.....	24
2.5.7	Page Usage/Data Volume Impacts	25
2.6	Person Association Detail Page	25
2.6.1	Overview	25
2.6.2	Person Association Detail Page Mockup.....	25
2.6.3	Description of Changes	25
2.6.4	Page Location	26
2.6.5	Security Updates.....	26
2.6.6	Page Mapping.....	26
2.6.7	Page Usage/Data Volume Impacts	26
2.7	MAGI Disposition Error Detail Page	26
2.7.1	Overview	26
2.7.2	MAGI Disposition Error Detail Mockup.....	27
2.7.3	Description of Changes	27
2.7.4	Page Location	28
2.7.5	Security Updates.....	28
2.7.6	Page Mapping.....	28
2.7.7	Page Usage/Data Volume Impacts	28
2.8	eHIT.....	28
2.8.1	Overview	28
2.8.2	Description of Change.....	29
2.8.3	Interface Partner.....	33
2.8.4	eHIT Schema Version.....	33

3	Supporting Documents	33
4	Requirements	34
4.1	Project Requirements	34

1 OVERVIEW

This document details updates to The Systems in support of changes in the electronic Health Information Transfer (eHIT) with CalHEERS Change Request 160528, Business Rules Exposure for SAWS (BREFS) - Consume SAWS Eligibility Authorization and Manage Downstream Processes. This change updates the use of the Disposition transaction to sync up CalHEERS with the correct eligibility authorized in The Systems.

1.1 Current Design

The Systems send a Disposition transaction to CalHEERS via eHIT to communicate that The System processed a DER. The Disposition transaction informs CalHEERS:

1. The MAGI Medi-Cal eligibility in the DER was accepted
or
The Non-MAGI Medi-Cal eligibility granted in The Systems Medi-Cal Eligibility Determination/Benefit Calculations (EDBC).
 - This includes the Non-MAGI Medi-Cal referral status, Non-MAGI Medi-Cal primary aid code, the Non-MAGI Medi-Cal eligibility status and begin/end dates.
2. The case and person linkage
3. When appropriate, the CalWORKs (CW) or CalFresh (CF) referral status and CalWORKs or CalFresh eligibility
 - This includes the CW/CF referral status, CW/CF primary aid code, the CW/CF eligibility status and begin/end dates per program type.
4. MAGI Medi-Cal NOA Generation Information
 - This information is deprecated in eHIT and no longer used by CalHEERS because CalSAWS now generates the MAGI NOAs.

The Disposition transaction is not visible in The Systems pages for a user to view, but when CalHEERS acknowledges receipt of the Disposition transaction, The Systems update the corresponding DER status to 'Complete'.

If CalHEERS responds with an error for the Disposition, the Disposition error is not shown to the user.

The current triggers to send a Disposition transaction are as follows:

1. **No EDBC:** The Systems send a Disposition without running EDBC when the DER contains all individuals MAGI Medi-Cal Pending Eligible and the status is updated to 'Reviewed'. An unsolicited DER (DER-U) becomes 'Reviewed' after the User marks the status from 'In Process' to 'Reviewed'. A solicited DER is automatically marked 'Reviewed' when received from CalHEERS because it is based on the EDR sent from The Systems. A Disposition is not sent without running EDBC for a Renewal DER (either Batch or Manual). The purpose for The Systems to send a Disposition without running EDBC is to communicate the case and person linkage to CalHEERS.

2. **Accepted and Saved EDBC:** The Systems send a Disposition when a DER is used in an Accepted and Saved EDBC. A Read-Only EDBC does not trigger a Disposition. The first time The Systems send a Disposition for a DER with final MAGI Medi-Cal eligibility is when the Accepted and Saved EDBC benefit month matches the DER benefit month. If EDBC is run again for the same benefit month or a later benefit month and the same DER is used, The System will send a new Disposition if the Accepted and Saved EDBC has a change in Medi-Cal Eligibility.

When there are multiple DERs for the same EDBC benefit month, EDBC logic uses the latest valid DER received on or before the EDBC benefit month to grant MAGI Medi-Cal eligibility, but the eHIT logic will send a Disposition for each DER when the EDBC is Accepted and Saved. Disposition logic checks the status of the DER used in the EDBC is 'Reviewed' and sends a Disposition for all 'Reviewed' DERs with the same benefit month as the EDBC month.

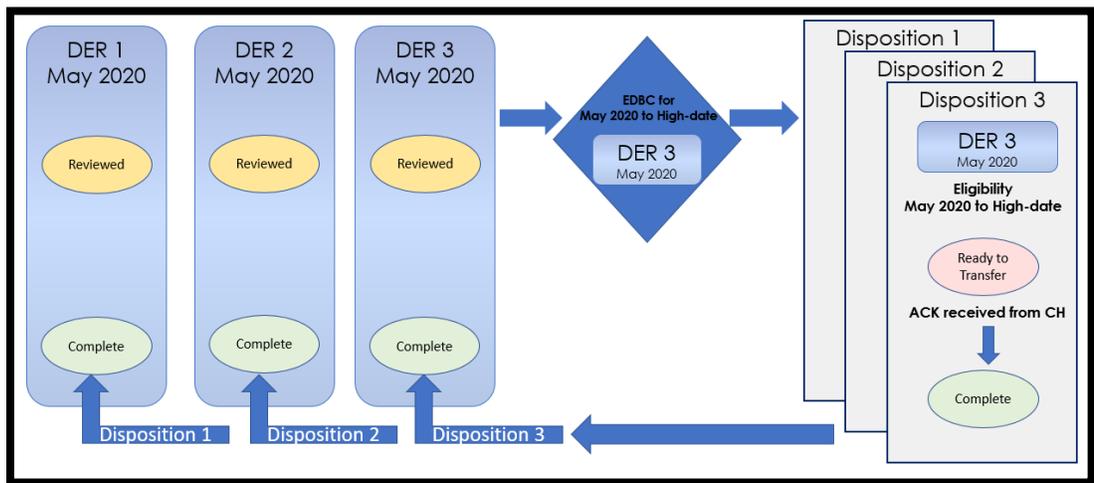


Figure 1- Current Design: Multiple DERs for one Benefit Month; Multiple Dispositions

When EDBC is run on a subsequent Benefit month from the DERs received, the logic checks the status of the DER used in the EDBC is 'Reviewed'. The logic does not find a match between the DER benefit month and the EDBC benefit month and therefore does not send a Disposition. The DERs remain in a 'Reviewed' status. See Figure 2.

