

# CalSAWS

California Statewide Automated Welfare System



# Design

## **CA-263304**

Discontinue Medi-Cal for Non-Receipt of MC 176  
TMC

DOCUMENT APPROVAL HISTORY

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# CA-263304 – Discontinue Medi-Cal for Non-Receipt of MC 176 TMC

## 1 OVERVIEW

The purpose of this SCR is to reinstate the monthly batch process that discontinues Transitional Medi-Cal (TMC) individuals for not submitting the TMC Quarterly Status Report (MC 176 TMC). In addition to reinstatement of the batch, this SCR handles the TMC discontinuance at the person-level, how some income is handled, how the status report is updated to complete, and elimination of the renewal packet for some TMC households.

### 1.1 Current Design

Currently, when the following criteria is met the System auto sets the EDBC Run Reason to TMC 176 S and when the Regular EDBC is Accepted and Saved, the TMC report Status is updated to 'Complete – EDBC Accepted':

- The submit month of the TMC report is equal to the Renewal (RE) due month.
- The Transitional Medi-Cal Quarterly Status Report status is 'Reviewed – Ready to Run EDBC'.
- The EDBC benefit month is the same as the RE Due Month or, if the RE Due Month is in the past, then the EDBC benefit month is the month following the RE Due Month.

If the household has a renewal packet and EDBC is ran with 'RE' Run Reason, then the System auto sets the EDBC Run Reason to TMC 176 S/RE. When EDBC is ran with this run reason, in addition to the TMC report being updated to complete, the Renewal date is advanced.

**Note:** TMC 176 S and TMC 176 S/RE do not display as a Run Reason on the Run EDBC page.

The system generates a renewal packet for households where all individuals are on TMC and the end of the TMC period is equal to the RE due month.

With CA-214393, CalSAWS batch EDBC sweep (PB00E425), "Discontinue MC Cases for Non-Receipt of Completed MC 176 TMC" was turned off for all counties effective 03/17/2020. The criterion for the batch was to identify Medi-Cal programs which met one of the following conditions:

1. A Time Track type code of "Transitional Medi-Cal" with the Time Track Begin Date equal to eleven (11) months from the current batch month.
2. A Time Track type code of "Transitional Medical" with the Time Track Begin Date equal to seven (7) months from the current batch month, and a Customer Reporting Type as "TMC Quarterly Report" with a due date on the month before the batch month, and with a most recent customer reporting status of "SENT", "INCOMPLETE" or "ERROR".
3. A Time Track type code of "Transitional Medi-Cal" with the Time Track begin date equal to five (5) months from the current batch month, and a Customer

Reporting Type as "TMC Quarterly Report" with a due date on 2 months before the batch month, and with a most recent customer reporting status of "SENT", "INCOMPLETE" or "ERROR".

Note: PB00E425 triggered a regular EDBC in All Programs mode, identified and discontinued programs based on their "Transitional Medi-Cal Begin Date", "Customer Reporting Type", and "Customer Reporting Status" without checking the current aid code of the individual being processed.

If there were multiple program blocks and the RE Due Date did not align, then the pre-EDBC skips would kick-in.

The existing income calculations across all Medi-Cal programs excludes income that was used to determine CalWORKs benefits.

In the Negative Action Detail and MAGI Determination List pages the 'TMC Report Not Recvd' and 'TMC Report Incomplete' Negative Action Reasons are only available at program-level.

These reasons only display if all individuals are selected on the pages at which point a Negative Action ('MC Close Program' (CT73)) is triggered at the program-level.

Code	Negative Action Reason	MC Close Program
<b>CG</b>	TMC Report Not Recvd	Y
<b>CH</b>	TMC Report Incomplete	Y

Prior to discontinuance, when a Negative Action EDBC is run, a rule set (\_500CloseProgram) checks for the following exemptions:

1. The individual is a person who is identified as a child.
2. The individual is pregnant or within the 12-month post-partum period.

Currently, these individuals could remain eligible even if the TMC Report is not received or is incomplete.

CalSAWS sends person-level transactions through the MEDS interface to the MEDS system.

The TMC report is listed as 'TMC 176 S' instead of 'MC 176 TMC' on the Customer Reporting List and Detail pages.

The Customer Reporting Progress Report and the Customer Reporting Progress Detail report refers to the TMC report as 'TMC 176 S'.

## 1.2 Requests

DHCS confirmed that individuals will not be reevaluated through the full MC Hierarchy when they do not return their Transitional Medi-Cal Quarterly Status Report. These individuals must be discontinued.

Additionally, for households wherein all individuals are TMC, and the renewal due month is the last month of the TMC Period, the Renewal Packet for the household should not be sent out.

Any income that has been counted to determine CalWORKs benefits, should still be included in the budget to determine eligibility for any of the Medi-Cal programs.

The criteria used to determine when a TMC Status report needs to be updated to 'Complete – EDBC Accepted' should be updated.

