

CalSAWS

California Statewide Automated Welfare System



CA-279547

BREfS #7 – Carry Forward Enhancements

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Updated Design per feedback provided:

- Added recommendations 2.3.3.3 and 2.3.3.4 to display Carry Forward information on the MAGI Referral Detail Page
- Added assumptions

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Submitted for Final Design Review with Medi-Cal Analysts

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1 OVERVIEW

When a Covered California consumer reports a decrease of income which would otherwise make them potentially eligible for the Modified Adjusted Gross Income (MAGI) Medi-Cal program, CalHEERS places the consumer into a Carry-Forward Status pending a Medi-Cal determination. The Carry Forward Status protects the consumer from losing health insurance through Covered California until a MAGI Medi-Cal determination can be made. Once the individual is placed in a Carry Forward Status, CalHEERS freezes the Covered California eligibility for the current month which is called the 'Transition' month then sends an Unsolicited Determination Eligibility Response (DER-U) to CalSAWS.

The County Eligibility Worker (CEW) reviews the DER information from CalHEERS. If the individual is found eligible for MAGI Medi-Cal, in order to grant the MAGI Medi-Cal eligibility, the CEW performs a series of Eligibility Determination Requests (EDR's). First the CEW must request CalHEERS to lift the Carry Forward Status for the prospective month of the eligibility request. Once the Carry Forward has been lifted the CEW is then able to request MAGI eligibility for 'Transition' month.

CalHEERS CR 216717 updated the Carry Forward Status logic in CalHEERS to no longer require eligibility to be established prospectively before allowing the transition month to be granted. CEW's no longer need to perform a series of transactions to grant the MAGI Medi-Cal eligibility from the 'Transition' month forward. Once an individual has reported a change in income that would otherwise make them potentially eligible for MAGI, CalHEERS will place a 'Carry Forward Status' on the individual and place the individual in an 'Awaiting Review' status and provide the potential eligibility results. CEW's will no longer need to request a 'Carry Forward' lift.

This SCR will update CalSAWS in support of the changes with CalHEERS Change Request (CR) 216717.

1.1 Current Design

Once an individual reports a decrease of income in CalHEERS, that would otherwise make them potentially eligible for MAGI Medi-Cal, CalHEERS places the individual in a 'Carry Forward Status' protection for the Covered California eligibility beginning with the 'Transition' month and Pends eligibility for MAGI Medi-Cal then communicates this change through a Referral to CalSAWS.

The CEW reviews the DER-U information to determine if the individual meets the MAGI Medi-Cal eligibility criteria and if so, sends a series of EDR's to CalHEERS to establish the MAGI Medi-Cal eligibility. First, an EDR is sent for the 'Prospective' month of eligibility

along with a 'Carry Forward' lift indicator (see screen shot below). Once eligibility has been established for the prospective month and the Carry Forward has been removed, the CEW then sends another EDR to CalHEERS to establish eligibility for the 'Transition' month.

MAGI Determination List

*- Indicates required fields

Request MAGI Determination

Begin Month: * 05/2023 ▼ End Month: * 10/2023 ▼

Program Identifier: * Medi-Cal ▼

Life Change Event: ▼

☐ Bypass Primary Contact Matching Criteria

☒ Request Lift Options

Soft Pause Lift	Carry Forward Lift	Name	SSN	Date of Birth
<input type="checkbox"/>	<input type="checkbox"/>	Janice Koffman		02/14/2023
<input type="checkbox"/>	<input type="checkbox"/>	Jennifer Juff	552114521	10/15/2000

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Current MAGI Determination List Page – Carry Forward Lift Option

When CalSAWS receives a Referral from CalHEERS and an individual has a 'Carry Forward Status' on the DER-U, the only way to identify the Carry Forward Status is through the Eligibility Evaluation Reason Code (EERC) provided for the individual indicating they are in a Carry Forward Status.

1.2 Requests

Update CalSAWS to no longer send the Carry Forward Lift indicator to CalHEERS to request the removal of the 'Carry Forward' status.

Update the MAGI Request Detail page to allow user to navigate to the MAGI Determination List page to view Carry Forward Status information for individual's placed in Carry Forward.

Add a Batch skip to skip cases from being sent to CalHEERS for a reevaluation when at least one individual is in 'Carry Forward' and 'Awaiting Review' status is 'Yes'.

