

CalSAWS

California Statewide Automated Welfare System

A large circular graphic composed of concentric circles and a geometric pattern of teal and green triangles. In the center, a group of hands of various skin tones are stacked together in a huddle. Overlaid on this is a semi-transparent circle containing the text "THE POWER OF 58" in a stylized font. The number "58" is large and bold, with green tick marks radiating from it like a clock face.

THE
POWER
OF
58

CA-283798

2025 Updates to the Single Streamlined Application (SSApp)

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CA-283798 – 2025 Updates to the Single Streamlined Application (SSApp)

1 OVERVIEW

Per Department of HealthCare Services (DHCS), the online Single Streamline Application (SSApp), through the California Healthcare Eligibility, Enrollment and Retention System (CalHEERS) portal, needs to be updated to meet Centers for Medicare & Medicaid Services (CMS) requirements, federal and state regulations, and state law; to update messages for consistency with the paper SSApp; to ensure accurate eligibility determinations; and to improve consumer experience.

The purpose of this SCR is to make similar portal changes across all applications including CalHEERS, California Statewide Automated Welfare System (CalSAWS) and BenefitsCal for consistency with the paper SSApp based on changes outlined with CalHEERS Change Request 287402 and SAWS Cost Estimation Request for Research and Analysis (SIRFRA)1399.

1.1 Current Design

Currently, counties have their own existing county business process to enter an individual as 'Homeless' in CalSAWS.

Counties may indicate in CalSAWS that an individual is experiencing homelessness in the following ways:

- a. Adding 'HOMELESS', 'GENERAL DELIVERY', or a 'District Office Address' in Address Line 1 on the Address Detail Page under physical/mailling address, or
- b. Adding a Living Arrangement Record of Type 'Homeless', 'Homeless Shelter', 'Shelters for Battered Persons', 'Temporary Housing or Shelter', or 'Motel/Hotel/SRO' on the Living Arrangement Detail Page

There is no definitive process to define homelessness in the system today and none of the above mentioned data collection(s) leads to any communication of homelessness with CalHEERS.

CalSAWS always sends a complete address to CalHEERS via eHIT with following required fields: Address Line1, City, State, Zip Code

If the physical address is missing entirely for any individual, CalSAWS prevents sending an EDR in Batch or when MAGI is requested on MAGI Determination List page with the following messages:

Existing Batch Skip: 'Missing Address records'

Existing Page Validation: A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- An address is required for the following person(s):
 - <Person Name>

The screenshot shows a web interface titled "MAGI Determination List". At the top, a red asterisk icon is followed by the text "Indicates required fields". Below this, a red message states: "A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:". This is followed by a red bullet point: "An address is required for the following person(s):", which is then followed by a red circle icon and the text "Test Homeless". Below the message, there is a section titled "Request MAGI Determination" with a blue header. Under this header, there are three fields: "Begin Month: *" with a dropdown menu showing "04/2025", "End Month: *" with a dropdown menu showing "09/2025", and "Program Identifier: *" with a dropdown menu showing "Medi-Cal".

Criteria: At least one individual on the MAGI Request is missing a high dated Physical Address (Address_Type_Code = 'PH').

CalSAWS does not have the validations to prevent sending an EDR if a Mailing Address is missing.

Currently, CalSAWS does not store and display the applicant's Gender Identity and Sexual Orientation on the e-Application Summary when received from the Self-Service Portal (SSP).

Also, one of the options on Individual Demographics Page and on SSP for 'Reason for no SSN' is 'I do not qualify for an SSN'.

1.2 Requests

With CalHEERS CR-287402, CalHEERS will add a homeless indicator to eHIT and allow Physical Address Line 1 to be blank on their portal and in eHIT. CalHEERS will update the Reason for No SSN 'I do not qualify for an SSN' to read, 'Does not qualify for SSN or may only be issued one for valid non-work reason' per the updates in the SSApp.

CalSAWS will be updated to accommodate the above eHIT changes as follows:

1. CalSAWS will consume and display homeless indicator and send homeless indicator via eHIT
2. CalSAWS will update Information Transaction Update Job to send homeless indicator via eHIT
3. CalSAWS will prevent sending an EDR with a missing mailing address
4. CalSAWS will update the "Reason for No SSN" display language

CalSAWS will also update e-Application Summary and SSP to communicate the selections for Gender Identity and Sexual Orientation information.