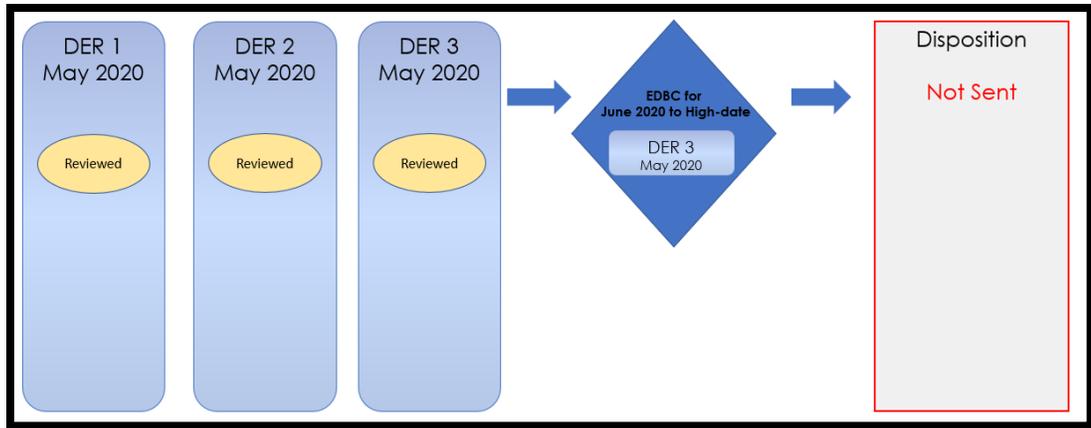


Figure 2- Current Design: EDBC Benefit Month does not match DER Benefit Month

When a DER includes a CalWORKs (CW) or CalFresh (CF) referral from CalHEERS, The Systems send a Disposition to communicate CalWORKs or CalFresh eligibility when the CW or CF EDBC is Accepted and Saved. The Systems continue to communicate CW and CF information in a Disposition anytime there are changes to CW or CF.

CalHEERS sends an eligibility determination to The Systems with the expectation that the CalHEERS-determined eligibility is final. The Systems either accept the eligibility determination, evaluate for other Non-MAGI Medi-Cal programs and when necessary, override the eligibility. For Intake and Add-a-Person the eligibility determinations become final in CalHEERS on the first day of the request after 8 p.m. due to the Same Day Remediation functionality.

CalHEERS processes the Non-MAGI Medi-Cal eligibility sent in the Disposition transaction to discontinue Covered CA Programs through a batch process, when appropriate.

The 'Eligibility Workload Inventory' page displays a Covered California icon when a DER is received and not yet actioned by the User. The icon no longer displays when the status is changed to: Complete, Suppressed, Cancelled, Completed Manually, Covered CA Only and Not Needed.

1.2 Requests

With CalHEERS Change Request 160528, CalHEERS will consume and save the Disposition information into the CalHEERS portal and update the CalHEERS downstream processes. The Systems will expand the information sent in the Disposition transaction to communicate the final eligibility authorized in the Accepted and Saved EDBC. The expanded information in the Disposition includes an Override reason, if applicable, and sending the authorized MAGI Medi-Cal eligibility.

1. Update eHIT to include Override Reasons in the Disposition transaction.
 - Admin Decision/ALJ ruling
 - Program/Regulation Not Implemented
 - CalHEERS/SAWS Defect
2. Map The Systems Medi-Cal EDBC Override reasons to the following three eHIT Override Reasons:
 - Admin Decision/ALJ ruling
 - Program/Regulation Not Implemented
 - CalHEERS/SAWS Defect
3. Map the Medi-Cal Deemed Infant EDBC budget types to eHIT Override Reason 'Program/Regulation Not Implemented'
4. Update Disposition functionality as follows:
 - No longer send a Disposition for DERs not used in the Medi-Cal Accepted and Saved EDBC when there are multiple DERs for the same benefit month.
 - Update the DER status to 'Suppressed' for all additional DERs not used in EDBC for the same benefit month with status 'Reviewed'.
 - Send a Disposition for the DER used in EDBC even when the DER benefit month does not match the Accepted and Saved EDBC benefit month if the DER status is 'Reviewed'.
 - Update the DER status to 'Suppressed' for all additional DERs not used in EDBC for the same benefit month with status 'Reviewed'.
 - Include the MAGI Medi-Cal primary aid code, program status and effective dates
 - Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
 - **Technical Note:** Eligibility change Dispositions for CalWORKs and Medi-Cal will continue to send.
5. Modify eHIT logic to no longer mark a DER with 'Complete' status when a Disposition is sent for CalFresh or CalWORKs.
6. Update The Systems to display Dispositions.

1.3 Overview of Recommendations

1. Update the 'MAGI Determination Summary' page to display a Disposition section.
2. Update the 'MAGI Referral Detail' page with a button to open the new 'MAGI Disposition List' page to view all Dispositions associated to the DER.
3. Create a new 'MAGI Disposition List' page to display all Dispositions associated to a DER.
4. Create a new 'MAGI Disposition Detail' page to display the Disposition information.
5. Update the 'Person Association List' and 'Person Association Detail' pages to be dynamic and display the information for either a Disposition or an EDR.
6. Create a new 'MAGI Disposition Error Detail' page to display the Disposition Error received from CalHEERS.

