

# [CIV-103668] Migrate Sutter County IVR to Amazon Connect

- Resolved: 01/21/2020 09:57 AM

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Michael T. Wright</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[19.11]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.01.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>370</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/20/2019 10:13 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-207026</b>

## Non-Committee Review:

Sutter County Only, Approved by Laura Steffens 10/31/2019

## Expedite Approval:

Approved by Karen J Rapponotti on 09/06/2019

## Current Design:

Currently the Sutter County IVR is on the Cisco UCCE Platform

## Request:

Move the currently IVR functionality from the Cisco platform to the Amazon Connect platform.

## Recommendation:

- 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
- 2) Recreate all IVR Web Service interactions using AWS Lambda.
- 3) Update Useful links in CCP for Sutter County specific links.

## Outreach

### Description:

Train Contact Center staff on differences between Amazon Connect and Cisco UCCE.

## Migration Impact

### Description:

Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

## Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

## Operational Impact:

### Estimate:

**370**

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
DBA :	0	Eligibility :	0	Fiscal :	0
Imaging :	0	IVR/CC :	260	Online :	10
Performance :	0	Reports :	0	Security :	0
System Test Support :	100	Tech Arch :	0	Tech Ops :	0
Training :	0				

## Content Revision

Pending CCB

### Status-1:

## Content Revision

### Description-1:

1. Recommendation Change:

Before:

- 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
- 2) Recreate all IVR Web Service interactions using AWS Lambda.
- 3) Update Useful links in CCP for Sutter County specific links.

After:

- 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
- 2) Recreate all IVR Web Service interactions using AWS Lambda.
- 3) Update Useful links in CCP for Sutter County specific links.
- 4) Remove the Live Chat link for Sutter County in C4Yourself.com

2. Estimate Change: N/A

- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:  
Content Revision  
Description-3:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:  
Content Revision  
Description-4:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:



# [CIV-104373] Data Change: Update RE Due Date for SSI/SSP Households

- Resolved: 11/26/2019 03:27 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jennifer Chen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[19.11]</b>	Designer Contact:	<b>Mark Keehn</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>20.03.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>288</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:		Created:	<b>06/18/2019 03:08 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Consortium Contact:	<b>Tyler Vaisau</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2019-11-19 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-209006</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

SCR CIV-101471 updated CF EDBC to allow for SSI/SSP households to qualify for CalFresh. These households as receiving Public Assistance and therefore not eligible for ESAP.

#### Request:

Counties were informed of an alternative process through CIT # 0032 - 19. Counties have requested that affected cases are updated through a data change.

#### Recommendation:

Identify SSI/SSP household that would otherwise qualify for ESAP had they not been considered Public Assistance. For these cases, apply the following:

- 1) Update the RE Due Month based on approving EDBC and accurate staggered Due Month
- 2) Generate Journal entry for updated cases
- 3) Generate a list of cases that have a staggered redetermination due date that doesn't match expectations and cannot be accurately updated.

#### Outreach

#### Description:

Counties will be provided a list of cases with SSI/SSP Only CF programs with a staggered redetermination due date that doesn't match expectations and cannot be accurately updated.  
CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2019 > CIV-104373

#### Migration Impact

#### Description:

Joint design has been approved through the CalWORKs/CalFresh Committee. LRS will implement this Change with SCR CA-209006.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

User would need to manually adjust the Redetermination Due Date by adding 12 months.

#### Operational Impact:

#### Estimate:

**288**

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
DBA :	0	Eligibility :	221	Fiscal :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Reports :	0	Security :	0
System Test Support :	67	Tech Arch :	0	Tech Ops :	0
Training :	0				

#### Content Revision

Pending CCB

#### Status-1:

#### Content Revision

#### Description-1:

1. Recommendation Change:  
N/A

2. Estimate Change:  
N/A

3. Release Change:  
Before: 19.11  
After: 20.01

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

# [CIV-103671] Migrate Shasta County IVR to Amazon Connect

- Resolved: 01/24/2020 08:06 AM

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Michael T. Wright</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.01]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.01.31</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>370</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/20/2019 10:22 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-207026</b>

**Non-Committee Review:** Shasta County Only, Approved by Kathryn Cooper 10/8/2019

**Expedite Approval:** Approved by Karen J Rapponotti on 09/06/2019

**Current Design:** Currently the Shasta County IVR is on the Cisco UCCE Platform

**Request:** Move the currently IVR functionality from the Cisco platform to the Amazon Connect platform.

**Recommendation:**

- 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
- 2) Recreate all IVR Web Service interactions using AWS Lambda.
- 3) Update Useful Links in CCP for Shasta county specific links.

**Outreach Description:** Train Contact Center staff on differences between Amazon Connect and Cisco UCCE.

**Migration Impact Description:** Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A

**Operational Impact:**  
**Estimate:** **370**

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
DBA :	0	Eligibility :	0	Fiscal :	0
Imaging :	0	IVR/CC :	260	Online :	10
Performance :	0	Reports :	0	Security :	0
System Test Support :	100	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:  
 Before:  
  - 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
  - 2) Recreate all IVR Web Service interactions using AWS Lambda.
  - 3) Update Useful links in CCP for Shasta County specific links.
 After:  
  - 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
  - 2) Recreate all IVR Web Service interactions using AWS Lambda.
  - 3) Update Useful links in CCP for Shasta County specific links.
  - 4) Remove the Live Chat link for Shasta County in C4Yourself.com

2. Estimate Change: N/A

- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:  
Content Revision  
Description-3:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:  
Content Revision  
Description-4:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:



## [CIV-10075] Add Need Categories for Family Stabilization and Housing Support to Needs Detail page

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Raghu Reddy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>780</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>12/29/2017 02:25 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:	<b>2019-10-25 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-205441</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti - 6/12/2019

**Current Design:** There is no Need Category of "Family Stabilization" on the Needs Detail page.

**Request:** To track Family Stabilization needs and payments in the system, three new Family Stabilization need categories with nine need types under each category will need to be added to the Need Detail page.

**Recommendation:** To track Family Stabilization (FS) and Housing Support Program (HSP) needs and payments in the system, the following new Need categories and subsequent Need Types under them will be added:

1. Family Stabilization (FS)
  - a. Domestic Abuse Services
  - b. Mental Health Services
  - c. Substance Abuse Services
  - d. Ancillary/Other Services
  - e. Rental Assistance
  - f. Security Deposits
  - g. Utility Payments
  - h. Moving Costs
  - i. Hotel/Interim/Temp Housing
  - j. Other

2. Family Stabilization – Transportation
  - a. Bus Card
  - b. Campus Parking
  - c. Bus pass – No Valid Month
  - d. Bus Pass – Valid Month
  - e. Bus Ticket
  - f. Bus Token
  - g. Gas Card
  - h. Imprest Cash
  - i. Transportation

NOTE: Bus Card is only available in LRS system. The above need types other than "Bus Card" will be issued as Valuables in both C-IV and LRS systems.

3. Housing Support Program (HSP)
  - a. Full Rent Assistance
  - b. Partial Rent Assistance
  - c. Additional Case Rental Payment
  - d. Security Deposits
  - e. Utility Payments
  - f. Moving Costs
  - g. Hotel / Interim / Temp Housing
  - h. Habitability Items

i. Other

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Fiscal Committee. LRS will implement this change with SCR CA-205441 in the 20.03 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

780

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
DBA :	0	Eligibility :	0	Fiscal :	600
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Reports :	0	Security :	0
System Test Support :	180	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

1. Recommendation 2.2.3

4. Activities will not be required for Family Stabilization (FS) or Housing Support Program (HSP) Need types, however workers can link existing activities to the Service Arrangement if needed.

2. Recommendation 2.3.3

2. LRS Only:

• Update the code value of Pay Code (CT 623) "AC" used for "Approved Relative Caregiver" in LRS to "1Z".

Category	Short Description	Old Code Value	New Code Value
623	Approved Relative Caregiver	AC	1Z

After:

1. Recommendation 2.2.3

4. Modify page logic to not validate for Activities for need categories for any of the following:

- Family Stabilization (FS)
- Family Stabilization – Transportation
- Housing Support Program (HSP)

2. Recommendation 2.3.3

2. LRS Only:

• Update the code values of the following Pay Code (CT 623) in LRS as they will now be used for Family Stabilization Pay

Codes.

Category	Short Description	Old Code Value	New Code Value
623	Approved Relative Caregiver	AC	1Z
623	Learning Disability Assessment	AL	1X
623	Vocational Assessment	AS	1Y

2. ETC Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A



4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

2.3 Payment Request Detail  
2.3.3 Description of Changes

6. C-IV Only: Update the 'Pay Code' drop down to only have the pay codes corresponding to the Need Category of Family Stabilization or Housing Support Program. For ex. If a Need Category of 'Family Stabilization' is selected, only the pay codes relevant to it (listed in Recommendation 1 of Section 2.3.3) will be populated. The pay code will not be automated. The user will need to manually select a pay code from the Pay Code drop down. Update the logic in C-IV to only display the pay codes that are relevant to the Need Category on Payment Request Detail page. This can be done by adding a reference table column of 'custom pay code' to CT 1870.

After:

2.3 Payment Request Detail  
2.3.3 Description of Changes

6. C-IV Only: The Housing Support Program (HSP) pay codes will now be available to "Welfare to Work" and "General Assistance Program (Managed)" in addition to "CalWORKS". Please see spreadsheet "HSP\_PayCodes\_FundCodes" under Supporting documents -Section 3 for details. Update the 'Pay Code' drop down to only have the pay codes corresponding to the Need Category of Family Stabilization or Housing Support Program. For ex. If a Need Category of 'Family Stabilization' is selected, only the pay codes relevant to it (listed in Recommendation 1 of Section 2.3.3) will be populated. The pay code will not be automated. The user will need to manually select a pay code from the Pay Code drop down. Update the logic in C-IV to only display the pay codes that are relevant to the Need Category on Payment Request Detail page. This can be done by adding a reference table column of 'custom pay code' to CT 1870.

2. ETC Change: N/A

3. Release Change: N/A

4. Funding Source Change:  
Before: C-IV M&O  
After: Premise/Cal-OAR

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

3. Release Change: {Description of Release Change}  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

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3. Release Change: {Description of Release Change}  
Before:  
After:



## [CIV-102568] ACL 18-92, ACL 18-107 Transitional Nutrition Benefit Program Recertification

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jagadeesh Dasu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Mark Keehn</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>3232</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:	<b>ACL 18-92, ACL 18-107</b>	Created:	<b>10/25/2018 01:29 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Consortium Contact:	<b>Tyler Vaisau</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-109</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2019-11-19 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-205328</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved 11/26/2019 - K. Rapponotti

#### Current Design:

Currently CalSAWS will only define a 12 month recertification period when TNB is initially approved. In addition, an ongoing TNB program can only be closed due to eligibility for CF within the same case. There is currently no capability to send out the TNB recertification packet or to discontinue TNB based on failing the TNB recertification process.

#### Request:

This SCR will implement the TNB Recertification logic required for the TNB program, which was introduced with SCR CA-203103 CIV-101471 CalFresh Ending SSI Cash-Out.

ACL 18-92 provides policy instruction for the Transitional Nutrition Benefit (TNB) Program.

ACL 18-107 provides policy instruction for the Implementation of the Transitional Nutrition Benefit Program Notices

#### Recommendation:

Online

1. Update codes tables to display TNB Recertification (TNB 4) on Customer Reporting Detail Page. This requires no changes to the existing Customer Reporting pages.
  - a. Add TNB Recertification as a tracked Customer Report. (CT 329)
  - b. Define the statuses to be used for the TNB 4 Report Type (CT 258).
  - c. C-IV Only: Add Customer Reporting questions for completeness determination to be displayed with TNB 4. (CT 746)
2. Update codes table (CT 10398) to define which Customer Report Incomplete Reason Codes are valid for an incomplete TNB 4:
  - a. No signature
  - b. Missing Answers for Household Changes
  - c. Household Changes reported – No CF Application
  - d. Household Changes reported – Incomplete CF Application
3. Add new editable field on Customer Reporting Detail Page to track whether the TNB household had any changes. This will be a user updated field.
  - a. Household Changes – Yes/No
4. Update the Monthly Productivity List and Monthly Productivity List Detailed Result (CalSAWS Only) pages to search for TNB 4.
5. Add a new simplified recertification process to the Your Benefits Now (YBN) portal to allow the participant to upload a filled out TNB 4 form.
6. Add the TNB 4 form as a document type to the C4Yourself (C4Y) Upload Document page.
7. Add the TNB 4 form as a document type to the C4Y mobile application Upload Document page.
8. Update the Task Detail page to display the 'View Images' button when the TNB 4 generated task is viewed (CalSAWS Only).

Eligibility

9. Define a new Reporting Type, 'TNB Non Reporting' (CT542) to be used as the reporting type for any EDBC or Program Detail defined during a 6-month TNB period (i.e., any TNB period other than the initial 12-month period).
10. Define/Display the 'RE' EDBC Run Reason for TNB programs. This also applies to Manual EDBC.
  - a. CalSAWS Only –Automatically determine the 'RE' EDBC Run Reason. This will not display to the user.
  - b. C-IV Only – Display the 'RE' Run Reason on the Run EDBC page.
11. C-IV Only – Display the 'SAR7' Run Reason on the Run EDBC page when processing any benefit month that falls within a six-month period (i.e., any period other than the initial period).
12. Update EDBC authorization logic to take appropriate actions (e.g., create/update redetermination records and set Customer Report to completed) during TNB recertification.
13. Update EDBC logic to set initial TNB recertification periods to 12 months and all subsequent TNB periods to 6 months.
14. Update TNB EDBC logic to discontinue based on the results of the TNB 4 and, if applicable, the presence and outcome of a CF application and the associated CF EDBC when processing a TNB recertification.
15. CalSAWS Only – Update TNB Status Reason (e.g., No SSI/SSP) logic to allow period required changes to be applied even after initial TNB recertification.
16. CalSAWS Only - Add validations to the system to prevent the user from running the incorrect benefit month EDBC after the current packet due date where status of the packet is 'Reviewed- Ready to Run EDBC'. This change will align TNB with the other programs (CW, CF, GA, RCA, CAPI) which use these validations introduced with SCR CA-52723 CIV-100710 Customer Reporting Updates.
17. C-IV Only: Update the 'Program Code' code table (CT18). Specifically, set the 'Change Reason Program' column to 'Y'. This will define the NB program as a Change Reason program and bring C-IV in alignment with CalSAWS prior to migration. This does not mean that C-IV will begin using Change Reason logic prior to migration.

#### Batch

18. Add a new batch job to close a TNB program at the end of its recertification period if the recertification has not been completed.
19. CalSAWS Only: Modify an existing batch jobs to create TNB4 packet link in YBN.
20. CalSAWS Only: Modify an existing web service to create task and mark the form as received when TNB4 is submitted through YBN or Kofax.
21. ICT Document transfer – Add Code Category for the batch job that transfer image as part of the ICT process.

#### Fiscal

22. Update the issuance batch to enable the skipped issuance reasons for TNB.

#### Correspondence

23. C-IV Only: Create an automated task when the TNB 4 Recertification Packet is received.
24. Add a new TNB 4 Recertification packet to the Template Repository to be used with TNB programs. This packet will include the following forms:
  - a. TNB 4 – Notice of Recertification for TNB
  - b. CF 285 – CF Application (not part of the CF Recertification Packet)
25. Create a new batch job to send the TNB 4 Recertification packet to the customers when their RE is due.
26. Add logic to add a Barcode on the TNB 4 Recertification Packet when it is generated.
27. Add batch job to send TNB 5 if TNB 4 is still in 'Sent' status by the 15th of the last month of the recertification period.
28. Add functionality to generate TNB 5, along with CF 285 based on the incomplete reasons, from the Customer Reporting Detail page when the TNB 4 Recertification packet is marked "Incomplete".
29. Create a Custom Journal Entry Record when either TNB 4 Recertification Packet or TNB 5 form are generated from Online or Batch.
30. Add functionality to generate a approval NOA when the Recertification is approved.
31. Add TNB 2 – Notice of Approval for TNB to Template Repository.

#### CalWORKs and CalFresh - Re-Evaluation Process Job Aid

Joint design has been approved through the CalWORKs/CalFresh Committee. C-IV will implement this Change with SCR CA-205328 in the 20.03 release.

User would need to manually generate TNB 4 and send to client. If needed TNB 5 would need to be manually generated. EDBC would not automatically discontinue when appropriate, so user would need to either override the EDBC or use negative action. Manual notices would need to be generated by the user when required.

#### Outreach

##### Description:

##### Migration Impact

##### Description:

##### Migration Impact

##### Analysis:

##### Alternative

##### Procedure

##### Description:

**Operational Impact:**

**Estimate:** 3232

Automated Test :	0	Batch/Interfaces :	355	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	442	DBA :	0
DBA :	0	Eligibility :	325	Fiscal :	180
Imaging :	35	IVR/CC :	0	Online :	365
Performance :	0	Reports :	230	Security :	0
System Test Support :	575	Tech Arch :	50	Tech Ops :	0
Training :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change:  
N/A

2. ETC Change:  
Before:  
Translation Resource ETC: 11

After:  
Translation Resource ETC: 12

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:** 1. Recommendation Change:

Eligibility

1. Added specifications to Section 2.13.2.1 for setting the 'TNB Non Reporting' Reporting Type.
2. Added page behavior to the Program Configuration Override List page in Section 2.14.3.2 to allow the 'Transitional Nutrition Benefit' Reporting Type Reason to display when the 'TNB Non Reporting' Reporting Type is selected.
3. Updated language in Section 2.13.2.5 to clarify that authorization logic used to establish a new TNB Period is based on the 'RE' EDBC Run Reason and not the specific month processed.
4. LRS/CalSAWS Only: Removed condition in Section 2.13.2.12 to require the 'No SSI/SSP' Status Reason be established based on Change Reason logic. Assumption 5 was also added related to this point.
5. C-IV Only: Added a validation to the Accept button on the Nutrition Benefit EDBC Summary and Nutrition Benefit EDBC (Manual) pages. When processing a new redetermination period, this validation will prevent an active EDBC from being accepted unless the user has processed EDBC with the 'RE' Run Reason with some exceptions.

Online

6. Added clarification to Section 2.2.3.1.d to differentiate the Household Changes field behavior in the LRS/ CalSAWS versus C-IV systems.
7. Added language to Section 2.2.3.1.f.vi to specify when an 'Incomplete' versus 'Non Applicable' status should be set based on Completeness Determination question 1 through 3.
8. Corrected reference of "Figures from 2.1.1 and 2.1.2" to "Figures 2.3.1 and 2.3.2" in Section 2.3.1.
9. Deleted point "a. Update both the default search and the full search on this page. The default search runs when the user navigates to this page. The full search runs when the user clicks on the 'View' button on the page."
10. Added specification for Confirmation number that displays on YBN Confirmation page in Section 2.7.3.

Correspondence

11. Added Assumption 6 to indicate that the TNB 4 RE Packet will follow the same logic as the existing RE Packets if the Packet is received through Barcodes page.
12. Added Assumption 7 stating that 'no updates will be made to the population of the TNB 4 form in Template Repository'.

- 13. Added assumption 8 that NA BACK 9 will not be updated with this SCR.
- 14. C-IV Only: Updated the task creation frequency from "Real Time" to "Daily (Monday-Saturday) or Real Time" as the task will not be created real time if the document is received through C4Yorself.
- 15. Added a clarification to TNB 5 variable population in Section 2.29.2.
- 16. Added note to Section 2.29.3 clarifying that the TNB 5 Due\_Date is the same as the most recent TNB 4 RE Packet Due Date.
- 17. Added Section 2.33 to suppress the Benefit Change NOA: Suppress the following Benefit Change NOAs for TNB when TNB Recertification Approval Notice (TNB 2) generates.
  - C-IV: ACTN\_TNB3\_CHANGE
  - CalSAWS: TNB\_CH\_CHANGE\_IN\_HOUSEHOLD\_SIZE\_N103
  - CalSAWS: TNB\_CH\_FUNDING\_CHANGE\_N102

2. ETC Change:  
 Additional Translation Costs for C4Y  
 Before: Translation Resource ETC: 12  
 After: Translation Resource ETC: 19

Client Correspondence  
 Before: ETC Total: 442  
 After: ETC Total: 452

3. Release Change:  
 Before:  
 After:

4. Funding Source Change:  
 Before:  
 After:

**Content Revision  
 Status-3:  
 Content Revision  
 Description-3:**

1. Recommendation Change:  
 Before:  
 After:

2. ETC Change:  
 Before:  
 After:

3. Release Change:  
 Before:  
 After:

4. Funding Source Change:  
 Before:  
 After:

**Content Revision  
 Status-4:  
 Content Revision  
 Description-4:**

1. Recommendation Change:  
 Before:  
 After:

2. ETC Change:  
 Before:  
 After:

3. Release Change:  
 Before:  
 After:

4. Funding Source Change:

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Before:  
After: