

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-251565

One-time Batches to Transition Adults (26 thru  
49years old) from Restricted to Full Scope

Medi-Cal

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
01/25/2023	0.1	Original Draft	Sireesha Kommajosyula

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# 1 OVERVIEW

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This SCR will automate the transition of individuals who are 26 thru 49 years old, inclusive, currently in restricted scope Medi-Cal to full scope MAGI Medi-Cal with a one-time batch process.

## 1.1 Current Design

In CalHEERS Release 23.9 and in CalSAWS Release 23.09, CalHEERS and CalSAWS were updated to grant full scope Medi-Cal for individuals 26 thru 49 years old, inclusive, regardless of satisfactory citizenship or immigration status if they meet all other eligibility criteria for the benefit month starting January 2024 with CA-251562 and CalHEERS Change Request CH-210202. This population is referred to as “Adult Expansion”.

CalSAWS has individuals who are 26 thru 49 years old, inclusive, still receiving restricted scope Medi-Cal who should be transitioned to full scope Medi-Cal.

CalSAWS Batch EDBC functionality allows Batch EDBC to automatically add a standard Journal entry to cases processed by Batch EDBC with:

**Journal Category:** Eligibility

**Journal Type:** Batch EDBC

**Short Description:** Batch EDBC ran for [MONTH/YEAR].

**Long Description:** Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: <Batch EDBC Sweep Code Short Description>

There is no Batch EDBC Sweep Code for Adult Expansion one-time transition batch processing, so CalSAWS will automatically create the journal entry with a missing reason in the Long Description.

## 1.2 Requests

1. Automate the transition of individuals who are 26 thru 49 years old, inclusive, currently receiving restricted scope Medi-Cal to full scope Medi-Cal based on the transition Aid Code Crosswalk provided by DHCS.
2. Add a Batch EDBC Sweep Code so the auto-journal Long Description will display the reason: “Adult Expansion”.
3. Provide one-time County lists for County Eligibility Workers to follow-up on any individuals who remain in restricted scope Medi-Cal or are discontinued from Medi-Cal after the one-time transition batch processing is complete.
4. Generate one-time list to provide county with the statistics.

### 1.3 Overview of Recommendations

1. Initiate a one-time process to send Eligibility Determination Requests (EDRs) to CalHEERS and run Batch EDBC for identified individuals who are 26 thru 49 years of age and receiving restricted scope Medi-Cal to transition to full scope Medi-Cal.
2. Add a Batch EDBC Sweep Code to display the Journal Long Description reason: "Adult Expansion one-time transition batch".
3. Generate one-time County lists to aid the counties to complete the transition of Adult Expansion to full scope Medi-Cal after Batch EDBC completes.
4. Generate a list with number of Individuals who are 26 thru 49 years old, inclusive, targeted for Adult Expansion one-time batch and got transitioned to Full scope/remained in Restricted scope.

### 1.4 Assumptions

1. This one-time batch process includes Medi-Cal programs with an overdue RE or an in-process RE.
2. The RE due date remains unchanged for Medi-Cal programs processed by one-time batch for Adult Expansion
3. No Change to MEDS

## 2 RECOMMENDATIONS

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### 2.1 One-Time Batch

#### 2.1.1 Overview

Initiate a one-time process to send EDRs to CalHEERS and run Batch EDBC for identified individuals who are 26 thru 49 years of age and receiving restricted scope Medi-Cal to be transitioned to full scope Medi-Cal. Create a Journal entry for the cases processed successfully in the one-time process.

#### 2.1.2 Description of Changes

##### 1. **Batch MAGI**

- a. Identify Medi-Cal programs that meet all the following conditions for one-time Batch MAGI processing:
  - i. The Medi-Cal program contains an individual that meets all the following conditions:
    - l. The individual's 26<sup>th</sup> birthday is on or before 01/31/2024.

- II. The individual is currently receiving any of the following aid codes during the Jan 2024 benefit month:
  - a. A restricted scope adult MAGI Medi-Cal aid code
    - A. Parent/Caretaker Relative: M4
    - B. Pregnant Individual: M0, M8
    - C. Adults 19-64 Years Old: M2, L7
 or
    - b. A restricted scope Non-MAGI Medi-Cal aid code
      - Exclude CMSP aid codes.
  - ii. The program contains at least one MAGI Medi-Cal beneficiary.
  - iii. The CEW has not already processed MAGI and a corresponding Medi-Cal EDBC for Jan 2024 benefit month since the start date of the Adult Expansion rules update in CA-251562.
  - iv. The Medi-Cal EDBC effective Jan 2024 is not an overridden, read-only, or manual EDBC.
- b. Send an EDR for the benefit month of Jan 2024 based on the Medi-Cal program assigned to the most recent EDR. If there is no prior EDR, then assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent DER.

## 2. Batch EDBC

### A. MAGI Medi-Cal and mixed MAGI/Non-MAGI

- a. Identify MAGI Medi-Cal and mixed MAGI/Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
  - i. The DER is received from Recommendation 1 and all the following conditions are true:
    - 1. There are no 'Pending Eligible' MAGI Medi-Cal individuals on the DER.
    - 2. No individual was discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
    - 3. There are no individuals on Soft Pause on the DER.
  - ii. Medi-Cal EDBC has not been processed against the DER from Recommendation 1 or any subsequent DER for the Jan 2024 benefit month.
  - iii. The Medi-Cal EDBC effective Jan 2024 is not an overridden, read-only, or manual EDBC.

- b. Run Batch EDBC for Jan 2024 benefit month for the Medi-Cal program in Targeted Program mode with Type Code "Batch Eligibility" (BE). Include the new Batch EDBC Sweep Code added in Recommendation 2.1.2.3.

**B. Non-MAGI Medi-Cal**

- a. Identify Non-MAGI Medi-Cal cases that meet all the following conditions for one-time Batch EDBC processing:
  - i. The program does not contain a MAGI Medi-Cal beneficiary.
  - ii. The program contains an individual where all the following are true:
    - 1. The individual's 26<sup>th</sup> birthday is on or before 01/31/2024.
    - 2. The individual is currently receiving a restricted scope Non-MAGI Medi-Cal aid code during the Jan 2024 benefit month.
      - Exclude CMSP aid codes
  - iii. Medi-Cal EDBC has not been processed for Jan 2024 benefit month since the start date of the Adult Expansion rules update in CA-251562.
  - iv. The Medi-Cal EDBC effective Jan 2024 is not an overridden, read-only, or Manual EDBC.
- b. Run Batch EDBC for Jan 2024 benefit month only for the Medi-Cal program in Targeted Program mode with Type Code 'BE' (Batch Eligibility). Include the new Batch EDBC Sweep Code added in Recommendation 2.1.2.3.

**3. Journal Entry**

- a. Add Batch EDBC Sweep Code (CT\_942) for "Adult Expansion one-time transition batch" to the code table.

Code Table	Description
New/Update	New
Category Id	942
Short Description	Adult Expansion
Long Description	Adult Expansion one-time transition batch

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.1.2.2.

**Journal Category:** Eligibility  
**Journal Type:** Batch EDBC

**Short Description:** Batch EDBC ran for 01/2024.

**Long Description:** Batch EDBC ran for 01/2024. Batch EDBC processed for the Medi-Cal program for the following reason: Adult Expansion one-time transition batch.

### 2.1.3 Execution Frequency

This is a one-time batch.

### 2.1.4 Key Scheduling Dependencies

- **Tuesday 11/21/2023**  
Batch operations team will run the Data Change Request (DCR) for Batch MAGI before regularly scheduled batch. Then Tuesday's regularly scheduled batch will send the EDRs during Batch MAGI.
- **Wednesday 11/22/2023**  
Batch operations will run the DCR for Batch EDBC before regularly scheduled batch processing. On the same day the nightly scheduled batch will process the above DCR picked cases through Batch EDBC

Batch Operations will repeat this process nightly on business days until November 30,2023 to process DERs returned.

### 2.1.5 Counties Impacted

All counties


### 2.1.6 Data Volume/Performance

Approximately 680K individuals will be processed with this change. At least one Notice of Action is expected for each of the cases processed in Batch EDBC.



### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 23-08	 ACWDL 23-08.pdf

### 4 OUTREACH

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1. Generate one-time County lists to aid the counties to complete the transition of Adult Expansion to full scope Medi-Cal after Batch EDBC completes.

The lists will display the below columns:

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

List will be posted at following locations:

CalACES Web Portal>System Changes>SCR and SIR Lists>2024>CA-251565

1. **List Name:** Medi-Cal Program Discontinued

Generate a list of cases where the Medi-Cal program was discontinued due to the one-time Batch EDBC processing for Adult Expansion transition to full scope.

**County Action:** These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate. If the closure was not accurate, restore the individuals on the case to the appropriate full scope aid code.

2. **List Name:** Medi-Cal Individual Discontinued

Generate a list of cases where an individual was discontinued from the Medi-Cal program due to the one-time Batch EDBC processing for Adult Expansion transition to full scope.

**Additional Columns:**

- CIN
- Prior Aid Code – *Display the aid code the individual was on prior to the discontinuance.*

- DOB

**County Action:** These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close individuals, review these cases to verify the closure was accurate. If the closure was not accurate, restore the individual to the appropriate full scope aid code.

3. **List Name:** Adult Expansion remains in restricted scope  
Generate a list of cases where an individual having 26 thru 49 years old, inclusive, remains in restricted Medi-Cal after the one-time Batch EDBC processing for Adult Expansion completes.

**Additional Columns:**

- CIN
- Aid Code
- DOB

**County Action:** Evaluate the case and transition the individual into the appropriate full scope aid code. Send a Notice of Action.

4. **List Name:** Adult Expansion statistics  
Generate one-time list to provide county with the statistics.

**Criteria:** Generate a list with number of Individuals who are 26 thru 49 years old, inclusive, targeted for Adult Expansion one-time batch and got transitioned to Full scope/remained in Restricted scope

The list will display the below columns:

- County
- Total Targeted Population
- Individuals moved to Full scope
- Individuals remained in Restricted scope
- Percent successful

Note: Percent successful is calculated as total Individuals moved to full scope by total targeted population

- Count of Notice of Actions generated

**County Action:** This list is informational. Counties can review and use as appropriate.

## 5 REQUIREMENTS

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### 5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant's/participant's eligibility for a program or programs.	CalSAWS will automate the transition of individuals ages 26-49, inclusive, currently in restricted scope MAGI Medi-Cal to full scope MAGI Medi-Cal with a one-time batch process.