7. Update eHIT to include an 'Override Reason' in the Disposition transaction for the Medi-Cal program when appropriate. The eHIT Override Reasons are:
 - Admin Decision/ALJ ruling
 - Program/Regulation Not Implemented
 - CalHEERS/SAWS Defect
8. Map the Medi-Cal EDBC Override reasons to the eHIT Override Reasons.
9. Map the Medi-Cal Deemed Infant EDBC budget type to eHIT Override Reason 'Program/Regulation Not Implemented'.
10. Update the eHIT logic to only send a Disposition for the DER used in the Accepted and Saved EDBC for a benefit month; update all prior DERs for the same EDBC benefit month with latest status 'Reviewed' to 'Suppressed'.
11. Update the eHIT logic to send a Disposition for the DER used in the Accepted and Saved EDBC when the benefit month is a subsequent month from the DER; update all prior DERs for the same EDBC benefit month with latest status 'Reviewed' to 'Suppressed'.
12. Update the Disposition transaction to send the MAGI Medi-Cal primary aid code, program status and effective dates.
13. Update the eHIT logic to only send a CalFresh Disposition once as a response to the CalFresh referral.
14. Modify eHIT logic to not mark a DER with 'Complete' status when a Disposition is for CalFresh or CalWORKs.

1.4 Assumptions

1. The CalHEERS Same Day Remediation functionality is not changing; CalHEERS will finalize eligibility and trigger downstream processes at 8 p.m.
2. There will be no one-time data change to update the status of existing DERs based on new Disposition logic.
3. Dispositions without a status will not display in the Disposition pages.
4. A Manual EDBC does not trigger a Disposition because it is not linked to a DER. This functionality will remain unchanged.
5. For page updates and new pages that display the standard name format, if the Date of Birth and/or Gender is not stored in the system, it will not display as part of the standard name format. If Gender is available, Gender will display per current system functionality as follows:
 - 'M' for Male or Transgender: Male to Female
 - 'F' for Female or Transgender: Female to Male
6. Page changes from CA-217839 (DDID 1991 - Display CalSAWS name throughout the system), planned for Release 21.01, are incorporated into the 'MAGI Referral Detail', 'Person Association List', 'Person Association Detail' pages. This design document assumes CA-217839 is implemented prior to this SCR.
7. Cash-based Medi-Cal received in Foster Care, Kin-GAP, AAP, RCA and SSI programs are not communicated to CalHEERS in a Disposition. Admin Verification of MEDS-Minimal Essential Coverage = 'Yes' is sent in an EDR to CalHEERS to communicate the individual has cash-based Medi-Cal coverage in these programs.

8. The System functionality for determining which DER is used in EDBC is not changing with this SCR.
9. The NOA Generation Information is sent in the Disposition but is not displayed as the information is not used. It will be removed from the Disposition in another SCR once CalHEERS removes it from the schema.
10. Fields not mentioned in the Description of Changes sections, will not be updated.

2 RECOMMENDATIONS

2.1 MAGI Determination Summary Page

2.1.1 Overview

The 'MAGI Determination Summary' page displays information for a MAGI Determination. The page allows the User to review the primary aid code and status of MAGI Medi-Cal eligibility for every individual on the DER.

The page displays the details of all Medi-Cal EDBC's run against the specific MAGI Determination. If an EDBC is listed, the User can click on the 'Begin Month' hyperlink to review the 'Medi-Cal EDBC Summary'.

The 'MAGI Determination Summary' page will now have a 'Disposition' column in the 'EDBCs Run Against this MAGI Determination' section for the User to view the Disposition sent to CalHEERS from each Medi-Cal EDBC.

2.1.2 MAGI Determination Summary Mockup

MAGI Determination Summary

[Close](#)

Request ID: 631243	Benefit Month: 07/2019	Date Run: 06/10/2019
Household Eligibility: Partially Eligible	Run Reason: Continuing	Requested by Batch: No

Name	Primary Aid Code	Status	Eligibility Evaluation Reasons	Negative Action Reason	Carry Forward Status
Test, LANITA 45F	M9	Eligible	Income Limit - Within Range, Current Monthly Income Used		No
Test, WILLENE 45M	X7	Ineligible	Income Limit - Not Within Range, Current Monthly Income Used		No

EDBC Run Against this MAGI Determination

Search Results Summary	Results 1 - 3 of 3
------------------------	--------------------

Begin Month	End Month	Type	EDBC Program Status	Date Run	EDBC Source	Disposition
07/2019	08/2019	Read-Only	Active	06/10/2019	Online EDBC Rules	Complete
07/2019	08/2019	Regular	Active	06/15/2019	Online EDBC Rules	Complete
08/2019	11/2019	Regular	Active	07/20/2019	Online EDBC Rules	Complete
12/2019		Regular	Active	10/18/2019	Batch EDBC Rules	Error

[Close](#)

Figure 2.1.1 – 'MAGI Determination Summary' page with 'Disposition' column

2.1.3 Description of Changes

1. Add a "Disposition" column to the 'EDBCs Run Against this MAGI Determination' section.

Field Label	Description
Disposition	Displays the latest status of the Disposition as a hyperlink .

	<p>Disposition status options are:</p> <ul style="list-style-type: none"> • Ready for Transfer • Complete • Error <p>If a Disposition transaction was not sent for that EDBC, the Disposition value is blank.</p> <p>'Ready for Transfer' and 'Complete' Disposition status hyperlink opens the 'MAGI Disposition Detail' page.</p> <p>'Error' status hyperlink opens the 'MAGI Disposition Error Detail' page.</p>
--	--

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility → Determination hyperlink

2.1.5 Security Updates

1. This page utilizes current MAGIDeterminationView rights in the MAGI View Security Group. The new 'Disposition hyperlink navigates to 'MAGI Disposition Detail' page and has the same rights.

2.1.6 Page Mapping

Update page mapping for the new column.

2.1.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.2 MAGI Referral Detail Page

2.2.1 Overview

The 'MAGI Referral Detail' page displays the case and eligibility information provided by CalHEERS on the DER. The page also displays status of the DER once the data is transferred to The Systems and when the DER is used in the Accepted and Saved EDBC.

The 'MAGI Referral Detail' page will now have a Disposition button for the User to view a list of Dispositions associated with a specified DER.

2.2.2 MAGI Referral Detail Page Mockup

The mockup shows a 'MAGI Referral Detail' page with a title bar and two buttons: 'Edit' and 'Close'. The main content area is divided into two sections. The top section displays case details in a grid format. The bottom section, titled 'Application', displays application-specific details in a grid format.

MAGI Referral Detail		
MAGI Case Number: 1010101010	MAGI Case Name: sandler	Initiated Date: 11/05/2020 4:48 PM
Origination: Service Center Representative	Determination ID: 4006119389	Dispositions
Case Number: X000000	Case Name: adam sandler	Request ID: 4113328008
Type: Referral	Status: * Reviewed	Covered CA Change: No
Run Reason: Intake	Benefit Month: 11/01/2020	Program: * Medi-Cal
Application		
Application Date: 11/05/2020	Primary Applicant/Recipient: sandler, adam 40M	Application Source: CalHEERS WEB Portal
Life Change Event: Permanently moved to/within California	Life Change Event Date: 11/05/2020	Requested Retro: No
Maintain Verifications: 5	Consent for Verifications: Yes	R&R Agreed: Yes
Signed Status/Date: Signed on 11/05/2020		

Figure 2.2.1 – 'MAGI Referral Detail' page with 'Dispositions' button

2.2.3 Description of Changes

1. Add 'Determination ID' field that displays the Determination ID to the right of 'Origination' field. Note: There are differences between C-IV and CalSAWS for the placement of the 'Origination' field. There are no changes to the C-IV placement. C-IV will inherit the CalSAWS display upon migration.
2. Add a button next to the 'Determination ID' field named, "Dispositions"
 - a. Clicking the 'Dispositions' button takes the User to the new 'MAGI Disposition List' page.
 - b. The button displays if there is a Disposition associated to the DER.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI→'Initiated Date' hyperlink

2.2.5 Security Updates

This page utilizes current MAGIReferralView rights in the 'MAGI View' Security Group. The new 'Dispositions' button navigates to 'MAGI Disposition List' page and has the same rights.

2.2.6 Page Mapping

Update page mapping for the new field.

2.2.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.3 MAGI Disposition List Page

2.3.1 Overview

The 'MAGI Disposition List' page displays a list of Dispositions associated to a DER. This list includes Medi-Cal, CalWORKs and CalFresh program Dispositions. This page is read-only and does not have edit capabilities.

2.3.2 MAGI Disposition List Page Mockup

MAGI Disposition List

Determination ID:
4006119389

Program:

Initiated Date
From: **To:** **View**

Search Results Summary **Results 1 - 4 of 4**

Initiated Date	Program	Status
07/15/2020 5:28 PM	Medi-Cal	Complete
06/05/2020 8:28 PM	CalWORKs	Complete
06/05/2020 8:28 PM	CalFresh	Complete
06/05/2020 8:28 PM	Medi-Cal	Complete

Figure 2.3.1 – ‘MAGI Disposition List’ page

2.3.3 Description of Changes

1. Create a new, view-only page named, 'MAGI Disposition List'. Format page similar to 'MAGI Referral Search' page with shaded sections and pagination standards.
2. On page load, the page loads the latest Dispositions sent for this DER where the newest displays first. The User can filter to view all Dispositions, or filter by 'Program', or by the date the Disposition was sent.
3. Add unnamed section with the following:

Field Label	Description
Determination ID	Displays the DER ID linked to the Disposition.

4. Add an unnamed filter section with the following:

Field Label	Description
Program	A drop-down menu with the following values: <ul style="list-style-type: none"> • <blank> • CalFresh • CalWORKs • Medi-Cal

	The field defaults to <blank> on page load.
Initiated Date From:	A date field and button. Date Field to enter date in format: MM/DD/YYYY Button is Date picker The field defaults to <blank> on page load.
To:	A date field and button. Date Field to enter date in format: MM/DD/YYYY Button is Date picker The field defaults to <blank> on page load.

5. Add a section named 'Search Results Summary' that includes standard pagination. The search results default sort by 'Initiated Date' in descending order.
 - a. Add the search results section with the following columns:

Column Label	Description
Initiated Date	This column is sortable. This represents the date the Disposition was sent. The Hyperlink will take the User to the 'MAGI Disposition Detail' page.
Program	This column is sortable. Name of Program for the Disposition
Status	This column is sortable. The value displays the latest status of the Disposition. Disposition Status options are: <ul style="list-style-type: none"> • Ready for Transfer • Complete • Error

6. Button

Field Label	Description
Close	The 'Close' Button closes the page and navigates to the prior page.

7. Add the standard Application for Monitoring Performance (AMP) bar to the bottom of the page.

2.3.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI→'Initiated Date' hyperlink→Disposition button

2.3.5 Security Updates

This page will have the same rights as the 'MAGI Referral Detail' page.

2.3.6 Page Mapping

Create Page Mapping for the new page.

2.3.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.4 MAGI Disposition Detail Page

2.4.1 Overview

The 'MAGI Disposition Detail' page displays the information sent in the Disposition transaction to CalHEERS. This page displays case information, program person eligibility details and the status of the Disposition.

2.4.2 MAGI Disposition Detail Page Mockup

MAGI Disposition Detail

Close

MAGI Case Number: 1010101010	MAGI Case Name: LANITA Test	Determination ID: 4006119389
Case Number: X000000	Case Name: LANITA Test	
Type: Disposition	Status: Error	

▼ Case Members

Name	MEDS PN	Program	Program Status	Aid Code	Override Reason	Dates
Test, LANITA 45F	01	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, WILLENE 45M	04	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, CHIQUITA 12F	03	Medi-Cal	Ineligible		Admin Decision / ALJ Ruling	8/1/2020 -
Test, BURTON 00M	02	Medi-Cal	Eligible	P9	Program/Regulation Not Implemented	8/1/2020 - 8/31/2020

View Associations

Worker Information

Worker ID:
19DP606F02

Status History

Status	Status Date	Initiated By
Error	06/02/2020 3:59 PM	249763
Complete	06/02/2020 2:30 PM	583742
Ready for Transfer	06/02/2020 2:30 PM	583742

Close

Figure 2.4.1 – ‘MAGI Disposition Detail’ page with ‘Error’ status

MAGI Disposition Detail

Close

MAGI Case Number: 1010101010	MAGI Case Name: LANITA Test	Determination ID: 4006119389
Case Number: X000000	Case Name: LANITA Test	
Type: Disposition	Status: Complete	

Case Members

Name	MEDS PN	Program	Program Status	Aid Code	Override Reason	Dates
Test, LANITA 45F	01	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, WILLENE 45M	04	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, CHIQUITA 12F	03	Medi-Cal	Ineligible		Admin Decision / ALJ Ruling	8/1/2020 -
Test, BURTON 00M	02	Medi-Cal	Eligible	P9	Program/Regulation Not Implemented	8/1/2020 - 8/31/2020

View Associations

Worker Information

Worker ID:
19DP606F02

Status History

Status	Status Date	Initiated By
Complete	06/02/2020 2:30 PM	249763
Ready for Transfer	06/02/2020 2:30 PM	583742

Close

Figure 2.4.2 – ‘MAGI Disposition Detail’ page with ‘Complete’ status

2.4.3 Description of Changes

1. Create a new, view-only page named, 'MAGI Disposition Detail'
2. The header section will have the following fields:

Field Label	Description
MAGI Case Number	Displays the CalHEERS Case Number.
MAGI Case Name	Displays the CalHEERS Case Name as provided by CalHEERS
Determination ID	Displays the DER ID linked to the Disposition. CH_Transact_Info.Det_Resp_Num_Identif
Case Number	Displays the System Case Number. The hyperlink opens the 'Case Summary' page for the Case Number.
Case Name	Displays the System Case Name.
Type	Displays the type of Transaction
Status	Displays the latest status for the Disposition. When the Status is 'Error', the status 'Error' is a hyperlink and opens the 'MAGI Disposition Error Detail' page.

3. The 'Case Members' section will have the following fields:

Field Label	Description
Name	Displays the Applicant/Recipient's Name Displays in standard name format: "Last Name, First Name Age Gender"
MEDS PN	Displays the MEDS Person Number
Program	Displays the Program Name Program Name options are: <ul style="list-style-type: none"> • CalFresh • CalWORKs • Medi-Cal
Program Status	Displays the Program Status Program Status options are: <ul style="list-style-type: none"> • Eligible • Ineligible • Discontinue
Aid Code	Displays the Aid code granted in the EDBC

Override Reason	Displays the Override Reason, if appropriate
Dates	Displays the Effective Dates of Eligibility

4. Display the 'View Associations' button within the Case Members section.

Button Label	
View Associations	Clicking the 'View Associations' button opens the 'Person Association List' page.

5. The 'Worker Information' section will have the following fields:

Field Label	Description
Worker ID	Displays the Worker ID assigned to the Medi-Cal program at the time the Disposition is created.

6. The 'Status History' section will have the following fields:

Field Label	Description
Status	Displays each Disposition Status sorted in descending order with the newest status on top. Disposition Status options are: <ul style="list-style-type: none"> • Ready for Transfer • Complete • Error
Status Date	Displays the date the status change occurred.
Initiated By	Displays the Staff ID who initiated the status change. The hyperlink takes User to the 'Staff Detail' page.

7. Button

Field Label	Description
Close	The 'Close' Button closes the page and navigates to the prior page.

8. Add the standard AMP bar to the bottom of the page.

2.4.4 Page Location

- **Global:** Case Info
 - **Local:** e-Tools
 - **Task:** MAGI→'Initiated Date' hyperlink→Disposition button→'Initiated Date' hyperlink
- Or

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility → 'Determination' hyperlink → Disposition Status hyperlink

2.4.5 Security Updates

1. This page will have the same rights as the 'MAGI Referral Detail' and 'MAGI Determination Detail' pages.

2.4.6 Page Mapping

Create Page Mapping for the new page.

2.4.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.5 Person Association List Page

2.5.1 Overview

The 'Person Association List' page displays the case members included in the Disposition or EDR transaction. The page displays the linkage of The Systems person to the CalHEERS person.

2.5.2 Person Association List Page Mockup

Person Association List

Close

MAGI Case Number:
1010101010

▼ **Persons included in the Disposition**

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN	
Test, Lanita	01	Test, Lanita	01	View Details
Test, Carson	03	Test, Willene	02	View Details

Close

Figure 2.5.1 – 'Person Association List' page

2.5.3 Description of Changes

1. Update the 'Person Association List' page to be a dynamic page that displays the person association from either an EDR or a Disposition.
2. Update the section name label dynamically based on the type of transaction.
 - a. The section label reads, "Persons included in the Request" when the information is from an EDR transaction.
 - b. The section label reads, "Persons included in the Disposition" when the information is from a Disposition transaction.
3. Update 'CalSAWS Person' (or 'C-IV Person') to display the name of the person as follows:
 - a. If the information is from a pending EDR transaction or Disposition, display the information from the Individual demographics page.
 - b. If the information is from an EDR transaction already sent, display the information sent in the EDR.
4. Update the row that displays the CalHEERS person information to display the CalHEERS person information as follows:
 - a. If the information is from a pending EDR transaction, display the person information from the latest DER received.
 - b. If the information is from an EDR transaction already sent, display the person information from the latest DER received prior to the EDR sent date.
 - c. If the information is from a Disposition transaction, display the person information from the DER associated to the Disposition.

2.5.4 Page Location

- **Global:** Case Info
 - **Local:** e-Tools
 - **Task:** MAGI→'Initiated Date' hyperlink→Disposition button→'Initiated Date' hyperlink→MAGI Disposition Detail→Person Associations button
- Or**
- **Global:** Eligibility
 - **Local:** Customer Information
 - **Task:** MAGI Eligibility→'Determination' hyperlink→Disposition Status hyperlink→MAGI Disposition Detail→Person Associations button

2.5.5 Security Updates

No changes.

