

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-209184

Processing Eligibility Determinations for 250%
Working Disabled Program

CalSAWS	DOCUMENT APPROVAL HISTORY	
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05/26/2022	1.2	Updated numbering. Removed references to treating WD as OPA in other budgets per the CRPC 2101. Updated property limits per CRPC to state that SSI/SSP limits are also updated.	Renee Gustafson

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1 OVERVIEW

The purpose of this SCR is to update the 250% Working Disabled Program (known in CalSAWS as 'Working Disabled') logic as recommended in ACWDL 19-12. The ACWDL emphasizes changes in the Working Disabled exemptions, the property limit verification process for individuals applying for Working Disabled and the unemployment record registration. Furthermore, per MEPM 5R3 & ACWDL 11-38, all disability income of the working disabled individual will be excluded from the Working Disabled eligibility determination. The Medi-Cal EDBC rules performs an SSI/SSP Income and Property test for the Working Disabled eligibility determination but does not display it in EDBC. This SCR will update the EDBC pages to display the SSI/SSP Income and Property tests.

1.1 Current Design

CalSAWS Medi-Cal EDBC rules determine an individual eligible for the Working Disabled program when all the following is met:

- A. The individual is a California Resident at least one day in the EDBC benefit month.
- B. The individual is SSA Disabled at least one day in the EDBC benefit month.
- C. The individual is 'enrolled in a work activity'.
 - o Medi-Cal EDBC rules consider an individual 'enrolled in a work activity' if they have non-zero income with an income type in the 'Earnings' category effective at least one day in the EDBC benefit month.
 - o The 'enrolled in a work activity' check does not require an individual to have an employment record, nor does it allow for periods of unemployment .
 - o The 'enrolled in a work activity' check does not consider an individual enrolled in a work activity if they have income as an IHSS Caregiver ('IHSS – Wages - Caregiver For Spouse/Minor' or 'IHSS – Caregiver Wages – Other').
- D. The individual meets the income and property eligibility requirements of the SSI/SSP program; however, there is no requirement to have received SSI/SSP at any time.
 - o The individual meets SSI/SSP income eligibility requirements when the **Total Net Nonexempt Income** minus the **Net Earned Income** is less than or equal to the SSI/SSP Payment Level for the household size.
 - o The individual meets SSI/SSP property eligibility requirements when the **Total Countable Property** is at or below \$130,000 for an individual and \$195,000 for a couple.

E. The **Total Net Nonexempt Income** is below 250% of the Federal Poverty Level (FPL)

- o Medi-Cal EDBC rules do not consider countable the unearned disability-based income for the Working Disabled applicant(s) in the Working Disabled income determination. The following Income types are not countable when they belong to the Working Disabled applicant(s):

Income Category	Income Type
Disability	Employee - Temporary
	Employee - Permanent
	Private - Temporary
	Private - Permanent
	SDI
	Worker's Comp - Temporary
	Worker's Comp - Permanent
Railroad	Railroad - Disability
Social Security	Social Security Disability
Veterans	Disability - Total

- o Medi-Cal EDBC rules consider countable the unearned disability-based income type for the Working Disabled applicant(s) of 'Veterans Disability - Partial' in the Working Disabled income determination.
- o Medi-Cal EDBC rules consider countable the 'Social Security Retirement' income for the Working Disabled applicant(s) even if the Social Security converted from Disability.
- o Medi-Cal EDBC rules count an ineligible spouse's income in the Working Disabled income determination if Spousal Deeming applies. Spousal Deeming applies if the spouse's **Total Net Income** minus **Allocation to Ineligible Children** is equal to or above the **Standard SSI Allocation** amount.

Technical Note: The 'Standard SSI Allocation' amount is the difference between SSI Couple Amount and SSI Individual Amount (CT963). The 'Allocation to Ineligible Children' is the Standard SSI Allocation amount minus the child's income (including student deduction) - per child.

- F. The individual continues to make premium payments.
 - o Medi-Cal EDBC rules consider an individual up to date on premium payments if there is no high-dated non-compliance record for 'Non-Payment of Premium' effective for the entire EDBC benefit month.

Note: Proposed legislation to reduce premiums to \$0 will be updated in CalSAWS with CA-239984 if the legislation is passed.
- G. The individual is a US Citizen or has Satisfactory Immigration Status.

Medi-Cal EDBC rules perform the SSI/SSP Income calculation for the Working Disabled eligibility determination, but the calculation does not display in the 'Working Disabled' income budget. This makes it difficult for a user to understand when a 'Working Disabled' budget fails for Over SSI/SSP Income limits, especially when the Total Net Nonexempt Income is less than 250% FPL. The reason(s) why an individual is no longer eligible to the Working Disabled program are not displayed in the EDBC results. Also, the Maintenance Need, Unit Size and Income Results do not display for the 250% FPL Income calculation.

Medi-Cal EDBC - Working Disabled				
Begin Month	End Month	Run Date	Run Status	Accepted By
01/2022		12/10/2021	Pending Verification	Renee Gustafson
Income Determination				
Unearned Income			\$	974.60
Unearned Income Deductions			-	20.00
Net Unearned Income			=	954.60
Earned Income			\$	2,014.80
Earned Income Deductions			-	1,039.90
Net Earned Income			=	974.90
Total Net Income			\$	1,929.50
Combined Income Deductions			-	0.00
Income Adjustments			+	0.00
Allocation and Other Deductions			-	0.00
Total Net Nonexempt Income			=	1,930.00
Premium Amount			=	0.00

This [Type 1](#) page took 1.19 seconds to load.

Example Medi-Cal EDBC - Working Disabled Budget Failed for Over SSI/SSP Income Limits

Medi-Cal EDBC - Working Disabled				
Begin Month	End Month	Run Date	Run Status	Accepted By
01/2022	01/2022	01/28/2022	Not Accepted	Renee Gustafson
Income Determination				
Unearned Income			\$	0.00
Unearned Income Deductions			-	0.00
Net Unearned Income			=	0.00
Earned Income			\$	5,600.00
Earned Income Deductions			-	2,842.50
Net Earned Income			=	2,757.50
Total Net Income			\$	2,757.50
Combined Income Deductions			-	0.00
Income Adjustments			+	0.00
Allocation and Other Deductions			-	0.00
Total Net Nonexempt Income			=	2,758.00
Premium Amount			=	0.00

Example Medi-Cal EDBC – Working Disabled Budget Failed for Over 250% FPL

There is no automated process to re-evaluate the beneficiaries at the end of the 26 weeks of unemployment.

1.2 Requests

ACWDL 11-38 and ACWDL 19-12:

Effective August 1, 2011, the Working Disabled beneficiary may remain in the program for up to 26 weeks of temporary unemployment for each annual eligibility period if the individual continues paying their monthly premiums. Unemployment generally means that the individual is incapacitated to work during a period of up to 26 weeks such as: illness, hospitalization, and the like. The individual does not necessarily have to be receiving any type of unemployment benefit.

The Working Disabled beneficiary has the option to retain their earned income in a separately identifiable account and it will be exempted from the Working Disabled property budget.

The Working Disabled individual's Social Security Disability income that has converted to Social Security Retirement income is exempt in the Working Disabled income budget.

1. Update CalSAWS to allow a Working Disabled beneficiary to remain on the program for up to 26 weeks of unemployment. After this period, the beneficiary will no longer be eligible to Working Disabled and will be screened for other Medi-Cal programs.
2. Update CalSAWS to not count 'Veterans Disability – Partial' for a Working Disabled individual in the Working Disabled income determination.
3. Update CalSAWS to consider an individual with Income as an IHSS Caregiver as meeting work activity requirements for a Working Disabled eligibility determination.
4. Add a new Property type, named, 'Retained Earned Income' which will not be counted in the Working Disabled property determination.
5. Update CalSAWS to exempt 'Social Security Retirement' income for the Working Disabled individual if 'Social Security Disability' income converted to Social Security Retirement.
6. Update CalSAWS to save and display specific discontinuance reasons when an individual is discontinued from Working Disabled because they no longer meet Working Disabled eligibility requirements, even when they remain Active and move to another aid code. This will assist the user to manually create the Working Disabled Discontinuance NOA.
7. Update CalSAWS to display the SSI/SSP Income test information and the 250% FPL Maintenance Need and Unit Size for a Working Disabled eligibility determination.
8. Add a batch re-evaluate individuals in Working Disabled who have exhausted their 26th week of unemployment.

1.3 Overview of Recommendations

1. Add a new Customer Options Type named, 'Working Disabled - Unemployment' to track the 26 weeks of allowable unemployment for the Working Disabled beneficiary.
2. Add a new Type of Liquid Property named, 'Retained Earned Income' to be used by Working Disabled. Medi-Cal EDBC rules will include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property. elCT logic will send 'Retained Earned Income' as "Other Liquid Property" in the outbound interface. The new property type will not be included in any other program property budget.
3. Add a new 'Working Disabled Discontinuance Reasons' section to the Individual Detail page to display the reasons an individual is discontinued from Working Disabled, even when they are eligible to another MC program.

