CalSAWS

California Statewide Automated Welfare System

Design Document

CA-53785

DDID 1967 | DDCR 5014

ACL 08-07 - WPR is excluding Sanctioned cases with fewer than four sanctions in the 11 months prior to the benefit month

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sridhar Mullapudi
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/09/2020	1.0	Initial Draft	Sridhar Mullapudi

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1 OVERVIEW

Parents and caretaker adults are required to participate in Welfare-to-Work (WTW) or Refugee Employment Program (REP) activities to receive CalWORKs (CW) aid. Participation hours are monitored and verified by county staff on a monthly basis. The hours monitored for each assistance unit is required for federal data reporting purposes to calculate the Work Participation Rate (WPR).

Work eligible adults who do not comply with WTW or REP program requirements receive a sanction and are removed from the assistance unit in the CalWORKs program. For federal reporting on WPR, a sanctioned case is considered optional if the assistance unit is sanctioned for the month and had no more than 3 sanctions in the preceding 12-month period.

1.1 Current Design

LRS/CalSAWS:

When determining WPR, if a person is currently sanctioned, and there are fewer than four sanction time-track months for all persons in the program in the previous 11 months, the case will be considered optional to be included in the WPR report.

C-IV:

When determining WPR, if a person is currently sanctioned, and there are fewer than three sanction time-track months for all persons in the program in the previous 11 months, the case will be considered optional to be included in the WPR report.

1.2 Requests

Modify LRS/CalSAWS functionality according to ACL 18-70, ACL 15-64 and ACF Q&A dated 07.01.2012. WPR determination rules/logic will determine the assistance unit as optional in a sanctioned month if there are three or fewer sanctioned months over the preceding 12-month period.

1.3 Overview of Recommendations

1. Update WPR determination rules to determine the assistance unit as optional in a sanction month if there are three or fewer sanctioned months over the preceding 12-month period.

1.4 Assumptions

None

2 RECOMMENDATIONS

2.1 WPR Optional Determination update

2.1.1 Overview

When a work eligible member (WEI) of the assistance unit is sanctioned for WTW requirement in a CW program, during the WPR determination the assistance unit (AU) is marked as optional due to sanction if the case was marked sanctioned for WPR fewer than 3 months in the past 12 consecutive month period.

2.1.2 Description of Changes

1. Update the WPR determination logic to mark the case as optional due to WTW or REP sanction if both the following conditions are met:
    a. Work eligible adult is sanctioned for the benefit month.
    b. The AU has three or fewer sanctioned months over the preceding 12-month period.

    <u>Example:</u>
    A single parent and a child Active on CW program from 12/2018. Parent is sanctioned in the WTW program due to non-compliance with WTW program requirements as shown below.

    Note: When a work eligible adult is sanctioned for WTW program, a sanctioned time track is created in the system to track the months sanctioned for the adult.

Months	Dec 18	Jan 19	Feb 19	Mar 19	Apr-Sept 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20	Mar 20	Apr 20
Sanctioned	X					X	X	X		X	X	X

12/2018 benefit month: AU is marked as optional for WPR determination since single parent is sanctioned for 12/2018 and there are no sanctioned time tracks in the preceding 12-month period.

There are no sanctioned time tracks for the single parent from 01/2019 to 09/2019.

10/2019 benefit month: AU is marked as optional for WPR determination since, single parent is sanctioned for 10/2019 and there is only one sanctioned time track (12/2018) in the preceding 12-month period.

11/2019 benefit month: AU is marked as optional for WPR determination since single parent is sanctioned for 11/2019 and there are two sanctioned time tracks (12/2018, and 10/2019) in the preceding 12-month period.

12/2019 benefit month: AU is marked as optional for WPR determination since single parent is sanctioned for 12/2019 and there are two sanctioned time tracks (10/2019, and 11/2019) in the preceding 12-month period.

02/2020 benefit month: AU is marked as optional for WPR determination since single parent is sanctioned for 02/2020 and there are three sanctioned time tracks (10/2019, 11/2019, and 12/2019) in the preceding 12-month period.

03/2020 benefit month: AU is not marked as optional for WPR determination since there are four sanctioned time tracks (10/2019, 11/2019, 12/2019, and 02/2020) in the preceding 12-month period.

04/2020 benefit month: AU is not marked as optional for WPR determination since there are five sanctioned time tracks (10/2019, 11/2019, 12/2019, 02/2020, and 03/2020) in the preceding 12-month period.

Months	Dec 18	Jan 19	Feb 19	Mar 19	Apr-Sept 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20	Mar 20	Apr 20
Sanctioned	X					X	X	X		X	X	X
Optional in WPR due to WTW Sanction	OPTN					OPTN	OPTN	OPTN		OPTN		

2.1.3 Programs Impacted

WTW, REP

2.1.4 Performance Impacts

None

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The WPR determination logic is updated to mark the case as optional in a sanction month if there are three or fewer sanctioned months over the preceding 12-month period.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200404 | DDID 1967

Update the E2Lite Interface/WPR Sample Process to Handle Late Case Submissions

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Amy Gill, Dana Petersen, Avinda Bandaranayake

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/18/2020	.01	Initial Draft	Howard Suksanti
7/1/2020	.02	Updated based on QA review comments	Howard Suksanti
7/10/2020	0.3	Updated based on QA review comments	Avi Bandaranayake

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1 OVERVIEW

This SCR will update the E2Lite Interface/Work Participation Rate Determination (WPRD) to process late case submission.

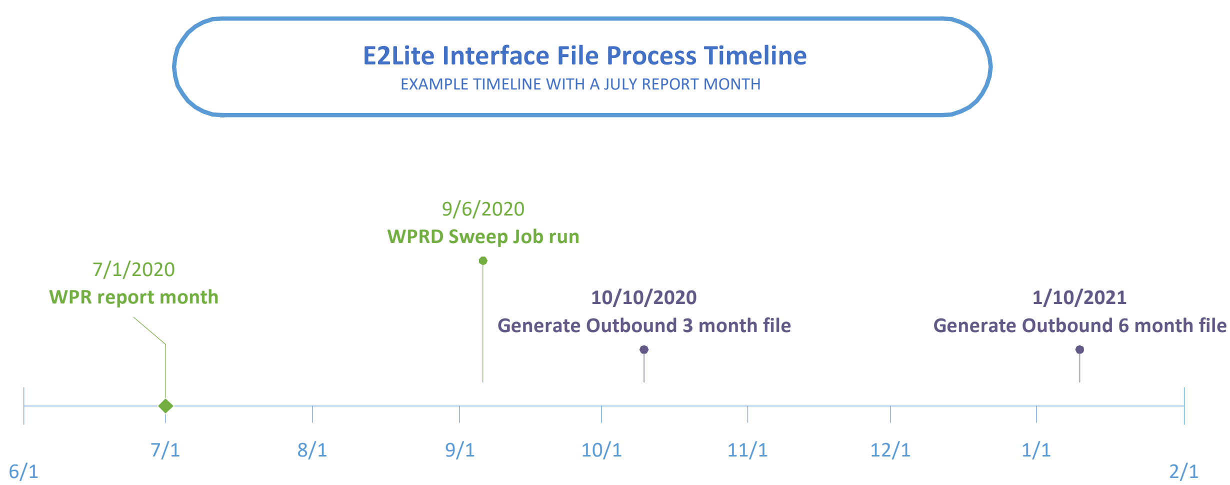
1.1 Current Design

For Counties that participate in the E2Lite Sample Automation, the WPRD batch jobs do not process sample records that are submitted by the County after the WPRD process has initiated for a given report month.

The following steps reflect the overall process of E2Lite Sample Automation:

1. County will upload an E2Lite skeleton file to the file server for the E2Lite Interface to pick up.
2. E2Lite Interface job (PIXXE901 – E2Lite Reader) will read the skeleton file and insert the sample cases into the CalSAWS System to prepare for the WPRD rule calculation.
3. On the sixth business day of the month, the WPRD Sweep job triggers WPRD for Work Eligible Individuals (WEI) as well as sample cases inserted by the E2Lite Interface job. WPRD is calculated for the report month that is 2 calendar months prior to the batch date. *Any sample cases submitted after this date are not processed automatically by the system*.
4. The Outbound Interface job will provide a file at 3 months (POXXE903 – E2Lite 3 month Outbound Writer) and 6 months (POXXE904 – E2Lite 6 month Outbound Writer) and upload the WPRD Sample file into the server for the County to receive the sample cases report.

The WPRD Sweep job runs monthly on the 6th calendar day of the month. For example, for WPRD report month of July 2020, the WPRD Sweep job runs on September 6, 2020. Any WPRD Sample case that is uploaded after September 6, 2020 will not be processed by E2Lite Automation for the July report month.



When the E2Lite inbound job loads a sample case into the System, the sample case is not visible to the worker on the WPR Sample Case page (PROC_IND = 'N') until WPRD rules process the sample case. Any record that is skipped from WPRD processing is not visible on the WPR Sample Case page.

The existing monthly job (PB00E902 – WPRD E2Lite Update) runs on the eighth of the month to set the PROC_IND value to 'Y' on any records that are not processed by WPRD so that unprocessed records will be visible on the WPR Sample Case page.

1.2 Requests

Modify the E2Lite Inbound job to process sample cases that are provided after the WPRD Sweep job runs for the report month.

1.3 Overview of Recommendations

1. Modify the E2Lite Inbound job to process sample cases that are provided after the WPRD Sweep job runs for the report month.
2. Modify the E2Lite Inbound job to set the indicator value to 'Y' on the WPRD sample record (PROC_IND) when the job detects any unprocessed records by WPRD processing deadline for the report month after the eighth of the month until the end of the month.

1.4 Assumptions

1. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted into the batch job.
2. The scheduling SCRs mentioned above will cover the opt in/out functionality and can be verified once implemented.
3. PB00E902 will continue to run to ensure original process is uninterrupted.
4. Any PROC_IND processing logic updates made for PB00E902 should be evaluated to see if the changes also need to be made for PIXXE901.

2 RECOMMENDATIONS

Modify the E2Lite Interface to process sample cases that are submitted after the WPRD Sweep job is run for the report month.

2.1 E2Lite Inbound job (PIXXE901)

2.1.1 Overview

Modify the E2Lite Inbound job (PIXXE901) to trigger WPRD on E2Lite sample cases that are submitted after the WPRD processing deadline for the report month.

The following is an existing validation that will be applied to the late case submission.

1. If the sample case already exists and it has not been processed by WPRD yet, the job will replace the sample case with the new data.
2. If the sample case already exists and it has already been processed by WPRD, the job will log an exception.
   <u>Exception Message</u>: SAMPLE: {sample case number} RPT_MONTH: {report month} could not be updated. Processed data already exists.

2.1.2 Description of Change

1. Modify the E2Lite Inbound job (PIXXE901) to insert a record into SYS_TRANSACT for each record provided in the inbound file to trigger WPRD on E2Lite sample cases when the following are true:
   - Batch run date is after the WPRD Sweep job scheduled for the report month.
   - The sample record has not been processed for the report month.

2. Modify the E2Lite Inbound job to set the indicator value to 'Y' on the WPRD sample record (PROC_IND) when the job detects any unprocessed records by WPRD for the report month after the eighth of the month until the end of the month. The E2Lite Inbound job will flip the PROC_IND status only on a record that was created prior to the E2Lite Inbound job run for the same report month.

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All counties.

2.1.6 Data Volume/Performance

N/A.

2.1.7 Failure Procedure/Operational Instructions

No Change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	E2Lite Interface will be modified to process late submission sample cases.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201968 | DDID 1967 | DDCR 4099

Add WTW Activity Attendance and Progress Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz, Farhat Ulain
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/10/2020	1.0	Initial Revision	Rainier Dela Cruz
07/27/2020	1.1	Updates from Deliverable and Build comments.	Rainier Dela Cruz
08/06/2020	1.2	Updates from Deliverable and Build comments.	Rainier Dela Cruz
08/19/2020	1.3	Updates from Deliverable and Build comments.	Farhat Ulain
08/20/2020	1.4	Added clarification for the dynamic section for the CSF 126.	Rainier Dela Cruz

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1 OVERVIEW

1.1 Current Design

In C-IV, the following forms are used to track progress of Welfare-to-Work (WTW) activities: WTW 733.4, WTW 735.2, WTW 753A, WTW 751.1 and the WEX 6. When the WTW 733.4, WTW 735.2, and WTW 753A forms are sent out, they are, in turn, tracked on the Employment Services Customer Reporting page. The page also tracks the completeness of the form when the form is returned by the recipient. The Employment Services Customer Reporting Report will pull information from the Employment Services Customer Reporting page and provide detailed information for WTW 733.4, WTW 735.2, and WTW 753A by status for a specified benefit month and county. There are also batch processes to automatically generate and send out the WTW 733.4 and 735.2 forms.

1.2 Requests

Migrate the existing forms, pages, and batch processes used in tracking WTW activities from C-IV to LRS/CalSAWS.

1.3 Overview of Recommendations

1. Add the new Generate Document Customer Activity table.
2. Create the CSF 124 form **Welfare-to-Work Program Attendance and Progress Report** based on the C-IV WTW 733.4 form.
3. Create the CSF 125 form **Welfare-to-Work School Attendance Report** based on the C-IV WTW 735.2 form.
4. Create the CSF 126 form **Travel Assistance Claim** based on the C-IV WTW 753A form.
5. Create the CSF 127 form **Return Travel Claim** based on the C-IV WTW 751.1 form.
6. Create the CSF 128 form **Subsidized WEX Time and Attendance Report** based on the C-IV WEX 6 form.
7. Migrate the automated batch process that is used to send out the WTW 733.4 and modify it to send out the CSF 124 form.
8. Migrate the automated batch process that sends out the WTW 735.2 and modify it to send out the CSF 125 form.
9. Migrate the Employment Services Customer Reporting List page.
10. Migrate the Employment Services Customer Reporting Detail page.
11. Migrate the Employment Services Monthly Productivity List Page.

1.4 Assumptions

1. The CSF 124, CSF 125, CSF 126, CSF 127, and CSF 128 forms will only be in English and Spanish.
2. The logic to retrieve the Business Reply Mail (BRM) address for the 57 Migration Counties will be implemented with SCR **CA-201214**. The population logic for

the WTW forms will use this logic to retrieve the BRM address and then will populate the field on the coversheet.

3. The migration of the Employment Services Customer Reporting report will be addressed with **DDID 1056**.
4. The existing LA County process of tracking the GN 6070, GN 6365, and GN 6008 forms will not be changed with this SCR. The forms will continue to be tracked from the 'Customer Reporting' pages. The shift from tracking these forms from the 'Customer Reporting' pages to the new 'Employment Services Customer Reporting' pages will be addressed by SCR **CA-218236**.
5. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted into the batch job.
6. The scheduling SCRs mentioned above will cover the opt in/out functionality for the CalWIN counties and can be verified once implemented.

2 RECOMMENDATIONS

2.1 Add the Generate Document Customer Activity Table

2.1.1 Overview

Currently in C-IV, when one of the forms used to track WTW activities is generated and saved, a record is inserted into the Generate Document Customer Activity table. The purpose of this table is to keep track of which form generated for a certain WTW activity and is used for page validation on the document parameters pages and driving queries for the automated batch processes defined in the later sections.

2.1.2 Description of Change

1. Create a new Generate Document Customer Activity table. The new table will contain at minimum the following data points:
    a. Generate Document Id – This is the Generate Document Id of the generated form.
    b. Customer Activity Id – This is the Customer Activity Id of the WTW activity for which the form is generated for.

    Technical Note: It is at the developer's discretion to add additional data points and data constraints as necessary to accommodate the functional and technical needs of this table.

2. Update the forms save logic to create a record in the table when the CSF 124, CSF 125, or CSF 126 is generated and saved from Template Repository (saved and printed locally or saved and printed centrally).
    a. The Generate Doc Id will be the Generate Doc Id of the form that was saved.

   b. The Customer Activity Id will be the Id of the activity selected from the Document Parameter page.
   c. When the CSF 126 is generated from Template Repository, multiple activities can be selected for the report month. A record will be created for each activity and will be associated to the same Generate Doc Id.

3. Update the Forms Generation job to create a record in the table when the CSF 124 or CSF 125 is generated through the automated batch process.
   a. The Generate Doc Id will be the Generate Doc Id of the form that was generated.
   b. The Customer Activity Id will be the Id of the activity that was returned by the driving query.

2.2 Add the CSF 124 Form

2.2.1 Overview

Add the CSF 124 form to LRS/CalSAWS Template Repository.

Form: CSF 124 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.2.2 Description of Change

1. Create the CSF 124 form. This form is based off the C-IV WTW 733.4 form. It will have a coversheet, with the BRM address on the second page. The form will have four impressions.

   Form Header: Please refer to **Section 3.0 Supporting Document #1**
   Form Footer: Please refer to **Section 3.0 Supporting Document #1**
   Form Title: Welfare-to-Work Program Attendance and Progress Report
   Form Number: CSF 124
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #1**

2. Add the CSF 124 form to Template Repository.

a. Create a new Document Parameters page with the following required parameters that will be used to generate the CSF 124 form:

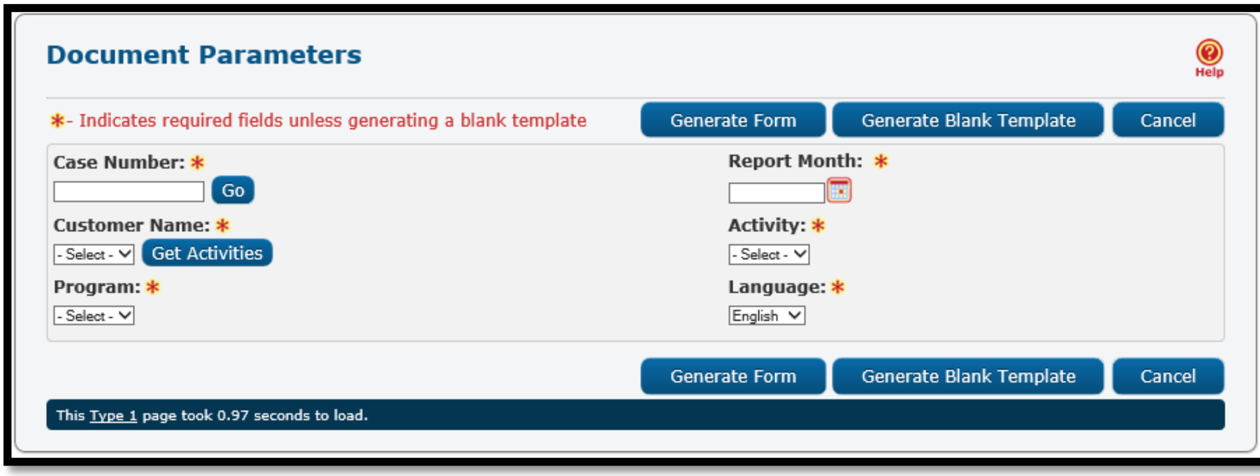

Figure 2.2.1 – Document Parameters Page

Document Parameter	Value
Case Number	The case number for the case which the user wants to generate the form for.
Report Month	The report month (MM/YYYY) the user is generating for.
Customer Name	The dropdown contains the names of the persons.
Activity	The dropdown with a list of WTW activities link to the person selected in the Customer Name dropdown for the report month. The dropdown values will be in the following format: [Activity Type] [Start Date] – [End Date]. **Note:** When generating the CSF 124, only one activity can be selected from the dropdown.
Program	The dropdown contains the list of programs.
Language	The dropdown contains the list of languages the form can be generated in.

b. Add 'Get Activities' button on the Document Parameters page. When clicked, the logic will populate the Activity dropdown based on the Case, Report Month, and Customer Name selected.

c. Add the following validations to the Document Parameters page.
   i. Display the following validation message when the 'Get Activities' button is clicked and either the Report Month is not filled in or the Customer Name is not selected: 'Customer Name and Report Month must be selected before retrieving activities.'
   ii. Display the following validation message when the user attempts to generate the form for the same month, language, customer, and activity, when there is one already generated: '<FormNumber> has been sent for this Report Month, activity, and language. Please reprint if another is needed.' <Form Name> is a variable that will be populated with the form number.

d. This form will only be available to the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 124 – Page 1, Page 3	**County Name**	This field will be populated with the county name.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CSF 124 – Page 1, Page 3	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 124 – Page 1, Page 3	**Case Number**	This field will be populated with the case number of the current case.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y	Y
CSF 124 – Page 1, Page 3	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 124 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y	Y
CSF 124 – Page 3, Page 4	**Activity Type**	When generated from the Template Repository, it is the activity type of the activity selected on the Document Parameters page. When generated through batch, it is the activity type of the activity returned by the driving query.	Y	Y	Y
CSF 124 – Page 3, Page 4	**Activity Id**	When generated from the Template Repository, it is the activity Id of the activity selected on the Document Parameters page. When generated through batch, it is the activity Id of the activity returned by the driving query.	Y	Y	Y
CSF 124 – Page 3, Page 4	**Provider**	When generated from the Template Repository, it is	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		the provider associated to the activity selected on the Document Parameters page. When generated through batch, it is the provider associated to the activity returned by the driving query.			
CSF 124 – Page 3, Page 4	**Phone Number**	When generated from the Template Repository, it is the phone number associated to the activity selected on the Document Parameters page. When generated through batch, it is the phone number associated to the activity returned by the driving query.	Y	Y	Y
CSF 124 – Page 3, Page 4	**Month/Year**	When generated from the Template Repository, it is the report month on the Document	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Parameters page. When generated through batch, it is the batch month.			

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	When generated through the batch process, the WTW Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

7. Create an Employment Services Customer Reporting entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 124
Report Month	The report month.

Name	The customer name.
Type	CSF 124 **Technical Note:** The code num identifier use in C-IV is 'WPA' and is currently available in LRS/CalSAWS.
Provider	The provider associated to the activity.
Status	Employment Services Customer Reporting Status Employment Services Customer Reporting Statuses: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error For example: The status will be set to "Sent" if the form is generated and sent to the recipient through Batch.
Status Date	The date of the latest (and/or most) recent status.

8. Create a Journal entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 124
Case Id	The case Id of the current case.
Type	Document
Category	All
Short Description	CSF 124
Long Description	The CSF 124 was sent for the month of [Report Month (MM/YYYY)] for [Activity Type] – [Activity Number] at [Provider Name].
Created by	User or batch
Updated by	User or batch

2.3 Add the CSF 125 Form

2.3.1 Overview

Add the CSF 125 form to LRS/CalSAWS Template Repository.

Form: CSF 125 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.3.2 Description of Change

1. Create the CSF 125 form based off the WTW 735.2 form. The form will have a coversheet, with the BRM address on the second page. The form will have four impressions.

   Form Header: Please refer to **Section 3.0 Supporting Document #2**
   Form Footer: Please refer to **Section 3.0 Supporting Document #2**
   Form Title: Welfare-to-Work School Attendance Report
   Form Number: CSF 125
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #2**

2. Add the CSF 125 form to Template Repository.
   a. It will use the Document Parameters page defined in **Section 2.2.2.2.**
      Note: When generating the CSF 125, only one activity can be selected from the dropdown.

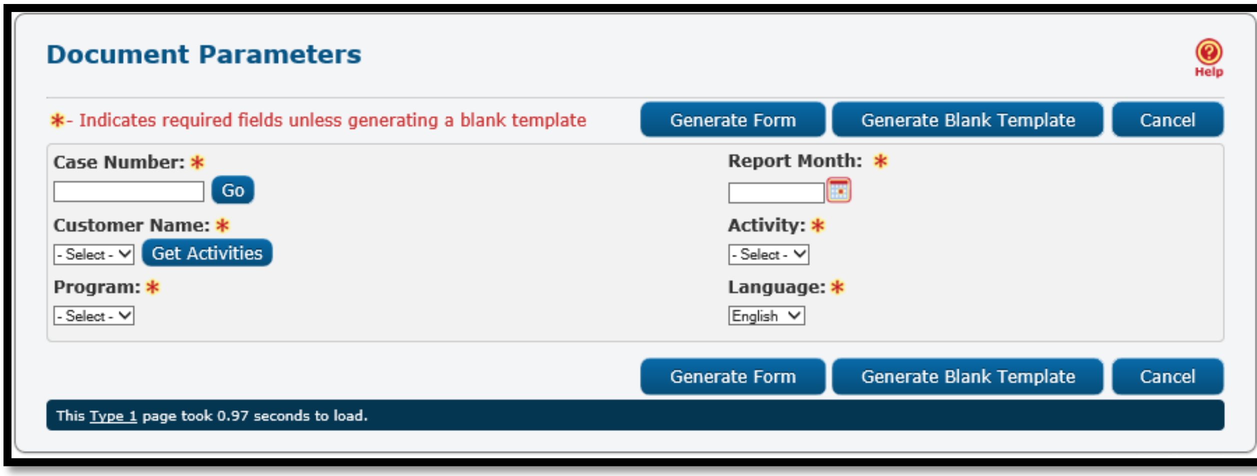

Figure 2.2.1 – Document Parameters Page

b. This form will only be available to the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 125 – Page 1, Page 3	**County Name**	This field will be populated with the county name.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Office Address**	This field will be populated with the office address of the worker assigned.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CSF 125 – Page 1, Page 3	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 125 – Page 1, Page 3	**Case Number**	This field will be populated with the case number of the current case.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y	Y
CSF 125 – Page 1, Page 3	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 125 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y	Y
CSF 125 – Page 3	**Activity Type**	When generated from the Template Repository, it is the activity type associated to the activity selected on the Document Parameters page. When generated through batch, it is the activity type associated to the activity returned by the driving query.	Y	Y	Y
CSF 125 – Page 3	**Activity Id**	When generated from the Template Repository, it is the activity Id associated to the activity selected on the Document Parameters page. When generated through batch, it is the activity Id associated to the activity returned by the driving query.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 125 – Page 3	**School-Provider**	When generated from the Template Repository, it is the school provider associated to the activity selected on the Document Parameters page. When generated through batch, it is the school provider associated to the activity returned by the driving query.	Y	Y	Y
CSF 125 – Page 3	**Report Month**	When generated from the Template Repository, it is the report month on the Document Parameters page. When generated through batch, it is the batch month.	Y	Y	Y
CSF 125 – Page 3, Page 4	**Attendance Date**	Each row of the column will be populated with days of the report month. For example, if the report month is 07/2020, the first	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		row will be 07/01/2020 and the last row will be 07/31/2020.			

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	When generated through the batch process, the WTW Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

7. Create an Employment Services Customer Reporting entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 125
Report Month	The report month.
Name	The customer name.

Type	CSF 125 **Technical Note:** The code num identifier use in C-IV is 'WSA' and is currently available in LRS/CalSAWS.
Provider	The provider associated to the activity.
Status	Employment Services Customer Reporting Status Employment Services Customer Reporting Statuses: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error For example: The status will be set to "Sent" if the form is generated and sent to the recipient through Batch.
Status Date	The date of the latest (and/or most) recent status.

8. Create a Journal entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 125
Case Id	The case Id of the current case.
Type	Document
Category	All
Short Description	CSF 125
Long Description	The CSF 125 was sent for the month of [Report Month (MM/YYYY)] for [Activity Type] – [Activity Number] at [Provider Name].
Created by	User or batch
Updated by	User or batch

2.4 Add the CSF 126 Form

2.4.1 Overview

Add the CSF 126 form to LRS/CalSAWS Template Repository.

Form: CSF 126 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.4.2 Description of Change

1. Create the CSF 126 form based of the WTW 753A form. The form will have a coversheet, with the BRM address on the second page. The form will have four impressions.

   Form Header: Please refer to **Section 3.0 Supporting Document #3**
   Form Footer: Please refer to **Section 3.0 Supporting Document #3**
   Form Title: Travel Assistance Claim
   Form Number: CSF 126
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #3**

2. Add the CSF 126 form to Template Repository.
   a. Create a new Document Parameters page with the following required parameters:

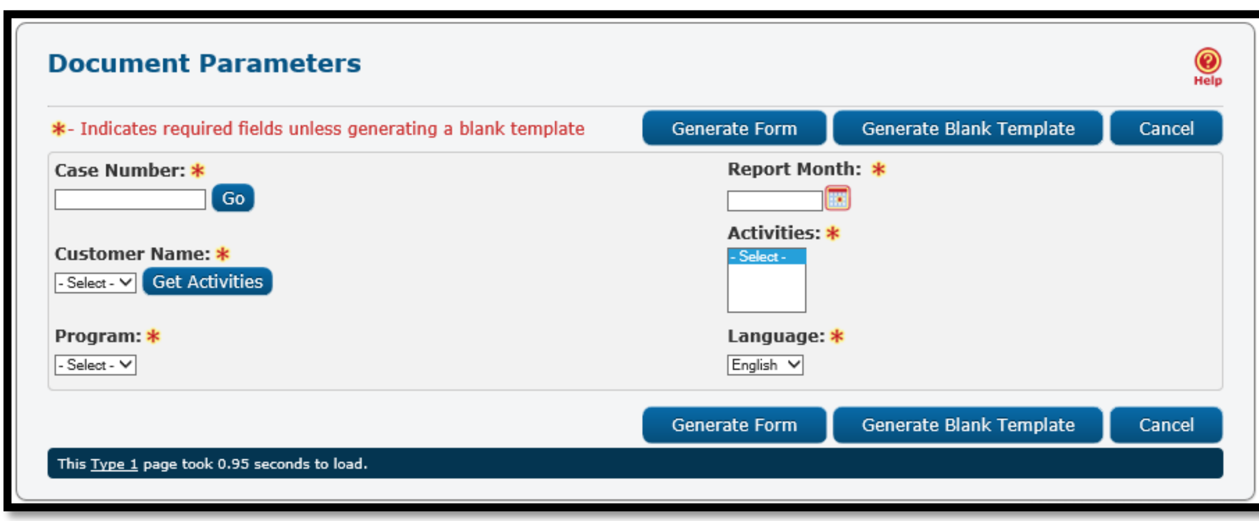

Figure 2.4.1 – Document Parameters Page

Document Parameter	Value
Case Number	The case number for the case which the user wants to generate the form for.
Report Month	The report month the user is generating for.
Customer Name	The dropdown contains the names of the persons.
Activities	The list of WTW activities link to the person selected in the Customer Name dropdown for the report month. The values will be in the following format: [Activity Type] [Start Date] – [End Date]. **Note:** Multiple activities can be selected when generating the CSF 126.
Program	The dropdown contains the list of programs.
Language	The dropdown contains the list of languages the form can be generated in.

b. Add ‘Get Activities’ button on the Document Parameters page. When clicked, the logic will populate the Activity dropdown based on the Case, Report Month, and Customer Name selected.

c. Add the following validations to the Document Parameters page.

   i. Display the following validation message when the ‘Get Activities’ button is clicked and either the Report Month is not filled in or the Customer Name is not selected: ‘Customer Name and Report Month must be selected before retrieving activities.’

   ii. Display the following validation message when the user attempts to generate the form for the same month, language, customer, and activity, when there is one already generated: ‘<FormNumber> has been sent for this Report Month, activity, and language. Please reprint if another is needed.’ <FormNumber> is a variable that will be populated with the form number.

d. This form will only be available to the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 126 – Page 1, Page 3	**County Name**	This field will be populated with the county name.	Y	Y
CSF 126 – Page 1, Page 3	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y
CSF 126 – Page 1, Page 3	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y
CSF 126 – Page 1, Page 3	**Case Name**	This field will be populated with the case name of the current case.	Y	Y
CSF 126 – Page 1, Page 3	**Case Number**	This field will be populated with the case number of the current case.	Y	Y
CSF 126 – Page 1, Page 3	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y
CSF 126 – Page 1, Page 3	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y
CSF 126 – Page 1, Page 3	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
		have the following format: (###) ###-####		
CSF 126 – Page 1, Page 3	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y
CSF 126 – Page 1, Page 3	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y
CSF 126 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y
CSF 126 – Page 3, Section 2	**Activity**	The field will be populated with the activity number. If there is no activity number, it will be the activity type.	Y	Y
CSF 126 – Page 3, Section 2	**Activity Site Name**	The field will be populated with the provider associated with the activity.	Y	Y
CSF 126 – Page 3, Section 2	**Activity Site Address**	The field will be populated with the address of the provider associated with the activity.	Y	Y
CSF 126 – Page 3, Section 2	**City**	The field will be populated with the city of the provider associated with the activity.	Y	Y
CSF 126 – Page 3, Section 2	**Zip Code**	The field will be populated with the zip code of the	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
		provider associated with the activity.		
CSF 126 – Page 3, Section 3	**Date**	Each row of the column will be populated with days of the report month. For example, if the report month is 07/2020, the first row will be 07/01/2020 and the last row will be 07/31/2020.	Y	Y

a. 'Section 2: Activity Information' will be a dynamic section. The section will initially accommodate four activities. When there are more than four activities, the section will repeat to accommodate the remaining activities. For example, if there are seven activities, the initial section will populate with four activities, the section will repeat, and populate the remaining three activities in the repeated section.
b. 'Section 3: Activity Attendance' will be a dynamic section. The section will initially accommodate four activities. When there are more than four activities, the section will repeat to accommodate the remaining activities. The section will also have rows for each day of the month. For example, if there are seven activities, the initial section will populate with four activities, the section will repeat, and populate the remaining three activities in the repeated section. If there are 31 days in a month, it will have 31 rows.

Note: Section 2 and Section 3 will repeat 3 times and will only accommodate 12 activities.

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central

Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

7. Create an Employment Services Customer Reporting entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 126
Report Month	The report month.
Name	The customer name.
Type	CSF 126 **Technical Note:** The code num identifier use in C-IV is 'WTA' and is currently available in LRS/CalSAWS.
Provider	The provider associated to the activity.
Status	Employment Services Customer Reporting Status Employment Services Customer Reporting Statuses: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error

Field to Populate	Population for CSF 126
	For example: The status will be set to “Sent” if the form is generated and sent to the recipient through Batch.
Status Date	The date of the latest (and/or most) recent status.

a. When the CSF 126 is generated from Template Repository, multiple activities can be selected for the report month. In that scenario, an Employment Services Customer Reporting entries will be created for each activity.

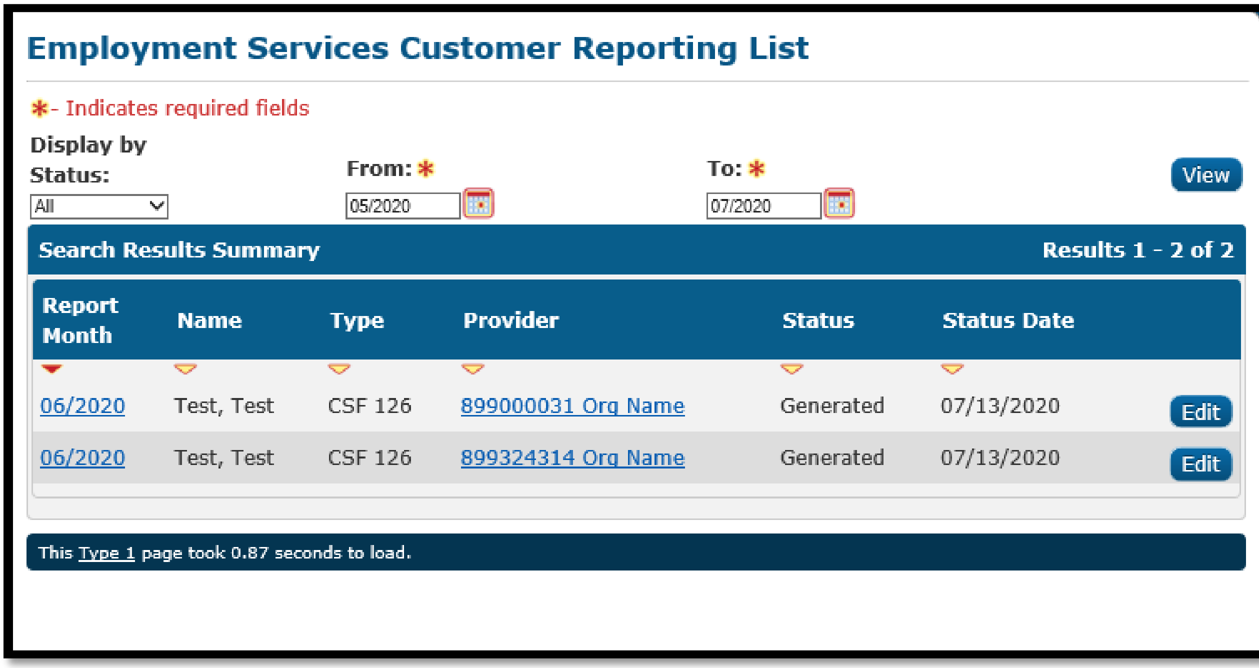

Figure 2.4.2 – Employment Services Customer Reporting List Page

8. Create a Journal entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 126
Case Id	The case Id of the current case.
Type	Document
Category	All
Short Description	CSF 126
Long Description	The CSF 126 was sent for the month of [Report Month (MM/YYYY)].
Created by	User
Updated by	User

2.5 Add the CSF 127 Form

2.5.1 Overview

Add the CSF 127 form to LRS/CalSAWS Template Repository.

Form: CSF 127 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.5.2 Description of Change

1. Create the CSF 127 form based off the 751.1 form. The form will have two impressions and have the BRM address on the second page.

   Form Header: Please refer to **Section 3.0 Supporting Document #4**
   Form Footer: Please refer to **Section 3.0 Supporting Document #4**
   Form Title: Return Travel Claim
   Form Number: CSF 127
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #4**

2. Add the CSF 127 form to Template Repository.
   a. The following parameters will be required:

      Required Form Input: Case Number, Customer Name, Program, Language

Figure 2.5.1 – Document Parameters Page

b. This form will only be available for the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 127 – Page 1	**County Name**	This field will be populated with the county name.	Y	Y
CSF 127 – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y
CSF 127 – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y
CSF 127 – Page 1	**Case Name**	This field will be populated with the case name of the current case.	Y	Y
CSF 127 – Page 1	**Case Number**	This field will be populated with the case number of the current case.	Y	Y
CSF 127 – Page 1	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y
CSF 127 – Page 1	**Worker ID**	This field will be populated with	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
		the Id of the worker assigned to the program.		
CSF 127 – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y
CSF 127 – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y
CSF 127 – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y
CSF 127 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	The individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

2.6 Add the CSF 128 Form

2.6.1 Overview

Add the CSF 128 form to LRS/CalSAWS Template Repository.

Form: CSF 128 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English

2.6.2 Description of Change

1. Create the CSF 128 form based on the WEX 6 form. The form will have one impression.

   Form Header: Please refer to **Section 3.0 Supporting Document #5**
   Form Footer: Please refer to **Section 3.0 Supporting Document #5**
   Form Title: Subsidized WEX Time and Attendance Report
   Form Number: CSF 128
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #5**

2. Add the CSF 128 form to Template Repository.
   a. The following parameters will be required:

      Required Form Input: Case Number, Customer Name, Program, Language

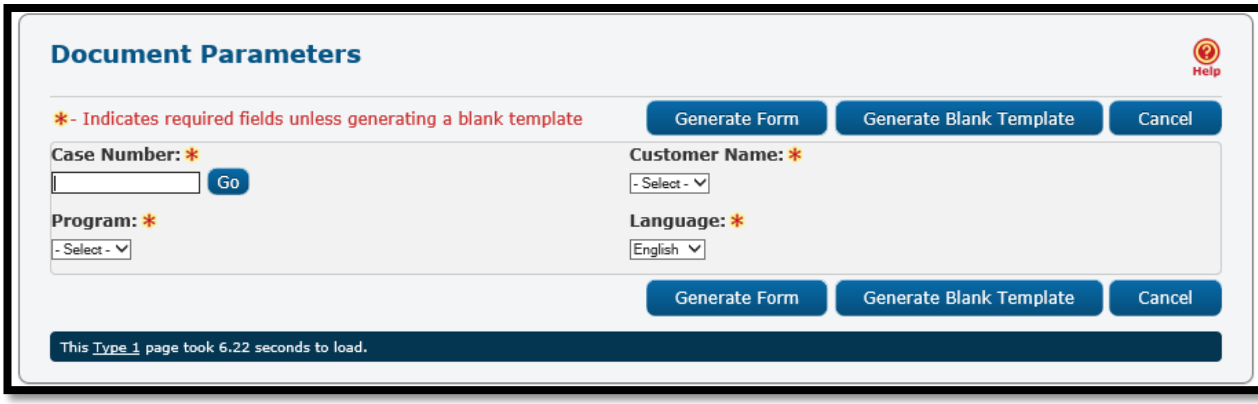

Figure 2.6.1 – Document Parameters Page

b. This form will only be available for the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 128 – Page 1	**County Name**	This field will be populated with the county name.	Y	Y
CSF 128 – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y
CSF 128 – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y
CSF 128 – Page 1	**Case Name**	This field will be populated with the case name of the current case.	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 128 – Page 1	**Case Number**	This field will be populated with the case number of the current case.	Y	Y
CSF 128 – Page 1	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y
CSF 128 – Page 1	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y
CSF 128 – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y
CSF 128 – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y
CSF 128 – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	The individual selected on the 'Case Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	N/A

2.7 Migrate the WTW 733.4 Batch Job

2.7.1 Overview

The C-IV WTW 733.4 batch job (JB00R545) is a daily batch job responsible for finding WTW participants that have ongoing Work Participation Rate (WPR) Community Service activities that need to be sent a WTW 733.4. Migrate the batch job and modify it to send out the new CSF 124 form and to include the 'Good Cause' status.

2.7.2 Description of Change

1. Migrate the C-IV WTW 733.4 batch job. The batch job will be modified to send the CSF 124 form and to include the 'Good Cause' status. The driving query will find cases that have a WTW program that are Active or in Good Cause status, where the primary applicant has an ongoing 'Community Service' activity for the report month (the batch month falls within the begin and end date for the activity). If the WTW primary applicant has multiple Community Services activities for the report month, the CSF 124 form will generate for each one. If the activity spans multiple months, the form will generate for each report month.

For example, if there is an activity spans July and August, when the batch runs in July, it will generate a CSF 124. When the batch runs again in August, it will generate another one.

2. If there is a CSF 124 already generated for the same person, activity, report month and language, the driving query will not insert a record in the system transaction table.

3. Since this is a daily batch, if the batch date is within 10 calendar days of the following month, the CSF 124 form will also be generated for the following report month, if the activity is still ongoing for that month. For example, when the batch runs after 10 day in July and picks up a new activity that spans July and August, the batch job will pick up the case and generate the CSF 124 for both the July and August report months. When the batch runs after 10 day in July and picks a new activity that ends in July, the batch job will pick up the case and generate the CSF 124 for only the July report month.

4. For each record returned from the driving query, insert a record into the system transaction and system transaction detail tables.
    a. Insert the following transactional values in the system transaction table:

Column to Populate	Population for CSF 124
Case Id	The Id of the case associated to the WTW program.
Program Id	The Id of the active WTW program.
Person Id	The primary applicant of the WTW program.
Type Code	FR
Sub Type Code	The current sub type code used in C-IV is 'WPA' and it currently available in LRS/CalSAWS. However, if the WPA sub type code is not available at the time of implementation, the logic will need to be updated to support a new sub type code.
Effective Date	The report month.

    b. Insert the following transactional values in the system transaction detail table:

Column to Populate	Population for CSF 124
Column Name	CUST_ACTIV_ID

Column to Populate	Population for CSF 124
Column Value	The Id of the activity returned by the driving query.

2.7.3 Execution Frequency

This batch job will run daily.

2.7.4 Key Scheduling Dependencies

This job will run before the Forms Balancer job.

2.7.5 Counties Impacted

This job will run for the following counties: Alpine (02), Colusa (06), Del Norte (08), Inyo (14), Kings (16), Lassen (18), Mariposa (22), Mono (26), Nevada (29), Plumas (32), San Bernardino (36), Sierra (46), Siskiyou (47), Sutter (51), Tuolumne (55), and Yuba (58).

Note: The list of counties above are the current counties opted into the process in C-IV.

2.7.6 Data Volume/Performance

Approximately 1,600 records are processed monthly in C-IV. Please note that this is an approximation and this number may vary.

2.7.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.8 Migrate the WTW 735.2 Batch Job

2.8.1 Overview

The C-IV WTW 735.2 batch job (JB00R546) is a daily batch job responsible for finding WTW participants that have one of the following ongoing WPR activities: Education – Empl, Job Skills Training – Empl, and Voc/Ed Training that needs to be sent a WTW 735.2. Migrate the batch job and modify it to send out the new CSF 125 form and include the 'Good Cause' status.

2.8.2 Description of Change

1. Migrate the C-IV WTW 735.2 batch job. The batch job will be modified to send the CSF 125 form and include the 'Good Cause' status. The driving query will find cases that have a WTW program that is Active or in Good Cause status, where the primary applicant has one of the following ongoing WPR activities: Education – Empl, Job Skills Training – Empl, and Voc/Ed Training for the report month (the batch month falls within the begin and end date for the activity). If the WTW primary applicant has multiple activities for the report month, the CSF 125 form will generate for each one.

2. If there is a CSF 125 already generated for the same person, activity, report month and language, the driving query will not insert a record in the system transaction table.

3. Since this is a daily batch, if the batch date is within 10 calendar days of the following month, the CSF 125 form will also be generated for the following report month, if the activity is still ongoing for that month.

4. For each record returned from the driving query, insert a record into the system transaction and system transaction detail tables.
    a. Insert the following transactional values in the system transaction table:

Column to Populate	Population for CSF 125
Case Id	The Id of the case associated to the WTW program.
Program Id	The Id of the active WTW program.
Person Id	The primary applicant of the WTW program.
Type Code	FR
Sub Type Code	The current sub type code used in C-IV is 'WSA' and is currently available in LRS/CalSAWS. However, if the WSA sub type code is not available at the time of implementation, the logic will need to be updated to support a new sub type code.
Effective Date	The report month.

    b. Insert the following transactional values in the system transaction detail table:

Column to Populate	Population for CSF 125
Column Name	CUST_ACTIV_ID

Column to Populate	Population for CSF 125
Column Value	The Id of the activity returned by the driving query.

2.8.3 Execution Frequency

This batch job will run daily.

2.8.4 Key Scheduling Dependencies

This job will run before the Forms Balancer job.

2.8.5 Counties Impacted

The job will run for the following counties: Alpine (02), Colusa (06), Del Norte (08), Inyo (14), Kings (16), Lassen (18), Mariposa (22), Mono (26), Nevada (29), Plumas (32), San Bernardino (36), Sierra (46), Siskiyou (47), Sutter (51), Tuolumne (55), and Yuba (58).

Note: The list of counties above are the current counties opted into the process in C-IV.

2.8.6 Data Volume/Performance

Approximately 5,900 records are processed monthly in C-IV. Please note that this is an approximation and this number may vary.

2.8.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.9 Employment Services Customer Reporting List

2.9.1 Overview

Migrate the 'Employment Services Customer Reporting List' page from C-IV to LRS/CalSAWS. This page will be available under Employment Services-Global Navigation, Reporting-Local Navigation, and Customer Reporting-Task Navigation.

2.9.2 Reporting-Local Navigation Mockup

Figure 2.9.2-1 – Reporting-Local Navigation

2.9.3 Customer Reporting-Task Navigation Mockup

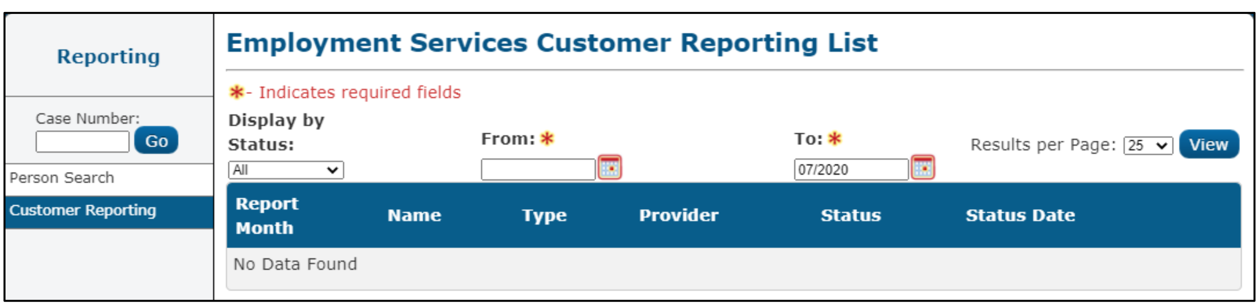

Figure 2.9.3-1 – Customer Reporting-Task Navigation

2.9.4 Employment Services Customer Reporting List Mockup

Figure 2.9.4-1 – Employment Services Customer Reporting List Page

2.9.5 Description of Change

1. Create/Migrate a new page 'Employment Services Customer Reporting List' page in LRS/CalSAWS from C-IV.
2. The list of Forms that can be displayed on the page are as follows:
   i. CSF 124
   ii. CSF 125
   iii. CSF 126
3. This new page will be accessed within the context of a case in Employment Services-Global Navigation, Reporting-Local Navigation and Customer Reporting-Task Navigation.
4. Add 'Reporting' in the Employment Services-Local Navigation below 'Case Summary'.
5. Add 'Customer Reporting' and 'Person Search' in the Reporting-Task Navigation. Note: If a user is not in the context of a case, 'Customer Reporting' option under Task navigation will not be displayed, only 'Person Search' will be displayed.
6. Default sort of this page will be by Report Month in descending order. See field level description of Employment Services Customer Reporting List page.

Field Name	Description	Required
Display by Status	This field displays the status of the report. This field will be defaulted to	No

	'All' when user first navigates to the page. Field dropdown values will be as follows: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error	
Date Range – From	This field displays the date range user selects formatted as mm/yyyy. Note: As a default, From field will be set to 2 months prior to the current month. When accessed from 'Monthly Productivity List' page via a hyperlink, From field will be set to the selected month.	Yes Validate when clicking on View button.
Date Range – To	This field displays the date range user selects formatted as mm/yyyy. Note: As a default, this field will be set to the current month.	Yes Validate when clicking on View button.
View – Button	When clicking this button, Search Results Summary section will display the results.	No
Report Month	This column displays the report month when the form is last updated. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the Employment Services	

	Customer Reporting Detail page.	
Name	This column displays the name of the person formatted as <Last Name>, <First Name> <Age><Gender Initial>. This is a text field.	
Type	This field displays the Form number.	
Provider	This field displays the name of the provider printed on the form. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the existing Resource Detail page for the Provider.	
Status	This field displays the status of the form.	
Status Date	This field displays the date when the Report status was last updated formatted as mm//dd/yyyy.	
Edit-Button	When clicking on this button, user will be navigated to the Employment Services Customer Reporting Detail page in Edit mode.	

2.9.6 Page Location

- **Global:** Employment Services
- **Local:** Reporting
- **Task:** Customer Reporting

2.9.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer Reporting List Page.	Employment Services Reporting View
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer Reporting List Page.	Employment Services Reporting Edit
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer Reporting List Page.	Employment Services Monthly Productivity View
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer	Employment Services Monthly Productivity Edit

Security Right	Right Description	Right to Group Mapping
	Reporting List Page.	

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Employment Services Reporting View	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix
Employment Services Reporting Edit	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix Document
Employment Services Monthly Productivity View	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix Document
Employment Services Monthly Productivity Edit	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix

2.9.8 Page Mapping

PMCR for the fields on the new page.

2.9.9 Page Usage/Data Volume Impacts

N/A

2.10 Employment Services Customer Reporting Detail

2.10.1 Overview

Migrate the Employment Services Customer Reporting Detail page from C-IV to LRS/CalSAWS. This page will be accessed from the Report Month hyperlink on the Employment Services Customer Reporting List page.

2.10.2 Employment Services Customer Reporting Detail Mockup

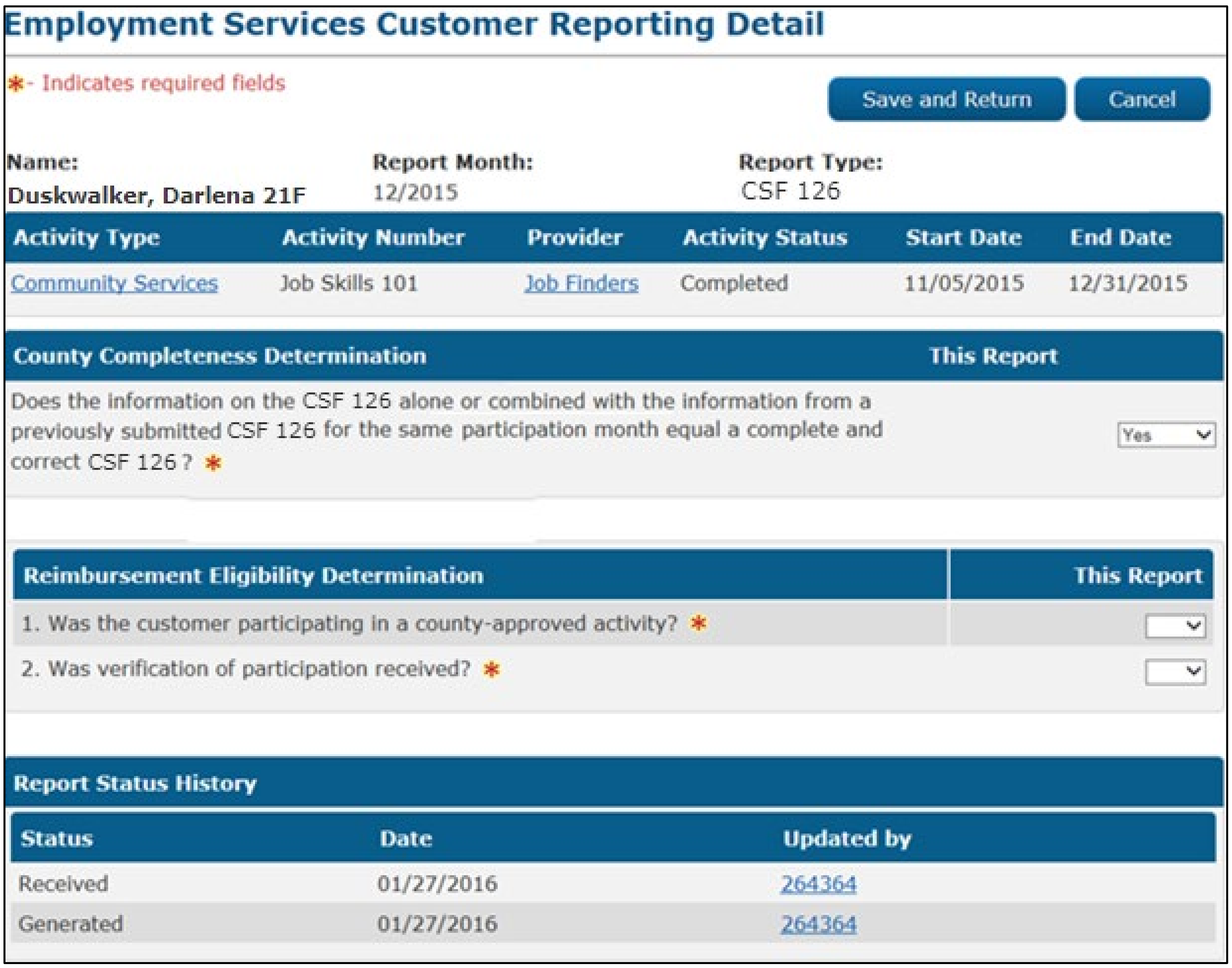

Figure 2.10.2-1 – Employment Services Customer Reporting Detail Page

2.10.3 Description of Change

1. Create/Migrate a new page 'Employment Services Customer Reporting Detail' page in LRS/CalSAWS from C-IV.
2. The list of Forms that can be displayed on the page are as follows:
   i. CSF 124
   ii. CSF 125
   iii. CSF 126

3. This new page will be accessed from the Report Month hyperlink on the Employment Services Customer Reporting List page.
4. The 'Activity Type' hyperlink on Employment Services Customer Reporting Detail page will navigate the user to the existing Activity Detail page.
5. The 'Provider' hyperlink on Employment Services Customer Reporting Detail page will navigate the user to the existing Provider Detail page.
6. The 'Updated by' hyperlink on Employment Services Customer Reporting Detail page will navigate the user to the Worker Detail page.
7. A question will be displayed in 'County Completeness Determination' section of the Employment Services Customer Reporting Detail page; 'Does the information on the <FormName> alone or combined with the information from a previously submitted <FormName> for the same participation month equal a complete and correct <FormName>' with a select option in front of it.
    a. If 'Yes' is selected in 'This Report' dropdown field, the Reimbursement Eligibility Determination questions will be displayed.
        i. 'Was the customer participating in a county-approved activity?'. This question will have the values 'Yes' and 'No' in 'This Report' dropdown field.
        ii. 'Was verification of participation received?' This question will have the values 'Yes' and 'No' in 'This Report' dropdown field.
8. When a CSF 126 Completeness Determination question is marked 'No', a CSF 127 **Return Travel Claim** form will pop up for the worker to complete upon clicking the 'Save and Return' button.
9. If 'N/A' is selected in 'This Report' dropdown field, it will indicate that the report is voided. A worker will be able to create a new form manually.
10. Add a validation when clicking Save and Return to not allow the user to change the status of the report if another form is printed for the month, unless the status other form is marked N/A.
    "Cannot change this report because another valid report exists for the month."
11. Clicking on 'Cancel' cannot change the report because another valid report exists for the month.

Based on the answers selected in 'County Completeness Determination' section and 'Reimbursement Eligibility Determination section' and upon clicking the 'Save and Return' button, the new status of the report will be displayed in the 'Status' field of 'Report Status History' section of the page. The new status will be determined as follows:

Condition	New Status

County Completeness Determination question = 'N/A'	Not Applicable
County Completeness Determination question = 'No'	Incomplete
County Completeness Determination question = 'Yes' All Reimbursement Eligibility question = 'Yes'	Complete
County Completeness Determination question = 'Yes' All Reimbursement Eligibility question = 'No'	Denied

The status will also be changed as the result of the following external events.

Event	New Status
Report is generated	Generated
Report is generated through batch or Save/Print Central from Template Repository and mailed by the batch central print process	Sent
The barcode is scanned	Received
Central Print Fails	Error

See field level description of the Employment Services Customer Reporting Detail page.

Field Name	Description	Required
Name	This field will display the name of the person formatted as<Last Name>, <First Name> <Age><Gender Initial>. This is a text field.	No
Report Month	This field will display the report month. This is a text field.	No
Report Type	This field will display the title of the form. This is a text field.	No
Activity Type	This field will display the title of the activity. Description provided above.	No

Activity Number	This field will display the number of the activity. This is a text field.	No
Provider	This field will display the name of the provider. Description provided above.	No
Activity Status	This field will display the status of the activity. This is a text field.	No
Start Date	This field will display the start date of the activity. This is a text field.	No
End Date	This field will display the end date of the activity. This is a text field.	No
County Completeness Determination	This section will display the determination question. Note: Description provided above.	Yes Validate when clicking on Save and Return button.
This Report-County Completeness Determination	This dropdown will display following values in this order: • Yes • No • N/A As a default, this field will display '-Select-'.	Yes Validate when clicking on Save and Return button.
This Report-Reimbursement Eligibility Determination	This dropdown will display following values in this order: • Yes • No As a default, this field will be '-Select-'.	Yes Validate when clicking on Save and Return button.
Reimbursement Eligibility Determination	This field will display the questions based upon the selection in County	Yes Validate when clicking on Save

	Completeness Determination question. Note: Description provided above.	and Return button.
Status	This field will display the updated status of the Report. Values for this field include: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error	No
Date	This field will display the date when the report is last updated formatted as mm/dd/yyyy. This is a text field.	No
Updated by	This field will display the staff id. Description provided above.	No

2.10.4 Page Location

- **Global:** Employment Services
- **Local:** Reporting
- **Task:** Customer Reporting

2.10.5 Security Updates

1. Security Rights

Security Rights	Right Description	Right to Group Mapping
EmploymentServicesReportingDetailView;	This right allows the user to access and view the Employment	Employment Services Reporting View

	Services Customer Reporting Detail Page.	
EmploymentServicesReportingDetailView; EmploymentServicesReportingDetailEdit;	This right allows the user to view and edit the Employment Services Customer Reporting Detail Page.	Employment Services Reporting Edit
EmploymentServicesReportingDetailView;	This right allows the user to view the Employment Services Customer Reporting Detail Page.	Employment Services Monthly Productivity View
EmploymentServicesReportingDetailView; EmploymentServicesReportingDetailEdit;	This right allows the user to view the Employment Services Customer Reporting Detail Page.	Employment Services Monthly Productivity Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Employment Services Reporting View	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document

Security Group	Group Description	Group to Role Mapping
Employment Services Reporting Edit	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document
Employment Services Monthly Productivity View	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document
Employment Services Monthly Productivity Edit	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document

2.10.6 Page Mapping

PMCR for the fields on the new page.

2.10.7 Page Usage/Data Volume Impacts

N/A

2.11 Employment Services Monthly Productivity List

2.11.1 Overview

Migrate the Employment Services Monthly Productivity List page from C-IV to LRS/CalSAWS. This page will be accessed from the Employment Services-Global Navigation, Workload Inventory-Local Navigation and Monthly Productivity-Task Navigation.

2.11.2 Monthly Productivity-Task Navigation Mockup

Figure 2.11.2-1 – Monthly Productivity-Task Navigation

2.11.3 Employment Services Monthly Productivity Mockup

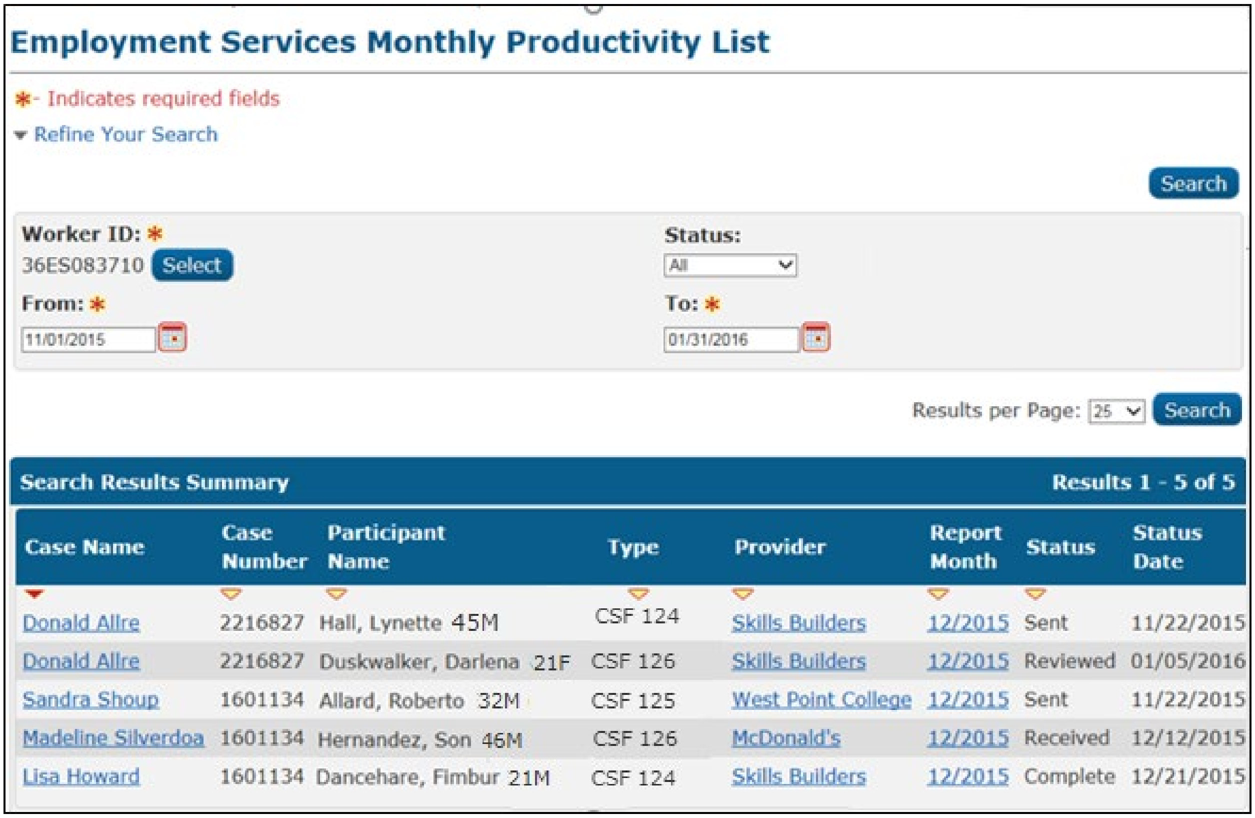

Figure 2.11.3-1 – Employment Services Monthly Productivity List page

2.11.4 Description of Change

1. Create/Migrate a new page 'Employment Services Monthly Productivity List' page in LRS/CalSAWS from C-IV.
2. The list of the Forms that can be displayed on the page are as follows:
   i. CSF 124
   ii. CSF 125
   iii. CSF 126
3. This new page will be accessed under Employment Services-Global Navigation, Workload Inventory-Local Navigation and Monthly Productivity-Task Navigation.
4. Add 'Monthly Productivity' option in the Workload Inventory-Task Navigation below Job Development Detail.
5. This page will display the records of cases assigned to the selected worker which have status dates falling within the specified date range and with the status matching the selection.

   See field level description of the Employment Services Monthly Productivity List page.

Field Name	Description	Required

Worker ID	This is a select field. This field navigates the user to the Select Worker page for selecting the worker.	Yes Validate when clicking on Search button.
Status	This field narrows down the search to the records with the matching statuses. This field will be defaulted to 'All'.	No
Date Range-From	When accessed from the Task Navigation bar, this field will be set to 2 months prior to the current month. When accessed from the Monthly Productivity List via a hyperlink, the field will be set to the selected month.	Yes Validate when clicking on Search button.
Date Range-To	This field will be defaulted to the current month.	Yes Validate when clicking on Search button.
Case Name	This column will display the name of the person in the case. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the Case Summary page.	
Case Number	This column will display the Person's case number. This is a text field.	
Participant Name	This column will display the name of the person participating in the activity formatted as <Last Name>, <First Name> <Age><Gender Initial>. This is a text field.	
Type	This column will display the title of the report. This is a text field.	
Provider	This column will display the name of the provider. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the existing Resource Detail page for the Provider.	
Report Month	This column will display the Reporting month. The value in this field will be hyperlinked. Upon	

	clicking on the link the user will be navigated to the Employment Services Customer Reporting List page.	
Status	This column will display the status of the report. This is a text field.	
Status Date	This column will display the date of the status last updated. This is a text field.	

2.11.5 Page Location

- **Global:** Employment Services
- **Local:** Workload Inventory
- **Task:** Monthly Productivity

2.11.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EmploymentServicesMonthlyProductivityListView	This right allows user to access Employment Services Monthly Productivity List Page.	Employment Services Monthly Productivity View
EmploymentServicesMonthlyProductivityListView	This right allows user to access Employment Services Monthly Productivity List Page.	Employment Services Monthly Productivity Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Employment Services Monthly Productivity View	This right allows user to access Employment Services Monthly Productivity List Page	See attached Security Matrix
Employment Services Monthly Productivity Edit	This right allows user to access Employment Services Monthly Productivity List Page	See attached Security Matrix

2.11.7 Page Mapping

PMCR for the fields on the new page.

2.11.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 124 Mockup	CSF124_EN.pdf CSF124_SP.pdf
2	Client Correspondence	CSF 125 Mockup	CSF125_EN.pdf CSF125_SP.pdf
3	Client Correspondence	CSF 126 Mockup	CSF126_EN.pdf CSF126_SP.pdf
4	Client Correspondence	CSF 127 Mockup	CSF127_EN.pdf CSF127_SP.pdf
5	Client Correspondence	CSF 128 Mockup	CSF128_EN.pdf
6	Client Correspondence	CSF126 Dynamic Section Example	CSF126 Dynamic Section Example.pdf
7	Security	Security Matrix	CA-201968 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The existing forms, pages, and batch processes used in tracking WTW activities were migrated from C-IV to LRS/CalSAWS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207133 | DDID 2213

Update Appointment functionality with Customer Appointment Search page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/1/2020	1.0	Initial Revision	Farhat Ulain

Table of Contents

1 OVERVIEW

This design outlines the changes to appointment functionality in LRS/CalSAWS to allow appointments to be searched for at a county and office level, without being in the context of a case.

1.1 Current Design

In LRS/CalSAWS, appointments are created for a specific case and customer, and the user is required to be in the context of a case to search for specific appointments from the Customer Schedule Search page.

1.2 Requests

Per Design Differences ID (DDID) 2213, create a new page to search for and view appointments at the office and county level, as well as by appointment status.

1.3 Overview of Recommendations

1. Create a new Customer Appointment Search page under Admin Tools-Global Navigation, Worker Schedule-Local Navigation and the Customer Appointment Search-Task Navigation.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

Update LRS/CalSAWS to allow appointments to be searched for at county and office level by creating a new Customer Appointment Search page.

2.1 Customer Appointment Search

2.1.1 Overview

Create a new 'Customer Appointment Search' page under Admin Tools-Global Navigation, Worker Schedule-Local Navigation and Customer Appointment Search-Task Navigation.

2.1.2 Customer Appointment Search Page Mockup

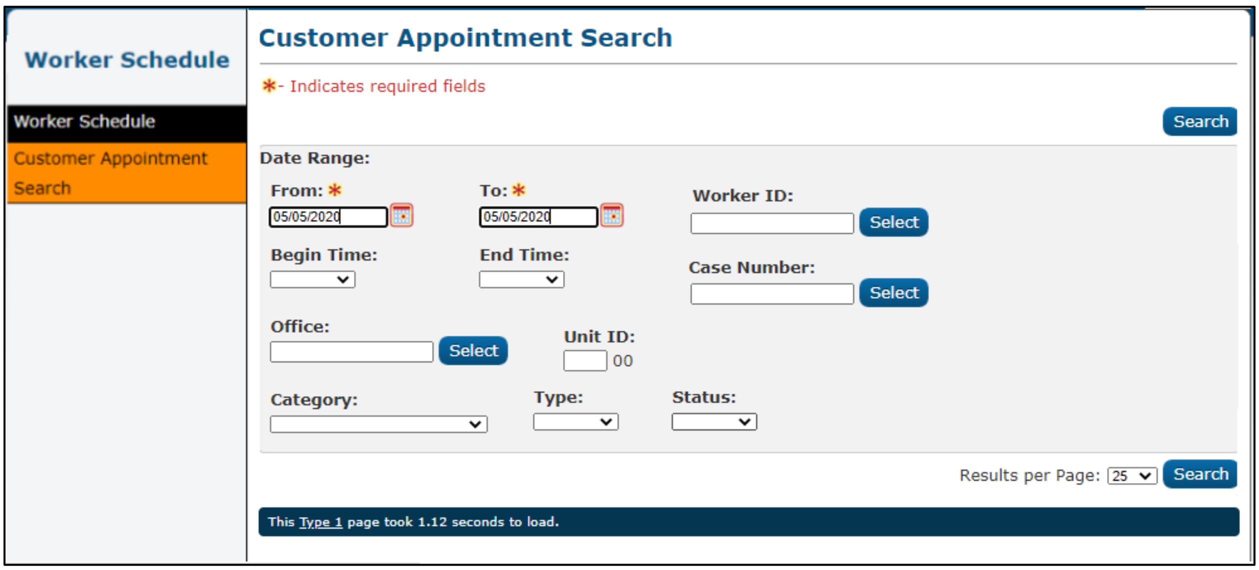

Figure 2.1.2.1– Customer Appointment Search

2.1.3 Search Results Summary Mockup

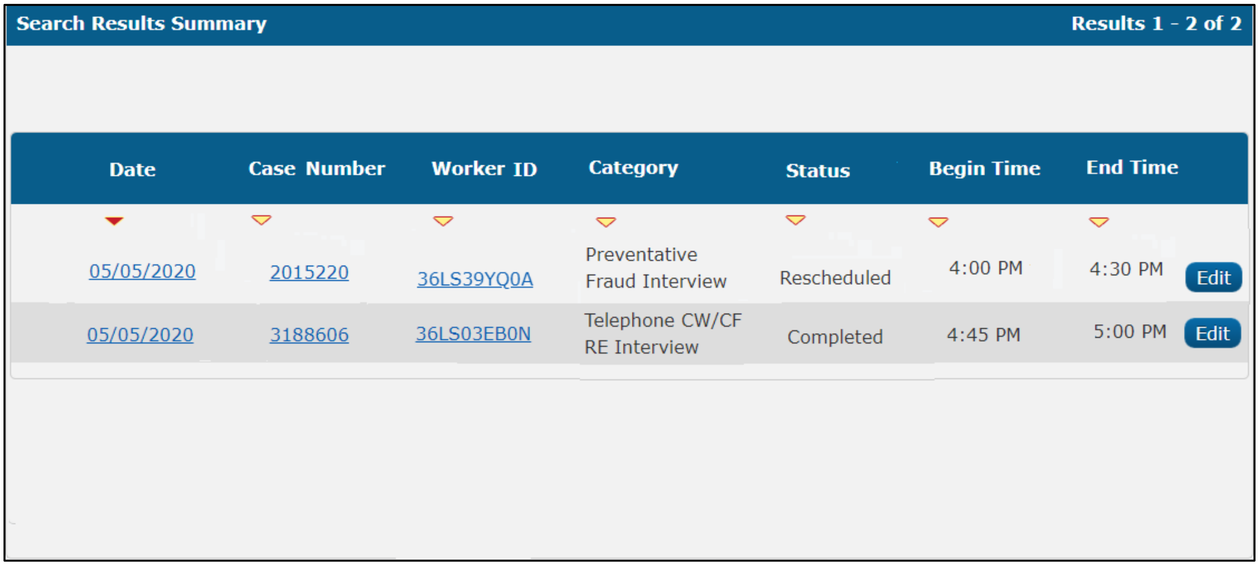

Figure 2.1.3.1– Search Results Summary

2.1.4 Description of Change

1. Create a new Customer Appointment Search page.
2. This page should be accessible under Admin Tools-Global Navigation, Worker Schedule-Local Navigation and Customer Appointment Search-Task navigation.
3. After entering required data and clicking the Search button, search results will display in the Search Results Summary section.
4. When an appointment is selected by clicking on the date hyperlink or the 'Edit' button from the Search Results Summary section, user will be navigated to the existing 'Customer Appointment Detail' page in View mode from the link or Edit mode from the Edit button.
5. When clicking on the Case Number hyperlink in the Search Results Summary section, user will be navigated to the Case Summary page.
6. Default sort for the Search Results Summary section will be in Descending order on the Date field.
7. There will be multiple records in the Search Results Summary section, if there are more than one appointment for the same date. No specific order is required for the records to be displayed.

See field level description for the Customer Appointment Search page.

Field Name	Description	Required
Date Range – From	Date range user selects formatted as mm/dd/yyyy.	Yes Validate when clicking on Search button for a maximum of 3 months.

Field Name	Description	Required
	Note: It only allows them to search within a 3 month time span.	"Date Range must be within three months."
Date Range – To	Date range user selects formatted as mm/dd/yyyy. Note: It only allows them to search within a 3 month time span.	Yes Validate when clicking on Search button for a maximum of 3 months. "Date Range must be within three months."
Begin Time	Begin time of the appointment user selects formatted as HH:MM AM/PM.	No
End Time	End time of the appointment user selects formatted as HH:MM AM/PM.	No
Case Number	Case Number field.	No
Office	Office name field. Note: When clicking on the 'Select' button for the 'Office' field, user will be navigated to the 'Select Office' page. This is existing functionality.	No
Unit	Unit number to be searched.	No
Worker ID	This field searches the Worker ID of the Worker assigned to the appointment. The hyperlink from the Search results will navigate the user to the Worker Detail page.	No
Category	This field searches the category of the	No

Field Name	Description	Required
	appointment the user selects. Note: The list of appointment categories displayed in the dropdown will remain the same as in the existing 'Customer Appointment Search' page.	
Type	This field searches the type of the appointment user selects. Note: The list of appointment types displayed in the dropdown will remain the same as in the existing 'Customer Appointment Search' page. This is a Category-dependent field, and will display the values based upon the selection in the 'Category' field.	No
Status	This field searches the status of the appointment user selects. The values display in the Status fields are: • Cancelled • Completed • No-Show • Rescheduled • Scheduled	No

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Worker Schedule
- **Task:** Customer Appointment Search

2.1.6 Security Updates

Security Right	Right Description	Right to Group Mapping
CustomerAppointmentSearchView		Customer Appointment View
CustomerAppointmentSearchEdit		Customer Appointment Edit

Note: Security Right will be tied up to the existing Security Groups.

2.1.7 Page Mapping

PMCR for the fields on the new page.

2.1.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Online	Appointment Management Solution	Security Matrix

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2213	**Original:** The CONTRACTOR shall update the Appointment Management Solution with the following updates: 1. Allow a global or office level view of appointments and availability of time slots. 2. Track the status of appointments as Unassigned, Assigned, Completed, or No-show. 3. Track the status of specific time slots in the calendar as Available, Unavailable, or Reserved. 4. Allow visual Color coding of all these types in the calendar interface. **Revised:** The CONTRACTOR shall create a new page to search for and view appointments at the office and county level, as well as by appointment status.	**Original:** Color coding changes will need to comply with Section 508 standards. **Revised:**	A new Customer Appointment Search page will allow a user to search for and view appointments for the county and office, as well as search for appointments by status. Existing Customer Appointment Detail functionality already displays available time slots through the Suggest Time(s) feature. Office Schedule functionality already allows visual color coding of appointments.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207198 | DDID 2079

Updates to Supportive Service Payments, Activities, and Progress Reports for WTW/REP Programs in Good Cause

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hayk Khachikyan
	Reviewed By	Duke Vang

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/30/2019	1.0	Initial Revision	Hayk Khachikyan
5/6/2019	1.1	Grammatical updates	Duke Vang
6/26/2020	1.2	Added an assumption for DDCR 4099	Duke Vang
7/8/2020	1.3	Added Good Cause WTW to Service Arrangement and Payment Request	Duke Vang
7/14/2020	1.4	Fixed minor typos from DEL Comments	Duke Vang
7/15/2020	1.5	Design clarifications to include more Progress Reports	Duke Vang
7/24/2020	1.6	Additional design clarifications from R6 comments	Duke Vang
8/3/2020	1.7	Added an assumption that WTW/REP program and program person status will always be in alignment. Also further clarified the criteria for batch triggers.	Duke Vang

Table of Contents

1 OVERVIEW

This document describes modification needed for the Supportive Services, Activities, and Progress Reports functionality when a Welfare-to-Work (WTW) or Refugee Employment Program (REP) Customer is in a status of Good Cause.

1.1 Current Design

Supportive Services and Payment Requests can be created for Active Welfare-to-Work (WTW), Refugee Employment Program (REP), CalFresh Employment & Training (CFET), and Cal-Learn (CL) programs. WTW and REP programs in a Good Cause status can also create Supportive Services and Payment Requests if the Customer Need Type is Diaper Allowance or Transportation.

Activities cannot be logged for WTW/REP Customers in a status of Good Cause.

The following Progress Reports are sent for WTW or REP Customers every month and/or 90 days when:

GN 6070:

- The Participant is Active in WTW or REP
- AND participating in one of the following Customer Activities:
    - Satisfactory School Attendance
    - Voc/Ed Training
    - Job Skills Training – Employed
    - WEX
    - Community Services
    - Education – Employed
    - Providing C/C Community Services
    - Work Study
    - Specialized Work Experience
    - On the Job Training
    - Paid Work Experience
    - CalWORKs 60-month Services
- OR employed in any of the following areas:
    - On the Job Training
    - Subsidized – Public
    - Subsidized – Private
    - Work Study
- OR participating in Other Welfare to Work Activities where the Service Activity was expunged.

GN 6365

- The Participant is not Sanctioned or Deregistered in WTW or REP
- AND participating in one of the following Customer Activities:
    - Community Services

    - Job Skills Training – Employed
    - Satisfactory School Attendance
    - Voc/Ed Training
    - WEX
    - Post CalWORKs 60-Month Services
    - Work Study
- OR employed in any of the following area:
    - On the Job Training
    - Subsidized – Public
    - Subsidized – Private
    - Work Study

GN 6008

- The Participant is Active in WTW, REP, or Cal-Learn
- AND participating in one of the following Customer Activities:
    - Domestic Violence
    - Drug/Alcohol
    - Mental Health

1.2 Requests

Per Design Differences ID (DDID) 2079, update the CalSAWS to allow Workers to create Service Arrangements and Payment Requests for Participants in a WTW or REP program with program status of Good Cause. WTW and REP Customers will still receive a Progress Report (GN 6070, GN 6365, and GN 6008) when the WTW and REP program status is Good Cause.

1.3 Overview of Recommendations

Add the ability to create a Supportive Service and Payment Request when a Participant is in a WTW or REP program with status of Good Cause regardless of the Need Type.

1.4 Assumptions

1. This update does not impact any reports.
2. There are no changes to Payment Request Claiming. If a Good Cause WTW or REP program is issued off a non-Active CW program, those issuances will error out (i.e. skip) in Claiming.
3. WTW and REP programs can be set to a Good Cause program status with an open Customer Activity.
4. The Nightly Issuance Batch already pulls in and issues WTW and REP Payment Request Authorization Records with a Good Cause program status.
5. The Progress Report Batch Sweeps (PB19R1918, PB19R1907, PB19R1919) are only executed for Los Angeles County. Los Angeles County will retain their own version of the Progress Reports (GN 6070, GN 6365, and GN 6008) and Progress Report Batch Sweeps.

6. DDCR 4099 (CA-201968) will be creating a new Progress Report Batch Sweep and generic Progress Report for the 57 Migration Counties.
7. WTW/REP Program Status will always align with the WTW/REP Program Person Status.

2 RECOMMENDATIONS

2.1 Customer Activity Detail

2.1.1 Overview

Validation on the Customer Activity Detail page will be updated to allow Activities to be added for Good Cause WTW and REP programs.

2.1.2 Customer Activity Detail Mockup

N/A

2.1.3 Description of changes

1. Update the "Program Type" dropdown field to display "Welfare to Work" as an option when the WTW program is in a status of Good Cause.
2. Update the "Program Type" dropdown field to display "REP" as an option when the REP program is in a status of Good Cause.

2.1.4 Page Location

- **Global: Empl. Services**
- **Local: Activities**
- **Task: Customer Activities**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Service Arrangement Detail

2.2.1 Overview

Validations on the Service Arrangement Detail page will be updated to allow Good Cause WTW and REP programs to be selectable and Saved for all Customer Need Types.

2.2.2 Service Arrangement Detail Mockup

N/A

2.2.3 Description of changes

Update the page validation on the Service Arrangement Detail page to allow WTW and REP programs in a status of Good Cause to be selectable, Saved, and Approved for all Customer Need Types.

2.2.4 Page Location

- **Global: Empl. Services**
- **Local: Supportive Services**
- **Task: Service Arrangements**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Payment Request Detail

2.3.1 Overview

Validations on the Payment Request Detail page will be updated to allow Good Cause REP programs to be Approved.

2.3.2 Payment Request Detail Mockup

N/A

2.3.3 Description of changes

Update the page validation on the Payment Request Detail page to allow WTW and REP programs in a status of Good Cause to be Approved for all Customer Need Types.

2.3.4 Page Location

- **Global: Fiscal**
- **Local: Payment Request**
- **Task: Payment Request Search**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Progress Report Batch

2.4.1 Overview

The Progress Report Batch Sweeps for Los Angeles County will be updated to also trigger the generation of the Progress Report when a WTW or REP program status is Good Cause.

2.4.2 Description of Change

1. Update the following Progress Report Batch Sweeps to also trigger the generation of a Progress Report when the Customer Program Status on a WTW or REP program is Good Cause and the WTW or REP Program Status is also Good Cause.
   a. PB19R1918 – Progress Report – Education/Post-EMPL/WEX and Community Services (GN 6070)

      Note: The Progress Report will NOT generate for a Customer on a WTW or REP program in Good Cause if the Customer does not have a Customer Activity logged.

   b. PB19R1907 – Monthly Attendance Report Form (GN 6365)

c. PB19R1919 – Progress Report Mental Health/Substance Abuse/DV/Family Reunification (GN 6008)

2.4.3 Execution Frequency

Daily

2.4.4 Key Scheduling Dependencies

N/A

2.4.5 Counties Impacted

Los Angeles County only

2.4.6 Data Volume/Performance

GN 6070

Los Angeles County: 58 records a day

C-IV Counties: N/A

CalWIN Counties: N/A

GN 6365

Los Angeles County: 12 records a day

C-IV Counties: N/A

CalWIN Counties: N/A

GN 6008

Los Angeles County: 2 records a day

C-IV Counties: N/A

CalWIN Counties: N/A

2.4.7 Failure Procedure/Operational Instructions

Batch restart data must be purged and the batch job must be resubmitted.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2079	The CONTRACTOR shall add the ability to issue a supportive service payment when a customer is in a WTW/REP program status of good cause. The CONTRACTOR shall add the ability to add an activity when a customer is in a WTW/REP program status of good cause. The CONTRACTOR shall send the Progress Report when a customer is in a WTW/REP program status of good cause.	N/A	1. Service Arrangement Detail page is updated to allow for Good Cause WTW and REP programs to be selectable. 2. Payment Request Detail page is updated to allow for Good Cause WTW and REP programs to be selectable. 3. Updated the "Program Type" field on Customer Activity Detail to display Welfare to Work and REP when WTW and REP programs are in a Good Cause status. 4. Updated the Progress Report batch triggers to include Good Cause WTW and REP Customers.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207207 | DDID 2067

Add Functionality to Grant Conditionally Eligible to Medicare Savings Programs (MSP)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rajan Vadapalli
	Reviewed By	Derek Goering, Chad Quan, Raju Indala, Prashant Goel, Geetha Ramalingam, Priya Sridharan, Raj Devidi, William Baretsky, Chris Larson, Bala Kumar Murthy, Michael Wu

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/28/2019	0.1	Added Overview, Request, Recommendations	Rajan Vadapalli
11/20/2019	0.2	Added Medicare Detail page, Budget section updates	Rajan Vadapalli
1/15/2020	0.3	Added Batch changes	Avi Bandaranayake
05/07/2020	0.4	Updated Page Mockups	Rajan Vadapalli
05/12/2020	0.5	Added Client Correspondence updates	Nithya Chereddy
5/20/2020	0.6	Updated Medi-Cal EDBC Rules and Batch EDBC sections	Amy Gill
7/8/2020	0.7	Update per QA comments: Added Reviewers, updated 2.2.6 Page mapping to “N/A”, Added 2.6.7 Failure Procedure/Op instructions	Renee Gustafson

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1 OVERVIEW

This is a migration requirement to update CalSAWS with functionality to grant Conditional Eligibility for Qualified Medicare Beneficiary (QMB), a Medicare Savings Program (MSP), when an applicant has only Conditional Eligibility of Medicare Part A. MSP is also referred to as the Medicare Premium Payment Program (MPPP) in CalSAWS.

1.1 Current Design

During the annual Medicare open enrollment period (January-March), Medicare may determine a person Conditional Eligibility to Medicare Part A effective July 1. The person can apply for QMB effective July 1 as soon as they receive the Conditionally Eligibility for Medicare Part A, but there is no automated process to grant conditional eligibility to QMB effective July 1 prior to when the July benefit month opens in CalSAWS. The current process is a manual process within each county and the County Eligibility Worker (CEW) must wait to process the applications in the system until the July benefit month opens in CalSAWS to run EDBC. Once the July benefit month opens in CalSAWS to run EDBC, the CEW processes the application and Medi-Cal EDBC rules determine if the applicant is eligible for QMB.

1.2 Requests

1. Update CalSAWS to grant QMB to individuals who are otherwise QMB eligible and have conditional eligibility to Medicare Part A.
2. Create a batch process that will re-evaluate the Conditionally Eligible QMB individual when the July Benefit month opens up to remove the Conditionally Eligible indicator in Medi-Cal EDBC.

1.3 Overview of Recommendations

1. Update the Medicare Detail page to collect ‘Part A Effective Date’ and ‘Part A Conditional Eligible’ fields.
2. Update the Medicare Transaction History Detail page to display ‘Part A Conditional Eligible’ and ‘Part A Effective Date’.
3. Update Medi-Cal EDBC rules to grant Conditional Eligibility to QMB to individuals who are otherwise eligible to QMB and are conditionally eligible for Medicare Part A.
4. Update the Medi-Cal EDBC Summary page to display ‘QMB Conditionally Eligible’ column in ‘Eligible Budgets for MEDS’ section.
5. Update the Medi-Cal EDBC – MPPP - MC page to display ‘Conditionally Eligible’ column when an individual is granted QMB based on conditionally eligible Medicare Part A.
6. Create an EDBC sweep job to identify individuals who are Conditionally Eligible for QMB because of conditional eligibility to Medicare Part A. Individuals who are no longer eligible to Conditional QMB will be evaluated for other Medi-Cal eligibility (e.g., regular QMB).

7. Update CalSAWS to generate a QMB Conditional Eligibility Approval NOA when MC EDBC grants Conditional Eligibility for QMB for an individual.
8. Suppress the generation of the regular MSP Approval NOA when the newly added QMB Conditional Eligibility Approval NOA generates.

1.4 Assumptions

1. Existing QMB eligibility rules remain and the only addition is the check for conditional eligibility to Medicare Part A.
2. Existing EW20 batch sweep and transaction to MEDS is sufficient for MEDS to trigger the required ELIG STAT in MEDS.
3. The CEW will enter 'Part A Effective Date' as July 1st of the current year.
4. eHIT updates for Conditional Eligibility for Medicare Part A are addressed with CA-213164 SCR.
5. Regular MSP Approval NOA will not be generated if the newly added QMB NOA is generated previously.
6. Existing 'Discontinuance NOA' will generate if the recipient is no longer eligible for QMB Part A Medicare Savings Program, including when the discontinuance is prior to the end of the 'Part A Effective Date'.

2 RECOMMENDATIONS

Update CalSAWS to pre-approve QMB due to conditionally eligible Medicare Part A for individuals who are otherwise eligible to QMB.

2.1 Medicare Detail

2.1.1 Overview

Update the Medicare Detail page to collect 'Part A Effective Date' and 'Part A Conditional Eligible' fields.

2.1.2 Medicare Detail Mockup

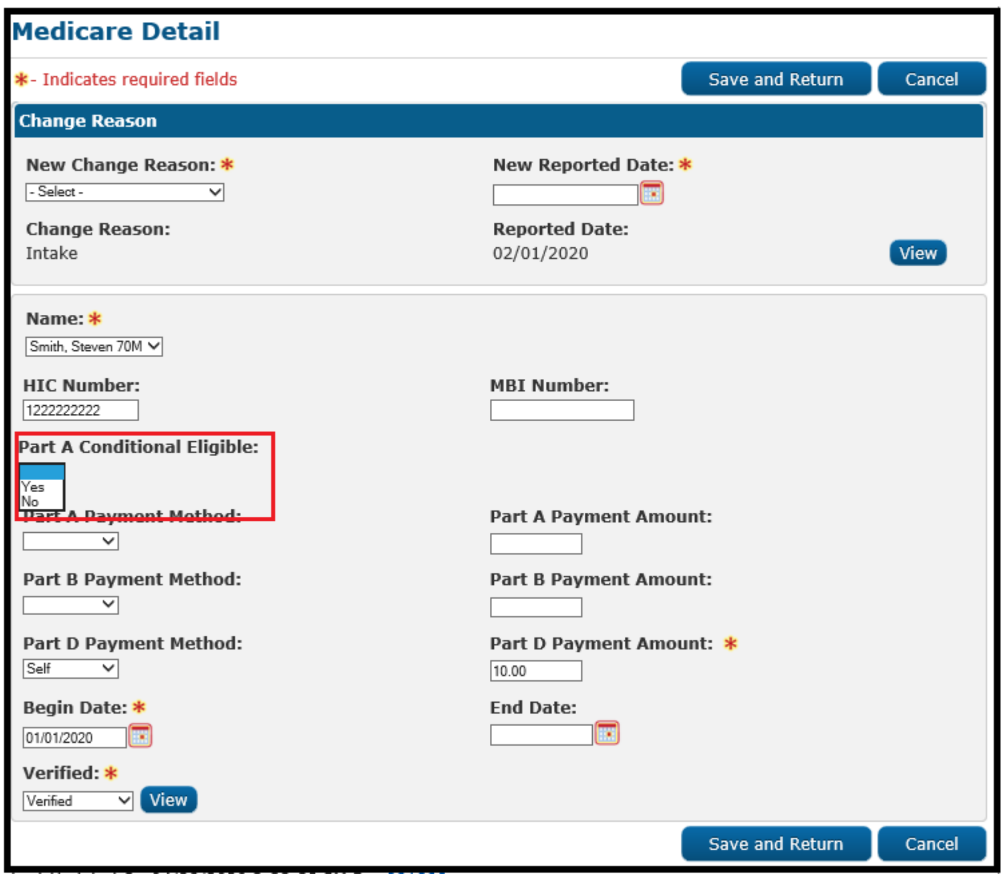


Figure 2.1.2.1 – Medicare Detail Page

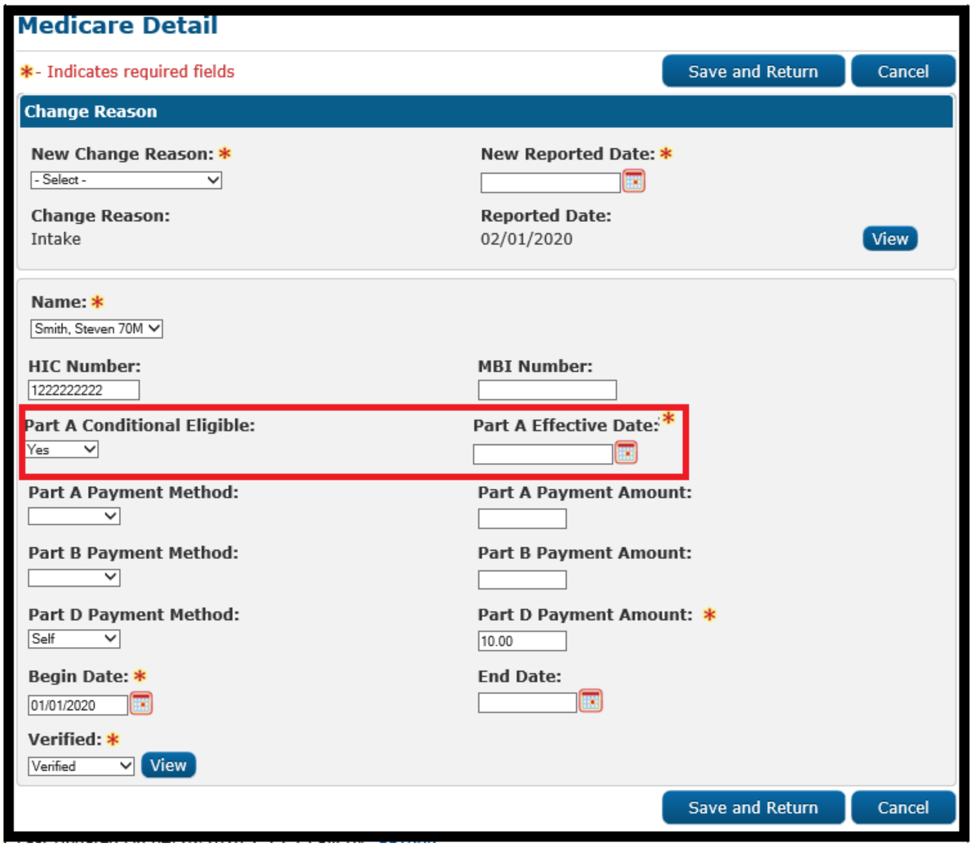


Figure 2.1.2.2 – Medicare Detail Page

2.1.3 Description of Change

1. Add a non-mandatory dropdown field 'Part A Conditional Eligible' to the Medicare Detail page. Options include:
   a. Blank (Default)
   b. Yes
   c. No
2. Add a date field 'Part A Effective Date' that will display only when the user has selected 'Yes' in 'Part A Conditional Eligible' field.
   a. Indicate 'Part A Effective Date' field as required field when 'Yes' is selected in 'Part A Conditional Eligible' field.

2.1.4 Page Location

Global: Eligibility
Local: Customer Information
Task: Medicare

2.1.5 Security Updates

None

2.1.6 Page Mapping

Add page mapping for the added fields.

2.1.7 Page Usage/Data Volume Impacts

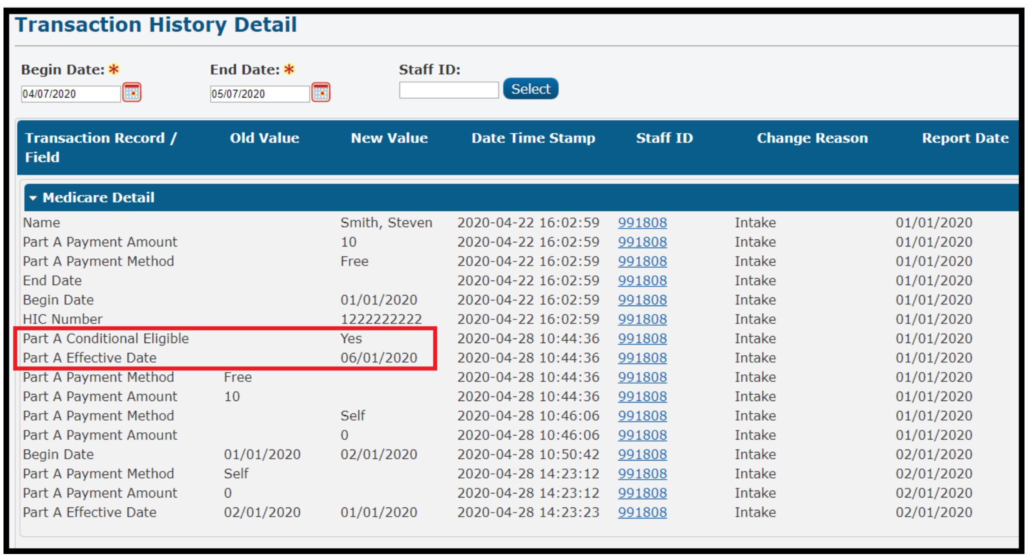
No change

2.2 Transaction History Detail

2.2.1 Overview

Update the Medicare Transaction History Detail page to display ‘Part A Conditional Eligible’ and ‘Part A Effective Date’.

2.2.2 Transaction History Detail Mockup



Transaction History Detail

Begin Date: * 04/07/2020 End Date: * 05/07/2020 Staff ID: Select

Transaction Record / Field	Old Value	New Value	Date Time Stamp	Staff ID	Change Reason	Report Date
▾ Medicare Detail						
Name		Smith, Steven	2020-04-22 16:02:59	991808	Intake	01/01/2020
Part A Payment Amount		10	2020-04-22 16:02:59	991808	Intake	01/01/2020
Part A Payment Method		Free	2020-04-22 16:02:59	991808	Intake	01/01/2020
End Date			2020-04-22 16:02:59	991808	Intake	01/01/2020
Begin Date		01/01/2020	2020-04-22 16:02:59	991808	Intake	01/01/2020
HIC Number		1222222222	2020-04-22 16:02:59	991808	Intake	01/01/2020
Part A Conditional Eligible		Yes	2020-04-28 10:44:36	991808	Intake	01/01/2020
Part A Effective Date		06/01/2020	2020-04-28 10:44:36	991808	Intake	01/01/2020
Part A Payment Method	Free		2020-04-28 10:44:36	991808	Intake	01/01/2020
Part A Payment Amount	10		2020-04-28 10:44:36	991808	Intake	01/01/2020
Part A Payment Method		Self	2020-04-28 10:46:06	991808	Intake	01/01/2020
Part A Payment Amount		0	2020-04-28 10:46:06	991808	Intake	01/01/2020
Begin Date	01/01/2020	02/01/2020	2020-04-28 10:50:42	991808	Intake	02/01/2020
Part A Payment Method	Self		2020-04-28 14:23:12	991808	Intake	02/01/2020
Part A Payment Amount	0		2020-04-28 14:23:12	991808	Intake	02/01/2020
Part A Effective Date	02/01/2020	01/01/2020	2020-04-28 14:23:23	991808	Intake	02/01/2020

Figure 2.2.2.1 – Transaction History Detail Page

2.2.3 Description of Change

1. Add ‘Part A Conditional Eligible’ and ‘Part A Effective Date’ to the Transaction History Detail page.

2.2.4 Page Location

Global: Eligibility

Local: Customer Information
Task: Medicare

2.2.5 Security Updates

None

2.2.6 Page Mapping

N/A - No page mapping exists

2.2.7 Page Usage/Data Volume Impacts

No change

2.3 Medi-Cal EDBC Rules

2.3.1 Overview

Update Medi-Cal EDBC rules to grant Conditional Eligibility to QMB to individuals who are conditionally eligible for Medicare Part A.

2.3.2 Description of Change

1. Add a new 'QMB Conditionally Eligible' indicator which will be used for tracking Conditional Eligibility to QMB. The 'QMB Conditionally Eligible' indicator will be either "Yes" or empty. The indicator will never be set to "No".
2. Update MC EDBC to set the 'QMB Conditionally Eligible' indicator to "Yes" for individuals with Conditional Eligibility for Medicare Part A when the following conditions are met:
    a. The individual is otherwise eligible to QMB.
    b. The Medicare Detail record effective for the EDBC benefit month for the individual has the following values:
        i. The 'Part A Conditional Eligible' field is "Yes" and the 'Part A Effective Date' is on or after July 1st of the EDBC benefit year.
    c. The EDBC benefit month is on or after January and on or before June of the 'Part A Effective Date' year.
    d. If the EDBC benefit month is on or after the 'Part A Effective Date', EDBC will no longer set the 'QMB Conditionally Eligible' indicator to "Yes".

3. For a QMB-only program, if all QMB individuals are QMB Conditionally Eligible, set the Redetermination period with Begin Date to the first of the month of the 'Part A Effective Date' and the Due Date to the last of the month of 'Begin Date + 11 months' upon first approval of the application.
   Example: A Worker runs MC EDBC for March 2021 Benefit Month to evaluate for Conditional QMB. If the 'Part A Effective Date' is 07/01/2021, and the Medi-Cal rules grant Conditional Eligibility to QMB, the RE Due Date will be 06/30/2022, on the QMB-only program.

2.3.3 Programs Impacted

Medi-Cal

2.3.4 Performance Impacts

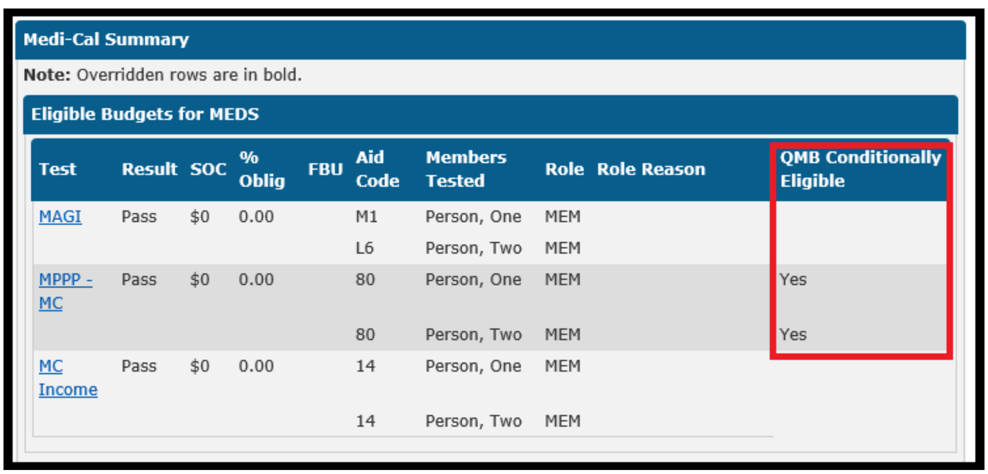
N/A

2.4 Medi-Cal EDBC Summary

2.4.1 Overview

Update the Medi-Cal EDBC Summary page to display 'QMB Conditionally Eligible' column in 'Eligible Budgets for MEDS' section.

2.4.2 Medi-Cal EDBC Summary Mockup



Medi-Cal Summary

Note: Overridden rows are in bold.

Eligible Budgets for MEDS

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason	QMB Conditionally Eligible
MAGI	Pass	$0	0.00		M1	Person, One	MEM		
					L6	Person, Two	MEM		
MPPP - MC	Pass	$0	0.00		80	Person, One	MEM		Yes
					80	Person, Two	MEM		Yes
MC Income	Pass	$0	0.00		14	Person, One	MEM		
					14	Person, Two	MEM		

Figure 2.4.2.1 – Medi-Cal EDBC Summary Page

2.4.3 Description of Change

1. Add a column named, 'QMB Conditionally Eligible' to the 'Eligible Budgets for MEDS' sub-section in the Medi-Cal Summary section on the Medi-Cal EDBC Summary page.
2. Display the 'QMB Conditionally Eligible' column and "Yes" only when MC EDBC granted Conditional Eligibility for QMB due to the conditional eligible Medicare Part A.

2.4.4 Page Location

Global: Eligibility
Local: Customer Information
Task: Run EDBC

2.4.5 Security Updates

None

2.4.6 Page Mapping

Add page mapping for the added field.

2.4.7 Page Usage/Data Volume Impacts

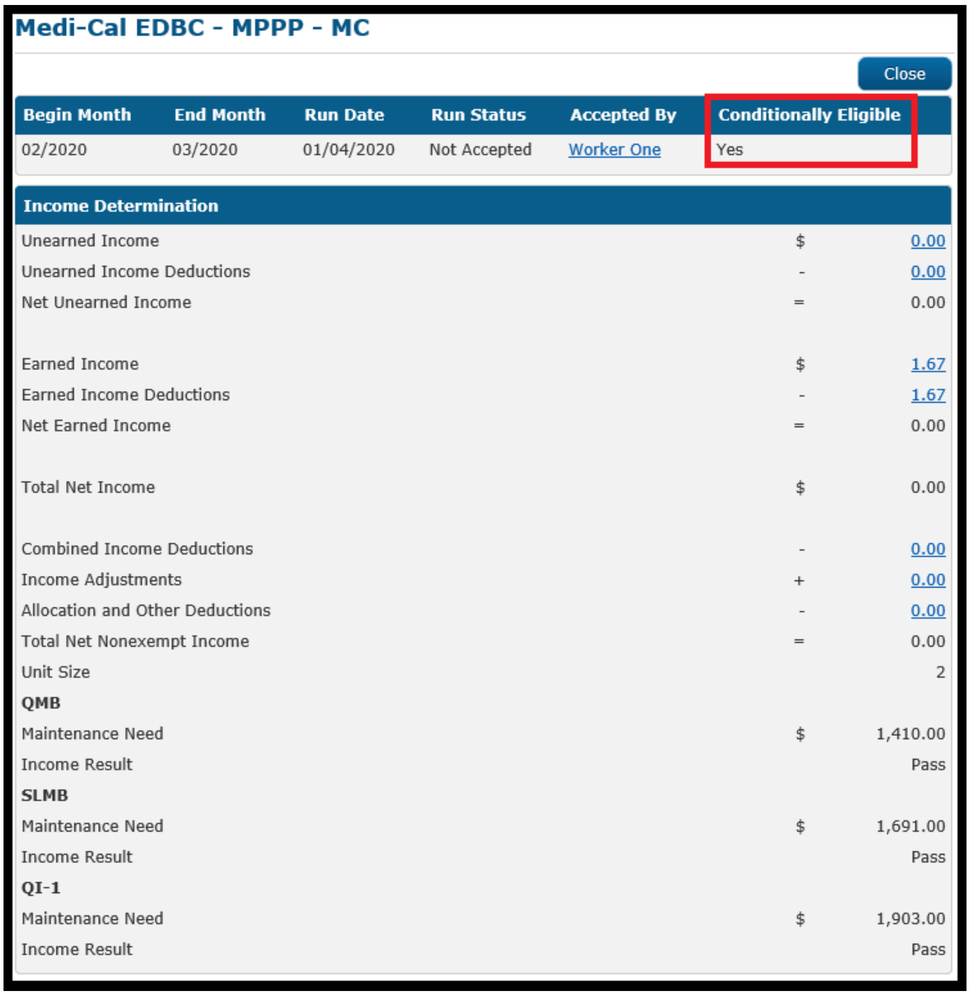
No change

2.5 Medi-Cal EDBC – MPPP – MC

2.5.1 Overview

Update the Medi-Cal EDBC – MPPP - MC page to display 'Conditionally Eligible' column when an individual is granted QMB based on conditionally eligible Medicare Part A.

2.5.2 Medi-Cal EDBC – MPPP – MC Mockup


Medi-Cal EDBC - MPPP - MC

Close

Begin Month	End Month	Run Date	Run Status	Accepted By	Conditionally Eligible
02/2020	03/2020	01/04/2020	Not Accepted	Worker One	Yes

Income Determination		
Unearned Income	$	0.00
Unearned Income Deductions	-	0.00
Net Unearned Income	=	0.00
Earned Income	$	1.67
Earned Income Deductions	-	1.67
Net Earned Income	=	0.00
Total Net Income	$	0.00
Combined Income Deductions	-	0.00
Income Adjustments	+	0.00
Allocation and Other Deductions	-	0.00
Total Net Nonexempt Income	=	0.00
Unit Size		2
QMB		
Maintenance Need	$	1,410.00
Income Result		Pass
SLMB		
Maintenance Need	$	1,691.00
Income Result		Pass
QI-1		
Maintenance Need	$	1,903.00
Income Result		Pass

Figure 2.5.2.1 – Medi-Cal EDBC – MPPP - MC Page

2.5.3 Description of Change

1. Add a column named, 'Conditionally Eligible' to the right of 'Accepted By' on the Medi-Cal EDBC – MPPP – MC page.
2. Display the 'Conditionally Eligible' column and "Yes" value only when an individual is found Conditionally Eligible for QMB due to conditional eligibility for Medicare Part A.

2.5.4 Page Location

Global: Eligibility
Local: Customer Information
Task: Run EDBC

2.5.5 Security Updates

None

2.5.6 Page Mapping

Add page mapping for the added field.

2.5.7 Page Usage/Data Volume Impacts

No change

2.6 EDBC Re-evaluation Batch Sweep

2.6.1 Overview

Create an EDBC sweep job to identify individuals who are Conditionally Eligible for QMB because of conditional eligibility to Medicare Part A. Individuals who are no longer eligible to Conditional QMB will be evaluated for other Medi-Cal eligibility (e.g., regular QMB).

2.6.2 Description of Change

1. Create a new MC EDBC sweep to identify MC programs with a high dated accepted/saved EDBC (i.e. most recent) that have the 'QMB Conditionally Eligible' indicator as Yes to be processed by Batch EDBC. Run in Targeted Programs mode for the MC program only and use the new Journal ID from Recommendation 2.

2. Add a new Batch EDBC Sub-Type Code (CT 942) for 'End of Conditional Medicare Part A.' The below journal will generate when EDBC is successfully processed through Batch.

   Journal Type: Batch EDBC
   Short Description: Batch EDBC ran for [MONTH/YEAR].
   Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons:
   End of Conditional Medicare Part A

2.6.3 Execution Frequency

Yearly Batch job in June, prior to 10-day.

Note: The EDBC sweep job is for the July Benefit Month.

2.6.4 Key Scheduling Dependencies

None

2.6.5 Counties Impacted

All counties

2.6.6 Data Volume/Performance

N/A

2.6.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.7 Correspondence: Add new QMB Approval Reason Fragment

2.7.1 Overview

This effort is to add the new QMB approval reason to the NOA.

- Program: MPPP
- Action type: Approval
- Fragment level: Program
- Repeatable: No
- Regulations: California Code of Regulations, Title 22, Section(s): 50258
- Include NA Back 9: Yes
- Languages: English, Spanish

Note: Threshold will be added with the SCR CA-216377.

2.7.2 Create QMB Approval Reason Fragment

Create a new QMB approval reason Fragment

NOA Mockup: Refer to Supporting Document #1

Spanish Translations: Refer to Supporting Document #3

Description	Text
Static	We determined that: Benefits have been approved for: <List_of_Persons> Since you have applied for conditional Medicare Part A benefits at the Social Security Administration (SSA) office, you will be eligible for QMB Program benefits beginning, July 1, <YYYY>, once SSA verifies your Part A eligibility. No further action is required on your part. The QMB Program pays Medicare expenses including premiums, co-insurance fees and deductibles. IF YOU ALSO APPLIED FOR REGULAR MEDI-CAL BENEFITS, YOU WILL RECEIVE A SEPARATE NOTICE REGARDING YOUR ELIGIBILITY. IF YOU ARE ALREADY RECEIVING MEDI-CAL, THIS NOTICE DOES NOT AFFECT THOSE BENEFITS.

2.7.3 Add Fragment Generation

Add the following new reason fragment to the NOA when QMB benefits are approved with Conditional Eligibility i.e. when the 'QMB Conditionally Eligible' field is set to 'Yes' in Medi-Cal EDBC Summary Page.

- Program: MPPP
- Action Type: Approval
- Fragment Level: Program
- NOA Reference on Document List Page: QMB Conditional Eligibility
- NOA Template: MSP NOA Template (Q_NOA_TEMPLATE)
- NOA Title: Medicare Savings Program Approval (MC_AP_NOA_TYPE_MSP)

Ordering on NOA: This fragment will generate immediately following the Action fragment.

Action Fragment: The following action fragment will be populated on the QMB Conditional Eligible Approval NOA.

Fragment Name, ID	Text
Q_AP_ACTION1, 4086	We reviewed your application to see if you are eligible for the Medicare Savings Programs (Qualified Medicare Beneficiary [QMB], Specified Low-Income Medicare Beneficiary [SLMB] or Qualifying Individual –1 [QI-1]).

Message Fragment: This fragment will not have an associated Message Fragment.

Note: Spanish translation for Action fragment and NOA Title and are in supporting documents #2 and #4 respectively.

2.7.4 Variable Population:

The new QMB reason fragment has a variable list.

Variable Name	Population	Formatting
<List_of_Persons>	Populates with the list of person names (First and Last) who are approved for QMB conditional eligibility. For example: "John Doe Jane Doe"	Arial Font Size 10
<YYYY>	Populate the year of the EDBC benefit month. Example: '2020' if the EDBC is run in May 2020	Arial Font Size 10

2.8 Correspondence: Suppression of the regular MSP Approval NOA

2.8.1 Overview

This effort is to suppress the generation of the regular MSP Approval NOA when the newly added QMB Conditional Eligibility Approval NOA generates.

2.8.2 Suppress the MSP Approval NOA

Suppress the regular MSP NOA when the QMB Conditional Eligibility Approval NOA generates. Details of the NOA (reason) to suppress are listed below.

Reason ID: 6301

Reason Name: Q_AP_MSP_APPLIED_Q001

Verbiage:

We determined that:

Beginning <Begin_Date>, you meet the basic eligibility requirements for the Qualified Medicare Beneficiary [QMB] program.

Benefits are approved for:

{Person}

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Client Correspondence	QMB Conditional Eligibility approval NOA English	QMB Conditional Eligibility approval NOA.pdf
2.	Client Correspondence	QMB Conditional Eligibility action fragment – Spanish	QMB CE Spanish Action.pdf
3.	Client Correspondence	QMB Conditional Eligibility reason fragment – Spanish	QMB CE Spanish Reason.pdf
4.	Client Correspondence	Spanish NOA Title	Spanish NOA Title.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2067	The CONTRACTOR shall add functionality to grant conditional eligibility for Medicare Savings Program (MSP).	Level of effort for estimates includes updates to eligibility rules, 2 new notices in English/Spanish, a new Batch EDBC program to determine eligibility at the end of the conditional eligibility period, an online page update and MEDS update.	Update CalSAWS to pre-approve QMB Part A Medicare Savings Program (MSP) for individuals who are eligible so that the state will have enough time to initiate the buy-in and start paying the Part A premium effective July 1st.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207216 | DDID 2058

Update display of CalHEERS Verifications on Data Collection List pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/01/2020	1.0	Initial Document	Jasmine Chen
07/15/2020	1.1	Updated per CA-207216 QA Comments Log	Jasmine Chen

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1 OVERVIEW

1.1 Current Design

Within each Determination of Eligibility Response (DER) received from the California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS), the corresponding MAGI Person Detail page displays the admin verifications and e-verifications received for each case person.

SCR CA-213468 will update the MAGI Person Detail page to display additional verification information such as the attested value, status, source, cache begin date and cache expiration date. Statuses that can be displayed are: E-Verified, Pending, Not Verified, Pass or Fail.

Currently, LRS/CalSAWS users can only view CalHEERS verification information on the MAGI Person Detail page.

1.2 Requests

Update LRS/CalSAWS to display CalHEERS verifications on applicable data collection pages in the CalSAWS Software.

1.3 Overview of Recommendations

1. Update applicable data collection List pages to display an expandable section titled 'CalHEERS Verifications', mapped with corresponding verification types and statuses received for the linked case person.

1.4 Assumptions

1. Verifications are communicated to LRS/CalSAWS via the eHIT interface from CalHEERS. They are received within a DER, used by CalHEERS for eligibility determinations, and will not be used by CalSAWS for any EDBC program.
2. No changes are made to the LRS/CalSAWS eHIT interface for sending 'Yes' or 'No' admin verifications in an Eligibility Determination Request (EDR).
3. The 'CalHEERS Verifications' statuses will display the same statuses from CA-213468's updates to the MAGI Person Detail page. CalSAWS will display this information as it is received from CalHEERS and will not interpret it.
4. The latest DER received as of system date can be unsolicited or solicited.
5. There will be no conversion activities; DERs received before CA-213468 implementation will not display verification information under this section.
6. The 'CalHEERS Verifications' section will show 'No Data Found', if the case persons of the latest DER are linked in CalSAWS yet the DER is not providing enough information (e.g. DERs converted from another system).
7. MEC – MEDS Verification is not included in this DDID as it has no direct association to a data collection page.
8. The display of the 'CalHEERS Verifications' section does not depend on any Eligibility Determination and Benefit Calculation (EDBC) run.

2 RECOMMENDATIONS

2.1 'CalHEERS Verifications' section

2.1.1 Overview

An expandable section titled 'CalHEERS Verifications' on applicable data collection List pages will display corresponding verification types and statuses from the latest DER received as of system date.

2.1.2 'CalHEERS Verifications' section on List page Mockups

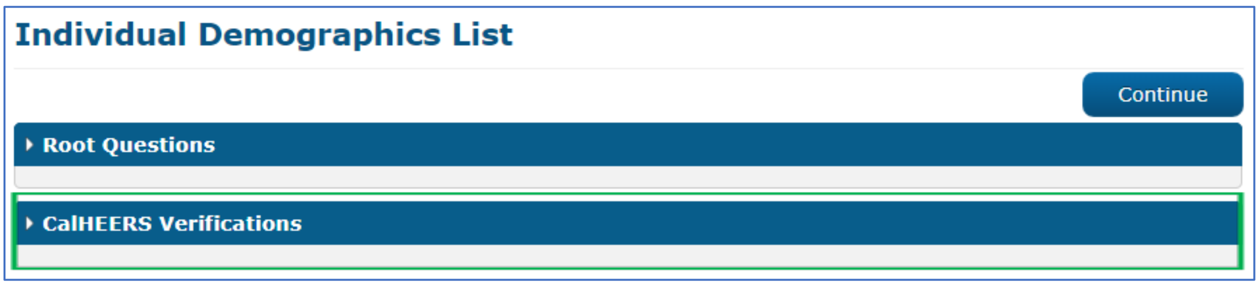


Figure 2.1.1 – 'CalHEERS Verifications' section collapsed

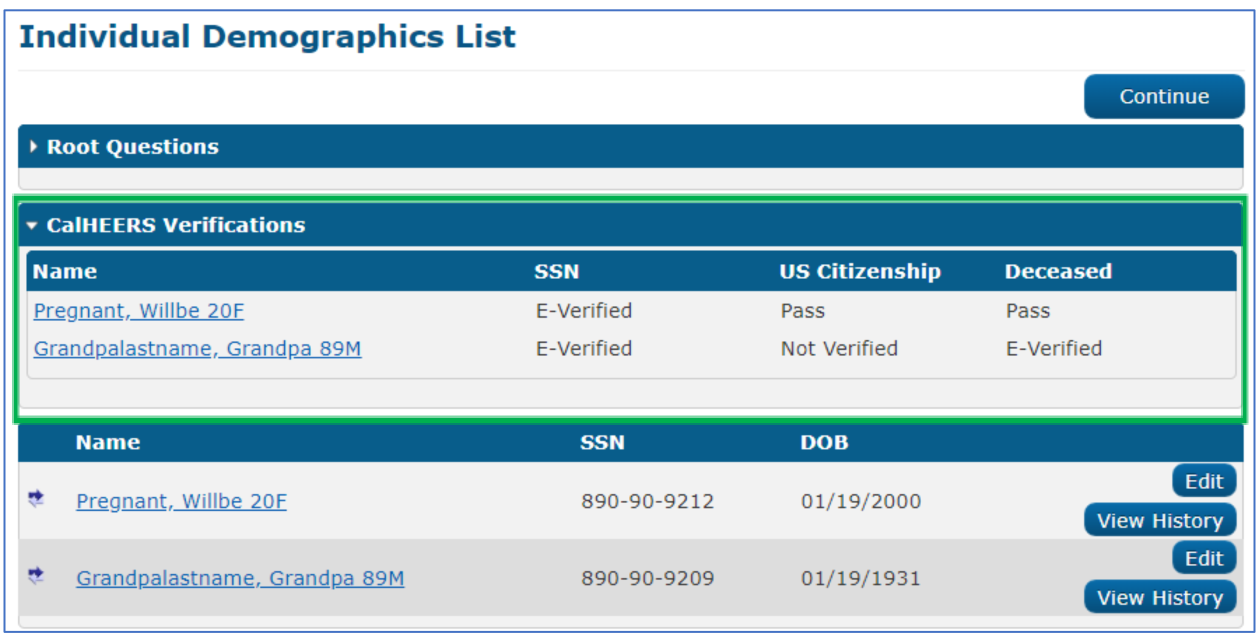


Figure 2.1.2 – 'CalHEERS Verifications' section expanded, on Individual Demographics List

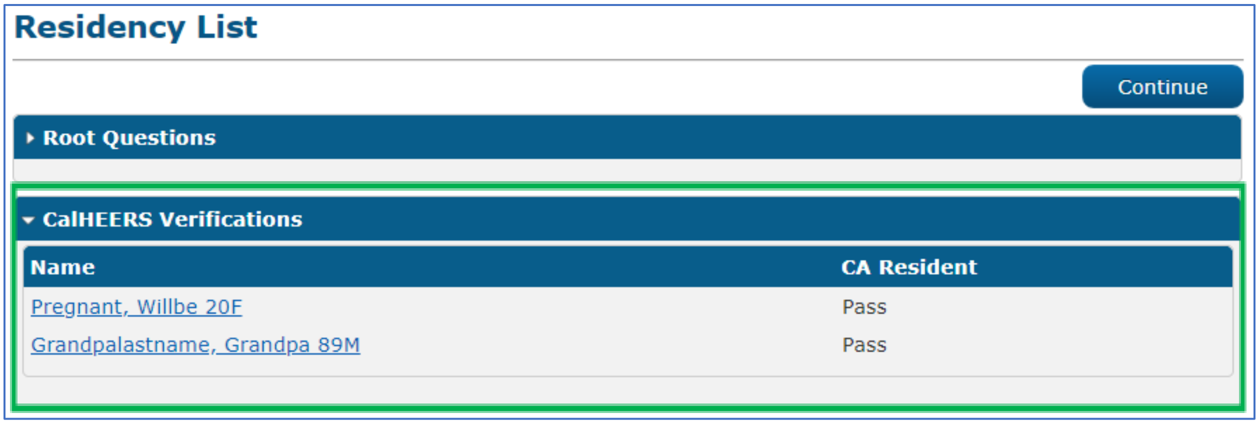


Figure 2.1.3 – 'CalHEERS Verifications' section on Residency List

Z

Figure 2.1.4 – 'CalHEERS Verifications' section on Citizenship Status List

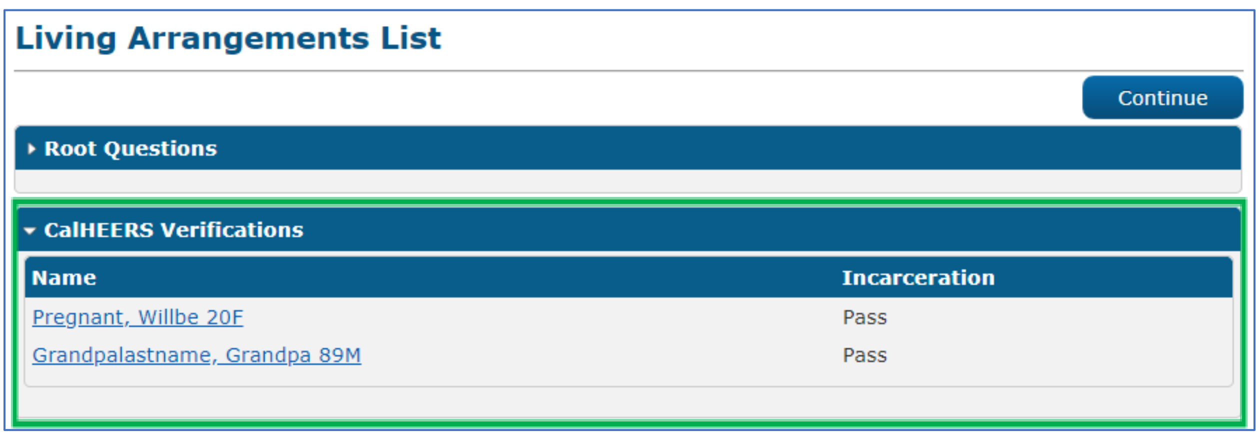


Figure 2.1.5 – 'CalHEERS Verifications' section on Living Arrangements List

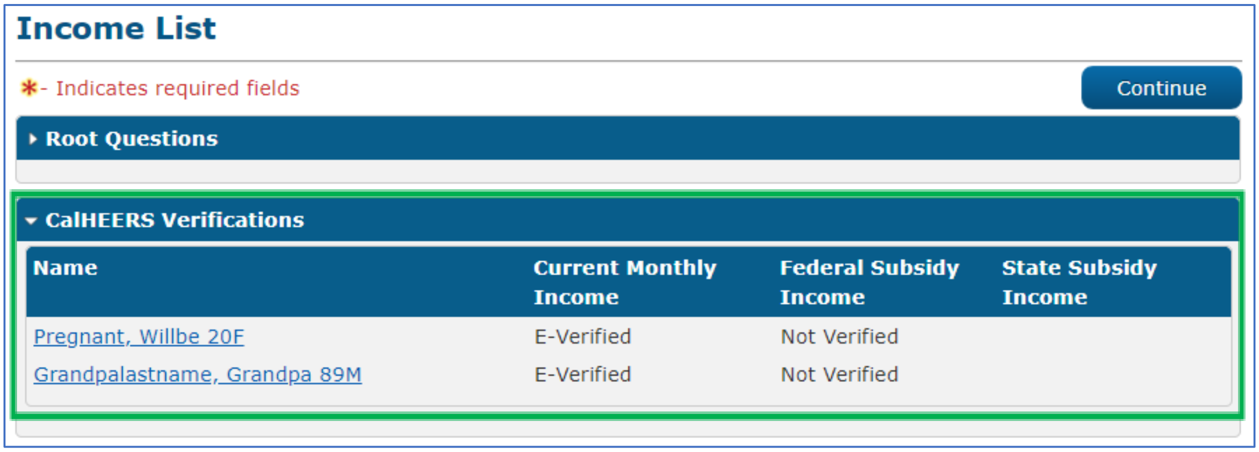


Figure 2.1.6 – 'CalHEERS Verifications' section on Income List

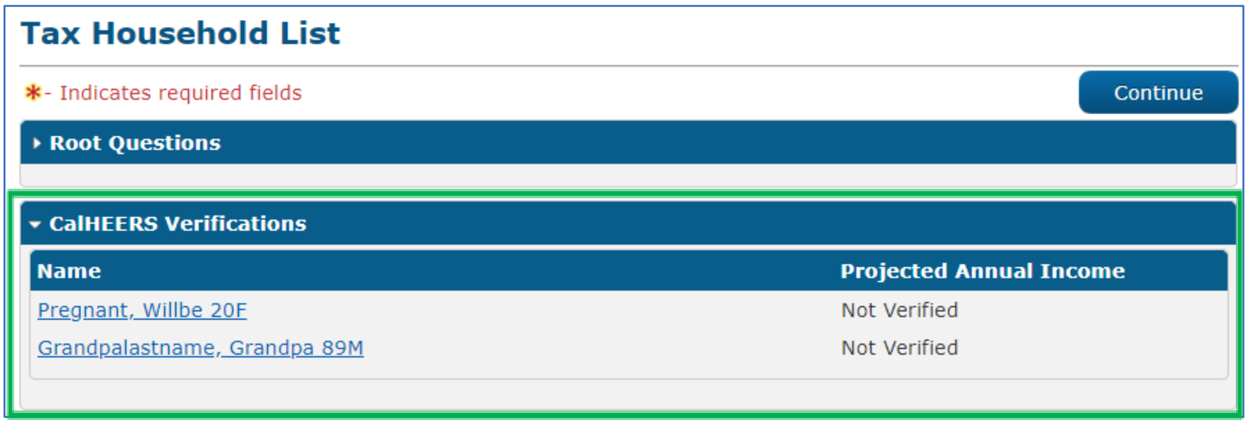


Figure 2.1.7 – 'CalHEERS Verifications' section on Tax Household List

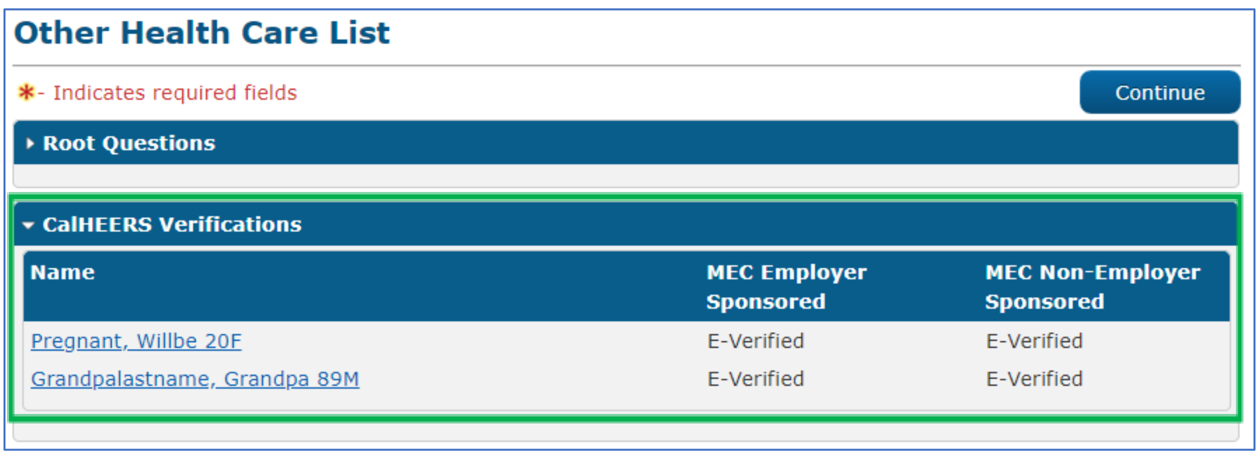


Figure 2.1.8 – 'CalHEERS Verifications' section on Other Health Care List

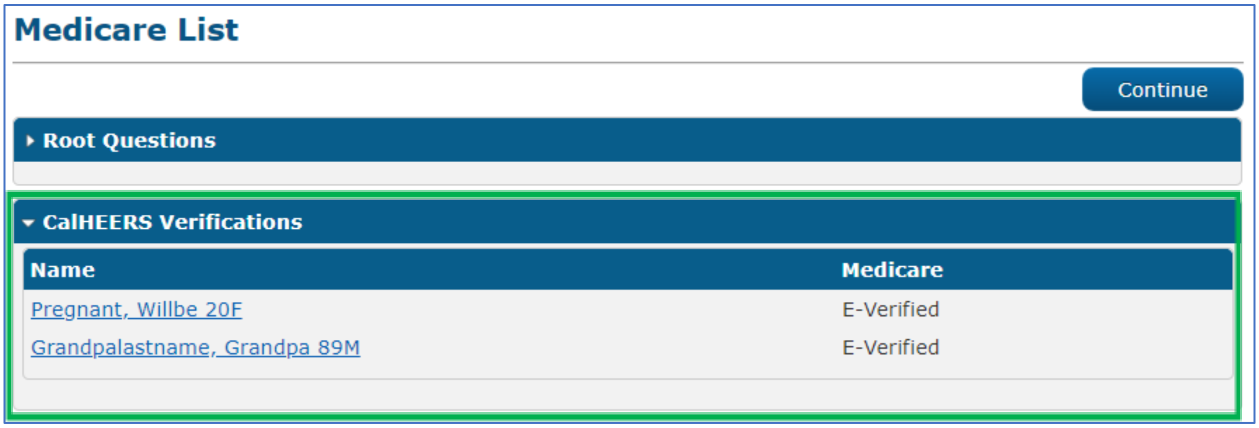


Figure 2.1.9 – 'CalHEERS Verifications' section on Medicare List

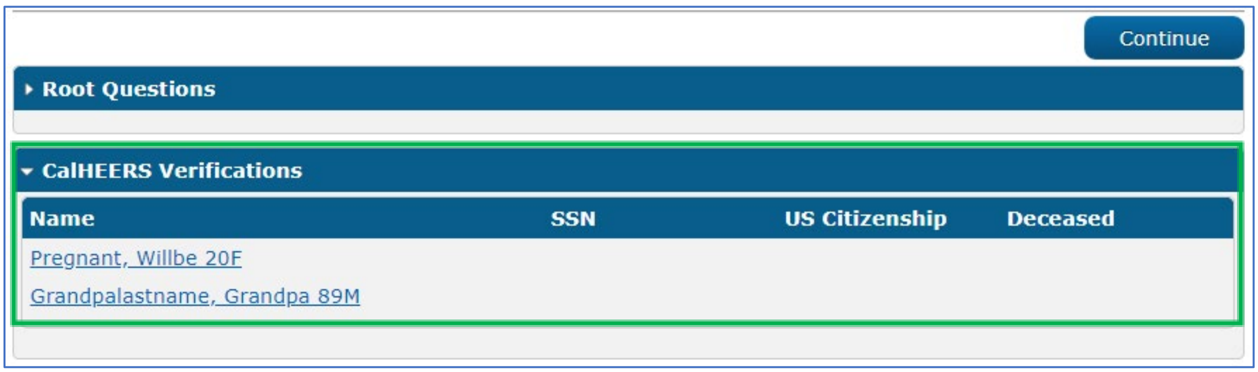


Figure 2.1.10 – 'CalHEERS Verifications' section; From the latest DER received prior to CA-213468 implementation

2.1.3 Description of Changes

1. Add a 'CalHEERS Verifications' expandable section to the data collection List pages mentioned in recommendation 2.b. The section will display for cases with a CalHEERS case linkage where the latest DER includes case persons linked in CalSAWS.
    a. Display the new section below the 'Root Questions' section.
    b. Default the section as collapsed.

2. Within the expanded 'CalHEERS Verifications' section:
    a. Add a hyperlink for the linked case person's name, which will navigate the User to the MAGI Person Detail page of the latest DER. Closing the MAGI Person Detail page will navigate the User back to the previous data collection List page.

    Note: If the latest DER did not determine eligibility for a linked case person, the section will not display a row for that person.

    b. Display the same verification types and statuses from the MAGI Person Detail page, per the following:

Data Collection List Pages	Verification Types
Individual Demographics	SSN US Citizenship Deceased
Residency	CA Resident
Citizenship Status	US Citizenship Lawful Presence Qualified Non-Citizen Five Year Bar Exempt/Met PRUCOL
Living Arrangements	Incarceration
Income	Current Monthly Income Federal Subsidy Income State Subsidy Income
Tax Household	Projected Annual Income
Other Health Care	MEC Employer Sponsored MEC Non-Employer Sponsored
Medicare	Medicare

Note: If the latest DER does not include a verification status for a specific type, display the section's status as blank below that verification type.

3. If the latest DER was received prior to CA-213468 implementation, the 'CalHEERS Verifications' section will display:
   a. The name of the linked case person as a hyperlink to navigate to the MAGI Person Detail page.
   b. The verification statuses shown as blank. Refer to Figure 2.1.10.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Create a PMCR for each List page to map values of the new 'CalHEERS Verifications' section.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2058	**Original:** The CONTRACTOR shall create a way to separate e-Verified (create, store and send) from admin verified throughout the applicable data collection pages in the CalSAWS Software. E-Verified will not be overridden by admin verified. **Revised:** The CONTRACTOR shall display CalHEERS verifications on applicable data collection pages in the CalSAWS Software.	**Original:** - e-Verifications are based on values sent from CalHEERS on a MAGI Determination (DER) and apply only to MAGI Medi-Cal. - e-Verifications can only be used by CalHEERS for MAGI Determinations and will not be used by CalSAWS for any EDBC program. - Medi-Cal EDBC rules will only use existing Admin Verifications. - e-Verifications are not sent from CalSAWS to CalHEERS. - e-Verifications are communicated in the eHIT interface to CalSAWS by CalHEERS only. - e-Verifications shown on data collection pages are only informational for the User and represent the e-	Updated LRS/CalSAWS applicable data collection List pages to display corresponding CalHEERS verifications for linked case persons.

		Verification value known at the time of the DER that created the e-Verification value. - In a DER, CalHEERS does not provide the source of the e-Verification, the date the e-Verification status was received, when the e-Verification will expire or if the e-Verification is a cached value or newly e-Verified. CalSAWS will display the e-Verification value in the DER to the worker without making any interpretations of the e-Verification value. **Revised:** - Verifications are communicated in the eHIT interface to CalSAWS by CalHEERS only. - Verifications are only used by CalHEERS for eligibility determinations and will not be used by CalSAWS for any EDBC program. - Verifications are not sent from CalSAWS to CalHEERS. - Verifications shown on data collection pages are only informational for the User and represent the Verification value known at the time when the MAGI Determination (DER) was received from CalHEERS.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207252 | DDID 1778

Updates to LRS Lobby Check-in App, Kiosk and FACT functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/01/2020	1.0	Original Document	Melissa Mendoza
7/13/2020	2.0	Updated section 2.2 with changes to the Case Number Screen	Erika Kusnadi-Cerezo
7/27/2020	3.0	Updated design document for Del 37 comment (include grammar, expanding acronyms and updated Reception Log mockup).	Erika Kusnadi-Cerezo

Table of Contents

1 OVERVIEW

The request for DDID 1778 includes expanding the LRS Lobby iOS Solution to support all 58 counties as well as migrate the Kiosk and Facilitated Access Control Tablet (FACT) applications from C-IV to LRS/CalSAWS and enable them to support all 58 counties.

1.1 Current Design

The LRS iOS Lobby Solutions were designed to work specifically for Los Angeles County. There are two lobby solutions, one that the Workers use to help assist customers in the lobby referred to as the Los Angeles County Lobby Check-in Application, and another that is a Self-Service application for the Customer to use in the lobby. They are both integrated into the Your Benefits Now (YBN) Application and have Los Angeles County specific graphics and logos.

The C-IV Kiosk and FACT are used in C-IV County office lobbies today to support the C-IV counties. The Kiosk was designed with a generic look and feel for the Customers in the lobby to use to check in and complete tasks like scanning documents. The FACT is a tablet that the Workers in the lobby use to assist Customers including checking them in for appointments.

1.2 Requests

Per DDID 1778, expand the Los Angeles County's iOS Lobby Check-in solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.

1.3 Overview of Recommendations

1. Update the LRS Lobby Check-in Application's look and feel to support all 58 counties.
2. Update the LRS Lobby Check-in Application with new webservices that will integrate into the LRS/CalSAWS system instead of YBN.
3. Migrate the C-IV lobby services and code from the C-IV system to the LRS/CalSAWS.
4. Update the FACT (FACT 1.0 and FACT 2.0) with the CalSAWS system name.

1.4 Assumptions

1. The YBN web service that supports the iOS apps will be rearchitected to work independent of the self-service portal with CalSAWS directly. Dependencies on the self-service portal and modifications to it to support the iOS apps will be part of the new self-service portal.
2. The Printing devices and Scanning devices will not change for any application.
3. Estimate includes current features in LRS iOS and C-IV Lobby/FACT applications, no additional features.
4. Transferring data is not part of this estimate as the Statewide Self-Service Portal is not within the scope of CalSAWS migration.

5. This estimate does not include the External Mobile App as the Statewide Self-Service Portal is not within the scope of CalSAWS migration.
6. The Los Angeles County's iOS solutions will require modifications and access to the C4Yourself and Benefits CalWIN Self Service Portal in order to work for the remaining 57 counties. Since the Self- Service Portal modifications are not to be included within the scope of this CalSAWS Migration DD&I Project these changes will not be estimated or accounted for. Once the CONSORTIUM identifies the approach and requirements for the Self-Service portal, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.
7. The iOS Lobby Check-in Solutions in this estimate will only be supported for Los Angeles County until the Self-Service Portal has been addressed.
8. The purchase of any new iOS device, Kiosks, or FACTs is not accounted for.
9. Additional counties electing to use the supported iOS, Kiosk, or FACT devices that currently do not utilize these devices is not accounted for.
10. Test equipment for iOS devices will continue to be provided by Los Angeles County as they are currently provided today in LRS.
11. This estimate does not account for onsite support for updates to the iOS and Kiosk systems. Support will continue to be provided how it is currently provided in the LRS and C-IV systems.
12. The LRS Self-Service Check-in iOS Application, since it is dependent on the Self-Service State-wide portal, will be updated when the Self-Service solution is completed (CA-217869).
13. The San Fernando Valley Lobby Check-in Application will not be updated as part of this effort. Any changes needed to the San Fernando Valley Lobby Check-In Application will need to be done by the Los Angeles ISD (Internal Services Department) team.
14. The C-IV Kiosk and FACT applications will retain the same functionality when moving from C-IV to LRS even if not stated in this document.
15. The following DDIDs/SCRs are needed for the Kiosk and FACT Functionality including scanning images, scanning barcodes and texting and will be implemented in a later release:
    - Tracked barcoded documents with the clock icon is part of CA-207108 (DDID 2302).
    - Scanning documents into the Kiosk with corresponding text campaign will send a text message is part of CA-207106 (DDID 2305)
    - Uploading documents from the Kiosk into Imaging is part of CA-214026 (DDID 2192).
16. The LRS Lobby Check-in Application will only support images uploaded to EDMS (Enterprise Document Management System) imaging solution until CA-214026 (DDID 2192) is implemented.

2 RECOMMENDATIONS

Update the Los Angeles County Lobby Check-in Application to support all 58 counties. Migrate the Kiosk and FACT code to the LRS/CalSAWS to support all 58 counties. Update the look and feel for the solutions to no longer be county specific and to use the new CalSAWS system name.

2.1 Los Angeles County Lobby Check-in Application

2.1.1 Overview

Configure the Los Angeles County Lobby Check-in Application to be accessible for counties outside of Los Angeles to use to check in their customers.

2.1.2 Los Angeles County Lobby Check-in Application Mockup

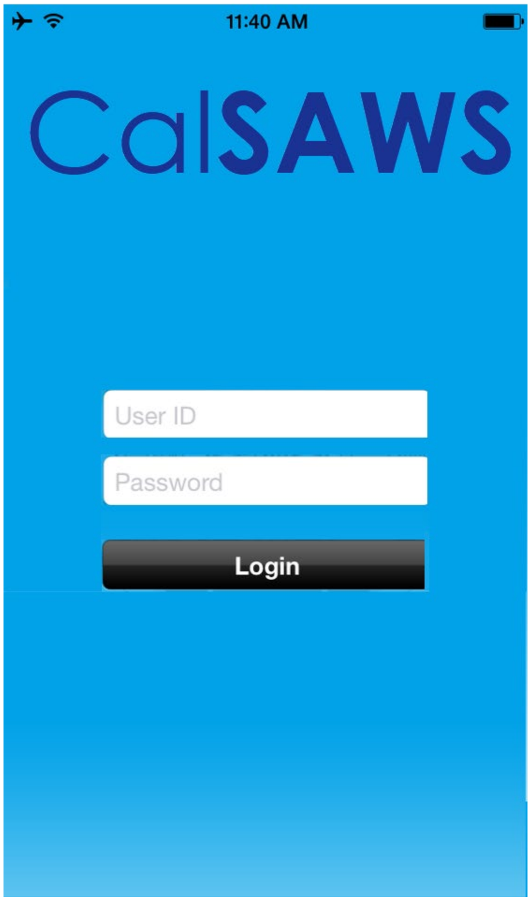


Figure 2.1.1a – Login Screen

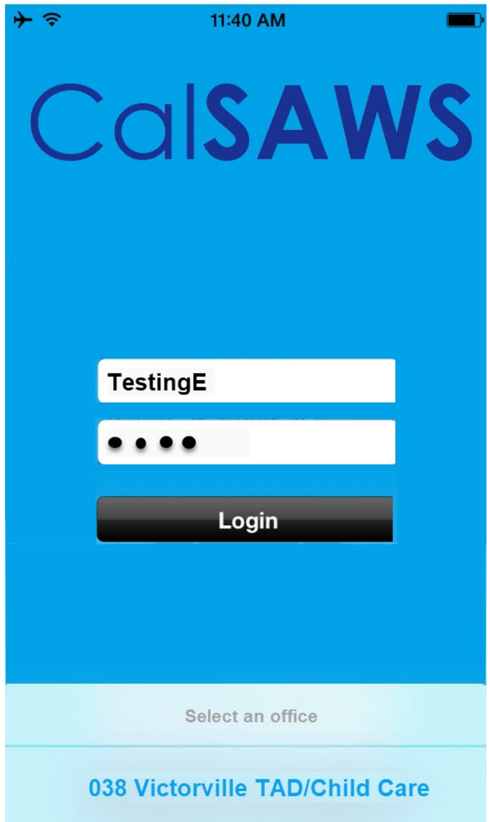


Figure 2.1.1b – Login Screen for workers outside of Los Angeles County

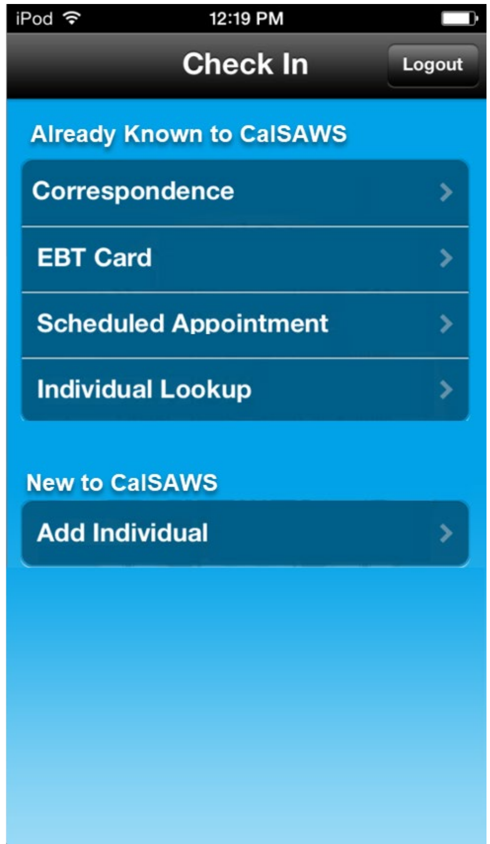


Figure 2.1.1c – Check-In Screen

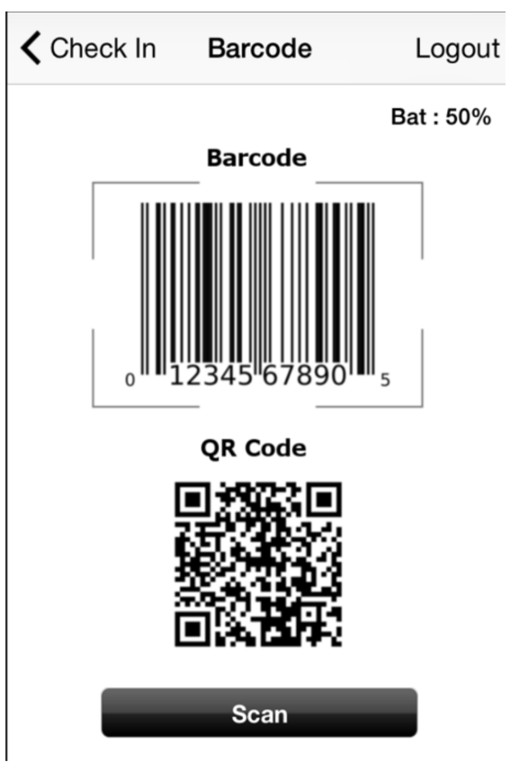


Figure 2.1.1d– Barcode Scanning Screen

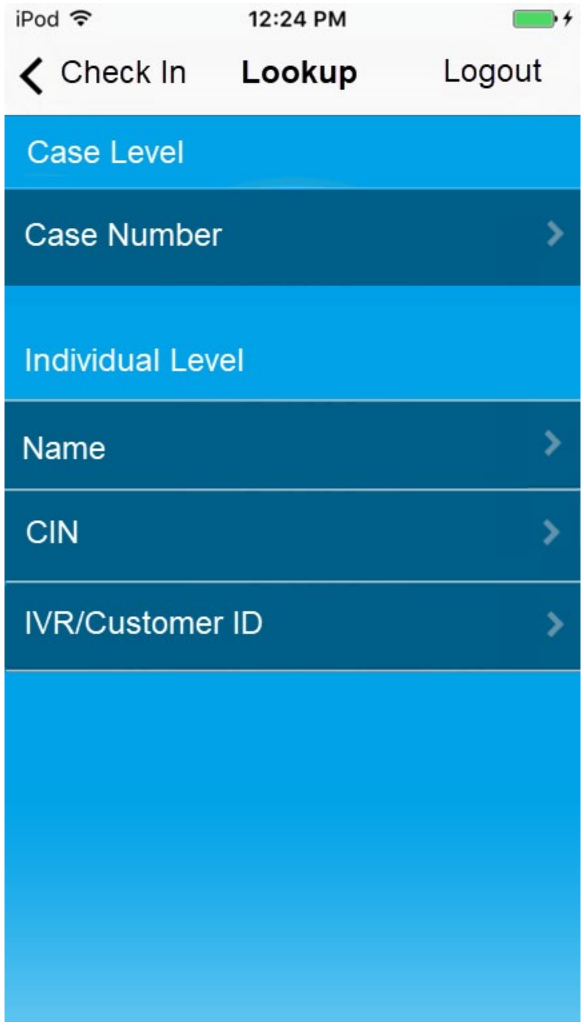


Figure 2.1.1e – Individual Lookup Screen for non-LA County users mockup

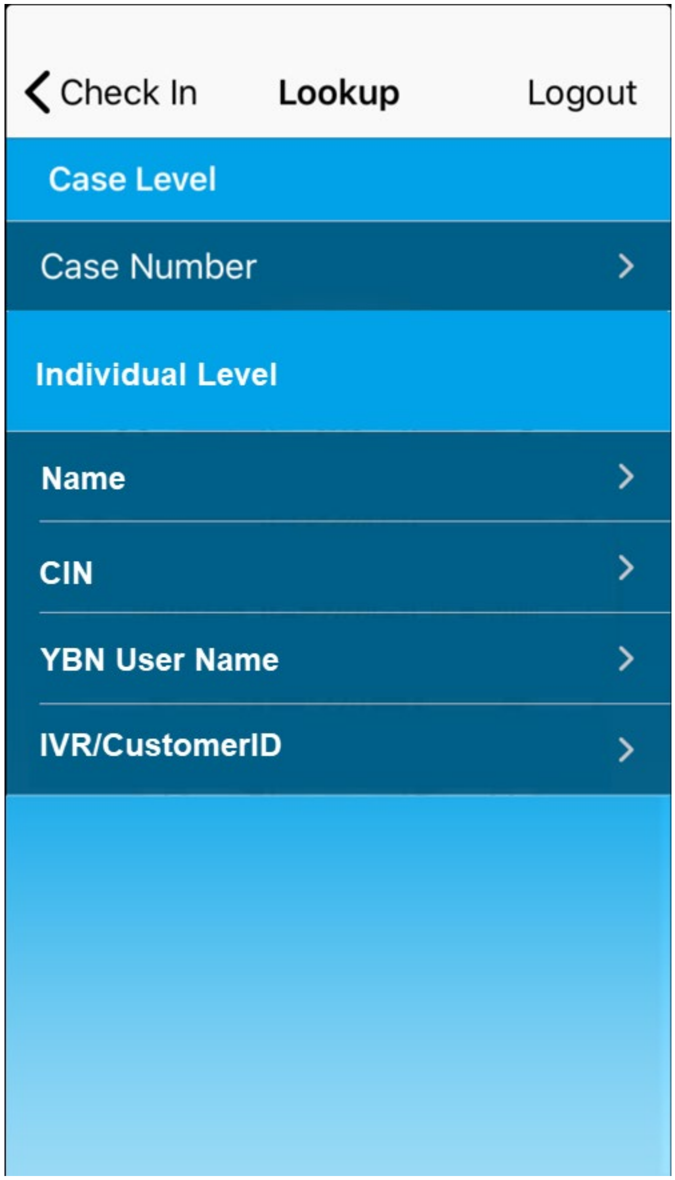
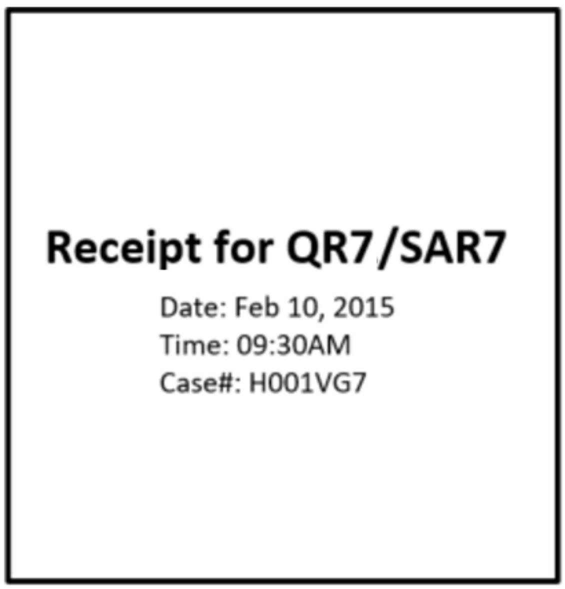


Figure 2.1.1f – Individual Lookup Screen for LA County users mockup


Receipt for Drop Off Document/s

Date: Feb 10, 2017
Time: 09:30AM
Case#: H001VG7

Figure 2.1.1g – Receipt for Drop Off Document/s


Receipt for QR7/SAR7

Date: Feb 10, 2015
Time: 09:30AM
Case#: H001VG7

Figure 2.1.1h – Receipt for QR7/SAR7


Receipt for RD/RE

Date: Feb 10, 2015
Time: 09:30AM
Case#: H001VG7

Figure 2.1.1i – Receipt for RD/RE

2.1.3 Description of Changes

1. Configure the Los Angeles County Lobby Check-in application to be accessible for counties outside of Los Angeles.
    a. Update the Los Angeles County Lobby Check-in application to allow workers outside of Los Angeles County to log in to the application using their CalSAWS credentials.
    b. Office information will continue to display after the worker login, displaying the office listing that they are associated to.
        i. Los Angeles County Lobby Check-in application will display offices outside of Los Angeles County if the worker that is logging in is associated to an office outside of Los Angeles County.
2. Remove the County of Los Angeles logo from all screen backgrounds as shown in Figures 2.1.1a through 2.1.1f
3. Add the CalSAWS system name to the top of the Login screen as shown in Figure 2.1.1a
4. Update the Check In screen as shown in Figure 2.1.1c.
    a. Relabel 'Already Known to DPSS' to 'Already Known to CalSAWS'.
    b. Relabel 'LRS Correspondence' to 'Correspondence'.
    c. Relabel 'New to DPSS' to 'New to CalSAWS'.
5. Update 'LRS – QR Code' to 'QR Code' from the Barcode screen as shown in Figure 2.1.1d.
6. Update the Individual Lookup screen as shown in Figure 2.1.1e.
    a. Hide the option to search by 'YBN Username' for workers that are logged in and accessing an office that is outside of Los Angeles County.

Note: For workers logged in accessing an office in Los Angeles County, the option to search by 'YBN Username' will remain as shown in Figure 2.1.1f.

7. Remove the 'County of Los Angeles', 'Department of Public Social Services', 'Save Time! Go On-Line!', and 'www.yourbenefits.laclrs.org' from the receipts for 'Drop Off Document/s', 'QR7/SAR7', and 'RE/RD' as shown in Figure 2.1.1g through Figure 2.1.1i.
   a. For 'Receipts for QR7/SAR7' relabel the header title 'Receipt for QR7-LA/SAR7' to 'Receipt for QR7/SAR7'.

   Note: These changes will apply to receipts being printed regardless if from the Print Receipt from the Purpose of Visit flow or from the Print Receipt from the Case Lookup flow.
8. Update the Number generation logic used for assigning a prefix and number to be stored in the LRS/CalSAWS instead of the YBN application.
   a. Apply a DCR to populate the existing prefix from YBN to the LRS/CalSAWS.

Note: The LRS Lobby Check-in Application will only support images uploaded to EDMS imaging solution until CA-214026 (DDID 2192) is implemented.

2.1.4 Page Location

- **Los Angeles County Lobby Check-in Application**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Kiosk User Interface

2.2.1 Overview

The Kiosk is a Self-Service application used in the lobby to assist customers with easy check-in and scanning documents. The Kiosk is customized using the Device Management pages in the LRS/CalSAWS that will be migrated as part of CA-207405. The Kiosk displays in English and Spanish and integrates with the Reception Log.

