

[CIV-107701] CalHEERS eHIT: Update mapping for Tuition and Fees deduction in EDR

Team Responsible:	CalHEERS	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[21.06]	Designer Contact:	Renee Gustafson	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	34
Reporter:	Renee Gustafson	Regulation Reference:	ACWDL 20-XX	Created:	08/03/2020 03:58 PM
Status:	Design in Progress	Impact Analysis:	[N/A]	Outreach Required:	
Policy/Design Consortium Contact:	Maureen Votta	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	CO-103
Committee:	[Medi-Cal/CMSP]	Approved by Committee:		Other Agency Cross Reference:	CA-218380; CH-164543

Non-Committee

Review:

Expedite Approval:

Current Design:

ACWDL 19-14 provided guidance regarding changes to specific income and deduction types for Modified Adjusted Gross Income (MAGI) Medi-Cal based on the Tax Cuts and Jobs Act (TCJA). The allowance of 'Tuition and fees paid by individual (not paid by financial aid)' as a deduction was extended through tax year 2017 as a part of the Bipartisan Budget Act expired in tax year 2018. The TCJA did not reauthorize this deduction and thus 'Tuition and fees paid by individual (not paid by financial aid)' is no longer an allowable deduction for MAGI Medi-Cal or Covered California Programs.

In Release 19.03, C-IV was updated with CIV-103003 to no longer send 'Tuition and fees paid by individual (not paid by financial aid)' as a deduction in the EDR for benefit months 01/2019 or later.

Note: CalHEERS no longer displays 'Tuition and Fees' as a deduction in the online portal effective CalHEERS release 18.10.2

C-IV sends a deduction in an EDR when the following criteria is met:

A. If the EDR benefit month is 01/2019 or later:

- Expense Amount Detail and Contributor records End Date is on or after 01/01/2014
- Expense Amount Detail and Contributor records begin on or before the last day of the EDR benefit month
- The Expense Type is mapped to a CalHEERS Deduction Type
- The Expense Type is none of the following:
 - o Tuition and fees paid by individual (not paid by financial aid)
 - o Domestic production activities

B. If the EDR benefit month is 12/2018 or prior:

- Expense Amount Detail and Contributor records begin on or before the last day of the EDR benefit month
- Expense Amount Detail and Contributor records End Date is on or after 01/01/2014
- The Expense Type is mapped to a CalHEERS Deduction Type

Note: eICT shares the CalHEERS deduction code to determine what to send in eICT transactions. This means that any changes to the CalHEERS deduction code will be reflected in the deductions sent for any future eICT transaction.

Request:

Per ACWDL 20-XX, 'Tuition and fees paid by individual (not paid by financial aid)' is a countable deduction again for the MAGI Medi-Cal and Covered California programs effective 01/01/2020.

With CalHEERS Change Request 164543, CalHEERS will update their Business Rules Engine (BRE) to consider 'Tuition and fees paid by individual (not paid by financial aid)' as a countable deduction for MAGI Medi-Cal and Covered California Programs in benefit months prior to 01/2019 or benefit months 01/2020 or later.

C-IV will no longer filter out 'Tuition and fees paid by individual (not paid by financial aid)' in an EDR depending on the benefit month and instead CalHEERS BRE will determine when to count as a deduction or not.

Recommendation:

C-IV will send a deduction in an EDR when the following criteria is met:

A. If the EDR benefit month is 01/2019 or later:

- Expense Amount Detail and Contributor records End Date is on or after 01/01/2014

- Expense Amount Detail and Contributor records begin on or before the last day of the EDR benefit month
 - The Expense Type is mapped to a CalHEERS Deduction Type
 - The Expense Type is none of the following:
 - o Domestic production activities
- B. If the EDR benefit month is 12/2018 or prior:
- Expense Amount Detail and Contributor records begin on or before the last day of the EDR benefit month
 - Expense Amount Detail and Contributor records End Date is on or after 01/01/2014
 - The Expense Type is mapped to a CalHEERS Deduction Type

Outreach

Description:

Migration Impact

Description:

Joint design has been approved through the Medi-Cal Committee. LRS/CalSAWS will implement this Change with SCR CA-218380 in the 21.02 release.

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate: 34

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	17	CalHEERS Test :	12	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0