1.3 Overview of Recommendations

1. Update the MAGI Person Detail Page to display Homeless Indicator received in the DER and sent in the EDR via eHIT.
2. Update the MAGI Referral Detail Page, the MAGI Request Detail Page, and the Information Update Detail Page to display Homeless Indicator received in the referral via eHIT.
3. Update the "CalHEERS Update Transaction" table with new element for Homeless to be communicated through the Information Update transaction via eHIT.
4. Add validation to the MAGI Determination List Page when requesting MAGI to prevent sending missing mailing address via eHIT.
5. Update the existing Batch MAGI Skip criteria for missing address.
6. Update the eHIT logic including eHIT Inbound and Outbound Information to send and receive 'Homeless' information.
7. Update the Long and Short Description for 'I do not qualify for an SSN' found under the 'Reason for no SSN' field to 'Does not qualify for SSN, or may only be issued one for valid non-work reason'.
8. Updated the e-Data logic on the Individual Demographic page to include the existing "Gender Identity" and "Sexual Orientation" fields.

1.4 Assumptions

1. Per DHCS Confirmation, all related Correspondence changes will be captured as part of a future effort.
2. Per SIRFRA 1399, DHCS requested to add the requirement below:
"Ensure that applicants who indicate they are naturalized or derived citizens are prompted to include their alien number"
Although currently Alien Number is already being sent in Medi-Cal Eligibility Data System (MEDS) transactions by CalSAWS. Hence, relevant MEDS transactions will be regression tested.
3. Since there will be no new data or a new data element to be sent to MEDS, no MEDS changes are required.
4. All existing online functionalities will remain unchanged unless mentioned in the description of changes.
5. Per SIRFRA 1399, DHCS requested to add the requirement below:
"Modify Rights and Responsibilities"
Although any updates to Rights and Responsibilities and Medi-Cal Estate Recovery language will be implemented with CA-290964 as part of a future effort.
6. eHIT Schema V23 will be implemented with CA-283790 in Release 25.09

2 RECOMMENDATIONS

2.1 MAGI Person Detail Page

2.1.1 Overview

Update the MAGI Person Detail Page to display Homeless Indicator received in the DER and sent in the EDR via eHIT.

2.1.2 MAGI Person Detail Page Mockup

The mockup displays the 'Address Information' section of the MAGI Person Detail Page. It includes three checkboxes: 'Physical Address same as Primary's:' (No), 'Mailing Address same as Primary's:' (No), and 'Residing Outside Country/US:' (blank). Below these is a table with columns: Type, Address, County, Begin Date, and End Date. The table has two rows: 'Physical' and 'Mailing'. The 'Address' column is highlighted with a red box. Below the table, there are three fields: 'Temporarily Out of the State:' (No), 'No Permanent Home Address:' (No), and 'Homeless:' (Yes). The 'Homeless' field is highlighted with a red box.

▼ Address Information				
Physical Address same as Primary's:	Mailing Address same as Primary's:	Residing Outside Country/US:		
No	No			
Type	Address	County	Begin Date	End Date
Physical	SAN BERNARDINO, CA 92410-1825	San Bernardino	06/20/2025	
Mailing	801 MAIN ST SAN BERNARDINO, CA 92410-1825	San Bernardino	06/20/2025	
Temporarily Out of the State:		No Permanent Home Address:		
No		No		
		Homeless:		
		Yes		

Figure 2.1.1 – MAGI Person Detail Page – ‘Homeless’ field added to the Address Information section received in the DER with blank addressline1 field and updated field ‘Temporarily Out of the State’

The mockup displays the 'Address Information' section of the MAGI Person Detail Page. It includes three checkboxes: 'Physical Address same as Primary's:' (No), 'Mailing Address same as Primary's:' (No), and 'Residing Outside Country/US:' (blank). Below these is a table with columns: Type, Address, County, Begin Date, and End Date. The table has two rows: 'Physical' and 'Mailing'. The 'Address' column is highlighted with a red box. Below the table, there are three fields: 'Temporarily Out of the State:' (No), 'No Permanent Home Address:' (No), and 'Homeless:' (Yes). The 'Homeless' field is highlighted with a red box.

