

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-236368

Update Non-MAGI Screening Packet Batch Job
to Generate only when the Soft Pause is New

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1 OVERVIEW

CalSAWS CA-58123 added a new Batch EDBC Skip reason to skip the Medi-Cal program from Batch EDBC processing when the Determination Eligibility Response (DER) used in Batch EDBC has at least one individual with Eligibility Evaluation Reason of 'Soft Pause'. The Non-MAGI Screening Packet Forms Trigger Sweep job will generate the Non-MAGI Screening Packet when a program is skipped for 'Soft Paused'.

CalHEERS does not provide a reason in the DER why an individual is placed in Soft Pause nor indicates if the Soft Pause is a continuation or new Soft Pause. CalSAWS Medi-Cal EDBC logic will use the valid DER in EDBC, so the same DER may be used in multiple Batch EDBC months, resulting in a Batch Skip for 'Soft Paused' each EDBC benefit month. Or CalHEERS may continue to send Eligibility Evaluation Reason 'Soft Pause' for multiple DERs, month after month, also resulting in Batch EDBC being skipped for 'Soft Paused' month after month.

The Non-MAGI Screening Packet Forms Trigger sweep logic does not detect if the individual has been newly placed in a Soft Pause protection which could result in a Non-MAGI Screening Packet being generated month after month based on the same person remaining in Soft Pause for months.

This SCR will update the Non-MAGI Screening Packet Forms Trigger Sweep (Referred to as the NMSP Sweep) logic to generate a Non-MAGI Screening Packet only when the Medi-Cal program is skipped by Batch EDBC for reason of 'Soft Paused' and the soft pause is new.

1.1 Current Design

Non-MAGI Screening Packets are generated when a Medi-Cal program is skipped from Batch EDBC processing for reason of 'Soft Paused'. Once the Medi-Cal program is skipped, the NMSP Sweep logic checks if the Non-MAGI Screening Packet was already sent for the submit month.

The Sweep job uses the Non-MAGI Screening Packet Sweep Batch date to determine the Non-MAGI Screening Packet Submit Month; the Submit month is equal to the Batch date plus one month.

When Batch EDBC runs for a Medi-Cal program using an older DER with 'Soft Pause' (e.g. COLA, EDBC run in all-programs mode, etc.) and skips for 'Soft Paused', a Non-MAGI Screening Packet would have been previously sent based on that older DER when it was first skipped by Batch EDBC for 'Soft Paused'. The NMSP Sweep logic only checks to see if a Non-MAGI Screening Packet was sent for the Submit Month using the current Sweep job batch date. This causes the Non-MAGI Screening Packet to be generated again for a new submit month based on the newest Batch EDBC skip for 'Soft Paused'.

The Duplicate Medi-Cal EDBC Sweep job attempts to run Medi-Cal EDBC when CalSAWS receives a DER associated to an EDR initiated by the Batch EDR Run Reason "Duplicate Medi-Cal Clean-up." The EDBC Sweep job used to run nightly from 10-day through the first of the following month to attempt to process the DER and Discontinue Medi-Cal. When Batch EDBC skipped the Medi-Cal program for 'Soft Paused', the sweep picked it up each night until the first of the following month. Since the first of the following month would result in a new NMSP submit month, that same DER resulted in two NMSP being generated.

CA-235489 DCR Stored Procedure was implemented as an interim solution to identify on the first of the month, if a Non-MAGI Screening Packet was sent for the prior submit month, if so, the new packet generation record is moved to a 'Failed' status, and a Non-MAGI Screening packet does not get generated.

Examples:

1. Batch EDBC runs on **6/30/2022**. The Medi-Cal program is skipped for reason of 'Soft Paused'. NMSP Sweep job checks to see if a Non-MAGI Screening Packet exists for Submit month of **July**. If a packet exists, a new Non-MAGI Screening Packet will not be generated.
2. Batch EDBC runs on **7/1/2022**. The Medi-Cal program is skipped for reason of 'Soft Paused'. The NMSP Sweep job checks to see if a Non-MAGI Screening Packet exists for Submit month of **July**. If a packet exists, a new Non-MAGI Screening Packet will not be generated.
3. Batch EDBC runs on **7/2/2022**. The Medi-Cal program is skipped for reason of 'Soft Paused'. The NMSP Sweep job checks to see if a Non-MAGI Screening Packet exists for the submit month of **August**. If a packet exists, a new Non-MAGI Screening Packet will not be generated.

Note: If there are multiple MC program blocks, the Non-MAGI Screening Packet will generate for all program blocks if all the Non-MAGI Screening Packet generation criteria is met, regardless if the primary applicant is the same on all of the program blocks.