1.3 Overview of Recommendations

1. Update the MAGI Determination List page to remove the Carry Forward Lift option from the Request Lift Options drop down menu.
2. Update the MAGI Request Detail page to remove the Carry Forward Lift column from the Requested Options section.
3. Update the MAGI Referral Detail page to allow user to navigate to the MAGI Determination Summary page to review Carry Forward information.

4. Update Batch MAGI to skip a case from processing through batch when an individual is in a 'Carry Forward Status' and 'Awaiting Review'.

1.4 Assumptions

1. There are no changes on how Carry Forward Status information is received in a DER from CalHEERS and displayed on the MAGI Referral Search page with this change.
2. Current County business process for processing DER's received with individuals in a Carry Forward Status due to updates to the CalHEERS renewal for the following year will **not** be changed with this update. Example: When an individual is placed in Carry Forward Status during the CalHEERS annual renewal and a DER is received for the following Calendar year, workers will continue to process the DER based on the current business process.

2 RECOMMENDATIONS

2.1 MAGI Determination List page

2.1.1 Overview

Update the MAGI Determination List page to remove the Carry Forward Lift option from the Request Lift Options drop down menu.

2.1.2 MAGI Determination List page Mockup

The mockup shows the 'MAGI Determination List' page. It includes a legend for required fields (*), a 'Request MAGI Determination' section with fields for 'Begin Month' (05/2023), 'End Month' (10/2023), 'Program Identifier' (Medi-Cal), and 'Life Change Event'. Below this is a table with columns 'Soft Pause Lift', 'Name', 'SSN', and 'Date of Birth'. The table lists two individuals: Janice Koffman and Jennifer Juff. Below the table are checkboxes for 'Bypass Primary Contact Matching Criteria', 'Request Lift Options' (checked), 'Request Negative Action Determination', and 'Restart VLP e-Verification'. A 'Request MAGI' button is at the bottom right.

Soft Pause Lift	Name	SSN	Date of Birth
<input type="checkbox"/>	Janice Koffman		02/14/2023
<input type="checkbox"/>	Jennifer Juff	552114521	10/15/2000

Figure 2.1.1 – MAGI Determination List – Removal of Carry Forward Lift Option

2.1.3 Description of Changes

1. Remove the 'Carry Forward Lift' option from the "Request Lift Options" section on the MAGI Determination List page as shown in Figure 2.1.1 above.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Remove the Carry Forward Lift information from the page mapping per recommendation 2.1.3.

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 MAGI Request Detail page

2.2.1 Overview

Update the MAGI Request Detail page to remove the Carry Forward Lift column from the Requested Options section.

2.2.2 MAGI Request Detail page Mockup

Requested Options			
Bypass Primary Contact Matching Criteria: No			
Name	Soft Pause Lift	Negative Action Reason	Restart VLP e-Verification
No Data Found			

Figure 2.2.1 – MAGI Request Detail page Request Options Section

2.2.3 Description of Changes

1. Remove the 'Carry Forward Lift' column from the "Requested Options" section on the MAGI Request Detail page as shown in figure 2.2.1 above.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List -> MAGI Request Detail

2.2.5 Security Updates

No Change

2.2.6 Page Mapping

No Change

2.2.7 Accessibility

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

2.2.8 Page Usage/Data Volume Impacts

No Change

2.3 MAGI Referral Detail page

2.3.1 Overview

Update the MAGI Referral Detail page to allow user to navigate to the MAGI Determination Summary page to review Carry Forward information.

2.3.2 MAGI Referral Detail page Mockup

MAGI Referral Detail

MAGI Case Number: 5000034592	MAGI Case Name: Willis	Initiated Date: 07/10/2025 3:28 PM
Origination: Service Centre Representative, Service Centre Supervisor	Determination ID: 328199	Determination Category: Unsolicited
Case Number:	Case Name:	Request ID:
Determination Type: Referral	Status: * Received	Covered CA Change: No
Run Reason: Intake	Benefit Month: 07/01/2025	Program:

Figure 2.3.1 – MAGI Referral Detail Page with Carry Forward information section

MAGI					
RE Month:			Begin Month: 07/01/2025		
Name	Status	Primary Aid Code	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
PATEL, BBB 35	Eligible	M1	No		Carry Forward - MAGI Medi-Cal Eligible, MAGI Medi-Cal: Awaiting Review, Projected Annual Income Used, Income Limit - Within Range
PATEL, FFF 34F	Ineligible	X1	No		Current Monthly Income Used, Income Limit - Not Within Range
PATEL, AAA 44M	Pending Eligible	X1	No		Carry Forward - MAGI Medi-Cal Pending, Projected Annual Income Used, Income Limit - Within Range