2.5.6 Page Mapping

No changes.

2.5.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.6 Person Association Detail Page

2.6.1 Overview

The 'Person Association Detail' page displays the details for each linked person on the EDR or Disposition transaction. The Systems person details are based on the information in Individual Demographics or on the EDR and the CalHEERS person details are from the latest DER.

2.6.2 Person Association Detail Page Mockup

Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	Lanita Test	08/08/1980	123-45-6789	123456789F
CalHEERS	01	Lanita Test	08/08/1980	123-45-6789	123456789F

Figure 2.6.1 –Person Association Detail page – Mockup

2.6.3 Description of Changes

1. Update the 'Person Association Detail' page to be a dynamic page that displays the person association from both an EDR and a Disposition transaction.
2. Update the row that displays The System person information (CalSAWS or C-IV) to display the person information as follows:
 - a. If the information is from a pending EDR transaction or Disposition, display the information from the Individual demographics page.
 - b. If the information is from an EDR transactions already sent, display the information sent in the EDR.
3. Update the row that displays the CalHEERS person information to display the CalHEERS person information as follows:
 - a. If the information is from a pending EDR transaction, display the person information from the latest DER received.
 - b. If the information is from an EDR transaction already sent, display the person information from the latest DER received prior to the EDR sent date.

- c. If the information is from a Disposition transaction, display the person information from the DER associated to the Disposition.

2.6.4 Page Location

- **Global:** Case Info
 - **Local:** e-Tools
 - **Task:** MAGI→'Initiated Date' hyperlink→Disposition button→'Initiated Date' hyperlink→MAGI Disposition Detail→Person Associations button→'View Details' button
- Or**
- **Global:** Eligibility
 - **Local:** Customer Information
 - **Task:** MAGI Eligibility→'Determination' hyperlink→Disposition Status hyperlink→MAGI Disposition Detail→Person Associations button→'View Details' button

2.6.5 Security Updates

No changes.

2.6.6 Page Mapping

No changes.

2.6.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.7 MAGI Disposition Error Detail Page

2.7.1 Overview

The 'MAGI Disposition Error Detail' page displays the error information received from CalHEERS on a Disposition. This page is read-only and does not have edit capabilities.

2.7.2 MAGI Disposition Error Detail Mockup

MAGI Disposition Error Detail Close

Message Type: Disposition	Disposition ID: 12365412364	Message Received Date: 06/02/2020 2:30 PM
Case Number: L000206	MAGI Case Number: 5008582126	Sent By Batch: No

Error Details

Unique Error ID:	Common Error ID:	Message Processed Date: 06/02/2020 3:59 PM
-------------------------	-------------------------	--

Error Message:
VALIDATION ERROR : CalHEERS cannot process the Disposition. CalHEERS case is closed.

Close

Figure 2.7.1 – 'MAGI Disposition Error Detail' page

2.7.3 Description of Changes

1. Update the 'MAGI Request Error Detail' page to be a dynamic page that will display errors received as Logging transactions (Business Validations) from CalHEERS for both EDRs and Dispositions.
 - a. Update the page name to read, 'MAGI Request Error Detail' when the error is associated to an EDR.
 - b. Update the page name to read, 'MAGI Disposition Error Detail' when the error is associated to a Disposition.
2. Update the header section to have the following dynamic fields depending on the Message Type:

Field Label	Description
Message Type	A display of the type of message. <ul style="list-style-type: none"> Display 'Determination Request' when the error is associated to an EDR transaction. Display "Disposition" when the error is associated to a Disposition transaction.
Disposition ID	A dynamic display of the Disposition ID number if the error is associated to a Disposition transaction. This field is hidden if the error is associated to an EDR transaction.

Request ID	<p>A dynamic display of the Request ID number if the error is associated to an EDR transaction. The hyperlink will open the MAGI Request Detail page for the Request ID.</p> <p>Note: This is the current label on the 'MAGI Request Error Detail' page. This field is hidden if the error is associated to a Disposition transaction.</p>
------------	--

Note: The remaining field labels in the header and 'Error Details' sections are unchanged. The values display based on the error transaction received from CalHEERS.

2.7.4 Page Location

- **Local:** e-Tools
- **Task:** MAGI → 'Initiated Date' hyperlink → Disposition button → 'Initiated Date' hyperlink → 'Error' status hyperlink
- **Or**
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility → 'Determination' hyperlink → Disposition Status hyperlink → 'Error' status hyperlink

2.7.5 Security Updates

No changes.

2.7.6 Page Mapping

Update page mapping for the new field.

2.7.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.8 eHIT

2.8.1 Overview

eHIT logic will now include an 'Override Reason' in the Disposition transaction for the Medi-Cal program when appropriate. The eHIT Override Reasons are: Administrative Decision/ALJ ruling, CalHEERS/SAWS Defect,

and Policy Not Implemented. Deemed Infant EDBC budget types will map to eHIT Override Reason 'Program/Policy Not Implemented'.

The eHIT logic will only send a Disposition for the DER used in the Accepted and Saved EDBC for a benefit month and all prior DERs for the same EDBC benefit month with latest status 'Reviewed' will update to 'Suppressed'. The Disposition transaction will now send the MAGI Medi-Cal primary aid code, program status and effective dates in addition to the current logic which sends this for Non-MAGI Medi-Cal, CalWORKs and CalFresh.

The eHIT logic will only send a CalFresh Disposition once as a response to the CalFresh referral and a DER will not be marked with 'Complete' status when a Disposition is for CalFresh or CalWORKs.

Note: The Technical changes for eHIT Schema updates are documented in SCRs CA-217624 | CIV-107530 (CalHEERS eHIT: Update Interface Schema to version 17) in the same release as this SCR.

2.8.2 Description of Change

1. Update eHIT Disposition logic to always include the ProgramReferralDetails node for each individual when sending a Disposition for an Accepted and Saved Regular EDBC.

The ProgramReferralDetails node includes the following elements:

- a. Referral Program Type Code: (Required)
 - CalWORKs (CW)
 - CalFresh (FS)
 - Medi-Cal (MC) –includes Non-MAGI and MAGI Medi-Cal
- b. Referral Status Code:
 - Processed (PR)
- c. Referral Status Date: Date the EDBC was Accepted and Saved.
- d. Aid Code: Primary Aid Code if Active MEM or MMO If the individual is active on more than one aid code, send the primary aid code. If the individual is on more than one aid code and there is no primary aid code, send status IE without an aid code. (This is for the rare case of them having only a secondary and special segment aid code.)
- e. Program Status Code:
 - Eligible (EL) – used to communicate Active MEM on Medi-Cal, CalWORKs and CalFresh. Also includes Active MMO in CalWORKs.
 - Ineligible (IE) – used to communicate Denial in Medi-Cal, CalWORKs or CalFresh.
 - Discontinued (DS)
- f. SAWS Override Reason Code per individual:

eHIT Code	Description
ALJ	Admin Decision / ALJ Ruling
DEF	CalHEERS / SAWS Defect
PNI	Program/Regulation Not Implemented

See 2.8.2.4 for population logic

- g. Program Period Range - Begin Date: Benefit month of the EDBC. For infants born in the EDBC month, use the infant's DOB.
- h. Program Period Range - End Date: End date of the eligibility. Use eHIT high-date for high-dated EDBCs. Populate with last day of benefit month if the EDBC is a one-month EDBC.

Note: Only one 'Program Referral Details' node is sent per person, per Disposition; a separate Disposition is sent for each 'Referral Program Type Code' when Regular EDBC is Accepted and Saved for more than one program type at the same time.

For example: A Medi-Cal and CalWORKs EDBC is Accepted and Saved for a case, the System would send two Disposition transactions; one Disposition for all Medi-Cal eligibility and one Disposition for all CalWORKs eligibility.

Technical Note: The eHIT logic that determines if an Accepted and Saved Medi-Cal or CalWORKs EDBC triggers a Disposition is not changing. The eHIT logic that sends multiple Dispositions for the same single EDBC is updated with 2.8.2.5. The eHIT logic that sends CalFresh Dispositions is updated with 2.8.2.2.

2. Update eHIT logic to send a Disposition for the CalFresh program when the first CalFresh Regular EDBC is Accepted and Saved after receiving a DER with a Referral for CalFresh. This will communicate to CalHEERS that the CalFresh referral was processed and include the CalFresh eligibility. Further changes to CalFresh will no longer be communicated to CalHEERS via a Disposition unless a new Referral is received from CalHEERS for CalFresh.
3. Update eHIT logic to no longer update the status of the DER from 'Reviewed' to 'Complete' based on a Disposition for the CalFresh or CalWORKs programs; the DER status will only change based on the Disposition for the Medi-Cal program.
4. Update eHIT logic to send a SAWS Override Reason Code for the appropriate individual in the EDBC when a User overrides the Medi-Cal EDBC based on the following mappings:

EDBC Override Reason Code (CT325)	eHIT SAWS Override Reason Code
Administrative Decision	Admin Decision / ALJ Ruling
Aid Paid Pending	Admin Decision / ALJ Ruling
CalWORKs Family Reunification	Program/Regulation Not Implemented
CF Student-Child Care Exception Erroneous Calculation	CalHEERS/SAWS Defect
COVID-19	Program/Regulation Not Implemented
CW POI - 1 Month Suspense	Program/Regulation Not Implemented
Erroneous Calculation	CalHEERS/SAWS Defect
Hearing Decision	Admin Decision / ALJ Ruling
Hunt v. Kizer	Program/Regulation Not Implemented
Incorrect Configuration	CalHEERS/SAWS Defect
ISM Adjustment	Program/Regulation Not Implemented
LTC Allocation	Program/Regulation Not Implemented
Manual EDBC Program	Program/Regulation Not Implemented
MC POI - Sneed Member/MBU	Program/Regulation Not Implemented
Month prior to C-IV/LRS	Program/Regulation Not Implemented
New Policy	Program/Regulation Not Implemented
Regulation Change	Program/Regulation Not Implemented
Retro CW/CF	Program/Regulation Not Implemented
Saldivar	Admin Decision / ALJ Ruling
Unable to Complete Conversion	CalHEERS/SAWS Defect
Vital Statistics	Program/Regulation Not Implemented

Exception: If a Deemed infant is protected on either one of the 'Deemed Protection without SOC' or 'Deemed Protection with SOC' EDBC budgets in the Accepted and Saved Regular EDBC, send SAWS Override Reason Code of "Program/Regulation Not Implemented" for the Deemed Infant. Always send this SAWS Override Reason Code when the Medi-Cal EDBC protects the Deemed Infant on either 'Deemed Protection without SOC' or 'Deemed Protection with SOC' budget, regardless if the User performs a Medi-Cal EDBC override or not.

5. Update eHIT logic to no longer send a Disposition for the additional prior DERs with the same benefit month as the EDBC Benefit month when they are not used in the EDBC. The eHIT logic that determines if an Accepted and Saved Regular Medi-Cal EDBC triggers a Disposition is not changing.
 - a. Update eHIT logic to update the DER status to 'Suppressed' for the DERs for which a disposition was not sent in the above scenario. See Figure 3.