▼ Address Information				
Physical Address same as Primary's:	Mailing Address same as Primary's:	Residing Outside Country/US:		
No	No			
Type	Address	County	Begin Date	End Date
Physical	801 MAIN ST SAN BERNARDINO, CA 92410-1825	San Bernardino	06/20/2025	
Mailing	801 MAIN ST SAN BERNARDINO, CA 92410-1825	San Bernardino	06/20/2025	
Temporarily Out of the State:		No Permanent Home Address:		
No		No		
		Homeless:		
		Yes		

Figure 2.1.2 – MAGI Person Detail Page – ‘Homeless’ field added to the Address Information section sent in the EDR and updated field ‘Temporarily Out of the State’

2.1.3 Description of Changes

1. Add a field named “**Homeless:**” in the ‘Address Information’ section of the MAGI Person Detail Page to display the value in the DER or EDR as shown in Figure 2.1.1 and Figure 2.1.2
 - a. Display “Homeless:” to the right of ‘No Permanent Home Address’ field.
 - b. Possible values will be ‘Yes’, ‘No’, Blank

Note: The indicator is an optional field in the schema, hence when not answered the value can be received as Blank in eHIT

If set to Yes, the value indicates that the individual attested to experiencing homelessness (Please refer to recommendation 2.11.2.3)

Please Note: Currently ‘No Permanent Home Address’ field is sent and received as noPermanentHomeAddressInd in the eHIT schema.

CalSAWS sets this field as ‘Yes’ only when the CalSAWS case has the following program(s) on the case: Homeless – Perm and/or Homeless – Temp

CalHEERS sends this field as ‘Yes’ when an individual indicates that they are college students, seasonal workers, etc. on the CalHEERS portal.

There will be no change to the existing logic of this field with the scope of this SCR.

2. Rename existing field “Temporary Out of the State” to “Temporarily Out of the State”

2.1.4 Page Location

- **Global:** Case Info **or** Eligibility
- **Local:** IAT Summary **or** Customer Information
- **Task:** Inter-Agency Transfer Summary>MAGI Referral Search>MAGI Referral Detail>MAGI Person Detail **or** MAGI>MAGI Eligibility>MAGI Determination List>MAGI Request Detail>MAGI Person Detail

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update per the changes in 2.1.3 Description of changes.

Also, Update existing Page Mapping Description for the field “No Permanent Home Address” to say – “**This indicator represents that the person’s address is not permanent for example seasonal workers, military, etc.**”

Instead of ‘This is the indicator that represents whether a person is homeless or not’.

2.1.7 Accessibility

Accessibility was assessed and no updates are needed on the MAGI Person Detail page.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 MAGI Referral Detail Page

2.2.1 Overview

Update the MAGI Referral Detail Page to display Homeless Indicator received in the referral via eHIT.

2.2.2 MAGI Referral Detail Page Mockup

The mockup displays the 'Application' section of the MAGI Referral Detail Page. It contains several fields organized in a grid. The 'Homeless' field, located in the third row, third column, is highlighted with a red border. Below the 'Application' section is the 'Case Members' section, which contains a table with one row of data for 'Test, Homeless 25F'.

Application							
Application Date: 04/01/2025	Primary Applicant/Recipient: Test, Homeless 25F	Application Source: SAWS					
Life Change Event:	Life Change Event Date:	Requested Retro: No					
Maintain Verifications: 5	Consent for Verifications: Yes	Homeless: Yes					
R&R Agreed: Yes	Signed Status/Date: Signed on 04/01/2025						

Case Members							
Name	DOB	SSN	CIN	CalSAWS PN	CalHEERS PN	Non-Compliance	CalSAWS Person
Test, Homeless 25F	08/08/2000	053-98-4688	797885516	01	01		Yes

Figure 2.2.1 – MAGI Referral Detail Page – ‘Homeless’ field added to the Application section received in the referral

2.2.3 Description of Changes

1. Add a field named “**Homeless:**” in the ‘Application’ section of the MAGI Referral Detail Page to display the value in the DER as shown in Figure 2.2.1
 - a. Display “Homeless:” to the right of ‘Consent for Verifications:’ field.
 - b. Possible values will be ‘Yes’, ‘No’, Blank

Note: The indicator is an optional field in the schema, hence when not answered the value can be received as Blank in eHIT

If set to Yes, the value indicates that at least one individual attested to experiencing homelessness (Please refer to recommendation 2.11.2.3)

2.2.4 Page Location

- **Global:** Case Info
- **Local:** IAT Summary
- **Task:** Inter-Agency Transfer Summary>MAGI Referral Search>MAGI Referral Detail

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update per the changes in 2.2.3 Description of changes.

2.2.7 Accessibility

Accessibility was assessed and no updates are needed on the MAGI Referral Detail page.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 MAGI Request Detail Page

2.3.1 Overview

Update the MAGI Request Detail Page to display Homeless Indicator sent in the EDR via eHIT.

2.3.2 MAGI Request Detail Page Mockup

The mockup shows a form titled 'Application' with a blue header. The form is divided into three columns. The first column contains 'Application Date: 04/01/2025', 'Life Change Event:', 'Maintain Verifications: 5', and 'R&R Agreed: Yes'. The second column contains 'Primary Applicant/Recipient: Test, Homeless 25F', 'Life Change Event Date:', 'Consent for Verifications: Yes', and 'Signed Status/Date: Signed on 04/01/2025'. The third column contains 'Application Source: SAWS', 'Requested Retro: No', and 'Homeless: Yes'. The 'Homeless: Yes' field is highlighted with a red border.

Application		
Application Date: 04/01/2025	Primary Applicant/Recipient: Test, Homeless 25F	Application Source: SAWS
Life Change Event:	Life Change Event Date:	Requested Retro: No
Maintain Verifications: 5	Consent for Verifications: Yes	Homeless: Yes
R&R Agreed: Yes	Signed Status/Date: Signed on 04/01/2025	

Figure 2.3.1 – MAGI Request Detail Page – ‘Homeless’ field added to the Application section sent in the EDR

2.3.3 Description of Changes

1. Add a field named “**Homeless:**” in the ‘Application’ section of the MAGI Referral Detail Page to display the value in the EDR as shown in Figure 2.3.1
 - a. Display “Homeless:” to the right of ‘Consent for Verifications:’ field.
 - b. Possible values will be ‘Yes’, ‘No’, Blank

Note: The indicator is an optional field in the schema, hence when not answered the value can be received as Blank in eHIT

If set to Yes, the value indicates that at least one individual attested to experiencing homelessness (Please refer to recommendation 2.11.2.3)

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update per the changes in 2.3.3 Description of changes.

2.3.7 Accessibility

Accessibility was assessed and no updates are needed on the MAGI Request Detail page.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Information Update Detail

2.4.1 Overview

Update the Information Update Detail Page to display Homeless Indicator received in the Inbound Information Update transaction type via eHIT.

2.4.2 Information Update Detail Page Mockup

The mockup shows a web form titled "Information Update Detail" with a "Close" button in the top right. Below the title is a summary section with three columns: "MAGI Case Number:" (5000036254), "Case Number:" (2678273), and "Case Name:" (Test Homeless). Below this are "Referral Date:" (06/02/2025), "Type:" (Information Update), and "Status:" (Complete). A section titled "Person Details" contains a table with the following data:

PN#	Name	Ethnic	Hispanic	Spoken Language	Written Language	Homeless
01	Test Homeless	White	No	English	English	Yes

The "Homeless" column header and the "Yes" value in the first row are highlighted with a red box.

Figure 2.4.1 – Information Update Detail Page – ‘Homeless’ field added to the Contact Details section received via eHIT

2.4.3 Description of Changes

1. Add a field named “**Homeless**” in the ‘Person Details’ section of the Information Update Detail Page to display the value in the Information Transaction Type received via eHIT as shown in Figure 2.4.1
 - a. Display “Homeless” to the right of ‘Written Language’ field.
 - b. Possible values will be ‘Yes’, ‘No’ or Blank

Note: The indicator is an optional field in the schema, hence when not answered the value can be received as Blank in eHIT

If set to Yes, the value indicates that the individual attested to experiencing homelessness otherwise set to ‘No’.

2. Add new column ‘Homeless’ on the Information Update Detail Page

2.4.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search>Select Determination Type 'Information Update'>Information Update Detail

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update per the changes in 2.4.3 Description of changes.

2.4.7 Accessibility

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

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 MAGI Determination List Page

2.5.1 Overview

Add a validation to the MAGI Determination List Page when requesting MAGI to prevent sending an EDR with a missing mailing address.

2.5.2 MAGI Determination List Page Mockup

MAGI Determination List

*- Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- A physical address is required for the following person(s):
 - Test Homeless

Request MAGI Determination

Begin Month: * 04/2025 ▾ **End Month: *** 09/2025 ▾

Program Identifier: * Medi-Cal ▾

Figure 2.5.1 – MAGI Determination List Page – Validation message for missing Physical Address

MAGI Determination List

*- Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- A mailing address is required for the following person(s):
 - Test Homeless

Request MAGI Determination

Begin Month: * 04/2025 ▾ **End Month: *** 09/2025 ▾

Program Identifier: * Medi-Cal ▾

Figure 2.5.2 – MAGI Determination List Page – Validation message for missing Mailing Address

2.5.3 Description of Changes

1. Update the existing missing address validation verbiage on the MAGI Determination List Page to prevent sending an EDR that's missing a physical address for any individual.

Updated Validation Message: A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- Physical address is required for the following person(s):
 - <Person Name>

Note: This is a hard validation.

2. Add a new page validation on the MAGI Determination List Page to prevent sending an EDR that's missing a mailing address when the following condition is met from the criteria for individuals on the EDR.

Criteria:

- a. When any individual on the MAGI Request is missing a high dated mailing address (Address Type_Code = 'ML')

Validation Message: A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- Mailing address is required for the following person(s):
 - <Person Name>

Note: This is a hard validation.

2.5.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI>MAGI Eligibility>MAGI Determination List Page>Request MAGI

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Accessibility

Accessibility was assessed and no updates are needed on the MAGI Determination List page.

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 e-Application Summary

2.6.1 Overview

The e-Application Summary page displays the application information submitted by an SSP customer. The worker uses this page to perform file clearance duties and link the e-Application information to a case.

2.6.2 e-Application Summary Mockup

Primary Applicant Information		
First Name: Jane	Middle Name:	Last Name: Doe
Name Suffix:	Maiden Name:	ATIN/ITIN:
SSN:	Has SSN: No	<div>Reason For No SSN: Does not qualify for SSN or may only be issued one for valid non-work reason</div>
Date of Birth: 10/10/1991	Gender: Female	Marital Status: Married
Spoken Language: English	Written Language: English	Marital Date:
Pregnant: No		Birth Country:
Hispanic Indicator: No	Employed:	Occupation:
Federally Recognized Tribe:	Indian Cost Sharing:	PDJ#:
Optional Sexual Orientation and Gender Identity (SOGI) Information		
Gender Identity: Female	Sexual Orientation: Straight or Heterosexual	
Transfer Status: Pending		

Figure 2.6.1 – e-Application Summary Mockup

2.6.3 Description of Changes

1. Display the new “No SSN Reason”: “Does not qualify for SSN or may only be issued one for valid non-work reason” when this is selected by the SSP applicant.
 - a. This replaces the “Does not qualify for SSN” reason.
2. Add a new sub-section under the ‘Primary Applicant Information’ section with the title ‘Optional Sexual Orientation and Gender Identity (SOGI) Information’ with the following fields displayed inside (Refer to Figure 2.6.1):
 - a. Gender Identity
 - i. The field can display one of the following:
 1. Female
 2. Male
 3. Another Gender Identity
 4. Transgender: Male to Female
 5. Transgender: Female to Male
 6. Non Binary (neither male nor female)
 7. Decline to State
 8. <blank>

- a. This value displays when the answer was not provided, or the e-Application was submitted prior to the deployment of this SCR.
- b. Sexual Orientation
 - i. The field can display one of the following:
 1. Straight or Heterosexual
 2. Gay or Lesbian
 3. Bisexual
 4. Another Sexual Orientation
 5. Unknown
 6. Queer
 7. Decline to State
 8. <blank>
 - a. This value displays when the answer was not provided, or the e-Application was submitted prior to the deployment of this SCR.

2.6.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update Page Mapping to include Gender Identity and Sexual Orientation.

2.6.7 Accessibility

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

2.6.8 Page Usage/Data Volume Impacts

No impact to this section.

2.7 e-Application Person Detail

2.7.1 Overview

The e-Application Person Detail page displays the other applicant's person information. The worker uses this page to perform file clearance duties and link the e-Application information to a case.

2.7.2 e-Application Person Detail Mockup

e-Application Person Detail

*- Indicates required fields Close

First Name: Mimi	Middle Name:	Last Name: Doe
Name Suffix:	Maiden Name:	ATIN/ITIN:
SSN:	Has SSN: No	Reason For No SSN: Does not qualify for SSN or may only be issued one for valid non-work reason
Date of Birth: 05/14/2008	Gender: Female	Marital Status:
Language:	Hispanic Indicator:	Birth Country:
Programs: MC, CF		

Figure 2.7.1 – e-Application Person Detail Reason for No SSN Mockup

Homeless County:

Email: mickeymouse123@mailinator.com	Phone Number: (123)534-5433
Phone Extension:	Phone Type: Work
Elderly:	Disabled, Blind, Pregnant:
Without money for food:	Migrant/Seasonal Farmworker:
Tax Dependent:	Teen Parent:
Hardship:	
Is Mimi Doe X's other biological or adoptive parent deceased?	Is Mimi Doe X's other biological or adoptive parent out of the home?
Applying for Health Coverage:	Shots up to date:
Receives In-home Supportive Services (IHSS):	IHSS Monthly Cost:
PDJ#:	

Optional Sexual Orientation and Gender Identity (SOGI) Information

Gender Identity: Female	Sexual Orientation: Straight or Heterosexual
-----------------------------------	--

Figure 2.7.2 – e-Application Person Detail SOGI Mockup

2.7.3 Description of Changes

1. Display the new “No SSN Reason”: “Does not qualify for SSN or may only be issued one for valid non-work reason” when this is selected by the SSP applicant.
 - a. This replaces the “Does not qualify for SSN” reason.
2. Add a new sub-section to the page with the title ‘Optional Sexual Orientation and Gender Identity (SOGI) Information) with the following fields displayed inside (Refer to Figure 2.7.2):
 - a. Gender Identity
 - i. The field can display one of the following:
 1. Female
 2. Male
 3. Another Gender Identity
 4. Transgender: Male to Female
 5. Transgender: Female to Male
 6. Non Binary (neither male nor female)
 7. Decline to State
 8. <blank>
 - a. This value displays when the answer was not provided, or the e-Application was submitted prior to the deployment of this SCR.
 - b. Sexual Orientation
 - i. The field can display one of the following:
 1. Straight or Heterosexual
 2. Gay or Lesbian
 3. Bisexual
 4. Another Sexual Orientation
 5. Unknown
 6. Queer
 7. Decline to State
 8. <blank>
 - a. This value displays when the answer was not provided, or the e-Application was submitted prior to the deployment of this SCR.

2.7.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

Update Page Mapping to include Gender Identity, and Sexual Orientation.

2.7.7 Accessibility

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

2.7.8 Page Usage/Data Volume Impacts

No impact to this section.

2.8 Individual Demographics Detail

2.8.1 Overview

The Individual Demographics Detail page displays detailed information for a person. This SCR will update the short and long description for one of the options on the Reason for no SSN field, the e-Data logic on the page be updated to include the existing "Gender Identity" and "Sexual Orientation" fields.

2.8.2 Individual Demographics Detail Mockup

The mockup shows a web form titled "Individual Demographics Detail". At the top right are buttons for "Images", "Save and Return", and "Cancel". Below the title is a legend: "*- Indicates required fields". A section titled "e-Data Comparison" contains a table with four columns: "Field Name", "Existing Value", "e-Data Value", and "Source". The table lists various demographic fields, with "Gender Identity" and "Sexual Orientation" highlighted by a red border. At the bottom right is an "Import Selected Data" button.

<input checked="" type="checkbox"/> Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Last Name	Doe	Doe	Self Service Portal
<input checked="" type="checkbox"/> First Name	John	john	Self Service Portal
<input checked="" type="checkbox"/> Middle Name/Initial	Ddd	ddd	Self Service Portal
<input checked="" type="checkbox"/> Marital Status		Common Law	Self Service Portal
<input checked="" type="checkbox"/> Gender	Male	Male	Self Service Portal
<input checked="" type="checkbox"/> Date of Birth	10/10/1970	10/10/1970	Self Service Portal
<input checked="" type="checkbox"/> Hispanic/Latino		Yes	Self Service Portal
<input checked="" type="checkbox"/> Gender Identity	Male	Male	Self Service Portal
<input checked="" type="checkbox"/> Sexual Orientation		Straight or Heterosexual	Self Service Portal
<input checked="" type="checkbox"/> Spoken Language	English	English	Self Service Portal
<input checked="" type="checkbox"/> Written Language	English	English	Self Service Portal

Figure 2.8.1 – Individual Demographics Detail (e-Data Comparison)

SSN	Verification Status	Begin Date	End Date
	Pending	01/01/2025	

Figure 2.8.2 - Individual Demographics Detail (Reason for no SSN option update)

Figure 2.8.3 - Individual Demographics Detail (SOGI section with e-Data)

2.8.3 Description of Changes

1. Update both the Short Description and Long Description for 'I do not qualify for an SSN' found under the 'Reason for no SSN' field to 'Does not qualify for SSN or may only be issued one for valid non-work reason'.

Note: All existing records that have the option of 'I do not qualify for an SSN' selected on the 'Reason for no SSN' field will automatically be updated to display 'Does not qualify for SSN or may only be issued one for valid non-work reason'.

2. Add e-Data logic to the following fields (Refer to Figures 2.8.1 and 2.8.3):
 - a. Gender Identity
 - b. Sexual Orientation

Note: e-Data arrow icon will display on these fields when e-data information is available.

Note: Gender Identity and Sexual Orientation information will automatically be displayed on the e-Data Comparison section when information is available.

2.8.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Individual Demographics

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Accessibility

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

2.8.8 Page Usage/Data Volume Impacts

N/A

2.9 Batch MAGI

2.9.1 Overview

Update the existing Batch MAGI Skip criteria for missing address (CT707_AD_MISSING_ADDRESS_RECORDS).

2.9.2 Description of Change

1. Update the Batch MAGI Skip logic for missing address (CT707_AD) to include check for missing mailing address along with existing check for missing physical address.

Updated Criteria: Skip if any of the following is true:

- a. missing a high dated physical address for any individual in the EDR (Address Type_Code = 'PH')
- b. missing a high dated mailing address for any individual in the EDR (Address Type_Code = 'ML')

2.9.3 Execution Frequency

No Change

2.9.4 Key Scheduling Dependencies

No Change

2.9.5 Counties Impacted

All Counties

2.9.6 Category

All

2.9.7 Data Volume/Performance

No Changes

2.9.8 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.)

2.10 Update Transaction Batch Job

2.10.1 Overview

Update the "CalHEERS Update Transaction" table with new element for Homeless to be communicated through the Information Update transaction via eHIT.

2.10.2 Description of Change

1. Update PB00CH201 CalHEERSUpdateTransactionTables to add new column for Homeless.
Add the new information to the existing data collection check logic for identifying case changes to send an Information Update.
2. Update the Update Transaction logic to send the 'Homeless' information in the Update Transaction as follows:

- a. **Homeless:** When a Living Arrangement record with the Living Arrangement Type listed below is effective as of the Batch Date then send the 'Homeless' indicator = 'Yes' otherwise don't send the element

Living Arrangement Type:

- i. Homeless
- ii. Homeless Shelter
- iii. Shelters for Battered Persons
- iv. Temporary Housing or Shelter
- v. Motel/Hotel/SRO

Technical Note:

If the expected Living arrangement record is completely deleted prior to an update transaction being sent removing the Homeless Type, the Update Transaction logic will not detect the record deletion and CalHEERS will be informed of the change on the next EDR where the Homeless element is not being sent and will treat that as a Null value.

2.10.3 Execution Frequency

Daily

2.10.4 Key Scheduling Dependencies

PB00CH201 is a predecessor to PB00CH200.
Execute PB00CH201 after Batch MAGI completes and the 'Stop Listener' job (PB00CH103) is executed

2.10.5 Counties Impacted

All Counties

2.10.6 Category

Core

2.10.7 Data Volume/Performance

N/A

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 eHIT

2.11.1 Overview

Update the eHIT logic including eHIT Inbound and Outbound Information to send and receive 'Homeless' information.

2.11.2 Description of Change

1. Add a new attribute code to CT_440 as shown below to capture and store the new 'Homeless' field:

CODE_NUM_ IDENTIF	SHORT_DECODE_ NAME	LONG_DECODE_ NAME	REFER_TABLE_3_DESCR
HO	HOMELESS_IND	Homeless Indicator	ICT_PERS_ATTR

2. Update eHIT Inbound logic to store the Homeless Indicator when received in a DER.
3. Update eHIT outbound logic to send the 'Homeless' (homelessInd) value in the EDR when an individual is experiencing Homelessness.

Criteria: A Living Arrangement Record effective the EDR Benefit Month exists with the Type:

- a. Homeless
- b. Homeless Shelter
- c. Shelters for Battered Persons
- d. Temporary Housing or Shelter
- e. Motel/Hotel/SRO

Possible Values: 'Yes' or element not sent

Outcome: Homeless Indicator will be set to 'Yes', when above mentioned record in the criteria exists otherwise don't send the element.

2.11.3 Interface Partner

CalHEERS

2.11.4 eHIT Schema Version

Version 23

2.12 Regression Test Outbound MEDS Transactions

2.12.1 Overview

Regression test outbound MEDS transactions that include Alien Number.

2.12.2 Description of Change

1. Regression test following outbound MEDS transactions that include Alien Number:
 - a. AP18
 - b. AP19
 - c. AP34
 - d. EW12
 - e. EW20
 - f. HA20

2.12.3 Partner Integration Testing

No.

2.12.4 Execution Frequency

No change.

2.12.5 Key Scheduling Dependencies

No change.

2.12.6 Counties Impacted

All counties.

2.12.7 Category

No change.

2.12.8 Data Volume/Performance

No change.

2.12.9 Interface Partner

Medi-Cal Eligibility Data System (MEDS)

2.12.10 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...)

2.13 Update Application Transfer API to Store SOGI fields

2.13.1 Overview

The Application Transfer API is a RESTful service that stores the application information provided by applicant when they submit an e-Application from the SSP. This will be updated to store the SOGI data when it is received.

2.13.2 Description of Change

1. Implement and store the following fields as stated in the Application Transfer API documentation:

POST – Application Transfer API - Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
genderIdentity	String (2 char min, 3 char max)	523 - This category references the gender of the person AN: Another Gender Identity, FE: Female, FM: Transgender: Female to Male, MA: Male, MF: Transgender: Male to Female, ST: Decline to State	No
sexualOrientationCode	String (2 char min, 3 char max)	524 - This category references the Person sexual orientation. AN: Another Sexual Orientation, BI: Bisexual, DS: Decline to State, GL: Gay or Lesbian, QU: Queer, SH: Straight or Heterosexual, UN: Unknown	No

2.13.3 Partner Integration Testing

No.

2.13.4 Execution Frequency

No change.

2.13.5 Key Scheduling Dependencies

No change.

2.13.6 Counties Impacted

All counties.

2.13.7 Category

No change.

2.13.8 Data Volume/Performance

No change.

2.13.9 Interface Partner

SSP

2.13.10 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...)

2.14 Automated Regression Test

2.14.1 Overview



Create new regression test scripts based on the system test scenarios for the Application Transfer API and associated page changes outlined above.

2.14.2 Description of Change

1. Evaluate each system test scenario associated to the Application Transfer API and associated page changes for the potential of automation. Known exclusionary criteria:
 - a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
 - b. Technical limitations (ex., visual comparison of a static document against a template)

- c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
 - d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
- 2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
 - a. Repeatability: The script must be able to execute multiple times between data refreshes
 - b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	Application Transfer YAML file	 ApplicationTransfer.y aml
2	Interface	Application Transfer HTML file	 ApplicationTransfer.h tml