

**Executive Summary**

CalHEERS Feature Release 16.2 (to be deployed on 03/07/2016) contains updates to following:

**Key New Features** that have been added or modified in this release:

- Eligibility & Enrollment
- Consumer Assistance

**Key System Updates** that have been deployed in this release:

- Eligibility & Enrollment
- Interfaces

**Key Fixes** that have been updated or resolved in this release:

- None

**Alternate Procedures** that have been provided with this release:

**No Longer in Effect** with this release

- None

**New** with this release

- None

**Purpose and Scope**

This document describes the content of the CalHEERS Feature Release 16.2. Any known issues are described together with key features of the release contents, alternate procedures, and actions required.

**Key New Features**

The following summarizes the new features included in this release.

| Ref ID   | Type           | Previous Design/Problem                      | New Functionality In this Release  | Pages Impacted |
|--|----------------|--|--|----------------|
| <b>Eligibility &amp; Enrollment</b>                                      |                |  |  |                |
| <b>Former Foster Youth (FFY) Phase II Page Flow &amp; Schema Changes</b> |                |  |  |                |
| 45507  | Change Request | This functionality did not exist previously. | <p>Eligibility criteria for Former Foster Youth (FFY) in CalHEERS includes the below mentioned:</p> <ul style="list-style-type: none"> <li>• The flow in the portal pages is changing. When a single applicant attests to being an FFY, the pages that will be suppressed are: Tax, Health, and the Income pages. NOTE: If he/she has others applying on the same application, the flow of the pages will not change. In accordance with the CMS Verification Plan, the County Social</li> </ul> | NA             |

| Ref ID   | Type           | Previous Design/Problem                           | New Functionality In this Release  | Pages Impacted |
|--|----------------|---|--|----------------|
|  |                |   | <p>Service offices (CEWs) will verify that FFY individuals were in Foster Care /Medicare at age 18 and are no longer in Foster Care, qualifying them for the FFY program. Administrative verification for FFY is now allowed.</p> <ul style="list-style-type: none"> <li>• FFY are able to upload documents for verification of FFY status.</li> <li>• The value (Foster Parent) has been added to the dropdown list on the <i>Personal Data- Demographic Information</i> page for the question: <b>“Who is the Primary Caretaker of this child?”</b> however, the foster parents are not given linkage to the parent/caretaker coverage groups for Medi-Cal.</li> </ul> |                |
| <b>CCHIP Interface &amp; integration into CalHEERS</b> |                |   |  |                |
| 4846   | Change Request | CCHIP did not integrate with CalHEERS previously. | <p>CCHIP now uses Modified Adjusted Gross Income (MAGI) income calculations to determine eligibility, whereas Advanced Premium Tax Credit (APTC) income calculations were used before. CalHEERS business logic now allows eligibility determinations to integrate with CCHIP eligibility for participating counties.</p> <p>CCHIP is a state and federally funded public program and as per guidance, children eligible for CCHIP are NOT eligible for APTC.</p> <p>The CCHIP program is only</p>  | NA             |

| Ref ID   | Type           | Previous Design/Problem                      | New Functionality In this Release   | Pages Impacted   |
|--|----------------|--|---|--|
|  |                |  | <p>applicable for consumer in the following three counties:<br/>San Mateo<br/>San Francisco<br/>Santa Clara.</p> <p>This program is case managed by specific county CCHIP offices.</p>  |  |
| <b>Consumer Assistance</b>                           |                |  |   |  |
| <b>Expedited/Flexible Application Entry for SCRs</b> |                |  |   |  |
| 7169   | Change Request | This functionality did not previously exist. | <ul style="list-style-type: none"> <li>• In an effort to reduce the time it takes to complete the paper application process, SCRs and/or any Covered California designated role are now able to skip required fields and continue entering all information provided by the Consumer, as the application pages are now available in a flexible page view where all pages in the application are laid out from top to bottom without having to continue from one page to the next.</li> <li>• When SCRs log into the <i>Individual homepage</i> and click on the <b>Apply for &lt;current year&gt;, Resume, Report a Change, or Renew</b> button, the <i>View Confirmation</i> popup displays and says, <b>“Would you like to open in the Consumer View or the Flexible Admin View?”</b></li> <li>• The <i>Case Notes</i> page has been renamed as the <i>Notes</i> page, and displays within the flexible application.</li> <li>• The <i>Search Individual</i> page now includes a <b>New</b></li> </ul> | <ul style="list-style-type: none"> <li>• All application pages</li> <li>• Individual homepage</li> <li>• Notes</li> <li>• Search Individual</li> </ul> |

| Ref ID | Type | Previous Design/Problem | New Functionality In this Release         | Pages Impacted |
|--------|------|-------------------------|---|----------------|
|        |      |                         | <b>Flexible App in Admin View</b> button. |                |

### Key System Updates

The following summarizes the modified features included in this release.

| Ref ID  | Type           | Previous Design/Problem  | Updated/Resolved Functionality In this Release   | Pages Impacted |
|---|----------------|--|--|----------------|
| <b>Eligibility &amp; Enrollment</b>   |                |  |  |                |
| <b>Non-MAGI screening and Citizenship/Immigration questions will not be displayed for those members who are not applying for health benefits.</b> |                |  |  |                |
| 11708   | Change Request | CalHEERS displayed the Non-MAGI questions related to disability, long-term care, and Medicare, along with Citizenship and Immigration questions to non-applying members.   | CalHEERS does not display the Non-MAGI questions related to disability, long-term care, and Medicare, along with Citizenship and Immigration questions to those household members who are not applying for health benefits.  | NA             |
| <b>Implementation of CalHEERS Functionality for E-mail/Electronic Notification to View Notice in CalHEERS Secure Mailbox</b>                      |                |  |  |                |
| 32825   | Change Request | <ul style="list-style-type: none"> <li>The CalHEERS system preferred means of communications had mail, e-mail, text and telephone as options.</li> <li>The CalHEERS system provided e-mail or text as options to alert the consumer about new notifications in their secured mail box.</li> <li>The CalHEERS system allowed consumers to view, save, and delete their</li> </ul> | <p>This change includes a few modifications and new requests, detailed below.</p> <p><b>Modifications:</b></p> <ul style="list-style-type: none"> <li>The “Text” option is removed, and “Telephone” has been renamed as “Phone” in the list of preferred means of communications.</li> <li>The CalHEERS system uses e-mail only to alert the consumer about new notifications in their secured mail box.</li> <li>The CalHEERS system allows consumers to view, save, and archive their CalHEERS e-mail notifications from their web portal login account.</li> </ul> <p><b>New with this change:</b></p> <ul style="list-style-type: none"> <li>The CalHEERS system sends an e-mail to the Consumer that a</li> </ul> | NA             |

| Ref ID | Type | Previous Design/Problem   | Updated/Resolved Functionality In this Release  | Pages Impacted |
|--------|------|---|---|----------------|
|        |      | <p>CalHEERS e-mail notifications from their web portal login account.</p> | <p>notice is available for viewing in the CalHEERS Secure Mailbox, when a Consumer selects "E-mail" as their Preferred Method of Communication. This e-mail will only be generated for Consumers who have a CalHEERS Account, and the e-mail is sent in the Consumer's preferred language.</p> <ul style="list-style-type: none"> <li>• The CalHEERS system requires the consumer to enter the e-mail address twice to confirm the e-mail address entered is correct.</li> <li>• The CalHEERS system changes the preferred Method of communication to "Mail" when an e-mail notification returns due to invalid e-mail address; a paper notice will be issued to the consumer informing them of the invalid e-mail address and the steps to change the preferred means of communication back to electronic notification.</li> <li>• The CalHEERS system issues an e-mail to those consumers who have selected "E-mail" as the preferred means of communication notifying them about their decision and informing that they will no longer receive paper mailings.</li> <li>• The CalHEERS system defaults the preferred method of communication to "Mail" for consumers who don't have a CalHEERS account. Notices generated after creation of a mailbox will only be placed in the secure mailbox.</li> <li>• This functionality does not apply to NOD02.</li> </ul> |                |

| Ref ID  | Type           | Previous Design/Problem  | Updated/Resolved Functionality In this Release  | Pages Impacted |
|---|----------------|--|---|----------------|
| <b>Implement Functionality for Discontinuance and Denial NOA</b>                      |                |  |   |                |
| 50102   | Change Request | <ul style="list-style-type: none"> <li>The CalHEERS system denied MAGI Medi-Cal individuals who were eligible, but went to Pending when a Negative Action was applied.</li> <li>The CalHEERS System observed a 10-day notice period (10 calendar days from the last day of the current month) prior to discontinuing benefits for an individual who had gone from Conditionally Eligible or Eligible to Pending for MAGI Medi-Cal, and a Negative Action was applied.</li> </ul> | The CalHEERS system discontinues Pending Medi-Cal individuals that were previously Conditionally Eligible, or Eligible on Medi-Cal for the same application, when a Negative Action is applied. | NA             |
| <b>2016 FPL Table Update</b>  |                |  |   |                |
| 47817   | Change Request | The MAGI Medi-Cal FPL table contained 2015 values.   | The MAGI Medi-Cal FPL table contains 2016 values.   | NA             |
| <b>Expand CalHEERS logic to support eligibility programs that are not prospective</b> |                |  |   |                |
| 56211   | Change Request | Multiple executions of the eligibility determination were initiated in the same or subsequent days. Because of the gap in logic, CalHEERS was generating multiple unnecessary database segments.   | The business rules have been expanded to support programs that are date dependent as well as prospective (e.g. Medi-Cal Access Program) in order to reduce storage and overhead.                | NA             |

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|---|----------------|--|---|----------------|
| <b>Interfaces</b>   |                |  |   |                |
| <b>Utilize the administrative verifications from SAWS to grant a full eligibility determination in the first call to BRE.</b> |                |  |   |                |
| 10804   | Change Request | CalHEERS only allowed California Residency Verification at the first call to the BRE, if all the data elements were “administratively verified” by the eligibility worker at the county level. | <p>The federal hub is always called for all new intakes, or new-to-CalHEERS cases from SAWS. If and when administrative verifications exist CalHEERS will now use them where before they were bypassed on the first call to BRE.</p> <p>CalHEERS now allows the verification of the following elements, if “administratively verified” by the eligibility worker at the county level, to be granted a full eligibility determination at the first call to the BRE.</p> <ul style="list-style-type: none"> <li>• California Residency Verification</li> <li>• Social Security Verification</li> <li>• Citizenship Verification</li> <li>• Lawful Presence Verification</li> <li>• Not Receiving Minimal Essential Coverage Verification</li> <li>• Not Deceased Verification</li> <li>• Not Incarcerated Verification</li> <li>• Income Verification</li> <li>• Authorized Representative</li> </ul> <p>The objective of this change is to decrease the number of cases that pended the first run to only be determined eligible when a second eligibility run was made.</p> | NA             |
| <b>Transfer of CalNOD02 generation from CalHEERS to SAWS</b>  |                |  |   |                |
| 35243   | Change Request | CalHEERS generated CalNOD02 (MAGI Medical Notice of Action).   | SAWS will generate CalNOD02 notices that result from Intake and/or Report a Change EDRs, and send a copy to CalHEERS for reference, and to display in the mailbox, documents, and correspondence page.  | NA             |