4. Update Medi-Cal EDBC rules to:
 - a. consider an individual enrolled in a work activity in the Working Disabled eligibility determination if they have income as an IHSS Caregiver
 - b. allow 26 weeks of unemployment in the Working Disabled eligibility determination
 - c. include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property; exclude it from all other Property budgets
 - d. exempt 'Social Security Retirement' income for the Working Disabled individual if 'Social Security Disability' income converted to Retirement
 - e. exempt 'Veterans Disability – partial' from the Working Disabled budget
 - f. track specific Discontinuance reasons when an individual is no longer eligible to Working Disabled, even if they move to another aid code
5. Update the Medi-Cal EDBC – Working Disabled page to display the SSI/SSP Income Test and additional information for the 250% FPL Income Test.
6. Update the EDBC Person Line Item Detail page for the SSI/SSP Income Test.
7. Add new SSI/SSP Income test information and the Maintenance Need and Unit Size to the Medi-Cal EDBC – Working Disabled budget page.
8. Create a batch sweep job that identifies Medi-Cal individuals in the Working Disabled who have been unemployed for 26 weeks.
 - a. Add a Batch EDBC Sub Run Reason (CT 942) for an automatic journal.

1.4 Assumptions

1. The user determines when the liquid property qualifies as 'Retained Earned Income' and that it is held in a separately identifiable account, and it is not comingled with other resources.
2. The user will add a non-compliance for non-payment of premium if the Working Disabled beneficiary does not pay; otherwise, Medi-Cal EDBC rules assume payments are made when determining an individual in Working Disabled as still eligible, including during the 26 weeks of unemployment.
3. The Medi-Cal re-evaluation of an individual for the end of 26 weeks of unemployment for the Working Disabled will be for Non-MAGI Medi-Cal only and will not automate an EDR to CalHEERS for a MAGI redetermination.
4. Users are responsible for confirming the Working Disabled individual's Social Security Retirement income converted from Social Security Disability and will indicate this in the Income Detail page (recommendation 2.3.3.1).
5. The MC 338A line 10 states: "If a couple is ineligible, redo with only one applicant." Users will leverage the Customer Options type of 'MC Declining Working Disabled' for the excluded spouse in the Working Disabled budget and re-run EDBC; this will result in the other spouse being tested as a single applicant for the Working Disabled program.

6. NOAs and forms for Working Disabled will be addressed in separate SCR CA-239596.
 - a. CalSAWS does generate a SOC Change NOA when an individual moves from no SOC to Working Disabled with a premium or, moves from Non-MAGI Medi-Cal with a SOC to Working Disabled and the SOC and Premium amounts are different.
 - b. CalSAWS does not generate an Approval Notice of Action (NOA) when an individual is approved for Working Disabled.
 - c. CalSAWS does not generate a Change NOA when an individual changes from Non-MAGI Medi-Cal or MAGI Medi-Cal to Working Disabled.
 - d. CalSAWS does not generate a Discontinuance NOA specific to losing coverage in Working Disabled.
 - e. CalSAWS does not have available the Working Disabled Informing Notice (MC 338 G) for the user to generate from the Template repository nor does it generate from an EDBC run.

The user will manually generate a Working Disabled NOA and/or forms until CA-239596 is implemented. Recommendations 2.4 and 2.5.4.6 will display some 'Working Disabled Discontinuance Reasons' to assist the user when manually creating the Working Disabled Discontinuance NOA.

2 RECOMMENDATIONS

2.1 Customer Options Detail Page

2.1.1 Overview

Add a new Customer Options Type named, 'Working Disabled - Unemployment' to track the 26 weeks of allowable unemployment for the Working Disabled beneficiary.

2.1.2 Customer Options Detail - Mockup

The screenshot shows a web form titled "Customer Options Detail". At the top right, there are three buttons: "Save and Add Another", "Save and Return", and "Cancel". Below the title, there is a red asterisk icon followed by the text "* - Indicates required fields". The form has two sections. The first section has a "Name:" label with a red asterisk, a dropdown menu showing "Rubio, Marco 40F", and an "End Date:" label with a calendar icon. The second section has a "Type:" label with a red asterisk and a dropdown menu. The dropdown menu is open, showing a list of options. The option "Working Disabled-Unemployment" is highlighted with a red box. Below the dropdown menu, there are three buttons: "Save and Add Another", "Save and Return", and "Cancel".

Figure 1: Working Disabled-Unemployment Type for the Working Disabled

2.1.3 Description of Changes

1. Add a new Customer Options Type (CT_1707) named, 'Working Disabled - Unemployment'
 - a. Display in the Type list alphabetically
 - b. Name, Type and Begin Date are required fields
 - c. End Date is optional
 - d. The new Type will not have additional input fields

Note: The new Type will follow existing effective-dating rules and only allow one high-dated 'Working Disabled-Unemployment' record per person at a time.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Non-Financial→Customer Options**

2.1.5 Security Updates

None

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.2 Liquid Property Detail Page

2.2.1 Overview

Add a new Type of Liquid Property named, 'Retained Earned Income' to be used by Working Disabled. Medi-Cal EDBC rules will include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property. eICT logic will send 'Retained Earned Income' as "Other Liquid Property" in the outbound interface.

2.2.2 Liquid Property Detail - Mockup

The screenshot displays the 'Liquid Property Detail' form. At the top, there are three buttons: 'Save and Add Another', 'Save and Return', and 'Cancel'. Below these is a legend: '* - Indicates required fields'. The main form area is divided into sections. The first section is 'Liquid Property Type: *', which has a dropdown menu open showing various options. 'Retained Earned Income' is highlighted in red. Other options include Checking Account, Income Tax Refund, Interment Space/Crypt/Niche, IRA, Keogh, Life Estate, Life Insurance, LTC Insurance Disregard, LTC Trust Fund, Money Market, Mortgages/Deeds, Mutual Funds, Other Liquid Property, Pay Card, and Pension Plan. To the right of this section is a 'Received Date:' field with a calendar icon. Below this is a section for 'Considered by SSA (1931b only):' with a blue header bar. Underneath is an 'Account Number:' field. The next section is 'Percentage' with a blue header bar, containing a field with the value '100' and an 'Add' button. At the bottom is a 'Comments:' field with a text area.

Figure 2: Liquid Property Detail

2.2.3 Description of Changes

1. Add a new Liquid Property Type (CT_208) named, 'Retained Earned Income'
 - a. Display in the Type list alphabetically
 - b. Map to 'Other Liquid Property' (19) for eICT outbound
 - c. Translations of the "Retained Earned Income" in the threshold languages (translations will be requested after Committee Approval of the SCR).

Note: There will be no mapping for CMIPS and BenefitsCal

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Financial→Property**

2.2.5 Security Updates

None

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.3 Income Detail Page

2.3.1 Overview

Add a new checkbox named, 'Converted from Social Security Disability' to be used by Working Disabled. Medi-Cal EDBC rules will exclude the 'Social Security Retirement' income in the Working Disabled budget when the checkbox is checked. No change to eICT logic for 'Social Security Retirement' income type.

2.3.2 Income Detail - Mockup

The screenshot displays the 'Income Detail' form. At the top, there are three buttons: 'Save and Add Another', 'Save and Return', and 'Cancel'. Below these, a legend indicates that an asterisk (*) denotes required fields. The form contains several fields: 'Name' (with a dropdown menu showing 'Mouse, Mickey 45M' and a 'Retrieve Information' button), 'Category' (set to 'Social Security'), 'Type' (with a dropdown menu showing 'Social Security Retirement' and a checked checkbox for 'Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement'), 'Source' (an empty text input), 'Frequency' (a dropdown menu with 'Select -'), and 'Description' (a large text area). At the bottom, there is a blue bar with the text 'Shared with RDP'.

Figure 3: Income Detail Page with New “Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement” Checkbox option

2.3.3 Description of Changes

1. Add a checkbox named 'Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement' as shown in Figure 3
 - a. Conditionally display the 'Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement' checkbox as an optional field only when 'Social Security Retirement' Income Type is selected.
 - b. Display the field under the 'Type' drop-down list.

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Financial→Income**

2.3.5 Security Updates

None

2.3.6 Page Mapping

Update page mapping for the new field.

2.3.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.4 Individual Detail Page

2.4.1 Overview

Add a new 'Working Disabled Discontinuance Reasons' section to the Individual Detail page that will display the reasons an individual is discontinued from the Working Disabled, even when they are eligible to another MC program.

2.4.2 Individual Detail - Mockup



Figure 4: Individual Detail

2.4.3 Description of Changes

1. Update Individual Detail page to have a new view-only section for 'Working Disabled Discontinuation Reasons'.
 - a. Display the reason(s) determined from the Working Disabled Discontinuation Reasons from Recommendation 2.5.4.6
 - b. Display the section first if multiple sections display
 - c. Display only when there are 'Working Disabled Discontinuation Reasons' for the individual; otherwise, hide the section.

2.4.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC→EDBC List→Medi-Cal hyperlink→Medi-Cal EDBC Summary→Person Name hyperlink**

2.4.5 Security Updates

None

2.4.6 Page Mapping

Update Page Mapping for the new section.

2.4.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.5 Medi-Cal EDBC Updates

2.5.1 Overview

1. Update Medi-Cal EDBC rules to:
 - a. consider an individual enrolled in a work activity in the Working Disabled eligibility determination if they have income as an IHSS Caregiver
 - b. allow 26 weeks of unemployment in the Working Disabled eligibility determination
 - c. include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property; exclude it from all other Property budgets
 - d. exempt 'Social Security Retirement' income for the Working Disabled individual if Social Security Disability income converted to Retirement
 - e. exempt 'Veterans Disability – partial' from the Working Disabled budget
 - f. track specific Discontinuance reasons when an individual is no longer eligible to Working Disabled, even if they move to another aid code
2. Update the Medi-Cal EDBC – Working Disabled page to display the SSI/SSP Income Test and additional information for the 250% FPL Income Test.
3. Update the EDBC Person Line Item Detail page for the SSI/SSP Income Test.

2.5.2 Medi-Cal EDBC – Working Disabled - Mockup

Medi-Cal EDBC - Working Disabled				
Begin Month	End Month	Run Date	Run Status	Accepted By
12/2021	12/2021	12/03/2021	Not Accepted	Renee Gustafson
Income Determination				
250% FPL Income Test				
Unearned Income			\$	620.00
Unearned Income Deductions			-	440.00
Net Unearned Income			=	180.00
Earned Income			\$	2,830.00
Earned Income Deductions			-	1,447.50
Net Earned Income			=	1,382.50
Total Net Income			\$	1,562.50
Combined Income Deductions			-	0.00
Income Adjustments			+	210.00
Allocation and Other Deductions			-	0.00
Total Net Nonexempt Income			=	1,453.00
Maintenance Need			\$	2,683.33
Unit Size				1
Income Result				Pass
Premium Amount			=	125.00
SSI/SSP Income Test				
Income Calculation			\$	70.50
SSI/SSP Payment Level			\$	954.72
Unit Size				1
Income Result				Pass

Figure 5: Medi-Cal EDBC – Working Disabled page Updated to display SSI/SSP Income Calculation

2.5.3 EDBC Person Line Item Detail – SSI/SSP Income Calculation – Mockup

EDBC Person Line Item Detail - SSI/SSP Income Calculation			
Name	Type	Description	Amount
		(Total Net Nonexempt Income) \$1,453.00 - (Net Earned Income) 1,382.50	\$ 70.50
Total			\$ 70.50

Figure 6: EDBC Person Line Item Detail – SSI/SSP Income Calculation

2.5.4 Description of Changes

1. Update Medi-Cal EDBC Rules, effective benefit months August 2011 or later, to consider the following additional income types as potentially qualifying an individual as 'enrolled in work activity' for the Working Disabled program:

- IHSS: Wages - Caregiver For Spouse/Minor
- IHSS: Caregiver Wages - Other

Technical Note: All other conditions for considering an individual 'enrolled in work activity' are unchanged.

2. Add an 'Unemployment exception' to the Medi-Cal EDBC rules, effective benefit months August 2011 or later, to allow the Working Disabled beneficiary to remain on Working Disabled program for up to 26 weeks (182 days) of unemployment as follows:
 - a. The individual is currently Active MEM on Working Disabled (aid code 6G), and
 - b. The individual does not meet 'enrolled in a work activity' criteria, and
 - c. The individual has a Customer Options 'Working Disabled-Unemployment' record(s) during the redetermination period for no more than 182 days effective the first day of the EDBC benefit month.
 - i. Count the number of days the Customer Options 'Working Disabled-Unemployment' record(s) was effective from the latest Medi-Cal program Redetermination Begin Date to the first day of the EDBC benefit month.
 1. If the number of days is 182 or less, the individual meets the requirements for the 'Unemployment exception' and is eligible to Working Disabled, if otherwise eligible.
 2. If the number of days is 183 or more, the individual does not meet the requirements for 'Unemployment exception' and is no longer eligible to Working Disabled. Discontinue the individual from the Working Disabled program with 'Working Disabled - Unemployed' status reason (See Recommendation 2.5.4.6).
3. Update Medi-Cal EDBC rules, effective benefit months August 2011 or later, for the treatment of the new Liquid Property 'Retained Earned Income' as follows:
 - a. Include 'Retained Earned Income' in the Working Disabled Property budget as an exempt property.
 - b. Exclude 'Retained Earning Income' from all other Medi-Cal Property budgets and do not count towards the property limit.