The TMC Status Report is listed in the Customer Reporting List and Detail pages as 'TMC 176 S' but should be updated to 'MC 176 TMC'.

All references of 'TMC 176 S' on the Customer Reporting Progress Report and the Customer Reporting Progress Detail Report should be updated to 'MC 176 TMC'.

The Medi-Cal EDBC rules should allow person-level discontinuance for the reasons of 'TMC Report Not Recvd' and 'TMC Report Incomplete'.

## 1.3 Overview of Recommendations

1. Update the Medi-Cal EDBC rules to display the 'MC 176 TMC' Run Reason in the drop down when there is a Transitional Medi-Cal Quarterly Status Report with Status 'Reviewed – Ready to Run EDBC'.
  - a. Update the Medi-Cal EDBC rules to mark the 'MC 176 TMC' record as 'Complete – EDBC Accepted' on the Customer Reporting page when EDBC is run with 'MC 176 TMC' Run Reason and the EDBC is a Regular EDBC Accepted and Saved.
2. Update batch EDBC sweep (PB00E425) criteria for the TMC months being targeted, check the TMC aid codes, lookup TMC report status of "Sent", and trigger individual negative action EDBC.
3. Update the renewal packet logic so that there is no renewal packet sent to households where all individuals are active on TMC, and the renewal due month is equal to the last month of the TMC period.
4. Update MC 176 TMC to display correctly on the Customer Reporting pages.
5. Update the income calculation so that income previously counted in the CalWORKs budget is counted in the budget for all Medi-Cal programs.
6. Update MC 176 TMC to display correctly on the Customer Reporting Progress Report and the Customer Reporting Progress Detail Report.
7. Update the Negative Action Detail and MAGI Determination List page logic and the Medi-Cal EDBC rules to allow discontinuance, at the person-level for the reasons of 'TMC Report Not Recvd' and 'TMC Report Incomplete'.
8. Regression test MEDS EW40 transaction.

## 1.4 Assumptions

1. There are no updates to the verbiage on the MC 176 TMC report, variable population, or generation conditions.
2. All existing functionalities will remain unchanged unless called out as part of the design.
3. There are no other changes to the packet generation conditions or variable population logic, unless otherwise stated in this design document.
4. The existing code detail record will be updated to display the new MC 176 TMC rather than creating a new one.
5. The existing code does not map aid code 39 or 3T to any Medi-Cal RE packet; meaning that in cases where all individuals are active on these aid codes, they already do not receive any renewal packet.
6. There is no change to the existing MEDS interface.
7. As per the existing logic, individuals who are in protected groups will continue to be protected if they are discontinued from TMC.
8. The Medi-Cal EDBC rules set the 'MC 176 TMC' or 'MC 176 TMC/RE' Customer Reporting record as 'Complete – EDBC Accepted' when Medi-Cal EDBC is run with 'MC 176 TMC' or 'MC 176 TMC/RE' Run Reason and the EDBC is authorized as a Regular EDBC Accepted and Saved.
9. When an individual is discontinued, and the ongoing case has a negative action code of "TMC Report Not Received" or "TMC Report Incomplete," termination NOAs will be generated.

## 2 RECOMMENDATIONS

### 2.1 Run EDBC Page

#### 2.1.1 Overview

---

The Run EDBC page will include the Run Reason of 'MC 176 TMC' when the Transitional Medi-Cal Quarterly Status Report Status is 'Reviewed – Ready to Run EDBC'. The page will change in that this will be an option to select as the Run Reason for Medi-Cal on the Run EDBC page as shown in the mockup below.