1.2 Requests

Update the NMSP Sweep logic to identify a Medi-Cal program for generation of a Non-MAGI Screening Packet only when a Non-MAGI Screening packet has not been generated previously for an individual with no break in 'Soft Pause' status.

1.3 Overview of Recommendations

1. Update the NMSP Sweep (PB00R538) to no longer identify a program to generate a Non-MAGI Screening Packet when the Medi-Cal program is skipped from EDBC processing for Eligibility Evaluation Reason of 'Soft Pause' and the previous DER used by EDBC has all the same individuals with an Eligibility Evaluation Reason of 'Soft Pause'.

1.4 Assumptions

1. Non-MAGI Screening Packet generation for a Medi-Cal program that already has a Mixed RE Packet or Non-MAGI Turning 65 Packet will remain unchanged.

2 RECOMMENDATIONS

2.1 Batch Non-MAGI Screening Packet Forms Trigger Sweep (PB00R538)

2.2 Overview

Update the NMSP Sweep job (PB00R538) to no longer identify a program to generate a Non-MAGI Screening Packet when the Medi-Cal program is skipped from EDBC processing for Eligibility Evaluation Reason of 'Soft Paused' when all the same individuals previously had a DER with an Eligibility Evaluation Reason of 'Soft Pause' and there was no 'Soft Pause Lift' in between.

Turn off DCR implemented through CA-235489 stored procedure to remove generation of duplicate Non-MAGI Screening Packets.

2.3 Description of Change

Definitions:

'New DER' – The valid DER for Batch Date with at least one individual in Soft Pause.

'Same' Soft Pause – The Individual had no break in 'Soft Pause' from the prior DER.

'Original Soft Pause DER' – The DER where an individual was placed into the same Soft Pause as the New DER.

Note: The 'New DER' can be the 'Original Soft Pause DER', if an individual had a break in Soft Pause, and is then placed back into a soft pause in the New DER, or if the individual is placed into a Soft Pause for the first time in the New DER.

'New DER Submit Month' – The NMSP Submit Month based on the Initiated Date of the 'New DER'.

- If the 'New DER' Initiated date falls on the first of the month, the 'New DER Submit Month' is equal to the first of the 'New DER' Initiated date month.
- If the 'New DER' Initiated date falls on any day after the first, the 'New DER' Submit month is equal to the first of the 'New DER' Initiated date plus one month.

'Original Soft Pause DER Submit Month' – The Submit Month based on the initiated Date of the 'Original Soft Pause DER'.

1. Update the NMSP Sweep job (PB00R538) to set the Submit Month as follows:
 - a. If the Batch date falls on the first of the month, the Submit month is equal to the first of the Batch month.

- b. If the Batch date falls on any day after the first, the Submit month is equal to the first day of the Batch month plus one month.

This is referred to as the 'Targeted Submit Month'

2. Update the NMSP Sweep job (PB00R538) to identify a program to generate the Non-MAGI Screening Packet when the following conditions are true:
 - a. The Medi-Cal Program is skipped from Batch EDBC due to the reason of 'Soft Paused' between the last success date and batch date, and
 - b. The Medi-Cal EDBC Skip benefit month is come-up month.
And either of the following conditions are true:
 - c. The Soft Pause is new. Or,
 - d. The Soft Pause is not new, but one of the below packets was not already generated on or after the 'Original Soft Pause DER Submit Month'
 - Non-MAGI Screening Packet
 - Non-MAGI Turning 65 Packet
 - Mixed RE Packet
3. Exclude the identified program if the program is already in SYS-TRANSACTION to generate one of the below packets for the Submit month in Recommendation 2.1.2.1, or one of the below packets was already generated on or after the 'New DER Submit Month'.
 - Non-MAGI Screening Packet,
 - Non-MAGI Turning 65 Packet or
 - Mixed RE Packet.

Technical Note: For each program returned in the driving query, insert one record into the batch transaction table to generate a Non-MAGI Screening Packet during forms processing.

Note: CASE_ID, PGM_ID, SUB_TYPE_CODE, EFF_DATE, CREATED_BY and UPDATED_BY fields will be same as mentioned in the SCR CA-58123.

4. As of the go-live of CA-236368, turn off stored procedure PB19C624.

Examples:

Scenario 1: Individual remains in Soft Pause month after month

Pre-condition

- **05/10/2022**, DER with Initiated Date **05/10/2022** with an individual in 'Soft Pause', is run in batch EDBC for Benefit month (**06/2022**) and is skipped for skip reason of 'Soft Paused' and Non-MAGI Screening Packet is generated for Submit month of **06/2022**.

Scenario

- **03/04/2023**, Batch MAGI sends a new EDR for Benefit month **04/2023**; DER returns with the same individual in 'Soft Pause'.
- **03/05/2023**, Medi-Cal program is run in batch EDBC for Benefit month of **04/2023** and is skipped for skip reason of 'Soft Paused'
- **03/05/2023** NMSP Sweep job runs with Target Submit month **04/2023** and confirms the following:
 - The program was skipped for 'Soft Paused'
 - The Batch EDBC Benefit month attempted is Come-Up month **(04/2023)**
 - The 'New DER Submit Month' is **04/2023**
 - The 'Original Soft Pause DER' Benefit Month is **06/2022**
 - The individual in 'Soft Pause' in the New DER Benefit month **(04/2023)** was previously in 'Soft Pause' in the Old DER Benefit month **(06/2022)**. No new individuals were placed in 'Soft Pause' in the New DER Benefit month **(04/2023)**.
- MC program is not identified for Non-MAGI Screening Packet generation because there is no new individual in 'Soft Pause'; NMSP not generated.

Scenario 2: First time in Soft Pause in New DER run for Come-Up month

Pre-Condition:

- **10/2/2022** DER received from CalHEERS with no individual in 'Soft Pause' for Benefit month **(11/2022)**.

Scenario:

- **03/04/2023**, Batch MAGI sends an EDR for Benefit month **04/2023** to CalHEERS and receives a DER with an individual in 'Soft Pause'.
- **03/05/2023**, Medi-Cal program is run in batch EDBC for Benefit month of **04/2023** and is skipped for skip reason of 'Soft Paused'.
- **03/05/2023** NMSP Sweep job runs with Target Submit month **04/2023** and confirms the following:
 - The Program was skipped for 'Soft Paused'.
 - The Batch EDBC Benefit Month attempted is for Come-Up month **(04/2023)**
 - the 'New DER' Submit Month is **04/2023**
 - The 'New DER' for Benefit month **(4/2023)** has at least one individual in a 'Soft Pause' and there is no 'Original Soft Pause DER'. The 'New DER' is the 'Original Soft Pause DER'.
 - There is no NMSP, Turning 65 or Mixed RE Packet planned to generate for Targeted Submit month **(04/2023)**
 - NMSP will be generated for Submit Month **04/2023**.

Scenario 3: Batch EDBC ran with an old DER for the Come-Up month

Pre-condition

- **09/05/2022** Worker sends an EDR for Benefit month **10/2022** to CalHEERS and DER returns with an individual in 'Soft Pause'.
Worker does not send out the NMSP
- **11/02/2022** Batch MAGI sends an EDR for Benefit month **12/2022** to CalHEERS and DER returns with same individual in 'Soft Pause'.
- **11/03/2022** Batch EDBC is run in 'All Programs' mode for Come-Up month of **12/2022** and was skipped for reason of 'Soft Paused'. The Non-MAGI Screening Packet was generated for Submit month of **12/2022**.

Scenario

- **03/05/2023**, Batch EDBC is run in 'All Programs' mode for Come-Up month of **04/2023**, and the Medi-Cal program was skipped for reason of 'Soft Paused'.
- **03/05/2023** NMSP Sweep job runs with Target Submit month **04/2023** and confirms the following:
 - The program was skipped for 'Soft Paused'.
 - The Batch EDBC Benefit month attempted is for come-up month **(04/2023)**
 - There is no DER for Benefit month **04/2023**, so the 'New DER' is the DER for Benefit month **12/2022** with Initiated Date **11/2/2022**
 - The 'New DER Submit Month' is **12/2022**
 - The 'Original Soft Pause DER' Benefit Month' is **10/2022**
 - The 'Soft Pause' in the 'New DER' Benefit month **(12/2022)** is the same in the 'Original Soft Pause DER' Benefit month **(10/2022)**.
 - The NMSP was generated for 'New DER Submit Month' of **12/2022**.
 - The NMSP will not be generated since there is no new 'Soft Pause'.

Scenario 4: NMSP Packet already generated based on DER used in Batch EDBC.

Pre-condition

- **05/02/2022** DER for benefit month of **06/2022** with no individual in 'Soft Pause'.
- **09/27/2022** Worker sends EDR for benefit month **11/2022**. DER for benefit month **11/2022** received from CalHEERS with 'Soft Pause'. Worker generates Non-MAGI Screening packet with Submit month **10/2022**.
- **11/01/2022** Non-MAGI Screening Packet is not returned, but no Negative Action occurs due to PHE.