| Ref ID                                  | Type           | Previous Design/Problem                    | Updated/Resolved Functionality In this Release   | Pages Impacted |
|---|----------------|--|--|----------------|
| <b>SAWS eHIT Interface: 4.1 updates</b> |                |  |  |                |
| 37037                                   | Change Request | SAWS eHIT interface Schema had version 3.0 | <p>SAWS eHIT interface Schema has version 4.1</p> <p>This change enhances the SAWS schema with multiple changes. The following key changes are highlighted:</p> <ul style="list-style-type: none"> <li>• Business Validations documented and enhanced</li> <li>• Remove a person indicator added</li> <li>• Add a person indicator added</li> <li>• Change indicator added to Application Node, Person Node</li> <li>• Indicator for Consumer Protection program – DI: Deemed Infant was added</li> <li>• New Former Foster Care questions were added as result of CR 45507</li> <li>• Application identifiers for both SAWS and CalHEERS were added/enhanced</li> <li>• The environment element was enhanced                             <ul style="list-style-type: none"> <li>• For DER, CalHEERS passes back the environment sent by SAWS</li> <li>• For DER-U, CalHEERS passes CalHEERS environment details</li> <li>• USCitizenInd , EligibleImmigrationInd and QualifiedNonCitizenAttestationInd element moved to the person level, and made optional as result of CR 11708</li> <li>• A significant number of elements were made unbounded to facilitate the addition of values.</li> <li>• The origination code for unsolicited DERS was added: consumer, agent, SCR, Auto generated, CEW, CEC, Other</li> <li>• Only 2 years of historical income data will be passed</li> </ul> </li> </ul> | NA             |

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|---|----------------|--|--|----------------|
|   |                |  | <ul style="list-style-type: none"> <li>Eligibility Evaluation Reason Code:                             <ul style="list-style-type: none"> <li>No Qualifying Life Event</li> <li>Life Event is not within Period</li> <li>Life Event needs Verification</li> </ul> </li> <li>A CCHIP Eligibility program node was added</li> <li>NaturalCitizenInd element was removed</li> <li>MAGI Income data element will be populated to support CR 35243/SB1341.</li> <li>MAGI Income limit data element will be populated to support CR 35243/SB1341.</li> </ul> |                |
| <b>Update the Business Rules Engine to calculate income using begin and end dates of each income source</b> |                |  |  |                |
| 37033   | Change Request | CalHEERS business rules engine (BRE) used to calculate the income for the entire month, irrespective of the start and end dates of income.                                 | CalHEERS BRE is updated to calculate and prorate income using begin and end dates of each income source and income amounts, for all income frequencies. The Prorated Monthly Amount is equal to the Monthly Amount multiplied by (the # of Active Days in the Month divided by the # of Total Days in the Month).  | NA             |
| <b>EDR-C Mitigation of Near Consecutive Eligibility Determination Request submissions</b>                   |                |  |  |                |
| 42378   | Change Request | Due to rapid submission and resubmission of cases by CEWs, the CalHEERS system was experiencing database contention, leading to performance issues and system degradation. | The new behavior will provide for sequential processing of a unique county/case identifier to mitigate the concurrency issue.  | NA             |

**Key Fixes**

The following summarizes the key defect fixes implemented in this release.

| Ref ID | Type | Previous Design/Problem | Updated/Resolved Functionality In this Release | Pages Impacted |
|--------|------|-------------------------|--|----------------|
| None   |      |                         |  |                |

**Alternate Procedures**

**Summary of Alternate Procedures**

This section summarizes Alternate Procedures **No Longer in Effect** as of this release. Except for the following (and those noted in previous release notes), all other Alternate Procedures from previous releases remain in effect.

| #    | Alternate Procedures No Longer in Effect | Ref ID | Release Delivered |
|------|--|--------|-------------------|
| None |  |        |                   |

This section summarizes the **NEW** Alternate Procedures for known issues agreed to be resolved in a future release.

| #    | New Alternate Procedures | Ref ID | Planned Release |
|------|--------------------------|--------|-----------------|
| None |                          |        |                 |