[CA-261924] Allow additional COR Changes and Case Linkage Updates

Issue Type:	**SCR**	Team Responsible:	**CalHEERS**	Assignee:	**Unassigned**		
Fix Version/s:	**[TBD]**	Designer Contact:		Change Type (SCR):	**Enhancement**		
Minor Version:		Expedite Changes:	**No**	Estimate:			
Reporter:	**Maggie Orozco-Vega**	Regulation Reference:		Created:	**05/18/2023 11:35 AM**		
Status:	**New**	Impact Analysis:		Outreach Required:			
Policy/Design Consortium Contact:	**Maureen Votta**	Training Impacted:		Funding Source:			
Project Phase (SCR):	**Production**	Funding Source ID:					
Other Agency Cross Reference:							

Current Design:

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. Although case linkage updates were introduced with CA-221711, in some instances the COR between CalSAWS and MAGI case remains locked in CalHEERS when the MAGI case is inactive. This results in the user receiving a Validation Error indicating that CalHEERS cannot process the EDR because the current COR is another county.

In addition, when a referral is received for a case that has prior linkage to another MAGI case, the user is unable to link the referral to the CalSAWS case (when following the linking flow), even though the prior MAGI case is inactive.

Request:

Update functionality to allow users to update the COR when a MAGI case had previously been with another county but is not currently active.

Update functionality to allow users to link a new CalHEERS referral, when there is existing linkage to an inactive MAGI case.

Update functionality to allow users to request a Matching Bypass Indicator for the primary applicant during the Case Linkage Override.

Recommendation:

1. Add an indicator to the Case Linkage Update EDR to update the COR when the county sending the EDR is different than the current COR and the MAGI case is inactive.

2. Remove the following validation error when a CalHEERS referral is being linked to a case with prior linkage to another MAGI case and the MAGI case is inactive: The selected case is already linked to the CalHEERS Case. Please select a different case or create a new one.

Outreach Description:

Operational Impact: