

[CA-221711] Case Linkage between CalHEERS and SAWS

Issue Type:	SCR	Team Responsible:	CalHEERS	Assignee:	Maksim Volf
Fix Version/s:	[22.02]	Designer Contact:	Cynthia Ridley	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	3307
Reporter:	Renee Gustafson	Regulation Reference:		Created:	11/10/2020 12:06 PM
Status:	In Development	Impact Analysis:		Outreach Required:	
Policy/Design Consortium Contact:	Maureen Votta	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Funding Source ID:	CalHEERS		
Other Agency Cross Reference:	CH-171387				

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

Request:

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.

Recommendation:

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.

Outreach

Description:

Operational Impact: