

CalSAWS

California Statewide Automated Welfare System



Design

CA-286260

Replace Future Pending Event When BDA is
Changed to a Prior Date

DOCUMENT APPROVAL HISTORY

Prepared By	Makenzie Molina
Reviewed By	Laura Alba, Maggie Orozco-Vega, ThuyTien Nguyen, Nina Butler, Elisa Miller, James Dorame

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CA-286260 – Replace Future Pending Event When BDA is Changed to a Prior Date

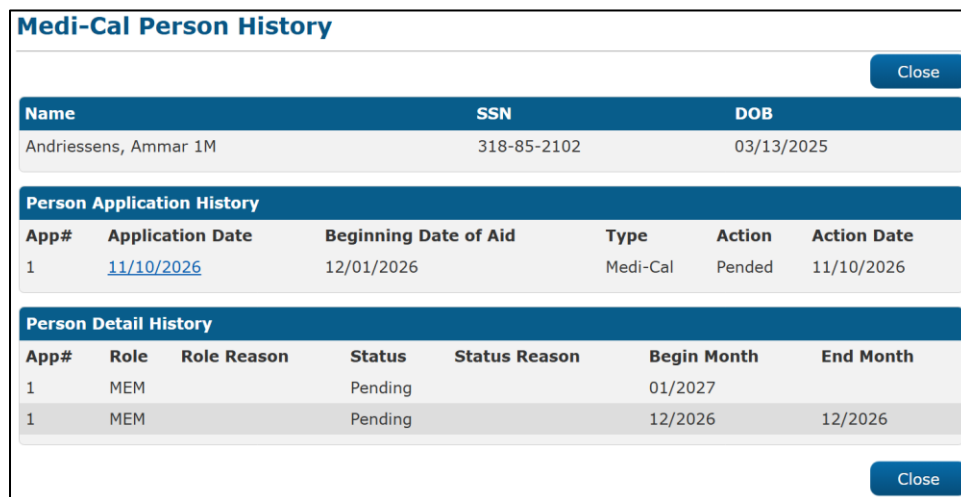
1 OVERVIEW

The logic that creates a pending event needs to be updated to prevent the Medi-Cal program from remaining in pending status.

1.1 Current Design

When the Beginning Date of Aid (BDA) is initially set in a future month and subsequently moved to an earlier month, the system creates a new event with an end month that falls one month before the original BDA. . If the future benefit month is not yet available to run EDBC at the time of the BDA change, the original future-dated event remains in pending status, even though EDBC is run through high date. The user must rerun EDBC once the month becomes available.

The following figure shows how the system currently captures two events when a BDA is moved to an earlier month. In the scenario, the BDA was updated from 01/01/2027 to 12/01/2026. This created an event for 12/2026 – 12/2026 and left an event open for 01/2027 – high-date.



The screenshot displays the 'Medi-Cal Person History' page for a person named Ammar 1M. It includes three tables: 'Person Application History' and 'Person Detail History'. The application history shows a pending application for 12/01/2026. The detail history shows two pending events: one for 01/2027 and another for 12/2026.

Medi-Cal Person History						
Name	SSN	DOB				
Andriessens, Ammar 1M	318-85-2102	03/13/2025				
Person Application History						
App#	Application Date	Beginning Date of Aid	Type	Action	Action Date	
1	11/10/2026	12/01/2026	Medi-Cal	Pended	11/10/2026	
Person Detail History						
App#	Role	Role Reason	Status	Status Reason	Begin Month	End Month
1	MEM		Pending		01/2027	
1	MEM		Pending		12/2026	12/2026

Figure 1.1.1 – Medi-Cal Person History Page – Current Design

1.2 Requests

Update the system to replace the future event when the beginning date of aid is changed to an earlier month.

1.3 Overview of Recommendations

1. When a BDA is moved to an earlier date, replace the original BDA with the new date and leave the end date open for MC programs.

1.4 Assumptions

1. This change will only impact Medi-Cal.
2. The BDA cannot be moved to an earlier date if the program is in Active status.
3. Existing CalSAWS functionality remains unchanged unless specified in this design document.

2 RECOMMENDATIONS

2.1 Application Detail Page

2.1.1 Overview

Update the logic on the Application Detail page so that when a previously saved BDA is moved to an earlier date, the original BDA is replaced to be the new BDA with an open end date.

2.1.2 Application Detail Page Example

1. A MAGI referral is received on 11/10/2026 for Benefit Month of 01/2027. The user links the referral and the BDA is set to 01/01/2027. Shortly after, a second referral is received for Benefit Month of 12/2026. The user updates the BDA for 12/01/2026.

Application Detail

*- Indicates required fields

Save and Return Cancel

Program Type: Medi-Cal View Application: App #1 - 11/10/2026 View Change Reason: *

Program Application Information

App #: 1 Source: * Email Application Date: * 11/10/2026

Inter-County Transfer: No

Person Information

Name	DOB	Application Date *	Beginning Date of Aid *
Ammar Andriessens	03/13/2025	11/10/2026	01/01/2027
Jeptha Braner	10/15/2009	11/10/2026	01/01/2027
Mayola Braner	08/10/1989	11/10/2026	01/01/2027
Svert Celeste	04/19/2012	11/10/2026	01/01/2027

Save and Return Cancel

Figure 2.1.1 – Application Detail Page

- On the Medi-Cal Person History page, it can be seen that the only event in the Person Detail History section is 1 'Pending' event with a Begin Month of 12/2026 (the updated BDA month).

The screenshot shows the 'Medi-Cal Person History' page. It contains three main sections:

- Personal Information:** Name: Andriessens, Ammar 1M; SSN: 318-85-2102; DOB: 03/13/2025.
- Person Application History:** A table with columns: App#, Application Date, Beginning Date of Aid, Type, Action, Action Date. Row 1: App# 1, Application Date 11/10/2026, Beginning Date of Aid 12/01/2026, Type Medi-Cal, Action Pended, Action Date 11/10/2026.
- Person Detail History:** A table with columns: App#, Role, Role Reason, Status, Status Reason, Begin Month, End Month. Row 1: App# 1, Role MEM, Role Reason (blank), Status Pending, Status Reason (blank), Begin Month 12/2026, End Month (blank). This row is highlighted with a red border.

Figure 2.1.2 – Medi-Cal Person History Page

2.1.3 Description of Changes

- Update the logic so that when a saved future-dated BDA is moved to an earlier date, the system replaces the original event with the new BDA begin month and keeps the end date open. This ensures the BDA remains a single continuous event rather than splitting into two separate events.
 - Note: Only make this change for the Medi-Cal Program.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary
 - Click 'View Details' within a Medi-Cal Program Block
 - Click 'Edit'
 - Click an 'Edit' in the Program Persons section
 - Click 'Edit' in the Application Detail section

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

This page should be assessed for accessibility.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Eligibility Rules Updates – No Impact

2.3 Batch Name – No Impact

2.4 Interface Name – No Impact

2.5 eHIT – No Impact

2.6 Form/NOA Name – No Impact

2.7 Report Name – No Impact

2.8 Data Warehouse Name – No Impact

2.9 Data Change – No Impact

2.10 Automated Regression Test

2.10.1 Overview

Assess for creation of new regression test scripts and updates to existing regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.10.2 Description of Change

1. Evaluate each system test scenario 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

N/A

4 OUTREACH

N/A

5 APPENDIX

N/A