

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-221711

Case Linkage between CalHEERS and SAWS

(CH-171387)

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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## Table of Contents

1	Overview .....	6
1.1	Current Design.....	6
1.2	Requests.....	7
1.3	Overview of Recommendations.....	8
1.4	Assumptions .....	9
2	Recommendations.....	10
2.1	CalHEERS-SAWS Search Interface – Functional Design.....	10
2.1.1	Overview .....	10
2.1.2	Description of Changes .....	10
2.1.3	Counties Impacted .....	11
2.1.4	Interface Partner.....	11
2.2	MAGI Case Search Page .....	11
2.2.1	Overview .....	11
2.2.2	MAGI Case Search Page Mockups .....	11
2.2.3	Description of Changes .....	16
2.2.4	Page Location .....	21
2.2.5	Security Updates.....	21
2.2.6	Page Mapping.....	22
2.2.7	Page Usage/Data Volume Impacts .....	22
2.3	MAGI Search Response Case Detail Page .....	23
2.3.1	Overview .....	23
2.3.2	MAGI Search Response Case Detail Page Mockup .....	23
2.3.3	Description of Changes .....	24
2.3.4	Page Location .....	30
2.3.5	Security Updates.....	31
2.3.6	Page Mapping.....	31
2.3.7	Page Usage/Data Volume Impacts .....	31
2.4	MAGI Search Response Person Detail Page .....	32
2.4.1	Overview .....	32
2.4.2	MAGI Search Response Person Detail Mockup .....	32
2.4.3	Description of Changes .....	33
2.4.4	Page Location .....	36

2.4.5	Security Updates.....	36
2.4.6	Page Mapping.....	37
2.4.7	Page Usage/Data Volume Impacts .....	37
2.5	MAGI Determination List Page .....	37
2.5.1	Overview .....	37
2.5.2	MAGI Determination List Detail Mockup.....	38
2.5.3	Description of Changes .....	39
2.5.4	Page Location .....	40
2.5.5	Security Updates.....	40
2.5.6	Page Mapping.....	40
2.5.7	Page Usage/Data Volume Impacts .....	40
2.6	MAGI Request Detail Page .....	41
2.6.1	Overview .....	41
2.6.2	MAGI Request Detail Page Mockup.....	41
2.6.3	Description of Changes .....	42
2.6.4	Page Location .....	43
2.6.5	Security Updates.....	43
2.6.6	Page Mapping.....	43
2.6.7	Page Usage/Data Volume Impacts .....	43
2.7	Person Association List Page .....	44
2.7.1	Overview .....	44
2.7.2	MAGI Referral Detail Page Mockup.....	44
2.7.3	Description of Changes .....	44
2.7.4	Page Location .....	44
2.7.5	Security Updates.....	45
2.7.6	Page Mapping.....	45
2.7.7	Page Usage/Data Volume Impacts .....	45
2.8	MAGI Referral Detail Page .....	45
2.8.1	Overview .....	45
2.8.2	MAGI Referral Detail Page Mockup.....	45
2.8.3	Description of Changes .....	46
2.8.4	Page Location .....	46
2.8.5	Security Updates.....	47
2.8.6	Page Mapping.....	47
2.8.7	Page Usage/Data Volume Impacts .....	47

2.9	CalHEERS-SAWS Search Interface .....	48
2.9.1	Overview .....	48
2.9.2	Description of Change .....	48
2.9.3	Execution Frequency.....	48
2.9.4	Key Scheduling Dependencies .....	48
2.9.5	Counties Impacted .....	49
2.9.6	Data Volume/Performance.....	49
2.9.7	Interface Partner.....	49
2.9.8	Failure Procedure/Operational Instructions.....	49
2.10	eHIT .....	50
2.10.1	Overview .....	50
2.10.2	Description of Change .....	50
2.10.3	Interface Partner.....	51
2.10.4	eHIT Schema Version .....	51
2.11	MAGI Search Emulator .....	52
2.11.1	Overview .....	52
2.11.2	Description of Change .....	52
2.12	Automated Regression Test.....	53
2.12.1	Overview .....	53
2.12.2	Description of Change .....	53
3	Supporting Documents .....	56
4	Requirements.....	56
4.1	Project Requirements.....	56

# 1 OVERVIEW

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The purpose of this document is to satisfy functional specification in support of changes with CalHEERS Change Request CH-171387 (Case Linkage: Phase I)

## 1.1 Current Design

When a CalSAWS user wants to review MAGI case, application, or person information known only to CalHEERS, the user must utilize the CalHEERS Web Portal search functionality because there is currently no way to search CalHEERS directly from CalSAWS.

CalSAWS and CalHEERS communicate case linkage between a CalSAWS case and a MAGI case via eHIT (Electronic Health Information Transfer) transactions. CalSAWS sends an Eligibility Determination Request (EDR) or Disposition to CalHEERS, and CalHEERS locks the linkage between the two systems' cases. When a Medi-Cal program is denied or discontinued, CalSAWS communicates that information through a Disposition transaction to CalHEERS. CalHEERS processes the Disposition and enables the County of Responsibility (COR) on the MAGI case in CalHEERS. However, CalHEERS will save the CalSAWS-MAGI Case linkage in history for a reapplication. CalHEERS allows reapplications from CalSAWS cases already established in history. When an individual reapplies on a closed MAGI case from a county not in the case history, CalHEERS requires the user to reapply from the CalHEERS Web Portal and send a DER-U to the new county. The user can establish the linkage to the CalSAWS case in the new county.

Likewise, CalSAWS also locks the linkage between the cases in the two systems per current requirements in eHIT. Once the CalSAWS-MAGI case linkage is established in a CalSAWS county, CalSAWS does not allow the user to link the MAGI case to any other CalSAWS case in the same county.

When CalHEERS is unable to process the Disposition transaction on a discontinued or denied MAGI case, the COR between the CalSAWS and MAGI case remains locked in CalHEERS. If the individual reapplies on that MAGI case on the CalHEERS web portal and moved to a new county, CalHEERS sends the Unsolicited Determination of Eligibility Response (DER-U) to the old county. In this instance, the user must follow an established COR enablement process outside of the systems through a submission of a CalHEERS help desk ticket. The user then submits a Report a Change (RAC), and the DER-U is sent to the correct County.

CalSAWS allows a user to specify CalSAWS-CalHEERS person association information before sending an EDR, when needed, but CalHEERS will only accept the CalSAWS-CalHEERS person associations they already have established for the CalSAWS-CalHEERS linked case.

When an individual applies for health insurance through the CalHEERS Web Portal, the individual can choose the county in which they reside. CalHEERS assigns the MAGI case's County of Responsibility (COR) based on the residence county for the primary applicant. CalHEERS will send a DER-U to the assigned COR. If the CalSAWS user determines the COR is not correct, the user is required to process the DER-U as a courtesy application, then complete the Inter County Transfer (ICT) process to send the case to the correct County of Responsibility because eHIT does not currently support a way to change the COR on the new application

## 1.2 Requests

With CalHEERS Change Request 171387, CalHEERS will add a new CalHEERS-SAWS Search Interface to allow CalSAWS to search MAGI case, application and person information known to CalHEERS and they will send back the information to CalSAWS.

CalHEERS will now allow CalSAWS to update the CalSAWS-MAGI case linkage with 'Case Linkage Override' functionality in an EDR. CalHEERS will now have functionality in eHIT to accept updated CalSAWS-CalHEERS person associations in an EDR. Lastly, CalHEERS will add functionality for CalSAWS to cancel a DER-U and change the COR if received by the incorrect county; CalHEERS will update the COR for the MAGI case and then trigger a DER-U to the correct county.

1. Create a real-time CalHEERS-SAWS Search Interface to send a search request to CalHEERS and receive a response with MAGI case, application, and person information known in CalHEERS.
2. Add new MAGI search pages to CalSAWS for users to search and view MAGI case, application, and person-level information known to CalHEERS.
3. Add new MAGI case linkage update functionality that allows users to update case linkage between a CalSAWS and MAGI case directly from CalSAWS.
4. Add functionality to allow a user to cancel a DER-U and inform CalHEERS of the correct County of Responsibility.
5. Update the eHIT interface to send case linkage update information and person association updates in an EDR and to send a CancelDER transaction with 'Update COR' reason and the new county.

