

CalSAWS

California Statewide Automated Welfare System



Design

CA-265571

LTC/HCBS SI Provision Other than the Standard
Allocation Amount

DOCUMENT APPROVAL HISTORY

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| DATE | VERSION | REVISION DESCRIPTION | AUTHOR | |
| 11/26/2025 | 1.0 | Baseline Design | Pooja Jadhav | |
| 1/23/2026 | 1.1 | Design updated based on requirement confirmations and changes to requests | Pooja Jadhav | |
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| 2/6/2026 | 1.4 | Updated section 2.2 to include a new soft validation on the Expense Amount Detail page. Added section 2.3 to update the EDBC Person Line Item Detail – Allocation and Other Deductions page to display a read-only value/ remove the hyperlink when the user has entered a non-standard allocation. Updated section 2.4.2.1 with a note referencing the newly added mockup in section 2.3 and removed figure 6. | Pooja Jadhav | |

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CA-265571 – LTC/HCBS SI Provision Other than the Standard Allocation Amount

1 OVERVIEW

The Minimum Monthly Maintenance Needs Allowance (MMMNA) is the standard amount of income used to determine the spousal income allocation to the community spouse from the Home and Community-Based Services (HCBS) waiver spouse or Long-Term (LTC) Care spouse. The standard MMMNA amount is determined each year by the federal government and reported to counties via an ACWDL. Per MEDIL I 22-08 the standard MMMNA amount should be used when calculating the spousal income allocation, unless a state fair hearing or court order has established a higher (non-standard) amount to be used.

The purpose of this SCR is to allow for an allocation other than the standard income allocation amount to be used in a budget calculation. Per ACWDL 17-25, the couple is permitted to adjust the amount in whatever manner they determine is best in order to preserve the eligibility for each spouse.

1.1 Current Design

Currently, the standard MMMNA is displayed on the Long Term Care (LTC)/ HCBS-Waiver/Board and Care (B&C) Allocation Detail Page using the following fields:

- MNIL for Spouse/Children at Home (other than Excluded Children)
- Community Spouse MNIL

Effective 01/01/2025 with CA-284973, the MMMNA (standard allocation amount) for LTC/HCBS Community Spouse Needs allocation is \$3,948.

Long Term Care (LTC)/HCBS-Waiver/Board and Care (B&C) Allocation Detail

Close

Allocation from B&C Person to Spouse/Children at Home, or from LTC/HCBS-Waiver Person with No Community Spouse to Children at Home

| | | |
|---|----|-------------|
| Unit Size | | 1 |
| MNIL for Spouse/Children at Home (other than Excluded Children) | \$ | 3,948.00 |
| Total Net Nonexempt Income of Spouse/Non-Excluded Children | - | <u>0.00</u> |
| Unmet Needs of Spouse/Non-Excluded Children | = | 0.00 |
| Total Countable Income of LTC/HCBS-Waiver/B&C Person | \$ | <u>0.00</u> |
| Health Insurance for LTC/HCBS-Waiver/B&C Person | - | <u>0.00</u> |
| Total Net Nonexempt Income of LTC/HCBS-Waiver/B&C Person | = | 0.00 |
| MNIL for LTC/HCBS-Waiver/B&C Person | - | 0.00 |
| Amount Available for Allocation to Spouse/Children | = | 0.00 |
| Allocation to Spouse/Children | \$ | 0.00 |

Spousal Allocation to Community Spouse

| | | |
|--|----|-----------------|
| Community Spouse MNIL | \$ | 3,948.00 |
| Community Spouse Gross Income (Include Public Assistance) | - | <u>1,500.00</u> |
| Medicare Premiums paid by the Community Spouse | - | 0.00 |
| OHC Costs paid by the Community Spouse | - | 0.00 |
| Maximum Allocation to Community Spouse | = | 2,448.00 |
| Amount Actually Paid by the LTC/HCBS-Waiver Spouse to the Community Spouse | \$ | 1,439.14 |
| Actual Allocation to Community Spouse | \$ | 1,439.14 |

Figure 1 - LTC/HCBS-Waiver/B&C Allocation Detail Page – Standard Allocation

To apply an amount other than the standard income allocation for LTC/HCBS SI, an Eligibility Determination and Benefit Calculation (EDBC) override needs to be completed by users.

1.2 Requests

1. Add functionality to allow for a different allocation amount to be added other than the standard income amount.

1.3 Overview of Recommendations

1. Update the functionality to allow for a non-standard income allocation amount to be used in place of the standard income allocation amount for the LTC/HCBS Spousal Impoverishment (SI) determination from the Expense Detail Page.

- a. Add the Expense Category of 'Non-Standard Allocation - LTC/HCBS Waivers' to the drop list on the Expense Detail Page.
- b. Update the Expense Type field on the Expense Detail Page for when 'Non-Standard Allocation - LTC/HCBS Waivers' is selected as the Expense Category and add the Expense Type of 'Non-Standard Allocation - LTC/HCBS Waivers'.
- c. Add a new soft validation to the Expense Amount Detail page which displays when the Amount entered is greater than the standard allocation (CT 335_81).
- d. Update the existing EDBC Person Line Item Detail - Allocation and Other Deductions page when there is an amount with the type 'LTC/HCBS-Waiver/B&C Allocation Detail' to remove the hyperlink.
- e. Update the existing EDBC logic for income calculation to override the standard income amount with the worker-entered Non-Standard Allocation amount from the Expense Detail Page. This value will display on the EDBC Person Line Item Detail - Allocation and Other Deductions page with the type of 'LTC/HCBS-Waiver/B&C Allocation Detail' as a read-only amount with the hyperlink removed.

1.4 Assumptions

1. The Spousal Allocation to the Community Spouse calculation functionality will not change as part of this SCR. This includes the logic that allocated income is unearned income for the Community Spouse.

2 RECOMMENDATIONS

2.1 Expense List Page

2.1.1 Overview

This page will be used to select the new Expense Category of 'Non-Standard Allocation – LTC/HCBS Waivers'.

CalSAWS users may select the new Expense Category and be navigated to the Expense Detail Page where Non-Standard SI income allocations may be added.

2.1.2 Expense List Mockup

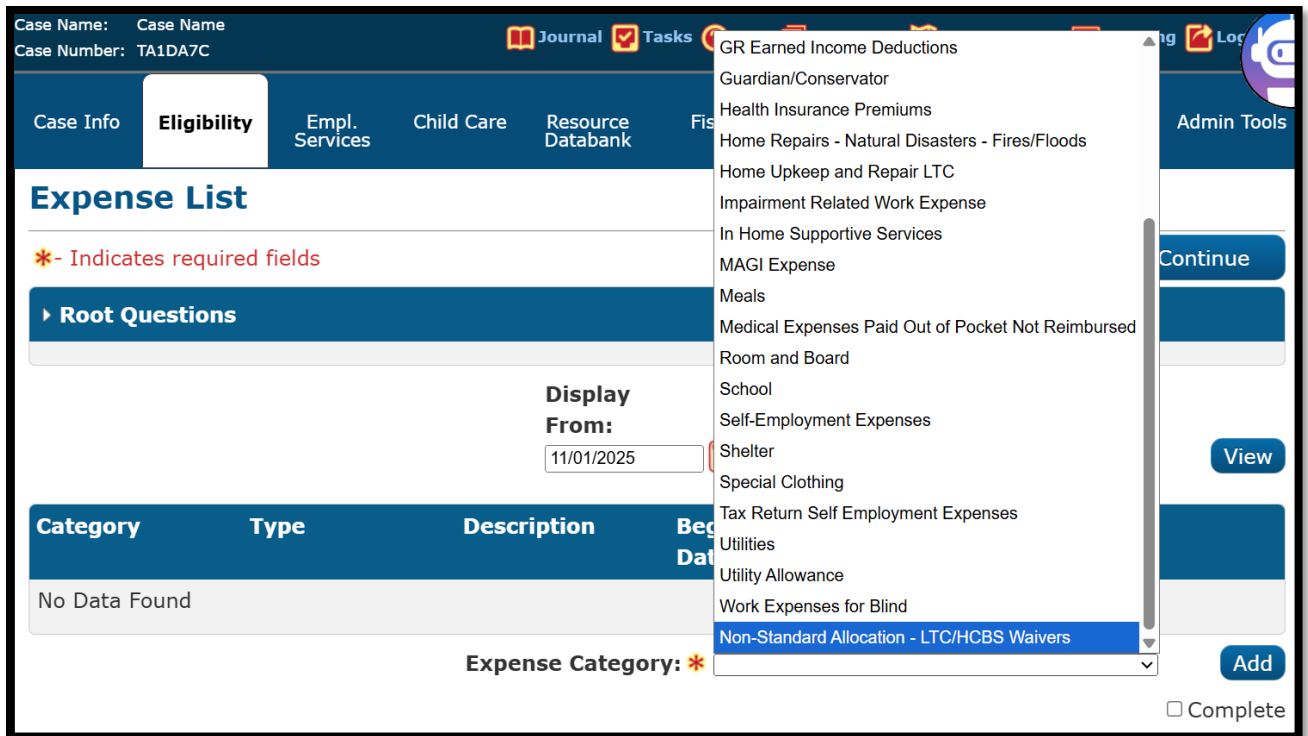


Figure 2 - Expense List – 'Non-Standard Allocation - LTC/HCBS Waivers' Expense Category Type added

2.1.3 Description of Changes

1. Add a new Expense Category drop list option on the Expense List page, 'Non-Standard Allocation – LTC/HCBS Waivers'.

2.1.4 Page Location

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

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 Expense Detail And Expense Amount Detail Pages

2.2.1 Overview

This page will be used to add amounts when the Expense Category selected on the Expense List Page is 'Non-Standard Allocation – LTC/HCBS Waivers'.

CalSAWS users may add or edit the Non-Standard Allocation amount using the section titled 'Amounts'. Data will be stored and utilized by the Medi-Cal EDBC Rules to determine the allocation. Additionally, if the Amount entered is greater than the non-standard allocation, then the page will display a soft validation.

2.2.2 Expense Detail Mockup

Expense Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Expense Category: *
Non-Standard Allocation - LTC/HCBS Waivers

Description:

Expense Type: *
Non-Standard Allocation - LTC/HCBS Waivers

Frequency: *
Monthly

Intent to Reduce Expense Amount:

Reduction Due Date:

Shared with RDP

Contributors *

| Persons | Begin Date | End Date |
|---------------|------------|----------|
| No Data Found | | |

Edit Add

Amounts

| Amount | Amount Paid by Others | Begin Date | End Date |
|-----------------------------------|-----------------------|------------|-------------------------------------|
| <input type="checkbox"/> 4,200.00 | 0.00 | 05/01/2026 | <input type="button" value="Edit"/> |

Save and Add Another Save and Return Cancel

Figure 3 - Expense Detail – Expense Category of 'Non-Standard Allocation – LTC/HCBS Waivers'

Expense Amount Detail

*- Indicates required fields

Save and Return Cancel

- Amount** - The Amount entered is higher than the standard amount \$3,948.00. To continue with this non-standard amount, click 'Save and Return'.

Change Reason

New Change Reason: * **New Reported Date: ***

Amount: * **Amount Paid by Others:**

Name of Others who Paid:

Begin Date: * **End Date:**

Verified: *

Save and Return Cancel

Figure 4 - Expense Amount Detail – Soft Validation

2.2.3 Description of Changes

1. Update the fields on the Expense Detail page for when 'Non-Standard Allocation - LTC/HCBS Waivers' is the selected 'Expense Category'.
 - a. The fields will be updated as follows:

| Field Name | Description |
|------------------|---|
| Expense Category | This field will display 'Non-Standard Allocation – LTC/HCBS Waivers' as selected by the user on the Expense List Page. This field will be read-only. |
| Expense Type | The drop list displays the following value: <ul style="list-style-type: none"> • Non-Standard Allocation – LTC/HCBS Waivers This field is mandatory. |

Note: This page includes the following existing sections and there are no changes: Shared with RDP, Contributors, and Amounts.

2. Add a new soft validation to the Expense Amount Detail page when the Expense Category and Expense type is 'Non-Standard Allocation – LTC/HCBS

Waivers' which displays when the Amount entered is greater than the standard allocation (CT 335_81) as follows:

- a. The Amount entered is higher than the standard amount [standard allocation value within the year of the Begin Date]. To continue with this non-standard amount, click 'Save and Return'.

Note: The Expense Category and Expense Type are newly created in section 2.2.

Note: The Begin Date is a mandatory field on the Expense Amount Detail page. However, if the Amount is entered without the Begin Date, the soft validation will not display. Instead, the user will first be directed to complete the mandatory Begin Date field. Once entered, if the Amount is greater than the standard allocation, then the soft validation will display.

Example:

- The Begin Date is 05/05/2025. The Amount entered is \$4200. The soft validation will read as follows:
 - Amount - The Amount entered is higher than the standard amount \$3,948.00. To continue with this non-standard amount, click 'Save and Return'.
- The Begin Date is 03/05/2026. The Amount entered is \$4200. The soft validation will read as follows:
 - Amount - The Amount entered is higher than the standard amount \$4,067.00. To continue with this non-standard amount, click 'Save and Return'.
- The Begin Date has not been entered. The Amount entered is \$4200. The soft validation will not display until the Begin Date is entered.

Note: With CA-296600, the 2026 standard allocation will be updated.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

N/A

2.2.8 Page Usage/Data Volume Impacts

No change

2.3 EDBC Person Line Item Detail – Allocation and Other Deductions

2.3.1 Overview

This page will display the non-standard allocation amount as read-only with the hyperlink removed.

2.3.2 EDBC Person Line Item Detail – Allocation and Other Deductions Mockup

| Name | Type | Description | Amount |
|-----------------|---------------------------------------|-------------|-------------|
| Duck, Daisy 75F | LTC/HCBS-Waiver/B&C Allocation Detail | | \$ 4,200.00 |
| Total | | | \$ 4,200.00 |

Figure 5 - EDBC Person Line Item Detail – Allocation and Other Deductions – Non-Standard Allocation

2.3.3 Description of Changes

- a. Update the existing EDBC Person Line Item Detail - Allocation and Other Deductions page when there is an amount with the type 'LTC/HCBS-Waiver/B&C Allocation Detail' to remove the hyperlink.
 - i. Apply the non-standard allocation when the Expense amount entered on the Expense Amount Detail page with the Expense Type of 'Non-Standard Allocation – LTC/HCBS Waivers' overlaps with the 1st day of the benefit month.

Note: This does not change the system behavior if there is no non-standard allocation entered by the user. Per existing logic, the standard allocation will display on the page as a hyperlink, navigating users to the Long Term Care (LTC)/HCBS-Waiver/Board and care (B&C) Allocation Detail page.

2.3.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information, Run EDBC
- **Task:** EDBC Person Line Item Detail – Allocation and Other Deductions

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

N/A

2.3.8 Page Usage/Data Volume Impacts

No change

2.4 Eligibility Rules Updates

2.4.1 Overview

The Medi-Cal Eligibility Rules will override the standard amount (CT 335_81) with the worker-entered Non-Standard Allocation amount from the Expense Detail Page to calculate income allocation.

2.4.2 Description of Changes

1. Update the EDBC logic for standard allocation calculation for LTC/HCBS Waivers so that the worker-entered value (Non-Standard Allocation) overrides the standard income allocation (CT 335_81) when calculating allocation amounts.

Note: This value is displayed to the workers on the EDBC Person Line Item Detail – Allocation and Other Deductions page as a read only value as shown in section 2.3.2 Figure 5.

Note: The same budget is utilized for calculating SI standard and non-standard allocations. Additionally, the rules will use the Non-Standard Allocation amount that overlaps with the first of the month.

Note: With this implementation, if there is a Non-Standard allocation entered on the Expense Amount Detail page, it will override and replace the standard income allocation value in EDBC income calculations.

- a. If the income calculation after applying the Non-Standard Allocation is a negative value, EDBC should automatically calculate the income calculation to be \$0.

Example:

Income after deductions was \$1000 and the Non-Standard Allocation is \$1700. After the allocation of \$1000 to the Community Spouse, EDBC will set the HCBS person's income to \$0 instead of -\$700.

2.4.3 Example Scenarios

N/A

2.4.4 Programs Impacted

Medi-Cal

2.4.5 Performance Impacts

N/A

2.5 Batch Name – No Impact

2.6 Interface Name – No Impact

2.7 eHIT – No Impact

2.8 Form/NOA Name – No Impact

2.9 Report Name – No Impact

2.10 Data Warehouse Name – No Impact

2.11 Data Change – No Impact

2.12 Automated Regression Test – No Impact

3 SUPPORTING DOCUMENTS

N/A

4 OUTREACH

N/A

5 APPENDIX

N/A