

CalSAWS

California Statewide Automated Welfare System



Design

CA-273037

Automate Discontinuance of Deceased Individuals in
a MAGI or Mixed/MAGI Case

DOCUMENT APPROVAL HISTORY

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2/5/2026	1.0	Initial Draft	Krystal Nicholas, Leah Weston
4/6/2026	1.1	Updated section 2.5 to include the automatic Batch EDBC journal entry that will be generated and included details in the Current Design based on existing functionality. Modified the Batch IDs for the EDR and EDBC Sweep.	Pooja Jadhav
4/7/2026	1.2	Added new AA for Deceased non-Primary MC Applicants	Leah Weston
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CA-273037 – Automate Discontinuance of Deceased Individuals in a MAGI or Mixed/MAGI Case

1 OVERVIEW

The purpose of this System Change Request (SCR) is to create a process to auto-discontinue deceased individuals on Medi-Cal programs where there is at least one Active MEM on MAGI Medi-Cal and create a task for workers if the deceased person is the Primary Applicant of the Medi-Cal program. This request is preceded by SCR CA-272105 which excluded Medi-Cal programs with at least one Active MEM on MAGI Medi-Cal from being processed in the monthly Deceased EDBC Sweep (PB00E148).

1.1 Current Design

CalSAWS monthly Deceased EDBC Sweep (PB00E148) runs EDBC for Non-MAGI Medi-Cal/CalFresh/CalWORKs programs if there is an Active Member on the program and their Date of Death is in the past.

There is no automated process to send an EDR to reevaluate the MAGI household when someone is deceased. Prior to the implementation of CA-272105, when the Deceased EDBC swept in the case and EDBC was ran, it would use the existing MAGI Determination (DER) with MAGI Eligible status and the deceased person remained active on Medi-Cal. With SCR CA-272105, the Deceased EDBC sweep job was updated to exclude from processing any Medi-Cal program with at least one Active MEM on MAGI Aid Code until an EDR sweep job was implemented.

CalSAWS existing Skip Discontinue Logic checks for specific criteria based on the requirement to insert cases into SYS_TRANSACT. EDBC will run if the case passes all the checks, otherwise the case is skipped. Currently the Skip Discontinue Logic skips cases where an individual was unexpectedly returned in a DER as Discontinued. If the individual has a Deceased Date, the individual will be skipped.

Note: The automatic journal entry created by Batch EDBC will be inserted for cases as follows:

Journal Category: All

Journal Type: Activity

Short Description: Batch EDBC ran for [Month/Year]

Long Description: Batch EDBC ran for [Month/Year]. Batch EDBC processed for the [Program Name] for the following reasons: <Batch Eligibility Sweep

Code Short Decode>

1.2 Requests

Create a process to auto-discontinue deceased individuals in a MAGI household. If the deceased individual is the Primary Applicant and there are other active individuals on the Medi-Cal program, create a task for the worker to take action.

1.3 Overview of Recommendations

1. Create a MAGI/Mixed EDR Sweep to send an EDR when an Active MEM is deceased and there is at least one Active MEM on a MAGI aid code.
2. Create a MAGI/Mixed EDBC Sweep to run EDBC when the DER is returned from recommendation number one to discontinue the deceased individual from the Medi-Cal program.
3. Update the Skip Discontinue Logic to ignore Individuals who have a deceased date.
4. Create an Automated Action that creates a task for the worker to alert them when the Medi-Cal Primary Applicant is deceased.
5. Create an Automated Action that creates a task for the worker to alert them when a deceased Medi-Cal non-Primary Applicant was discontinued by batch.
6. Update the Batch MAGI to send a Negative Action Reason of '85' when the individual is deceased and the EDR sweep batch run reason code is CT2813_16.

1.4 Assumptions

1. No changes to existing notices. Discontinuance notices for a deceased individual will be tested as part of regression testing efforts.
2. EDRs sent in the month of December will be skipped by Batch MAGI based on the current skip reasons of CT707:
 - a. DE - Deceased person has Tax Household record
 - b. TD - Tax Filing Status Association individual is deceased
3. This SCR only applies changes to Medi-Cal Program, no other programs are impacted.

2 RECOMMENDATIONS

2.1 Page Name – No Impact

2.2 Medi-Cal Eligibility Rules Updates – No Impact

2.3 Deceased Active MEM EDR Sweep

2.3.1 Overview

A new Mixed/MAGI Deceased Active MEM EDR Sweep job will be created to send an EDR when an active, non-primary applicant member is deceased and there is at least one Active MEM on a MAGI aid code.

2.3.2 Description of Change

1. Create a new Batch EDR Run Reason (CT2813_16) as follows:
 - a. Short Decode Name = Deceased Active MEM
 - b. Long Decode Name = Deceased Active MEM
 - c. Batch MAGI Sweep = PB00CH220
 - d. Batch EDBC Sweep = PB00E494
 - e. Skip Discontinued = Y
 - f. Reporting Indicator = Y
2. Create a new batch PB00CH220 'Mixed/MAGI Deceased Active MEM EDR' to perform the following actions (CT2813_16):
 - a. Send a new MAGI Request for a Medi-Cal Program when all the following conditions are met:
 - i. The Medi-Cal program is active.
 - ii. An Active MEM has a Decease Date in the Individual Demographics page.
 - iii. The Decease Date is on or before the batch date and it's 'Verified'.
Note: the Decease Date is updated by the existing 2130, 9003 & 9004 MEDS Alert Automated Actions.
 - iv. The deceased person is not the Primary Applicant, or the Primary Applicant is deceased and is the only Active Member on the program.
 - v. There is at least one Active Member on a MAGI aid code.
 - vi. There is no EDR staged for the same Medi-Cal Program and Effective Date.

Insert the following values:

- i. CalHEERS Transaction Type Code = 'Eligibility Determination Request' (CT297_ED)
- ii. Program ID = Program ID associated with the latest valid EDR or DER Transaction. If the latest valid EDR or DER is for a closed program, then use the Program ID associated with the latest Regular, Accepted and Saved EDBC for the active program with at least one Active MEM on a MAGI Aid Code.
Note: CA-273818, which was implemented in Release 26.03, will introduce a new Batch MAGI Skip Reason (CT707) to skip a Medi-Cal program when the Primary Applicant on the active Medi-Cal program is not the same as the Primary Applicant associated to the Medi-Cal Program on the latest EDR or DER.
- iii. Effective Date = Come-up month
- iv. MAGI Run Reason = Negative Action (CT395_NA).

- v. Batch Indicator = 'Y'
- vi. Batch EDR Run Reasons = Deceased Active MEM (CT2813_16)

2.3.3 Execution Frequency

Monthly – 3 business days prior to Batch 10-day.

2.3.4 Key Scheduling Dependencies

Predecessor: Batch EDBC and PB00CH204
Successor: Batch MAGI

2.3.5 Counties Impacted

All Counties

2.3.6 Category

Core

2.3.7 Data Volume/Performance

10,000 transactions per month

2.3.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution.

2.4 Batch MAGI

2.4.1 Overview

The Batch MAGI will be updated to send a Negative Action Reason of '85' (CT73_04 column 139) when the person is deceased and the EDR sweep batch run reason code is CT2813_16.

2.4.2 Description of Change

1. Send a Negative Action Reason of '85' (CT73_04 column 139) when the person is deceased and the EDR sweep batch run reason code is CT2813_16 "Deceased Active MEM"

2.4.3 Execution Frequency

No change

2.4.4 Key Scheduling Dependencies

No change

2.4.5 Counties Impacted

All Counties

2.4.6 Category

No change

2.4.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.4.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution.

2.5 Deceased Active MEM EDBC Sweep

2.5.1 Overview

The new Deceased Active MEM EDBC Sweep will run EDBC when the DER is returned from the Mixed/MAGI Deceased Active MEM EDR Sweep to discontinue the deceased individual from the Medi-Cal program.

2.5.2 Description of Change

1. Create batch PB00E494 to stage Medi-Cal programs for Batch EDBC processing based on the following criteria:
 - a. A DER was received in response to the EDR initiated by the Mixed/MAGI Deceased Active MEM EDR Sweep job (the Batch Reason Code 'CT2813_16') and the latest status is 'Reviewed'.
 - b. For all Active Medi-Cal programs on the case of the DER, Run Negative Action EDBC (post to SYS_TRANSACT) where the impacted individuals are Active Members.

Insert the following values:

- i. Effective Date = Benefit Month of the DER
- ii. Type Code = CT626_BE
- iii. Sub Type Code = CT942_DP (Deceased Person)
- iv. Created By = <Job's Staff ID>
- v. Updated By = <Job's Staff ID>
- vi. Program ID = <All Active Medi-Cal Program>

- vii. Case ID = <Case ID associated to the latest DER>
- viii. Run Type Code = SP (Single Program)
- ix. Run Reason Code = (null)
- x. Disc Reason Code = CT73_04 (Deceased)

Technical Note: Since this is an individual-level discontinuance, a record will be inserted into TRANS_PERS for all impacted deceased individuals with DISC_RSN_CODE = '04'.

Note: The automatic journal entry created by Batch EDBC will be inserted for cases as follows:

Journal Category: All

Journal Type: Activity

Short Description: Batch EDBC ran for [Month/Year]

Long Description: Batch EDBC ran for [Month/Year]. Batch EDBC processed for the Medi-Cal for the following reasons: **Deceased Person**

~~2. Update the existing Skip Discontinue Logic to ignore Individuals for whom the EDR contained a Deceased Negative Action reason.~~

2.5.3 Execution Frequency

Monthly – 1 business day prior to Batch 10-day including Saturday but excluding Sunday and/or holidays.

2.5.4 Key Scheduling Dependencies

Predecessor: Batch EDBC
Successor: Batch MAGI

2.5.5 Counties Impacted

All Counties

2.5.6 Category

Core

2.5.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.5.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution.

2.6 Batch EDBC – Skip Discontinue Logic

2.6.1 Overview

The existing logic for Skip Discontinue will be updated to ignore individuals for whom the EDR contained a Deceased Negative Action Reason.

2.6.2 Description of Change

1. Update the existing Skip Discontinue Logic to ignore Individuals for whom the EDR contained a Deceased Negative Action reason.

2.6.3 Execution Frequency

No Change

2.6.4 Key Scheduling Dependencies

No Change

2.6.5 Counties Impacted

All Counties

2.6.6 Category

Core

2.6.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.6.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution.

2.7 Interface Name – No Impact

2.8 Automated Actions – Medi-Cal Primary Applicant Deceased and Medi-Cal Household Member Deceased/Discontinued

2.8.1 Overview

Add a new Automated Action "Medi-Cal Primary Applicant Deceased" and "Medi-Cal Household Member Deceased/Discontinued". When the first is active, a Task will be created for the current program worker when the Medi-Cal Primary Applicant is deceased. When "Medi-Cal Household Member

Deceased/Discontinued" is active, a task will be created when a non-primary household member is deceased.

2.8.2 Automated Action Detail Mockup

Automated Action Detail

Edit Close

Action Information

Name: Medi-Cal Primary Applicant Deceased	Type: Create Task	Status: * Inactive
Program(s): MC	Run Date: Monthly 2 days before batch 10-day to match frequency of PB00E148	Source: Batch
Scenario: There are at least two Active MEM on Medi-Cal, and a Decease Date was added for the Primary Applicant.		

Task Information

Task Type: *	
Due Date: Default Due Date	Default Due Date: 3 days
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker
Sibling Assignment: No	
Long Description: The Primary Applicant has been reported as deceased and there are other Active Members on the Medi-Cal program. Please review and take appropriate action.	

Edit Close

Figure 2.2.1 – Automated Action Detail - Medi-Cal Primary Applicant Deceased (View Mode)

Automated Action Detail

Action Information

Name: Medi-Cal Primary Applicant Deceased	Type: Create Task	Status: * <input type="text" value="Inactive"/>
Program(s): MC	Run Date: Monthly 2 days before batch 10-day to match frequency of PB00E148	Source: Batch
Scenario: There are at least two Active MEM on Medi-Cal, and a Decease Date was added for the Primary Applicant.		

Task Information

Task Type: * <input type="text" value="- Select -"/>	
Due Date: <input type="text" value="Default Due Date"/>	Default Due Date: 3 days
Initial Assignment: <input type="text" value="Default Assignment"/>	Default Assignment: Current Program Worker
Sibling Assignment: <input type="text" value="No"/>	
Long Description: The Primary Applicant has been reported as deceased and there are other Active Members on the Medi-Cal program. Please review and take appropriate action.	

Figure 2.2.2 – Automated Action Detail - Medi-Cal Primary Applicant Deceased (Edit Mode)

Automated Action Detail

[Edit](#) [Close](#)

Action Information

Name: Medi-Cal Household Member Deceased/Discontinued	Type: Create Task	Status: * Inactive
Program(s): MC	Run Date: Monthly 2 days before batch 10-day to match frequency of PB00E148	Source: Batch
Scenario: At least one non-primary applicant household member is deceased and was discontinued from the Medi-Cal program by batch.		

Task Information

Task Type: *	
Due Date: Default Due Date	Default Due Date: 10 days
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker
Sibling Assignment: No	
Long Description: A discontinuance action was taken for {Member Name} who was reported as deceased on {Deceased Date}. Update tax household pages and review for any other pertinent changes to other data collection pages.	

[Edit](#) [Close](#)

Figure 2.2.3 – Automated Action Detail - Medi-Cal Household Member Deceased/Discontinued (View Mode)

Automated Action Detail

Action Information

Name: Medi-Cal Household Member Deceased/Discontinued	Type: Create Task	Status: * Inactive ▾
Program(s): MC	Run Date: Monthly 2 days before batch 10-day to match frequency of PB00E148	Source: Batch
Scenario: At least one non-primary applicant household member is deceased and was discontinued from the Medi-Cal program by batch.		

Task Information

Task Type: *
▾ Select ▾

Due Date: Default Due Date ▾	Default Due Date: 10 days
Initial Assignment: Default Assignment ▾	Default Assignment: Current Program Worker
Sibling Assignment: No ▾	

Long Description:
A discontinuance action was taken for {Member Name} who was reported as deceased on {Deceased Date}. Update tax household pages and review for any other pertinent changes to other data collection pages.

Figure 2.2.4 – Automated Action Detail - Medi-Cal Household Member Deceased/Discontinued (Edit Mode)

2.8.3 Description of Changes

1. Add the new Automated Action “Medi-Cal Primary Applicant Deceased”.
 - a. Action Information
 - i. Name: Medi-Cal Primary Applicant Deceased
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): MC
 - v. Run Date: Monthly 2 days before batch 10-day to match frequency of PB00E148
 - vi. Source: Batch
 - vii. Scenario: There are at least two Active MEM on Medi-Cal, and a Decease Date was added for the Primary Applicant.
 - b. Task Information
 - i. Task Type: (null)

- ii. Due Date: Default Due Date
 - iii. Default Due Date: 3 days
 - iv. Initial Assignment: Default Assignment
 - v. Default Assignment: Current Program Worker
 - vi. Sibling Assignment: No
 - vii. Long Description: The Primary Applicant has been reported as deceased on {Deceased Date} and there are other Active Members on the Medi-Cal program. Please review and take appropriate action.
2. Add the new Automated Action "Medi-Cal Household Member Deceased/Discontinued".
- a. Action Information
 - i. Name: Medi-Cal Household Member Deceased/Discontinued
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): MC
 - v. Run Date: Monthly 2 days before batch 10-day to match frequency of PB00E148
 - vi. Source: Batch
 - vii. Scenario: At least one non-primary applicant household member is deceased and was discontinued from the Medi-Cal program by batch.
 - b. Task Information
 - i. Task Type: (null)
 - ii. Due Date: Default Due Date
 - iii. Default Due Date: 10 days
 - iv. Initial Assignment: Default Assignment
 - v. Default Assignment: Current Program Worker
 - vi. Sibling Assignment: No
 - vii. Long Description: A discontinuance action was taken for {Member Name} who was reported as deceased on {Deceased Date}. Update tax household pages and review for any other pertinent changes to other data collection pages.

2.8.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Accessibility

The Automated Action should be assessed for accessibility requirements to meet Accessibility Standards.

2.8.8 Page Usage/Data Volume Impacts

N/A

2.9 Batch – Medi-Cal Primary Applicant Deceased and Medi-Cal Household Member Deceased/Discontinued Automated Actions Batch Job

2.9.1 Overview

This section describes the behavior of a new batch process that will invoke the “Medi-Cal Primary Applicant Deceased” and “Medi-Cal Household Member Deceased/Discontinued” Automated Actions.

2.9.2 Description of Change

Implement a new batch process to invoke the “Medi-Cal Primary Applicant Deceased” and “Medi-Cal Household Member Deceased/Discontinued” Automated Actions.

The Medi-Cal Primary Applicant Deceased Automated Action will be invoked when the Decease Date for a Medi-Cal primary applicant has been added by the system and there are other active members on the MC program.

A task will only be created if an Assigned or In Process “Medi-Cal Primary Applicant Deceased” task does not exist for that case.

These tasks will be created when the following conditions are met:

1. The Primary Applicant on the Medi-Cal program has a Decease Date in the Individual Demographics page
2. The Decease Date was added by the system between the last batch date and the current batch date
3. There are other Active Members on MC program

Note: There is a possibility that existing functionality through MEDS Alerts 2130, 9003 & 9004 will create another task for the deceased primary applicant, if the county has the Task Information with Active status for one of the mentioned alerts.

The Medi-Cal Household Member Deceased/Discontinued Automated Action will be invoked when a non-primary applicant household member has been reported as deceased, was discontinued by batch, and the Medi-Cal program is still open.

1. A deceased date was added for a member on Medi-Cal
2. The member is the non-primary applicant
3. The member was discontinued by batch
4. The Medi-Cal is still open

Multiple Medi-Cal Household Member Deceased/Discontinued tasks on the same case are possible if more than one non-primary applicant has been discontinued as deceased and meet the conditions above.

2.9.3 Execution Frequency

The batch job will be scheduled monthly 2 days before batch 10-day to match frequency of PB00E148.

2.9.4 Key Scheduling Dependencies

After EDBC

2.9.5 Counties Impacted

All CalSAWS Counties

2.9.6 Category

Non-Core

2.9.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.9.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.10eHIT – No Impact

2.11 Form/NOA Name – No Impact

2.12 Report Name – No Impact

2.13 Data Warehouse Name – No Impact

2.14 Data Change – No Impact

2.15 Automated Regression Test – No Impact

3 SUPPORTING DOCUMENTS

4 OUTREACH

4.1 Lists – No Impact

5 APPENDIX