Note: 'Retained Earned Income' is excluded from all other EDBC programs as well.

4. Update Medi-Cal EDBC rules, effective benefit months August 2011 or later, to exempt the 'Social Security Retirement' income belonging to the Working Disabled individual in the Working Disabled income budget when the 'Social Security Retirement' income record has the 'Medi-Cal 250% Working Disabled: Converted from Social Security Disability at retirement' checkbox checked.

Note: The logic to determine if 'Social Security Retirement' income record is applicable to the Working Disabled income budget for that benefit month remains unchanged.

5. Update Medi-Cal EDBC rules, effective benefit months August 2011 or later, to exempt the unearned Income Type 'Veterans Disability – partial' belonging to the Working Disabled individual in the Working Disabled income budget.
6. Update Medi-Cal EDBC rules to save specific discontinuance reasons when an individual is no longer eligible for Working Disabled; this includes when an individual is not discontinued from Medi-Cal entirely but is no longer eligible to Working Disabled and moves to another Medi-Cal program aid code. A discontinuance reason is not saved when the Working Disabled individual is eligible to a program higher in the Medi-Cal hierarchy.

Note: These reasons are to assist the Not all discontinuance reasons when an in

For example:

- An individual moves from having aid code 6G to aid code 67 because they are over SSI/SSP Levels. Since they are no longer eligible to the Working Disabled program, the 'Working Disabled - Over SSI/SSP Levels' reason will be saved for the discontinuance from Working Disabled.
 - An individual moves from having aid code 6G to aid code 6H when household income is reduced. 6H is higher in the Medi-Cal hierarchy so no Working Disabled-specific discontinuance reason will be saved.
- a. Add the following reasons. These reasons will display on the Individual Detail page when they apply to an individual discontinued from Working Disabled.

Working Disabled Discontinuance Reasons
Working Disabled - Over 250% FPL
Working Disabled - Over Resources
Working Disabled - Unemployed
Working Disabled - No Longer Disabled
Working Disabled - Over SSI/SSP Levels

- b. Using the Medi-Cal EDBC rules for the Working Disabled eligibility determination, save the 'Working Disabled Discontinuance Reason(s)' when the following criteria is met:

- i. 'Working Disabled - Over 250% FPL' when the 'Working Disabled' income budget is failed for being over 250% FPL
 - ii. 'Working Disabled - Over Resources' when the 'Working Disabled' property test result is "Fail"
Technical Note: CalSAWS Non-MAGI Medi-Cal rules check if an individual meets resource requirements before building out Income budgets, so the individual may fail the property test without having a failed 'Working Disabled' income budget.
 - iii. 'Working Disabled - Unemployed' when the Working Disabled individual is found to no longer be 'enrolled in a work activity' and does not meet the 'unemployment exception' per rules in 2.5.4.1 and 2.5.4.2
Technical Note: CalSAWS Non-MAGI Medi-Cal rules check if an individual is 'enrolled in a work activity' before building out Income budgets, so the individual may not have a 'Working Disabled' Income budget in the EDBC.
 - iv. 'Working Disabled - No Longer Disabled' when the Working Disabled individual is found to no longer have verified 'SSA Disabled' record effective at least one day in the EDBC benefit month.
Technical Note: CalSAWS Non-MAGI Medi-Cal rules check if an individual is verified SSA Disabled before building out Income budgets, so the individual may not have a 'Working Disabled' Income budget in the EDBC.
 - v. 'Working Disabled - Over SSI/SSP Levels' when the Working Disabled individual is over SSI/SSP levels and fails the 'Working Disabled' income budget
7. Add new optional fields to the database to store the following fields: SSI/SSP Income Calculation, SSI/SSP Payment Standard, SSI/SSP Unit Size, SSI/SSP Income Result, SSI/SSP Income Test Description
Technical Note: The SSI/SSP Income Test logic is already calculated for the Working Disabled income budget but not saved to the database. This recommendation now saves each of the values to the database for use in the online page displays and to have the history.
8. Update Medi-Cal EDBC – Working Disabled page to have two sections as follows (see Figure 4 for example):
- 250% FPL Income Test**
- a. Add a bolded label, "**250% FPL Income Test**" as the first line in the 'Working Disabled' income budget.
 - b. Unhide the "Maintenance Need" line and display it under "Total Net Nonexempt Income"
 - c. Unhide the "Unit Size" line and display it under the "Maintenance Need" line.