### 1.3 Overview of Recommendations

1. Create a new real-time CalHEERS-SAWS Search Interface that sends a search request to CalHEERS and receives a search response from CalHEERS with MAGI case, application and person information known to CalHEERS.
2. Create a new 'MAGI Case Search' page to allow a user to search and view MAGI case, application, and person-level information known to CalHEERS.
3. Create a new MAGI Search Response Case Detail page to display MAGI case-level and summary person-level information provided in the search response from the CalHEERS-SAWS Search transaction.
4. Create a new 'MAGI Search Response Person Detail' page for a user to view person-level information provided in the search response from the CalHEERS-SAWS Search transaction.
5. Create new MAGI-SAWS Case Linkage Update functionality to allow CEW to perform a Case Linkage Update between a CalSAWS and CalHEERS case.
6. Update the 'MAGI Determination List' page to display the 'Request Case Linkage Update' field along with the selected new MAGI Case number. The Request Case Linkage Update will remain on the MAGI Determination List page until the user sends an EDR, cancels the Request Case Linkage Update, navigates away and performs a new MAGI Case Search, the user's session times out, or the user logs off the system.
7. Update the 'MAGI Request Detail' page to display the 'Request Case Linkage Update' and show 'Confirm Associations' button when the user is requesting a case linkage update.
8. Update the 'Person Association List' page to allow a user to update the CalHEERS Person number associated to the CalSAWS person only on the first EDR of an EDR companion set. Also, update the page to display a 'Confirm' button when the user is going through the process to update the case linkage.
9. Update the 'MAGI Referral Detail' page to allow a user to cancel a MAGI Referral or Determination Change when it belongs to a different county.
10. Create a new real-time CalHEERS-SAWS Search Interface using REST/JSON technology as a synchronous transaction between CalSAWS and CalHEERS.
11. Update eHIT mappings for Case Linkage Updates, Person Association updates, to add a new Cancel DER reason to update the COR, and to change the logic for a duplicate person in an EDR.
12. Create a MAGI Search Emulator. The MAGI Search Emulator is used for testing purposes only to emulate a Search Response transaction returned from CalHEERS. The MAGI Search Emulator is used in a test/training environment that is not directly connected to a CalHEERS integration test environment.

## 1.4 Assumptions

1. The CancelDER functionality added to update County of Responsibility will only be used when the CalSAWS case has no pending or ongoing MAGI Medi-Cal eligibility.
  - a. If an Unsolicited DER is linked to a CalSAWS case with pending or ongoing Medi-Cal, the user will complete the ICT process to send the MAGI case information to the correct county.
2. The CalHEERS-SAWS Search Interface has a limit of 20 MAGI cases in the search response. If the search response returns an error due to too many MAGI cases matching the criteria, the user can edit the search criteria to return fewer MAGI cases or use the CalHEERS Web Portal to review all the MAGI case information.
3. After the MAGI Case Linkage is updated in a CalSAWS case, all future eHIT transactions will be sent to CalHEERS with the new MAGI case number. This includes EDRs sent for a month prior to the MAGI Case Linkage update.
4. Case Lock functionality will not be updated for this change, as Case Linkage Updates volume is estimated to be minimal.
5. A CalHEERS-SAWS Search by MAGI Application Number will return MAGI Case information if the MAGI Application is associated to a MAGI Case; otherwise, if the MAGI Application was never submitted in CalHEERS and there is no MAGI Case, CalHEERS will return an error of 'No Results Found'.
6. The Schema will be updated with CalHEERS CR 167662 Schema Version 18

## 2 RECOMMENDATIONS

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### 2.1 CalHEERS-SAWS Search Interface – Functional Design

#### 2.1.1 Overview

Create a new real-time CalHEERS-SAWS Search Interface to send a search request to CalHEERS and to receive a search response from CalHEERS with MAGI case, application and person information known to CalHEERS.

#### 2.1.2 Description of Changes

1. Create a real-time CalHEERS-SAWS Search and Response transaction to send and receive with CalHEERS. The CalHEERS-SAWS Search Request transaction allows the user to search and view MAGI case, application, and person information. The user (with specific security rights) may use the CalHEERS-SAWS Response transaction MAGI case, application, and person information in the Case Linkage Update process flow as described in section 2.3.
  - a. CalHEERS-SAWS Search Response Transaction information is view-only.
  - b. CalHEERS-SAWS Search Response Transaction information performed inside the context of a case may be used to perform a Case Linkage Update for users with MAGIUpdateCaseLinkage security right.
  - c. CalHEERS-SAWS Search Response Transaction information will display either the response details, or an error message returned from CalHEERS.
  - d. CalHEERS-SAWS Search Response Transaction information is saved to the user's session. Refer to Section 3 supporting document "HttpSession Utilization"
    - i. The CalHEERS-SAWS Search Response Transaction information will remain available to the user until one of the following actions occurs:
      1. the user sends an EDR, or
      2. the user cancels the MAGI Case Linkage update request, or
      3. the user performs a new MAGI Search, or
      4. after 10 minutes of not actively working the MAGI Case Linkage update, or
      5. the user logs out of CalSAWS.

**Technical Note:** The CalHEERS-SAWS Search Interface will be a new real-time synchronous interface and will use REST/JSON technology. See section 2.9 for technical details.

### 2.1.3 Counties Impacted

All counties

### 2.1.4 Interface Partner

CalHEERS

## 2.2 MAGI Case Search Page

### 2.2.1 Overview

Create a new 'MAGI Case Search' page to allow a user to search and view MAGI case, application, and person-level information known to CalHEERS.

### 2.2.2 MAGI Case Search Page Mockups

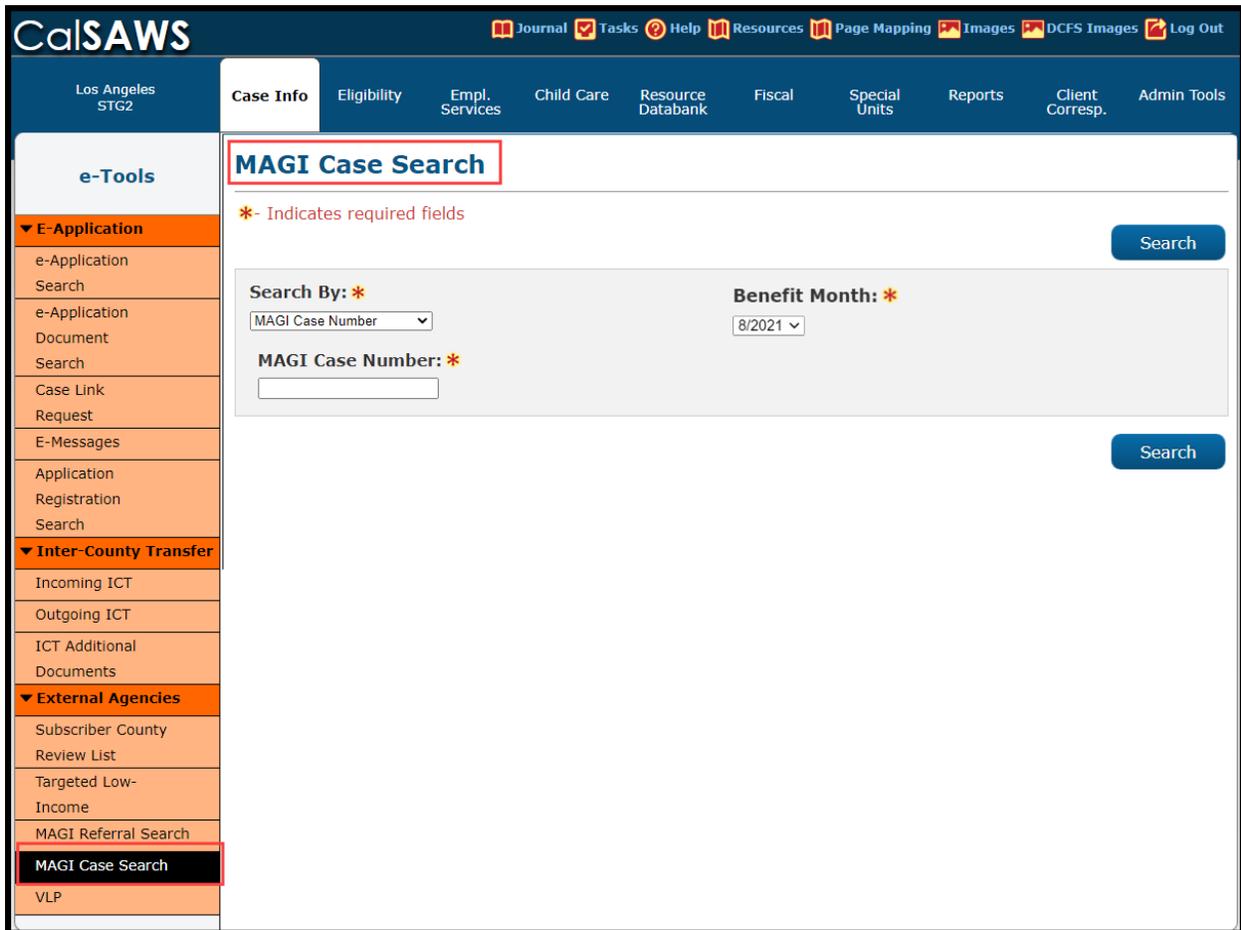


Figure 2.2.1 – MAGI Case Search Page - Initial Page Load Outside Context of a Case with Search by MAGI Case Number

**CalSAWS** Case Name: Tom Hardy Case Number: L204101
 
[Journal](#) [Tasks](#) [Help](#) [Resources](#) [Page Mapping](#) [Images](#) [DCFS Images](#) [Log Out](#)

Los Angeles CH2 Global TS
Case Info
Eligibility
Empl. Services
Child Care
Resource Databank
Fiscal
Special Units
Reports
Client Corresp.
Admin Tools

**Case Summary**

Case Number:

- Person Search
- EBT Account Search
- Application Registration
- Case Summary
- Contact
- Authorized Representative
- Application Questions
- Negative Action
- New Program
- New Person
- Hide Person
- EBT Account List
- Issuance History
- Auxiliary Authorization List
- Expungement History
- Child Support Collections
- Time Limit Aid Summary
- Case Flag
- Legacy Case
- Confidentiality
- ICT Summary
- IAT Summary
- MAGI Case Search**
- Customer Contact History
- SB 87
- Invoice History

### MAGI Case Search

\*- Indicates required fields

Search By: \* Benefit Month: \*

MAGI Case Number  8/2021

MAGI Case Number: \*

Figure 2.2.2 MAGI Case Search Page - Initial Page Load Inside the Context of a Case with Search by MAGI Case Number

### MAGI Case Search

\*- Indicates required fields

---

**Search By: \*** **Benefit Month: \***

MAGI Application Number  8/2021

**MAGI Application Number: \***

Figure 2.2.3 MAGI Case Search Page – Search by MAGI Application Number

### MAGI Case Search

\*- Indicates required fields

---

**Search By: \*** **Benefit Month: \***

Person Information  8/2021

**Last Name:**  **First Name:**  **Date of Birth:**   **CIN:**

**SSN:**  **ATIN:**  **ITIN:**

Figure 2.2.4 MAGI Case Search Page – Search by Person Information

### MAGI Case Search

\*- Indicates required fields

[Search](#)

**Search By: \*** **Benefit Month: \***

SAWS Case and County ▼ 8/2021 ▼

**SAWS Case Number: \*** **SAWS County: \***

▼

[Search](#)

Figure 2.2.5 MAGI Case Search Page – Search by SAWS Case and County

### MAGI Case Search

\*- Indicates required fields

► Refine Your Search

**Search Results Summary**

MAGI Case Number	MAGI Case Status	SAWS Case Number	SAWS Case County
CalHEERS Error:Internal exception occurred			

Figure 2.2.6 MAGI Case Search Page with CalHEERS Error Response Returned

## MAGI Case Search

\*- Indicates required fields

**Your Search request has timed out.**

**Search By: \***  
 MAGI Case Number

**Benefit Month: \***  
 8/2021

**MAGI Case Number: \***

Search

Search

Figure 2.2.7 MAGI Case Search Page with CalSAWS time out error displayed

## MAGI Case Search

\*- Indicates required fields

► Refine Your Search

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

MAGI Case Number	MAGI Case Status	SAWS Case Number	SAWS Case County
<a href="#">500000008</a>	Inactive	<a href="#">1B0H38Z</a>	San Bernardino
<a href="#">500000009</a>	Inactive	1C98H22	San Francisco
<a href="#">500000010</a>	Inactive	<a href="#">1B00YY2</a>	Los Angeles

Figure 2.2.8 MAGI Case Search Page with Successful Response

### 2.2.3 Description of Changes

1. Create a new page named: 'MAGI Case Search'.
  - a. Display this link on the Task Navigation when outside of the context of a case.
  - b. Display this link on the Task Navigation only when there is a Medi-Cal program when inside the context of a case.
2. Add a section named 'Refine Your Search' as follows:

Section Header	Description
Refine Your Search	<p>On page load, this section header 'Refine Your Search' does not display.</p> <p>After the user performs a search, this section header displays collapsed.</p> <p>The user can expand the section to modify the search criteria and perform a new search. When user expands the section, the previous search criteria is displayed.</p>

3. Add an unnamed filter subsection with the following:

Field Label	Description
Select Search Criteria	<p>A drop-down menu with the following values in this order:</p> <ul style="list-style-type: none"> <li>• MAGI Case Number</li> <li>• MAGI Application Number</li> <li>• Person Information</li> <li>• SAWS Case Number and County</li> </ul> <p>The drop-down defaults to 'MAGI Case Number' option on page load.</p> <p>This field is required</p>
Benefit Month	<p>A drop-down menu with the following values in this order:</p> <ul style="list-style-type: none"> <li>• Current Month thru Come-Up Month</li> </ul> <p>The drop-down defaults to 'Come-Up Month' option on page load.</p>

4. Dynamically display the search criteria fields below based on the drop-down value selected in 'Select Search Criteria':

Select Search Criteria	Field Label	Description
MAGI Case Number	MAGI Case Number	Field allows 10-digit alpha numeric value. This field is required
MAGI Application Number	MAGI Application Number	Field allows 30-digit alpha numeric value. This field is required
Person Information	First Name	Field allows a maximum of 50 characters.  1. Allow letters (a-z, A-Z) 2. Allow following special characters: a. apostrophe (') b. space ( ) c. period (.) d. hyphen (-) 3. Allow maximum 50 characters.  This field is conditionally required if either Last Name or DOB is populated. The conditional requirement is handled with a page validation.
	Last Name	Field allows a maximum of 50 characters.  1. Allow letters (a-z, A-Z) 2. Allow following special characters: a. apostrophe (') b. space ( ) c. period (.) d. hyphen (-) 3. Allow maximum 50 characters.  This field is conditionally required if either First Name or DOB is populated. The conditional requirement is handled with a page validation.

Select Search Criteria	Field Label	Description
	Date of Birth	Date field in MM/DD/YYYY format. The calendar icon will show with the date picker. This field is conditionally required if either First or Last Name is populated. The conditional requirement is handled with a page validation.
	SSN	Field allows 9 digits. This field is not required.
	ATIN	Field allows a maximum of 9 digits. This field is not required.
	ITIN	Field allows a maximum of 9 digits. This field is not required.
	CIN	Field allows a 9-character alpha-numeric value. This field is not required.
SAWS Case Number and County	SAWS Case Number	Field allows for a maximum 7-character alpha-numeric value.  This field is required.
	County	Drop-down field with county name in alpha order (CT_15).  This field is required.

5. Button

Field Label	Description
Search	The 'Search' button sends the search criteria information to CalHEERS.  On click, the label on the button will change to 'Processing' and grey out until a response is returned from CalHEERS.

6. Add a section named, "Search Results Summary" with the following columns:

Column Label	Description
MAGI Case Number	<u>For a Successful Response:</u>

Column Label	Description
	<p>Display the MAGI Case Number returned in the CalHEERS-SAWS Search Response transaction.</p> <p>The <a href="#">Hyperlink</a> navigates to the 'MAGI Search Response Case Detail' page.</p> <p>OR</p> <p><u>For an Error Response:</u>            Display the Error Message returned in the CalHEERS-SAWS Search Response transaction in the following format: "CalHEERS Error: &lt; Response Error Message&gt;" (The Error Message text can span all columns and wrap if needed.)</p>
MAGI Case Status	<p>Display the MAGI Case Status returned in the CalHEERS-SAWS Search Response transaction.</p>
SAWS Case Number	<p>Display the actively linked SAWS Case number returned in the CalHEERS-SAWS Search Response transaction. If no actively linked SAWS case is returned, display the last associated SAWS Case number.</p> <p>If no actively linked SAWS case number or last associated SAWS case number is returned, display in the order returned from the CalHEERS-SAWS Search Response transaction.</p> <p>Add a <a href="#">Hyperlink</a> to the SAWS Case Number if the SAWS Case/County is known to CalSAWS; otherwise, do not hyperlink.</p>

Column Label	Description
	The <a href="#">Hyperlink</a> navigates to the Case Summary page for the known CalSAWS case number.
SAWS Case County	Display the actively linked SAWS Case County returned in the CalHEERS-SAWS Search Response transaction. If no actively linked SAWS Case County is returned, display the last associated SAWS Case County.