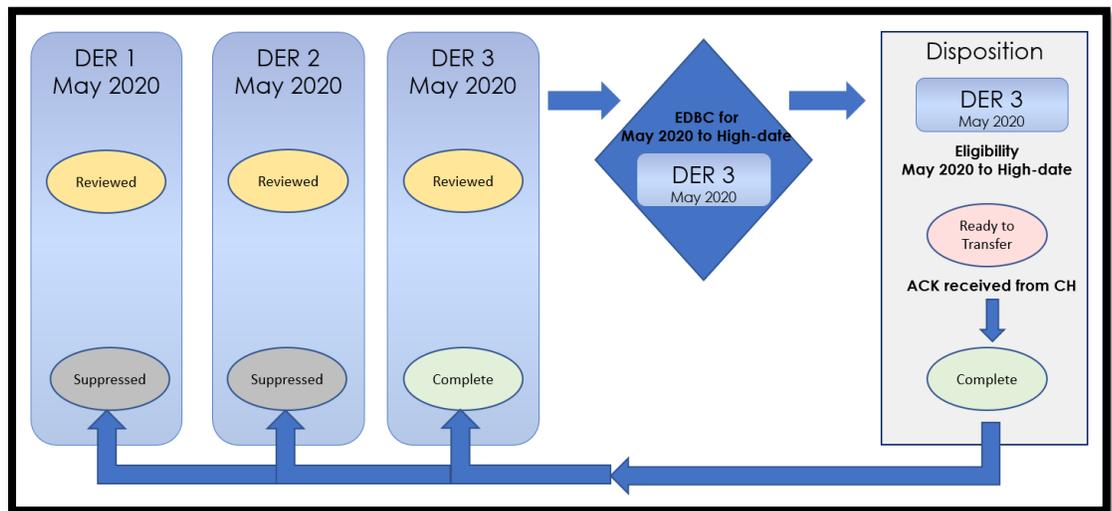


Figure 3- New Logic- Multiple DERs for one Benefit Month

6. Update eHIT logic to send a Disposition for the DER used in EDBC when the Accepted and Saved Regular EDBC benefit month does not match the DER's benefit month if the DER status is 'Reviewed'.
 - a. Update eHIT logic to update the status for all prior DERs for the same benefit month as the DER used in EDBC to 'Suppressed' for the DERs for which a disposition was not sent in the above scenario. See Figure 4.

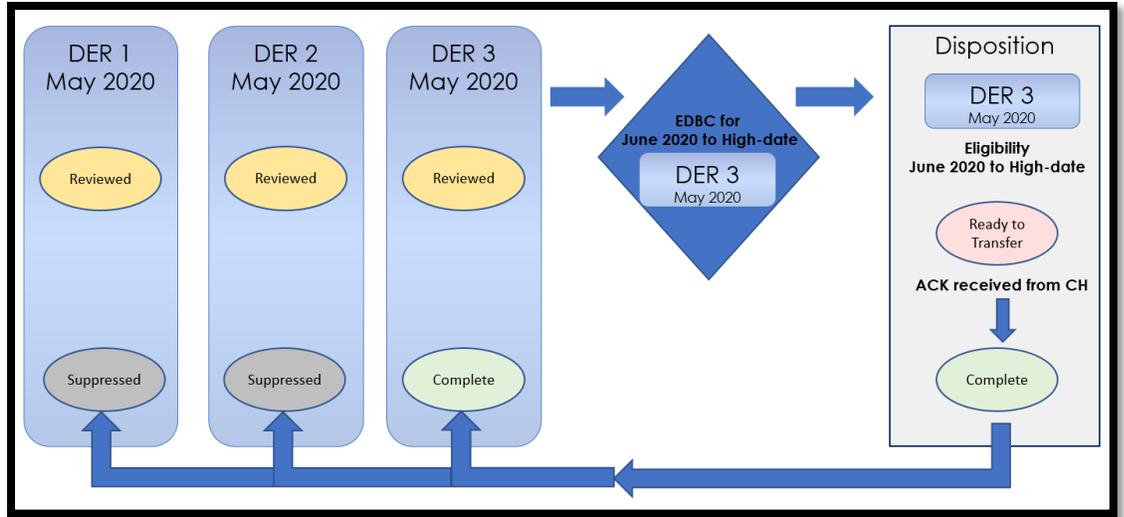


Figure 4- New Logic- EDBC Benefit Month does not match DER Benefit Month

2.8.3 Interface Partner

CalHEERS

2.8.4 eHIT Schema Version

eHIT Schema version 17

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1		Security Matrix	 CA 214686 CIV 106814 BREfS Securit

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.9	The LRS shall display summary and detailed interface LRS Data that has been received from external systems, as specified by COUNTY.	LRS will display the Disposition information and any resulting errors if the transaction fails.

CalSAWS

California Statewide Automated Welfare System

Design Document

CIV-783

Replace Document Enclosure Adobe Flash as
it's no longer supported

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/17/2020	1.0	Initial Document	Jasmine Chen
10/23/2020	1.1	Updated Design per latest information	Jasmine Chen

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Document Enclosure Detail page	5
	2.1.1 Overview	5
	2.1.2 Mockup	5
	2.1.3 Description of Changes	5
	2.1.4 Page Location	5
	2.1.5 Security Updates.....	5
	2.1.6 Page Mapping.....	5
	2.1.7 Page Usage/Data Volume Impacts	5

1 OVERVIEW

1.1 Current Design

Currently C-IV's Document Enclosure Detail page uses the Adobe Flash tool (SWFUpload) for its enclosure file upload functionality.

Other systems of CalSAWS, YBN, and C4Y do not use the Adobe Flash tool. Instead, their file upload functionality uses file-input tags.

1.2 Requests

As Adobe Flash will no longer be supported by January 01, 2021, request to replace this tool in C-IV with file-input tags for any file upload functionality.

1.3 Overview of Recommendations

1. For the C-IV Document Enclosure Detail page's file upload functionality, replace its Adobe Flash tool with file-input tags.

1.4 Assumptions

1. There are no front-end changes. The Document Enclosure Detail page's functionality remains the same.
2. Implementation of file-input tags will allow the page to upload one pdf file at a time.

2 RECOMMENDATIONS

2.1 Document Enclosure Detail page

2.1.1 Overview

Currently C-IV's Document Enclosure Detail page uses the Adobe Flash tool for its file upload functionality. This tool will be replaced with file-input tags because Adobe Flash will no longer be supported by 2021.

2.1.2 Mockup

N/A as there are no front-end changes.

2.1.3 Description of Changes

1. Replace the Adobe Flash tool with file-input tags for files to be uploaded to the C-IV Document Enclosure Detail page.

Note: When uploading a file, the File Browser dialog window may look different per operating system.

2.1.4 Page Location

- **Global:** Document Control
- **Local:** Documents
- **Task:** Enclosure

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A