#### 2.1.2 Run EDBC Mockup

---

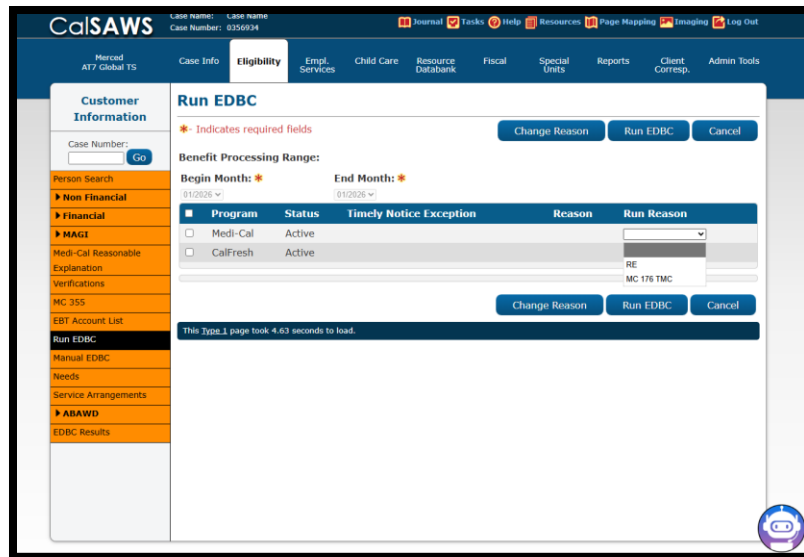


Figure 1 - Run Reason 'MC TMC 176' drop down

### 2.1.3 Description of Changes

1. Update the EDBC Run Reason from 'TMC 176 S' to 'MC 176 TMC' (CT744\_TM).
  - a. Display the Run Reason 'MC 176 TMC' as an option on the Run EDBC page drop list based on the following criteria:
    - i. The selected program is Medi-Cal.
    - ii. At least one individual is active on TMC aid code 39, 3T, 59, or 5T.
    - iii. Transitional Medi-Cal Quarterly Status report has a status of 'Reviewed – Ready to Run EDBC'.
    - iv. The MC 176 TMC report submit month is within the most recent TMC time track period.
    - v. The Benefit Month is on or after the TMC report submit month.

**Note:** The EDBC Run Reason will be auto set if all the above criteria are met.

### 2.1.4 Page Location

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

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

N/A

## 2.1.7 Accessibility

N/A

## 2.1.8 Page Usage/Data Volume Impacts

No change

## 2.2 Customer Reporting List Page

### 2.2.1 Overview

The Customer Reporting List page will display "MC 176 TMC" instead of "TMC 176 S" in the Type column when referring to the Transitional Medi-Cal Quarterly Status Report to match the official name which will be updated across CalSAWS (CT329\_TM).

### 2.2.2 Customer Reporting List Mockup

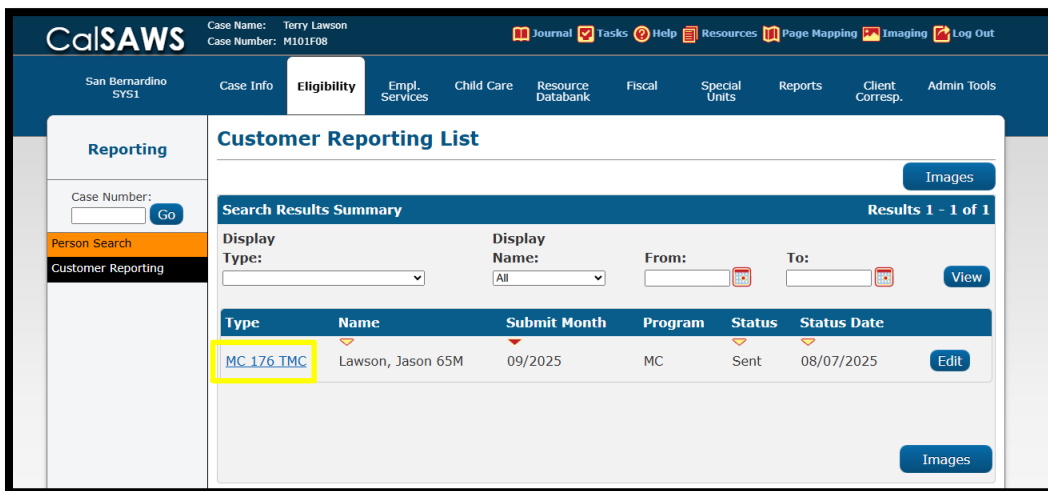


Figure 2 – Type 'MC 176 TMC'

### 2.2.3 Description of Changes

1. Update 'Type' column on the Customer Reporting List page as follows:
  - a. If the Type is Transitional Medi-Cal Quarterly Status Report, then display 'MC 176 TMC' (CT329\_TM).

### 2.2.4 Page Location – Customer Reporting List

- **Global:** Eligibility
- **Local:** Person Search
- **Task:** Search Results Summary

### 2.2.5 Security Updates

None

## 2.2.6 Page Mapping

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N/A

## 2.2.7 Accessibility

---

N/A

## 2.2.8 Page Usage/Data Volume Impacts

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No change

## 2.3 Customer Reporting Detail Page

### 2.3.1 Overview

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The Customer Reporting Detail page will display “MC 176 TMC” instead of “TMC 176 S” in the County Redetermination of Eligibility section when referring to the Transitional Medi-Cal Quarterly Status Report to match the official name which will be updated across CalSAWS.

### 2.3.2 Customer Reporting Detail Mockup

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County Redetermination of Eligibility		This Report
1.	For the MC 176 TMC report, did the customer check a box "yes" but not answer the rest of the questions? *	- Select - v
2.	For the MC 176 TMC report, did the customer turn in all required verifications? *	- Select - v
3.	Did all necessary parties sign the MC 176 TMC Report? * Who signed? <input type="text"/>	- Select - v
4.	Was the MC 176 TMC report dated? *	- Select - v
5.	Was the MC 176 TMC report signed and dated in the correct month? *	- Select - v
6.	Was information reported earlier missing from this MC 176 TMC report? *	- Select - v
7.	Does the information on this MC 176 TMC, alone or combined with the information from previously submitted MC 176 TMC for this submit month, equal a complete and correct MC 176 TMC? *	- Select - v

Figure 3 - Questions under 'County Redetermination of Eligibility' section on Customer Reporting Detail Page

### 2.3.3 Description of Changes

---

1. Update all questions under 'County Redetermination of Eligibility' on the Customer Reporting Detail page as follows:
  - a. Replace 'TMC 176 S' with 'MC 176 TMC'.

