

CalSAWS

California Statewide Automated Welfare System



CA-213317

Enhance Medi-Cal Rescind Functionality

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CA-213317 – Enhance Medi-Cal Rescind Functionality

1 OVERVIEW

1.1 Current Design

When an individual is discontinued from Medi-Cal for 'Failure to Complete Redetermination' due to not returning their Medi-Cal Renewal packet, then subsequently turns in their Medi-Cal Renewal packet before the discontinuance effective date, The System will Auto-Rescind the Medi-Cal discontinuance overnight if the user did not already start the rescission. The Auto-Rescind batch is scheduled to run daily from batch 10-day through the 5th calendar day of the following month. It rescinds individuals who are discontinued for 'Failure to Complete RE' and with a discontinuance date as the first of the month following MC RE Due Date to their prior eligibility based on a 'Reference EDBC' if the Medi-Cal renewal packet is marked 'Received' into The System with a 'Received Date' on or before the last day of the RE Due month.

The current logic to determine the 'Reference EDBC' is limited to a 'System Rescind' that happens as a result of the auto-rescind batch job.

The Current System functionality for a rescind online is not a true rescind; instead, it Pends the Person Application (and Program if applicable), and the user must send a new MAGI Eligibility Determination Request (EDR), wait for a new MAGI Determination of Eligibility Response (DER) and then run Medi-Cal EDBC to determine Medi-Cal eligibility. The Medi-Cal eligibility is determined based on the current case information so the eligibility result may not be the same as rescinding to the eligibility prior to discontinuance. If the user needs to restore to prior eligibility while waiting for additional information from the beneficiary, this requires additional steps like alternate procedures or override the EDBC to put the individual back on their prior eligibility while waiting for the beneficiary to provide the missing items.

The Auto-Rescind batch job creates EDBC's for the Rescind month and the come-up month so that the restored eligibility is high-dated. If the first month EDBC is skipped for any reason, the second month EDBC doesn't always skip for the same reason resulting in inconsistent restored eligibility or a break in aid.

Currently there is no functionality for the user to send an EDR with a 'Rescind' Run Reason online. The Auto-Rescind batch job sends an EDR with Run Reason 'Rescind' and the inbound eHIT logic saves the DER with status 'Suppressed' (if the Batch Indicator 'Yes') because the Rescind EDBC uses the Reference EDBC for eligibility details and the 'Rescind' DER is ignored.

¹ For the purposes of the Auto- Rescind job, a 'Reference EDBC' is defined as the most recent Regular EDBC of the Medi-Cal program for the month prior to the Discontinued benefit month.

1.2 Requests

1. Update the Medi-Cal program to have true rescind functionality for online EDBC.
2. Update the Medi-Cal EDBC rules for Auto-Rescind to use the Reference EDBC for both benefit months run in Batch.
3. Add a Batch EDBC skip to not process Medi-Cal EDBC when the last EDBC is a Rescind EDBC and the EDBC is not run for Auto-Renewal or Auto-Discontinuance.

1.3 Overview of Recommendations

1. Update the Run EDBC page to display a new 'Rescind' option on the Run Reason dropdown for the Medi-Cal program if the Medi-Cal program is rescinded from a Discontinuance and at least one rescinded individual is pending for the Medi-Cal program.
2. Add a soft page validation when 'Rescind' is selected as the Medi-Cal EDBC Run Reason and the Reference EDBC meets criteria that results in the system not generating a NOA upon restoration.
3. Update the MAGI Determination List page to display a "Rescind MAGI Eligibility" checkbox if there is at least one Pending individual on a Medi-Cal program from a Discontinuance Rescind.
4. Medi-Cal EDBC rules will now allow users to perform a true online rescind for discontinued individuals.
5. Update the eHIT webservice to save the 'Rescind' DER with status 'Suppressed' regardless of the EDR being sent through Batch or online.
6. Add a new Batch EDBC Skip to not process a Medi-Cal program when the last EDBC is a Rescind EDBC except when the Batch EDBC was initiated from the MAGI Auto-Renewal or Medi-Cal Auto-Discontinuance sweeps.

1.4 Assumptions

1. Online Rescind EDBC can only be run for one month at a time. If an individual is rescinded three months after the discontinuance and the Medi-Cal program is still Active due to ongoing eligibility for other individuals, then the user must run the Rescind EDBC separately for each month.
2. The user is not required to rescind to prior eligibility when they rescind a Medi-Cal discontinuance online; they have the flexibility to rescind and restore to the prior eligibility – or they can run EDBC based on the updated case information and not select the 'Rescind' run reason.
3. The Medi-Cal renewal date will not be advanced with a 'Rescind' EDBC. The 'Rescind' logic is meant as a temporary restoration of eligibility until the user has the necessary information to complete the renewal. The user must run Medi-Cal EDBC with 'RE' Run reason to run through the entire Medi-Cal EDBC Rules and advance the renewal date.

4. CalHEERS Project does not currently have special logic for 'Rescind' Run Reason when receiving EDRs. CalHEERS treats an EDR with the 'Rescind' Run Reason as the same as a 'Continuing' EDR. For the purposes of this change, the EDR with the 'Rescind' Run Reason is for tracking and removing the Negative Action in CalHEERS.

2 RECOMMENDATIONS

2.1 Run EDBC Page

2.1.1 Overview

Update the Run EDBC page to display a new 'Rescind' option on the Run Reason dropdown for the Medi-Cal program if the Medi-Cal program is rescinded from a Discontinuance and at least one rescinded individual is pending for the Medi-Cal program.

Add a soft page validation when 'Rescind' is selected as the Medi-Cal EDBC Run Reason and the Reference EDBC meets criteria that results in the system not generating a NOA upon restoration.

2.1.2 Run EDBC Page Mockup

The mockup shows the 'Run EDBC' page with a title bar and a legend indicating that asterisks (*) denote required fields. There are three buttons at the top right: 'Change Reason', 'Run EDBC', and 'Cancel'. Below the legend, the 'Benefit Processing Range' section contains 'Begin Month' and 'End Month' dropdowns, both set to '03/2025'. A table with five columns is present: 'Program', 'Status', 'Timely Notice Exception', 'Reason', and 'Run Reason'. The first row shows 'Medi-Cal' as the program and 'Active' as the status. The 'Run Reason' dropdown for this row is open, showing 'Rescind' as the selected option. Another 'Rescind' option is visible below the dropdown. At the bottom right, there are three buttons: 'Change Reason', 'Run EDBC', and 'Cancel'.

Program	Status	Timely Notice Exception	Reason	Run Reason
Medi-Cal	Active			Rescind

Figure 2.1.1 – Run EDBC Page

This mockup shows the 'Run EDBC' page after selecting 'Rescind' as the Run Reason. The layout is identical to the previous mockup, but a validation message is displayed below the table. The message states: 'Medi-Cal: This Rescind EDBC run will not generate any notices including the Rescind notice. Please generate any required notices manually. To continue running EDBC, click the "Run EDBC" button.' The message is in red text. At the bottom right, there are three buttons: 'Change Reason', 'Run EDBC', and 'Cancel'.

Medi-Cal: This Rescind EDBC run will not generate any notices including the Rescind notice. Please generate any required notices manually.
To continue running EDBC, click the "Run EDBC" button.

Figure 2.1.2 – Soft Validation

2.1.3 Description of Changes

1. Update the Run EDBC page to populate the Run Reason dropdown for the Medi-Cal program with the reason of "Rescind" when at least one individual has a current status of 'Pending' for the selected benefit month and the associated event is 'Discontinuance Rescinded' (CT157_DR).

Note: The EDBC Run Reason only displays when EDBC is run for a single month.

Technical Note: Update CT744_RS to have MC (REFER_TABLE 7_DESCR) set to 'Y'.

2. Update the Run EDBC page to add a page warning message when the user selects 'Rescind' Run Reason for the Medi-Cal program and clicks 'Run EDBC' and at least one of the below conditions are met:
 - a. The 'Reference EDBC' is a Manual EDBC.
 - b. The 'Reference EDBC' is an overridden EDBC.
 - c. Any individual pending in the Rescind EDBC has an 'Ineligible' person status in the 'Reference EDBC'.

Warning Message: "Medi-Cal: This Rescind EDBC run will not generate any notices including the Rescind notice. Please generate any required notices manually."

Note: This message is a soft validation and will not prevent the user from running Medi-Cal EDBC.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC**

2.1.5 Security Updates

No Changes to Security Rights or Groups.

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

This page has been assessed for Accessibility requirements and meets Accessibility standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 MAGI Determination List Page

2.2.1 Overview

Update the MAGI Determination List page to display a “Rescind MAGI Eligibility” checkbox if there is at least one Pending individual on a Med-Cal program from a Discontinuance Rescind.

2.2.2 MAGI Determination List Page Mockup

The mockup displays the 'MAGI Determination List' interface. It includes a 'Request MAGI Determination' section with fields for 'Begin Month' (01/2025), 'End Month' (04/2025), 'Program Identifier' (Medi-Cal), and a 'Life Change Event' dropdown. A 'Rescind MAGI Eligibility' checkbox is highlighted with a red box. Below this are four unchecked checkboxes: 'Bypass Primary Contact Matching Criteria', 'Request Lift Options', 'Request Negative Action Determination', and 'Restart VLP e-Verification'. A 'Request MAGI' button is located to the right. The 'Display MAGI Determinations' section features 'Begin Date' and 'End Date' fields with calendar icons. A 'View' button is positioned to the right. The 'Search Results Summary' section shows 'Results 1 - 1 of 1' and a table with the following data:

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
01/2025	Determination	Complete	11/21/2024 11:12 AM	CalSAWS	Not Eligible

Figure 2.2.1 –MAGI Determination List Page

2.2.3 Description of Changes

1. Update the MAGI Determination List page to display a “Rescind MAGI Eligibility” checkbox when at least one individual has a current Medi-Cal person status of Pending for the selected benefit month(s) and the event associated to the Pending status is 'Discontinuance Rescinded' (CT157_DR).

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: MAGI Eligibility**

2.2.5 Security Updates

No Changes to Security Rights or Groups.

2.2.6 Page Mapping

Add Page mapping for the new "Rescind MAGI Eligibility" checkbox.

2.2.7 Accessibility

This page has been assessed for Accessibility requirements and meets Accessibility standards.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Medi-Cal Eligibility Rules Updates

2.3.1 Overview

Medi-Cal EDBC rules will now allow users to perform a true rescind for online Rescind Discontinuances.

2.3.2 Description of Changes

1. Update the Medi-Cal EDBC rules to copy over the passing budgets from the 'Reference EDBC' for the rescinded individual(s) when EDBC is run online for the Medi-Cal program with the 'Rescind' Run Reason and the individual is Pending from a Discontinuation Rescind event.
 - a. None of the budget hyperlinks will display since these are copied budgets.
 - b. Leverage the Medi-Cal EDBC logic to determine the 'Reference EDBC' added with SCR CA-202862 except expand to include a Discontinuation Rescind for any reason and not limit to only a 'System Rescind'.
2. Update the Medi-Cal EDBC rules to copy over the passing budgets from the saved and accepted Regular EDBC for the same benefit month for the non-rescinded individuals when EDBC is run online for the Medi-Cal program with Rescind Run Reason.
 - a. None of the budget hyperlinks will display since these are copied budgets.

2.3.3 Programs Impacted

Medi-Cal

2.3.4 Performance Impacts

N/A

2.4 EHIT Updates

2.4.1 Overview

Update the eHIT webservice to save the 'Rescind' DER with the status 'Suppressed' regardless of if the EDR being sent through Batch or online.

2.4.2 Description of Changes

1. Update DER Webservice to save a DER with the status 'Suppressed' if the DER has the Run Reason Code 'Rescind' regardless of if the EDR being sent in Batch or online.
2. Update the EDR logic to set the Run Reason to 'Rescind' (CT395_RC) if the user checks the box for "Rescind MAGI Eligibility" on the MAGI Determination List page and clicks 'Request MAGI'.
 - a. If the user selects both 'Rescind MAGI Eligibility' and a Negative Action, then the Run Reason will be set to 'Negative Action'.

2.4.3 Programs Impacted

Medi-Cal

2.4.4 Performance Impacts

N/A

2.5 Batch EDBC Skip

2.5.1 Overview

Add a new Batch EDBC Skip to not process a Medi-Cal program when the last EDBC is a Rescind EDBC except when the Batch EDBC was initiated from the MAGI Auto-Renewal or Medi-Cal Auto-Discontinuance sweeps.

2.5.2 Description of Change

1. Add a new Batch EDBC Not Processed Reason (CT707) to skip a Medi-Cal program when all following are true:
 - a. The High dated EDBC has a Run Reason Code of 'Rescind' (CT744_RS).
 - b. The EDBC is for the Medi-Cal program.
 - c. The Medi-Cal program is Active for the targeted EDBC benefit month. The Batch Medi-Cal EDBC was not initiated by the MAGI Auto-Renewal Sweep (PB00E120), or the Medi-Cal Auto-Discontinuance Sweeps (PB00E121 or PB00E182).

Not Processed Reason Code (CT707)

Short Decode Name	EDBC has not been run since Rescind
Long Decode Name	EDBC has not been run since Rescind

Examples:

- A. The Medi-Cal program has a high-dated EDBC with Run Reason 'Rescind' with the begin month 01/2025. A MAGI Age sweep identified the Medi-Cal program for Batch EDBC processing for 05/2025. Batch EDBC will skip this program for the reason 'EDBC has not been run since Rescind'.
- B. The Medi-Cal program has a high-dated EDBC with Run Reason 'Rescind' with the begin month 08/2025. The SSA COLA identified the Medi-Cal program for Batch EDBC processing for 01/2026. Batch EDBC will skip this program for the reason 'EDBC has not been run since Rescind'.
- C. The Medi-Cal program has a high-dated EDBC with Run Reason 'Rescind' with the begin month 03/2025. The MAGI Auto-Renewal sweep identified the Medi-Cal program for Batch EDBC processing for 02/2026. Batch EDBC will NOT skip this program for the reason 'EDBC has not been run since Rescind' and will allow Batch EDBC to process the case.

2.5.3 Counties Impacted

All Counties.

2.6 Automated Regression Test

2.6.1 Overview

Create new automated regression test scripts to verify Run Reason 'Rescind' availability and soft validation on the Run EDBC page in an applicable scenario.

2.6.2 Description of Change

1. Create regression scripts to verify each of the following:
 - a. Run Reason 'Rescind' can be selected on the Run EDBC page when at least one person is in Pending status for the benefit month and the associated event is 'Discontinuance Rescinded'.
 - b. A soft validation message displays on the Run EDBC page when the Run EDBC button is clicked and:
 - i. Run Reason 'Rescind' is selected
 - ii. The reference EDBC is a Manual EDBC
 - c. The 'Rescind MAGI Eligibility' checkbox can be selected on the MAGI Determination List page when at least one person is in Pending status for the benefit month and the associated event is 'Discontinuance Rescinded'.