

CalSAWS

California Statewide Automated Welfare System



CA-285584

SB 311 Phase 2 - SSP only MSP Discontinuances

DOCUMENT APPROVAL HISTORY

Prepared By

Tisha Mutreja

Reviewed By

Chad Quan, Geetha Ramalingam, Lena Lam, Raj Devidi, Sireesha Kommajosyula, Naresh Barsagade, Suneetha Minnekanti, Narendar Sabbani

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

12/06/2024

0.1

Initial Draft

Tisha Mutreja

03/28/2025

0.2

Updated effective date throughout the design since the implementation date was pushed out

Tisha Mutreja

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions.....	2
2	RECOMMENDATIONS	3
2.1	Medi-Cal Eligibility Rules Updates.....	3
2.2	One-Time Batch	4
2.3	Correspondence – DCR to Reject Batch Generated NOAs.....	5
2.4	Automated Regression Test	6
3	SUPPORTING DOCUMENTS	6
4	OUTREACH	6
4.1	Lists	6

CA-285584 – SB 311 Phase 2 - SSP only MSP Discontinuances

1 OVERVIEW

The purpose of this SCR is to prevent granting QMB (Qualified Medicare Beneficiary)/SLMB (Specified Low-Income Medicare Beneficiary)/QI-1 (Qualifying Individual) eligibility to individuals receiving SSP (State Supplementary Payment) only.

1.1 Current Design

With CA-259984 implemented on 12.05.2024, effective January 01, 2025, Medi-Cal EDBC rules were updated to no longer grant MSP eligibility to a qualified QMB/SLMB individual that has a high-dated OPA (Other Program Assistance) record with the "Type of Assistance" as 'SSI Only' or 'SSI/SSP' as of January 01, 2025, or later.

The "Type of Assistance" as 'SSP Only' was not included in the criteria to identify impacted population.

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>

1.2 Requests

1. Prevent granting MSP Eligibility to qualified MSP individuals with SSP only effective September 01, 2025.
2. Initiate a one-time process to run Batch EDBC for identified individuals with SSP only OPA record to discontinue MSP Individuals effective September 01, 2025.
3. Create a Journal for identified population from the one-time batch.
4. Provide a one-time county list for County Eligibility Workers to follow-up on any MSP individuals who may remain active after the one-time transition batch processing is complete.
5. Suppress any NOAs generated from the one-time batch.

1.3 Overview of Recommendations

1. Update Medi-Cal EDBC rules to deny MSP eligibility to identified QMB/SLMB/QI individuals with SSP only effective September 01, 2025.
2. Create a one-time process to run Batch EDBC for identified MSP individuals with SSP only record to discontinue effective September 01, 2025.

3. Add a Batch EDBC Sweep Code to display the Journal Description reason: "Discontinued SSP only MSP individual".
4. Generate a one-time county list to aid the counties to discontinue any Active MSP individuals with SSP only after Batch EDBC completes.
5. Create a Database Change Request (DCR) to reject all MC NOAs that generated from the one-time batch.

1.4 Assumptions

1. Per DHCS confirmation, currently, in policy, there is no Notice of Action (NOA) stating that an individual is being discontinued from MSP due to receipt of SSI/SSP.
2. DHCS will be handling the issuance of Approval NOAs for SSI/SSP members enrolled into the QMB program by the state as part of Phase I, starting October 01, 2024, as outlined in MEDIL [24-17](#). This notice will be sent to all individuals upon their SSI QMB approval.
3. No MEDS changes will be required.
4. CA-209344: Apply SSP Only OPA for Specific Programs, will be implemented in future release.

2 RECOMMENDATIONS

2.1 Medi-Cal Eligibility Rules Updates

2.1.1 Overview

Effective September 01, 2025, CalSAWS should deny eligibility to an SSP only individual that applies for QMB/SLMB/QI-1.

2.1.2 Description of Changes

1. Effective September 01, 2025, update the Medi-Cal EDBC rules to no longer grant MSP eligibility to a qualified QMB/SLMB/QI-1 (80/8C/8D) individual that has an OPA record with "Type of Assistance" as 'SSP Only' effective for at least a day in a benefit month as of September 01, 2025, or later.
 - a. Save the SSP only individual on the MSP Budget(s) as below:
 - i. **Role:** FRI
 - ii. **Role Reason:** On Aid Another Case

The screenshot displays the 'Medi-Cal Summary' interface. At the top, a note states: 'Note: Overridden rows are in bold.' Below this, there are two main sections: 'Eligible Budgets for MEDS' and 'Failed and Overridden Budgets'. The 'Eligible Budgets' section is currently empty, showing 'No Data Found'. The 'Failed and Overridden Budgets' section contains a table with the following data:

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
MSP - MC	Fail	\$0	0.00			Kiki, Miu 28F	FRI	On Aid Another Case

Below the table, there is a button labeled 'Override Medi-Cal Summary'. At the bottom right of the interface, there are two buttons: 'Accept' and 'Cancel'.

Figure 2.1.2 Medi-Cal EDBC Summary Page

2.1.3 Programs Impacted

Medi-Cal

2.1.4 Performance Impacts

N/A

2.2 One-Time Batch

2.2.1 Overview

Initiate a one-time process to run Batch EDBC for identified MSP individuals who are receiving SSP only in Medi-Cal programs including those with the Yellow Banner, to discontinue MSP eligibility effective September 01, 2025. Create a Journal entry for the identified population processed successfully in the one-time process.