- d. Unhide the "Income Result" line and display it under the "Unit Size" line – this displays the 'Pass/Fail' result for the 250% FPL Income Test.
- e. Add a blank line below "Premium Amount"

SSI/SSP Income Test

- f. Add a new section for the SSI/SSP Income Test. Dynamically display the new section for EDBC's with data in the SSI/SSP Income Test fields.
For example: EDBC's with a 'Working Disabled' income budget created prior to the page changes in this SCR will not display the SSI/SSP Income Test section at all. Whereas EDBC's with a Working Disabled income budget run after the implementation of this SCR will display the SSI/SSP Income Test section.
- g. Add a bolded label, "**SSI/SSP Income Test**" as the first line in the SSI/SSP Income Test section, below the new blank line in Rec 2.5.4.8.e.
- h. Add a new line labeled, "Income Calculation" that displays the SSI/SSP Income Calculation. The amount is a clickable hyperlink that opens the 'EDBC Person Line Item Detail – SSI/SSP Income Calculation' page as described in Recommendation 2.5.4.9
- i. Add a new line labeled, "SSI/SSP Payment Standard" that displays the SSI/SSP Payment Standard used for the household size in the Working Disabled income budget
- j. Add a new line labeled, "Unit Size" that displays the Household size used in the SSI/SSP Income Calculation
- k. Add a new line labeled, "Income Result" that displays "Pass" or "Fail"

Note: 'Pass' means the **SSI/SSP Income Calculation** is less than or equal to the **SSI/SSP Payment Standard** for the household size. 'Fail' means the **SSI/SSP Income Calculation** is more than the **SSI/SSP Payment Standard** for the household size.

- 9. Update the EDBC Person Line Item Detail page to have a version for the SSI/SSP Income Calculation as follows (see Figure 5 for example):
 - a. Header of the page is, "EDBC Person Line Item Detail – SSI/SSP Income Calculation"
 - b. 'Name' and 'Type' have no value in the column
 - c. 'Description' displays the 250% FPL Income Test **Total Net Nonexempt Income** minus the **Net Earned Income** in the following format:
 "(Total Net Nonexempt Income) \$" <Net Nonexempt Income Amount from the 250% FPL Income Test> " – (Net Earned Income) " <Net Earned Income Amount from the 250% FPL Income Test>
 - d. 'Amount' displays the SSI/SSP Income Calculation amount

2.5.5 Programs Impacted

Medi-Cal

2.5.6 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC→EDBC List→Medi-Cal hyperlink→Medi-Cal EDBC Summary→Person Name hyperlink→Working Disabled income budget**

2.5.7 Page Mapping

Update Page Mapping for the new fields.

2.5.8 Security Updates

None

2.5.9 Performance Impacts

No noticeable impacts to performance.

2.5.10 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.6 Create Working Disabled End of Unemployment Batch Sweep

2.6.1 Overview

Create a new batch sweep job that will identify individuals in the Working Disabled Program after their 26th week of unemployment. The batch job will trigger the identified population to run through batch EDBC to re-evaluate for the appropriate Medi-Cal program.

2.6.2 Description of Change

1. Create a new batch sweep job that will identify programs for which to trigger Medi-Cal EDBC when all the following are true:
 - a. The individual is an active MEM on aid code '6G' (6G - 250% Working Disabled-Full) for the current and come-up month, as of the day of the batch run.
 - b. The individual has a Customer Options record for 'Working Disabled - Unemployment' that meets the following criteria:
 - i. the Customer Options 'Working Disabled-Unemployment' record(s) are effective from the Medi-Cal program

Redetermination Begin Date up to and including the first day of the targeted Batch EDBC Benefit Month.

1. Count the number of days the Customer Options 'Working Disabled - Unemployment' record(s) was effective from the Medi-Cal program Redetermination Begin Date to the first day of the targeted Batch EDBC benefit month.
 - a. If the number of days is 183 or more then pick up the program for EDBC processing.
2. Insert the identified Medi-Cal program into SYS_TRANSACT for Batch EDBC processing for the come-up month in Targeted Program mode for all MC programs with the SUB_TYPE_CODE created in Recommendation 2.6.2.3.

3. Add a new SUB_TYPE_CODE in CT_942 - Batch Eligibility Sweep Codes for this batch job. This code detail will also be used as a Journal Entry when Batch EDBC ran on a case.

Batch EDBC Sweep Code	Description
New/Update	New
Category Id	942
Short Decode Name	Working Disabled - End of 26 weeks of Unemployment
Long Decode Name	Working Disabled - End of 26 weeks of Unemployment
Begin date	Default / System Min Date / 01-JAN-00 00:00:00
End date	Default / System High Date /31-DEC-99 00:00:00

2.6.3 Execution Frequency

This sweep job will be a new Monthly job that will run on a specific date around the middle of the month (MNTLY10BAF)

Note: MNTLY10BAF = Monthly one calendar day after the EDR Sweep jobs schedule. If the day falls on Sunday or Holidays the job will run on the next batch run date.

Reminder: This Batch process does not target MAGI Medi-Cal individuals nor sends a new EDR for a MAGI Medi-Cal redetermination. Medi-Cal EDBC rules will use the valid DER already in the case, if applicable.

2.6.4 Key Scheduling Dependencies

Schedule this batch job to run as a predecessor to the Batch EDBC.

2.6.5 Counties Impacted

All CalSAWS counties.

2.6.6 Data Volume/Performance

Not Available

2.6.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.7 [Automated Regression Test]





2.7.1 Overview

[Provide an overview of the automated regression test that needs to be updated.]

2.7.2 Description of Change

1. [Provide a detailed description of what needs to be updated in the automated regression test.]
 - a. Sub point (if needed)
 - i. additional sub point (if needed)
 1. Additional sub point (if needed)
2. Next Change (if needed)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
ACWDL 19-12	Eligibility	Working Disabled eligibility clarifications	 ACWDL 19-12.pdf
ACWDL 11-38	Eligibility	Instructions for Implementing the Less Restrictive Provisions of AB 1269 for 250% Working Disabled Program	 ACWDL 11-38.pdf
MEPM 5R	Eligibility	Medi-Cal Eligibility Procedures Manual: 5R – 250% Working Disabled Program	 5R MEPM.pdf
ACWDL 17-03	Eligibility	Revised Medi-Cal Hierarchy	 ACWDL 17-03.pdf

4 OUTREACH

Include a list of Active Non-MAGI Medi-Cal individuals who meet preliminary Working Disabled criteria who also have income for 'Social Security Retirement', 'Veterans Disability – partial', or IHSS 'Wages - Caregiver For Spouse/Minor' or 'Caregiver Wages – Other'.

List Name: Potential Working Disabled

List Criteria: A list of individuals who are Active on Non-MAGI Medi-Cal who meet all the following criteria:

- Active MEM in one of the following Non-MAGI Medi-Cal aid codes:
 - 13, 14, 17, 1H, 23, 24, 27, 34, 37, 63, 64, 67, 6G, 6H, 82, 83, 86, 87
- Individual is 'enrolled in a work activity'
 - 'Enrolled in a work activity' is when the individual has high-dated income from either:
 - 'Earnings' category, or
 - IHSS 'Wages - Caregiver For Spouse/Minor', or
 - IHSS 'Caregiver Wages – Other'
- Has high-dated Medical Condition for SSA Disabled
- Has high-dated income with any one of the following income types:
 - Social Security Retirement
 - Veterans Disability – partial
 - IHSS 'Wages - Caregiver For Spouse/Minor', or
 - IHSS 'Caregiver Wages – Other'

Standard Columns:

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

Additional Column(s):

- CIN
- Person Name (Format is <First Name Last Name>)
- DOB
- Aid Code(s) – if multiple aid codes, display in a comma delimited list on the same row to keep one row per individual
- Social Security Retirement Y/N – If the individual has a high-dated SSR income, then Y; otherwise, N
- IHSS Income Y/N – If the individual has a high-dated IHSS 'Wages - Caregiver For Spouse/Minor' or IHSS 'Caregiver Wages – Other' income, then Y; otherwise, N
- Veterans Disability Partial Y/N – If the individual has a high-dated 'Veterans Disability – partial' income, then Y; otherwise, N

Frequency: One-time

County Action: Review the list to determine if individuals listed as having Social Security Retirement (SSR) should have their income record updated to indicate that the social security income was converted from Social Security Disability (SSD) to SSR. When SSD is converted to SSR, the income is exempt in the 250% Working Disabled Program (WDP). The Veterans Disability - Partial income type is now correctly exempt by the system in the 250% WDP. The IHSS income types are now considered a work activity for the purposes of the 250% WDP. Workers should evaluate individuals on the list, if an individual is eligible to the 250% WDP, the worker should grant the benefits and send a notice of action to the beneficiary.

List Location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2022>CA-209184