



California Statewide Automated Welfare System

A large graphic on the right side of the page consisting of several concentric circles in various shades of blue and teal. The word "Design" is centered within these circles in a white, sans-serif font.

# Design

**CA-216284**

CalHEERS eHIT: MAGI Medi-Cal Budget Periods

## DOCUMENT APPROVAL HISTORY

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DATE	VERSION	REVISION DESCRIPTION	AUTHOR
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05/16/2025	0.5	Updated eHIT section for saving totalRPAISCAIAmount, Income Proof Required, and Beneficiary ind.	Renee Gustafson
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05/21/2025	0.7	Added Income Detail page updates for e-Data and removed e-data rec from eHIT section	Renee Gustafson
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05/28/2025	0.9	Final Draft sent to Committee	Renee Gustafson
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# CA-216284 – CalHEERS eHIT: MAGI Medi-Cal Income Budget Periods

## 1 OVERVIEW

ACWDL 21-04 provides guidance to counties on Modified Adjusted Gross Income (MAGI) Medi-Cal income calculations and introduces the utilization of multiple budget periods for counting income. The Center for Medicare and Medicaid Services (CMS) allows states to select three different budget periods on which to base MAGI Medi-Cal eligibility. California elected to use all three budget period methodologies. The methodologies are as follows:

- Current Monthly Income (CMI)
- Reasonably Projected Annual Income (RPAI)
- System Calculated Annual Income (SCAI)

This change is in conjunction with CalHEERS CR 151332. CalHEERS will update their Business Rules Engine (BRE) to utilize the three MAGI Budget Periods.

### 1.1 Current Design

Currently in CalSAWS, users can enter Income and Expense information with begin dates up to 5 months into the future from the system date. Due to this system limitation, when an individual reports they have fluctuating income and provides future anticipated income more than 5 months into the future, users manually calculate the projected annual income and enter it in the Income Detail page as 'Annual' income or in the Tax Household Detail page as Projected Annual Income for MAGI and Covered California Exchange determinations.

CalSAWS sends Income Detail records as income data to CalHEERS in an EDR if the income record is effective 01/01/2014 or later based on an eHIT income type mapping. One such mapping is for IHSS 'Caregiver Wages – Other'. If the 'MAGI Medi-Cal: Lives with IHSS Recipient' is not checked on the Income detail page, then CalSAWS sends the income as 'Salary/Wages' ('Work' in eHIT). If the 'MAGI Medi-Cal: Lives with IHSS Recipient' is checked, then CalSAWS does not send the income in the EDR so CalHEERS will not use it in the MAGI budget.

CalSAWS sends Expense Detail records as deductions to CalHEERS in an EDR if the expense record is effective 01/01/2014 or later based on an eHIT deduction type mapping. The mapping includes all the Expense types in the 'MAGI Expense' category and 'Spousal Support – Court Ordered' in both the 'MAGI Expense' and the 'Child/Spousal Support - Court Ordered' categories.

CalSAWS sends the Projected Annual Income (PAI) value from the Tax Household Detail page to CalHEERS in an EDR as PAI.

**Tax Household Detail**

\*- Indicates required fields

Save

Cancel

**Name:**

Jackson, Jennifer 24F

**Primary Tax Filer: \***

Yes

**Filing Year: \***

2024

**Is this person expected to be required to file taxes for the current year? \***

Yes

**Is this person planning to file taxes for the current year? \***

Yes

**Expected Filing Status: \***

Married Filing Jointly

**Married Filing Jointly Exception: \***

No

**Tax Filing Status Association \***

Jackson, Jim 24M

**Caretaker Relative:**

**Is this person expected to be claimed as a Dependent by a non-custodial parent?**

No

**Who claims this person as a Dependent this year?**

-Select-

**Projected Annual Income**

**Projected Annual Income Amount:**

**Is the Projected Annual Income amount correct?**

CalHEERS uses the income and deduction data to determine a system calculated CMI and PAI, and treats the PAI provided in the EDR as an 'overridden' PAI in the MAGI budget and the Subsidy income calculations.

CalSAWS displays the MAGI Budget information provided in the DER on the 'MAGI Budget Detail' page.

MAGI Budget Detail

Close

Name:  
Jennifer Jacksen

MAGI Medi-Cal Monthly Income Budget

Current Monthly Income:

\$2,576.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Name	Category	Business	Type	Amount
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00
Jennifer Jacksen	Other Income	SDI	Social Security Disability	\$14.00
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00

Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Current Monthly Income After Deductions:

\$2,451.00

Projected Annual Income (Monthly Amount):

\$2,089.00

Total Countable Income:

\$2,089.00

Name	Type	Amount
Jim Jacksen	Current Monthly Income	\$1,362.00
Jim Jacksen	Projected Annual Income (Monthly Amount)	\$1,000.00
Jennifer Jacksen	Current Monthly Income	\$1,089.00

Non Countable Income:

\$12.00

Name	Category	Business	Type	Amount
Baby Jacksen	Employment Income		Salary, Wages	\$12.00

Non Countable Deductions:

\$250.00

Name	Type	Amount
Baby Jacksen	Health Savings Account	\$250.00

Total Household Members:

3

Name
Jim Jacksen
Jennifer Jacksen
Baby Jacksen

Federal Poverty Level:

\$2,221.00

FPL% for Individual:

94.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer Household Composition for MAGI Medi-Cal:

No

Meets 435.603(i) Exception to Use APTC Income/Deduction Calculations for MAGI Medi-Cal Determination:

No

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to Dependent Child Under Age 19 without Minimum Essential Coverage:

No

Person Disability Indicator:

No

Close

CalSAWS collects a Medi-Cal Reasonable Explanation that includes both Verification Types of Current Monthly Income (CMI) and Projected Annual Income (PAI).

### Medi-Cal Reasonable Explanation Detail

\* - Indicates required fields

**Name: \***

Jackson, Jennifer 24F

**Type: \***

Income

**Verification Type: \***

☐ Current Monthly Income (CMI)
 ☒ Projected Annual Income (PAI)

**Reason: \***

Change in Marital Status

**Begin Month: \***

05/2025

**End Month:**

Save and Return

Cancel

Save and Return

Cancel

CalSAWS sends the Reasonable Explanation Verification Type in the EDR based on the type(s) selected in the Medi-Cal Reasonable Explanation Detail page and displays Medi-Cal Reasonable Explanation 'Verification Type' sent in an EDR and received in a DER on the MAGI Person Detail page.

Income						
Projected Annual Income						
Projected Annual Amount: \$100.00						
Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
No Data Found						
Medi-Cal Reasonable Explanation						
Reason	Status	Verification Type	Reasonable Explanation			
Change in Marital Status	Reasonable Explanation	Projected Annual Income (PAI)				

CalSAWS sends the MAGI Current Monthly Income Administrative Verification based on the verification status of actual income records or based on the MAGI Verification of No Income. CalSAWS displays the Administrative or e-Verification of MAGI Current Monthly Income on the MAGI Person Detail page as follows:

Verification
Verification Type
SSN
SSN Waiver
Applied for SSN
US Citizenship
Immigration Status
Lawful Presence
Qualified Non-Citizen
Five Year Bar Exempt/Met
PRUCOL
PRUCOL - INS Ack
MAGI Current Monthly Income
MAGI Projected Annual Income
Federal Subsidy Income
State Subsidy Income

CalHEERS sends plain language Verification Interpretations to CalSAWS for some verifications. CalSAWS displays this as 'eHIT Response' hover over on the Verif Status on the MAGI Person Detail page. The eHIT logic references the CalHEERS Verification Response Description code table (CT\_10764) and if the Interpretation text matches exactly to the text in the code table, only the code is saved to the Verification record in CalSAWS database to save space. If the Interpretation text doesn't match exactly to a row in the code table, the full text is saved to the CalSAWS database in the Verification record.

Verification					
E-Verified		Admin Verified			
Verification Type	Verified	Attested Value	Verif Status	Verif Source	Verif Cache Date
SSN	Yes	123456789	E-Verified	FDSH:SSA	01/20/2026
SSN Waiver					
Applied for SSN					
US Citizenship					
Immigration Status					
Lawful Presence					
Qualified Non-Citizen					
Five Year Bar Exempt/Met					
PRUCOL					
PRUCOL - INS Ack					
MAGI Current Monthly Income					
MAGI Projected Annual Income	No		Not V		
Federal Subsidy Income	No	1500.00	Not Verified		
State Subsidy Income	No	1500.00	Not Verified		
MEC MEDS	No	No	E-Verified	MEDS	01/20/2026

**eHit Response**  
The individual could not be verified



## 1.2 Requests

With CalHEERS Change Request 151332, CalHEERS will introduce two new MAGI Budget Calculation methods:

- System Calculated Annual Income (SCAI): The income and deductions for the entire calendar year.
- Reasonably Projected Annual Income (RPAI): A calculation of 12 rolling months of income and deductions based on the EDR benefit month. CalHEERS may also freeze the RPAI and use the frozen RPAI in a future MAGI Determination.

To reduce the need for users to calculate the annual income for fluctuating income, update CalSAWS to allow users to enter income and expense information up to 12 months into the future.

CalHEERS will use the income and deduction information sent in the EDR to determine SCAI, RPAI and CMI MAGI budget calculations. CalHEERS will send the MAGI budget calculation method used in the budget and provide SCAI and RPAI calculations. CalHEERS will also send plain language Verification Interpretations for Income Verifications when SCAI or RPAI is used. Update the MAGI Budget Detail page to display the new budgeting information received in a DER. Update the MAGI Person Detail page to display the new eHIT responses received for Income based on SCAI or RPAI.

Per DHCS, an individual who is MAGI Eligible based on SCAI budgeting methodology must be reevaluated in January of the following year. Add batch jobs to CalSAWS to automate the MAGI reevaluation for any individual eligible via SCAI.

CalHEERS will no longer use the PAI amount collected in the 'Tax Household Page' as a calculation methodology for MAGI but will continue to use it as 'Overridden PAI' for Covered California Exchange programs. Update the historical MAGI budgets where PAI method was used to indicate its MAGI PAI historical. Update the Tax Household Page label to indicate the PAI is for Exchange only. Update the MAGI Person Detail page to indicate the PAI is for Exchange only in both the income section and verification section. Update the MAGI Person Detail page to indicate the Verification of 'MAGI Current Monthly Income' is for 'MAGI Income'.

The Reasonable Explanation (REX) Verification Type of 'Projected Annual Income (PAI)' no longer applies. CalHEERS will always use 'Current Monthly Income (CMI)' for REX and CalHEERS will apply it to SCAI, RPAI or CMI MAGI budget calculations as appropriate. Remove the 'Verification Type' options on the Medi-Cal Reasonable Explanation page. Default eHIT to always send Verification Type 'CMI' and update the decode for historical Verification Types of PAI to display 'MAGI PAI (Historical)' if a user views an historical EDR or DER.