7. CalHEERS will keep the CalHEERS-SAWS Search Request/Response synchronous transaction open for 30 seconds. If CalHEERS has not provided a response transaction after 35 seconds, CalSAWS will stop waiting for CalHEERS and display the below Error Message as shown in Figure 2.2.7.
  - a. Error Message: Your Search request has timed out.
    - i. Display in Red text on the top of the MAGI Case Search page.
8. Add the following page validations, and do not send a search request when the minimum search criteria are not met when the 'Select Search Criteria' is "Person Information"
  - a. **Criteria:** If more than one of CIN, SSN, ATIN, or ITIN are populated and none of First Name, Last Name, and DOB are populated  
**Validation message:** Search By – Narrow search to only one of the following: CIN, SSN, ATIN, or ITIN.
  - b. **Criteria:** If either First Name, Last Name or DOB are populated, then First Name, Last Name and DOB are required.  
**Validation message:** Search By – For search by Name or DOB, First Name, Last Name and DOB are required.
  - c. **Criteria:** If First Name, Last Name and DOB are populated and more than one of CIN, SSN, ATIN, or ITIN are populated  
**Validation message:** Search By – Narrow search to Name, DOB, and either CIN, SSN, ATIN or ITIN.
  - d. **Criteria:** If all field values are blank.  
**Validation message:** Search By – enter search criteria.
9. Add AMP bar
10. Update label 'MAGI' on the Navigation Task bar to 'MAGI Referral Search' as shown in Figure 2.2.1.

## 2.2.4 Page Location

Outside the context of case in Figure 2.2.1

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Case Search

Inside the context of case in Figure 2.2.2

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** MAGI Case Search

## 2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGICaseSearchEdit	User has rights to change Search Type, add search criteria and click [Search] button.	MAGI Case Search Edit
MAGICaseSearchView	User has view only rights	MAGI View

## 2. Security Groups

Security Group	Group Description	Group to Role Mapping
MAGI Case Search Edit	This group has the rights to perform a search.	

### 2.2.6 Page Mapping

Add Page Mappings for the new page.

### 2.2.7 Page Usage/Data Volume Impacts

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

## 2.3 MAGI Search Response Case Detail Page

### 2.3.1 Overview

Create a new MAGI Search Response Case Detail page to display MAGI case-level and summary person-level information provided in the search response from the CalHEERS-SAWS Search transaction.

### 2.3.2 MAGI Search Response Case Detail Page Mockup

#### MAGI Search Response Case Detail

Close

<b>MAGI Case Number:</b> 5000000009	<b>MAGI Case Status:</b> Inactive	<b>Initiated Date:</b> 05/26/2021 1:13 PM
<b>MAGI Application Number:</b> 198000	<b>MAGI Application Status:</b> Completed	<b>County of Responsibility:</b> Riverside
<b>Actively Linked SAWS Case Number:</b>	<b>Active SAWS Case County:</b>	
<b>Last Associated SAWS Case Number:</b> 1B0H387	<b>Last Associated SAWS County:</b> San Bernardino	

▼ MAGI Case Members

Name	DOB	SSN	CIN
<a href="#">Hardy, Tom 45</a>	01/22/1987	444-44-4444	39319735A
<a href="#">Hardy, Danielle 11</a>	06/01/2010	675-30-0702	31419735A

Close

Figure 2.3.1 – MAGI Search Response Case Detail Outside Context of a Case (View-only Mode)

### MAGI Search Response Case Detail

Link to Case
Close

<b>MAGI Case Number:</b> 5000000009	<b>MAGI Case Status:</b> Inactive	<b>Initiated Date:</b> 05/26/2021 1:13 PM
<b>MAGI Application Number:</b> 198000	<b>MAGI Application Status:</b> Completed	<b>County of Responsibility:</b> Riverside
<b>Actively Linked SAWS Case Number:</b>	<b>Active SAWS Case County:</b>	
<b>Last Associated SAWS Case Number:</b> 1B0H387	<b>Last Associated SAWS County:</b> San Bernardino	

▼ MAGI Case Members

Name	DOB	SSN	CIN
<a href="#">Hardy, Tom 45</a>	01/22/1987	444-44-4444	39319735A
<a href="#">Hardy, Danielle 11</a>	06/01/2010	675-30-0702	31419735A

Link to Case
Close

Figure 2.3.2 – MAGI Search Response Case Detail Inside Context of a Case (Edit Mode)

### 2.3.3 Description of Changes

1. Create a new page named 'MAGI Search Response Case Detail'
  - a. 'MAGI Search Response Case Detail' page will be a view-only page when navigated to from outside the context of a case as shown in Figure 2.3.1.
  - b. 'MAGI Search Response Case Detail' page will be in edit mode and allow a user to link the MAGI case to the CalSAWS case when inside the context of a case as shown in Figure 2.3.2.
2. Add an unnamed header section with the following fields:

Field Label	Description
MAGI Case Number	Displays the MAGI case number as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
MAGI Case Status	Displays the MAGI case status as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

Field Label	Description
Initiated Date	Displays the date of the response as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
MAGI Application Number	Displays the MAGI Application Number as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
MAGI Application Status	Displays the MAGI Application status provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
County of Responsibility	Displays the County of Responsibility as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Actively Linked SAWS Case Number	<p>Displays the Active SAWS Case Linkage as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>
Active SAWS Case County	<p>Displays the Active SAWS County for the SAWS Case as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>
Last Associated SAWS Case Number	<p>Displays the last known SAWS Case number for the MAGI Case as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>

Field Label	Description
Last Associated SAWS County	<p data-bbox="943 247 1414 422">Displays the last known SAWS County for the SAWS case as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p data-bbox="943 459 1414 552">This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>

3. Add the 'MAGI Case Members' section with the following columns:

Column Label	Description
Name	<p>Displays the standard CalSAWS name format "Last Name, First Name &lt;age in years&gt; using the DOB of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>The <a href="#">hyperlink</a> opens the 'MAGI Response Person' Detail page for the individual.</p>
DOB	Displays the Date of Birth of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
SSN	Displays the Social Security Number of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
CIN	Displays the Client Index Number of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

4. Buttons

Field Label	Description
Close	The 'Close' button will close the 'MAGI Case Summary' page and navigate user back to the 'MAGI Search Response' page.
Link to Case	<p>The 'Link to Case' button will navigate user to the 'MAGI Determination List' page.</p> <p>This button has special security rights so that only users with the MAGIUpdateCaseLinkage security right will see the button and have the rights to perform a case linkage update.</p> <p>The button displays only when there is a Pending or Active Medi-</p>

	Cal program on the CalSAWS case.
--	----------------------------------

5. Add a page validation to prevent a user from linking the CalSAWS case to a different MAGI case if the CalSAWS case has ongoing MAGI Medi-Cal eligibility and the new MAGI case is closed. (Refer to Figure 2.3.3)
  - a. **Criteria:** All the following are true:
    - i. 'Link to Case' button is clicked
    - ii. the CalSAWS case has a Medi-Cal program with at least one Active MAGI beneficiary
    - iii. the selected MAGI case is closed.
  - b. **Validation message: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the CalSAWS case has ongoing MAGI Medi-Cal and the selected MAGI case is closed.

This is a hard validation.

6. Add a page validation to prevent a user from linking the CalSAWS case to a MAGI case if the CalSAWS case has pending or ongoing MAGI Medi-Cal eligibility and the new MAGI case County of Responsibility is different and the MAGI case has any individuals with pending, conditional eligible, or eligible MAGI Medi-Cal eligibility. (Refer to Figure 2.3.3)
  - a. **Criteria:** All the following are true:
    - i. 'Link to Case' button is clicked
    - ii. the CalSAWS case has at least one Pending or Active Medi-Cal program
      1. If the MC program is active, there is at least one Active MAGI beneficiary
    - iii. the selected MAGI case's COR is not the same county as the CalSAWS case
    - iv. the selected MAGI case has at least one individual with 'Pending', 'Conditionally Eligible', or 'Eligible' MAGI Medi-Cal status.
  - b. **Validation message: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the CalSAWS case has pending or ongoing Medi-Cal eligibility and the selected MAGI case is in a different county with pending, conditionally eligible, or active MAGI beneficiaries.

This is a hard validation.

7. Add a page validation to prevent a user from linking the CalSAWS case to the selected MAGI case if the selected MAGI case has more individuals with pending, conditionally eligible, or eligible MAGI eligibility, than in the CalSAWS case household. (Refer to Figure 2.3.3)
  - a. **Criteria:** All the following are true:
    - i. 'Link to Case' button is clicked
    - ii. the number of individuals with 'Pending', 'Conditionally Eligible', or 'Eligible' MAGI Medi-Cal status in the selected MAGI case is greater than the number of individuals in the CalSAWS case household.
  - b. **Validation: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the MAGI case has more pending, conditionally eligible or eligible MAGI Medi-Cal individuals than in the CalSAWS case household.

This is a hard validation.

8. Add a page validation to prevent a user from linking the CalSAWS Case to the selected MAGI Case if the MAGI case is currently linked to the CalSAWS case. (Refer to Figure 2.3.3)
  - a. **Criteria:** All the following are true:
    - i. 'Link to Case' button is clicked
    - ii. The CalSAWS case is currently linked to the New MAGI Case.
  - b. **Validation: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the MAGI case is already linked to the CalSAWS case.