## 2.3.4 Page Location – Customer Reporting List

- **Global:** Eligibility
- **Local:** Person Search
- **Task:** Search Results Summary

## 2.3.5 Security Updates

None

## 2.3.6 Page Mapping

Update Comment Description for County Completeness Determination field.

## 2.3.7 Accessibility

N/A

## 2.3.8 Page Usage/Data Volume Impacts

No change

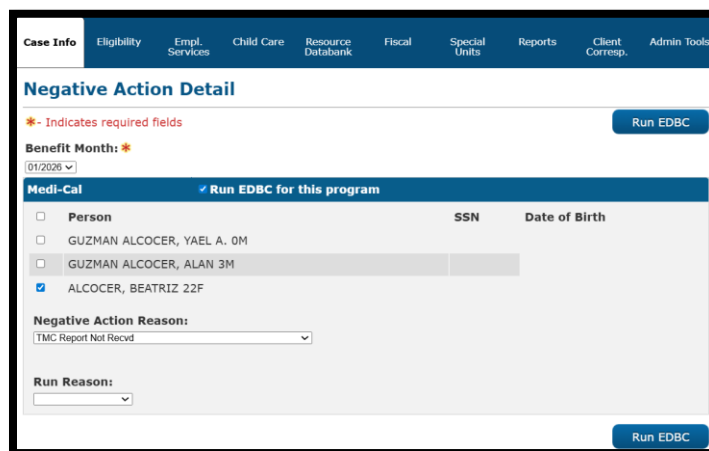
# 2.4 Person-Level Negative Action Reasons on Negative Action Detail and MAGI Determination List Pages

## 2.4.1 Overview

The 'Negative Action Reason' on the Negative Action Detail and MAGI Determination List pages must run at the person-level and the online logic must be at person-level for the following reasons:

- a. 'TMC Report Not Recvd'
- b. 'TMC Report Incomplete'

## 2.4.2 Negative Action Reasons Mockup



The screenshot shows a web application interface for 'Negative Action Detail'. At the top, there is a navigation bar with tabs: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. Below the navigation bar, the page title is 'Negative Action Detail'. A red asterisk icon indicates required fields. The 'Benefit Month' is set to '01/2026'. Below this, there is a section for 'Medi-Cal' with a 'Run EDBC for this program' button. A table lists three individuals: GUZMAN ALCOECER, Yael A. 0M; GUZMAN ALCOECER, ALAN 3M; and ALCOECER, BEATRIZ 22F. The third individual is selected. Below the table, there is a 'Negative Action Reason' dropdown menu with 'TMC Report Not Recvd' selected. At the bottom, there is a 'Run Reason' dropdown menu and a 'Run EDBC' button.

Figure 4 – Negative Action Reason dropdown on Negative Action Detail Page, 1

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

### Negative Action Detail

\*- Indicates required fields Run EDBC

Benefit Month: \*  
01/2026

**Medi-Cal** Run EDBC for this program

<input type="checkbox"/>	Person	SSN	Date of Birth
<input type="checkbox"/>	GUZMAN ALCOCER, Yael A. 0M		
<input type="checkbox"/>	GUZMAN ALCOCER, ALAN 3M		
<input checked="" type="checkbox"/>	ALCOCER, BEATRIZ 22F		

Negative Action Reason:  
TMC Report Incomplete

Run Reason:  
[ ]

Run EDBC

Figure 5 – Negative Action Reason dropdown on Negative Action Detail Page, 2

### MAGI Determination List

\*- Indicates required fields

**Request MAGI Determination**

Begin Month: \* 01/2026 End Month: \* 01/2026

Program Identifier: \*  
Medi-Cal

Life Change Event:  
[ ]

Bypass Primary Contact Matching Criteria

Request Lift Options

Request Negative Action Determination

**Select Negative Action Person(s)**

<input type="checkbox"/>	Person	SSN	Date of Birth
<input type="checkbox"/>	Yael Guzman Alcocer		
<input checked="" type="checkbox"/>	ALAN GUZMAN ALCOCER		
<input type="checkbox"/>	BEATRIZ ALCOCER		

Negative Action Reason: \*  
TMC Report Incomplete

Restart VLP e-Verification

Figure 6 – Negative Action Reason dropdown on MAGI Determination List Page, 1

**MAGI Determination List**

\*- Indicates required fields

**Request MAGI Determination**

Begin Month: \* 01/2026 End Month: \* 01/2026

Program Identifier: \* Medi-Cal

Life Change Event:

