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CalSAWS | Batch Memorandum Call for 2021 FPL COLA

Date: February 16, 2021	Regulation: ACWDL 21-01
Time: 2:00PM-4:00PM	Meeting Called by: CalSAWS
Attendees: PPOCs, RMs, MC/CMSP Committee Members, CalSAWS	

Memorandum Purpose

This memorandum is intended to convey the batch EDBC scope, county actions and schedule for the 2021 Federal Poverty Level (FPL) Cost of Living Adjustments (COLA) Batch.

Scope

On February 23,2021, SCRs CA-223627 and CIV-108496 implemented the following changes to production:

- Updated the existing FPL values in the Systems to the new values effective 4/1/2021.
- Updated the FPL values for Medicare Savings Program (MSP) budgets when no Member, FRI or FRE in the budget has Title II Retirement Survivors and Disability Insurance (RSDI) Income valid for the month. There will be one new value for Qualified Medicare Beneficiary (QMB), one for Specified Low-Income Medicare Beneficiary (SLMB) and one for Qualified Individual (QI)-1. These values will be effective 1/1/2021.
- Updated the FPL values for MSP budgets when there is a Member, FRI or FRE in the budget with RSDI Income valid for the benefit month. There will be one new value for QMB, one for SLMB and one for QI-1. These values will be effective 3/1/2021.
- Updated records with Medicare Part B Premium amount to $148.50 for records with current amount less than $144.60 and Payment Method as 'State'.

Batch

To minimize the work required by the counties, the Systems will take the following actions for the new 2021 FPL values with SCR CA-223624 and CIV-108495 in release 21.03.13:

- Run batch EDBC for the months of January 2021 and February 2021 for all Active Medi-Cal programs that meet the following requirements:
    - There is a Regular EDBC for the program for the month being run where there exists at least one person receiving aid from MSP: QMB, SLMB, or QI-1.
    - None of the persons receiving aid from MSP receives RSDI income.
    - If MAGI has been requested on the case, an EDBC has been ran against at least one Determination.
    - Medi-Cal EDBC has not been processed for January 2021 and February 2021 since updated 2021 FPL values have been deployed to production with CA-223627 and CIV-108496.
    - **CalSAWS only** - The program is not assigned to a DCFS worker.
- Run batch EDBC for the month of March 2021 for all Active Medi-Cal programs that meet the following requirements:

- There is a Regular EDBC for the program for the month being run where there exists at least one person receiving aid from MSP: QMB, SLMB, or QI-1.
- If MAGI has been requested on the case, an EDBC has been ran against at least one Determination.
- Medi-Cal EDBC has not been processed for March 2021 since updated 2021 FPL values have been deployed to production with CA-223627 and CIV-108496.
- **CalSAWS only** - The program is not assigned to a DCFS worker.

- Run batch EDBC for the month of April 2021 for Active Medi-Cal that meet the following requirements:
  - There exists at least one person on the program receiving Non-MAGI Medi-Cal aid.
  - If MAGI has been requested on the case, an EDBC has been ran against at least one Determination.
  - There does not exist any person on the Medi-Cal program receiving aid with an Express Lane aid code.
  - Medi-Cal EDBC has not been processed for April 2021 since updated 2021 FPL values have been deployed to production with CA-223627 and CIV-108496.
  - **CalSAWS only** - The program is not assigned to a DCFS worker.

For the above three EDBC batch populations, C-IV runs with 'FPL COLA' (CT744 FP) run reason and CalSAWS runs with 'MC FPL COLA' (CT744 ML) run reason.

- Run Batch EDBC January 2021 through and including April 2021 with 'SSA COLA' Run Reason for SSA COLA Medi-Cal cases updated with SCR CA-223627/CIV-108496 having existing Medicare Part B Premium amount less than $144.60 and payment method as 'State'.

List Details

Lists will be posted on March 15, 2021, to aid the counties to review the cases to verify accurate action was taken after Batch EDBC completes. The lists will be available to the counties at the following locations:

C-IV - ██
CalSAWS - ██

The listings will consist of below standard columns:

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

1. ## List Name: Closed Program

    A list of cases in which Batch EDBC resulted in the closure of the Medi-Cal program. Counties can use this list to verify that the program's discontinuance is appropriate. If available, display the closure reason (for example: Calif. Residence).

    Additional Columns: Closure Reason, Benefit Month
    County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.

2. ## List Name: Closed Individual

    A list of cases in which Batch EDBC resulted in an individual being discontinued from Medi-Cal but the Medi-Cal program remains open. Counties can use this list to verify that the individual's discontinuance is appropriate. If available, display the closure reason.

    Additional Columns: Individual Name, CIN, Closure Reason, Benefit Month
    County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close individuals, review these cases to verify the closure was accurate.