2.2.2 Description of Change

1. Batch EDBC

Initiate a one-time process to discontinue identified MSP individuals effective September 01, 2025

- a. Identify individuals that meet all the following conditions for one-time Batch EDBC processing:
 - i. The individual is on aid code 80/8C/8D
 - ii. Has an effective OPA record with "Type of Assistance" as 'SSP Only' as of September 01, 2025, or later
- b. Run Batch EDBC for the September '2025 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 2.2.2.2.

2. Journal Entry

Add a new Batch EDBC Sweep Code (CT_942) for the identified population in recommendation 2.2.2.1.

Code Table	Description
Short Description	Discontinued SSP only MSP Individual
Long Description	Discontinued SSP only MSP Individual

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.2.2.1.

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for September 2025.

Long Description: Batch EDBC ran for September 2025.
Batch EDBC processed for the Medi-Cal program for the following reason: Discontinued SSP only MSP Individual

3. Batch Exception for Medi-Cal programs with Yellow Banner

Update the following EDBC Skip Reason 'EDBC has not been run since Conversion' (CT707_CN) to not skip the Medi-Cal program if one of the following Batch Eligibility Sweep Codes is applied in addition to the existing criteria in 2.2.2.1:

- a. 'Individual Discontinuance and RE Advanced' (CT_942_ID)
- b. 'Discontinue Medi-Cal Program for Non-Receipt or Income RD' (CT_942_MR)

2.2.3 Execution Frequency

One-Time

2.2.4 Key Scheduling Dependencies

One-time process will run on July 21, 2025, to insert records to be processed by the regularly scheduled Batch EDBC.

2.2.5 Counties Impacted

All Counties

2.2.6 Data Volume/Performance

Approximately 4000 individuals will be processed with this change.
No NOAs will be sent to Central Print because they will be Rejected with Recommendation 2.3.

2.3 Correspondence – DCR to Reject Batch Generated NOAs

2.3.1 Overview

Create a DCR to set the NOAs generated from this one-time batch with a NOA status of 'Rejected' to prevent any NOAs from being sent out via central-print jobs.

2.3.2 Description of Change

1. Create a DCR query to set all NOAs generated from the one-time batch with a NOA status of 'Rejected' (CT220_RJ).

CC Technical Note: A case that has undergone the one-time batch can be identified in the BATCH_ELIG_LOG.SYS_TRANSACT_CREATED_BY column with value '285584'.

2.4 Automated Regression Test

2.4.1 Overview

Create automated regression test scripts to verify that when Medi-Cal EDBC is run for a QMB (aid code 80) case in benefit month 09/2025 or later:

1. On a case with OPA "Type of Assistance" 'SSP Only', the MSP - MC test fails due to 'On Aid Another case'.
2. On a case with no OPA records, the MSP - MC test passes, and aid continues under aid code 80.

2.4.2 Description of Change

1. Create regression scripts to verify that MSP eligibility is granted under aid code 80 for MSP applicants who are QMB eligible with no OPA records.
 - a. Create regression scripts to verify that MSP eligibility is not granted for MSP applicants who are otherwise QMB eligible but have an OPA record with "Type of Assistance" as 'SSP Only'.

Developer Note: See deprecated 'MC - MSP Property Limit - Single' script for case construct details.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Policy	ACWDL 24-01	 ACWDL Medicare Part A Buy-in.pdf
2	Policy	MEDIL I 24-17	 MEDIL 24-17.pdf

4 OUTREACH

4.1 Lists

1. Generate a one-time County list for the County Eligibility Workers after Batch EDBC completes.

List Name: SSP Only MSP Individuals not processed

List Criteria: Generate a list of cases where the MSP individual with SSP only OPA record remains Active on aid code 80/8C/8D after the one-time Batch EDBC is processed (recommendation 2.2.2.1.a)

Standard Columns:

- Case Name
- Case Number

- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Person Name <First Name, Last Name>
- CIN
- Aid Code
<Column will have aid codes 80, 8C or 8D>
- DOB

Frequency: One-time

County Action: Workers should run an online Eligibility Determination and Benefit Calculation (EDBC) to ensure the SSP QMB/SLMB/QI-1 individual is correctly discontinued. Once the worker has confirmed the EDBC results to be correct, authorize the EDBC. If the online EDBC does not discontinue the SSP QMB/SLMB/QI-1 individual, workers should evaluate what action(s) are required, i.e. lift soft pause, request a negative action via a MAGI request. Also, if a notice is generated, the worker will need to reject that notice manually. Individuals on the posted list should be discontinued effective 09/01/2025.

2. Generate one-time report to provide statistics by county.

List Name: SSP only MSP Discontinuance Statistics

The list will display the below columns:

- County
- Total Targeted Population
- Individuals Discontinued
- Cases Discontinued

List Criteria:

- **Total Targeted Population:** includes all individuals that meet below criteria –
 - The individual is on aid code 80/8C/8D
 - Has an effective OPA record with "Type of Assistance" as 'SSP Only' as of September 01, 2025, or later.
- **Individuals Discontinued:** Individuals discontinued from MSP (on aid code 80/8C/8D) because of one-time process (2.2.2.1)
- **Cases Discontinued:** Case discontinued has all individuals discontinued from MSP because of one-time process

Frequency: One-time

County Action: N/A

The lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-285584