SCAI budgeting methodology is only permitted to be used for Medi-Cal beneficiaries and is not applicable for new applicants. A 'Beneficiary Indicator' will be added to eHIT to allow CalSAWS to inform CalHEERS when an individual was a beneficiary on cash-based Medi-Cal or Medi-Cal in the month prior to the first evaluation for MAGI so SCAI can be used, if applicable.

IHSS income is countable in a MAGI budget only if the person does not live with the recipient, but it is countable for exchange programs regardless if they live with the recipient or not. A new eHIT Income Type for 'IHSS' will be added along with an indicator to specify if they live with the recipient. Update the eHIT income mappings for IHSS 'Caregiver Wages – Other' to send and receive as 'IHSS' Income and set the indicator to "Yes" if the checkbox is checked on the income page.

CalHEERS added more static text that will be sent to CalSAWS in eHIT verification Interpretations. Update the CalHEERS Verification Response Description code table with the new text values

### 1.3 Overview of Recommendations

1. The Income Amount Detail page allows users to add or edit an income amount. This SCR will update the page to allow users to enter an income amount that is up to 12 months in the future from the system date.
2. Update the Income Detail page to display e-Data for 'Lives with IHSS Recipient' received in an unsolicited DER.
3. The Expense Amount Detail page allows users to access, edit and create expense amount details. This SCR will update the page to allow users to enter an expense amount that begins and/or ends up to 12 months into the future from the system date.
4. The Expense Contributors Detail page allows users to add, edit or view expense contributors for a specified time period. This SCR will update the page to allow users to enter an expense contributor that begins and/or ends up to 12 months into the future from the system date.
5. Update the MAGI Budget Detail page design layout and add additional elements to display the new MAGI Budget Period Income period information received from CalHEERS.
6. Update the MAGI Person Detail page to display the newly added and updated elements for the EDR and DER.
7. Update the 'Tax Household Detail' page 'Projected Annual Income' section label to also indicate it is for Exchange only.
8. Update the 'Medi-Cal Reasonable Explanation Detail' page to no longer display the 'Verification Type'.
9. Create a new 'SCAI Re-evaluation' Batch MAGI Sweep job to identify individuals who are eligible on MAGI Medi-Cal due to the SCAI MAGI Medi-Cal Budget Methodology for reevaluation in January of the following year.
10. Create a new 'SCAI Re-evaluation Batch EDBC Sweep' job to process EDBC for programs where the 'SCAI Re-evaluation' DER returned.
11. Add new batch EDBC skip reasons to skip Medi-Cal programs from processing EDBC when the DER from 'SCAI Re-evaluation' has income verification pending, or an Active Medi-Cal Member is losing MAGI coverage, or any Member is on aid code 7J without Full Medi-Cal Hierarchy set to Yes.
12. Update eHIT logic to receive and display additional MAGI Budget information from CalHEERS. Update eHIT logic to communicate IHSS income type and Lives with Recipient Indicator. Update eHIT outbound logic to communicate Beneficiary Indicator when an individual is transitioning from cash-based or Non-MAGI Medi-Cal to MAGI, and they are evaluated by CalHEERS for the first

time. Update eHIT to default 'CMI' Verification Type for Reasonable Explanation.

13. Run a one-time data change to convert the existing values for 'PAI/CMI used' in the historical MAGI Budget to the new field for 'Income Calculation Methodology Used'.

## 1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of the design.
2. There are no impacts to MEDS or other EDBC programs income and expense calculations as a result of extending the date limit from 5 months to 12 months on the Income and Expense pages. The other EDBC rules will still calculate income and expenses accordingly and pro-rate if appropriate.
3. eHIT Schema is updated to version 23 with SCR CA-283790 in the same release.
4. Some minor cosmetic changes are out of scope for this SCR and will be updated with future SCR CA-291047. These are pointed out in the eHIT section.

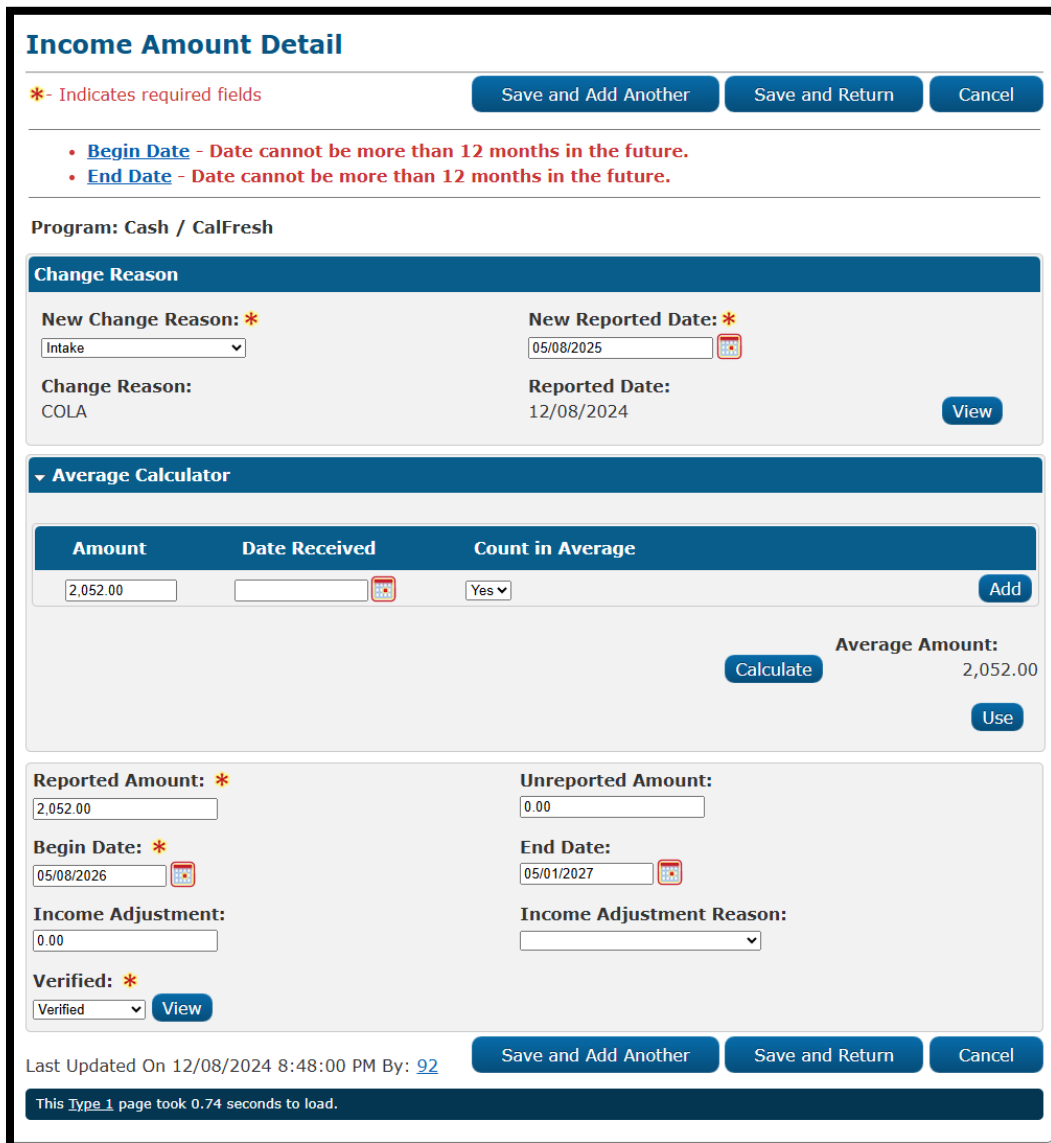
## 2 RECOMMENDATIONS

### 2.1 Income Amount Detail

#### 2.1.1 Overview

The Income Amount Detail page allows users to add or edit an income amount. This SCR will update the page to allow users to enter an income amount that is up to 12 months in the future from the system date.

#### 2.1.2 Income Amount Detail Page Mockup



**Income Amount Detail**

\* - Indicates required fields

Save and Add Another Save and Return Cancel

- **Begin Date** - Date cannot be more than 12 months in the future.
- **End Date** - Date cannot be more than 12 months in the future.

Program: Cash / CalFresh

**Change Reason**

New Change Reason: \*  
Intake

New Reported Date: \*  
05/08/2025

Change Reason:  
COLA

Reported Date:  
12/08/2024

View

**▼ Average Calculator**

Amount	Date Received	Count in Average
2,052.00		Yes

Add

Calculate Average Amount: 2,052.00

Use

**Reported Amount: \***  
2,052.00

**Unreported Amount:**  
0.00

**Begin Date: \***  
05/08/2026

**End Date:**  
05/01/2027

**Income Adjustment:**  
0.00

**Income Adjustment Reason:**

**Verified: \***  
Verified

View

Last Updated On 12/08/2024 8:48:00 PM By: 92

Save and Add Another Save and Return Cancel

This Type\_1 page took 0.74 seconds to load.

Figure 2.1.1 – Income Amount Detail Page (with updated validation messages)

### Income Amount Detail

\*- Indicates required fields

EditClose

Program: Cash / CalFresh

Change Reason

Change Reason: Intake

Reported Date: 05/01/2025

View

Average Calculator

Amount	Date Received	Count in Average
2,052.00		Yes

Reported Amount: \*  
2,052.00

Begin Date: \*  
01/01/2026

Income Adjustment:  
0.00

Verified: \*  
Verified View

Unreported Amount:  
0.00

End Date:  
03/01/2026

Income Adjustment Reason:

Figure 2.1.2 – Income Amount Detail Page

### 2.1.3 Description of Changes

1. Update the following validation messages and their corresponding logic from the Income Amount Detail page:
  - a. Update the validation message: “Begin Date – Date cannot be more than 5 months in the future.” to “Begin Date – Date cannot be more than 12 months in the future.”
    - i. Update the logic to display the validation message when the user clicks on the ‘Save and Add Another’ or ‘Save and Return’ button and the date entered on the Begin Date field is 12 months from the system date.
  - b. Update the validation message: “End Date – Date cannot be more than 5 months in the future.” to “End Date – Date cannot be more than 12 months in the future.”
    - i. Update the logic to display the validation message when the user clicks on the ‘Save and Add Another’ or ‘Save and Return’ button and the date entered on the End Date field is 12 months from the system date.
  - c. This will apply for all programs: Medi-Cal, Cash/CalFresh, Actuals (TMC/Pickle)

2. Update the date picker on both the Begin Date and End Date field to allow users to select a date that is 12 months in the future from the system date, but not more than 12 months in the future.

**Note:** Currently, the date picker will only allow users to select a date that is up to 5 months in the future from the system date.