3. **List Name: Read-Only EDBC**
   A list of cases in which Batch EDBC resulted in a Read-Only Medi-Cal EDBC with all the Read-Only Reasons except the Read-Only Reason of "Protection due to Public Health Crisis/Natural Disaster". Counties can use this list to run Medi-Cal EDBC for those cases and take the appropriate action. For additional column, "MAGI RE DER," the value will be 'Y' if the latest DER for the benefit month is a Batch Renewal (RE) DER with at least one person MAGI Pending; otherwise, 'N'.

   Additional Column(s): Read-Only Reason, Benefit Month, MAGI RE DER
   County Action: Since Batch EDBC couldn't automatically apply the intended change to these cases, users may process EDBC to apply intended changes if applicable.

4. **List Name: MAGI Run with EDBC Never Linked**
   A list of cases that were excluded from Batch EDBC processing because the Medi-Cal program had requested a MAGI Determination, but Medi-Cal EDBC never ran against any MAGI Determination on the case.

   Additional Column(s): none
   County Action: In this situation, a user has never run EDBC to establish the CalHEERS link for this case. To avoid having Batch EDBC processing do so automatically, these cases were not processed. For cases in this list, run Medi-Cal EDBC to apply the FPL COLA Changes, taking note that this EDBC will establish the link to CalHEERS.

5. **List Name: Batch EDBC skipped with a reason**
   A list of cases in which Batch EDBC was skipped, including the reason for the skip. These cases will be the responsibility of the worker to address.

   Additional Column(s): Skip Reason, Benefit Month
   County Action: Batch could not process these cases because of the skip reasons listed in the list. Review each case and take appropriate action based on the skip reason.

6. **List Name: Denials and Discontinuance for January - April 2021**
A list of cases for individuals that were denied or discontinued prior to the 2021 FPL value updates although may be eligible with the latest updated 2021 FPL values.

Additional Column(s): Individual Name, CIN, Benefit Month
County Action: Review all denials and discontinuances and re-evaluate eligibility based on the 2021 FPL values.
Criteria:
   i.   Medi-Cal EDBC was processed for any month January 2021 through and including April 2021 prior to the updated 2021 FPL values (CA-223627/CIV-108496) is deployed.
   ii.   One of the following failed income budgets exists in the EDBC:
         - QMB
         - SLMB
         - QI-1
         - ABD FPL
         - 250% Working Disabled
   iii. There is a denied or discontinued individual who is also in one of the failed income budgets identified above.
   iv.   The Income value of the failed budget is less than the 2021 FPL value for the appropriate effective month. (Refer to the Technical Note)
   v.   There is a latest EDBC processed for the denied or discontinued individual for any of the months January 2021 through and including April 2021. (Refer to the Technical Note for budget type corresponding to the benefit month).
   vi.   **CalSAWS only**: The program is not assigned to a DCFS worker.

Technical Note: The "Total net non-exempt income" value of the failed budget is less than the 2021 FPL "Maintenance Need" value.

Budget Type	FPL% reference
QMB	100% FPL
SLMB	120% FPL
QI-1	135% FPL
ABD FPL	100% FPL
250% Working Disabled	250% FPL

Please Note:
- Review cases included in the lists and take necessary action.
- Review the Batch Eligibility Report each morning and action cases which could not be processed. This report is an On Request report available under ███████████ ███████████████████████████ If you do not see this report, please contact your Security Administrator for rights. To see cases not processed, select a status of 'Not Processed' on the Reports Parameter pages.

Things to remember about this EDBC batch process

- For the January, February and March benefit months, batch will only run Active Medi-Cal programs with affected MSP programs. This year, programs with the Medicare Part B Premium updated will also run for January, February, March and April.
- In the scenario where multiple active Medi-Cal programs exist for one case, batch will run all active Medi-Cal programs on the case together. This ensures correct LTC allocation between the multiple programs. Batch will not run Non Medi-Cal programs.
- All impacts from Defects and SCRs that have not been implemented will continue to occur during the batch processing.
- The programs targeted for batch processing are determined once upfront. For batch processes that take more than one business day, cases are not removed or added to the batch processing based on user updates.
- The Batch EDBCs will have an EDBC Source of 'Batch EDBC Rules'.
- When a user runs EDBC in which a prior pending month exists, the EDBC will result in a Read-Only status. However, when running a Batch EDBC process, that restriction does not apply and these EDBCs will not be Read-Only.
- Any updates or lack of updates made/not made to cases will impact the Batch EDBC results. This means programs may be discontinued (due to non-compliances, etc.) unexpectedly.
- DHCS is coordinating implementation of the 2021 FPLs in the California Healthcare Eligibility Enrollment and Retention System (CalHEERS). DHCS anticipates the CalHEERS system will be updated with the annual 2021 FPL amounts on March 01, 2021.
- DHCS will send a notice to the MAGI Medi-Cal beneficiaries potentially impacted by the change to inform them of the FPL increase to allow them an opportunity to request a re-evaluation from the county.
- When the batch process starts,
  - The Ad-Hoc reporting database will have the updates by 6:00 AM, Monday, March 15, 2021
  - Both systems will transfer MEDS file to MEDS as per the usual process.
    - C-IV and CalSAWS transfers the file by Sunday, March 14, 2021; but MEDS will not process the file until 3:00 pm on Monday, March 15, 2021. This is the normal process for the files sent over the weekend.
  - NOAs will be sent to Central Print at night through the regular nightly batch process.
- No changes to existing Medi-Cal NOA functionality.

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Development Schedule

Date	Task
February 26, 2021	Deliver the changes to the System Test team
March 01, 2021	Start System Testing the changes
February 16, 2021	Review the Batch process schedule with counties (Memorandum Call)
March 13, 2021	Run Batch EDBC in production
March 15, 2021	Post lists to the CalSAWS ███████████████ ███████████████████████████████

Schedule Considerations
- Downtime
    - C-IV will be down on Saturday, March 13, 2021 to allow time for batch EDBC processing.
    - CalSAWS will not have any downtime due to FPL COLA batch.
    Please Note: Broadcast will be sent out that the CalSAWS will experience some slowness due to FPL COLA Batch Run.

- Scheduled Jobs
    - C-IV and CalSAWS: Jobs scheduled for Saturday, March 13, 2021 will run after FPL COLA batch completion.
- Approximate count of programs to be processed
    - Batch EDBC will run approximately below mentioned Medi-Cal EDBCs for the months of January 2021 through and including April 2021 for 2021 FPL COLA updates.

BENEFIT MONTH	C-IV	CalSAWS
January 2021	17,303	83,742
February 2021	17,279	83,431
March 2021	163,463	234,787
April 2021	314,051	422,814
TOTAL	**512,096**	**824,774**

    - Batch EDBC will run approximately below mentioned Medi-Cal EDBCs for the months of January 2021 through and including April 2021 for Medicare Part B Premium amount updates.

	C-IV	CalSAWS
TOTAL	**49,088**	**10,004**

- Batch processing speed
  - C-IV - EDBC batch can process approximately 50,000 programs per hour.
  - CalSAWS - EDBC batch can process approximately 60,000 programs per hour.
- Both C-IV and CalSAWS cannot run batch EDBC during the following:
  - Main Payroll
  - Foster Care Main Payroll
  - SAR7 Discontinuance
  - RE Discontinuance
  - 10-day Discontinuance
  - CalFresh Recertification Discontinuance
  - Primary Period of Maintenance (PPM)
    - C-IV – 6:30 AM – 9:00 PM, Monday through Saturday
    - CalSAWS – 6:30 AM – 8:00 PM, Monday through Saturday

Timeline

- Expected start of Batch EDBC processing
  - C-IV – March 13, 2021 - 6:00 AM
  - CalSAWS – March 13, 2021 – Regular Batch Operation hours
- Batch will include cases for all months starting January through and including April 2021.
- Expected completion of Batch EDBC processing
  - C-IV – March 13, 2021 - 4:00 PM
  - CalSAWS – March 13, 2021 – Regular Batch Operation hours

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C-IV Calendar for March 2021

SUN	MON	TUES	WED	THUR	FRI	SAT
	1 • MAGI RE Packet sweep (Daily M-S) • Mixed RE Packet (Daily M-S) • MAGI RE EDR sweep	2 • SAR 7 Disc	3	4	5	6
7	8	9	10 • Non-MAGI RE Packet	11	12 • NA 960X	13
14	15 • CW/CF RE Packets	16	17	18 • Ten-Day Disc/NA RE X	19	20
21	22	23	24	25 • Send SAR7/SAR2	26 • Main Payroll	27
28	29	30	31 • CW/CF Disc			

CalSAWS Calendar for March 2021

SUN	MON	TUES	WED	THUR	FRI	SAT
	1 • SAR7 Disc • MAGI RE EDR sweep	2	3	4 • CF/RE Appt 1	5 • CF/RE Appt 2	6
7	8	9	10 • MAGI RE Packet • Mixed RE Packet • Non-MAGI RE Packet • MC RE Packet	11	12 • NA 960X	13
14	15	16	17	18	19 • Main Payroll • Ten-Day Disc/NA RE X	20
21	22	23	24	25 • MC Reminder	26 • Send SAR7/SAR2	27
28	29	30	31 • CW/CF Disc			