Scenario:

- **03/05/2023**, Medi-Cal program is run in batch EDBC for Benefit month of **04/2023** and is skipped for skip reason of 'Soft Paused'.
- **03/05/2023**, NMSP Sweep job runs with Target Submit month **4/2023** and confirms the following:
 - The program was skipped for 'Soft Paused'
 - The Batch EDBC Benefit month attempted is Come-Up month (**04/2023**)
 - There is no DER for benefit month **4/2023** so the 'New DER' is the DER for benefit month **11/2022** with Initiated Date **9/27/2022**.
 - The 'New DER Submit Month' is **10/2022**
 - The 'New DER' for Benefit month (**10/2022**) has at least one individual in a 'Soft Pause' and there is no 'Original Soft Pause DER'. The 'New DER' is the 'Original Soft Pause DER'
 - There is no NMSP, Turning 65 or Mixed RE Packet planned to generate for the Targeted Submit month (**04/2023**)
 - There is a NMSP already generated on or after 'New DER Submit month' (**10/2022 or later**)
 - A NMSP will not be generated for Submit month **04/2023** because a NMSP was already generated for the DER used in Batch EDBC.

Scenario 5: Old NMSP exists. Subsequent online DER received with new Soft Pause but worker did not send NMSP. Case is picked up in batch and Skips for Soft Pause.

Pre-Conditions

- On-going case with 3 people on MAGI.
- **03/03/2022** - DER for Benefit Month **04/2022** has P3 with Soft Pause. NMSP was sent out with Submit Month **04/2022**.
- **04/15/2022** – Worker received NMSP, lifted Soft Pause for P3 and DER for Benefit Month **05/2022** with MAGI Discontinue and Soft Pause Lift for P3. EDBC processed and P3 Discontinued.
- **06/10/2022** – Online DER received for Benefit month **07/2022** with P2 in 'Soft Pause'.
Worker did not send out the NMSP for this DER.

Scenario:

- **10/03/2022**, Medi-Cal program is run in batch EDBC for Benefit month of **11/2022** and is skipped for skip reason of 'Soft Paused'.
- NMSP Sweep job sweep runs with Target Submit month **11/2022** and confirms:
 - the program was skipped for 'Soft Paused'
 - The batch EDBC Benefit month attempted is for come-up month (**11/2022**)

- There is no DER for benefit month **11/2022**, so the 'New DER' is the DER for benefit month **07/2022** with Initiated Date **06/10/2022**
- The 'New DER Submit Month' is **07/2022**
- The 'New DER' for Benefit month (**10/2022**) has at least one individual in a 'Soft Pause' and there is no 'Original Soft Pause DER'. The 'New DER' is the 'Original Soft Pause DER'
- There is no NMSP, Turning 65 or Mixed RE Packet planned to generate for the Targeted Submit month (**11/2022**)
- There is no NMSP, Turning 65 or Mixed RE Packet generated on or after 'New DER Submit Month' (**07/2022 or later**)

A NMSP will be generated for Targeted Submit month (**11/2022**) because even though the 'New DER' with a new Soft Pause is for an older benefit month, a NMSP was never generated for it.

Scenario 6: Turning 65 packet was generated for same submit month as 'New DER Submit Month'.

Pre-Condition:

- Case with two MAGI individuals.
- **08/05/2022** DER for Benefit month (**09/2022**) received online with no individual in 'Soft Pause'.
- **10/2022** - P2 is turning 65.
- **09/15/2022** Turning 65 Packet generated with Submit month of (**10/2022**)

Scenario:

- **09/16/2022** DER for **10/2022** benefit month is received online with Soft Pause.
Worker does not generate NMSP.
- **10/03/2022** Medi-Cal program is run in batch EDBC for benefit month of **11/2022** and is skipped for skip reason of 'Soft Paused'.
- **10/03/2022** NMSP sweep runs with Target Submit month **11/2022** job confirms the following:
 - the program was skipped for 'Soft Paused'
 - The Batch EDBC Benefit month attempted is for come-up month (**11/2022**)
 - There is no DER for benefit month **11/2022** so the 'New DER' is the DER for benefit month **10/2022** with Initiated Date **09/16/2022**.
 - The 'New DER Submit Month' is **10/2022**
 - The 'New DER' for Benefit month (**10/2022**) has at least one individual in a 'Soft Pause' and there is no 'Original Soft Pause DER'. The 'New DER' is the 'Original Soft Pause DER'
 - There is no NMSP, Turning 65 or Mixed RE Packet planned to generate for Targeted Submit month (**11/2022**)

- There is a Turning 65 packet generated on or after the 'New DER Submit Month' (**10/2022**)

A NMSP will not be generated for Submit month **11/2022** because a Turning 65 packet was already generated for the program after the DER used in Batch EDBC was received.

2.4 Execution Frequency

No Change

2.5 Key Scheduling Dependencies

No Change

2.6 Counties Impacted

All

2.7 Category

Core

2.8 Data Volume/Performance

No Change

2.9 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc....)

3 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'.