Bypass Primary Contact Matching Criteria

Request Lift Options

Request Negative Action Determination

**Select Negative Action Person(s)**

Person	SSN	Date of Birth
<input type="checkbox"/> Yael Guzman Alcocer		
<input checked="" type="checkbox"/> Alan Guzman Alcocer		
<input type="checkbox"/> Beatriz Alcocer		

Negative Action Reason: \* TMC Report Not Recvd

Restart VLP e-Verification

Figure 7 – Negative Action Reason dropdown on MAGI Determination List Page, 2

### 2.4.3 Description of Changes

1. Update the Negative Action Reason dropdown option for the Negative Action Detail and MAGI Determination List page to allow for person-level selection for the following Reasons:
  - a. 'TMC Report Not Recvd' (CT73\_CG)
  - b. 'TMC Report Incomplete' (CT73\_CH)

### 2.4.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Negative Action Detail
  
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility List

### 2.4.5 Security Updates

N/A

### 2.4.6 Page Mapping

N/A

### 2.4.7 Accessibility

N/A

## 2.4.8 Page Usage/Data Volume Impacts

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No change

## 2.5 Medi-Cal Eligibility Rules Updates

### 2.5.1 Overview

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Update the criteria used in the Medi-Cal EDBC Rules to auto set 'MC 176 TMC' or 'MC 176 TMC/RE' run reason and use the updated criteria to also display the 'MC 176 TMC' run reason on the Run EDBC page.

Update the income calculation so that income previously counted in the CalWORKs budget is counted in the budget for all Medi-Cal programs.

Update the Medi-Cal EDBC rules to discontinue TMC at the person-level for the reasons of 'TMC Report Not Recvd' (CT73\_CG) and 'TMC Report Incomplete (CT73\_CH).

### 2.5.2 Description of Changes

---

1. Update the EDBC Run Reason 'MC 176 TMC' to auto set and display on the Run EDBC page with the criteria defined in section 2.1.3.1.
2. Update the EDBC Run Reason from 'TMC 176 S/RE' to 'MC 176 TMC/RE' (CT744\_TR).
  - a. Update the EDBC Run Reason 'MC 176 TMC/RE' to auto set based on the following criteria:
    - i. The selected program is Medi-Cal.
    - ii. At least one individual is active on TMC aid code 39, 3T, 59, or 5T.
    - iii. Transitional Medi-Cal Quarterly Status report has a status of 'Reviewed – Ready to Run EDBC'.
    - iv. The MC 176 TMC report submit month is within the most recent TMC time track period.
    - v. The Benefit Month is on or after the TMC report submit month.
    - vi. Run Reason is set to RE.

**Note:** The Run Reason 'MC 176 TMC/RE' will not be displayed as an option on the Run EDBC page. Per existing design, if EDBC is run with the auto set reason of 'MC 176 TMC/RE', in addition to the TMC report being updated to complete, the Renewal date is also advanced.
3. Update the income calculation so that income previously counted in the CalWORKs budget is counted in the budget for all Medi-Cal programs.
  - a. Inactivate the income rule for Medi-Cal (\_500IncomeUsedInCW) to no longer exempt a person's income that was used in a passed CW budget.
4. Update the Medi-Cal EDBC rules to discontinue TMC at the person-level for the reasons of 'TMC Report Not Recvd' (CT73\_CG) and 'TMC Report Incomplete (CT73\_CH).
  - a. Update the MC Close Person Value to 'Y'
  - b. Update the MC Close Program to '(null)'

### 2.5.3 Programs Impacted

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Medi-Cal

### 2.5.4 Performance Impacts

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N/A

## 2.6 'Discontinue Medi-Cal for Non-Receipt of MC 176 TMC' (Batch PB00E425)

### 2.6.1 Overview

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This SCR will update an existing Batch EDBC sweep job, 'Discontinue Medi-Cal for Non-Receipt of MC 176 TMC' (PB00E425) to run a negative action EDBC for the TMC individuals when the Transitional Medi-Cal Quarterly Status Report is not returned. For the changes to this batch to be effective, PB00E425 will also need to be switched on, as it was off from 03/17/2020.