This is a hard validation.

9. Add a warning message to display upon page load when the MAGI case in the MAGI Search Response has pending, conditionally eligible, or eligible MAGI Medi-Cal eligibility in the same county as the CalSAWS Case. (Refer to Figure 2.3.3)
  - a. **Criteria:** The MAGI case has the same COR as the CalSAWS case and the MAGI case has pending, conditionally eligible, or eligible MAGI beneficiaries.
  - b. **Warning Message:** The MAGI case has at least one individual pending, conditionally eligible or eligible on MAGI Medi-Cal in the same county as the CalSAWS case.

User is still able to select the 'Link to Case' button.

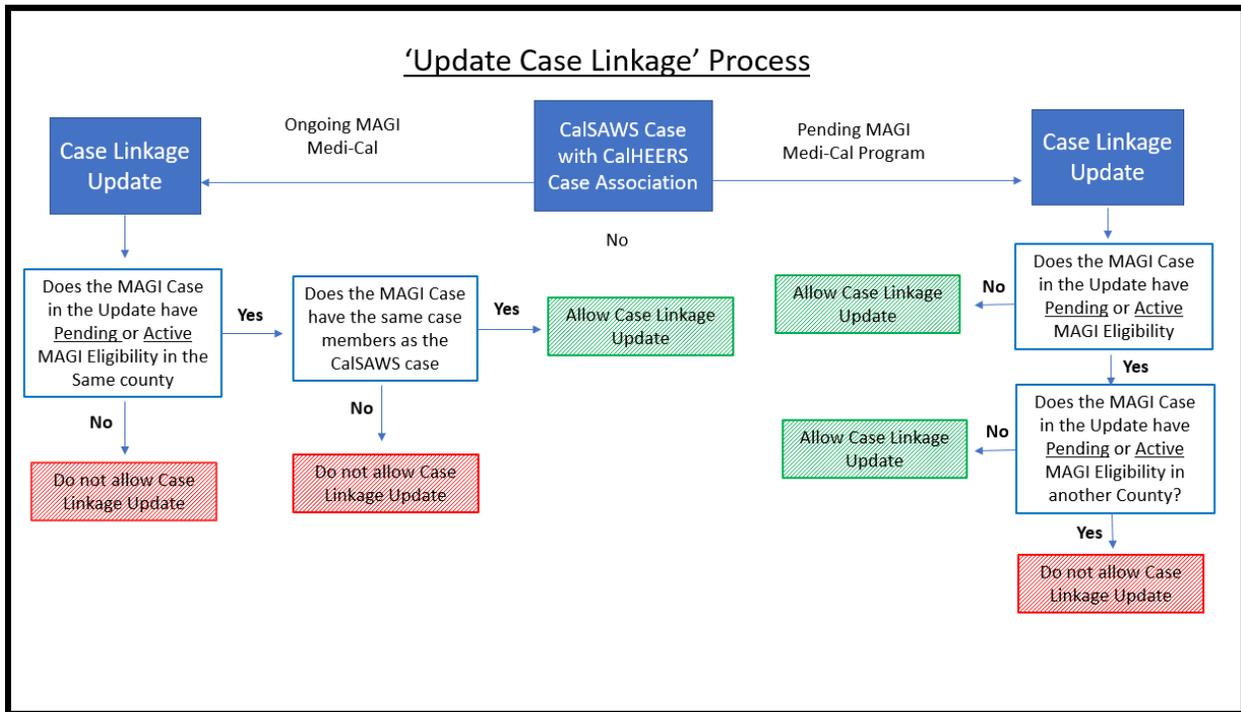


Figure 2.3.3 Case Linkage Update Process Flow Chart

### 2.3.4 Page Location

Outside context of a case as shown in Figure 2.3.1

- **Global:** Case Info
- **Local:** New Application
- **Task:** MAGI Search -> 'MAGI Case Number' hyperlink

Inside context of case as shown in Figure 2.3.2

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** MAGI Search -> 'MAGI Case Number' hyperlink

### 2.3.5 Security Updates

#### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGIUpdateCaseLinkage	This Security Right allows the 'Link to Case' button to initiate a MAGI case linkage update.	MAGI Search Response Case Detail Edit
MAGISearchResponseCaseDetailEdit	Allows the Person Name 'hyperlinks' to open MAGI Search Response Person Detail Page	MAGI Search Response Detail Edit
MAGICaseSearchView	User has view only rights	MAGI View

#### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
MAGI Search Response Case Detail Edit		

### 2.3.6 Page Mapping

Add Page Mapping for the new page.

### 2.3.7 Page Usage/Data Volume Impacts

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

## 2.4 MAGI Search Response Person Detail Page

### 2.4.1 Overview

Create a new MAGI Search Response Person Detail page for a user to view person-level information provided in the search response from the CalHEERS-SAWS Search transaction.

### 2.4.2 MAGI Search Response Person Detail Mockup

#### MAGI Search Response Person Detail

Close

Name			
<b>Last Name:</b>	<b>First Name:</b>	<b>Primary Contact:</b>	
Hardy	Tom	Yes	

CalHEERS Admin Information			
<b>CalHEERS Person Number:</b>	<b>SAWS Person Number:</b>	<b>CalHEERS Account Created:</b>	<b>Active in CalHEERS:</b>
01	01	Yes	Yes

Individual Demographics			
<b>Social Security Number:</b>	<b>ATIN:</b>	<b>ITIN:</b>	
564-79-6743			
<b>Date of Birth:</b>	<b>CIN:</b>		
01/12/1990	826535117		

Medi-Cal Eligibility Information	
<b>MAGI Status:</b>	<b>Non-MAGI Status:</b>
Discontinued	Ineligible

Covered California Eligibility Information			
<b>Active Enrollment:</b>			
No			
<b>APTC Status:</b>	<b>CSR Status:</b>	<b>QHP Status:</b>	<b>Title XXI (MCAP/CCHIP Status):</b>
Ineligible	Ineligible	Ineligible	Ineligible

Close

Figure 2.4.1 – MAGI Search Response Person Detail

### 2.4.3 Description of Changes

1. Create a new view-only page named: 'MAGI Search Response Person Detail'
2. Add an unnamed header section and display the following fields:

Field Label	Description
Last Name	Last Name of individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
First Name	First Name of individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Primary Contact	Displays the Primary Contact information of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

3. Add a 'CalHEERS Admin Information' section and display the following fields:

Field Label	Description
CalHEERS Person Number	Displays the CalHEERS Person Number for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
SAWS Person Number	Displays the SAWS Person Number for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
CalHEERS Account Created	Displays a 'Yes' or 'No' value if a CalHEERS account was created for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Active in CalHEERS	Displays a 'Yes' or 'No' value if the individual is active in CalHEERS as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

4. Add the 'Individual Demographics' section and display the following fields:

Field Label	Description
Social Security Number	<p>Displays the Social Security Number of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>Note: If there is no SSN returned, the value will display blank.</p>
ATIN	<p>Displays the ATIN of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>Note: If there is no ATIN returned, the value will display blank.</p>
ITIN	<p>Displays the ITIN of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>Note: If there is no ITIN returned, the value will display blank.</p>
Date of Birth	<p>Displays the Date of Birth of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p>
CIN	<p>Displays the CIN of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p>

5. Add the 'Medi-Cal Eligibility Information' section and display the following fields:

Field Label	Description
MAGI Status	Displays the MAGI Eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Non-MAGI Status	Displays the Non-MAGI Eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

6. Add the 'Covered California Eligibility Information' section and display the following fields:

Field Label	Description
Active Enrollment	Displays active enrollment to a Covered CA plan for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.  Note: Value of 'Yes' indicates Active Enrollment. Value of 'No' indicates no active enrollment
APTC Status	Displays APTC eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
CSR Status	Displays CSR eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
QHP Status	Displays the QHP eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Title XXI (MCAP/CCHIP) Status	Displays the Title XXI (MCAP/CCHIP) eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

7. Button

Field Label	Description
Close	The 'Close' button will navigate user back to the 'MAGI Search Response Case Detail' page.

**2.4.4 Page Location**

Outside the context of case

- **Global:** Case Info
- **Local:** New Application
- **Task:** MAGI Search -> MAGI Search Response Case Detail -> 'Case Member' Hyperlink

Inside the Context of case

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** MAGI Search -> MAGI Search Response Case Detail -> 'Case Member' Hyperlink

**2.4.5 Security Updates**

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGISearchResponseCaseDetailEdit	Allows the Person Name 'hyperlinks' to open MAGI Search Response Person Detail Page	MAGI Search Response Detail Edit
MAGICaseSearchView	User has view only rights	MAGI View

## 2. Security Groups

Security Group	Group Description	Group to Role Mapping
MAGI Search Response Case Detail Edit		

### 2.4.6 Page Mapping

Add Page Mappings for the new page.

### 2.4.7 Page Usage/Data Volume Impacts

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

## 2.5 MAGI Determination List Page

### 2.5.1 Overview

Update the 'MAGI Determination List' page to display the 'Request Case Linkage Update' field along with the selected new MAGI Case number. The Request Case Linkage Update will remain on the MAGI Determination List page until the user sends an EDR, cancels the Request Case Linkage Update, navigates away and performs a new MAGI Case Search, the user's session times out, or the user logs off the system.

## 2.5.2 MAGI Determination List Detail Mockup

### MAGI Determination List

\*- Indicates required fields

#### Request MAGI Determination

<b>Begin Date: *</b> 09/2021	<b>End Date: *</b> 09/2021
<b>Program Identifier: *</b> Medi-Cal	<b>Request Case Linkage Update:</b> 5000000009 <b>Cancel</b>
<b>Life Change Event:</b> ▼	

**Request MAGI**

Figure 2.5.1 – MAGI Determination List Page – Request Case Linkage Update

### MAGI Determination List

\*- Indicates required fields

#### Request MAGI Determination

<b>Begin Month: *</b> 09/2021	<b>End Month: *</b> 09/2021
<b>Program Identifier: *</b> Medi-Cal	<b>Request Case Linkage Update:</b> <b>Recover Case Linkage</b>
<b>Life Change Event:</b> ▼	

- Bypass Primary Contact Matching Criteria
- Request Lift Options
- Request Negative Action Determination
- Restart VLP e-Verification

**Request MAGI**

Figure 2.5.2 – MAGI Determination List Page – Recover Case Linkage Update

### 2.5.3 Description of Changes

1. Add a field named 'Request Case Linkage Update' on the MAGI Determination List page as shown in Figure 2.5.1.
  - a. Display the 'Request Case Linkage Update' field when the 'MAGI Determination List' page is navigated to from the 'MAGI Search Response Case Detail' page.
    - i. Display the 'Request Case Linkage Update' field to the right of the 'Program Identifier' field.
  - b. Display the new MAGI case number under the 'Request Case Linkage Update' field.
  - c. Add a 'Cancel' button to the right of the 'MAGI Case Number' as shown in Figure 2.5.1.
2. When the 'MAGI Determination List' page is navigated to from the 'MAGI Search Response Case Detail' page and the 'Request Case Linkage Update' field is populated:
  - a. Default the 'Begin Month' and 'End Month' to the come-up month and display as 'read-only' as shown in figure 2.5.1.
  - b. Hide the following fields:
    - i. Bypass Primary Contact Matching Criteria
    - ii. Request Lift Options
    - iii. Request Negative Action Determination
    - iv. Restart VLP e-Verification
3. When the 'Cancel' button is clicked, hide the 'MAGI Case Number', and 'Cancel' button, and display a new button named: 'Recover Case Linkage' as shown in Figure 2.5.2
  - a. Upon Page re-load with the 'Recover Case Linkage' button, remove the case linkage update, and display the following fields:
    - i. Begin Date and End Date as editable fields.
    - ii. Primary Contact Matching Criteria
    - iii. Request Lift Options
    - iv. Request Negative Action Determination
    - v. Restart VLP e-Verification
4. If the 'Recover Case Linkage' button is clicked, hide the 'Recover Case Linkage' button, and display the MAGI Case Number under the 'Request Case Linkage Update' field along with the 'Cancel' button and display the fields as stated in 2.5.3.2 (a-b).
  - a. If the 'Recover Case Linkage' button remains, and user clicks the 'Request MAGI' button, remove the Case Linkage Update information from the user's session and use current MAGI case information in the EDR

5. When the 'Request Case Linkage Update' field is populated, and the user clicks the 'Request MAGI' button:
  - a. Populate 'Case Linkage Override Indicator' = 'Yes' on the EDR for the Come-Up month.
  - b. Populate the new MAGI case number in the EDR
  - c. Populate the CalHEERS Person Number for the New MAGI Case as follows:
    - i. If the New MAGI Case has a previous CalSAWS-MAGI Case association and the CalSAWS person is in the latest 'reviewed', or 'completed' DER transaction
      1. Use the CalHEERS Person number from that DER
      2. Otherwise, do not populate the CalHEERS Person number for the individual and leave the field blank.

**Note:** If user wants to process prior benefit months, it can be done after the Case Linkage has been updated.

#### 2.5.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** MAGI Search -> MAGI Case Summary -> 'Link to Case' -> MAGI Determination List

#### 2.5.5 Security Updates

No Changes

#### 2.5.6 Page Mapping

Add Page Mappings for the updated page.

#### 2.5.7 Page Usage/Data Volume Impacts

No Change

## 2.6 MAGI Request Detail Page

### 2.6.1 Overview

Update the 'MAGI Request Detail' page to display the 'Request Case Linkage Update' and show 'Confirm Associations' button when the user is requesting a case linkage update.

### 2.6.2 MAGI Request Detail Page Mockup

#### MAGI Request Detail

[Confirm Associations](#) [Cancel](#)

<b>MAGI Case Number:</b> 5000009311	<b>MAGI Case Name:</b> Hardy	<b>Request ID:</b> 10000004628
<b>Case Number:</b> <a href="#">L300C70</a>	<b>Case Name:</b> Tom Hardy	<b>Request Case Linkage Update:</b> Yes
<b>Type:</b>	<b>Status:</b> Pending	
<b>Run Reason:</b> Continuing	<b>Benefit Month:</b> 08/01/2021	<b>Program: *</b> Medi-Cal

#### ▼ Application

<b>Application Date:</b> 04/06/2021	<b>Primary Applicant/Recipient:</b> Tom Hardy	<b>Application Source:</b> SAWS
<b>Life Change Event:</b>	<b>Life Change Event Date:</b>	<b>Requested Retro:</b> No
<b>Maintain Verifications:</b> 5	<b>Consent for Verifications:</b> Yes	<b>R&amp;R Agreed:</b> Yes
<b>Signed Status/Date:</b> Signed on 04/06/2021		

#### ▼ Case Members

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
<a href="#">Tom Hardy</a>	01	02/04/1987	564-98-0705	39319735A	
<a href="#">Danielle Hardy</a>	02	06/01/2010	675-30-0702	31419735A	

Figure 2.6.1 – MAGI Request Detail with 'Request Case Linkage Update' and 'Confirm Associations' Button

### MAGI Request Detail

[View Previous](#)
[Send All](#)
[Cancel](#)

<b>MAGI Case Number:</b> 5000009311	<b>MAGI Case Name:</b> Hardy	<b>Request ID:</b> 10000004628
<b>Case Number:</b> <a href="#">L300C70</a>	<b>Case Name:</b> Tom Hardy	<b>Request Case Linkage Update:</b> Yes
<b>Type:</b>	<b>Status:</b> Pending	
<b>Run Reason:</b> Continuing	<b>Benefit Month:</b> 08/01/2021	<b>Program: *</b> Medi-Cal

**▼ Application**

<b>Application Date:</b> 04/06/2021	<b>Primary Applicant/Recipient:</b> Tom Hardy	<b>Application Source:</b> SAWS
<b>Life Change Event:</b>	<b>Life Change Event Date:</b>	<b>Requested Retro:</b> No
<b>Maintain Verifications:</b> 5	<b>Consent for Verifications:</b> Yes	<b>R&amp;R Agreed:</b> Yes
<b>Signed Status/Date:</b> Signed on 04/06/2021		

**▼ Case Members**

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
<a href="#">Tom Hardy</a>	01	02/04/1987	564-98-0705	39319735A	
<a href="#">Danielle Hardy</a>	02	06/01/2010	675-30-0702	31419735A	

[View Associations](#)

Figure 2.6.2 – MAGI Request Detail with 'Request Case Linkage Update'

### 2.6.3 Description of Changes

1. Add a field named: 'Request Case Linkage Update' in the MAGI Request Detail Page as shown in Figure 2.6.1.
  - a. Display 'Request Case Linkage Update' to the right of 'Case Name' field.
  - b. Display the field only when an EDR is created from a Case Linkage Update and has 'Case Linkage Override Indicator' = 'Yes'.
2. When the 'MAGI Request Detail' page has 'Case Linkage Override Indicator' = 'Yes' as shown in Figure 2.6.1:
  - a. Hide the 'Send All', 'View Next', and 'View Associations' buttons
  - b. Display a new button titled: 'Confirm Associations' to the left of the 'Cancel' button.

3. If user clicks on the 'Cancel' button, return to the 'MAGI Determination List' page and retain the Case Linkage Update information and display page as shown in figure 2.5.1.
  4. When user clicks on the 'Confirm Associations' button navigate to the 'Person Association List' page.
  5. When the 'MAGI Request Detail' page is navigated back to from the 'Person Association List' Page:
    - a. Display the 'View Next' (If applicable), 'View Previous' (If applicable), 'Send All', 'Cancel', and 'View Associations' buttons as shown in figure 2.6.2.
  6. When the user clicks the 'Send All' button, clear the CalHEERS-SAWS Search Response transaction information from the user's session.
- Technical Note:** Once EDR is sent to CalHEERS the 'MAGI Determination List' page loads per current functionality.
7. Once DER transaction is received for the Case Linkage update, perform a mass update to link 'Referrals' or 'Determination Changes' that have no prior linkage and are in the same county in 'Received' or 'In Process' status for the same MAGI Case number to the CalSAWS case.

**Note:** If user hits the 'Cancel' button, the Case Linkage Update information will remain in the user session.

#### 2.6.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Info
- **Task:** MAGI Eligibility -> Request MAGI

#### 2.6.5 Security Updates

1. No Changes

#### 2.6.6 Page Mapping

Add Page Mappings for the updated page.

#### 2.6.7 Page Usage/Data Volume Impacts

No Change

## 2.7 Person Association List Page

### 2.7.1 Overview

Update the Person Association List page to allow a user to update the CalHEERS Person number associated to the CalSAWS person only on the first EDR of an EDR companion set. Also, update the page to display a 'Confirm' button when the user is going through the process to update the case linkage.

### 2.7.2 MAGI Referral Detail Page Mockup

**Person Association List**

MAGI Case Number:  
5000000009

▼ Persons included in the Request

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN	
Hardy, Tom	01	Hardy, Tom	01	<a href="#">View Details</a>
Hardy, Danielle	02	Hardy, Danielle	02	<a href="#">View Details</a>

Confirm

Confirm

Figure 2.7.1 – MAGI Referral Detail

### 2.7.3 Description of Changes

1. Update the 'View Details' button to open the 'Person Association Detail' page in Edit mode for the first EDR, and in 'view-only' mode for all companion EDRs.
  - a. Person Association details for the first EDR will be copied for all EDRs in a companion set.
2. Replace the 'Close' button with a button titled: 'Confirm' when the 'Person Association List' page is navigated to from the 'Request MAGI' Detail page during a Case Linkage Update as shown in Figure 2.7.1.

### 2.7.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI-> Initiated Date

### 2.7.5 Security Updates

No Changes

### 2.7.6 Page Mapping

No Change

### 2.7.7 Page Usage/Data Volume Impacts

No Change

## 2.8 MAGI Referral Detail Page

### 2.8.1 Overview

Update the 'MAGI Referral Detail' page to allow a user to cancel a MAGI Referral or Determination Change when it belongs to a different county.

### 2.8.2 MAGI Referral Detail Page Mockup

**MAGI Referral Detail**

**Warning: Clicking the Save and Send button will Send a request to CalHEERS to update the County of Responsibility. Once Saved, this Referral can no longer be used.**

**Save and Send** **Cancel**

<b>MAGI Case Number:</b> 5000022351	<b>MAGI Case Name:</b> Se	<b>Initiated Date:</b> 01/13/2022 3:26 PM
<b>Origination:</b> Service Centre Representative, Service Centre Supervisor	<b>Determination ID:</b> 9602	
<b>Case Number:</b>	<b>Case Name:</b> Se	<b>Request ID:</b>
<b>Type:</b> Referral	<b>Status: *</b> Canceled	<b>Covered CA Change:</b> No
	<b>Cancellation Reason: *</b> Update County of Responsibility	<b>County of Responsibility: *</b> - Select -
<b>Run Reason:</b> Continuing	<b>Benefit Month:</b> 08/01/2021	<b>Program:</b>

Figure 2.8.1 – MAGI Referral Detail

### 2.8.3 Description of Changes

1. Update the 'Cancellation Reason' field to no longer use drop down values from Status Reason code table (CT\_73) and to use the new Cancel DER Reason code table created in 2.10.2.4. This will add a new Cancellation Reason option to the dropdown named, 'Update County of Responsibility'.
2. Add a new drop-down named, "County of Responsibility:" as shown in Figure 2.8.1.
  - a. Display 'County of Responsibility' to the right of the 'Cancellation Reason' field.
  - b. Display 'County of Responsibility' as a required field when Cancellation Reason "Update County of Responsibility" is selected.
  - c. Drop-Down options:
    - i. Display the full county name from the County Code Table (CT\_15)
3. Add logic to allow a user to update the status of a Determination Change to 'Canceled' when the DER meets the following criteria:
  - a. The DER is linked to a CalSAWS case
  - b. The Type is Determination Change
  - c. The CalSAWS case to which the DER is linked has no open Medi-Cal programs.
4. Update the existing page warning to display when the Cancellation Reason selected is either 'Application Opened in Error' or 'Duplicate Application'.
  - a. **Criteria:** the user selected Cancellation Reason of 'Application Opened in Error' or 'Duplicate Application'
  - b. **Warning message:** Warning: Clicking the Save and Send button will Send a Cancellation request to CalHEERS. Once Saved, this Referral and the MAGI Case Number can no longer be used. This warning message will not stop the user from sending a CancelDER transaction.
5. Add a new page warning to display when the Cancellation Reason selected is 'Update County of Responsibility'.
  - c. **Criteria:** the user selected Cancellation Reason 'Update County of Responsibility'.
  - d. **Warning message:** Warning: Clicking the Save and Send button will send a request to CalHEERS to update the County of Responsibility. Once Saved, this Referral can no longer be used. This warning message will not stop the user from sending a CancelDER transaction.

### 2.8.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search-> Initiated Date

### **2.8.5 Security Updates**

No Changes

### **2.8.6 Page Mapping**

1. Update Page Mapping to the new code table for the Cancellation Reason and for Updated County of Responsibility.

### **2.8.7 Page Usage/Data Volume Impacts**

No Change

## 2.9 CalHEERS-SAWS Search Interface

### 2.9.1 Overview

Create a new real-time CalHEERS-SAWS Search Interface to allow a user to request MAGI case, application, and person information from CalHEERS while in CalSAWS. The Interface uses REST/JSON technology and is a synchronous transaction between CalSAWS and CalHEERS.

**NOTE:** IDD – CalHEERS SAWS Search document is embedded in this Design Document for reference.

### 2.9.2 Description of Change

1. Create a Search Request and Response transaction for the CalHEERS-SAWS Search Interface using the CalHEERS-SAWS IDD, (Refer to section 3, Supporting Documents for the CalHEERS-SAWS IDD).
2. Determine the Search Type Code to send in the Search Request transaction per the table below:

MAGI Case Search page Select Search Criteria	MAGI Case Search page Search Data Information	Search Request Transaction Search Type Code
MAGI Case Number	MAGI Case Number	01
MAGI Application Number	MAGI Application ID	02
Person Information	SSN, or ATIN, or ITIN	03
Person Information	CIN	04
Person Information	First Name, Last Name, and DOB	05
Person Information	First Name, Last Name, DOB, and either CIN, SSN, ATIN, or ITIN	06
SAWS Case Number and County	SAWS Case Number and County	07

### 2.9.3 Execution Frequency

N/A

### 2.9.4 Key Scheduling Dependencies

N/A

### **2.9.5 Counties Impacted**

All Counties

### **2.9.6 Data Volume/Performance**

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

### **2.9.7 Interface Partner**

CalHEERS

### **2.9.8 Failure Procedure/Operational Instructions**

Technical Operations staff will evaluate errors/failures and determine the appropriate resolution.

## 2.10 eHIT

### 2.10.1 Overview

Update eHIT mappings for Case Linkage Updates, Person Association updates, to add a new Cancel DER reason to update the COR, and to change the logic for a duplicate person in an EDR.

### 2.10.2 Description of Change

1. Update eHIT outbound logic to send 'CaseLinkageOverrideInd' = 'Yes' when the 'Request Case Linkage Update' = 'Yes' on the MAGI Request Detail Page.
2. Update eHIT outbound logic to send 'CaseLinkageOverrideInd' = 'Yes' along with the 'InterCountyTransferInd' = 'Yes', when the Incoming ICT is linked to the receiving County with prior CalHEERS case linkage.
3. Update eHIT outbound logic to send the 'UpdateSAWSPersonAssociationInd' = 'Yes' in an EDR when
  - a. The Person Number in the 'Edit Person Number' page is updated, or
  - b. The CalHEERS Person number in the 'Person Association Detail' page is updated.
  - c. 'UpdateSAWSPersonAssociationInd' element is in the Person Node.
4. Create a new Cancel DER Reason code table with the following values:

Code	Description
01	Application Opened in Error
04	Duplicate Application
05	Update COR

5. Update Status Reason code table to no longer use the CancelDER column ('CDR' CT73\_146) and free it up for future use.
6. Update eHIT outbound logic to send Cancel DER Reason code in the CancelDER transaction based on the new Cancel DER Reason code table (and not CT\_73).
7. Update eHIT outbound logic to send the 'Updated County of Responsibility' when the Cancel DER Reason Code of 05 – 'Update COR' is selected.
  - a. 'UpdatedCountyOfResponsibility' element is in the 'CancelDER' node.
  - b. Populate FIPS County code from CT\_15 Column 6 for 'CountyofResponsibility' element.
8. Update eHIT logic to inform CalHEERS when an individual is marked as a duplicate in CalSAWS if they have Pending or Active MAGI Medi-Cal eligibility in CalHEERS.

- a. If the Individual has 'Pending', 'Conditionally Eligible', or 'Eligible' status for MAGI Medi-Cal on the last DER transaction, and
- b. The Individual does not have the following on the last EDR
  - i. 'RemovedPersonInd' = 'Yes'
  - ii. 'RemovalReason', = 'OOH' (Out of Household)
  - iii. 'RemovalDate' = 'System Date'
  - iv. 'ApplyingforHealthCoverageInd' = 'No', then
- c. Set the values of the following elements on EDR:
  - i. 'RemovedPersonInd' = 'Yes'
  - ii. 'RemovalReason' = 'OOH' (Out of Household)
  - iii. 'RemovalDate' = 'System Date'
  - iv. 'ApplyingForHealthCoverageInd' = 'No'

### **2.10.3 Interface Partner**

CalHEERS

### **2.10.4 eHIT Schema Version**

Version 18

## 2.11 MAGI Search Emulator

### 2.11.1 Overview

Create a MAGI Search Emulator. The MAGI Search Emulator is used for testing purposes only to emulate a Search Response transaction returned from CalHEERS. The MAGI Search Emulator is used in a test/training environment that is not directly connected to a CalHEERS integration test environment.

### 2.11.2 Description of Change

1. The MAGI Search Response emulated results will return the MAGI case/person information from the MAGI Search page when the following information is entered.
  - a. For Successful Response:
    - i. **MAGI Case Number** – Enter a MAGI Case Number and click the 'Search' button
      1. The MAGI Search Emulator will return the MAGI case information and any CalSAWS case information associated to the MAGI case number known in CalSAWS.

For example: Create a CalSAWS case A in county A linked to MAGI Case 1. ICT those individuals (and the MAGI Case 1) to County B/CalSAWS Case B. If you search for MAGI Case 1, the MAGI Search Response emulator will return two rows.

MAGI Case 1 – County A – CalSAWS Case A

MAGI Case 1 – County B – CalSAWS Case B

- ii. **SAWS Case and County** – Enter a CalSAWS case and county and click the 'Search' button
        1. The MAGI Search Emulator will return MAGI case information known to that CalSAWS case number.
  - b. For Error Response:
    - i. **Person Information** – Enter data in person information related fields and click the 'Search' button
      1. The MAGI Search Emulator will return the following error message: **Request timeout occurred**
    - ii. **MAGI Application Number** – Enter data in MAGI Application Number and click the 'Search' button
      1. The MAGI Search Emulator will return the following error message: **No results found**

2. The MAGI Search Response Emulator will return MAGI Case Status defaulted to Inactive.
  - a. To return MAGI Case Status 'Active', enter the Middle Name 'Active' for the Primary Applicant in Individual Demographics.

**Example:** Create a CalSAWS Case A and enter all data collection fields you wish to return in the MAGI Search Response. Once Case A is set up and linked to MAGI Case A1, log into a different county and create Case B. While in the context of Case B, perform a MAGI Search using Case A information and the Search criteria above. The MAGI Search emulator will return response data based on the persons and case info for Case A.

## 2.12 Automated Regression Test

### 2.12.1 Overview

Create new automated regression test scripts to verify in-county and cross-county MAGI Case Search functionality against the new MAGI Search Emulator.

### 2.12.2 Description of Change

Create new regression test scripts to cover each of the following scenarios:

1. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant who has no middle name. Submit two separate MAGI Case Search with the linked MAGI Case Number and verify that the results match the information of the case in context, with a MAGI Case Status of Inactive.
2. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant whose middle name is 'Active'. Submit a MAGI Case Search with the linked MAGI Case Number and verify that the results match the information of the case in context, with a MAGI Case Status of Active.
3. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant whose middle name is not 'Active'. Create a second Medi-Cal case in another CalSAWS county with the same primary applicant. Submit two separate MAGI Case Search requests from within the context of the second case with:
  - a. The MAGI Case Number from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Inactive.
  - b. The SAWS Case Number and SAWS County from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Inactive.

4. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant whose middle name is 'Active'. Create a second Medi-Cal case in another CalSAWS county with a different primary applicant. Submit two separate MAGI Case Search requests from within the context of the second case, with:
  - a. The MAGI Case Number from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Active.
  - b. The SAWS Case Number and SAWS County from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Active.
5. Create a new Medi-Cal case with active MAGI linkage. Submit a MAGI Case Search with Person Information matching the primary applicant. Verify a "Request timeout occurred" error message is displayed.
6. Within the context of a new or existing Medi-Cal case with active MAGI linkage, submit a MAGI Case Search with a MAGI Application Number populated. Verify a "No results found" result is displayed.
7. Outside the context of a case, submit separate MAGI Case Search requests with the following details:
  - a. A MAGI Case Number matching an existing case in the same county with active MAGI linkage. Verify the results match the details of the linked case, and the MAGI Case Status is:
    - a. Inactive if the primary applicant's middle name is not 'Active'
    - b. Active if the primary applicant's middle name is 'Active'
  - b. The SAWS Case Number and SAWS County of an existing case in the same or another county with active MAGI linkage. Verify the results match the details of the linked case, and the MAGI Case Status is:
    - a. Inactive if the primary applicant's middle name is not 'Active'
    - b. Active if the primary applicant's middle name is 'Active'
  - c. Person Information matching an existing case in the same county with active MAGI linkage. Verify that a "Request timeout occurred" error message is displayed.
  - d. A MAGI Application Number populated. Verify that a "No results found" result is displayed.
8. Within the context of a new or existing Medi-Cal case, submit a MAGI Case Search with each of the following Person Information details provided. Verify that the appropriate validation message displays.
  - a. CIN and SSN
  - b. First Name and Last Name
  - c. Last Name and DOB
  - d. First Name, Last Name, DOB, CIN, and SSN
  - e. No details – all fields left blank

9. Outside the context of a case, submit a MAGI Case Search with each of the following Person Information details provided. Verify that the appropriate validation message displays.
  - a. CIN and SSN
  - b. First Name and Last Name
  - c. Last Name and DOB
  - d. First Name, Last Name, DOB, CIN, and SSN
  - e. No details – all fields left blank
10. Within the context of a new or existing Medi-Cal case, attempt to submit MAGI Case Search requests with at least one required field left blank, Verify that the required field validation message displays.
  - a. By MAGI Case Number: No MAGI Case Number populated
  - b. By MAGI Application Number: No MAGI Application Number populated
  - c. By Person Information:
    - a. First Name not populated, and either Last Name or DOB populated
    - b. Last Name not populated, and either First Name or DOB populated
    - c. DOB not populated, and either First Name or Last Name populated
  - d. By SAWS Case Number and County:
    - a. No SAWS Case Number populated
    - b. No SAWS County populated

**Note:** The details for each successful search should be verified on the MAGI Case Search, MAGI Response Case Detail, and MAGI Search Response Person Detail pages. When in the context of a case, verify the “Link to Case” button displays. When outside the context of a case, verify the “Link to Case” button does not display.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IDD – CalHEERS SAWS Search	CalHEERS-SAWS Search Transaction Interface Design Document	 IDD - CalHEERS SAWS Search.pdf
2	Http Session Utilization	User Session Time Frame diagram	 Session%20Utilization.pptx

### 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.	CalSAWS will send, receive, and display MAGI case, application, and person information via the CalHEERS-SAWS Interface with CalHEERS.
2.20.1.14	The LRS shall include direct access and online inquiry to other systems, as required by COUNTY.	CalSAWS will create a new real-time CalHEERS-SAWS Interface to send and receive MAGI case, application, and person information with CalHEERS.
2.20.1.19	The LRS shall have the ability to receive data from external sources (e.g., State, SACWID system and COUNTY-approved agencies/partners) for the purposes of establishing and maintaining a case.	CalSAWS will allow Case Linkage Updates to be performed for a CalSAWS to CalHEERS case.  CalSAWS will allow a Cancel DER to be sent to CalHEERS to update the County of Responsibility to CalHEERS.