#### 2.1.4 Page Location

---

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

#### 2.1.5 Security Updates

---

N/A

#### 2.1.6 Page Mapping

---

N/A

#### 2.1.7 Accessibility

---

Accessibility was assessed for the Income Amount Detail page and no changes are needed on the page.

#### 2.1.8 Page Usage/Data Volume Impacts

---

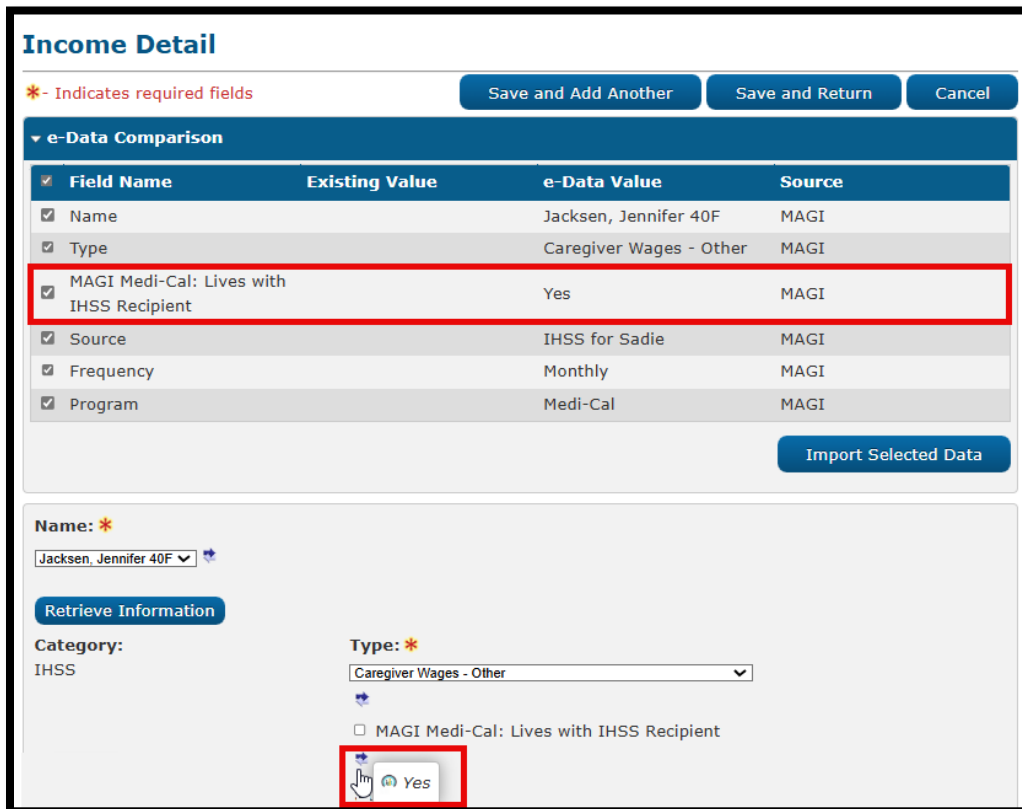
N/A

## 2.2 Income Detail

### 2.2.1 Overview

Update the Income Detail page to display e-Data for 'Lives with IHSS Recipient' received in an unsolicited DER.

### 2.2.2 Income Detail Page Mockup



The mockup shows the 'Income Detail' page. At the top, there's a header 'Income Detail' and three buttons: 'Save and Add Another', 'Save and Return', and 'Cancel'. Below this is a section 'e-Data Comparison' with a table. The table has four columns: 'Field Name', 'Existing Value', 'e-Data Value', and 'Source'. The rows are: 'Name' (Jacksen, Jennifer 40F), 'Type' (Caregiver Wages - Other), 'MAGI Medi-Cal: Lives with IHSS Recipient' (Yes), 'Source' (IHSS for Sadie), 'Frequency' (Monthly), and 'Program' (Medi-Cal). The row for 'MAGI Medi-Cal: Lives with IHSS Recipient' is highlighted with a red border. Below the table is an 'Import Selected Data' button. Underneath the table is a form section. It starts with 'Name: \*' and a dropdown menu showing 'Jacksen, Jennifer 40F'. Below that is a 'Retrieve Information' button. Then 'Category: IHSS'. To the right is 'Type: \*' with a dropdown menu showing 'Caregiver Wages - Other'. Below that is a checkbox for 'MAGI Medi-Cal: Lives with IHSS Recipient'. Below the checkbox is a red-bordered box containing a 'Yes' button.

Field Name	Existing Value	e-Data Value	Source
Name	Jacksen, Jennifer 40F		MAGI
Type	Caregiver Wages - Other		MAGI
MAGI Medi-Cal: Lives with IHSS Recipient		Yes	MAGI
Source	IHSS for Sadie		MAGI
Frequency	Monthly		MAGI
Program	Medi-Cal		MAGI

Import Selected Data

Name: \*  
Jacksen, Jennifer 40F

Retrieve Information

Category: IHSS

Type: \*  
Caregiver Wages - Other

☐ MAGI Medi-Cal: Lives with IHSS Recipient

Yes

Figure 2.2.2.1 – Income Detail Page Mockup displaying e-Data for 'MAGI Medi-Cal: Lives with IHSS Recipient'

### 2.2.3 Description of Changes

---

1. Update Income Detail page to display the e-Data received for 'MAGI Medi-Cal: Lives with IHSS Recipient' in an unsolicited DER when the Income Type is 'Caregiver Wages – Other' as follows:
  - a. Add the option in the e-Data Comparison table as shown in Figure 2.2.2.1.
  - b. Add an e-Data arrow option below the 'MAGI Medi-Cal: Lives with IHSS Recipient' checkbox.
  - c. When user either clicks on 'Import Selected Data' button with 'MAGI Medi-Cal: Lives with IHSS Recipient' field name selected in e-Data Comparison table, or clicks on the e-Data arrow to accept the e-Data value next to the field itself, then do the following:
    - i. If the Value is 'Yes', check the 'MAGI Medi-Cal: Lives with IHSS Recipient' checkbox.
    - ii. If the value is No or blank, remove the 'MAGI Medi-Cal: Lives with IHSS Recipient' check if it is already checked; otherwise, do nothing so the checkbox remains unchecked.

**Note:** The 'MAGI Medi-Cal: Lives with IHSS Recipient' checkbox only displays on the Income Detail page when the Income Type is 'Caregiver Wages – Other'. This conditional display functionality is not changing.

### 2.2.4 Page Location

---

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

### 2.2.5 Security Updates

---

N/A

### 2.2.6 Page Mapping

---

N/A

### 2.2.7 Accessibility

---

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

### 2.2.8 Page Usage/Data Volume Impacts

---

N/A



## 2.3 Expense Amount Detail

### 2.3.1 Overview

The Expense Amount Detail page allows users to access, edit and create expense amount details. This SCR will update the page to allow users to enter an expense amount that begins and/or ends up to 12 months into the future from the system date.

### 2.3.2 Expense Amount Detail Mockup

The mockup displays the 'Expense Amount Detail' page with the following elements:

- Header:** 'Expense Amount Detail' title and 'Save and Return' / 'Cancel' buttons.
- Legend:** '\*- Indicates required fields'.
- Validation Messages:**
  - **Begin Date** - Date cannot be more than 12 months in the future.
  - **End Date** - Date cannot be more than 12 months in the future.
- Change Reason Section:**
  - New Change Reason:** \* (Dropdown menu with 'Intake' selected)
  - New Reported Date:** \* (Date field with '05/01/2025' and a calendar icon)
  - Change Reason:** (Text field)
  - Reported Date:** (Text field)
- Amount Section:**
  - Amount:** \* (Text field with '100.00')
  - Amount Paid by Others:** (Text field with '0.00')
  - Name of Others who Paid:** (Text field)
- Dates Section:**
  - Begin Date:** \* (Date field with '05/08/2026' and a calendar icon)
  - End Date:** (Date field with '10/08/2026' and a calendar icon)
- Verified Section:**
  - Verified:** \* (Dropdown menu with 'Pending' selected and a 'View' button)
- Footer:** 'Save and Return' / 'Cancel' buttons and a status bar: 'This Type 1 page took 2.35 seconds to load.'

Figure 2.3.1 – Expense Amount Detail Page (with updated validation messages)

## Expense Amount Detail

\*- Indicates required fields

EditClose

Change Reason

Change Reason:

Participant Provided - Verbal

Reported Date:

05/08/2025

View

Amount: \*

100.00

Amount Paid by Others:

0.00

Name of Others who Paid:

Begin Date: \*

01/01/2026

End Date:

03/01/2026

Verified: \*

Pending

View

EditClose

Last Updated On 05/08/2025 4:15:59 PM By: [1409355](#)

This Type 1 page took 0.40 seconds to load.

**Figure 2.3.2 – Expense Amount Detail Page**

### 2.3.3 Description of Changes

- Update the following validation messages and their corresponding logic from the Expense Amount Detail page:
  - Update the validation message: "Begin Date – Date cannot be more than 5 months in the future." to "Begin Date – Date cannot be more than 12 months in the future."
    - Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the Begin Date field is 12 months from the system date.
  - Update the validation message: "End Date – Date cannot be more than 5 months in the future." to "End Date – Date cannot be more than 12 months in the future."
    - Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the End Date field is 12 months from the system date.
- Update the date picker on both the Begin Date and End Date field to allow users to select a date that is 12 months in the future from the system date, but not more than 12 months in the future.

**Note:** Currently, the date picker will only allow users to select a date that is up to 5 months in the future from the system date.

#### 2.3.4 Page Location

---

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

#### 2.3.5 Security Updates

---

N/A

#### 2.3.6 Page Mapping

---

N/A

#### 2.3.7 Accessibility

---

Accessibility was assessed for the Income Amount Detail page and no changes are needed on the page.

#### 2.3.8 Page Usage/Data Volume Impacts

---

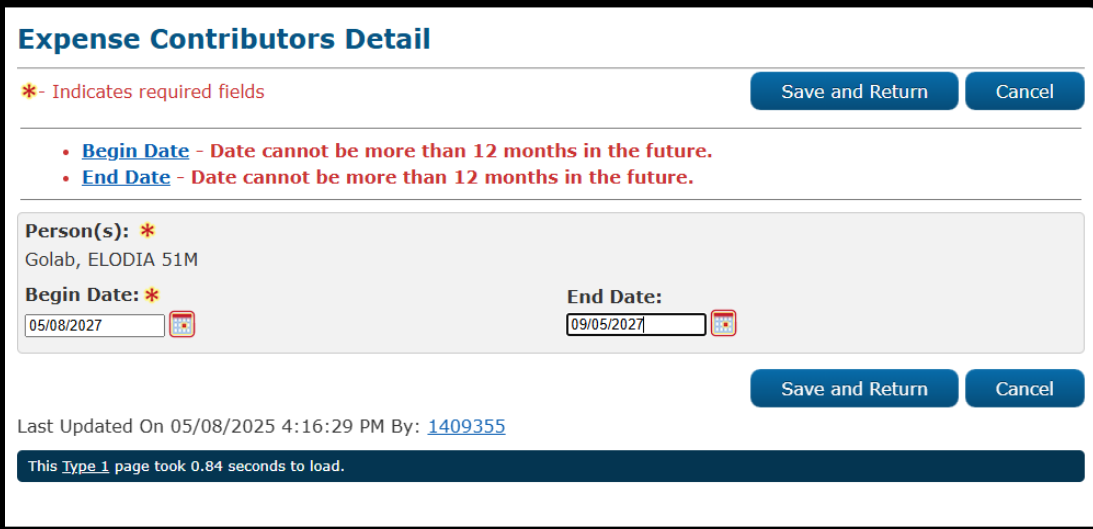
N/A

## 2.4 Expense Contributors Detail

### 2.4.1 Overview

The Expense Contributors Detail page allows users to add, edit or view expense contributors for a specified time period. This SCR will update the page to allow users to enter an expense contributor that begins and/or ends up to 12 months into the future from the system date.

### 2.4.2 Expense Contributors Detail Mockup



**Expense Contributors Detail**

\*- Indicates required fields

Save and Return Cancel

- **Begin Date** - Date cannot be more than 12 months in the future.
- **End Date** - Date cannot be more than 12 months in the future.

Person(s): \*  
Golab, ELODIA 51M

Begin Date: \* 05/08/2027

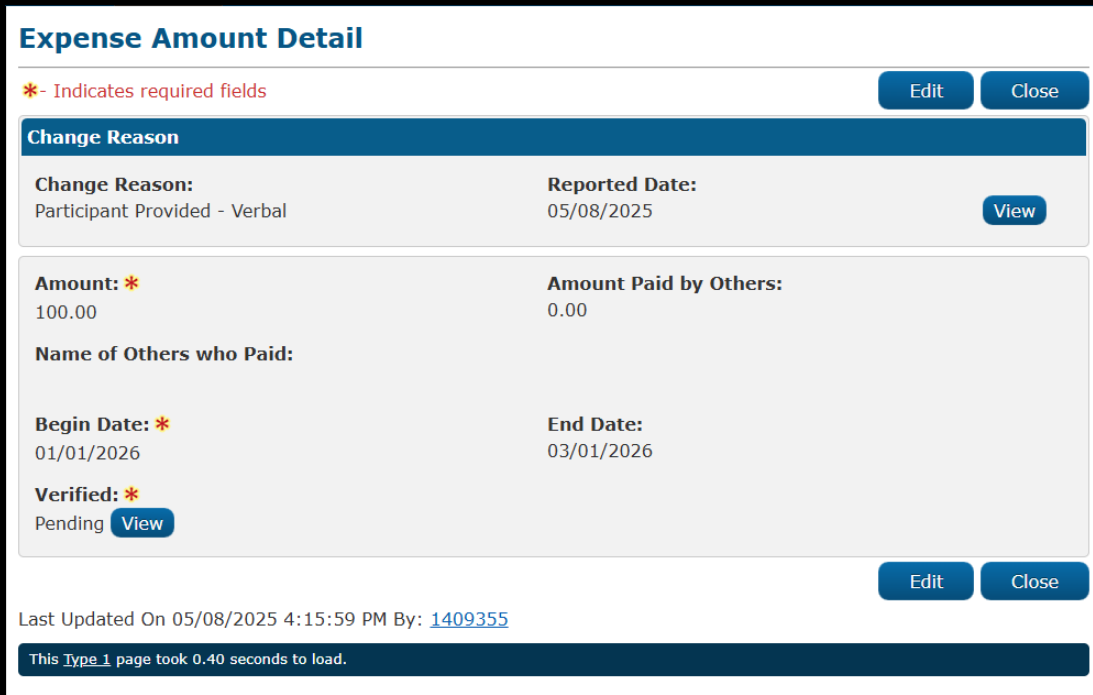
End Date: 09/05/2027

Save and Return Cancel

Last Updated On 05/08/2025 4:16:29 PM By: [1409355](#)

This Type 1 page took 0.84 seconds to load.

Figure 2.4.2.1 – Expense Contributors Detail Page (with updated validation messages)



**Expense Amount Detail**

\*- Indicates required fields

Edit Close

**Change Reason**

Change Reason: Participant Provided - Verbal

Reported Date: 05/08/2025

View

Amount: \* 100.00

Amount Paid by Others: 0.00

Name of Others who Paid:

Begin Date: \* 01/01/2026

End Date: 03/01/2026

Verified: \* Pending View

Edit Close

Last Updated On 05/08/2025 4:15:59 PM By: [1409355](#)

This Type 1 page took 0.40 seconds to load.

Figure 2.4.2.2 – Expense Contributors Detail Page

### 2.4.3 Description of Changes

---

1. Update the following validation messages and their corresponding logic from the Expense Contributors Detail page:
  - a. Update the validation message: "Begin Date – Date cannot be more than 5 months in the future." to "Begin Date – Date cannot be more than 12 months in the future."
    - i. Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the Begin Date field is 12 months from the system date.
  - b. Update the validation message: "End Date – Date cannot be more than 5 months in the future." to "End Date – Date cannot be more than 12 months in the future."
    - i. Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the End Date field is 12 months from the system date.
2. Update the date picker on both the Begin Date and End Date field to allow users to select a date that is 12 months in the future from the system date, but not more than 12 months in the future.

**Note:** Currently, the date picker only allows users to select a date that is up to 5 months in the future from the system date.

### 2.4.4 Page Location

---

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

### 2.4.5 Security Updates

---

N/A

### 2.4.6 Page Mapping

---

N/A

### 2.4.7 Accessibility

---

Accessibility was assessed for the Income Amount Detail page and no changes are needed on the page.

### 2.4.8 Page Usage/Data Volume Impacts

---

N/A

## 2.5 MAGI Budget Detail

### 2.5.1 Overview

Update the MAGI Budget Detail page design layout and add additional elements to display the new MAGI Budget Period Income period information received from CalHEERS.

### 2.5.2 MAGI Budget Detail Page Mockup

MAGI Budget Detail

Close

Name:  
Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income: \$2,200.00

Total Self Employment Monthly Income: \$362.00

Total Other Monthly Income: \$14.00

Total Current Monthly Income: \$2,576.00

Total Non-Countable Income: \$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions: \$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions: \$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions: \$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount: \$2,589.00

Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

Total Monthly Amount: \$2,875.00

Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used: CMI

Total Household Members: 3

Total Countable Income: \$2,451.00

Federal Poverty Level: \$2,152.00

FPL% for Individual: 113.00%

MAGI Medi-Cal Eligible: Yes

Medi-Cal Access Program (MCAP) Eligible: No

County Children's Health Initiative Program (CCHIP) Eligible: No

Unmarried Pregnant Woman Under 21 Income Disregard Applies: No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer: No

Household Composition for MAGI Medi-Cal: No

Meets 435.603(i) Exception to Use APTC Income/Deduction: No

Calculations for MAGI Medi-Cal Determination: No

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to Dependent Child Under Age 19 without Minimum Essential Coverage: No

Person Disability Indicator: No

Figure 2.5.2.1 MAGI Budget Detail page with CMI Income Calculation Method Used

MAGI Budget Detail

Close

Name:

Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Total Current Monthly Income:

\$2,576.00

Total Non-Countable Income:

\$12.00

Name	Category	Business	Type	Amount
Baby Jackson	Employment Income		Salary, Wages	\$12.00

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$250.00

Name	Type	Amount
Baby Jackson	Health Savings Account	\$250.00

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

\$2,089.00

Total Annual Amount:

\$25,068.00

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

Total Monthly Amount:

\$2,875.00

Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used:

RPAI

Total Household Members:

3

Total Countable Income:

\$2,089.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

97.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer

No

Household Composition for MAGI Medi-Cal:

Meets 435.603(i) Exception to Use APTC Income/Deduction

No

Calculations for MAGI Medi-Cal Determination:

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to

No

Dependent Child Under Age 19 without Minimum Essential Coverage:

Person Disability Indicator:

No

Figure 2.5.2.2 MAGI Budget Detail page with RPAI Income Calculation Method Used

MAGI Budget Detail

Close

Name:

Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Total Current Monthly Income:

\$2,576.00

Total Non-Countable Income:

\$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

\$2,089.00

Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

2026

Total Monthly Amount:

\$1,875.00

Total Annual Amount:

\$22,500.00

MAGI Household Budget Used

Income Calculation Method Used:

SCAI

Total Household Members:

3

Total Countable Income:

\$1,875.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

87.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer

No

Household Composition for MAGI Medi-Cal:

Meets 435.603(i) Exception to Use APTC Income/Deduction

No

Calculations for MAGI Medi-Cal Determination:

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to

No

Dependent Child Under Age 19 without Minimum Essential Coverage:

Person Disability Indicator:

No

Figure 2.5.2.3 MAGI Budget Detail page with SCAI Income Calculation Method Used



MAGI Budget Detail

Close

Name:

Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Total Current Monthly Income:

\$2,576.00

Total Non-Countable Income:

\$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

Total Monthly Amount:

Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used:

MAGI PAI (Historical)

Total Household Members:

3

Total Countable Income:

\$2,043.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

94.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer

No

Household Composition for MAGI Medi-Cal:

No

Meets 435.603(i) Exception to Use APTC Income/Deduction

No

Calculations for MAGI Medi-Cal Determination:

No

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to

No

Dependent Child Under Age 19 without Minimum Essential Coverage:

No

Person Disability Indicator:

No

**Figure 2.5.2.4 – MAGI Budget Detail page with MAGI PAI (Historical) Income Calculation Method Used when viewing historical MAGI PAI budgets**

MAGI Budget Detail

Close

Name:

Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Total Current Monthly Income:

\$2,576.00

Total Non-Countable Income:

\$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

Total Monthly Amount:

Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used:

CMI

Total Household Members:

3

Total Countable Income:

\$2,451.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

113.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer Household Composition for MAGI Medi-Cal:

No

Meets 435.603(i) Exception to Use APTC Income/Deduction Calculations for MAGI Medi-Cal Determination:

No

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to Dependent Child Under Age 19 without Minimum Essential Coverage:

No

Person Disability Indicator:

No

Figure 2.5.2.5 – MAGI Budget Detail page with CMI Income Calculation Method Used when viewing historical CMI budgets

### 2.5.3 Description of Changes

---

1. Redesign the layout of the MAGI Budget Detail Page to display as specified below and referenced in the mockups in 2.5.2:
  - a. Rename the “MAGI Medi-Cal Monthly Income Budget” section label to “Current Monthly Income (CMI)”
  - b. Update the “Current Monthly Income (CMI)” (originally labeled as MAGI Medi-Cal Monthly Income Budget) section to display the following information in the below order:
    - i. First, create an invisible 3 column table within the section with left indent 5%. The following recommendations are within the first two columns; labels in the first column left justified and the amounts in the second column, right justified. Third column is blank. The Amount column for all values in this subsection should line up with each other:
      1. Display the “Total Employment Monthly Income:” information.
        - a. “Total Employment Monthly Income:” is not bolded.
      2. Display the “Total Self Employment Monthly Income:” information.
        - a. “Total Self Employment Monthly Income:” is not bolded.
      3. Display the “Total Other Monthly Income:” information.
        - a. “Total Other Monthly Income:” is not bolded.
      4. Display the “Total Current Monthly Income:” information.
        - a. Relabel “Current Monthly Income:” to “Total Current Monthly Income:”
        - b. “Total Current Monthly Income:” is bolded.
      5. Display the “Total Non-Countable Income:” information.
        - a. Relabel “Non Countable Income:” to “Total Non-Countable Income:”
        - b. “Total Non-Countable Income:” is not bolded.
      6. Display the Non-Countable Income table.
        - a. The table displays right below the “Total Non-Countable Income:” information.
      7. Display the “Total Allowable Deductions:” information.
        - a. Relabel “Allowable Deductions:” to “Total Allowable Deductions:”
        - b. “Total Allowable Deductions:” is bolded.
      8. Display the Allowable Deductions table
        - a. The table displays right below the “Total Allowable Deductions:” information.
      9. Display the “Total Non-Countable Deductions:” information.
        - a. Relabel “Non Countable Deductions:” to “Total Non-Countable Deductions:”
        - b. “Total Non-Countable Deductions:” is not bolded.

- ii. Outside the invisible table and in the next row, display "Total Current Monthly Income After Deductions:"
  1. "Total Current Monthly Income After Deductions:" is bolded. Left align the label and right align the amount. Left align the label with the labels in the below sections and right align the amount with amounts in the below sections.
- c. Remove the "Projected Annual Income (Monthly Amount)" row.
 

**Note:** This budget is no longer calculated by CalHEERS. For historical MAGI budgets where PAI was used, this amount displays in 'Total Countable Income' with Income Calculation Method Used as 'MAGI PAI (Historical)'.
- d. Move "Total Countable Income" row to the new 'MAGI Household Budget Used' section. See Recommendation 2.5.3.1.j.
- e. Remove the table that was below "Total Countable Income".
 

**Note:** MAGI Budgets now only have a single Income Calculation Method Used per budget, not per person.
- f. Remove the Total Household Members table
 

**Note:** CalHEERS does not always provide the list of all the Household Members in the DER who belong in the budget so the table can be misleading if the number of people in the table differs from the Household Size.
- g. Move the following information to its own section, located below the "MAGI Household Budget Used" section.
  - i. "Federal Poverty Level:"
  - ii. "FPL% for Individual:"
  - iii. "MAGI Medi-Cal Eligible:"
  - iv. "Medi-Cal Access program (MCAP) Eligible:"
  - v. "Unmarried Pregnant Woman Under 21 Income Disregard Applies:"
  - vi. "Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer Household Composition for MAGI Medi-Cal:"
  - vii. "Meets 435.603(i) Exception to Use APTC Income/Deduction Calculations for MAGI Medi-Cal Determination:"
  - viii. "Meets 435.119(c): Adults Ineligible to the New Adult Group Due to Dependent Child Under Age 19 without Minimum Essential Coverage:"
  - ix. "Person Disability Indicator:"

- h. Add a new section named, “Reasonably Projected Annual Income (RPAI) After Deductions”.
  - i. The new section is located below the “Current Monthly Income (CMI)” section.
  - ii. The “Reasonably Projected Annual Income (RPAI) After Deductions” section displays the following information:
    1. “Total Monthly Amount:”
      - a. “Total Monthly Amount:” is bolded.
      - b. The “Total Monthly Amount:” displays information as outlined on the Table 1 below.
    2. “Total Annual Amount:”
      - a. Total Annual Amount:” is not bolded.
      - b. The “Total Annual Amount:” displays information as outlined on the Table 1 below.
    3. Left align the labels in this section and align with the labels in the below sections. Right align the amount in this section and align with amounts in the below sections.

**Table 1: “Reasonably Projected Annual Income (RPAI) After Deductions”**

Field	Description
Total Monthly Amount	<p>Display the value provided by CalHEERS in ‘Total Reasonably Projected Monthly Income Amount’. This value is saved in CH_BUDGET_DETL.RPMI_AMT.</p> <p>Bold the field label and the amount.</p>
Total Annual Amount	<p>Display the value for Total RPAI Amount. This value is saved in CH_BUDGET_DETL.RPAI_AMT.</p> <p>This amount displays a value if the value was provided by CalHEERS; otherwise, it displays as blank.</p> <p>CalHEERS will not send an RPAI Total Annual Amount unless the Income Calculation Method Used is RPAI.</p>

- i. Add a new section named, "System Calculated Annual Income (SCAI) After Deductions".
  - i. The new section is located below the "Reasonably Projected Annual Income (RPAI) After Deductions" section.
  - ii. The "System Calculated Annual Income (SCAI) After Deductions" section displays the following information:
    1. "Calendar Year:"
      - a. "Calendar Year:" is not bolded.
      - b. "Calendar Year:" displays information as outlined on Table 2 below.
    2. "Total Monthly Amount:"
      - a. "Total Monthly Amount:" is bolded.
      - b. "Total Monthly Amount:" displays information as outlined on Table 2 below.
    3. "Total Annual Amount:"
      - a. "Total Annual Amount:" is not bolded.
      - b. "Total Annual Amount:" displays information as outlined on Table 2 below.
    4. Left align the labels in this section and align with the labels in the below sections. Right align the amount/values in this section and align with amounts/values in the below sections.

**Table 2: "System Calculated Annual Income (SCAI) After Deductions"**

Field	Description
Calendar Year	<p>Display the value provided by CalHEERS in SCAI Calendar Year. This value is saved to CH_BUDGET_DETL.SCAI_CALNDR_YR.</p> <p>This field displays a value if the value was provided by CalHEERS; otherwise, it displays as blank.</p> <p>CalHEERS will not send an SCAI Calendar Year unless the Income Calculation Method Used is SCAI.</p>
Total Monthly Amount	<p>Display the value provided by CalHEERS in 'Total System Calculated Monthly Income Amount'. This value is saved in CH_BUDGET_DETL.SCAI_AMT.</p> <p>Bold the field label and the amount.</p>
Total Annual Amount	<p>Display the value provided by CalHEERS for Total SCAI Amount. This value is saved in CH_BUDGET_DETL.SCAI_AMT.</p> <p>This amount displays a value if the value was provided by CalHEERS; otherwise, it displays as blank.</p> <p>CalHEERS will not send an SCAI Total Annual Amount unless the Income Calculation Method Used is SCAI.</p>

- j. Add a new section named, "MAGI Household Budget Used".
  - i. The new section is located below the "System Calculated Annual Income (SCAI) After Deductions".
  - ii. The "MAGI Household Budget Used" section displays the following information:
    1. "Income Calculation Method Used:"
      - a. "Income Calculation Method Used:" is bolded.
      - b. "Income Calculation Method Used:" displays information as outlined on Table 3 below.
    2. "Total Household Members:"
      - a. "Total Household Members:" is bolded.
      - b. "Total Household Members:" displays information as outlined on Table 3 below.
    3. "Total Countable Income:"
      - a. "Total Countable Income:" is bolded.
      - b. "Total Countable Income:" displays information as outlined on Table 3 below.

**Table 3: "MAGI Household Budget Used"**

Field	Description
Income Calculation Method Used	<p>Display 'MAGI PAI (Historical)' if anyone has Income Calculation Method used 'PAI'; otherwise, display the first non-null value provided by CalHEERS in 'Income Calculation Method Used'. This value is saved in CH_BUDGET_HH.INC_METH_CODE.</p> <p>Possible values CMI, RPAI, SCAI, or MAGI PAI (Historical)</p> <p>Bold the field label and the value.</p> <p>Note: This field was not always populated by CalHEERS for historical MAGI Budgets, so the value can be blank.</p>
Total Household Members	<p>Display the value provided by CalHEERS in 'Total Household Members Size'. This value is saved in CH_BUDGET.DETL.HH_SIZE.</p> <p>Bold the field label and the value.</p>
Total Countable Income	<p>This field was moved from the Current Monthly Income (CMI) section (Rec 2.4.3.1.d.)</p> <p>Display the value provided by CalHEERS in 'Total Countable Income Amount'. This value is saved in CH_BUDGET_DETL.COUNT_INC_AMT.</p> <p>Bold the field label and the amount.</p>

2. Create a new Category Code Table for 'MAGI Income Budget Period Used'

CODE NUM IDENTIF	SHORT DECODE	LONG DECODE	CalHEERS Code
CMI	CMI	Current Monthly Income	CMI
RAI	RPAI	Reasonably Projected Annual Income	RAI
SAI	SCAI	System Calculated Annual Income	SAI
PAI	MAGI PAI (Historical)	MAGI Projected Annual Income (Historical)	

**Note:** Historical MAGI Budgets where PAI was used will be converted with recommendation 2.13.2.1

#### 2.5.4 Page Location

---

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Determination Hyperlink -> MAGI Determination Summary -> Name Hyperlink -> MAGI Determination Detail -> View Details Button

#### 2.5.5 Security Updates

---

No Changes

#### 2.5.6 Page Mapping

---

Update Page Mapping per the changes listed in Recs 2.5.3.1-2.

#### 2.5.7 Accessibility

---

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

#### 2.5.8 Page Usage/Data Volume Impacts

---

N/A



## 2.6 MAGI Person Detail

### 2.6.1 Overview

Update the MAGI Person Detail page to display the newly added and updated elements for the EDR and DER.

### 2.6.2 MAGI Person Detail Page Mockup

Additional Information		
Applying for Health Coverage: Yes	Full MC Determination Requested: No	Beneficiary Indicator:
DDSD Disability Indicator:	SSA Disability Indicator:	Deprivation: No
Military/Veteran: No	Spouse or Parent is Military/Veteran: No	Full Time Student: No
Third Party Liability: No		

Figure 2.6.2.1 – MAGI Person Detail Page Additional Information Section with the new Beneficiary Indicator

Verification Type
SSN
SSN Waiver
Applied for SSN
US Citizenship
Immigration Status
Lawful Presence
Qualified Non-Citizen
Five Year Bar Exempt/Met
PRUCOL
PRUCOL - INS Ack
MAGI Income
Projected Annual Income (Exchange Only)

Figure 2.6.2.2 MAGI Person Detail Page Verification Type of the EDR and DER

Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
Salary, Wages		\$1,200.00		Monthly	11/01/2024-	
Social Security Retirement	Jolly	\$14.00		Monthly	11/01/2024-	
Self Employment	Painters are us	\$142.00		Monthly	12/01/2024-	
Caregiver Wages - Other (Lives w/ Recipient)	IHSS	\$150.00		Monthly	01/01/2025-	

Figure 2.6.2.4 MAGI Person Detail Page 'IHSS Indicator sent as 'Yes' under the 'Income' section

Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
Salary, Wages		\$1,200.00		Monthly	11/01/2024-	
Social Security Retirement	Jolly	\$14.00		Monthly	11/01/2024-	
Self Employment	Painters are us	\$142.00		Monthly	12/01/2024-	
Caregiver Wages - Other (Does not live w/ Recipient)	IHSS	\$150.00		Monthly	01/01/2025-	

Figure 2.6.2.5 MAGI Person Detail Page – 'IHSS' Indicator sent as 'No' under the 'Income' section

Income	
Projected Annual Income	(Exchange Only)
Projected Annual Amount: \$	

Figure 2.6.2.6 MAGI Person Detail Page – Addition of 'Exchange Only' to the Projected Annual Income title under the 'Income' Section

Medi-Cal Reasonable Explanation			
Reason	Status	Verification Type	Reasonable Explanation
Other	Confirmed	Current Monthly Income (CMI),	MAGI PAI (Historical)

Figure 2.6.2.7 MAGI Person Detail Page – Updated Medi-Cal Reasonable Explanation section showcasing MAGI PAI (Historical) for historical records under the 'Income' Section

### 2.6.3 Description of Changes

1. Update the 'Additional Information' section of the MAGI Person Detail Page as below.
  - a. Add a field named, "Beneficiary Indicator" to the right of 'Full MC Determination Requested'.
    - i. Display the value sent in the 'beneficiaryInd' element on the EDR based on the recommendation from 2.12.2.6 below.
      1. Possible Values
        - a. Blank
        - b. Yes
  - b. Move the 'Third Party Liability' field below the 'Military/Veteran' field as shown in Figure 2.6.2.1.
2. Update the 'Income' section of the MAGI Person Detail page to add the text (Exchange Only) after the title 'Projected Annual Income' as shown in Figure 2.6.2.6.
3. Update the 'Income' section of the MAGI Person Detail page to display when an individual lives with the In-Home Supportive Services (IHSS) Recipient when the 'Caregiver Wages -Other' Income type is sent in an EDR or received in a DER as follows:
  - a. When the 'Resides with client IHSS Indicator' = Yes, append "(Lives w/Recipient)" to the income Source 'Caregiver Wages-Other' as shown in Figure 2.6.2.4.
  - b. When the 'Resides with client IHSS Indicator' = 'No', append "(Does not live w/Recipient)" to the income Source 'Caregiver Wages – Other' as shown in Figure 2.6.2.5.
  - c. When the 'Resides with client IHSS Indicator' is null, do not append anything to the income Source 'Caregiver Wages-Other'.

**Technical Note:** In-Home Supportive Services (IH) income type is added to eHIT in recommendation 2.12.2.1. 'Resides with client IHSS Indicator' is stored in ICT\_PERS\_INC.LIVES\_WITH\_RECIP\_IND.

4. Update CalHEERS Verification Code (CT\_10590) for Income as follows:

CODE_NUM_IDENTIF	SHORT_DECODE	LONG_DECODE	BEG_DATE	END_DATE
CI	MAGI Current Monthly Income	MAGI Current Monthly Income	01/01/1000	09/21/2025
PI	MAGI Projected Annual Income	MAGI Projected Annual Income	01/01/1000	09/21/2025
CI	MAGI Income	MAGI Income	09/22/2025	
PI	Projected Annual Income (Exchange Only)	Projected Annual Income (Exchange Only)	09/22/2025	

5. Update the MAGI Person Detail page for both EDRs and DERs to display the Verification Type decode dynamically based on Begin and End Date as shown in Figure 2.6.2.2 as follows:
  - a. When viewing a DER, use the Initiated Date of the DER as the effective date of the decode.
  - b. When viewing an EDR, use the 'Ready for Transfer' status date of the EDR as the effective date of the decode. If there is no 'Ready for Transfer' status because the EDR is Pending, then use the 'Pending' status of the EDR as the effective date of the decode.
6. Update MC Reasonable Explanation Verification Type (CT\_10841) Short Decode for Project Annual Income as follows:

CODE_NUM_ID ENTIF	OLD SHORT_DECODE_ NAME (visible to Users in CalSAWS)	NEW SHORT_DECODE_ NAME	NEW LONG_DECODE_ NAME (not visible to users in CalSAWS)
PI	Projected Annual Income (PAI)	MAGI PAI (Historical)	MAGI Projected Annual Income (Historical)

**Note:** No data conversion is required for the REX historical MAGI PAI. The page will display the MAGI PAI (Historical) when a user views an older EDR or DER based on the new decode as shown in Figure 2.6.2.7.

## 2.6.4 Page Location

To view MAGI Person Detail in an EDR

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Determination Hyperlink -> MAGI Determination Summary -> Request ID Hyperlink -> MAGI Request Summary -> Person Name Hyperlink
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Request MAGI button -> MAGI Request Summary -> Person Name Hyperlink
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Request Hyperlink -> MAGI Request Summary -> Person Name Hyperlink
- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** IAT Summary-> Initiated Date Hyperlink -> MAGI Referral Detail -> Request Hyperlink -> MAGI Request Summary -> Person Name Hyperlink

To view MAGI Person Detail in a DER

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** IAT Summary-> Initiated Date Hyperlink -> MAGI Referral Detail -> Person Name Hyperlink

### 2.6.5 Security Updates

---

N/A

### 2.6.6 Page Mapping

---

Update Page Mapping per recommendations in Description of changes section.

### 2.6.7 Accessibility

---

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

### 2.6.8 Page Usage/Data Volume Impacts

---

N/A

## 2.7 Tax Household Detail Page

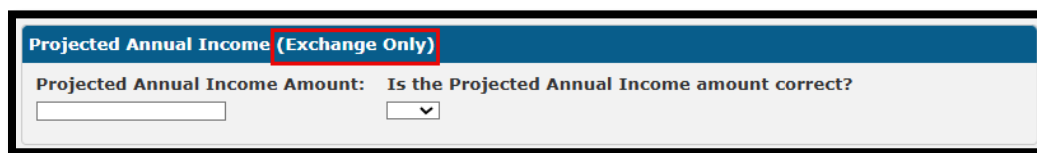
### 2.7.1 Overview

---

Update the 'Tax Household Detail' page 'Projected Annual Income' section label to also indicate it is for Exchange only.

### 2.7.2 Tax Household Detail Mockup

---

A screenshot of a web form titled 'Projected Annual Income (Exchange Only)'. The title is in a blue header bar. Below the header, there are two fields: 'Projected Annual Income Amount:' followed by a text input box, and 'Is the Projected Annual Income amount correct?' followed by a dropdown menu with a downward arrow. The entire form is enclosed in a black border.

**Figure 2.7.2.1 – Tax Household Detail Page – Projected Annual Income (Exchange Only)**

### 2.7.3 Description of Changes

---

1. Rename the 'Projected Annual Income' section label to 'Projected Annual Income (Exchange Only)'.

### 2.7.4 Page Location

---

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial-> Tax Household

## 2.7.5 Security Updates

N/A

## 2.7.6 Page Mapping

N/A

## 2.7.7 Accessibility

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

## 2.7.8 Page Usage/Data Volume Impacts

N/A

# 2.8 Medi-Cal Reasonable Explanation Detail

## 2.8.1 Overview

Update the 'Medi-Cal Reasonable Explanation Detail' page to no longer display the 'Verification Type'.

## 2.8.2 Medi-Cal Reasonable Explanation Detail Mockup

**Medi-Cal Reasonable Explanation Detail**

\* - Indicates required fields

<b>Name: *</b> Fillerman, Jackson 24M	<b>Type: *</b> Income
<b>Reason: *</b> Other	<b>Status: *</b> Confirmed
<b>Begin Month: *</b> 01/2025	<b>End Month: *</b>

**Description:**  
Changed tax filing status from dependent to single.

Last Updated On 08/16/2025 12:23:49 PM By: [1002608](#)

This Type 1 page took 0.62 seconds to load.

**Figure 2.8.2.1 – Medi-Cal Reasonable Explanation Detail Page with 'Verification Type' removed**

## 2.8.3 Description of Changes

1. Update the Medi-Cal Reasonable Explanation Detail page to remove the 'Verification Type' field and values.

#### 2.8.4 Page Location

---

- **Global:** Eligibility
- **Local:** Customer Options
- **Task:** Medi-Cal Reasonable Explanation ->Medi-Cal Reasonable Explanation List ->Medi-Cal Reasonable Explanation Detail

#### 2.8.5 Security Updates

---

N/A

#### 2.8.6 Page Mapping

---

Update Page Mapping per the recommendation 2.8.3.1.

#### 2.8.7 Accessibility

---

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

#### 2.8.8 Page Usage/Data Volume Impacts

---

N/A

## 2.9 SCAI Re-evaluation Batch MAGI Sweep

### 2.9.1 Overview

Create a new 'SCAI Re-evaluation' Batch MAGI Sweep job to identify individuals who are eligible on MAGI Medi-Cal due to the SCAI MAGI Medi-Cal Budget Methodology for reevaluation in January of the following year.

### 2.9.2 Description of Change

1. Add a Batch EDR Run Reason Code for SCAI Re-evaluation EDR Sweep (CT\_2813)

Code	Short Description	Long Description	Reporting Indicator
TBD	SCAI Re-evaluation	System Calculated Annual Income Re-evaluation Eligibility Determination Request	Yes

**Note:** The following reports include Batch EDR Run Reason:

- a. Outstanding Eligibility Determination Request Report
  - b. E-HIT Exception Report No Response from CalHEERS
  - c. E-HIT Exception Report Error Message Received from CalHEERS
  - d. E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization
  - e. MAGI Error Report
  - f. Batch MAGI Skip Report
  - g. MAGI Discontinuance Report
2. Create a new Batch MAGI SCAI Re-evaluation Sweep job to identify Medi-Cal individual(s) who are eligible for MAGI based on the 'SCAI' MAGI Medi-Cal Budget Methodology for reevaluation in January of the next year.
    - a. Identify the target population that meets all the following conditions:
      - i. At least one Medi-Cal individual is Active MEM on a MAGI Medi-Cal aid code in the come-up month
      - ii. The Valid DER has at least one individual with 'Income Calculation Method Used' = SCAI (CH\_BUDGET\_HH.INCOME\_CALC\_USED\_CODE = SAI)
      - iii. The Medi-Cal Renewal Due date is February of the following year or later.



- b. Insert a record into the MAGI staging table (CH\_TRANSACTION) for the individuals for EDR processing for January of the following year (come-up month) as follows:
  - i. **Transact Code:** 'ED'
  - ii. **Program:** Set the program to 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.
  - iii. **Effective Date:** January of following year
  - iv. **Run Reason Code:** 'CO'
  - v. **Batch Indicator:** 'Y'
  - vi. **Batch Reason Code:** set to the new Batch Run Reason code from Recommendation 2.9.2.1.

**Note:** The Batch MAGI processing jobs will run after this sweep and send EDRs for the identified programs to CalHEERS.

### 2.9.3 Execution Frequency

---

Annually, 9 calendar days prior to the last day of November. The first time this job runs is: November 21, 2025. For future years, if November 21 calendar day falls on a holiday or Sunday, the job will run the following business day.

### 2.9.4 Key Scheduling Dependencies

---

Run prior to the Batch MAGI processing jobs (PB00CH100) and after Batch EDBC processing job (PB00E103).

### 2.9.5 Counties Impacted

---

All Counties

### 2.9.6 Category

---

Core

### 2.9.7 Data Volume/Performance

---

Volume estimates cannot be determined because the SCAI data points do not yet exist in CalSAWS. SCAI budgeting methodology is new to the CalHEERS Business Rules Engine with the 25.09 release so only MAGI Determinations post 25.09 release will have SCAI data points.

### 2.9.8 Failure Procedure/Operational Instructions

---

Batch Support Operations staff will evaluate transmission errors and failure 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....)

## 2.10 SCAI Re-evaluation Batch EDBC Sweep Job

### 2.10.1 Overview

Create a new 'SCAI Re-evaluation Batch EDBC Sweep' job to process EDBC for programs where the 'SCAI Re-evaluation' DER returned.

### 2.10.2 Description of Change

1. Add a batch Eligibility Sweep code for the re-evaluation of an SCAI Re-evaluation individual (CT\_942)

Short Decode	Long Decode
MAGI Medi-Cal individual annual re-evaluation due to SCAI budget Methodology	MAGI Medi-Cal individual annual re-evaluation due to System Calculated Annual Income Budget Methodology used for MAGI determination.

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.10.2.2

**Journal Category:** Eligibility

**Journal Type:** Batch EDBC

**Short Description:** Batch EDBC ran for XX/XXXX

**Long Description:** Batch EDBC ran for XX/XXXX. Batch EDBC processed for the Medi-Cal program for the following reason: MAGI Medi-Cal individual annual re-evaluation due to SCAI budget Methodology

2. Create a new Batch EDBC Sweep job to identify Medi-Cal programs for Batch EDBC processing where a DER was received based on an EDR initiated by 'SCAI Re-evaluation' Batch MAGI sweep that meets the following criteria:
  - a. Identify the population for which to run Batch EDBC.
    - i. A DER for benefit month January of next year was received from the EDR initiated by the 'SCAI Re-evaluation' process and the DER status is 'Reviewed'.
    - ii. At least one individual on the Medi-Cal program is an Active MEM effective for January of next year.
    - iii. The DER was received between the last success date and batch date.
  - b. Insert a Batch EDBC Staging record (SYS\_TRANSACTION) for the Medi-Cal program identified above to be processed by Batch EDBC as follows:
    - i. Effective Date = January of following year
    - ii. Type Code = 'BE'
    - iii. Sub Type Code = set to the code value from Recommendation 2.10.2.1
    - iv. Program = set to the program for the identified individual. This does not always match the program ID from the EDR/DER.
    - v. Run Reason Code = 'RE'
    - vi. Run Type Code = Single Program Mode

**Note:** The Batch EDBC processing jobs will run the day after this sweep and run EDBC for the identified programs to authorize the results.

### 2.10.3 Execution Frequency

---

Daily (Monday-Saturday), 8 calendar days prior to the last day of November until and including Batch 10-day cut-off in December.

The first time this job runs is: Daily, beginning on November 22, 2025, through and including December 18, 2025, excluding Sundays and Batch Holidays.

For future years, if November 22 calendar day falls on a holiday, Sunday or Monday, the job will begin the following business day, because it must run at least one day after the SCAI Re-evaluation Batch MAGI Sweep.

### 2.10.4 Key Scheduling Dependencies

---

Run after Batch EDBC processing job (PB00E103). Run at least one day after the SCAI Re-evaluation Batch MAGI Sweep from Rec 2.9

### 2.10.5 Counties Impacted

---

All Counties

### 2.10.6 Category

---

Core

### 2.10.7 Data Volume/Performance

---

Volume estimates cannot be determined because the SCAI data points do not yet exist in CalSAWS. SCAI budgeting methodology is new to the CalHEERS Business Rules Engine with the 25.09 release so only MAGI Determinations post 25.09 release will have SCAI data points.

### 2.10.8 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.)

## 2.11 Batch EDBC Skips

### 2.11.1 Overview

Add new batch EDBC skip reasons to skip Medi-Cal programs from processing EDBC when the DER from 'SCAI Re-evaluation' has income verification pending, or an Active Medi-Cal Member is losing MAGI coverage, or any Member is on aid code 7J without Full Medi-Cal Hierarchy set to Yes.

### 2.11.2 Description of Change

**Note:** The new skip reasons will display on the 'Batch Eligibility Report' and CalSAWS creates a task for the automated action, "Batch EDBC MAGI Medi-Cal Skipped: Review Reason." if the county has the task activated.

1. Add a new Not Processed Reason (CT\_707) code to skip Medi-Cal programs from Batch EDBC processing when an Active Member has income verification in a 'Pending' status in the 'SCAI Re-evaluation' DER.

Code Num Identif	Short Decode Name	Long Decode Name
TBD	MAGI individual has pending MAGI income verif on SCAI Re-evaluation DER	Active Member on Medi-Cal program returned in the System Calculated Annual Income Re-evaluation DER has MAGI income verification in a 'Pending' status.

2. Update the Batch EDBC skip logic to skip Medi-Cal programs with the 'Not Processed Reason' mentioned in 2.11.2.1 when the below are true:
  - a. EDBC was initiated from the 'SCAI Re-evaluation Batch EDBC Sweep' job.
  - b. Any Active MEM on the Medi-Cal program for January of next year is MAGI Eligible or Conditionally Eligible on the DER associated to the SCAI EDR, and that individual has MAGI Income Pending verification on the DER. The Pending MAGI Income (INC) verification could be for e-Verification, Admin Verification or both.
3. Add a new Not Processed Reason (CT\_707) code to skip the Medi-Cal program from EDBC processing when an Active MAGI Member's eligibility is losing MAGI coverage on the 'SCAI Re-evaluation' DER.

Code Num Identif	Short Decode Name	Long Decode Name
TBD	MAGI individual no longer eligible for MAGI on SCAI Re-evaluation DER	Active MAGI Member on Medi-Cal program returned in the System Calculated Annual Income Re-evaluation DER as no longer eligible to MAGI.

4. Update the Batch EDBC skip logic to skip a Medi-Cal program with 'Not Processed Reason' mentioned in 2.11.2.3 when the following are true:
  - a. EDBC was initiated from the 'SCAI Re-evaluation Batch Sweep' job.
  - b. Any Active Member on the Medi-Cal program on a MAGI aid code returned as MAGI Discontinued or MAGI Ineligible on the SCAI DER for January of next year.
5. Add a new Not Processed Reason (CT\_707) code to skip the Medi-Cal program from EDBC processing when an Active Member on aid code 7J does not have Full Medi-Cal Hierarchy = Yes.

Code Num Identif	Short Decode Name	Long Decode Name
TBD	Medi-Cal person on 7J aid code	Medi-Cal person on 7J aid code

6. Update the Batch EDBC skip logic to skip a Medi-Cal program with 'Not Processed Reason' mentioned in 2.11.2.5 when the following are true:
  - a. Any Active Member on the Medi-Cal program on aid code 7J does not have a Customer Option for 'Full Medi-Cal Hierarchy' = Yes for the Batch EDBC benefit month.

**Note:** This skip is not specific to the SCAI re-evaluation process and applies to all Batch EDBCs for Medi-Cal. Future SCR CA-229417 (Revised MC Hierarchy Phase II) has a request to update the Medi-Cal rules themselves for 7J. During design for that SCR, this skip will be evaluated to determine if it needs to be updated or removed accordingly.

### 2.11.3 Execution Frequency

---

N/A

### 2.11.4 Key Scheduling Dependencies

---

N/A

### 2.11.5 Counties Impacted

---

All Counties

### 2.11.6 Data Volume/Performance

---

No measurable amount of data volume or performance change

### 2.11.7 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.)

## 2.12 eHIT

### 2.12.1 Overview

---

Update eHIT logic to receive and display additional MAGI Budget information from CalHEERS. Update eHIT logic to communicate IHSS income type and Lives with Recipient Indicator. Update eHIT outbound logic to communicate Beneficiary Indicator when an individual is transitioning from cash-based or Non-MAGI Medi-Cal to MAGI, and they are evaluated by CalHEERS for the first time. Update eHIT to default 'CMI' Verification Type for Reasonable Explanation.

### 2.12.2 Description of Change

---

1. Update Income Type 'Caregiver Wages -Other' (CT186\_C5) to map to CalHEERS as 'IH' for both inbound (REFER\_TABLE\_15\_DESCR) and outbound (REFER\_TABLE\_14\_DESCR).  
**Technical Note:** Current eHIT mapping logic has conditional criteria for Caregiver Wages-Other depending on if the 'MAGI Medi-Cal: Lives with IHSS Recipient' is checked or not. The conditional criteria is no longer required since the 'residesWithClientIHSSInd' is added to eHIT; if the Income Type is 'Caregiver Wages-Other', map to CalHEERS inbound and outbound 'IH'.
2. Update eHIT inbound logic to consume and save 'residesWithClientIHSSInd' from the DER.
3. Update eHIT outbound logic to send 'residesWithClientIHSSInd' as follows:
  - a. Send 'residesWithClientIHSSInd' = 'Yes', when the 'MAGI Medi-Cal: Lives with IHSS Recipient' is checked on the Income detail page and the income type is 'Caregiver Wages – Other'.
  - b. Send 'residesWithClientIHSSInd' = 'No', when the 'MAGI Medi-Cal: Lives with IHSS Recipient' is not checked on the Income Detail page and the income type is 'Caregiver Wages – Other'.

4. Add the following new Eligibility Evaluation Reasons (CT\_466)

<b>CODE_NUM_IDENTIF</b>	<b>SHORT_DECODE_NAME</b> (visible to Users in CalSAWS)	<b>LONG_DECODE_NAME</b> (not visible to users in CalSAWS)
RU	Reasonably Projected Annual Income Used	Reasonably Projected Annual Income was used for this determination
SU	System Calculated Annual Income Used	System Calculated Annual Income was used in this determination
FR	MAGI Medi-Cal Reasonably Projected Annual Income – Admin Verification Failed	The MAGI Medi-Cal Reasonably Projected Annual Income verification was administratively failed
FC	MAGI Medi-Cal System Calculated Annual Income – Admin Verification Failed	The MAGI Medi-Cal System Calculated Annual Income Verification was administratively failed.

- End date the existing Eligibility Evaluation Reason decodes (CT\_466) and insert new decodes for 'PF' and 'NV' as follows:

<b>CODE_NUM_I DENTIF</b>	<b>SHORT_DECODE E_NAME</b> (visible to Users in CalSAWS)	<b>LONG_DECODE DE_NAME</b> (not visible to users in CalSAWS)	<b>BEG_DATE</b>	<b>END_DATE</b>
<b>PF</b>	MAGI Medi-Cal Projected Annual Income - Admin Verification Failed	The MAGI Medi-Cal Projected Annual Income verification was administratively failed	01/01/1000	09/21/2025
<b>NV</b>	Current Monthly Income And Projected Annual Income Verification Needed	Current Monthly Income And Projected Annual Income Verification Needed	01/01/1000	09/21/2025
<b>PF</b>	Subsidy PAI, CA Subsidy PAI – Admin Verification Failed	The Projected Annual Income Verification for an Exchange consumer is administratively failed	09/22/2025	
<b>NV</b>	Income Verification Needed	Income Verification Needed	09/22/2025	

**Note:** The Eligibility Evaluation Reasons codes (EERC) display on the MAGI Determination Summary, MAGI Determination Detail and MAGI Referral Detail pages in CalSAWS. The EERCs will display the decode based on when the page is accessed and not based on what the historical text was when the DER was received for these EERCs with text updates. To update the pages to be dynamic based on the text when the DER was received is out of scope for this change and will be changed with future SCR CA-291047.



6. Update eHIT outbound logic to populate the 'BeneficiaryInd' = 'Yes' on the EDR when the following conditions are met:

- a. **Individual is receiving Medi-Cal or Cash-Based Medi-Cal in EDR benefit month**

- i. The EDR benefit month is not a Retro Medi-Cal month

- AND either of the following:**

1. Individual is Active MEM on a Medi-Cal program, in any county, in the EDR benefit month. Exclude Active MEMs that are only on the following programs based on aid code.

Medi-Cal Program	Aid Code(s)
Minor Consent	7M, 7N, 7P, 7R
CMSP	50, 85, 88, 89
MSP	80, 8A, 8C, 8D
TPN	73
Dialysis	71
TB	7H

An individual can be on some other Medi-Cal aid code in conjunction with the excluded aid code and they are considered a beneficiary based on the other Medi-Cal aid code. Example: M1 and 80

**Note:** A case with Minor Consent should never be on the same case that is sent to CalHEERS for a MAGI Determination. Minor Consent is listed as a precaution, but not likely a realistic scenario.

**OR**

2. Individual is Active MEM on a cash-based Medi-Cal EDBC program, in any county, in the EDR benefit month. Cash-based Medi-Cal EDBC programs include: CalWORKS, Foster Care, KinGap, AAP, RCA

**OR**

3. Individual has an OPA record for either Medi-Cal or cash-based Medi-Cal program effective at least one day in the EDR benefit month.
        - a. If the OPA for the Medi-Cal program specifies an aid code, exclude if the aid code is listed in 2.12.6.a.i.1 AND also exclude Covered California aid codes (any that begin with 'X'). If the OPA for Medi-Cal program does not specify an aid code, there is no exclusion.
        - b. OPA cash-based Medi-Cal includes: CalWORKS, Foster Care, KinGap, AAP, RCA, SSI Only, SSI/SSP, SSP Only

**b. Individual is transitioning from other Medi-Cal or cash-based Medi-Cal in the month prior to EDR benefit month**

- i. Individual is Pending on the Medi-Cal program in the same case for the EDR benefit month

**AND**

The Individual's current application date is prior to the EDR benefit month

**AND either of the following:**

1. Individual was an Active MEM for Medi-Cal or cash-based Medi-Cal EDBC program, in any county, in the prior month. Exclude Active MEMs that are only on Minor Consent, CMSP, MSP, TPN, Dialysis, TB based on aid code. (see 2.12.6.a.i.1)

**OR**

2. Individual has an OPA record for either Medi-Cal or cash-based Medi-Cal program effective at least one day in the month prior to EDR benefit month.
- a. If the OPA for the Medi-Cal program specifies an aid code, exclude if the aid code is listed in 2.12.6.a.i.1 AND also exclude Covered California aid codes (any that begin with 'X'). If the OPA for Medi-Cal program does not specify an aid code, there is no exclusion.
- b. OPA cash-based Medi-Cal includes: CalWORKS, Foster Care, KinGap, AAP, RCA, SSI Only, SSI/SSP, SSP Only

**Examples**

- A. Individual is discontinued from CalWORKs effective 10/1/2025 and auto-tests into Medi-Cal aid code 38.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be 'Y' because the individual is an Active MEM in MC for 10/2025.

- B. Individual is discontinued from CalWORKs effective 10/01/2025 and auto-tests into a Pending Medi-Cal program. They are not yet granted a Medi-Cal aid code.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be 'Y' because the individual is Pending in Medi-Cal in 10/2025, the application date is copied from the CalWORKs program and it is prior to 10/2025, and they were an Active MEM in CalWORKs in 09/2025.

- C. Individual was on SSI/SSP and SSI/SSP ends 8/31/2025. Individual is put on Craig v Bonta eff 09/01/2025. Individual is Pending on a new MC program with Application Date 09/01/2025 with BDA of 10/2025.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be sent as 'Y' because the individual is Pending on the Medi-Cal program for 10/2025, the application date is prior to 10/2025, and OPA

for the Medi-Cal Program with Craig v Bonta aid code 6E is effective for at least one day in the prior month of 09/2025.

D. Individual is a new applicant to Medi-Cal with app date 10/02/2025.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will not be sent because the individual is Pending and the application date is not prior to the EDR benefit month. The individual is not an Active MEM on MC nor cash-based MC in 10/2025 or 09/2025, and there are no OPA records effective in 09/2025 or 10/2025.

E. Individual is an Active MEM on CMSP in 09/2025 and reports a change in income.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will not be sent because the Individual is an Active MEM on an excluded aid code for 10/2025, there are no cash-based Medi-Cal or OPA records effective 10/2025.

F. Individual is discontinued from Medi-Cal program effective 10/01/2025. The discontinuance is rescinded and the person is Pending on the Medi-Cal program.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be sent = 'Y' because the individual is Pending on the Medi-Cal program, the application date is in the past and the individual was an Active MEM on Medi-Cal in 09/2025.

7. Update eHIT outbound logic to default populating the 'rexVerifType' = 'CMI' when there is a Medi-Cal Reasonable Explanation Detail record in the EDR.
8. Add the below CalHEERS Verification Response Descriptions (CT\_10764).

CODE_NUM_IDENTIF	SHORT_DECODE_NAME	LONG_DECODE_NAME
40	Admin has confirmed income is not verified	Admin has confirmed income is not verified
41	Admin has confirmed income is verified	Admin has confirmed income is verified
42	Income is reasonably compatible	Income is reasonably compatible
43	Income is not reasonably compatible	Income is not reasonably compatible

**Note:** The text will display on the eHIT Response hover-over on MAGI Person Detail page for a DER.

PRUCOL				eHit Response Income is not reasonably compatible
PRUCOL - INS Ack				
MAGI Income	No	1500.00	Pending	

9. Update eHIT inbound logic to save the value in 'totalRPAISCAIAmount' to CH\_BUDGET\_DETL.RPAI\_AMT when 'incomeCalculationMethodUsed'= RAI or save 'totalRPAISCAIAmount' to CH\_BUDGET\_DETL.SCAI\_AMT' when incomeCalculationMethodUsed'= SAI.
10. End date the Income Proof Required code table (CT\_494) for 'CM' and add new decode as follows:

CODE_NUM_I DENTIF	SHORT_DECODE E_NAME (visible to Users in CalSAWS)	LONG_DECODE DE_NAME (not visible to users in CalSAWS)	BEG_DATE	END_DATE
CM	Current Monthly Income Verification required	Current Monthly Income Verification required	01/01/1000	09/21/2025
CM	MAGI Medi- Cal Income Verification required	MAGI Medi- Cal Income Verification required	09/22/2025	

**Note:** The Income Proof Required decode displays on the MAGI Determination Detail page in CalSAWS. The page will display the decode based on when the page is accessed and not based on what the historical text was when the DER was received. To update the page to be dynamic based on the text when the DER was received is out of scope for this change and will be changed with future SCR CA-291047.

### 2.12.3 Interface Partner

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CalHEERS

### 2.12.4 eHIT Schema Version

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Version 23

## 2.13 Data Change

### 2.13.1 Overview

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Run a one-time data change to convert the existing values for 'PAI/CMI used' in the historical MAGI Budget to the new field for 'Income Calculation Methodology Used'.

### 2.13.2 Description of Change

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1. Convert the existing 'PAI\_USED\_IND' in CH\_BUDGET\_HH to a new column 'INCOME\_CALC\_USED\_CODE'.  
The new column is not required, and Null values can exist.
  - a. PAI\_USED\_IND = 'Y' converts to INCOME\_CALC\_USED\_CODE = 'PAI'
  - b. PAI\_USED\_IND = 'N' converts to INCOME\_CALC\_USED\_CODE = 'CMI'
  - c. PAI\_USED\_IND = Null converts to INCOME\_CALC\_USED\_CODE = Null

### 2.13.3 Estimated Number of Records Impacted/Performance

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Approx. 1 billion records

## 2.14 Automated Regression Test

### 2.14.1 Overview

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Create automated regression test scripts to verify that the Income Amount Detail, Expense Amount Detail and Expense Contributors Detail pages can be saved with Begin Date and End Date values more than 5 months in the future.

### 2.14.2 Description of Change

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1. Create regression scripts to verify that the Income Amount Detail page can be saved with Begin Date and End Date values more than 5 months in the future.
2. Create regression scripts to verify that the Expense Amount Detail page can be saved with Begin Date and End Date values more than 5 months in the future.
3. Create regression scripts to verify that the Expense Contributors Detail page can be saved with Begin Date and End Date values more than 5 months in the future.