APTC/CSR					
Begin Month: 07/01/2025			CSR: No		
Name	APTC Status	Carry Forward	Carry Forward Begin Date	IAP Transition Begin Date	IAP Transition End Date
PATEL, BBB 35	Conditionally Eligible	Yes	08/01/2025	07/01/2025	
PATEL, FFF 34F	Ineligible	No			
PATEL, AAA 44M	Conditionally Eligible	Yes	08/01/2025	07/01/2025	

Figure 2.3.2 MAGI Referral Detail Page displaying Carry Forward Information

2.3.3 Description of Changes

1. Add a hyperlink to the numerical value of the Determination ID as shown in Figure 2.3.1 as follows.
 - a. Display the hyperlink when the DER is linked to a CalSAWS case.
 - b. When the hyperlink is clicked, navigate user to the MAGI Determination Summary Detail page.
 - i. When user is navigated to the 'MAGI Determination Summary' page from the 'MAGI Referral Detail' page, and clicks the 'Close' button, on the MAGI Determination Summary page return user back to the 'MAGI Referral Detail' page.
2. Update the table columns under the 'MAGI' and 'APTC/CSR' sections to be alternate color format as shown above in Figure 2.3.2.
3. Add a column named 'Primary Aid Code' under the MAGI Section:
 - a. Add the new column after the 'Name' column and before the 'Soft Pause Lift' column.
 - b. Display the primary aid code provided under the 'primaryAIDCode' element provided on the DER.
4. Add the following columns to the APTC/CSR section as follows:
 - a. Add 'Carry Forward' column after the APTC Status column.
 - i. Display the decode value from the 'carryForwardTransitionFlag' element provided on the DER.
 - b. Add 'Carry Forward Begin Date' column after the 'Carry Forward' column.
 - i. Display the date provided in the 'carryForwardBeginDate' element provided on the DER.
 - c. Add 'IAP Transition Begin Date' column after the 'Carry Forward Begin Date' column.
 - i. Display the date provided in the 'iapTransitionBeginDate' element provided on the DER.
 - d. Add 'IAP Transition End Date' column after the 'IAP Transition Begin Date' column.
 - i. Display the date provided in the 'iapTransitionEndDate' element provided on the DER.

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** IAT Summary-> Initiated Date hyperlink

- **Global:** Case Info
- **Local:** e-tools
- **Task:** MAGI Referral Search-> Initiated Date hyperlink

2.3.4 Security Updates

No Changes

2.3.5 Page Mapping

Add the new field names for the 'MAGI' and 'APTC/SCR' sections to Page mapping per recommendation 2.3.3 and 2.3.4 above.

2.3.6 Accessibility

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

2.3.7 Page Usage/Data Volume Impacts

No Change

2.4 Batch MAGI

2.4.1 Overview

Update Batch MAGI to skip a case from processing through batch when an individual is in a 'Carry Forward Status' and 'Awaiting Review'.

2.4.2 Description of Change

1. Add the following Batch MAGI Skip reason to the 'Not Processed Reason' (CT_707)

Not Processed Reason

At least one individual is in Carry Forward with an Awaiting Review status of 'Yes'.
--

2. Update the Batch MAGI Skip logic to skip a case for "At least one individual is in Carry Forward with an Awaiting Review status of 'Yes'" from being picked up by the MAGI Redetermination Sweep job (PB00CH203) when any individual on the case is in a 'Carry Forward' status and 'Awaiting Review' status of 'Yes' on the latest DER.
3. Update the Batch MAGI Skip logic to skip a case for "At least one individual is in Carry Forward with an Awaiting Review status of 'Yes'" from being picked up by the below Age Batch Sweep jobs when any individual on the case is in a 'Carry Forward' status and 'Awaiting Review' status is 'Yes' on the latest DER:
 - a. MAGI Age 1 Sweep (PB00CH208)
 - b. MAGI Age 6 Sweep (PB00CH209)
 - c. MAGI Age 19 Sweep (PB00CH206)
 - d. MAGI Age 65 Sweep (PB00CH211)

2.4.3 Execution Frequency

Monthly

2.4.4 Key Scheduling Dependencies

MAGI Redetermination Sweep:

Predecessor: Batch EDBC

Successor: Batch MAGI

MAGI Age Sweeps:

Predecessor: Batch EDBC

Successor: Batch MAGI

2.4.5 Counties Impacted

All

2.4.6 Category

Core

2.4.7 Data Volume/Performance

No Change

2.4.8 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.)