

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-234766

Case Linkage Phase II between CalHEERS and
SAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

This document details CalSAWS updates in support of changes with CalHEERS Change Request 181476, Case Linkage Phase II.

CalHEERS and CalSAWS Communicate Medi-Cal eligibility via the Determination Eligibility Response (DER) and Disposition transaction. CalHEERS sends DER transactions to CalSAWS to communicate eligibility provided via CalHEERS. CalSAWS Medi-Cal EDBC will pull in the DER for the EDBC benefit month and once the Regular EDBC is Accepted and Saved, CalSAWS sends the Disposition transaction to CalHEERS to communicate the final eligibility authorized in the system.

CalSAWS Medi-Cal EDBC does not have a restriction on how old the DER transaction is that is used in EDBC. Consequently, a DER used in the Medi-Cal EDBC could be older than 2 years old, even for MAGI Medi-Cal beneficiaries. MAGI Medi-Cal should be reevaluated on an annual basis; therefore, CalSAWS will add a page validation to prevent the user from Accepting and Saving a Regular Medi-Cal EDBC for a MAGI Medi-Cal beneficiary with a DER received more than 2 years in the past.

CalSAWS continues to communicate the updated Medi-Cal eligibility via the Disposition transaction to CalHEERS even when the Medi-Cal case is entirely Non-MAGI Medi-Cal. DHCS provided guidance to SAWS to only send a Disposition transaction to CalHEERS to communicate when a Medi-Cal program first becomes entirely Non-MAGI Medi-Cal, or when the Non-MAGI Medi-Cal Referral is processed. SAWS is no longer required to communicate updates to Non-MAGI Medi-Cal eligibility for cases with only Non-MAGI Medi-Cal beneficiaries to CalHEERS. Therefore, CalSAWS will no longer send Dispositions to communicate eligibility updates for cases with only Non-MAGI Medi-Cal beneficiaries to CalHEERS.

In 19.07 release, CalHEERS implemented CR-119301 (Technical Updates to Separate Post-Eligibility Business Logic) that split out CalHEERS post-eligibility business logic for the DER and Disposition transactions; this changed the way CalHEERS stores DER data. CalHEERS performed a data conversion to map DER data received prior to 19.07 to the new post-19.07 DER data format. In 21.02 release, CalHEERS implemented CR-160528 (CalHEERS eHIT: BREfS – Consume SAWS Eligibility Authorization and Manage Downstream Processes) where CalHEERS began using the eligibility information in Dispositions to finalize eligibility in CalHEERS.

After 21.02 release, CalHEERS discovered the data conversion from CR-119301 (19.07 release) was not implemented correctly and CalHEERS is unable to process any Disposition for a DER received prior to the 19.07 release. CalSAWS Medi-Cal EDBC uses the **valid DER** in the EDBC and for some Medi-Cal cases, the valid DER is from prior to 19.07. CalSAWS will add a page validation to prevent the user from Accepting and Saving a Regular Medi-Cal EDBC with a DER received prior to 19.07 (July 29, 2019) and will no longer send a Disposition related to a DER received prior to 19.07.

1.1 Current Design

CalHEERS sends DER transactions to CalSAWS that contain the CalHEERS Case Number, SAWS Case Number, DER ID and DER received date, amongst other data elements. CalSAWS Medi-Cal EDBC rules pulls in the valid DER for the EDBC benefit month. After the Regular EDBC is Accepted and Saved, CalSAWS sends a Disposition transaction to CalHEERS to communicate the final eligibility authorized in CalSAWS. CalSAWS always sends a Disposition when the DER used in the Regular EDBC has status of 'Reviewed'. CalSAWS sends a Disposition when the DER used in the Regular EDBC has status 'Complete' and the eligibility in EDBC changed from the prior EDBC.

EDBC determines if a Disposition will be initiated. EDBC locates the DER, checks if the DER status is 'Complete' and if there is an aid code change by comparing the aid code in the last Disposition sent to the current EDBC aid code and if the aid code has changed, EDBC initiates a Disposition.

The Disposition transaction contains the CalHEERS Case Number, SAWS Case Number, DER ID, and DER received date amongst other data elements. CalHEERS uses this information to process the Disposition. If CalHEERS receives the Medi-Cal Disposition transaction successfully, they send an acknowledgment to CalSAWS and CalSAWS changes the DER status in CalSAWS from 'Reviewed' to 'Complete'.

If CalHEERS is unable to successfully process the Medi-Cal Disposition transaction, either CalHEERS does not send an acknowledgement at all, or CalHEERS sends an error acknowledgment and the DER remains in 'Reviewed' status. Any subsequent Regular Medi-Cal EDBC run against the same DER results in CalSAWS sending a new Disposition transaction to CalHEERS. This cycle will occur until CalHEERS is able to successfully process the Disposition transaction.

CalSAWS does not have a restriction of how old a DER is used in the Regular Medi-Cal EDBC. CalSAWS allows DERs older than 2 years to be used in the Regular Medi-Cal EDBC if that is the valid DER.

1.2 Requests

1. Prevent using a DER dated prior to July 29, 2019, for online Regular MAGI Medi-Cal EDBC.
2. Require a DER used in online Regular MAGI Medi-Cal EDBC to be no more than 2 years old.
3. No longer continue to send Dispositions for Updates to Non-MAGI Medi-Cal-only cases once Non-MAGI Medi-Cal has been communicated to CalHEERS.
4. No longer send Dispositions for DERs dated prior to July 29, 2019.

1.3 Overview of Recommendations

1. Update the 'Medi-Cal EDBC Summary' page to prevent user from accepting the Regular Medi-Cal EDBC if the MC EDBC used a DER with an 'Initiated Date' prior to July 29, 2019.
2. Update the 'Medi-Cal EDBC Summary' page to prevent user from accepting the Regular Medi-Cal EDBC if the benefit month of the DER used in the MC EDBC is 2 years or older than the EDBC benefit month.
3. Update EDBC to no longer initiate a Disposition if the DERs 'Initiated Date' is prior to July 29, 2019.
4. Update EDBC to no longer initiate a Disposition for changes in Non-MAGI Medi-Cal programs.

1.4 Assumptions

1. Batch EDBC Skips will not be added to skip EDBC if the DER used in the Medi-Cal EDBC is 2 years or older or received prior to July 29, 2019, because this would require a post-EDBC skip and would result in all EDBC programs skipping for the case, including CalWORKs, CalFresh, etc.

2 RECOMMENDATIONS

2.1 Medi-Cal EDBC Summary

2.1.1 Overview

The 'Medi-Cal EDBC Summary' page displays eligibility results for both MAGI and Non-MAGI Medi-Cal determinations. When the EDBC is run for MAGI only, and the MAGI budget is passed, the page allows the user to 'Accept' or 'Cancel' the determination. When EDBC results determine eligibility for both MAGI and Non-MAGI, the page allows the user to Elect the appropriate Medi-Cal benefit and 'Accept' or 'Cancel' the determination.

The 'Medi-Cal EDBC Summary' page will now display a page validation when the user 'Accepts' an EDBC with a passed MAGI budget and the DER used in the MAGI budget is either received prior to July 29, 2019, or the DER benefit month is 2 years or older than the EDBC benefit month. These page validations will prevent the EDBC from being Accepted and Saved.

2.1.2 Medi-Cal EDBC Summary Mockup

Medi-Cal EDBC Summary

Accept
Cancel

* **Cancel** - MAGI DER 'Initiated Date' is prior to July 29, 2019

Begin Month	End Month	Run Date	Run Status	Accepted By
01/2022		06/08/2022	Not Accepted	Cynthia Ridley

EDBC Information

Type: Regular
 Recalculation: No
 EDBC Ran for MAGI Only: No

Program Configuration

System Determination
 EDBC Source: Online EDBC Rules
 Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
Duck, Daisy 54F	01/12/1968	MEM		Active		MAGI <input type="text" value="MAGI"/>

Apply
Override Program Configuration

Reporting Configuration

Property Test

Test	Result	Property Limit	Property Total	Person	Individual Amount
MPPP - MC	Pass	\$7,970.00	<u>\$0.00</u>	Duck, Daisy 54F	\$0.00
MC Property	Pass	\$2,000.00	<u>\$0.00</u>	Duck, Daisy 54F	\$0.00

Medi-Cal Summary

Note: Overridden rows are in bold.

Eligible Budgets for MEDS

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
MAGI	Pass	\$0	0.00		M1	Duck, Daisy 54F	MEM	

Figure 2.1.1 – ‘Medi-Cal EDBC Summary’ page with Validation Message displayed for “MAGI DER ‘Initiated Date’ is prior to July 29, 2019”

Medi-Cal EDBC Summary

* **Cancel** - MAGI DER benefit month is 2 years or older than EDBC benefit month Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
01/2022		05/24/2023	Not Accepted	Cynthia Ridley

EDBC Information

Type: Regular
 Recalculation: No
 EDBC Ran for MAGI Only: No

Program Configuration

System Determination
 EDBC Source: Online EDBC Rules
 Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason	Elected Benefit
Duck, Daisy 55F	01/12/1968	MEM		Active		

[Override Program Configuration](#)

▸ **Reporting Configuration**

Property Test

Test	Result	Property Limit	Property Total	Person	Individual Amount
MPPP - MC	Pass	\$7,970.00	<u>\$0.00</u>	Duck, Daisy 55F	\$0.00

Medi-Cal Summary

Note: Overridden rows are in bold.

Eligible Budgets for MEDS

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
MAGI	Pass	\$0	0.00		M1	Duck, Daisy 55F	MEM	

Figure 2.1.2 – ‘Medi-Cal EDBC Summary’ page with Validation Message displayed for “MAGI DER benefit month is 2 years or older than EDBC benefit month”

2.1.3 Description of Changes

1. Add the following page validation to the ‘Medi-Cal EDBC Summary’ page to prevent a user’s ability to ‘Accept’ the EDBC when the DER used in the ‘Passed’ MAGI budget is received prior to July 29, 2019.
 - a. **Criteria:** All the following are true:
 - i. Program Type = Medi-Cal
 - ii. Eligible Budgets for MEDS = MAGI Pass
 - iii. The DER’s BRE Timestamp is prior to July 29, 2019
 - b. **Validation Message:** Cancel – MAGI DER ‘Initiated Date’ is prior to July 29, 2019

Technical Note: This validation is applicable for the EDBC run from ‘Run EDBC’ or ‘Negative Action Detail’ pages.

2. Add the following page validation to the 'Medi-Cal EDBC Summary' page to prevent a user's ability to 'Accept' the EDBC when the DER used in the 'Passed' MAGI budget has the benefit month 2 years or older than the EDBC benefit month.
 - a. **Criteria:** All the following are true:
 - i. Program Type = Medi-Cal
 - ii. Eligible Budgets for MEDS = MAGI Pass
 - iii. DER benefit month is 2 years or older compared to the EDBC benefit month.
 - b. **Validation Message:** Cancel – MAGI DER benefit month is 2 years or older than EDBC benefit month.

Technical Note: This validation is applicable for the EDBC run from 'Run EDBC' or 'Negative Action Detail' pages.

2.1.4 Page Location

Run EDBC

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Run EDBC -> EDBC List -> 'Medi-Cal' hyperlink

Negative Action

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** Negative Action -> Negative Action Detail

2.1.5 Security Updates

No change

2.1.6 Page Mapping

No change

2.1.7 Page Usage/Data Volume Impacts

No projected usage impacts

2.2 EDBC Update

2.2.1 Overview

EDBC will be updated to no longer initiate a Disposition if the DERs 'Initiated Date' is prior to July 29, 2019.

EDBC will be updated to no longer initiate a Disposition for changes in Non-MAGI Medi-Cal programs.

2.2.2 Description of Changes

1. Prevent EDBC from creating a Disposition when the referenced DER Initiated date is before July 29, 2019.
2. Update EDBC disposition aid code change detection logic to identify if a case (All MC programs) is Non-MAGI only using the following:
 - a. Of the individuals in the case with an aid code, the aid code is Non-MAGI using the 'Aid Code' code table (CT_184) as follows:
 - i. MSP Aid Code (Refer_Table_23_Descr) = Y or,
 - ii. LTC Aid Code (Refer_Table_24_Descr) = Y or,
 - iii. Non-MAGI Aid Code (Refer_Table_25_Descr) = Y
3. Add a new column to Aid Code Category Table (CT_184) identifying if the Aid code meets MEC using the supporting document Form 1095B_MEC_List_082. The new column indicates MEC for recommendation 2.2.2.4.i.
4. Using the identified type of Medi-Cal aid code from 2.2.2.2, prevent EDBC from creating a Disposition when:
 - a. the referenced DER status is 'Complete', and
 - b. an aid code change is detected from
 - i. Non-MAGI Medi-Cal to Non-MAGI Medi-Cal with no change in MEC, or
 - ii. Non-MAGI Medi-Cal to no aid code
 - iii. No aid code to Non-MAGI


2.2.3 Programs Impacted

All Programs

2.2.4 Performance Impacts

No changes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Policy	Form 1095B_MEC_List_082	 Form 1095B_MEC_List_082

4 APPENDIX

Valid DER – Medi-Cal EDBC will use the latest DER that has the same benefit month as the EDBC benefit month to generate the MAGI EDBC budget. If there is no DER with the same benefit month as the EDBC benefit month, EDBC will check for the latest DER with a benefit month immediately prior to the EDBC benefit month. If there is no DER with a benefit month immediately prior to the EDBC benefit month, this process is repeated for each prior month until a DER is found.

Note: Only DERs with the latest status of 'Reviewed', 'Complete', or 'Manually Complete' are used in EDBC. The "latest DER" is determined by the last 'Initiated Date'.