### 2.6.2 Description of Change

---

1. Create a Batch Schedule Change Request (BSCR) to turn on PB00E425 EDBC sweep.
2. Create a Batch Property Change Request (BPCR) to opt-in All Counties to PB00E425 EDBC sweep.
3. Update existing 'Discontinue Medi-Cal for Non-Receipt of MC 176 TMC' Batch EDBC sweep job (PB00E425) to identify Medi-Cal programs that meet the criteria in either a, b, or c.
  - a. **End of Initial TMC**
    - i. The individual is an Active MEM on a Medi-Cal program on aid code 39 or 3T, and
    - ii. There is a 'TMC/Four Month Continuing Eligibility Period Detail' page with a record for Type "TMC" with the Begin Month equal to five (5) months prior to the batch month, and End Month is after the batch month, and
    - iii. There is a Customer Reporting Type as "MC 176 TMC" with Submit Month equal to 2 months before the batch run date, and the Customer Reporting Status is 'Sent'.
      1. **For Example:**
      2. Batch Run Date = June 17, 2025
      3. TMC Begin Month = January 2025
      4. Transitional Medi-Cal Quarterly Status Report Submit Month – April 2025 with Status of 'SENT'.
      5. At least one individual is Active MEM on 39 or 3T.
    6. *The Medi-Cal program would be identified to trigger EDBC with a negative action for the TMC individuals for the July 2025 benefit month.*

**b. First Month of Continuing TMC/7<sup>th</sup> Month of TMC**

- i. The individual is an Active MEM on a Medi-Cal program on Aid Code 39, 3T, 59, or 5T, and
- ii. There is a 'TMC/Four Month Continuing Eligibility Period Detail' page with a record for Type "TMC" with the Begin Month equal to seven (7) months prior to the Batch Month, and End Month is after the batch month, and
- iii. There is a Customer Reporting Type as "MC 176 TMC" with Submit Month equal to one (1) month before the batch run date, and the Customer Reporting Status is 'SENT'.

**1. For Example:**

- 2. Batch Run Date = June 17, 2025
- 3. TMC Begin Month = November 2024
- 4. Transitional Medi-Cal Quarterly Status Report Submit Month – May 2025 with Status of 'SENT'.
- 5. At least one individual is Active MEM on 39, 3T, 59, or 5T.
- 6. *The Medi-Cal program would be identified to trigger EDBC with a negative action for the individuals for the July 2025 benefit month.*

**c. Last Months of Continuing TMC/10<sup>th</sup> month of TMC**

- i. The individual is an Active MEM on a Medi-Cal program on aid code 39, 3T, 59, or 5T, and
- ii. There is a 'TMC/Four Month Continuing Eligibility Period Detail' page with a record for Type "TMC" with Begin Month equal to ten (10) months prior to the Batch Month, and End Month is after the batch month, and
- iii. There is a Customer Reporting Type as "MC 176 TMC" with Submit Month equal to one month before the batch run date, and the Customer Reporting Status is 'SENT'.

**1. For Example:**

- 2. Batch Run Date = June 17, 2025
- 3. TMC Begin Month = August 2024
- 4. Transitional Medi-Cal Quarterly Status Report Submit Month – May 2025 with Status of 'SENT'.
- 5. At least one individual is Active MEM on 39, 3T, 59, 5T.
- 6. *The Medi-Cal program would be identified to trigger EDBC with a negative action for the TMC individuals for the July 2025 benefit month.*

- 4. Create a Codes Table Change Request (CTCR) to rename PB00E425 batch description to 'Individual(s) discontinued for failure to submit MC 176 TMC Status Report' (CT942\_TM).
- 5. Insert the identified individuals in Recommendation 2.6.2.3 into SYS\_TRANSACT and TRANS\_PERS for Batch EDBC Processing with the following values:

SYS_TRANSACT	Value
TYPE_CODE	BE

CASE_ID	Active Medi-Cal case where the participant is on TMC.
PGM_ID	Active Medi-Cal program of the TMC participant.
EFF_DATE	First of the month following the batch run date
RUN_RSN_CODE	N/A
SUB_TYPE_CODE	CT942_TM value for 'Individual(s) discontinued for failure to submit MC 176 TMC Status Report'
RUN_TYPE_CODE	SP – Single Program

TRANS_PERS	Value
PERS_ID	The Active MC individuals on TMC aid codes.
STAT_RSN_CODE	CT73_CG_TMC Report Not Recvd  Applies only the specified PERS_IDs

- i. Individual(s) discontinued for failure to submit MC 176 TMC Status Report
6. Standard Batch EDBC journal Entry.

Journal Entry: Individual(s) discontinued for failure to submit MC 176 TMC Status Report	
New/Update	New
Long Description	Batch EDBC ran for {Benefit Month}. Batch EDBC processed for the {Program Code} program for following reasons: {Processed Reasons}
Short Description	Batch EDBC ran for {Benefit Month}.
Journal Category	Eligibility
Journal Type	Batch EDBC

### 2.6.3 Execution Frequency

Monthly – One day prior to Batch 10-day cutoff.

### 2.6.4 Key Scheduling Dependencies

After Batch EDBC Processing job completes (PB00E103). This will stage the case for Batch EDBC processing on Batch 10-day itself.

### 2.6.5 Counties Impacted

---

All Counties

### 2.6.6 Category

---

Core

### 2.6.7 Data Volume/Performance

---

Estimated 3,000 cases monthly for all counties.

### 2.6.8 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.).

## 2.7 MEDS Transaction EW40

### 2.7.1 Overview

---

As EDBC changes are modified to person-level discontinuance, EW40 MEDS transaction must be regression tested manually.

### 2.7.2 Description of Change

---

1. MEDS transactions must be regression tested manually to validate corresponding person-level discontinuance transactions are being triggered.
  - a. EW40- Eligibility Discontinuance transaction.

### 2.7.3 Partner Integration Testing

---

No PIT is needed.

### 2.7.4 Execution Frequency

---

No change

### 2.7.5 Key Scheduling Dependencies

---

No change

### 2.7.6 Counties Impacted

---

All CalSAWS counties

### 2.7.7 Category

---

Core-Non prime

### 2.7.8 Data Volume/Performance

---

No impact

### 2.7.9 Interface Partner

---

MEDS

### 2.8.0 Failure Procedure/Operational Instructions

---

N/A

## 2.8 EHIT – No Impact

## 2.9 Non-MAGI RE Packet Sweep Job

### 2.9.1 Overview

---

The existing Non-MAGI RE Packet batch job (PB00R608) finds Non-MAGI only cases that have an RE due in two months and sends a packet. Update the existing Non-MAGI RE Packet batch job to exclude a program from receiving a packet if all active members are on TMC and the renewal due month is equal to the last month of the TMC period.

### 2.9.2 Description of Change

---

Update the Non-MAGI RE Packet Sweep Job to exclude a program from receiving a packet if all Active Mem are on a TMC aid code and the renewal due month is equal to the last month of the TMC period.

**Technical Note:** The TMC aid codes are 39, 3T, 59, 5T

### 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 Failure Procedure/Operational Instructions

---

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action

## 2.10 Customer Reporting Progress Report

### 2.10.1 Overview

The Customer Reporting Progress Report provides detailed information of SAR 7, MC 176 TMC, QR 7 and RE Packets by status for a specified benefit month and organization

### 2.10.2 Customer Reporting Progress Report Mockup

Type	Worker Id	Generated	Error	Sent	Received	Incomplete	Not Applicable	Reviewed - Ready to Run EDBC	Complete - EDBC Accepted	% of Reports Completed
Totals		27667	0	27979	7079	1237	3753	1785	291	-

Figure 8 – Customer Reporting Progress Report

### 2.10.3 Description of Change

1. Update the Customer Report Progress Report to replace all references of TMC 176 S to MC 176 TMC. This includes the TMC 176 S sheet name, the TMC 176 S tab name on all sheets, the TMC 176 S value under the Type column within the TMC 176 S sheet, the TMC 176 S reference in the Summary table, and the TMC 176 S table name within the TMC 176 S sheet.

Summary	Generated	Error	Sent	Received	Incomplete	Not Applicable	Reviewed - Ready to Run EDBC	Completed - EDBC Accepted
Total	3,732,227	60	3,884,479	2,263,027	192,012	92,960	45,878	1,666,279
MC 176 TMC	27,667	0	27,979	7,079	1,237	3,753	1,785	291
Other Categories	3,704,560	60	3,856,500	2,255,948	190,775	89,207	44,093	1,665,988

Figure 9 – Customer Reporting Progress Report, 1

Worker Id	Generated	Error	Sent	Received	Incomplete	Not Applicable	Reviewed - Ready to Run EDBC	Complete - EDBC Accepted	% of Reports Completed
Totals	27697	0	27979	7979	1237	3753	1785	291	-

Figure 10 – Customer Reporting Progress Report, 2

- Update the report description as follows:  
Provides the number of SAR 7, MC 176 TMC, QR 7 and RE Packets by status for a specified benefit month and organization  
**Note:** This change is reflected in the Reports > On Request > Administrative Report Search page.

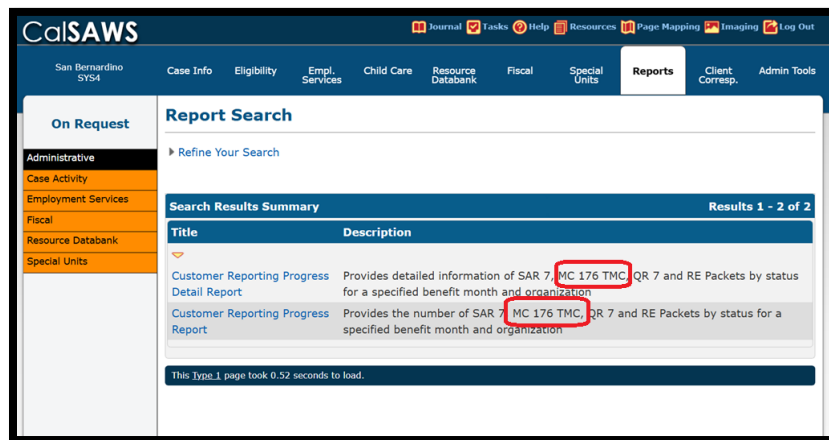


Figure 11 – Report Search

## 2.10.4 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: Administrative**

## 2.10.5 Counties Impacted

All counties are impacted by the change outlined in this section.

## 2.10.6 Security Updates

No updates will be made to the report's existing security.

## 2.10.7 Report Usage/Performance

The change outlined in this section will not impact on the report's performance.

## 2.11 Customer Reporting Progress Detail Report

### 2.11.1 Overview

The Customer Reporting Progress Detail Report provides detailed information of SAR 7, MC 176 TMC, QR 7 and RE Packets by status for a specified benefit month and organization

### 2.11.2 Customer Reporting Progress Detail Report Mockup

Type	Worker Id	Generated	Error	Sent	Received	Incomplete	Not Applicable	Reviewed - Ready to Run EDBC	Complete - EDBC Accepted	% of Reports Completed
<b>Totals</b>		27667	0	27979	7079	1237	3753	1785	291	

Figure 12 – Customer Reporting Progress Detail Report

### 2.11.3 Description of Change

1. Update the Customer Report Progress Detail Report to replace all references of TMC 176 S to MC 176 TMC. This includes the 'SAR 7 & TMC 176 S & QR (GA/GR)' sheet name, the 'SAR 7 & TMC 176 S & QR (GA/GR)' tab name on all sheets, the TMC 176 S value under the Type column within the 'SAR 7 & TMC 176 S & QR (GA/GR)' sheet, and the TMC 176 S reference in the Summary table.

Summary	Distinct Generated	Distinct Error	Distinct Sent	Distinct Received	Distinct Incomplete	Distinct Not Applicable	Distinct Reviewed - Ready To Run EDBC	Distinct Complete - EDBC Accepted
<b>Total</b>	25,800	0	25,857	16,204	797	139	456	9,871
MAGI RE Packet	9,252	0	9,277	4,761	255	48	270	2,896
SAR 7 (CF)	6,061	0	6,072	3,845	301	38	58	2,448
CF RE Packet	5,023	0	5,029	4,000	137	18	21	3,687
Non-MAGI RE Packet	3,155	0	3,155	2,293	45	18	68	1,129
OW/CF RE Packet	677	0	679	568	25	0	6	511
SAR 7 (CW)	518	0	522	458	17	3	9	398
Mixed Household RE Packet	318	0	318	243	12	2	15	118
OW RE Packet	155	0	154	119	5	2	0	108
<b>MC 176 TMC</b>	24	0	24	4	0	2	0	0
SAR 7	15	0	15	13	0	0	0	2
Former Foster Youth Packet	12	0	12	0	0	0	0	0

Figure 13 – Customer Reporting Progress Detail Report, 1

Total Distinct								
Generated	Error	Sent	Received	Incomplete	Not Applicable	Reviewed Ready To Run EDIBC	Completed	% Completed
33,827	0	34,162	18,378	1,963	5,853	2,868	478	45

Total								
Generated	Error	Sent	Received	Incomplete	Not Applicable	Reviewed Ready To Run EDIBC	Completed	% Completed
43,433	0	44,098	11,888	2,125	6,747	3,320	586	44

Type	Worker Id	Case Number	Program	Generated Date	Error Date	Sent Date	Received Date	Incomplete Date	Not Applicable Date	Reviewed - RR EDIBC Date	Complete - EDIBC Accepted Date	Status	Qlik ID
MC 176 TMC			MC	05/22/2025		05/22/2025						Sent	523829

**Figure 14 – Customer Reporting Progress Detail Report, 2**

2. Update the report description as follows:  
 Provides detailed information of SAR 7, MC 176 TMC, QR 7 and RE Packets by status for a specified benefit month and organization  
**Note:** This change is reflected in the Reports > On Request > Administrative Report Search page.

Title	Description
Customer Reporting Progress Detail Report	Provides detailed information of SAR 7, MC 176 TMC, QR 7 and RE Packets by status for a specified benefit month and organization
Customer Reporting Progress Report	Provides the number of SAR 7, MC 176 TMC, QR 7 and RE Packets by status for a specified benefit month and organization

**Figure 15 – Report Search**

### 2.11.4 Report Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Administrative

### 2.11.5 Counties Impacted

All counties are impacted by the change outlined in this section.

### 2.11.6 Security Updates

No updates will be made to the report's existing security.

### 2.11.7 Report Usage/Performance

The change outlined in this section will not impact on the report's performance.

### 2.12 Data Warehouse Name – No Impact

### 2.13 Data Change – No Impact

### 2.14 Automated Regression Test – No Impact

## 3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION
1	Batch EDBC Sweep	PB00E425 Batch EDBC Sweep TMC timeline when negative action will be triggered

## 4 OUTREACH

N/A

## 5 APPENDIX

N/A