2.2.2 Kiosk Mockup

Figure 2.2.1 – Welcome Screen

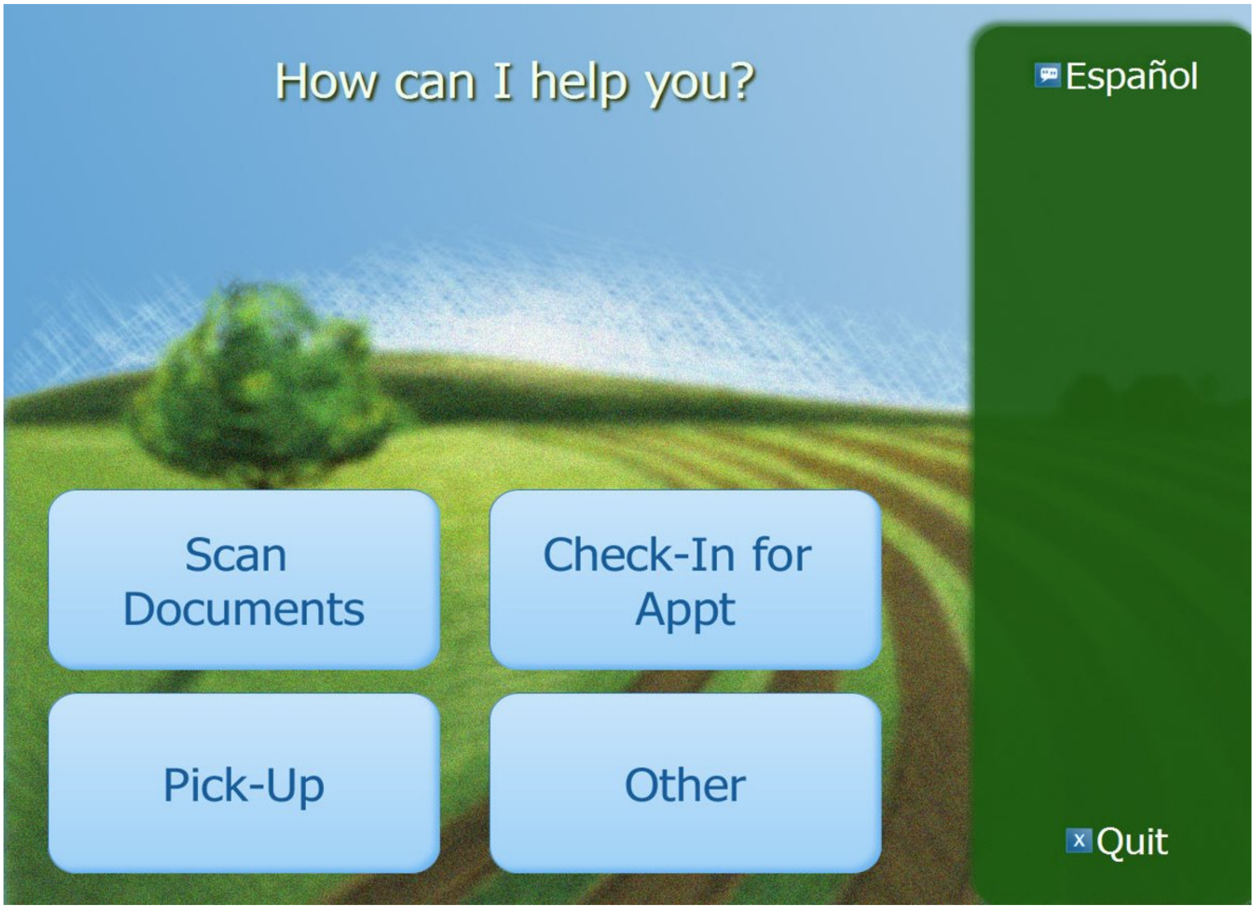


Figure 2.2.1b – Action Button Screen

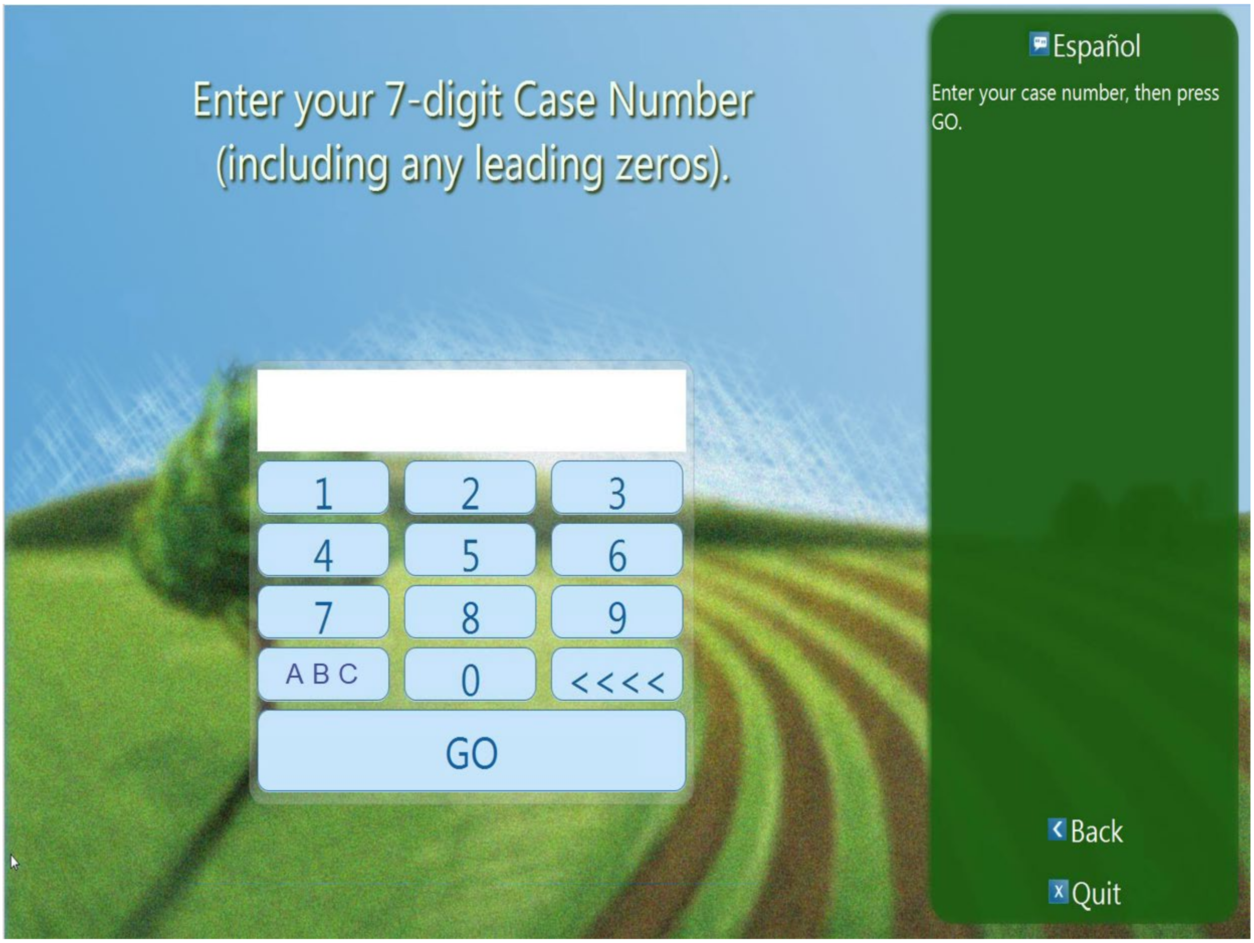


Figure 2.2.1c Case Number Screen with numbers

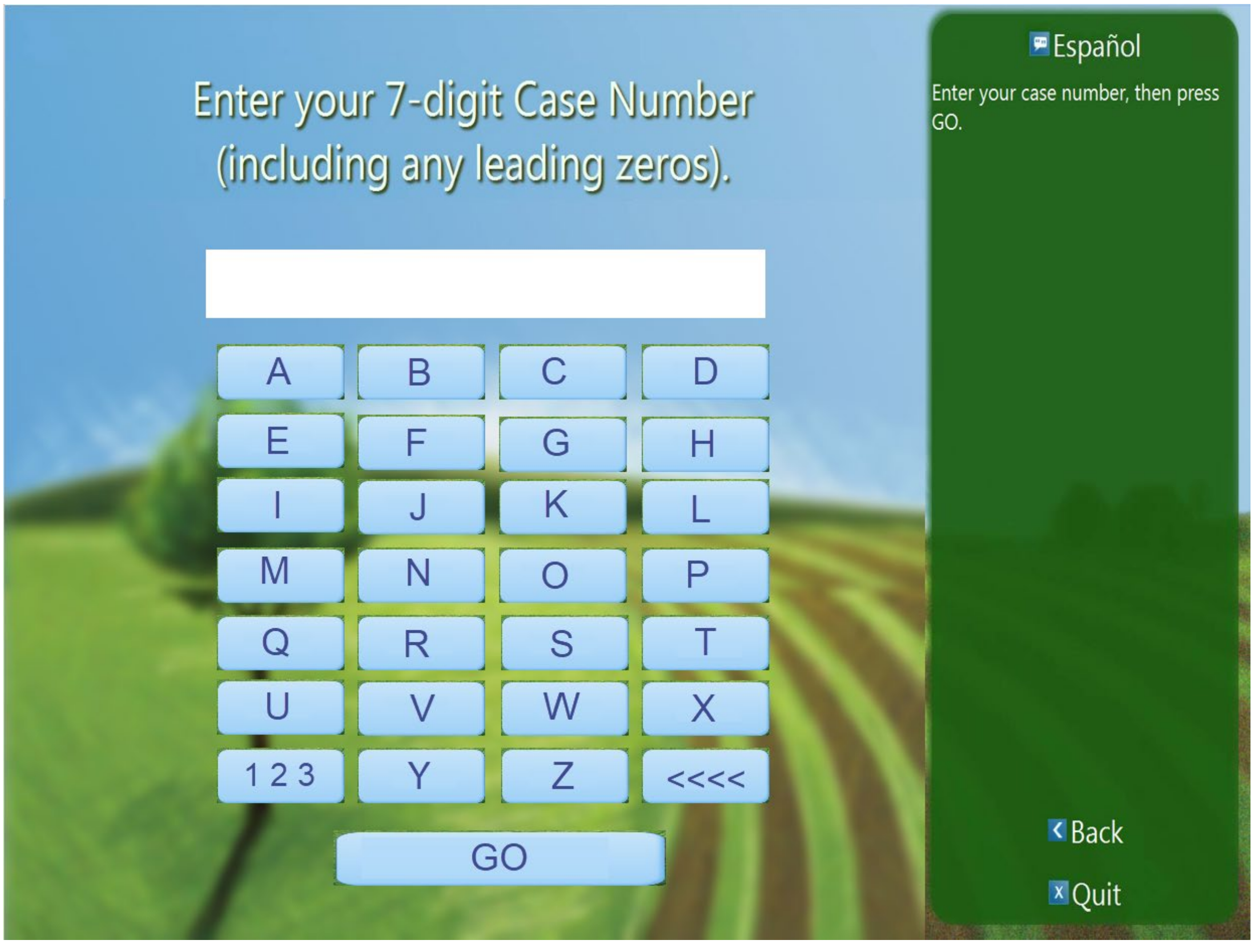


Figure 2.2.1d Case Number Screen with letters

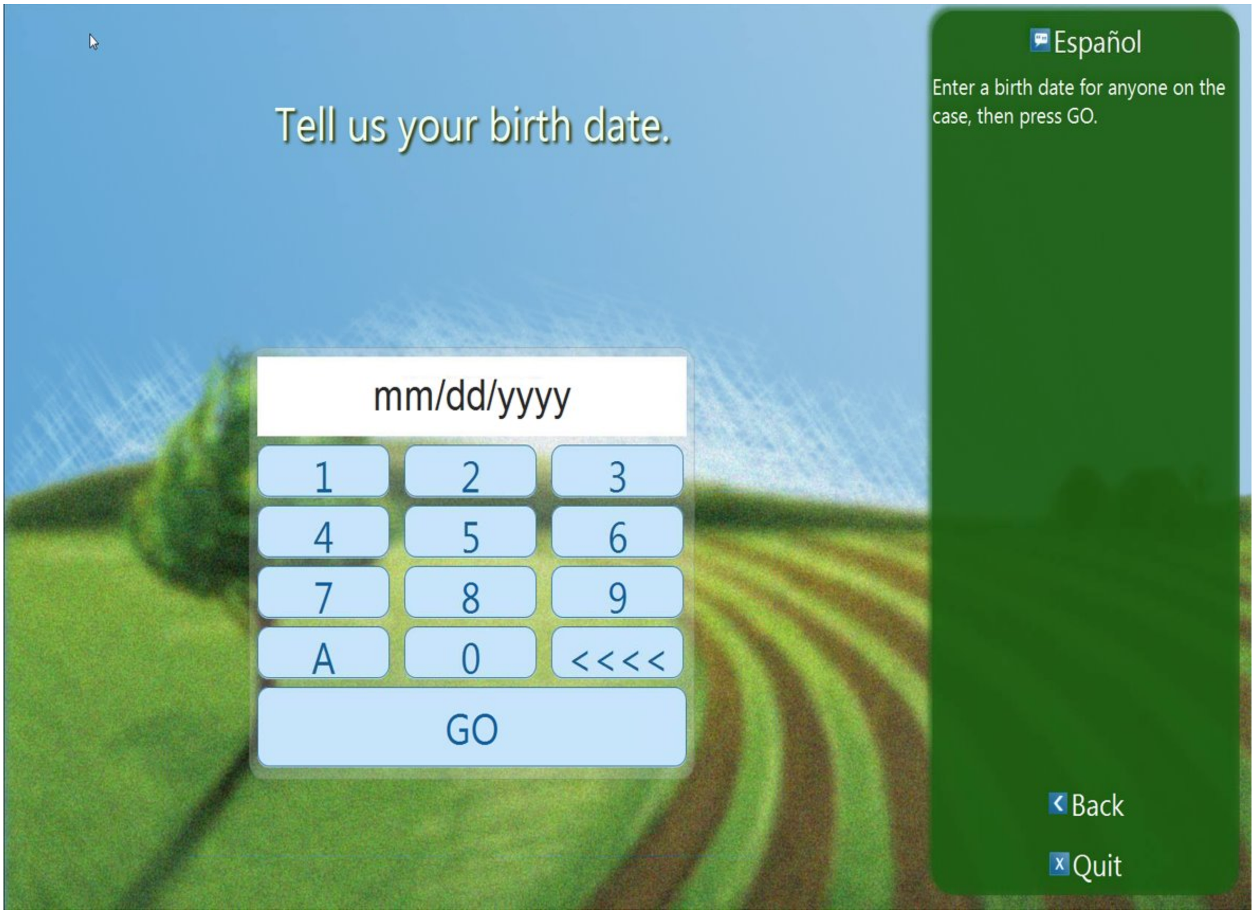


Figure 2.2.1e Birth Date Screen

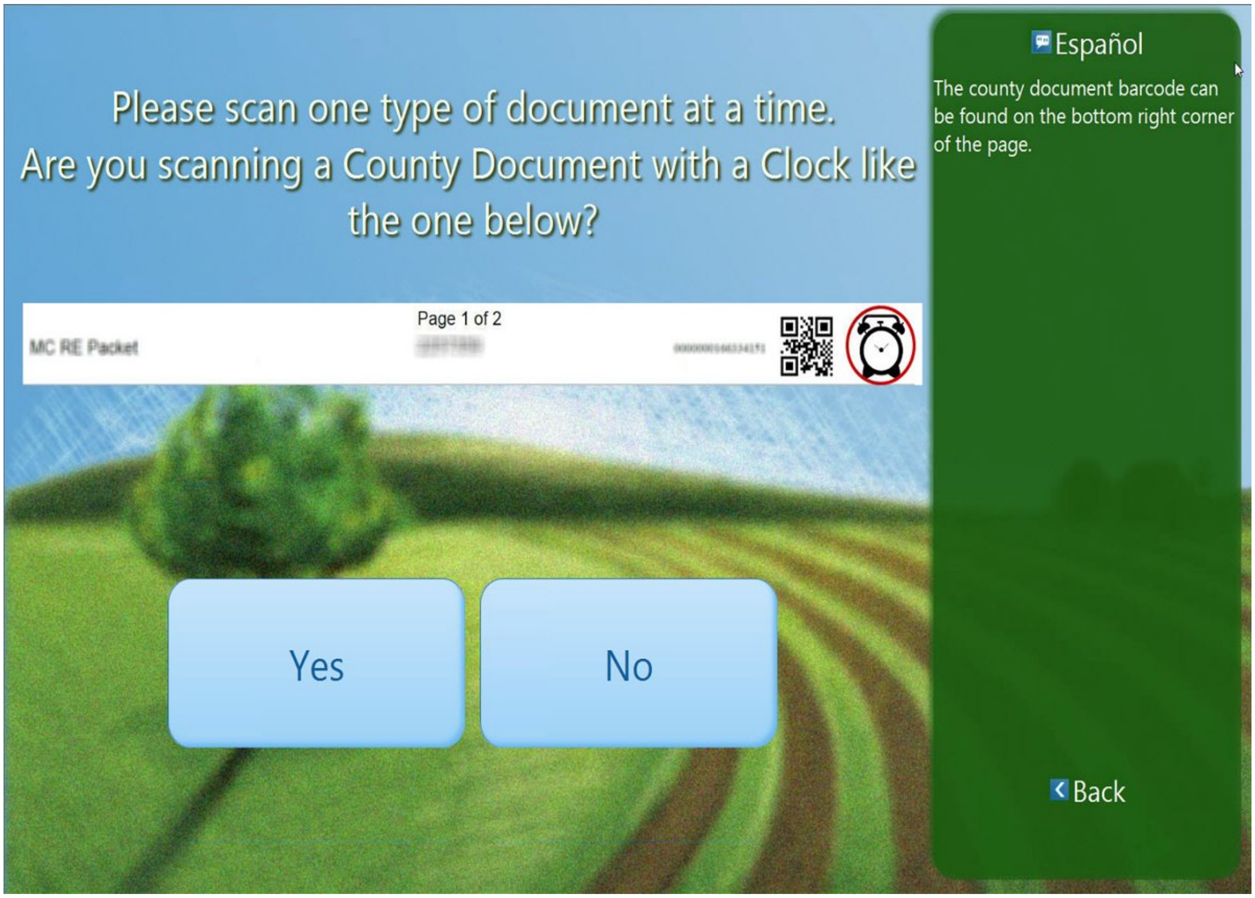


Figure 2.2.1f Document Scan Screen

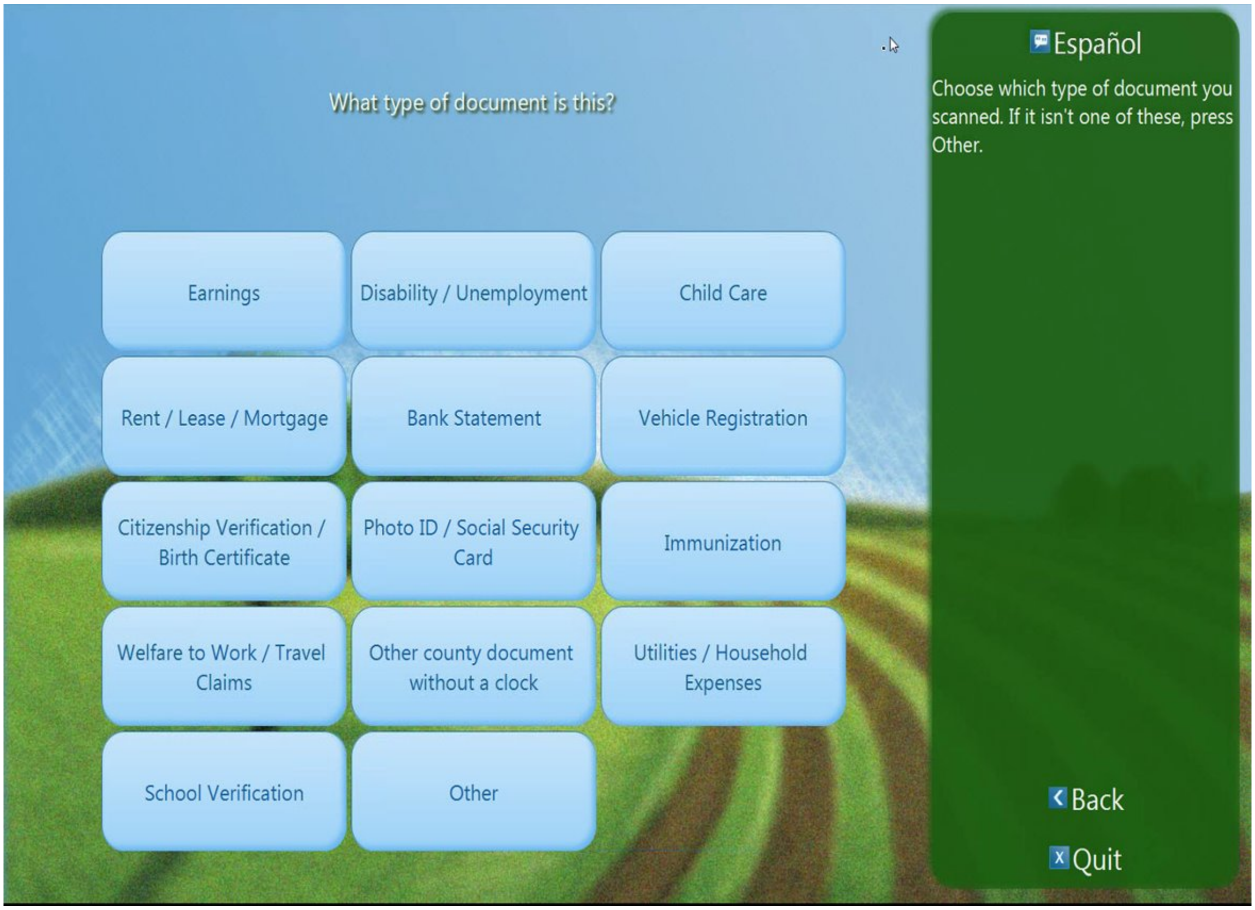


Figure 2.2.1f Document Type Screen

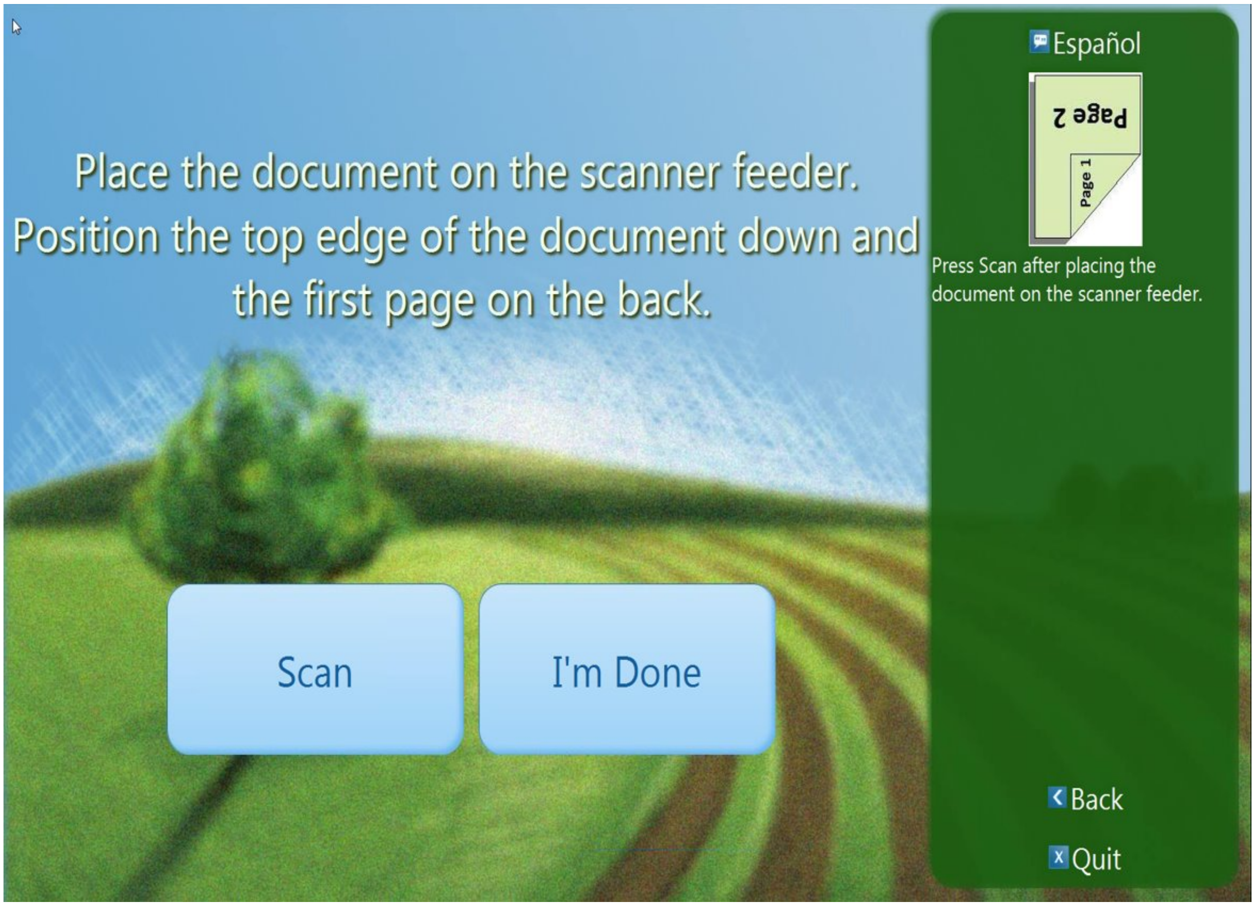


Figure 2.2.1f Document Instructions Screen

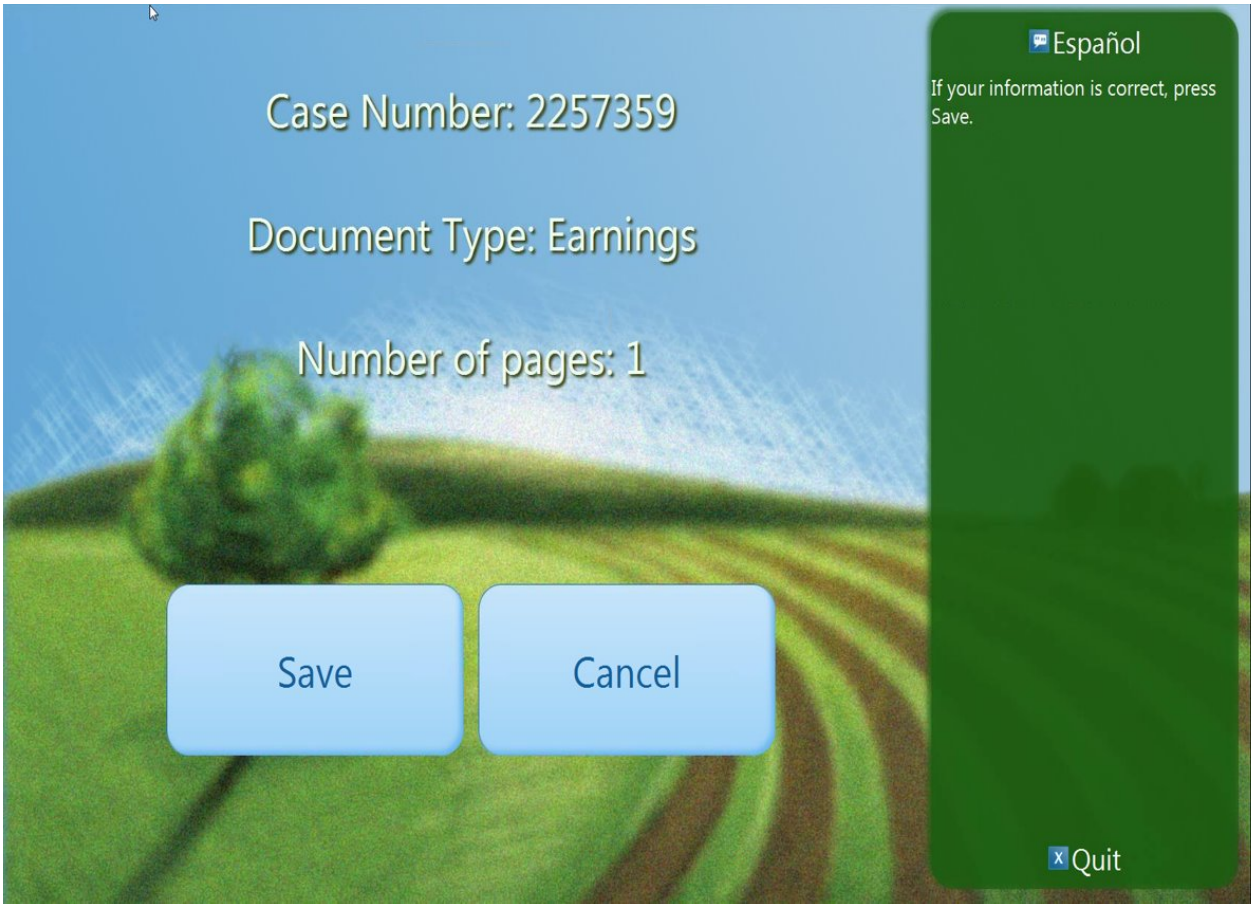


Figure 2.2.1f Document Confirmation Screen

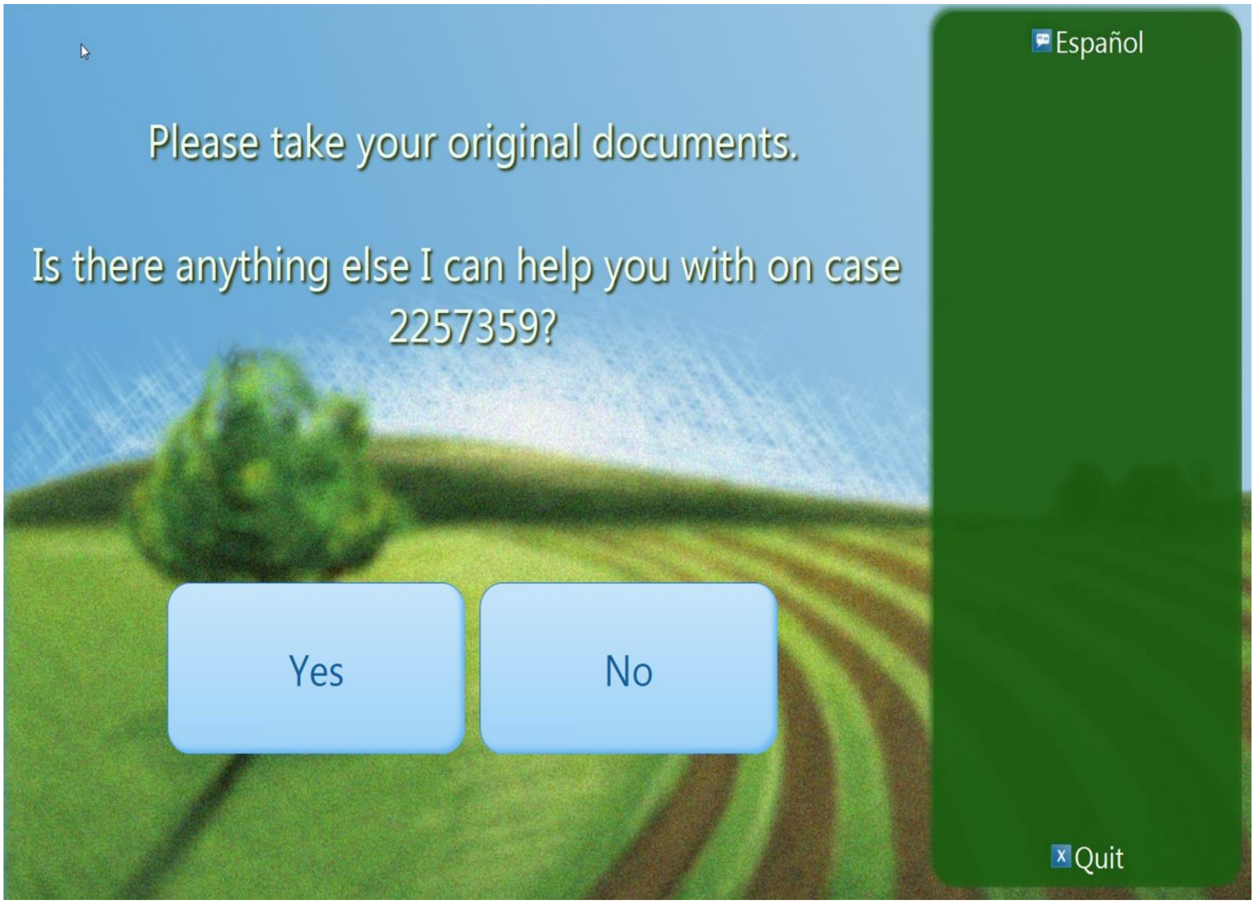


Figure 2.2.1f Document Final Screen

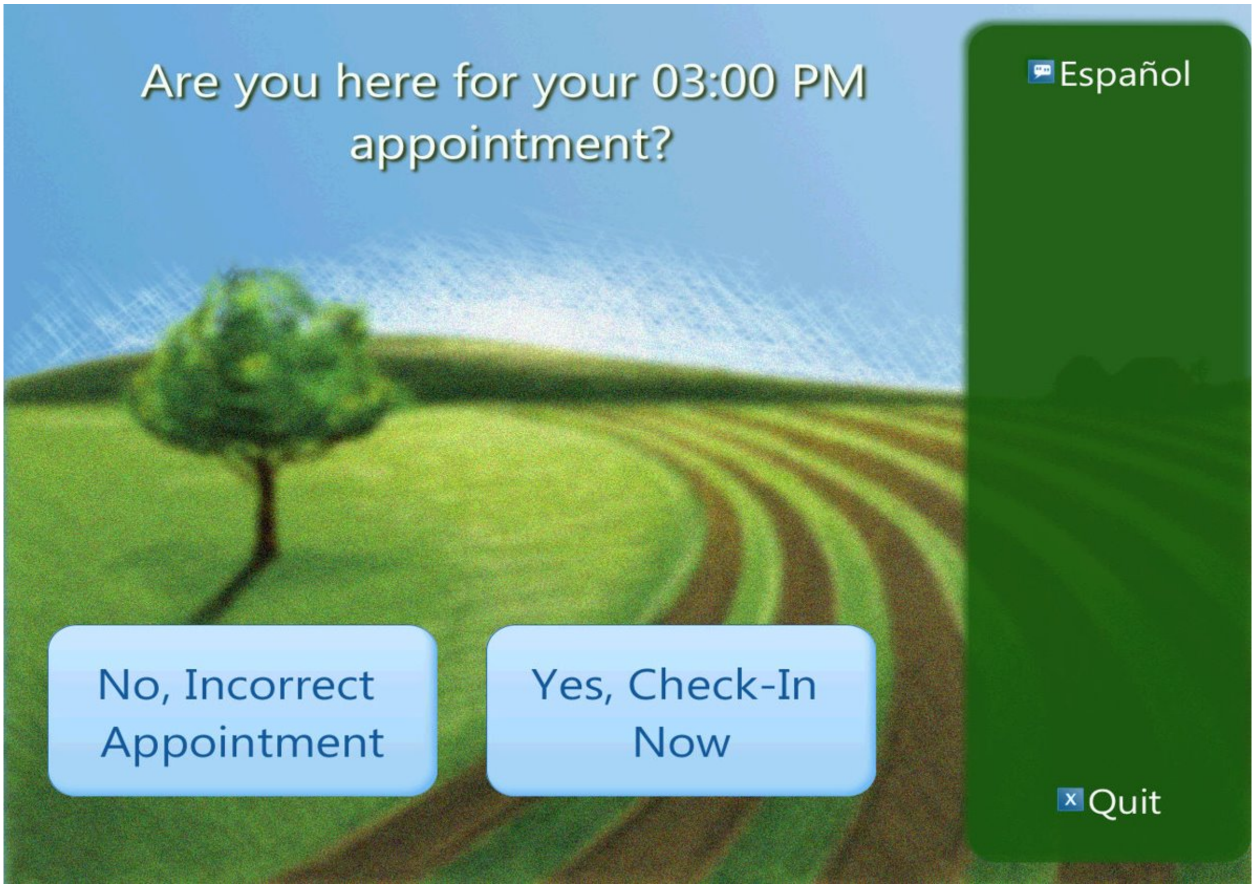


Figure 2.2.1g Appointment Check-in Screen

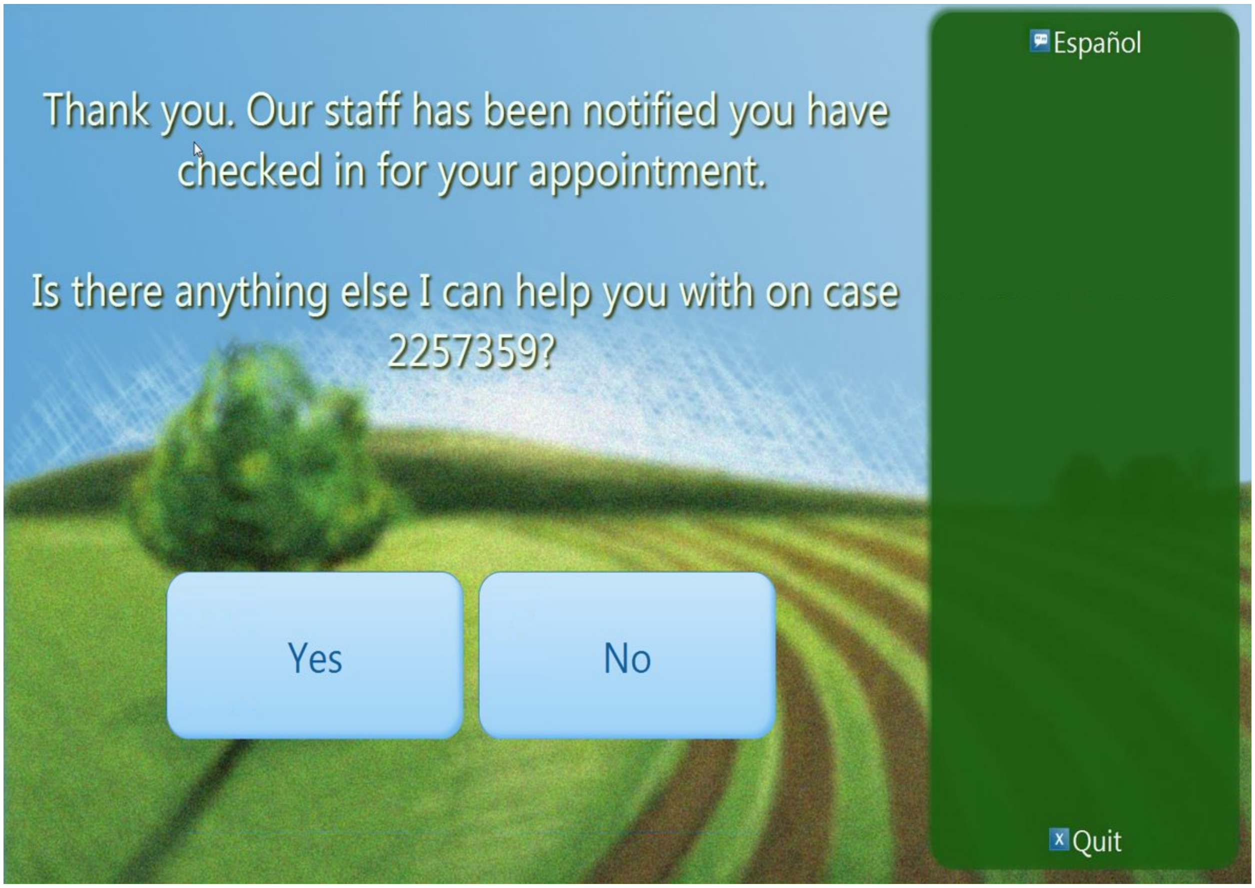


Figure 2.2.1h Appointment Confirmation Screen

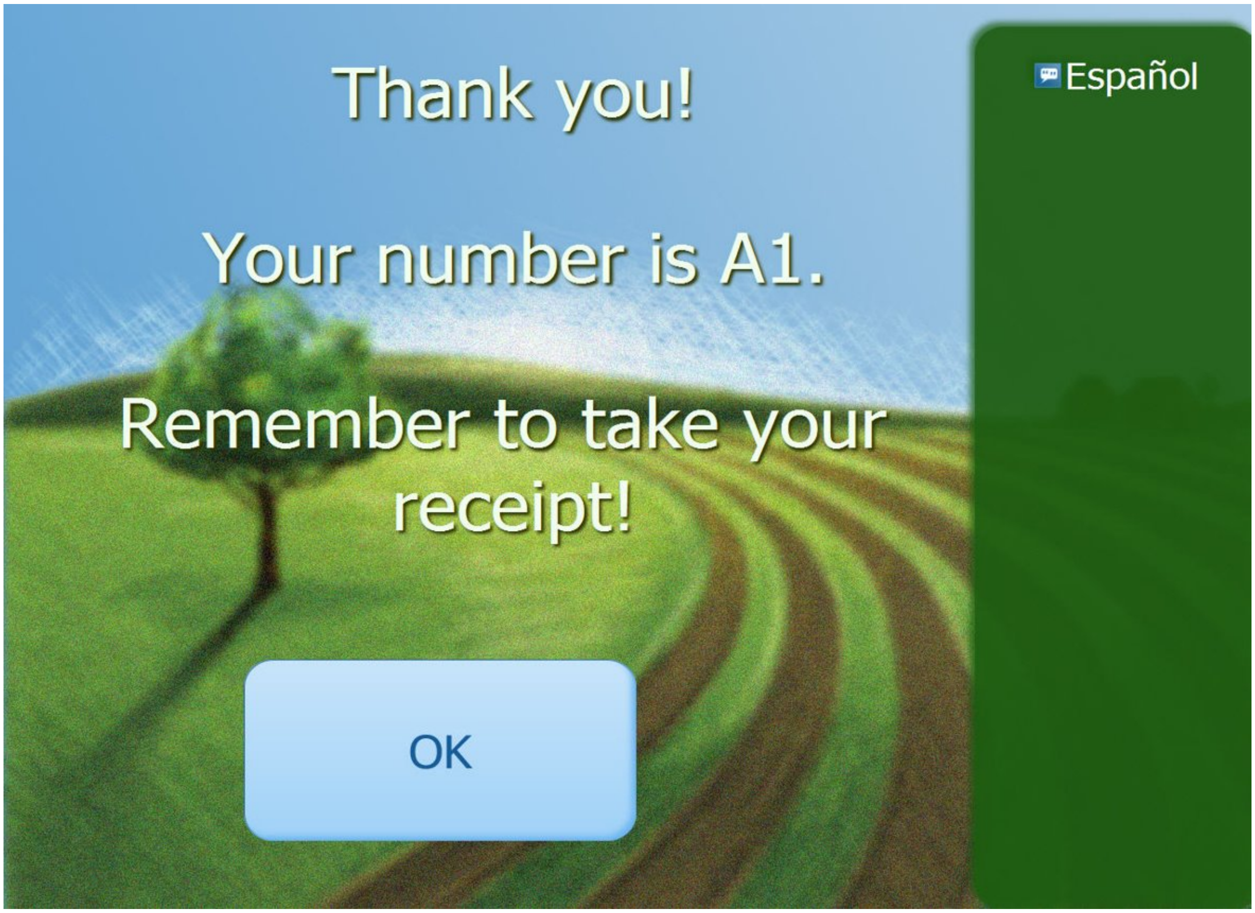


Figure 2.2.1i – Print Receipt Screen

2.2.3 Description of Changes

1. The button labels for the Action Button screen as seen in Figure 2.2.1b will be determined from the Action Detail page within the Device Flow Management page.
2. The Kiosk will authenticate the Customer using Case Number and Birthdate or EBT/BIC card for existing customers checking in.
    a. If the customer selected the Case Number/Date of Birth validation or swiped their BIC card, the name of the person identified will be used as the Person Name for the Reception Log entry.
        i. Validation for Date of Birth and Case Entry:
        Date of Birth XX/XX/XXXX does not match any person on case XXXXXXX.
    b. If the customer swiped their EBT card, the Case Name will be used as the Person Name for the Reception Log entry.

            i. Validation for EBT Card:
                1. Error reading your card.
                2. Could not find a case from your card.
    c. If the Kiosk cannot validate the case, the customer will receive the following error on the screen: "Your request cannot be processed, please check in for further assistance."
3. The "On Screen Instructions" will be determined from the Action Detail page in the Kiosk Flow Management pages.
    a. If the customer did not go through case validation, the question will display as "Is there anything else I can help you with today?"
    b. If the customer did go through case validation, the validated case will display in the question.
    c. If the customer answers the question with "Yes", navigate to the Action Selection screen maintaining the case previously verified.
    d. If the customer answers the question with "No", navigate to the Final screen.
    e. This will save the customer's actions in the Reception Log Visit Information section and print the receipt for the customer.
4. For the Print Receipt screen If any action the customer took returned a number, display the message "Your number is <Number Assigned>."
    a. If any action the customer took prints a receipt, display the message "Please take your receipt."
    b. The receipt printed will include the information for all the actions the customer took during their session. Each Visit type record that is created will be given a separate number that will be printed on the receipt.
    c. The office address printed on the receipt will be populated from the address stored in LRS/CalSAWS.
5. When scanning a document on the Kiosk, if the document being scanned is a tracked barcoded document (which displays a clock icon), the document will be marked as received on the case.
    a. The Reception Log entry created will automatically have a Completed status after Waiting.
    b. Validations for Scanning documents:
        i. Could not identify your document. Please scan again or take it to the receptionist.
        ii. Error, no pages scanned.

    Note:

    i. Updates to the tracked barcoded documents with the clock icon are part of CA-207108 (DDID 2302) which is in a later release.
    ii. When scanning documents into the Kiosk the corresponding text campaign will send a text message.

This is part of CA-207106 (DDID 2305) and is in a later release.

iii. Uploading documents from the Kiosk into Imaging is part of CA-214026 (DDID 2192) and will be in a later release.

6. When checking in for an appointment the Kiosk will search CalSAWS for scheduled and rescheduled customer appointments for the case number entered by the customer.
    a. The following customer appointment types will not be included in the search: Home Visit and Telephone Interview.
    b. If the customer entered a case number that does not have an appointment that day, display the following message:
        i. There is no appointment for your case today. Please select another option or ask for more assistance.
    c. If there is an appointment for the next day or previous day, the following message will display depending on the appointment date:
        i. There is no appointment for your case today. There is an appointment for your case tomorrow. Please select another option or ask for more assistance.
        ii. There is no appointment for your case today. There was an appointment for your case yesterday. Please select another option or ask for more assistance.
    d. If there are multiple appointments for that day, display a screen indicating the times for the appointments that day and allow the customer to select the correct appointment time.
    e. Once the customer has completed their actions on the Kiosk, the customer appointment that was selected will be updated with a status of "Showed". This status will be added to the Customer Appointment Detail page.
    f. Validations for appointments out of office:
        i. The appointment for your case is not in the office. Please select another option or ask for more assistance.
7. The Kiosk Case Number screen will be updated to display options for both letters and numbers.
    a. Update the 'A' button on the existing Case Number screen to display 'A B C' as shown on figure 2.2.1c
        i. Choosing the 'A B C' button will take the customers to the Case Number screen with the option to enter 'letters' as shown on Figure 2.2.1d.
            1. Screen will display each letter individually.
            2. Choosing the '1 2 3' button will take the customers back to the Case Number screen with the option to enter 'numbers'.
            3. Clicking the 'GO' button will take the customer to the DOB screen (this is the same process flow as existing Case Number screen).

b. Case Number information that the customer has entered will display accordingly as they go back and forth between the screens that display the two options (letters and numbers).
c. Kiosk will default to the Case Number screen that displays the option to enter numbers.

8. The Currently Unavailable screen will display when a Kiosk has not been assigned a flow or when the Kiosk is not connected to the system network.
9. The Kiosk will not allow Confidential Cases (except Employee/Employee Relative), Minor Consent or Duplicate Cases check in to the Kiosk.
    a. Confidential Cases with the type of Employee/Employee Relative will be allowed to check in using the Kiosk.

2.2.4 Page Location

N/A

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 FACT User Interface

2.3.1 Overview

The FACT allows the Worker to login using their LRS/CalSAWS credentials in order to assist customers in the lobby. This includes checking them in for appointments and scanning appointment letters. With the appropriate security right assigned, the FACT can also be used for assigning Kiosk flows.

2.3.2 FACT Mockup

Figure 2.3.1a FACT Login Screen Mockup

Figure 2.3.1b FACT Login Error Screen Mockup

Figure 2.3.1c FACT Unassociated Office Error Screen Mockup

Figure 2.3.1d FACT Home Screen Mockup w/ Configure Kiosk Option Mockup

Figure 2.3.1d FACT Home Screen Mockup without Configure Kiosk Option Mockup

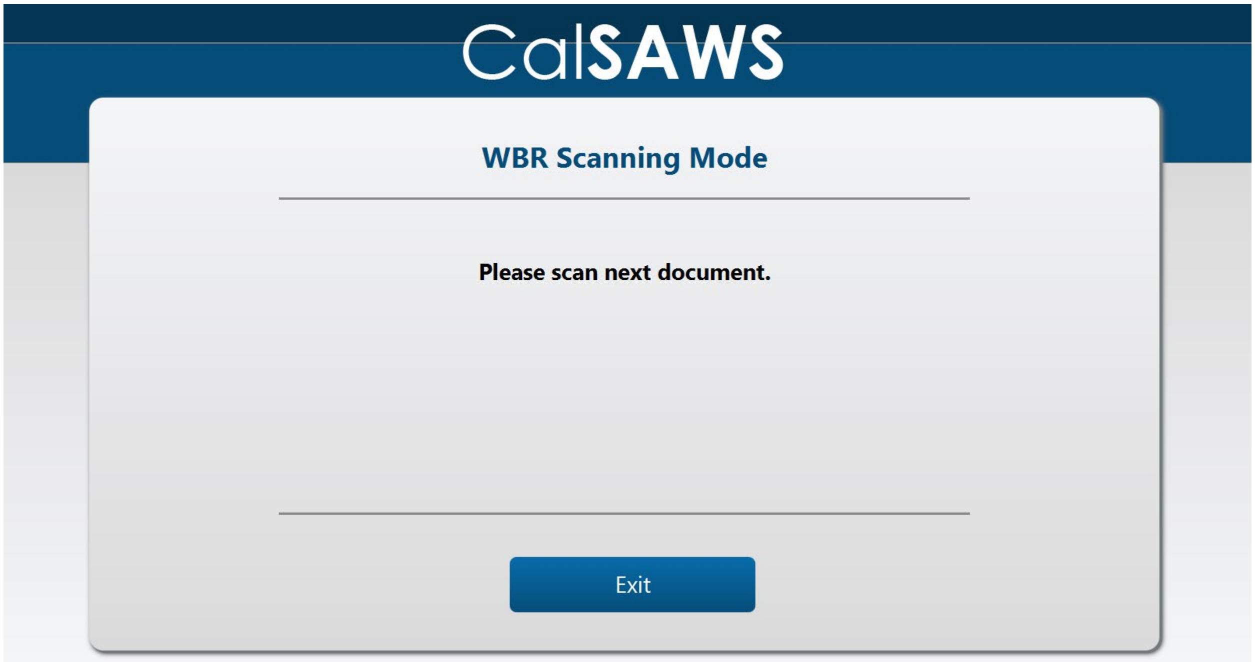


Figure 2.3.1e FACT WBR Scanning Mode Mockup

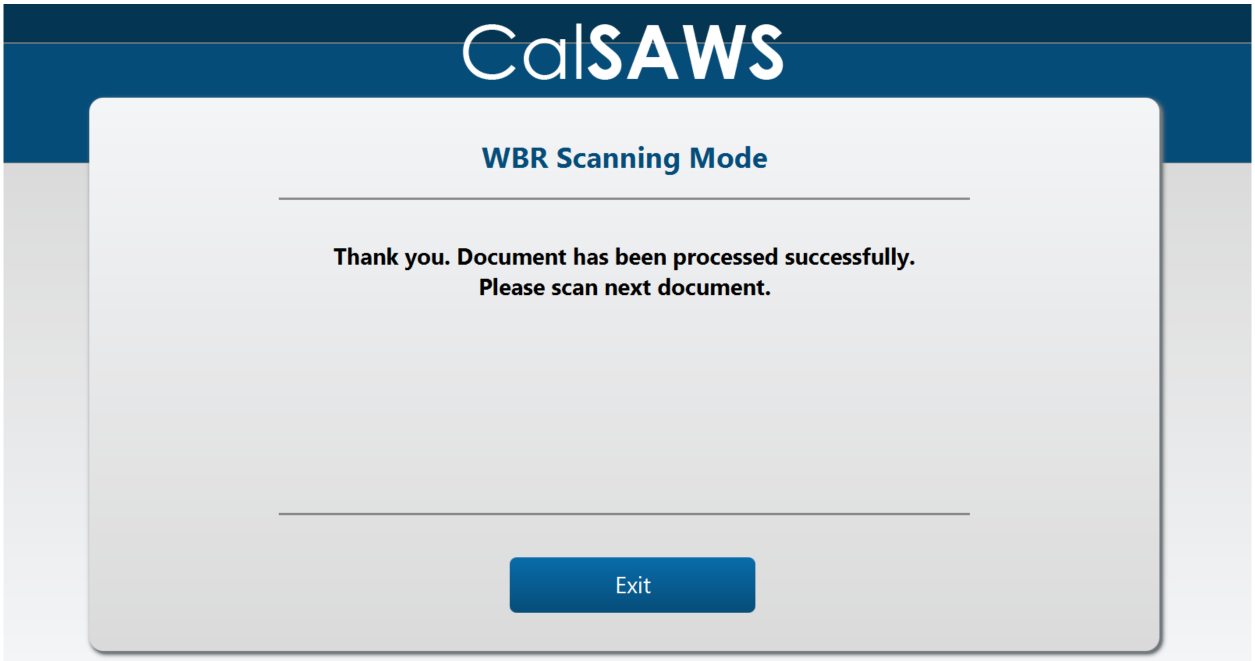


Figure 2.3.1f FACT WBR Scanning Mode Successful Mockup

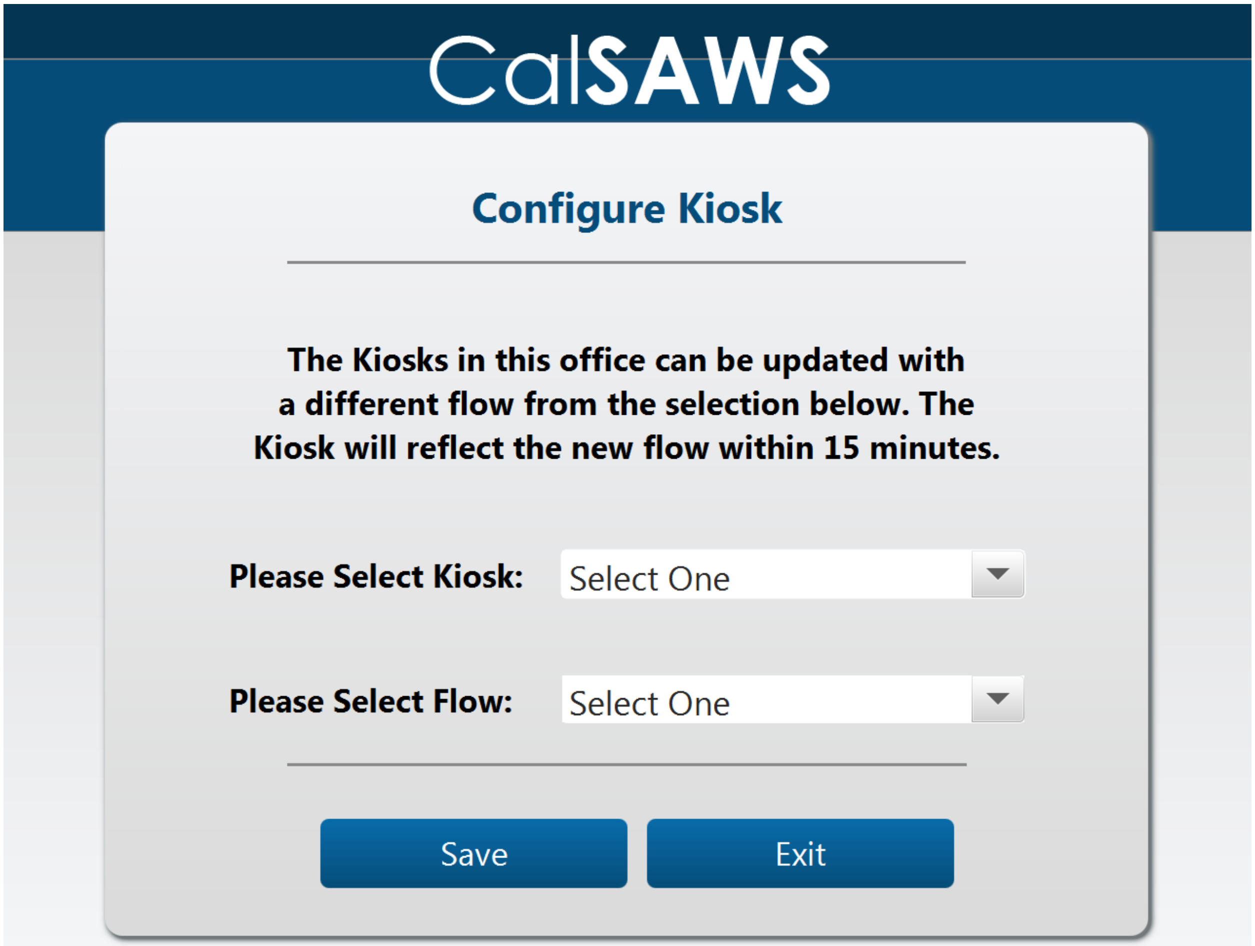


Figure 2.3.1g Configure Kiosk Mockup

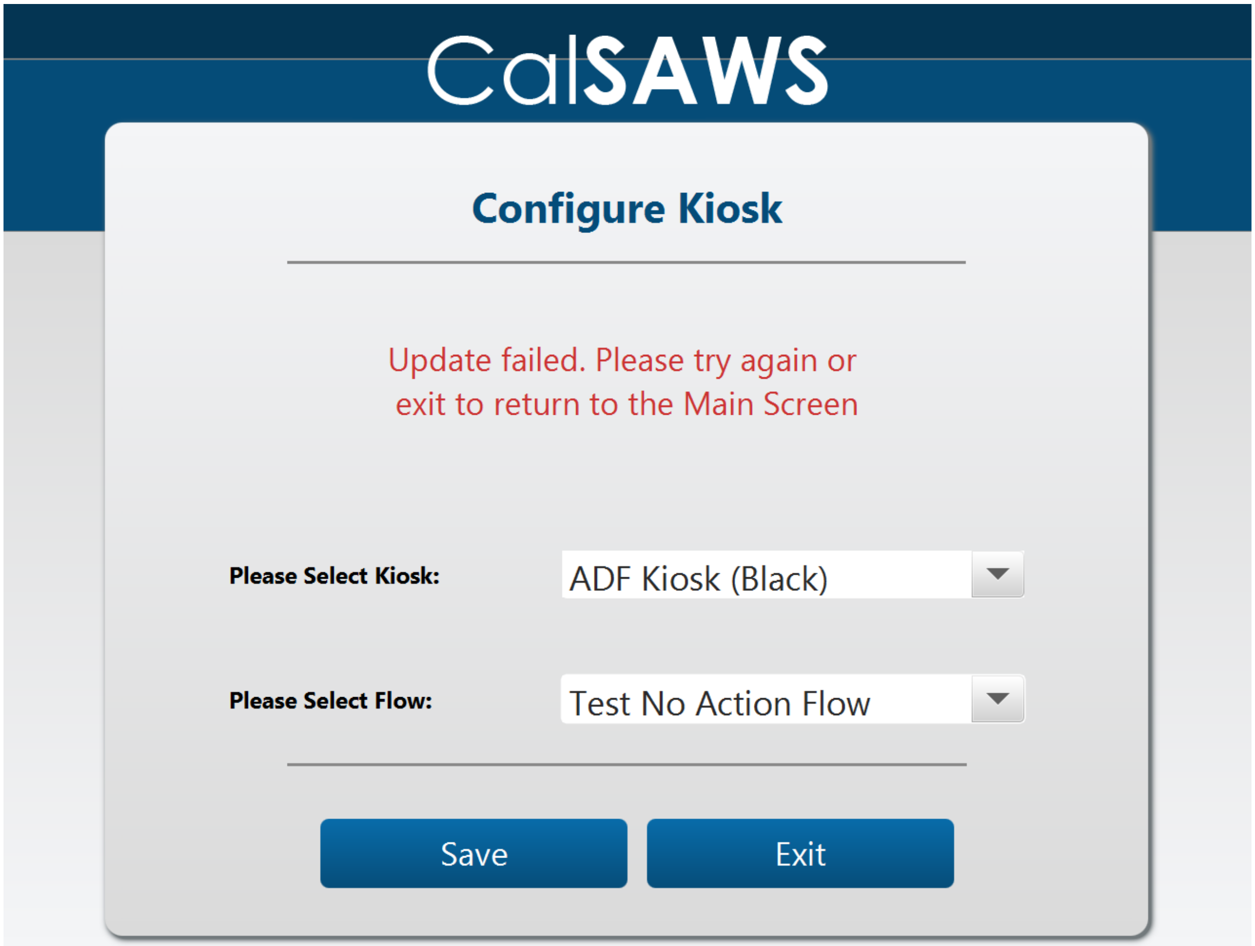


Figure 2.3.1h Configure Kiosk Error Mockup

2.3.3 Description of Change

1. Update the logo and all error verbiage from C-IV to CalSAWS.
2. The user will enter their LRS/CalSAWS credentials in order to log in to the FACT.
    a. If the login fails, the following message will display: "Login failed. Please try again or log in to CalSAWS to verify your password."
    b. If the tablet has not been associated to an office through the Device Assignment Detail page, the following message will display: "This FACT is not associated to an office. Please log in to CalSAWS and specify the office on the Device Assignment Detail page."
3. Kiosk Flow button will take the User to the Kiosk Flow that has been set up for the FACT in the Device Management pages.
    a. No Document Upload functionality is supported through the flow on the FACT. The WBR Mode will need to be used in order to mark tracked barcoded documents as received.

4. WBR button will allow a user to scan the barcode of either an appointment letter to check them in for the appointment, or a tracked barcoded document to mark the document as received in the LRS/CalSAWS by using the built-in camera in the tablet to read the barcode.
    a. A receipt will be printed based on the setting in the WBR section of the Device Assignment Detail page.
    b. A worker notification will be sent based on the WBR settings from the Device Assignment Detail page.
    c. The following messages will display when an error occurs using the WBR Scanning Mode.
        i. "Failed to initialize barcode reader." This will occur when there is an issue with the barcode reader.
        ii. "Print failed, please scan the document again." This will occur when the printer was not able to print a receipt.
        iii. "Scan failed, please scan the document again." This will occur when the scanner was not able to read the barcode.

    Note: Uploading documents from the Kiosk into Imaging is part of CA-214026 (DDID 2192) and will be in a later release.

5. Configure Kiosk button will allow a user of the FACT to change the flow that is assigned to a Kiosk.
    a. The flow of a FACT cannot be changed from this screen.
    b. The button will only display if the User logging in has the correct security rights.
    c. If the new Kiosk and Flow configuration does not get updated, the following message will display: "Update failed. Please try again or exit to return to the Main Screen."

2.3.4 Page Location

N/A

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Reception Log

2.4.1 Overview

The Reception Log Detail page displays all Visit Information for each Reception Log entry that is created. When a Customer checks in using one of the Lobby Applications, a Reception Log Detail record is created with the specified Visit Information. The Status of the visit along with how it is created is displayed in the hover over tooltip on the Status field in the Visit Information Section

2.4.2 Reception Log Detail Mockup

Time	Status	Notified Worker	Message	E-mail	Created By
10:52 AM	Kiosk Start				Kiosk
10:52 AM	Waiting				Kiosk
10:52 AM	Worker Notified	36LS06ZB05	N	N	Kiosk
10:52 AM	Worker Notified	36LS18DS0Y	Y	N	Kiosk
10:52 AM	Worker Notified		N	Y	Kiosk
11:01 AM	Complete				Melissa Breezefeather

Figure 2.4.1 Reception Log Detail Status Hover Tooltip Mockup

2.4.3 Description of Change

1. Once the customer is checked in using the Kiosk a Reception Log entry will be created with the visit type that is mapped to the button using the Device Admin pages in the LRS/CalSAWS.
    a. When checking in the Reception Log will display the Kiosk Staff record name that is associated with the Kiosk/FACT in the Created By section when hovering over the Status tooltip.
    b. The initial status record when checking in through the Kiosk flow will be Kiosk Start.
    c. The Second status when checking in will be set to Waiting except for when the Customer is only scanning documents.
    d. The number and specified prefix will display in the Number Column on the Reception Log Detail page.

Note: The Los Angeles Check-in Lobby app flow for Reception Log will not be changed.

2.4.4 Page Location

Home Page – Reception Log link

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Web Service Updates

2.5.1 Overview

The current web services for the Los Angeles County Lobby Check In application currently reside in the YBN Application. These web services will be moved to the LRS/CalSAWS since YBN is being replaced with a 58 county Self-Service Portal. The web services that support the C-IV Lobby Kiosk and FACT will be moved to the LRS/CalSAWS.

2.5.2 Description of Change

1. Create the web services in the LRS/CalSAWS to support the Los Angeles County Lobby Check In application used by County Workers to check in customers. See Supporting Documents Section 1 for detailed web service information.
2. Create the web services in the LRS/CalSAWS to support the C-IV Lobby Kiosk and FACT applications. See Supporting Documents Section 2 for detailed web service information.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Online	List of web services to be removed from YBN and created in LRS/CalSAWS to support the LA County Lobby Check-In application.	DDID 1778 LRS App Web Services.xlsx
2	Online	List of Web Services required for porting the C-IV Kiosk and FACT to LRS/CalSAWS.	DDID 1778 CIV Lobby Web Services.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1778	**Original:** The CONTRACTOR shall expand the Los Angeles County's iOS solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties. **Revised:** The CONTRACTOR shall expand the Los Angeles County's iOS Lobby Check-in solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.	- The YBN web service that supports the IOS apps will be rearchitected to work independent of the self-service portal with CalSAWS directly. Dependencies on the self-service portal and modifications to it to support the iOS apps will be part of the new self-service portal. - The Printing devices and Scanning devices will not change for any application. - Estimate includes current features in LRS iOS and C-IV Lobby/FACT applications, no additional features. - Transferring data is not part of this estimate as the Statewide Self-Service Portal is not within the scope of CalSAWS migration. - This estimate does not include the External Mobile App as the Statewide Self-Service Portal is not within the scope of CalSAWS migration. - The Los Angeles County's iOS solutions will require modifications and access to the C4Yourself and Benefits CalWIN Self Service Portal in order to work for the remaining 57 counties. Since the Self- Service Portal modifications are not to be included within the scope of this CalSAWS Migration D&I Project these changes will not be estimated or accounted for. Once the CONSORTIUM identifies the approach and requirements for the Self Service portal, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for	Updated the LRS iOS solution to include the CalSAWS system name and support all 58 counties. Migrated the existing C-IV Kiosk and FACT applications to the CalSAWS system.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		approval through the County Change Control Board process. - The iOS Lobby Check-in Solutions in this estimate will only be supported for Los Angeles County until the Self-Service Portal has been addressed. - The purchase of any new iOS device, kiosks, or FACTs is not accounted for. - Additional counties electing to use the supported iOS, kiosk, or FACT devices that currently do not utilize these devices is not accounted for. - Test equipment for iOS devices will continue to be provided by LA County as they are currently provided today in LRS. - This estimate does not account for onsite support for updates to the iOS and Kiosk systems. Support will continue to be provided how it is currently provided in the LRS and C-IV systems.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207399 | DDID 1039

Migrate C-IV RE Packets for CW and CF

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/14/2020	1.0	Initial Revision	Rainier Dela Cruz
07/27/2020	1.1	Updates from Deliverable comments.	Rainier Dela Cruz
08/05/2020	1.2	Updates from Build comments.	Rainier Dela Cruz

Table of Contents

1 OVERVIEW

1.1 Current Design

In C-IV, the system will automatically generate and send out a CalFresh (CF) Recertification (RE) Packet to a CF recipient one month before the RE is due. The system will also automatically generate and send out a CalWORKs (CW) RE Packet to a CW recipient one month before the RE is due. Lastly, the system will automatically generate and send out a CW/CF RE Packet to a recipient receiving both CW and CF one month before the RE is due.

In LRS/CalSAWS, minimal information is generated out of the system for CF and CW RE Packets, as Los Angeles County has a process in place for 'pre-stuffed' packets. Only Los Angeles County will continue to use the pre-stuffed RE Packets. When the packets are not received, the CalFresh and CalWORKs programs are discontinued through automated batch processes. The PB00E139 batch job will discontinue CalFresh programs. The PB00E141 batch job will discontinue CalWORKs programs. Both batch jobs are configured to run for all counties.

1.2 Requests

Per DDID 1039, migrate the C-IV CF RE Packet, CW RE Packet, and the CW/CF RE Packet to LRS/CalSAWS for the 57 Migration Counties. Migrate the C-IV CF RE Packet, CW RE Packet, and the CW/CF RE Packet batch jobs to automatically generate and send out the packets for the 57 Migration Counties.

1.3 Overview of Recommendations

1. Migrate the C-IV CF RE Packet to LRS/CalSAWS. The packet will contain the following forms: CF Coversheet with Business Reply Mail (BRM) and National Voter Registration Act (NVRA) Voter Preference Form, CF 29, CF 37, EBT 2216, SAR 7A, PUB 13, PUB 275, PUB 388 and Voting Registration Card (VRC).

2. Migrate the C-IV CW RE Packet to LRS/CalSAWS. The packet will contain the following forms: CW Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5, CW 101, EBT 2216, SAR 7A, PUB 13, PUB 183/PUB 184, PUB 388, CW 52 and VRC.

3. Migrate the C-IV CW/CF RE Packet to LRS/CalSAWS. The packet will contain the following forms: CW/CF Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5, CW 101, EBT 2216, SAR 7A, PUB 13, PUB 275, PUB 183/PUB 184, PUB 388, CW 52, and VRC.

4. Migrate the C-IV CF RE Packet, CW RE Packet, and the CW/CF RE Packet batch jobs.

1.4 Assumptions

1. The existing CF, CW and CW/CF RE Packets in LRS/CalSAWS will be made available only to Los Angeles County users. There are no other changes to existing RE Packets. The new packets being added with this SCR will only be available to the 57 Migration Counties. **SCR CA-214197** will update the Template Repository to display correspondence based on County.
2. Only the English and Spanish version of the CF RE, CW RE, and CW/CF RE packets will be implemented with this system change request. The threshold version of the packet will be implemented with **SCR CA-216900**.
3. The Medi-Cal (MC) Redetermination packets will not be addressed as part of this system change request. DHCS is in the process of revising all MC RE Packets, which will be introduced with **SCR CA-216432**.
4. The CSF 105 will be migrated to LRS/CalSAWS with **SCR CA-214990**.
5. The CF 29 will be migrated to LRS/CalSAWS with **SCR CA-211772**.
6. The CW 2166 will be migrated to LRS/CalSAWS with **SCR CA-215516.**
7. The EBT 2216 will be migrated to LRS/CalSAWS with **SCR CA-215513**.
8. The PUB 388 will be migrated to LRS/CalSAWS with **SCR CA-215118**.
9. Central Print testing will not be possible at this time. The current Central Print vendor does not have the envelopes used to mail out the C-IV RE packets. Central Print testing can be done once a new Central Print vendor is selected and stocks of envelopes are available.
10. The VRC will not be inserted when the CF RE, CW RE, or CW/CF RE packets are printed centrally. The current Central Print vendor does not have stock of the VRCs. The VRCs will be inserted once a new Central Print vendor is selected and stocks of VRCs are available.
11. Enclosure functionality will be implemented with **SCR CA-216057**.
12. The bundling job is only available for LA County. The bundling jobs for the Migration Counties will be migrated with **SCR CA-207312,** therefore testing of the bundles is not possible at this time.
13. The Spanish version of the PUB 183 is the PUB 184. When the PUB 183 is generated in Spanish from Template Repository, it will generate the PUB 184. When the packets are generated in Spanish, the PUB 184 will be in the packet instead of the PUB 183.
14. The new RE Packets for the Migration Counties will follow existing functionality on the Customer Reporting page as the existing RE Packets used by Los Angeles County, including Status.
15. The recertification appointments will be scheduled by the worker before the RE packets are generated.
16. Imagining and portal testing cannot be done until the imagining and portal solutions for CalSAWS has been determined.

2 RECOMMENDATIONS

2.1 New Recertification Packet Header

2.1.1 Overview

The outgoing envelope that will be used to mail out the new RE packets is the 6”x10” Flat Mail Envelope. The address windows on the envelope are in a different location from the envelopes currently used in LRS/CalSAWS. A new header will be created to align the office address and recipient’s mailing address to the address windows on the envelope.

2.1.2 Description of Change

Create a new header that will be used for the new CF RE, CW RE, and CW/CF RE packets. The Mailed From address will be on the upper left, the case information fields will be on the upper right. The Mail-To address will be on the left side below the Mail From address.

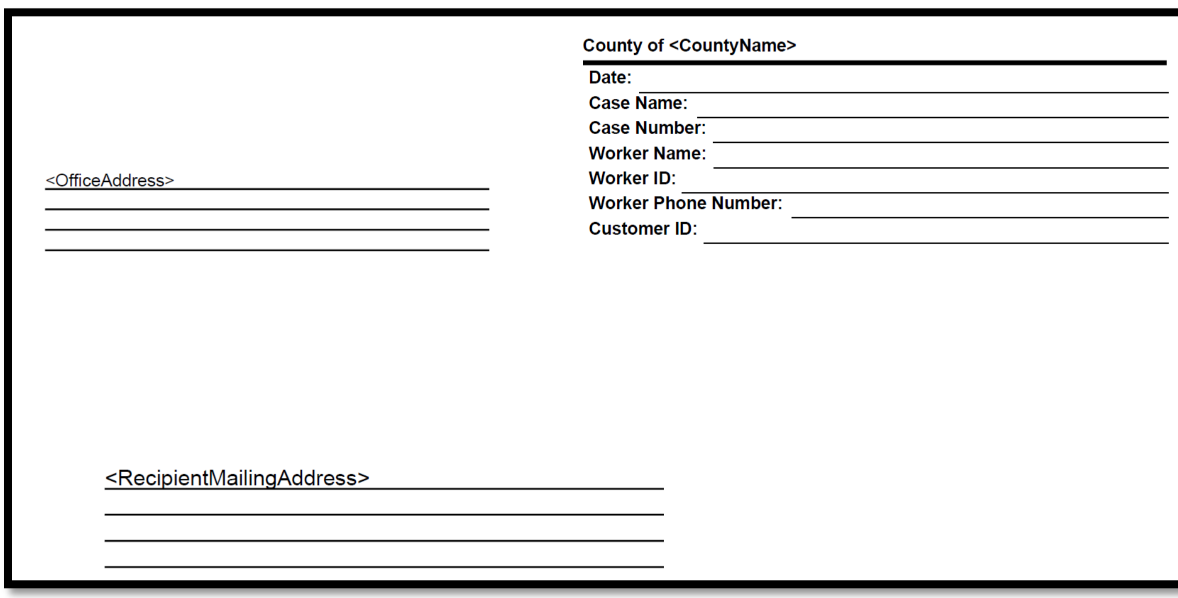


Figure 2.1.2.1 – New RE Packet Header

2.2 Add the Spanish PUB 275

2.2.1 Overview

Currently in LRS/CalSAWS, the PUB 275 is only available in English. The form is included in the CF RE packet, which will be generated in English and Spanish. Therefore, the PUB 275 in Spanish will be added to LRS/CalSAWS.

State Form: PUB 275 (04/07)

Programs: CalFresh, CalWORKs

Attached Forms: N/A

Forms Category: Forms

Current Languages: English

2.2.2 Description of Change

1. Create the PUB 275 in Spanish.

   Form Header: N/A

   Form Footer: N/A

   Form Title: California Family Planning Information and Referral Services

   Form Number: PUB 275

   Include NA Back 9: No

   Form Mockup/Example: Please refer to **Section 3.0 Supporting Documents #6.**

2.3 Add the Spanish CCP 7

2.3.1 Overview

Currently in LRS/CalSAWS, the CCP 7 is only available in English. The form is included in the CW and CW/CF RE packets, which will be generated in English and Spanish. Therefore, the CCP 7 in Spanish will be added to LRS/CalSAWS.

State Form: CCP 7 (10/19)

Programs: CalWORKs, Child Care

Attached Forms: N/A

Forms Category: Forms

Current Languages: English

2.3.2 Description of Change

1. Create the CCP 7 in Spanish.

   Form Header: CalSAWS Header

   Form Footer: CalSAWS Footer

   Form Title: CalWORKs Child Care Request Form and Child Care Payment Rules

   Form Number: CCP 7

Include NA Back 9: No

Form Mockup/Example: Please refer to **Section 3.0 Supporting Documents #7.**

2.4 Update the PUB 13 Version

2.4.1 Overview

The current version of the PUB 13 in LRS/CalSAWS is 6/11. Update the PUB 13 to the 8/16 version.

State Form: PUB 13 (8/16)

Programs: Welfare-to-Work

Attached Forms: N/A

Forms Category: Forms

Current Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Korean, Russian, Filipino/Tagalog, Vietnamese

2.4.2 Description of Change

1. Update the PUB 13 to the 8/16 version.

   Form Header: N/A
   Form Footer: CalSAWS Footer
   Form Title: Your Rights Under California Welfare Programs
   Form Number: PUB 13
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Documents #8.**

2.5 Update the CW 2184 Version

2.5.1 Overview

The current version of the CW 2184 in LRS/CalSAWS is 7/11. Update the CW 2184 to the 8/16 version.

State Form: CW 2184 (8/16)

Programs: CalWORKs

Attached Forms: N/A

Forms Category: Forms

Current Languages: English, Spanish

2.5.2 Description of Change

1. Update the CW 2184 to the 8/16 version.

   Form Header: N/A
   Form Footer: CalSAWS Footer
   Form Title: CalWORKs 48-Month Time Limit
   Form Number: CW 2184
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Documents #9**

2.6 CalFresh Recertification Packet

2.6.1 Overview

This section will describe the migration of the C-IV CF RE packet to LRS/CalSAWS. The packet will only be available to the 57 Migration Counties.

CalFresh Recertification Packet: CF Coversheet with BRM and NVRA, CF 29 (10/13), CF 37 (11/16), EBT 2216 (03/19), SAR 7A (12/14), PUB 13 (08/16), PUB 275 (04/07), PUB 388 (8/17) and VRC.

Existing Language: English, Spanish

2.6.2 Description of Change

1. Create a new CalFresh RE packet coversheet. The coversheet will have the new header described in **Section 2.1** on the first page and the BRM and NVRA on the second page. For the mockup of the CF Coversheet, please refer to **Section 3.0 Supporting Documents #1.**

2. Create the CF RE Packet with the forms in the following order: CF Coversheet with BRM and NVRA, CF 29, CF 37, EBT 2216, SAR 7A, PUB 13, PUB 275, and PUB 388.

   Note: The VRC is inserted at the Print Center and not part of the source file that will be implemented in the system.

Form	Page Number
Coversheet	1-2
CF 29	3
CF 37	4-14

EBT 2216	15-16
SAR 7A	17-18
PUB13	19-20
PUB 275	21-22
PUB 388	23-30

3. Add the CF RE Packet to Template Repository for the 57 Migration Counties.
    a. **Form Number:** CF RE Packet
    b. **Form Name:** CalFresh Recertification Packet
    c. **Category:** Application
    d. **Program:** CalFresh
    e. Include the following parameters for the packet on the Document Parameters page:
        i. Case Number
        ii. Customer Name
        iii. Program
        iv. RE Month
        v. Language

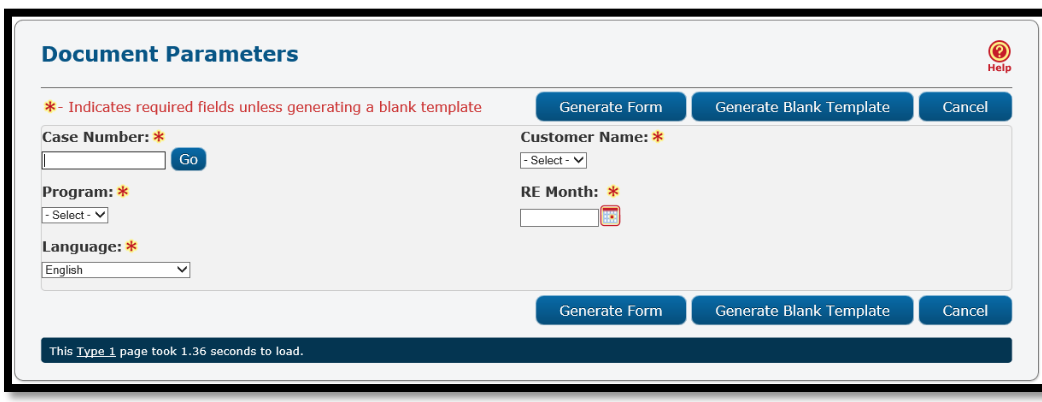


Figure 2.2.2.1 – Document Parameters Page

    f. Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a CF RE Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'.

4. Add population logic for the CF RE Packet.
    a. The variables will be populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CF RE Packet – Page 1 – Coversheet	**County Name**	This field will be populated with the county name based on the case number.	Y	Y	Y
CF RE Packet – Page 1 – Coversheet	**Office Address**	This field will be populated with the office address of the worker assigned to the program. If the program does not have a worker, it will use the default address based on the county.	Y	Y	Y
CF RE Packet – Page 1 – Coversheet	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CF RE Packet – Page 1 – Coversheet	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y
CF RE Packet – Page 1 – Coversheet	**Case Number**	This field will be populated with the case number of the current case.	Y	Y	Y
CF RE Packet –	**Worker Name**	This field will be populated with the name of the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Coversheet		worker assigned to the program. If the program does not have a worker, it populate with 'Customer Rep'.			
CF RE Packet – Page 1 – Coversheet	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y	Y
CF RE Packet – Page 1 – Coversheet	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. If the program does not have a worker, it will use the default phone number based on the county. The phone number will have the following format: (###) ###-####	Y	Y	Y
CF RE Packet – Page 1 – Coversheet	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CF RE Packet – Page 1 – Coversheet	**Recipient Mailing Address**	This field will be populated with the mailing address of the primary	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		applicant when generated through batch or the person select in the Customer Name dropdown on the documents parameter page when generating from Template Repository.			
CF RE Packet – Page 2 – Coversheet	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Completion Date**	This field will be populated with the CalFresh recertification due date.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Telephone Interview Checkbox**	The checkbox will be checked if the person has a telephone appointment.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Telephone Appointment Date**	This field will be populated with the date of the telephone appointment.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Telephone Appointment Time**	This field will be populated with the time of the telephone appointment.	Y	Y	Y
CF RE Packet –	**Telephone Number**	This field will be populated with the phone	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 3 – CF 29		number of the person. Format: (999)999-9999			
CF RE Packet – Page 3 – CF 29	**In-person Interview Checkbox**	This checkbox will be checked when the person has an in-person interview.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**In-person Interview Appointment Date (field on the same line as the checkbox)**	This field will be populated with the date of the in-person interview.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**In-person Interview Appointment Date (field below the checkbox)**	This field will be populated with the date of the in-person interview.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**In-person Interview Appointment Time**	This field will be populated with the time of the in-person interview.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Office Name**	This field will be populated with the office name where the in-person interview will take place.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Office Address**	This field will be populated with the office address where the in-person interview will take place.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CF RE Packet – Page 3 – CF 29	**City**	This field will be populated with the city name.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**State**	This field will be populated with the State name.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Zip Code**	This field will be populated with the zip code.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**No Telephone Number Checkbox**	This check box will be checked when the person has a phone interview and does not have a phone number listed.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Appointment Date**	This field will be populated with the date of the appointment	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Appointment Time**	This field will be populated with the time of the appointment.	Y	Y	Y
CF RE Packet – Page 3 – CF 29	**Comments**	This field will be populated with user entered comments or populated as described in **Section 2.2.2.4c.v.**	Y	Y	Y

b. Business Reply Mail Population

i. The logic to retrieve the BRM address for the 57 Migration Counties will be implemented with **SCR CA-201214.** The population logic for the CF RE packet will use this logic to retrieve the BRM address and then will populate the field on page 2.

c. CF 29 Appointment Population
   i. Find an appointment that meets all the following conditions:
      1. The appointment type is 'Re-Evaluation CW/CF Interview', 'RE Interview, 'Telephone CW/CF RE Interview', or 'Telephonic Interview'.
      2. The status of the appointment is 'Scheduled' or 'Rescheduled'.
      3. The appointment date is greater than the current date.

      Note: If there are multiple appointments that meet the conditions above, it will select the appointment that is scheduled the earliest.

   ii. If there is a telephone interview (appointment type of Telephone CW/CF RE Interview, or Telephonic Interview) and the person has a phone number listed, populate the following fields:
      1. Check the Telephone Interview checkbox.
      2. Populate the Telephone Appointment Date field with the date of the appointment.
      3. Populate the Telephone Appointment Time field with the time of the appointment.
      4. Populate the Telephone Number field with the phone number of the person in the following Phone Number type order:
         a. Home
         b. Cell
         c. Message
         d. Other types not listed above

      For example, if the person has both Home and Cell phone numbers listed, the field will be populated with the Home phone number.

   iii. If there is a telephone interview (appointment type of Telephone CW/CF RE Interview or Telephonic Interview), but the person does not have a phone number listed, populate the following fields:
      1. Check the No Telephone Number checkbox.
      2. Populate the Appointment Date field with the date of the appointment.
      3. Populate the Appointment Time field.

iv. If there is an in-person interview (appointment type of Re-Evaluation CW/CF Interview or RE Interview), populate the following fields:
    1. Check the In-person Interview checkbox.
    2. Populate the In-person Interview Appointment Date field with the date of the appointment.
    3. Populate the In-person Interview Appointment Time field with the time of the appointment.
    4. Populate the office name and address with name and address of the office where the appointment will take place.

v. If there is no appointment, populate the 'Comments' field with the generic text: 'You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview.'

   Spanish Translation: 'Usted recibirá una carta por separado con la fecha y tiempo de la cita de entrevista. Llame a su trabajador(a) inmediatamente si usted no recibe la carta de la cita dentro de 10 días de este aviso. Su carta de la cita le dirá si tiene una entrevista por teléfono o si tiene que venir a la oficina para su entrevista.'

5. The packet will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

   a. The 'Print Local without Save' option is only available when a blank template is generated.
   b. The 'Print and Save' options are only available when generating the packet in the context of the case.

6. The packet will have the following mailing options:

Mailing Options	Option for CF RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name'

Mailing Options	Option for CF RE Packet
	dropdown on the Document Parameters page.
Mailed From (Return)	CalFresh Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	6"x10" Flat Mail Envelope
Return Envelope Type	BRM
Special Paper Stock	N/A

7. The packet will have the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. Create a Customer Reporting entry when the packet is generated and saved with the following information:

Field to Populate	Population for CF RE Packet
Type	CF RE Packet **Note:** This is an existing type in LRS/CalSAWS.
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalFresh Program RE Due Date
Program	CF
Status	Customer Reporting Tracking Status Customer Reporting Statuses: • Generated • Sent • Received • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted For example: The status will be set to "Sent" if the Packet is

	generated and sent to the recipient through Batch.
Status Date	Date of the latest Status Date

9. Create a Journal entry when the packet is generated and saved with the following information:

Field to Populate	Population for CF RE Packet
Case Id	The case associated to the CF RE Packet
Type	Document
Short Description	CF RE Packet
Long Description	The following forms were included for the {redeterDate} RE: CF Coversheet with BRM and NVRA, CF 29, CF 37, EBT 2216, SAR 7A, PUB 13, PUB 275, PUB 388 and VRC. **Note:** The <redeterDate> will be populated with the RE Due Month. If the packet is generated through Template Repository, it will be populated with the date entered in the 'RE Month' field. If the packet is generated through batch, it will be populated with the current RE Due Month of the program.
Created by	Batch or User
Updated by	Batch or User

2.7 CalWORKs Recertification Packet

2.7.1 Overview

This section will describe the migration of the C-IV CW RE packet to LRS/CalSAWS. The packet will only be available to the 57 Migration Counties.

CalWORKs Recertification Packet: CW Coversheet with BRM and NVRA, CSF 105 (09/20), CCP 7 (10/19), SAWS 2A SAR (4/15), CW 2166 (7/19), CW 2184 (8/16), WTW 5 (9/13), CW 101 (6/11), EBT 2216 (3/19), SAR 7A (12/14),

PUB 13 (8/16), PUB 183 (1/04)/ PUB 184 (1/04), PUB 388 (8/17), CW 52 (7/18) and VRC.

Program: CalWORKs

Existing Language: English, Spanish

2.7.2 Description of Change

1. Create a new CalWORKs RE packet coversheet. The coversheet will have the new header described in **Section 2.1** on the first page and the BRM and NVRA on the second page. For the mockup of the CW Coversheet, please refer to **Section 3.0 Supporting Documents #2.**

2. Create the CW RE Packet with the forms in the following order: CW Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5, CW 101, EBT 2216, SAR 7A, PUB 13, PUB 183/PUB 184, PUB 388 and CW 52.
   Note: The VRC is inserted at the Print Center and not part of the source file that will be implemented in the system.

Form	Page Number
Coversheet	1-2
CSF 105	3
CCP 7	4-5
SAWS 2A SAR	6-17
CW 2166	18-20
CW 2184	21-22
WTW 5	23
CW 101	24
EBT 2216	25-26
SAR 7A	27-28
PUB 13	29-30
PUB 183/PUB184	31-32
PUB 388	33-40
CW 52	41-42

3. Add the CW RE Packet to Template Repository for the 57 Migration Counties.
   a. **Form Number:** CW RE Packet

b. **Form Name:** CalWORKs Redetermination Packet
c. **Category:** Application
d. **Program:** CalWORKs
e. Include the following parameters for the packet on the Document Parameters page:
   i. Case Number
   ii. Customer Name
   iii. Program
   iv. RE Month
   v. Language

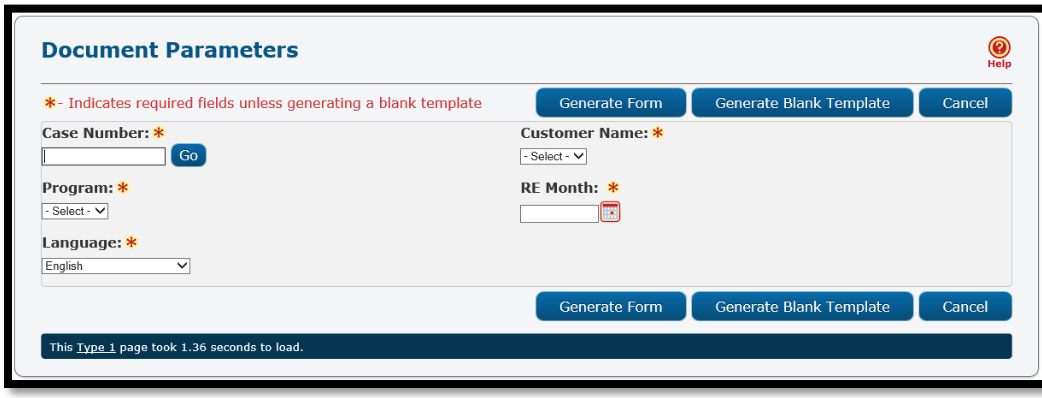


Figure 2.3.2.1 – Document Parameter Page

f. Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a CW RE Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'

4. Add population logic for the CW RE Packet.
   a. The variables will be populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CW RE Packet – Page 1 – Coversheet	**County Name**	This field will be populated with the county name based on the case number.	Y	Y	Y
CW RE Packet –	**Office Address**	This field will be populated with the office	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Coversheet		address of the worker assigned to the program. If the program does not have a worker, it will use the default address based on the county.			
CW RE Packet – Page 1 – Coversheet	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CW RE Packet – Page 1 – Coversheet	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y
CW RE Packet – Page 1 – Coversheet	**Case Number**	This field will be populated with the case number of the current case.	Y	Y	Y
CW RE Packet – Page 1 – Coversheet	**Worker Name**	This field will be populated with the name of the worker assigned to the program. If the program does not have a worker, it populate with 'Customer Rep'.	Y	Y	Y
CW RE Packet –	**Worker ID**	This field will be populated with	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Coversheet		the Id of the worker assigned to the program.			
CW RE Packet – Page 1 – Coversheet	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. If the program does not have a worker, it will use the default phone number based on the county. The phone number will have the following format: (###) ###-####	Y	Y	Y
CW RE Packet – Page 1 – Coversheet	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CW RE Packet – Page 1 – Coversheet	**Recipient Mailing Address**	This field will be populated with the mailing address of the primary applicant when generated through batch or the person select in the Customer Name dropdown on the documents parameter page when generating	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		from Template Repository.			
CW RE Packet – Page 2 – Coversheet	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Customer Appointment Name**	This field will be populated with the name of the customer who has the appointment. This is the field in the first sentence after the 'Dear'.	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Attendees**	This field will be populated with the list of attendees.	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Customer Appointment Date**	This field will be populated with the date of the appointment.	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Customer Appointment Start Time**	This field will be populated with the start time of the appointment.	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Staff Appointment Name**	This field will be populated with the name of the worker who the customer has the appointment with.	Y	Y	Y
CW RE Packet –	**Customer Appointment Location**	This field will be populated with the office	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 3 – CSF 105		address where the customer has the appointment.			
CW RE Packet – Page 3 – CSF 105	**Duration**	This field will be populated with the length of the appointment.	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Appointment Type**	This field will be populated with the appointment type.	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Text Field Below Appointment Type**	For population detail, please refer to **Section 2.3.2.4c.iv.**	Y	Y	Y
CW RE Packet – Page 3 – CSF 105	**Comments**	This field will be populated with user entered comments or populated as described in **Section 2.2.2.4c.iii.**	Y	Y	Y

b. Business Reply Mail Population
    i. The logic to retrieve the BRM address for the 57 Migration Counties will be implemented with **SCR CA-201214.** The population logic for the CW RE packet will use this logic to retrieve the BRM address and then will populate the field on page 2.

c. CSF 105 Appointment Population
    i. Find an appointment that meets all the following conditions:
        1. The appointment type is 'Re-Evaluation CW/CF Interview', 'RE Interview', 'Telephone CW/CF RE Interview', or 'Telephonic Interview'.
        2. The status of the appointment is 'Scheduled' or 'Rescheduled'.

3. The appointment date is greater than the current date.

Note: If there are multiple appointments that meet the conditions above, it will select the appointment that is scheduled the earliest.

ii. If there is an appointment, use the CSF 105 population logic to populate the form in the packet.

iii. If there is no appointment, use the CSF 105 population logic that populates the 'Customer Appointment Name' field with the name of the person who has the appointment and the 'Comments' field with the generic text: 'You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview.'

iv. If the county has lobby management, the text box below the 'Appointment Type' field is populated with the following text: 'If your appointment is in a County office, please bring this letter with you to your appointment to help with the check in process.'
Spanish Translation: 'Si su cita es en una oficina del Condado, por favor traiga esta carta con usted a su cita para ayudar con el proceso de registración.'
Technical Note: The 'WBR Enabled' column in Code Table 15 will indicate if a county has lobby management.

5. The packet will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

a. The 'Print Local without Save' option is only available when a blank template is generated.
b. The 'Print and Save' options are only available when generating the packet in the context of the case.

6. The packet will have the following mailing options:

Mailing Options	Option for CW RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalWORKs Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name'

	dropdown on the Document Parameters page.
Mailed From (Return)	CalWORKs Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	6"x10" Flat Mail Envelope
Return Envelope Type	BRM
Special Paper Stock	N/A

7. The packet will have the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. Create a Customer Reporting entry when the packet is generated and saved with the following information:

Field to Populate	Population for CF RE Packet
Type	CW RE Packet **Note:** This is an existing type in LRS/CalSAWS.
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalWORKs Program RE Due Date
Program	CW
Status	Customer Reporting Tracking Status Customer Reporting Statuses: • Generated • Sent • Received • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted For example: The status will be set to "Sent" if the Packet is generated and sent to the recipient through Batch.

Field to Populate	Population for CF RE Packet
Status Date	Date of the latest Status Date

9. Create a Journal entry when the packet is generated and saved with the following information:

Field to Populate	Population for CF RE Packet
Case Id	The case associated to the CW RE Packet
Type	Document
Short Description	CW RE Packet
Long Description	The following forms were included for the {redeterDate} RE: CW Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5, CW 101, EBT 2216, SAR 7A, PUB 13, PUB 183/PUB 184, PUB 388, CW 52 and VRC. **Note:** The <redeterDate> will be populated with the RE Due Month. If the packet is generated through Template Repository, it will be populated with the date entered in the 'RE Month' field. If the packet is generated through batch, it will be populated with the current RE Due Month of the program.
Created by	Batch or User
Updated by	Batch or User

2.8 CalWORKs/CalFresh Recertification Packet

2.8.1 Overview

This section will describe the migration of the C-IV CW/CF RE packet to LRS/CalSAWS. The packet will only be available to the 57 Migration Counties.

CalWORKs/CalFresh Recertification Packet: CW/CF Coversheet with BRM and NVRA, CSF 105 (09/20), CCP 7 (10/19), SAWS 2A SAR (4/15), CW 2166 (7/19), CW 2184 (8/16), WTW 5 (9/13), CW 101 (6/11), EBT 2216 (3/19), SAR 7A (12/14), PUB 13 (8/16), PUB 275 (4/07), PUB 183 (1/04)/PUB 184 (1/04), PUB 388 (8/17), CW 52 (7/18).

Program: CalWORKs, CalFresh

Existing Language: English, Spanish

2.8.2 Description of Change

1. Create a new CalWORKs/CalFresh RE packet coversheet. The coversheet will have the new header described in **Section 2.1** on the first page and the BRM and NVRA on the second page. For the mockup of the CW/CF Coversheet, please refer to **Section 3.0 Supporting Documents #3.**

2. Create the CW/CF RE Packet with the forms in the following order: CW/CF Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5, CW 101, EBT 2216, SAR 7A, PUB 13, PUB 275, PUB 183, PUB 388 and CW 52.
   Note: The VRC is inserted at the Print Center and not part of the source file that will be implemented in the system.

Form	Page Number
Coversheet	1-2
CSF 105	3
CCP 7	4-5
SAWS 2A SAR	6-17
CW 2166	18-20
CW 2184	21-22
WTW 5	23
CW 101	24
EBT 2216	25-26
SAR 7A	27-28
PUB 13	29-30
PUB 275	31-32
PUB 183	33-34
PUB 388	35-42

Form	Page Number
CW 52	43-44

3. Add the CW/CF RE Packet to Template Repository for the 57 Migration Counties.
    a. **Form Number:** CW/CF RE Packet
    b. **Form Name:** CalWORKs/CalFresh RE Packet
    c. **Category:** Application
    d. **Program:** CalWORKs, CalFresh
    e. Include the following parameters for the packet on the Document Parameters page:
        i. Case Number
        ii. Customer Name
        iii. Program
        iv. RE Month
        v. Language

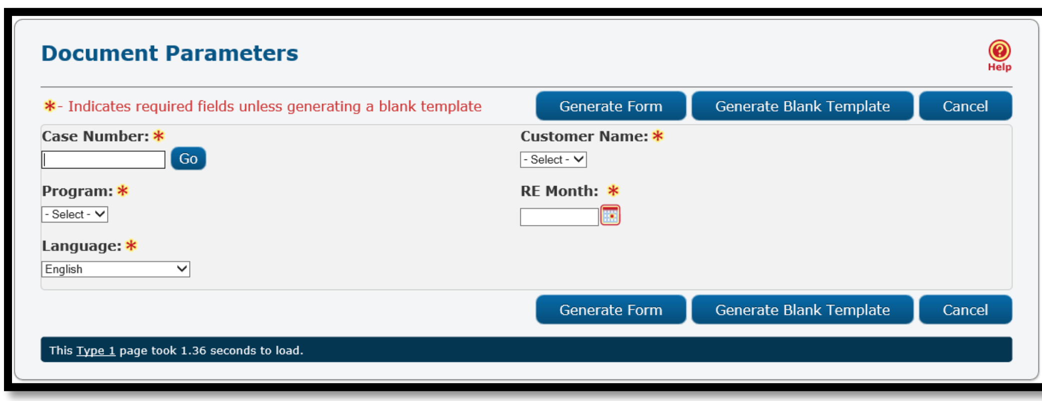


Figure 2.4.2.1 – Document Parameter Page

    f. Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a CW/CF RE Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'

4. Add population logic for the CW/CF RE Packet.
    a. The variables will be populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CW/CF RE Packet –	**County Name**	This field will be populated with	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Coversheet		the county name based on the case number.			
CW/CF RE Packet – Page 1 – Coversheet	**Office Address**	This field will be populated with the office address of the worker assigned to the program. If the program does not have a worker, it will use the default address based on the county.	Y	Y	Y
CW/CF RE Packet – Page 1 – Coversheet	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CW/CF RE Packet – Page 1 – Coversheet	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y
CW/CF RE Packet – Page 1 – Coversheet	**Case Number**	This field will be populated with the case number of the current case.	Y	Y	Y
CW/CF RE Packet – Page 1 – Coversheet	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		If the program does not have a worker, it populate with 'Customer Rep'.			
CW/CF RE Packet – Page 1 – Coversheet	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y	Y
CW/CF RE Packet – Page 1 – Coversheet	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. If the program does not have a worker, it will use the default phone number based on the county. The phone number will have the following format: (###) ###-####	Y	Y	Y
CW/CF RE Packet – Page 1 – Coversheet	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CW/CF RE Packet – Page 1 – Coversheet	**Recipient Mailing Address**	This field will be populated with the mailing address of the primary applicant when generated	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		through batch or the person select in the Customer Name dropdown on the documents parameter page when generating from Template Repository.			
CW/CF RE Packet – Page 2 – Coversheet	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Customer Appointment Name**	This field will be populated with the name of the customer who has the appointment. This is the field in the first sentence after the 'Dear'.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Attendees**	This field will be populated with the list of attendees.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Customer Appointment Date**	This field will be populated with the date of the appointment.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Customer Appointment Start Time**	This field will be populated with the start time of the appointment.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CW/CF RE Packet – Page 3 – CSF 105	**Staff Appointment Name**	This field will be populated with the name of the worker who the customer has the appointment with.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Customer Appointment Location**	This field will be populated with the office address where the customer has the appointment.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Duration**	This field will be populated with the length of the appointment.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Appointment Type**	This field will be populated with the appointment type.	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Text Field Below Appointment Type**	For population detail, please refer to **Section 2.4.2.4c.iv.**	Y	Y	Y
CW/CF RE Packet – Page 3 – CSF 105	**Comments**	This field will be populated with user entered comments or populated as described in **Section 2.2.2.4c.iii.**	Y	Y	Y

b. Business Reply Mail Population
   i. The logic to retrieve the BRM address for the 57 Migration Counties will be implemented with **SCR CA-201214.** The

population logic for the CW/CF RE packet will use this logic to retrieve the BRM address and then will populate the field on page 2.

a. CSF 105 Appointment Population
    i. Find an appointment that meets all the following conditions:
        1. The appointment type is 'Re-Evaluation CW/CF Interview' or 'Telephone CW/CF RE Interview'.
        2. The status of the appointment is 'Scheduled' or 'Rescheduled'.
        3. The appointment date is greater than the current date.

       Note: If there are multiple appointments that meet the conditions above, it will select the appointment that is scheduled the earliest.
    ii. If there is an appointment, use the CSF 105 population logic to populate the form in the packet.
    iii. If there is no appointment, use the CSF 105 population logic that populates the 'Customer Appointment Name' field with the name of the person who has the appointment and the 'Comments' field with the generic text: 'You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview.'
    iv. If the county has lobby management, the text box below the 'Appointment Type' field is populated with the following text: 'If your appointment is in a County office, please bring this letter with you to your appointment to help with the check in process.'
       Technical Note: The 'WBR Enabled' column in Code Table 15 will indicate if a county has lobby management.

5. The packet will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

    a. The 'Print Local without Save' option is only available when a blank template is generated.
    b. The 'Print and Save' options are only available when generating the packet in the context of the case.

6. The packet will have the following mailing options:

Mailing Options	Option for CW/CF RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalWORKs Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalWORKs Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	6"x10" Flat Mail Envelope
Return Envelope Type	BRM
Special Paper Stock	N/A

7. The packet will have the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. Create a Customer Reporting entry when the packet is generated and saved with the following information:

Field to Populate	Population for CW/CF RE Packet
Type	CW/CF RE Packet **Note:** This is an existing type in LRS/CalSAWS.
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalWORKs Program RE Due Date
Program	CW and CF
Status	Customer Reporting Tracking Status Customer Reporting Statuses: • Generated • Sent • Received • Incomplete • Not Applicable

	• Reviewed – Ready to Run EDBC • Compete – EDBC Accepted For example: The status will be set to "Sent" if the Packet is generated and sent to the recipient through Batch.
Status Date	Date of the latest Status Date

9. Create a Journal entry when the packet is generated and saved with the following information:

Field to Populate	Population for CW/CF RE Packet
Case Id	The case associated to the CW/CF RE Packet
Type	Document
Short Description	CW/CF RE Packet
Long Description	The following forms were included for the {redeterDate} RE: CW/CF Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5,CW 101, EBT 2216, SAR 7A, PUB 13, PUB 275, PUB 183/PUB 184, PUB 388, CW 52 and VRC **Note:** The <redeterDate> will be populated with the RE Due Month. If the packet is generated through Template Repository, it will be populated with the date entered in the 'RE Month' field. If the packet is generated through batch, it will be populated with the current RE Due Month of the program.
Created by	Batch or User
Updated by	Batch or User

2.9 Migrate the C-IV CalFresh RE Packet Batch Job

2.9.1 Overview

The C-IV CF RE Packet batch job (PB00R511) will find cases with a CF program that has the RE due in the following month. For example, if the batch job runs on 07/15/2020, it will pick up cases where RE Due Month of the CF program is 08/2020. The CF RE packet will be generated and sent out for each of the cases.

2.9.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month reference below is the month following the batch date.
   a. The program is CalFresh.
   b. The program is Active.
   c. The program RE due month is the same month as the effective month and the completion date is not set.
   d. There does not exist an active CW program on the same case with the same RE due month and the completion date is not set.
   e. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code of 'CFR' and for the same effective month.
   f. There does not exist a generated CF RE packet for the same effective month.

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

Field to Populate	Population for CF RE Packet
Case Id	The Id of the case associated to the CF program.
Program Id	The Id of the active CF program.
Person Id	The primary applicant of the CF program.
Type Code	FR
Sub Type Code	CFR
Effective Date	The begin date of the current RE Due Month of the CF program.

2.9.3 Execution Frequency

The batch job will run monthly. The exact day of the month the job will run will be determined once a new Central Print vendor is selected.

2.9.4 Key Scheduling Dependencies

The PB00R600 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R550 - PB00R599 form generation thread jobs will run after the balancer and is responsible for generating the packets.

2.9.5 Counties Impacted

The job will run only for the 57 Migration Counties.

2.9.6 Data Volume/Performance

Approximately 24,000 records are processed monthly in C-IV. Please note that this is an approximation and this number may vary. The number of records will increase with the inclusion of CalWIN; however, the number is currently unknown.

2.9.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.10 Migrate the C-IV CalWORKs RE Packet Batch Job

2.10.1 Overview

The C-IV CW RE Packet batch job (PB00R512) will find cases with a CW program that has the RE due in the following month. For example, if the batch job runs on 07/15/2020, it will pick up cases where RE Due Month of the CW program is 08/2020.The CW RE packet will be generated and sent out for each of the cases.

2.10.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month reference below is the month following the batch date.
    a. The program is CalWORKs.
    b. The program is Active.
    c. The program RE due month is the same month as the effective month and the completion date is not set.
    d. There does not exist an active CF program on the same case with the same RE due month and the completion date is not set.

e. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code of 'CWR' and for the same effective month.
f. There does not exist a generated CW RE packet for the same effective month.

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

Field to Populate	Population for CW RE Packet
Case Id	The Id of the case associated to the CW program.
Program Id	The Id of the active CW program.
Person Id	The primary applicant of the CW program.
Type Code	FR
Sub Type Code	CWR
Effective Date	The begin date of the current RE Due Month of the CW program.

2.10.1 Execution Frequency

The batch job will run monthly. The exact day of the month the job will run will be determined once a new Central Print vendor is selected.

2.10.2 Key Scheduling Dependencies

The PB00R600 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R550 - PB00R599 form generation thread jobs will run after the balancer and is responsible for generating the packets.

2.10.3 Counties Impacted

The job will run only for the 57 Migration Counties.

2.10.4 Data Volume/Performance

Approximately 1,500 records are processed monthly in C-IV. Please note that this is an approximation and this number may vary. The number of records will increase with the inclusion of CalWIN; however, the number is currently unknown.

2.10.5 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.11 Migrate the C-IV CalWORKs/CalFresh RE Packet Batch Job

2.11.1 Overview

The C-IV CW/CF RE Packet batch job (PB00R510) will find cases with a CW and CF program with the same RE due date and the RE due in the following month. For example, if the batch job runs on 07/15/2020, it will pick up cases where RE Due Month of the CW and CF programs is 08/2020.The CW/CF RE packet will be generated and sent out for each of the cases.

2.11.2 Description of Change

1. Create a new batch job that will find cases that meets all the following conditions. The effective month reference below is the month following the batch date.
    a. The program is CalWORKs.
    b. The program is Active.
    c. The program RE due month is the same month as the effective month and the completion date is not set.
    d. There exists an active CF program on the same case with the same RE due month as the CW program and the completion date is not set.
    e. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code of 'CWF' and for the same effective month.
    f. There does not exist a generated CW/CF RE packet for the same effective month.

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

Field to Populate	Population for CW/CF RE Packet
Case Id	The Id of the case associated to the CW program.
Program Id	The Id of the active CW program.
Person Id	The primary applicant of the CW program.
Type Code	FR
Sub Type Code	CWF

Field to Populate	Population for CW/CF RE Packet
Effective Date	The begin date of the current RE Due Month of the CW program.

2.11.3 Execution Frequency

The batch job will run monthly. The exact day of the month the job will run will be determined once a new Central Print vendor is selected.

2.11.4 Key Scheduling Dependencies

The PB00R600 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R550 - PB00R599 form generation thread jobs will run after the balancer and is responsible for generating the packets.

2.11.5 Counties Impacted

The job will run only for the 57 Migration Counties.

2.11.6 Data Volume/Performance

Approximately 7,600 records are processed monthly in C-IV. Please note that this is an approximation and this number may vary. The number of records will increase with the inclusion of CalWIN; however, the number is currently unknown.

2.11.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CalFresh Coversheet Mockup	CF_COVERSHEET_EN.pdf CF_COVERSHEET_SP.pdf
2	Client Correspondence	CalWORKs Coversheet Mockup	CW_COVERSHEET_EN.pdf CW_COVERSHEET_SP.pdf
3	Client Correspondence	CalWORKs/CalFresh Coversheet Mockup	CW_CF_COVERSHEET_EN.pdf CW_CF_COVERSHEET_SP.pdf
4	Client Correspondence	CF 29 Mockup	CF29_EN.pdf CF29_SP.pdf
5	Client Correspondence	CSF 105 Mockup	CSF105_END.pdf CSF105_SP.pdf
6	Client Correspondence	PUB 275 Mockup	PUB275_SP.pdf
7	Client Correspondence	CCP 7 Mockup	CCP7_SP.pdf
8	Client Correspondence	PUB 13 Mockup	PUB13_EN.pdf PUB13_SP.pdf PUB13_AE.pdf PUB13_AR.pdf PUB13_CA.pdf PUB13_CH.pdf PUB13_FA.pdf PUB13_KO.pdf PUB13_RU.pdf PUB13_TG.pdf PUB13_VI.pdf
9	Client Correspondence	CW 2184 Mockup	CW2184_EN.pdf CW2184_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1039	**Original:** The CONTRACTOR shall consolidate the CalSAWS printing processes to support the utilization of only one set of common print files and print streams. The print services vendor must have the ability to accept county specific stuffers/mailers/added pages, to be included/stuffed in county mail upon request. The CONTRACTOR shall consolidate the Los Angeles and 39 C-IV Migration Counties processes for the address placement of flat mail (RE Packets) to support the utilization of only one print vendor. The CONTRACTOR shall account for the time required to compare the RE Packet Batch Job Logic to determine if the population of individuals being identified to receive the RE packets is the same. The following 13 C-IV RE Packets and generation process will be migrated into the CalSAWS Software for the 39 C-IV Migration Counties: 1) CW/CF RE Packet – CalWORKs / CalFresh RE Packet	**Original:** - Adding the forms is covered with DDID 1043. - Consolidating print processes is covered with DDID 1476. - All envelope changes will be covered by M&O. - CalWIN will use the existing LRS/C-IV RE packet types, logic and processes. Existing packets will not be modified or new packets created for CalWIN counties. - Existing enclosure functionality will be updated to allow enclosures to be added to more types of forms. - Enclosure functionality will be updated to allow for enclosures to be uploaded/attached by language. - Enclosure functionality will be updated to allow for multiple enclosures to be added a form type.	The C-IV CF RE, CW RE, and CW/CF RE packets are migrated over to LRS/CalSAWS for the 57 Migration counties.

	2) CW RE Packet – CalWORKs Redetermination Packet 3) CF RE Packet – CalFresh Recertification Packet 4) MC RE Packet – Regular Medi-Cal Redetermination Packet 5) LTC MC RE Packet – Long Term Care (LTC) Medi-Cal Redetermination Packet 6) ABD MC RE Packet – Aged, Blind, Disabled (ABD) Medi-Cal Redetermination Packet 7) MAGI RE Packet – Modified Adjusted Gross Income (MAGI) RE Packet 8) Mixed MC RE Packet – MAGI and Non-MAGI Redetermination Packet 9) Non-MAGI Packet – Non-MAGI Screening Packet 10) LTC Mixed RE Packet – Long Term Care (LTC) Mixed Household RE Packet 11) LTC RE Packet – Long Term Care (LTC) RE Packet 12) Non-MAGI LTC Mixed Household RE Packet – Non-Modified Adjusted Gross Income (MAGI) Long Term Care (LTC) Mixed Household RE Packet 13) MC RE/ABD RE Packet – Medi-Cal RE / Aged, Bild, Disabled (ABD) RE Packet **Revised:** The CONTRACTOR shall consolidate the CalSAWS printing processes to support the utilization of only one set of common print files and print streams for 57 Migration	- Enclosure approval process will remain in place. - Enclosure estimation logic will need to be updated for the new form types and by language type. - Counties will be able to add forms specific to their county via the enclosure process. Batch properties will have to be updated for each wave. **Revised:** - Adding the forms required for the RE packets is covered with other migration DDIDs. - Consolidating print processes is covered with DDID 1476. - All envelope changes will be covered by M&O. - CalWIN will use the existing C-IV RE packet types, logic and processes. Existing packets will not be modified or new packets created for CalWIN counties. - Existing enclosure functionality will be updated to allow enclosures to be	

	Counties. Los Angeles County will continue their process of using a coversheet and pre-stuffed packets. The print services vendor must have the ability to accept county specific stuffers/mailers/added pages, to be included/stuffed in county mail upon request. The CONTRACTOR shall consolidate the 57 Migration Counties processes for the address placement of flat mail (RE Packets) to support the utilization of only one print vendor. Los Angeles County will continue to use the existing process as mentioned above. The following 3 C-IV RE Packets and generation process will be migrated into the CalSAWS Software for the 57 Migration Counties: 1) CW/CF RE Packet – CalWORKs / CalFresh RE Packet 2) CW RE Packet – CalWORKs Redetermination Packet 3) CF RE Packet – CalFresh Recertification Packet	added to more types of forms. - Enclosure functionality will be updated to allow for enclosures to be uploaded/attached by language. - Enclosure functionality will be updated to allow for multiple enclosures to be added a form type. - Enclosure approval process will remain in place. - Enclosure estimation logic will need to be updated for the new form types and by language type. - Counties will be able to add forms specific to their county via the enclosure process. Batch properties will have to be updated for each wave.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207405 | DDID 1024, DDID 1025

Migrate the Device Management pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/26/2020	1.0	Original Document	Melissa Mendoza
07/15/2020	1.1	Updated per QA Comments	Melissa Mendoza
07/24/2020	1.2	Updated per Deliverable Comments	Melissa Mendoza
07/27/2020	1.3	Updated Design section 2.2.3.1 per CalSAWS DEL 37 Comments Log	Jasmine Chen

Table of Contents

1 OVERVIEW

1.1 Current Design

In the C-IV System there are Device Management administrative pages that are required to support the Kiosk and Facilitated Access Control Tablet (FACT) Lobby solutions. The Device Management pages need to be migrated from C-IV to the LRS/CalSAWS to support DDID 1778, which will migrate the C-IV lobby solution to the LRS/CalSAWS.

1.2 Requests

Per DDID 1024, migrate the Device Assignment Detail page.

Per DDID 1025, migrate the Device Flow Mgmt. task navigation, Flow Management List, Flow Management Detail and related child pages.

1.3 Overview of Recommendations

1. Migrate the Device Assignment Detail page to the LRS/CalSAWS.
2. Migrate the Flow Management List and Flow Management Detail pages to the LRS/CalSAWS.

1.4 Assumptions

1. Setting up and ordering the Kiosk or FACT must be done with the Lobby Management team before a County can use the Administrative pages to manage their devices.
2. The Task for document upload from the FACT or Kiosk will be handled with DDID 1628.

2 RECOMMENDATIONS

Migrate the Device Assignment Detail page into the LRS/CalSAWS. These administrative pages are necessary for modifying the Kiosk and FACT, which includes Wireless Barcode Reader (WBR) mode, for the C-IV counties that are currently using the devices, and for future counties to manage the Kiosk or FACT devices. Customers can use the Kiosk to check in for appointments or be directed to a specific window as defined with the Flow Management pages. Each time a customer uses the Kiosk, the Reception Log will be updated with the information the customer selected on the Kiosk. In addition, the FACT allows a worker to check in customers for appointments using their appointment letters using the tablet camera in Wireless Barcode Reader (WBR) mode, change the Kiosk flows that are in a lobby, and also act as a Kiosk from the tablet.

2.1 Device Assignment Detail

2.1.1 Overview

Migrate the Device Assignment Detail page to the LRS/CalSAWS to support the existing Kiosk and FACT tablets. The Device Assignment Detail page will be used to set up the Kiosks and FACTs in the county. The page will default to list all the devices that do not have an office assigned.

2.1.2 Device Assignment Detail Mockup

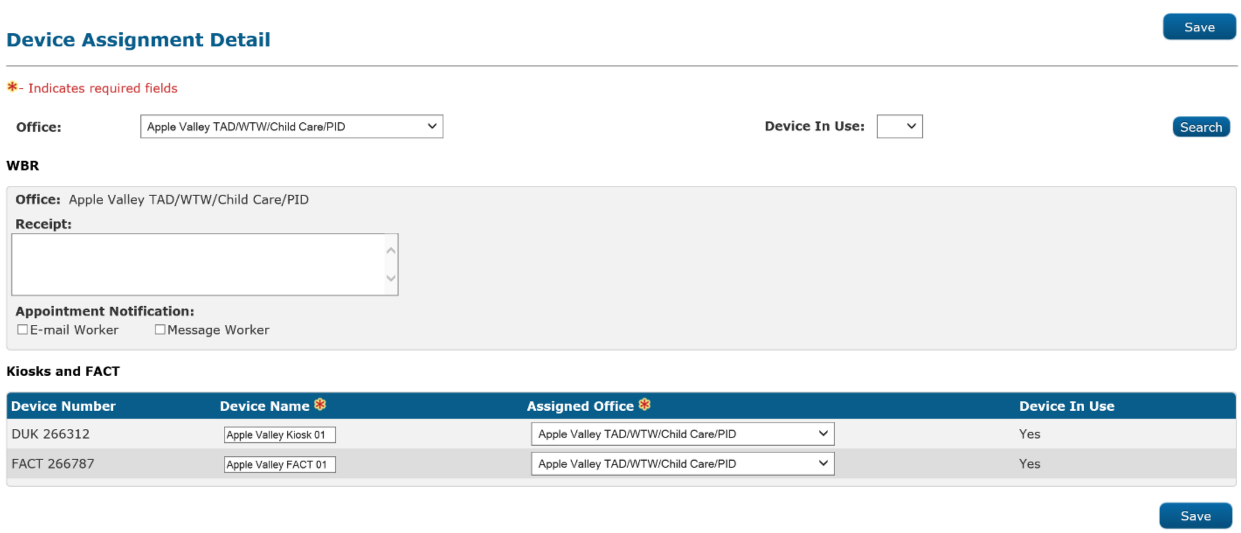


Figure 2.1.1a Device Assignment Detail Mockup – with WBR

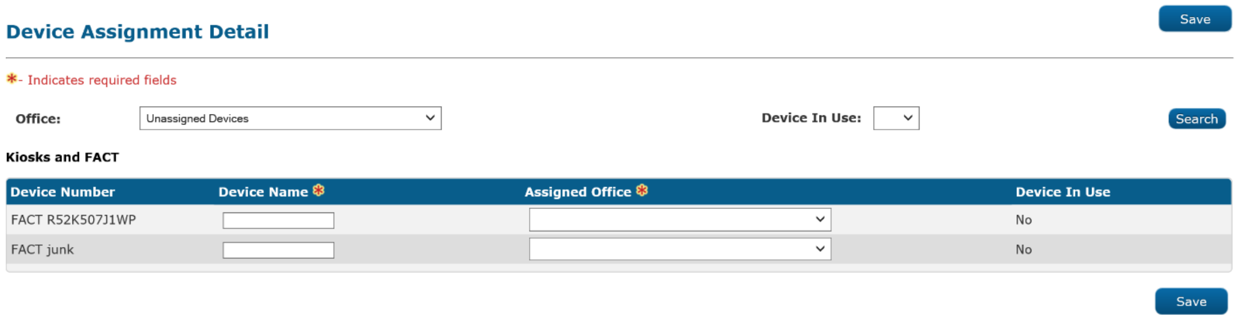


Figure 2.1.1b Device Assignment Detail Mockup – Without WBR

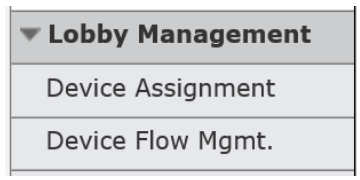


Figure 2.1.1c Lobby Management Task Navigation

2.1.3 Description of Changes

1. The Device Assignment task navigation will open the Device Assignment Detail page in a standard and sizable pop-up window. The Task Navigation will include a new dropdown section called Lobby Management which will only appear if the User has security access to one or more of the Task navigation elements that appear under it.
2. The page will default to list all the devices that do not have an office assigned. The user can also access other offices in the county.
3. The user will be able to define a device name and select the office in which the device is located.
4. The user can include WBR information on the Device Assignment Detail page. The WBR information will be used on the FACT when using WBR Mode. Also, the user can send notifications via e-mail or Message Center to the worker. This is done at an office level instead of at the county level. E-mail/Message notifications will be sent only if an appointment letter is scanned. The WBR section displays for each individual office and not for a selection of 'All' or 'Unassigned Devices' under the 'Office' dropdown on Device Assignment Detail.
    a. When using the FACT WBR Mode to mark documents as Received or to check in Customers via the Appointment Letter, the Reception Log entry will be created with the information of the logged in Worker.

Page Fields:

- Office – Defaults to Unassigned Devices. Options include: All, Unassigned Devices, <list of all county offices>
- Device In Use dropdown – Allows user to filter the list by only the devices that are currently assigned a flow or are not assigned a flow. Options include: <blank>, Yes, No.
- Device Number – Value will be determined based on hardware when a new device is purchased and added to the list
- Device Name –Name assigned by the county to identify the device. Character limit of 100.
- Assigned Office – List of county offices.
- Device In Use – Indicates whether a device is currently assigned a flow.
- Receipt – Allows user to define text that should be printed at the end of the receipt. Users can enter a maximum of 100 characters. WBR Section Only.
    - A validation message will be: "Receipt is too long [Max. length: 100 Characters]."
- E-mail Worker – User can send e-mail notifications to the Workers attached to the appointment, only if an appointment letter is scanned. WBR Section Only.
- Message Worker – User can send Message Center notifications to workers only if an appointment letter is scanned. WBR Section Only.
- Device Number – Device number is a combination of the Serial Number and Device type the user has selected for the flow.
- Office – Office to which Receipt information is associated. WBR Section Only.
- Both Device Name and Office are required for the same row, however not all rows are required when saving the page.
    - A validation message will display when only the Device Name is entered or only the Assigned Office is selected. The message will be: "Device Name OR Assigned Office – Both Device Name and Assigned Office are required."

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Assignment**

2.1.5 Security Updates

The following Security Rights and Groups exist in LRS/CalSAWS and should be used:

- Kiosk Assignment

- Kiosk Flow Management
- Kiosk Flow Override
- Remote Kiosk Configuration

2.1.6 Page Mapping

PMCR for new page.

2.1.7 Page Usage/Data Volume Impacts

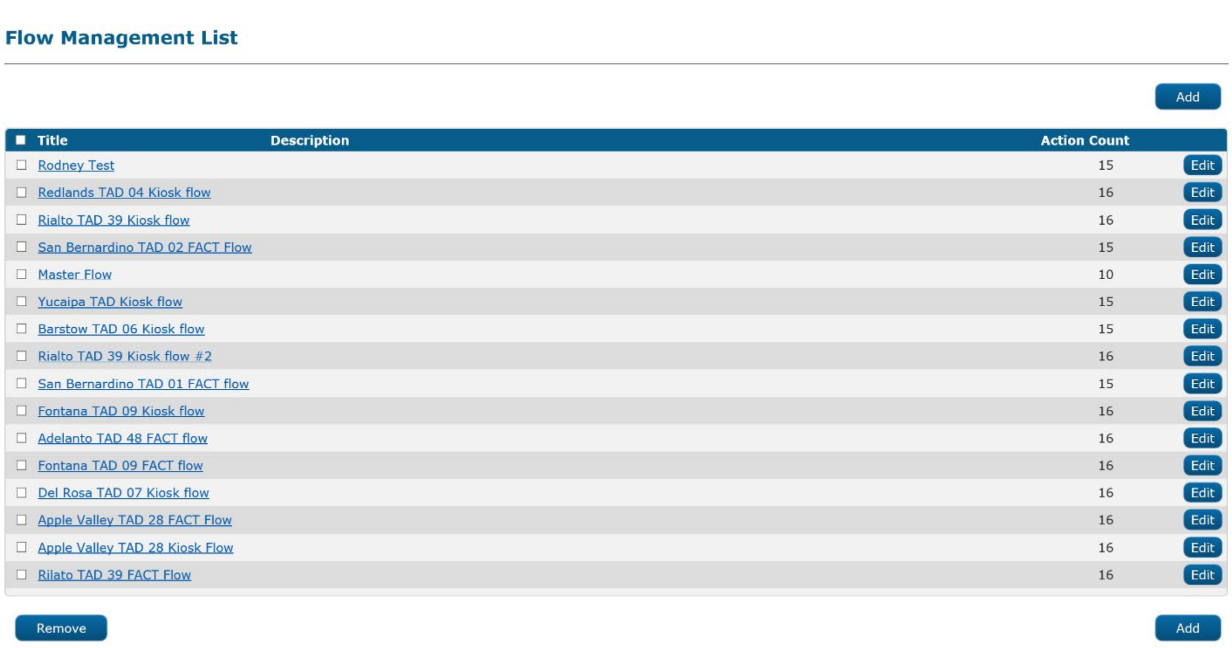
N/A

2.2 Flow Management List

2.2.1 Overview

Migrate the Flow Management List page. The Flow Management List page will be used to create new and access existing device flows for the county.

2.2.2 Flow Management List Mockup


Flow Management List

Add

Title	Description	Action Count	
Rodney Test		15	Edit
Redlands TAD 04 Kiosk flow		16	Edit
Rialto TAD 39 Kiosk flow		16	Edit
San Bernardino TAD 02 FACT Flow		15	Edit
Master Flow		10	Edit
Yucaipa TAD Kiosk flow		15	Edit
Barstow TAD 06 Kiosk flow		15	Edit
Rialto TAD 39 Kiosk flow #2		16	Edit
San Bernardino TAD 01 FACT flow		15	Edit
Fontana TAD 09 Kiosk flow		16	Edit
Adelanto TAD 48 FACT flow		16	Edit
Fontana TAD 09 FACT flow		16	Edit
Del Rosa TAD 07 Kiosk flow		16	Edit
Apple Valley TAD 28 FACT Flow		16	Edit
Apple Valley TAD 28 Kiosk Flow		16	Edit
Rilato TAD 39 FACT Flow		16	Edit

Remove Add

Figure 2.2.1 Flow Management List Mockup

2.2.3 Description of Change

1. Add the Flow Management List page. It will be accessed from the Global Navigation of Tools, Local Navigation of Office Admin and Lobby Management Task Navigation section - Device Flow Mgmt. and will open in a new sizable pop-up window.

Page Fields:

- Title – Populated from the Flow Management Detail page. Clicking the hyperlink accesses the detail page in view mode.
- Description – Populated from the Flow Management Detail page.
- Action Count – The total number of actions in the flow. The count will include all actions of type Custom, Appointment, and Document Upload.
- Edit button – Access the Flow Management Detail page in Edit Mode.
- Remove button - Removes the record.
- Add button – Adds a new record to access the Flow Management Detail page in Create Mode.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.2.5 Security Updates

The following Security Rights and Groups exist in LRS/CalSAWS and should be used:

- Kiosk Assignment
- Kiosk Flow Management
- Kiosk Flow Override
- Remote Kiosk Configuration

2.2.6 Page Mapping

PMCR for new page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Flow Management Detail

2.3.1 Overview

The Flow Management Detail page will be used to set up the device flow. The user will be able to define a name and description of the flow, select the devices which will use this flow, and add actions to the flow.

2.3.2 Flow Management Detail Mockup

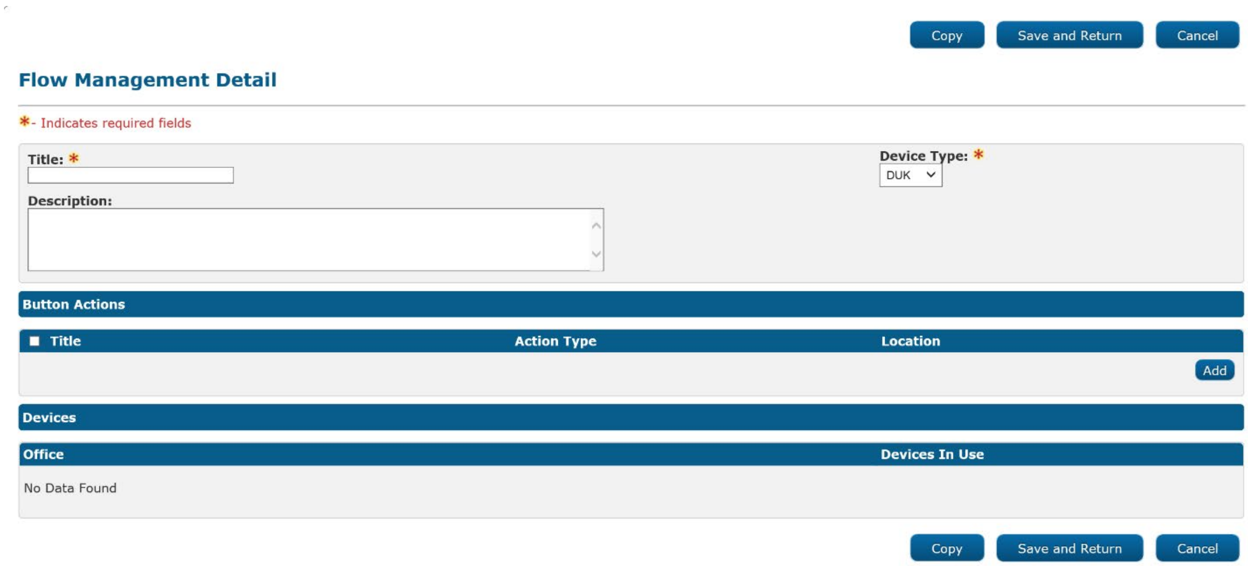


Figure 2.3.1a Flow Management Detail Mockup- Create Mode

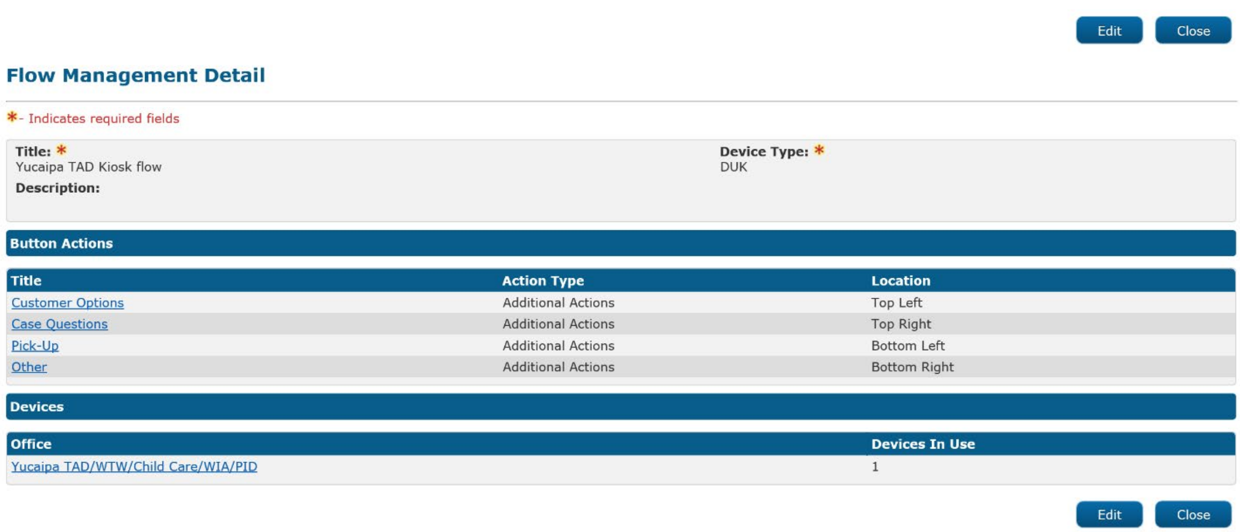


Figure 2.3.1b Flow Management Detail Mockup- View Mode

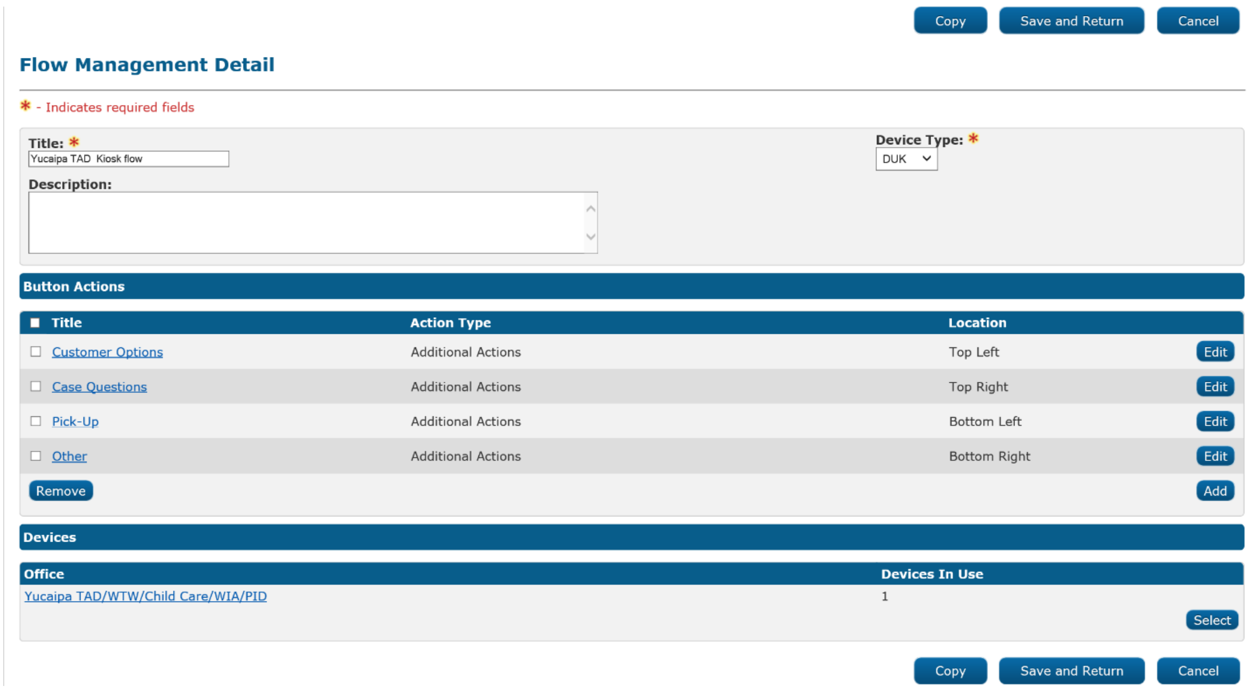


Figure 2.3.1c Flow Management Detail Mockup- Edit Mode

2.3.3 Description of Change

1. The Flow Management Detail page will be accessed by adding a new record from the Flow Management List page.
2. The user can either choose regular Document Upload Kiosk (DUK) or FACT. A user can now select device type for a flow on Flow Management Detail page. The available types are DUK and FACT.

Page Fields:

- Title – Name used for county to identify the flow. Character limit of 100.
- Device Type – This allows the user to define the type of device to be used for the flow. The available types are DUK and FACT. DUK is the default value. This is a required field.
    - o If a Device Type of FACT is selected, the action type of Document Upload will not be an option on the Action Detail page.
    - o Note: C-DUK exists in C-IV but is not a valid option and should be removed.
- Description – Character limit of 1000.
- Button Actions – Hyperlinks and buttons navigate to Action Detail page.

- Button Actions: Add button – Once four actions have been created for the flow, a validation message will display if the user tries to add an additional action.
  - "Edit - Maximum number of actions is 4. Please edit an existing action."
- Button Actions: Location – The same location cannot be used on more than one action. A validation message will display if the user tries to save with multiple actions using the same location.
  - "Edit – More than one action is in the same location. Please edit the location of an action."
- Devices: Select button – Navigates to Select Device for logged in user's office in edit mode.
- Save and Return button – If a flow has devices selected in multiple offices and the user made changes to the Button Actions, a validation message will display preventing the user from saving the changes. "Copy - This flow is being used in multiple offices. Please copy the flow to make changes."
- If the user has the override security group, the copy validation message will not display.
- If a Device Type of FACT is selected and if any button actions have an action type of Document Upload, a validation message will display as follows: "A flow of Device Type 'FACT' cannot contain a Button Action with an Action Type from 'Document Upload'."
- Copy button – The button actions on the page will be copied to a new Flow Management Detail page in create mode. The Title, Description, and Devices will not be copied and must be redefined. No changes on the previous Flow Management Detail page will be saved.
- Security Rights:
  - Kiosk Flow Override - allows user to save flow changes if the flow is used by kiosks in multiple offices.
- Remote Kiosk Configuration - allows user to use the FACT to configure the Kiosk flow.

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.3.5 Security Updates

N/A - Security rights are listed above.

2.3.6 Page Mapping

PMCR for new page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Action Detail

2.4.1 Overview

The Action Detail page will be used to define what action will happen when the customer selects a button on the Kiosk or FACT. The Action Types display different fields based on the type that is selected. The default type for an Action Detail record is Custom.

2.4.2 Action Detail Mockup

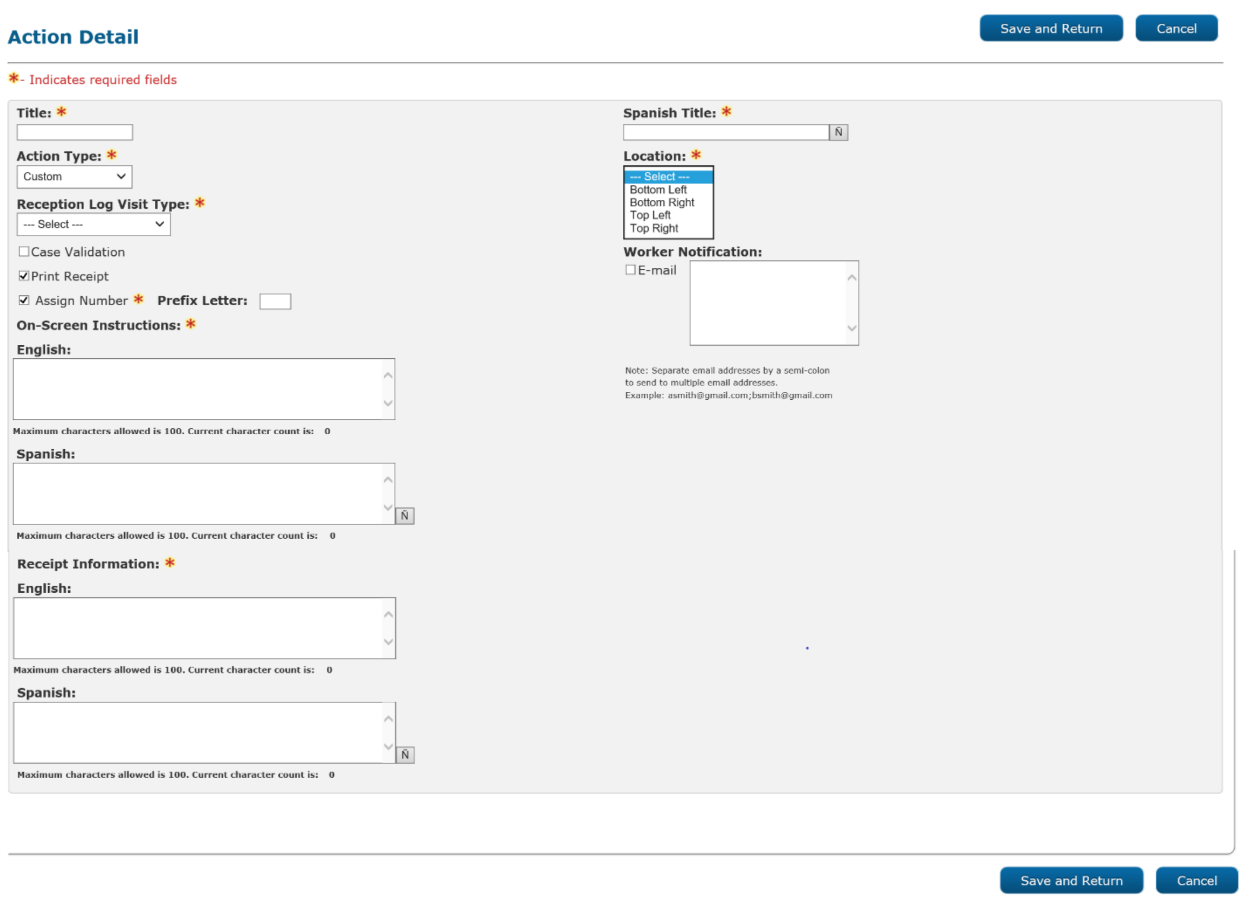


Figure 2.4.1a Action Detail Custom Action Type – Create Mode

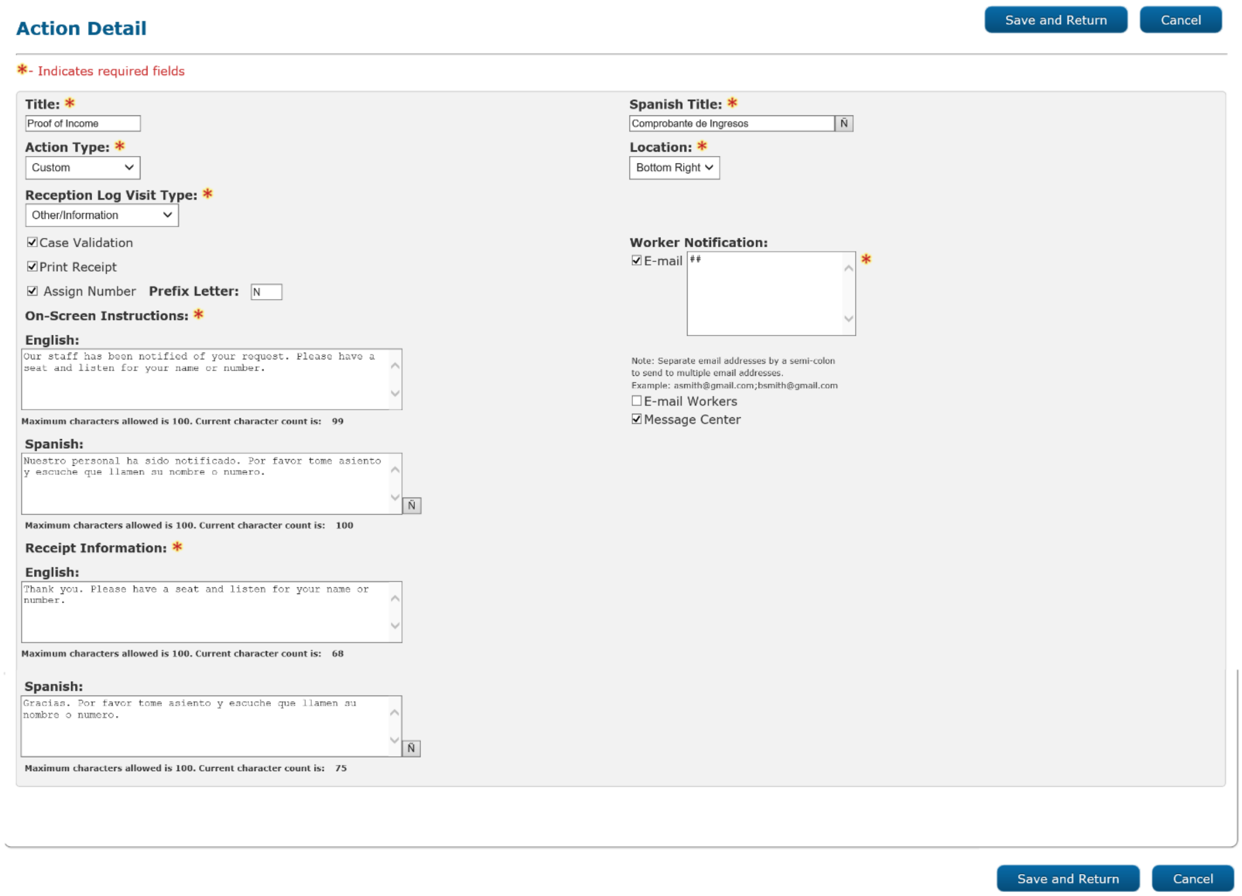


Figure 2.4.1b Action Detail Custom Action Type – Edit Mode

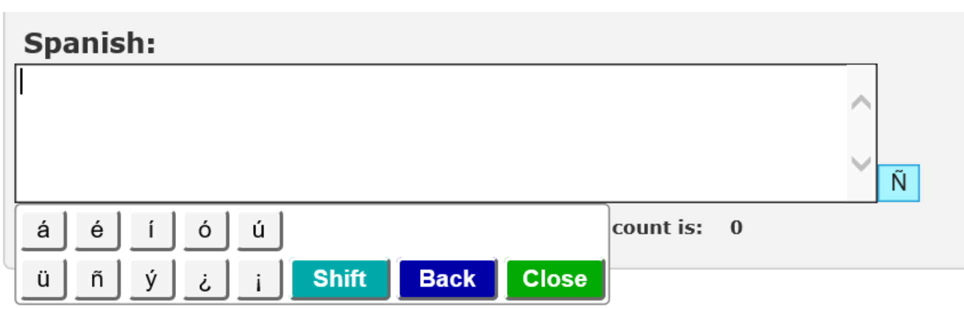
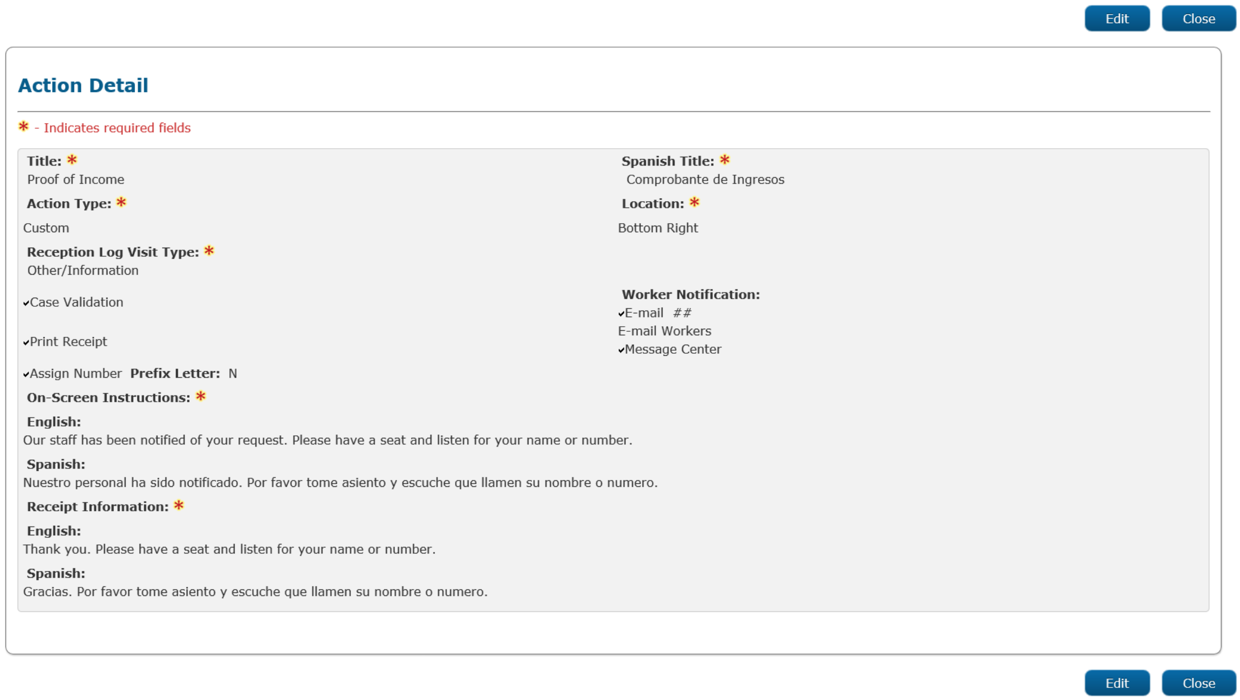


Figure 2.4.1c Action Detail Custom Action Type Spanish Keyboard



Edit Close

Action Detail

* - Indicates required fields

Title: *
Proof of Income

Spanish Title: *
Comprobante de Ingresos

Action Type: *
Custom

Location: *
Bottom Right

Reception Log Visit Type: *
Other/Information

✔Case Validation

Worker Notification:
✔E-mail ##
E-mail Workers
✔Message Center

✔Print Receipt

✔Assign Number **Prefix Letter:** N

On-Screen Instructions: *

English:
Our staff has been notified of your request. Please have a seat and listen for your name or number.

Spanish:
Nuestro personal ha sido notificado. Por favor tome asiento y escuche que llamen su nombre o numero.

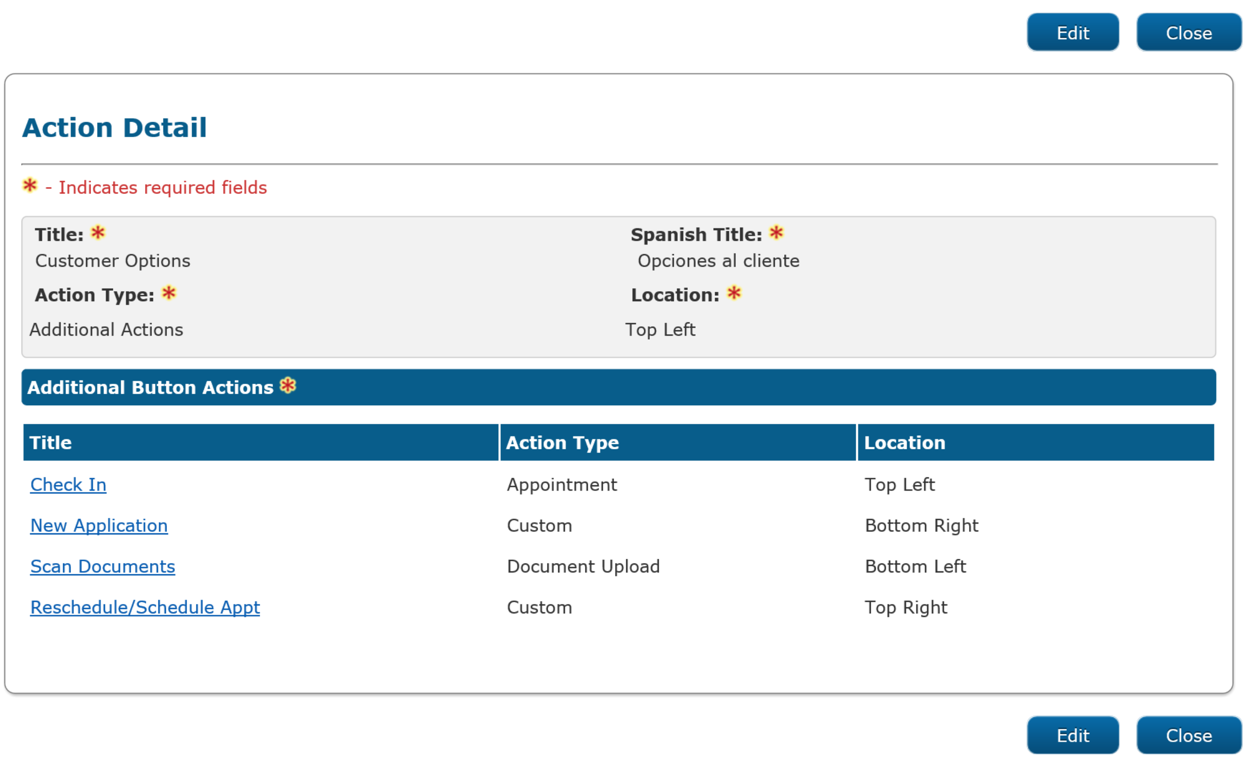
Receipt Information: *

English:
Thank you. Please have a seat and listen for your name or number.

Spanish:
Gracias. Por favor tome asiento y escuche que llamen su nombre o numero.

Edit Close

Figure 2.4.1c Action Detail Custom Action Type – View Mode



Edit Close

Action Detail

* - Indicates required fields

Title: *
Customer Options

Spanish Title: *
Opciones al cliente

Action Type: *
Additional Actions

Location: *
Top Left

Additional Button Actions *

Title	Action Type	Location
Check In	Appointment	Top Left
New Application	Custom	Bottom Right
Scan Documents	Document Upload	Bottom Left
Reschedule/Schedule Appt	Custom	Top Right

Edit Close

Figure 2.4.1d Action Detail Additional Button Actions – View Mode

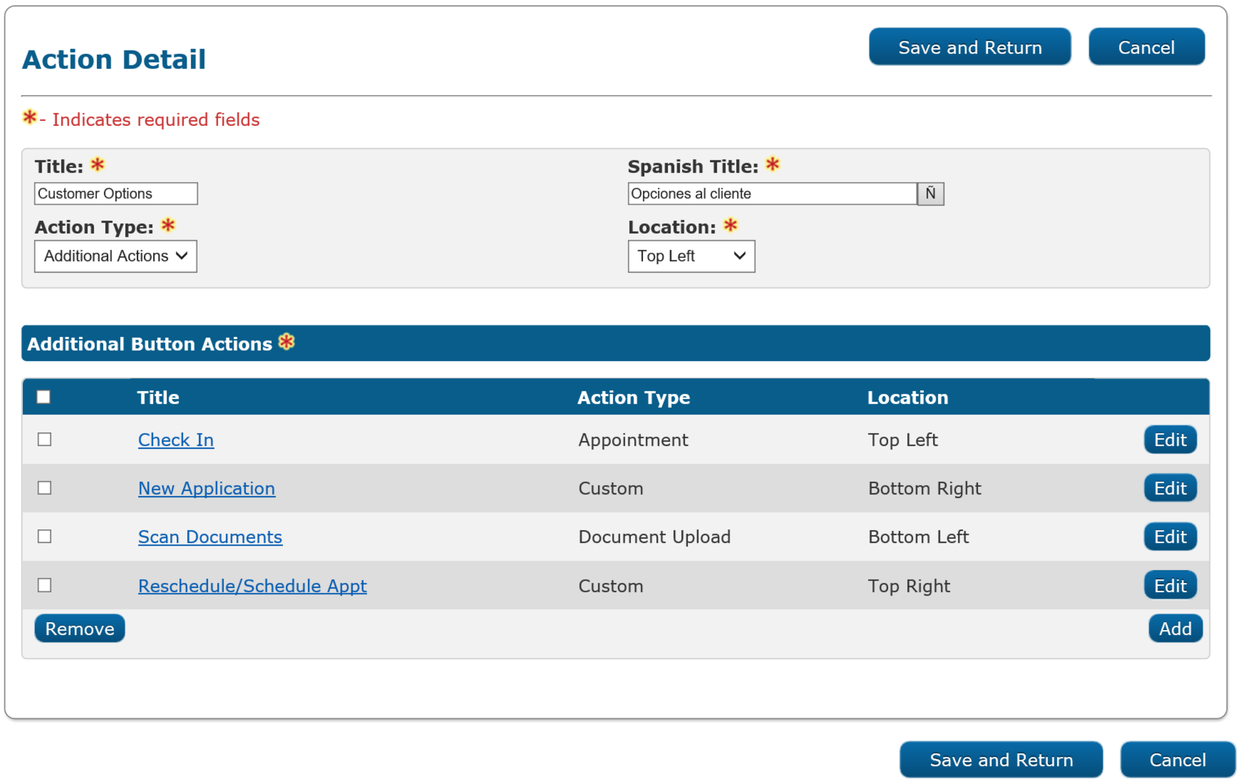


Figure 2.4.1e Action Detail Additional Button Actions – Edit Mode

2.4.3 Description of Change

1. The Custom Action Type will allow the user to select whether case validation is required, whether the customer will receive a receipt and what the receipt will state, and/or whether the customer receives an assigned number and prefix.
    a. Custom will be the default Action Type when a new Action Detail record is created.

2. The Appointment Action Type is a predefined action to be used for customers checking in for appointments. This includes requiring case validation, printing a receipt, and automatically sending a notification via the Message Center.
    a. Case Validation – Required, checkbox cannot be deselected.
    b. Worker Notification – If the user has Message Center security rights, Message Center is available. Counties can also include E-mail.
    c. Print Receipt – Required, checkbox cannot be deselected.
    d. Assign Number – Optional.
    e. Receipt Information – A receipt is required and will indicate the appointment they have checked in for. This will be the message that is printed on the receipt for the customer. Both

English and Spanish text is required.

3. The Document Upload Action Type will allow the user to use the predefined action for customers uploading documents directly to their case. This includes requiring case validation and printing a receipt.
    a. The Document Upload Action Type is not available when a device type of FACT has been selected.
    b. Case Validation – Required, checkbox cannot be deselected.
    c. Print Receipt – Required, checkbox cannot be deselected.
    d. The On-Screen Instructions text is not an option. The screens are predefined.
    e. If the document being scanned is a barcoded document, the document will be marked as received on the case.
    f. The Reception Log entry created will automatically have a Completed status after Waiting.

4. The Additional Actions Action Type will allow the user to define up to four more actions the customer can choose from. These actions can include the Custom, Appointment, and Document Upload action types.
    a. The Action Type "Additional Actions" will not be available for additional button actions
5. On the Action Detail page in View Mode as seen in Figure 2.4.1c Action Detail Custom Action Type – View Mode align the text fields with the label fields to be consistent.

Page Fields:

- Title – This is the button label that will display on the Kiosk "How can I help you?" screen. Both the English and Spanish labels are required.
    - An additional button labeled Ñ will display for Spanish textboxes. This will open a button selection for Spanish characters.
    - The character limit of each label is 30 characters..
- Location – This is the location of the action on the Action Selection Kiosk screen. The available options are: Top Left, Top Right, Bottom Left, and Bottom Right.
- Reception Log Visit Type – The list of Visit Types displayed on the Reception Log Detail page. The selected Visit Type will be used for the Reception Log visit entries created by the Kiosk.
- Case Validation – The customer will be required to enter their case number or swipe their EBT/BIC card. The case information will be used when the Reception Log entry is created.
- Worker Notification – E-mail with text box will always display as an optional checkbox. If Case Validation is selected, the E-mail Workers and Message Center checkboxes will display. A notification will automatically be sent to the assigned workers of the case.

- Print Receipt – The customer will receive a receipt from the Kiosk when the action is complete.
- Assign Number – The customer will receive an auto generated assignment number from the kiosk when the action is complete.
    - Each office will use the same sequence and it will be reset each night.
- Prefix Letter – If the Assign Number is selected, the Prefix Letter field will display. The assignment number will be listed with a letter prefix, i.e. B24. The same prefix letter will be used each time the action is performed.
- On-Screen Instructions – This will be the message that displays on the Kiosk "On Screen Instructions" screen. Both English and Spanish text is required.
    - The character limit of each textbox is 100 characters. A countdown of used characters will appear under each description field.
- Receipt Information – If Print Receipt is selected, this section will display. This will be the message that is printed on the receipt for the customer. Both English and Spanish text is required.
    - The character limit of each textbox is 100 characters. A countdown of used characters will appear under each description field.
- If Case Validation is not selected, Assign Number is required.

2.4.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.4.5 Security Updates

N/A - Security rights are listed above.

2.4.6 Page Mapping

PMCR for new page.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Select Device

2.5.1 Overview

The Select Device page will allow the user to select the devices from their office for the flow being defined.

2.5.2 Select Device Mockup

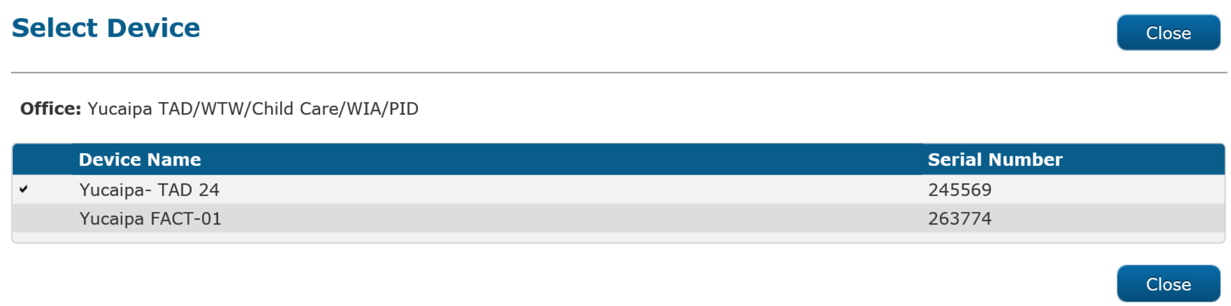


Figure 2.5.1a Select Device View Mode

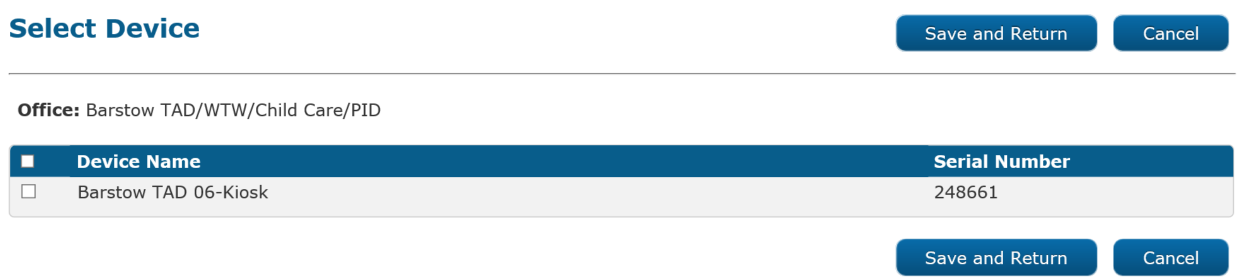


Figure 2.5.1b Select Device Edit Mode

2.5.3 Description of Change

1. The Select Device page is accessed from the Flow Management Detail page by clicking on the Office name under the Devices section.
2. View Mode – Displays the devices for the viewed office with read-only checkmarks for the devices in use.
    a. "Close" button navigates the user back to Flow Management Detail
3. Edit Mode – Displays the devices for the logged in user's office. The user can select the available devices on the page.

2.5.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1024	The CONTRACTOR shall migrate the Device Assignment Detail page.	**Original:** The "Device Assignment" page that exists in C-IV at the time the existing C-IV functionality for the page is migrated will also be ported into CalSAWS. - There will be minimal effort to migrate in the C-IV Kiosk and Lobby Web Services build as the only anticipated impact is the LRS data model changes in the web services. **Revised:**	Added the Device Assignment Detail page.
1025	**Original:** The CONTRACTOR shall migrate the Device Flow Mgmt. task navigation and the child pages of Flow Management List page and Flow Management Detail page. **Revised:** The CONTRACTOR shall migrate the Device Flow Mgmt. task navigation, Flow Management List, Flow Management Detail, and related child pages.	**Original:** The "Device Flow Mgmt." page that exists in C-IV at the time the existing C-IV functionality for the page is migrated will also be ported into the CalSAWS. **Revised:**	Add the Device Flow Mgmt. pages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207409 | DDID 1005

Update Office Public Hours of Operation

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brian Munce, Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/03/2019	1.0	Initial draft of Online changes	Brian Munce
06/27/2019	1.1	Added Customer Appointment Detail	Brian Munce
8/12/2019	1.2	Added batch changes	Avi Bandaranayake
08/14/2019	1.3	Added Correspondence recommendations	Brian Furlong
06/22/2020	1.4	Updated to include Correspondence Office Hours section and removed Correspondence recommendations.	Melissa Mendoza
07/27/2020	1.5	Updated Assumption #2 per CalSAWS DEL 37 Comments Log	Jasmine Chen

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1 OVERVIEW

This SCR facilitates setting varying office hours for individual days of the week, and updates existing functionalities that depend on office hours to support the new format.

1.1 Current Design

The Office Detail page specifies the start time and end time for Public Hours of Operation for each office.

1.2 Requests

Per DDID 1005, update the Office Detail page so that Public Hours of Operation can vary based on the day of the week.

1.3 Overview of Recommendations

1. Update the Office Detail page with a new table section that allows each office to specify the start and end time for Public Hours of Operation with a row for each day of the week.
2. Update the Customer Appointment Detail page to use the revised hours when clicking the Suggest Time(s) button.

1.4 Assumptions

1. The current functionality allows the user only to select times in 15 minute increments. This will remain unchanged.
2. The existing office hours section on the Office Detail page will be relabeled Correspondence Office Hours so that the following existing forms/notices that have Office Hours prepopulated will not be impacted.
    - CW 215 – Notification of Intercounty Transfer
    - MC 216 – Medi-Cal Renewal Form
    - MC_NOA_LETTER_TEMPLATE - Hunt v Kizer notice generated through EDBC.
    - CW_CF_NOA_LETTER_TEMPLATE - CW 10 generated through EDBC
    - Q_NOA_TEMPLATE - MSP NOA Template
    - H_STATIC_FOOTER - MAGI footer that generates on MAGI NOAs
3. YBN and IVR will not be impacted with this design and will continue to use the Correspondence Office Hours until the completion of the Self-Service Portal and IVR solution is in place for all 58 counties.

2 RECOMMENDATIONS

2.1 Office Detail

2.1.1 Overview

Update the layout of the Public Hours of Operation section of the Office Detail page to enable selecting specific Start and End Times for each day of the week.

2.1.2 Office Detail Mockup

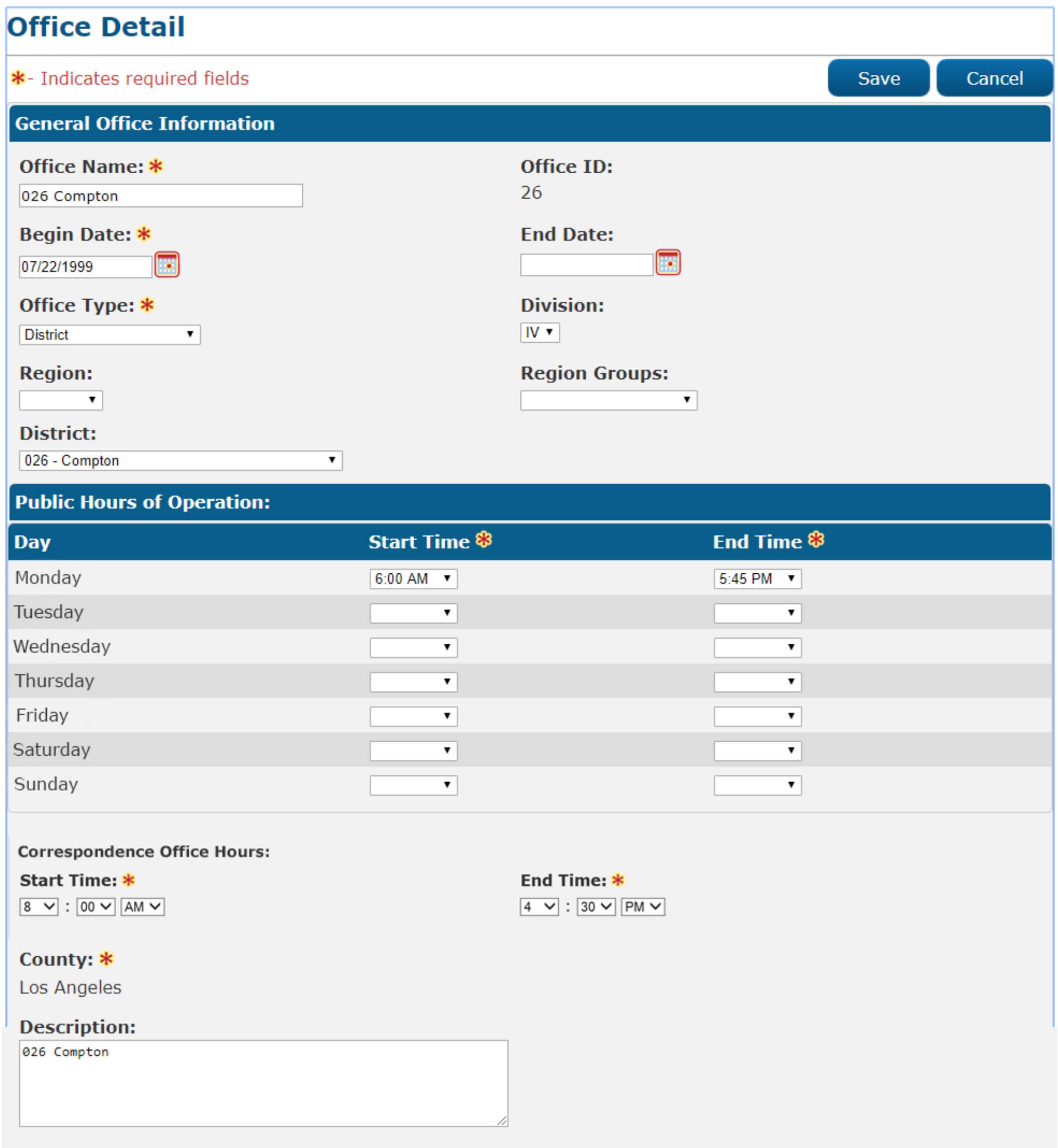

Figure 2.1.2 – Office Detail

2.1.3 Description of Changes

1. Move the "Public Hours of Operation" label of the Office Detail page.
    a. Create a new table section titled "Public Hours of Operation" on the page.
        i. The column headers will be "Day", "Start Time", and "End Time".
        ii. Each row will be labeled with a different Day, beginning with Monday then proceeding consecutively to the following days of the week and ending with Sunday.
        iii. The Start Time and End Time columns will contain select menus with options available beginning with "12:00 AM" and then proceeding through the day at 15-minute increments (i.e. "12:15 AM", "12:30 AM", …), ending at 11:45 PM as the last available time.
        iv. Update the existing validation on the Start Time field that requires the Start Time to be earlier than or equal to the End Time for the modified Start Time and End Time fields. The message will remain the same (no functional impact).
        v. Monday-Friday will be required, and Saturday and Sunday will be optional. Required validation will display for Monday through Friday if the fields are not completed.
    b. Relocate the existing "County" field to a new row between the new "Public Hours of Operation" table and the existing "Description" field.
2. Replace the existing label Public Hours of Operation with Correspondence Office Hours. This will be used to populate existing forms in the system that use the current office hours format.
    a. The label is changing but the table values should remain so that correspondence is not impacted by this change.

2.1.4 Page Location

Global: Admin Tools

Local: Office Admin

Task: Office

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mappings to include mapping for the Day column and update the verbiage of the page mappings for the Start Time and End Time fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Customer Appointment Detail

2.2.1 Overview

Update the functionality to suggest times for an appointment to accommodate the new structure for office hours.

2.2.2 Customer Appointment Detail Mockup

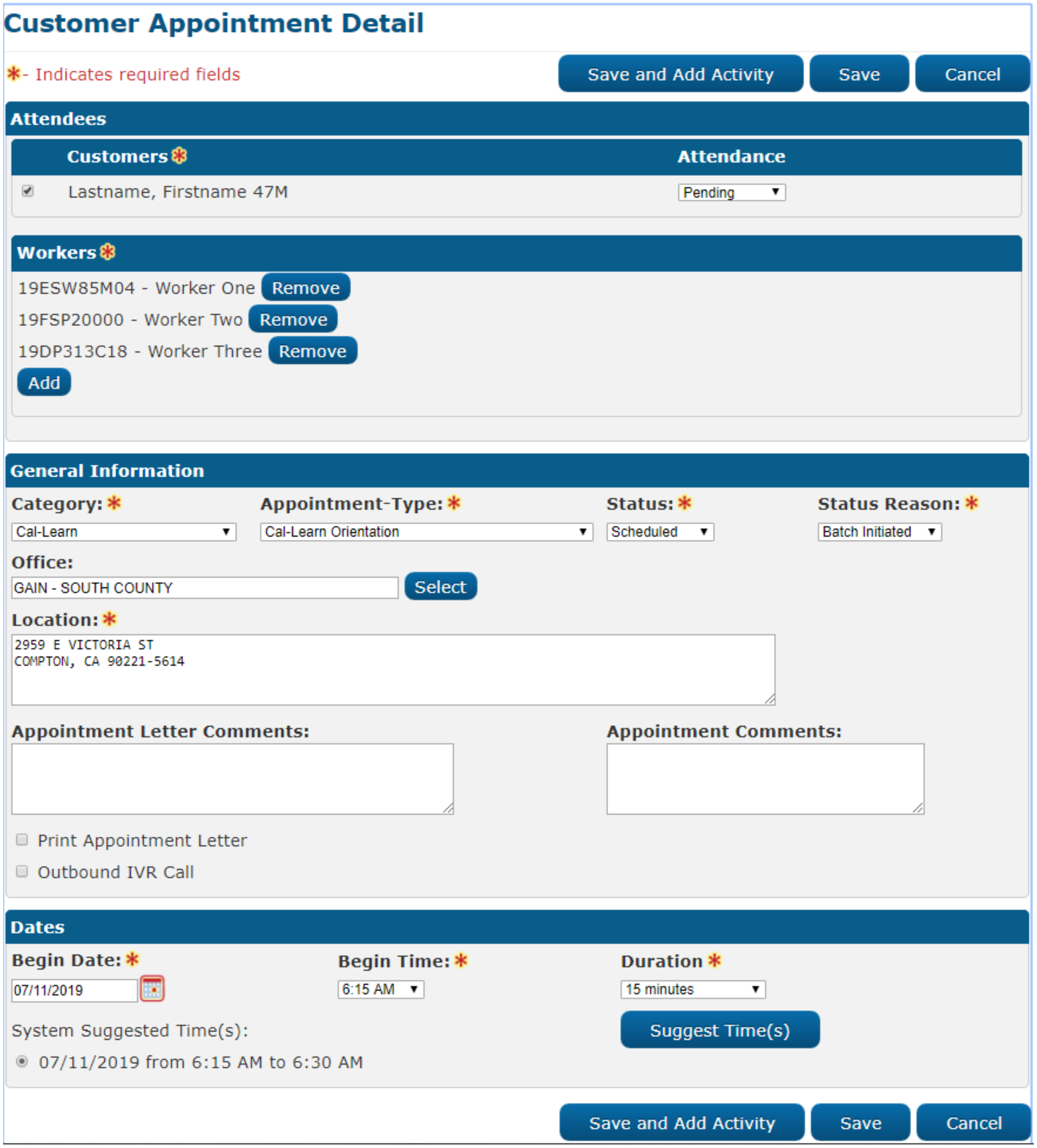

Figure 2.2.2 – Customer Appointment Detail

2.2.3 Description of Changes

1. Update the implementation for the Suggest Time(s) button. Times will now be suggested based on the provided parameters and the office hours that are set for the specific day of the week that the specified Begin Date falls on.

2.2.4 Page Location

Global: Admin Tools

Local: Office Admin

Task: Office

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

Usage of this button would be expected to remain the same, so there should be no change in page usage. The Suggest Time(s) button only reads from the database, so there is also no impact to data volume.

2.3 Batch Appointment Jobs

2.3.1 Overview

Update batch appointment jobs that currently use a single start time and end time for a given office to utilize the hours per day as specified on the Office Detail page.

2.3.2 Description of Change

Modify the following batch jobs to accommodate the change to the office hours data structure.

Job Number	Short Description
JBXXC898D	NonCompliance Appointment Batch
JBXXC899D	Assign Next Activity Appointments Batch
PBXXC902	CW/CF Recertificationi Job Day-1
PBXXC903	SSIAdvocacyMandatoryAppointmentsBatch
PBXXC904	Second SSIAppointmentsBatch
PBXXC905	GCMAppointmentsBatch
PBXXC906	SsiapNsaAppointmentsBatch

Job Number	Short Description
PBXXC909	CW/CF Recertificationi Job Day-2
PBXXM115	Pending unassigned pool appraisal batch

Technical Note:

Any reference to the old data model using a single HR_OF_OP_START_TIME and HR_OF_OP_END_TIME will need to be replaced with the new data model for the batch jobs listed above.

2.3.3 Execution Frequency

No change

2.3.4 Key Scheduling Dependencies

No change

2.3.5 Counties Impacted

All counties

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

No change

2.4 Data Change – Office Detail

2.4.1 Overview

Update the new table using the existing office hours that are in the system for Los Angeles County.

2.4.2 Description of Change

1. Run a Data Change to update the days of the week to Monday-Friday using the current begin and end time for each office. Offices will need to update weekend hours manually if necessary.

2.4.3 Estimated Number of Records Impacted/Performance

Existing Offices for LA County: 390 records.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1005	The CONTRACTOR shall update the Public Hours of Operation Start Time and End Time fields to display for each day of the week on the Office Detail page.		The Public Hours of Operation Start Time and End Time fields are expanded into a new section with both fields available for each day of the week.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207434 | DDID 606

Update Reception Log List and Detail pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/02/2020	1.0	Initial	Erika Kusnadi-Cerezo
07/16/2020	2.0	Updated numbering for section 2.1.3. Added that values in purpose field will be listed in alphabetical order for bother new and existing values. Lastly, an assumption was added for regression testing for the Lobby Management dashboard.	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Reception Log is used to manage and track participants who are visiting the County offices.

1.1 Current Design

Currently in the C-IV system the Reception Log List and the Reception Log Detail pages have more options available for the workers to choose from in the "Visit Type" field ("Purpose" field in LRS/CalSAWS) that are not available in the LRS/CalSAWS. Secondly, the Visit Type information also determines the prefix information for the number that is assigned to the customer when they check in.

1.2 Requests

Per DDID 606 update the "Purpose" field in the Reception Log List and Reception Log Detail page to add additional values.

1.3 Overview of Recommendations

1. Add the following values to the "Purpose" field in the Reception Log List and Reception Log Detail page and associate the new values with the appropriate prefix information for the number assigned to the customer at check-in.
    a. Agency Partners
    b. Collections
    c. Group Session
    d. Health Care Options
    e. IHSS
        i. Relabel the IHSS value to IHSS/CMIPS II
    f. Leave Msg for Worker
    g. Medi-Cal Card
    h. Other/Information
    i. Pick Up Warrant/Valuable
    j. Screening

1.4 Assumptions

1. Existing C-IV data with 'Live Scan' visit type will be mapped to 'Fingerprint' and 'IHSS' visit type will be mapped to 'IHSS/CMIPS II' at the time of conversion.
2. Regression testing will be conducted to ensure that the new values are being captured in the Lobby Management Dashboard.

2 RECOMMENDATIONS

Add additional values in the "Purpose" dropdown field in the Reception Log List page and the Reception Log Detail page and associate these new values to a prefix that will be assigned to the customer at check-in.

2.1 Reception Log List and Reception Log Detail

2.1.1 Overview

Display additional values in the "Purpose" field in both the Reception Log List page and the Reception Log Detail page so that users have additional options to choose from. Secondly, associate these new values to a prefix that will be assign to the customer when they check-in.

2.1.2 Mockup

N/A for dropdown value changes only.

2.1.3 Description of Changes

1. Add the following values to display on the "Purpose" field dropdown list.
   a. Agency Partners
   b. Collections
   c. Group Session
   d. Health Care Options
   e. IHSS/CMIPS II
      i. This value is displayed as IHSS in the C-IV System but will be relabeled to IHSS/CMIPS II in LRS/CalSAWS
   f. Leave Msg for Worker
   g. Medi-Cal Card
   h. Other/Information
   i. Pick Up Warrant/Valuable
   j. Screening
2. Associate the above values to be assigned a number with the Prefix 'C', for when customers are checking in with any of the above "Purpose" types.
3. Values in the "Purpose" field will be listed in Alphabetical order, this will apply to both existing value and new values being added as part of this SCR.

Technical Note: Category ID 149 in the LRS/CalSAWS database already has the above values but they are not currently being displayed in the "Purpose" field dropdown on the Reception Log pages.

2.1.4 Page Location

- **Reception Log Link on the LRS Home Page**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
606	**Original:** The CONTRACTOR shall update the Reception Log Detail page and the Reception Log List page as follows: 1) Migrate the following values in the "Purpose" field: a) Agency Partners b) Collections c) Group Session d) Health Care Options e) IHSS f) Leave Msg for Worker g) Live Scan h) Medi-Cal Card i) Other/Information j) Pick Up Warrant/Valuable k) Screening 2) Relabel "IHSS" to "IHSS/CMIPS II" **Revised:**	N/A	Database will be updated to rename the IHSS value to IHSS/IHSS/CMIPS II. Secondly, these values will be displayed on the Reception Log pages under the Purpose field. "Live Scan" is no longer needed since user can use Fingerprint instead. These values will also be associated to the Prefix 'C' when the customer is assigned a number at check-in.

	The CONTRACTOR shall update the Reception Log Detail page and the Reception Log List page as follows: 1) Migrate the following values in the "Purpose" field: a) Agency Partners b) Collections c) Group Session d) Health Care Options e) IHSS f) Leave Msg for Worker g) Medi-Cal Card h) Other/Information i Pick Up Warrant/Valuable j) Screening 2) Relabel "IHSS" to "IHSS/CMIPS II"		

California Statewide Automated Welfare System

Design Document

CA-207435 | DDID 589

Update Customer Schedule Search to relabel 'YBN Appointment #'

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sadia Islam
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/16/2020	1.0	Original document	Sadia Islam
07/16/2020	1.1	Updated mockup section title per QA feedback	Sadia Islam

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1 OVERVIEW

This System Change Request (SCR) documents the changes required for the "YBN Appointment #" on the Customer Schedule Search page.

1.1 Current Design

In LRS/CalSAWS, the "YBN Appointment #" is a non-mandatory, free form text field that may be used to enter the participant's appointment number from the YourBenefitsNow! Portal in order to limit the search criteria on the Customer Schedule Search page.

1.2 Requests

Per Design Difference ID (DDID) 589, relabel the "YBN Appointment #" field to the name of the new self-service portal on the Customer Schedule Search page.

Note: The name of the new self-service portal for all 58 counties has not been defined at this time.

1.3 Overview of Recommendations

1. Relabel the "YBN Appointment #" field on the Customer Schedule Search page.

1.4 Assumptions

1. N/A

2 RECOMMENDATIONS

2.1 Customer Schedule Search

2.1.1 Overview

The Customer Schedule Search page allows the user to search and view a participant's appointments. The "YBN Appointment #" field shall be updated on this page.

2.1.2 Customer Schedule Search Mockup

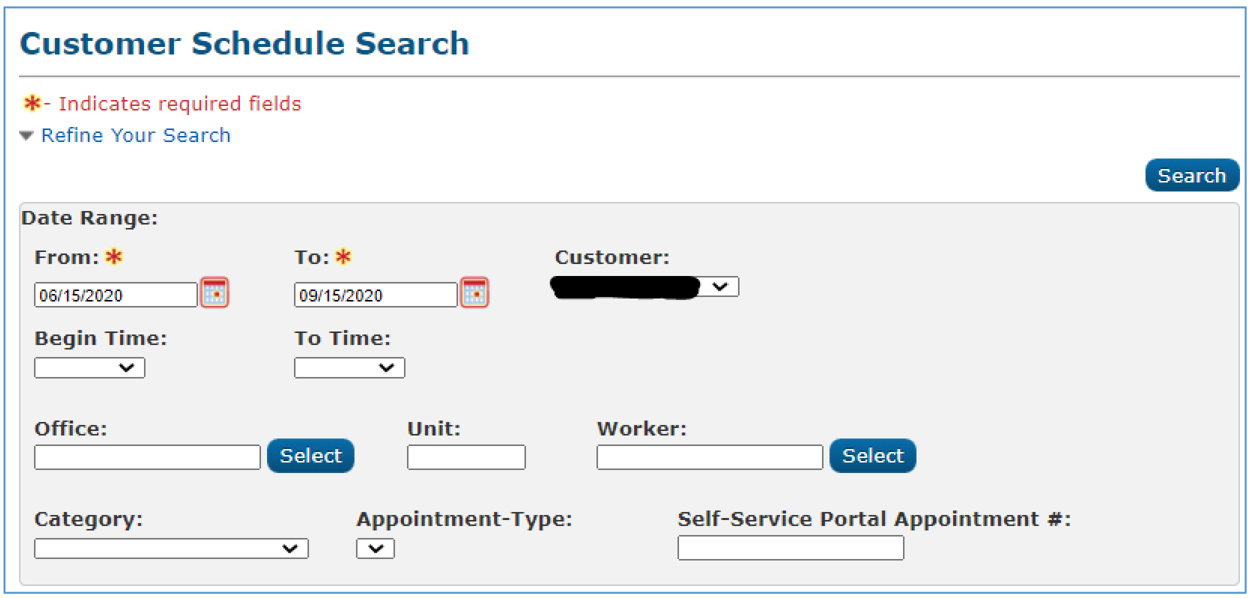

Figure 2.1.1 – Customer Schedule Search Page

2.1.3 Description of Changes

1. Relabel the "YBN Appointment #" field to "Self-Service Portal Appointment #".

2.1.4 Page Location

- **Global: Case Info**
- **Local: Customer Schedule**
- **Task: N/A**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the relabeled field.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
589	The CONTRACTOR shall relabel the "YBN Appointment #" to the name of the new self-service portal on the Customer Schedule Search page.	N/A	"YBN Appointment #" field renamed.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207476 | DDID 266

Update No Change SAR 7 functionality to be configurable

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sowmya Coppisetty
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/7/2020	1.0	Draft	Sowmya Coppisetty
5/27/2020	1.1	Re-ordered section 2.1.2	Avi Bandaranayake
6/24/2020	1.2	Revised document per QA comments	Sowmya Coppisetty
7/27/2020	1.3	Revised document per QA comments	Sowmya Coppisetty

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1 OVERVIEW

This DDID covers changes to update the existing daily SAR7 No Change Batch Job to allow it to run for all 58 counties.

1.1 Current Design

The SAR 7 No change batch sweep will create eligibility triggers for all programs when SAR7 is received from Kofax interface and marked as No Change.

This batch sweep job currently runs for Los Angeles County (County 19) only.

1.2 Requests

Update the SAR7 No Change Batch Job to be available for the 57 migration counties.

1.3 Overview of Recommendations

1. Create a new Batch Property Change Request (BPCR) to add counties to the County Code List.
2. Update the batch job to run for the counties in the list.

1.4 Assumptions

1. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted in to the batch job.
2. The scheduling SCRs mentioned above will cover the opt in/out functionality and can be verified once implemented.

2 RECOMMENDATIONS

2.1 SAR7 No Change Job

2.1.1 Overview

Update the SAR7 No Change (JB19E458D) batch job to use a county parameter list so that the batch job can run for all counties.

2.1.2 Description of Change

1. Rename the batch job to be a '00' job.
2. Update the batch job to use the CountyCodeList to determine which counties the job should run for.
3. Create a BPCR to update the CountyCodeList property to include all 58 counties.

2.1.3 Execution Frequency

Daily

2.1.4 Key Scheduling Dependencies

No change.

2.1.5 Counties Impacted

All counties.

2.1.6 Data Volume/Performance

Unknown.

2.1.7 Failure Procedure/Operational Instructions

No change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
266	The CONTRACTOR shall update the functionality that automatically updates the Periodic Reporting Detail page when there is "No Change" identified on a SAR 7 for all 58 counties to be county configurable at the time of migration.	The Batch properties and scheduling will have to be updated for each wave separately.	Update job to use a county parameter list. Update the job parameters to include all the counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207578

DDID #1769 - Audit: Update Audit to store multi-county user records

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Marvin Paparisto
	Reviewed By	Sumeet Patil

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/12/2020	1.0	Initial Draft	Marvin P.

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1 OVERVIEW

This SCR will make the following updates to the Auditor application:

1. Enable multi-county user transactions to be displayed on audit reports for transactions that are peformed in the same county as that of the auditor.
2. Refactor the application to make web service calls to the LRS Web Services application to obtain information from the CalSAWS database, rather than connect to the database itself.
3. Add an additional column to the audit report for the case county code – the county code of the case accessed by a user.

1.1 Current Design

The auditor application does not show any transactions from multi-county users because the users have a different county from that of the auditor (i.e. county 90 or county 92). The application also directly depends on the CalSAWS database to acquire information about an audited user – such as their county code or type code. And the generated report only displays the user county, not the county of any accessed cases.

1.2 Requests

The auditor application needs to be modified so that if a multi-county user is audited, the generated report will show transactions they performed in the auditor's county. The application should not have a direct dependency on the CalSAWS database, but should obtain the data it needs from LRS Web Services. And lastly, the generated report should have an additional column of case county for every transaction.

1.3 Overview of Recommendations

1. Modify the auditor application so that if the audited user is a multi-county user, the application uses the auditor's county, rather than 90 or 92, as the county to parameterize the database query.
2. Refactor the audit application so that direct queries to the the CalSAWS databse are replaced by REST calls to a new webservice on the LRS Web Services application.
3. Create a new database column to store case county entries and include it in the generated report. Add a case county code to each message transmitted to the auditor application.

2 RECOMMENDATIONS

See Overview of Recommedations

2.1 Online User Action Audit Report

2.1.1 Overview

The layout of the page will not be changed, but the generated audit report will be different for multi-county users.

2.1.2 Description of Changes

If a multi-county user is audited, and that user performed transactions in the auditor's county, when a report is generated, the transactions in that county will be included.

A new column called Case County Code will be presented in the audit report, which contains the county code of the case accessed by a user.

2.1.3 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Audit

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208253 DDID 713

Update Automated Regression Test (ART) scripts to account for CalSAWS Migration R7 system modifications

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	William Baretsky
	Reviewed By	Amy Gill, Sharon Teramura

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/7/2020	1.0	Original	William Baretsky
7/13/2020	1.1	Additional SCR added to coverage list: CA-213659	William Baretsky
7/20/2020	1.2	Additional SCR added to coverage list: CA-211763	William Baretsky
7/27/2020	1.3	Additional SCR added to coverage list: CA-53785	William Baretsky

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1 OVERVIEW

1.1 Current Design

The suite of Automated Regression Test (ART) scripts are executed against the C-IV and LRS applications on a scheduled basis throughout each major release cycle. The ART scripts are updated as needed to account for system modifications implemented within each of the C-IV (M&O) and LRS (M&E) releases.

1.2 Requests

The ART scripts should also be updated to account for the system modifications being made as part of each CalSAWS Migration (DD&I) release.

1.3 Overview of Recommendations

Update the ART scripts to account for the system modifications being made as part of the CalSAWS Migration R7 release. Update the underlying framework code modules used by the ART scripts as needed to support these changes.

1.4 Assumptions

1. No technical enhancements to the ART framework are required for CalSAWS R7.
2. The functional scope of the ART suite and each ART script will remain unchanged.
3. No more than 70% of the ART scripts will need to be updated.
4. No more than 30% of the ART framework code modules will need to be updated.

2 RECOMMENDATIONS

2.1 CalSAWS System Change Scope

2.1.1 Description of Changes

Update the ART scripts and underlying code modules to account for the system modifications being made under each of the following R7 SCRs:

SCR #	Summary
53785	DDID 1967: DDCR 5014: ACL 08-07 - WPR is excluding Sanctioned cases with fewer than four sanctions in the 11 months prior to the benefit month
200404	DDID 1967: Update the E2Lite Interface/WPR Sample Process to Handle Late Case Submissions
201968	DDID 1967: DDCR 4099: Add WTW Activity Attendance and Progress Forms
207133	DDID 2213 - Update Appointment functionality with Customer Appointment Search page
207198	DDID 2079 - Allow Supportive Service Payments for Customer When WTW/REP Program is in Good Cause
207207	DDID 2067 - Add functionality to grant conditional eligibility for Medicare Savings Program (MSP).
207216	DDID 2058 - Update display of CalHEERS Verifications on Data Collection List pages
207252	DDID 1778 - Updates to LRS Lobby Apps, Kiosk and FACT functionality
207399	DDID 1039 - Migrate C-IV RE Packets for CW and CF
207405	DDID 1024, DDID 1025: Migrate the Device Flow Management functionality
207409	DDID 1005 - Update the Public Hours of Operation Start Time and End Time fields to display for each day of the week on the Office Detail page.
207434	DDID 606 - Update Reception Log List and Detail pages
207435	DDID 589 - Update Customer Schedule Search to relabel 'YBN Appointment #'
211763	DDID 1967: Migrate the MC 358S (12/02)
211773	DDID 1967: Migrate the CF 377.5 SAR (9/13)
213164	DDID 1967: eHIT updates for Conditional Medicare changes
213493	DDID 1052, 1092, 1094, 1095, 1096 - Updates to Fiscal Authorization
213659	DDID 1787, DDID 1789 - Migrate the C-IV County Specific Batch Jobs (Phase 4)

SCR #	Summary
214196	DDID 1967: Remove System, County, or Agency specific references/logos from Form headers
214197	DDID 1967: Update Template Repository to display Correspondence based on County
214198	DDID 1967: Update State Form Batch jobs to run for all Counties
214353	DDID 374 - Update 1099 Interfaces for Migration Counties to Process EDBC Authorized Issuances
215978	DDID 2080: Update Actual Hours History page to include Excused Hours

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
713	The CONTRACTOR shall review and update the C-IV and LRS suite of Automated Regression Test (ART) scripts as required to account for the system modifications being made as part of the CalSAWS Migration. A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized and run automatically on an agreed upon frequency against the CalSAWS Software. The CONTRACTOR shall update the ART framework to support all browser versions supported by the CalSAWS Software.	N/A	Update the ART scripts to account for the system modifications being made under the CalSAWS Migration R7 SCRs. Update the ART framework code modules as needed to support the ART script changes mentioned above.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208569 | DDID 1967

Non-Compliance Updates to Handle Converted Data

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/25/2020	1.0	Initial Document	Yale Yee

Table of Contents

1 OVERVIEW

Non-Compliances are a mechanism for enforcing negative impacts to benefits issued to a customer when the customer has not complied with program requirements. LRS/CalSAWS removed and/or automated some of the Non-Compliances that are applied by worker action in C-IV. The conversion process will convert historical and active Non-Compliance records from C-IV into LRS/CalSAWS. The converted Non-Compliance reasons will be displayed on the Non-Compliance page.

Throughout this document, "Non-Compliance" is used as a general term, which may include data related to sanctions, penalties, periods of ineligibility, disqualifications, or other terms applicable to a specific program.

1.1 Current Design

LRS/CalSAWS removed and/or automated some of the Non-Compliance reasons that are applied by worker action in C-IV. The conversion process will convert historical and active Non-Compliance records from C-IV into LRS/CalSAWS.

1.2 Requests

1. Non-Compliance pages will allow viewing and editing converted Non-Compliance records that are not available in LRS/CalSAWS.
2. A validation message will display on the Run EDBC page if a Non-Compliance reason (not available in LRS/CalSAWS) is applicable in the benefit month.
3. Non-Compliance reasons (not available in LRS/CalSAWS) that are person level closures will preserve the converted role/role reasons when EDBC is run.

1.3 Overview of Recommendations

1. Converted Non-Compliance records will be viewable and editable on the Eligibility Non-Compliance page.
2. Display a validation message on Run EDBC for converted Non-Compliance reasons that are applicable to the EDBC benefit month.
3. Update EDBC logic to preserve a person's role/role reason for certain converted Non-Compliance reasons that are applicable to the EDBC benefit month.

1.4 Assumptions

1. CA-208565 will address the 'FTP Eligibility Forms' impacts identified in Non-Compliance Research Analysis (DDID 1054).
2. CCC-2329 will address lists for Cal-Learn and Chronic Truant Non-Compliances. Lists of cases with active Non-Compliances in C-IV will be provided after data conversion.

2 RECOMMENDATIONS

Non-Compliance records converted from C-IV to LRS/CalSAWS will be viewable and editable. A validation message will display before running EDBC to prompt the User that a converted Non-Compliance reason is applicable for the benefit month(s). The EDBC logic will be updated to preserve a person's role/role reason if the Non-Compliance reason is applicable for the benefit month(s).

2.1 Eligibility Non-Compliance Detail page

2.1.1 Overview

The Eligibility Non-Compliance Detail page displays details based on the information of the Non-Compliance record.

2.1.2 Eligibility Non-Compliance Detail Mockup

N/A

2.1.3 Description of Changes

1. Add the following Non-Compliance reasons with a begin date of 01/01/1000 and an end date of 12/31/9999. These will not be selectable for new Non-Compliance records:

Non-Compliance Type	Non-Compliance Reason
WTW	• Post WTW 24 MTC CW Fed Requirements Not Met
WTW	• WTW - Chronic Truant
Chronic Truant	• Cash – Chronic Truant
Chronic Truant	• Failure to Provide School Attendance

2. Display the following converted Non-Compliance reasons only for historical records on the Eligibility Non-Compliance Detail page in View and Edit mode:

Non-Compliance Type	Non-Compliance Reason
Cal-Learn	• Grade F • Late Report Card • No Report Card
Child/Medical Support	• Assign Support Rights • Child/Medical Support Non Co-op

Non-Compliance Type	Non-Compliance Reason
Procedural Requirement	• Found on SFIS • Immunizations • SSN • Didn't Register with EDD • Didn't Try to Collect a Debt
Spouse of Excluded MC Stepparent	• Spouse of Excluded MC Stepparent
WTW	• Didn't Participate/Progress in Activity • Didn't Sign WTW Plan • Post WTW 24 MTC CW Fed Requirements Not Met • Quit a Job • Reduced Earnings • Turned Down a Job • WTW - Chronic Truant
Chronic Truant	• Cash – Chronic Truant • Failure to Provide School Attendance
Failure to Provide	• Age Verification • County Residence • Graduate by Age 19 • HIC Number • Income Verif • Multiple Vehicles • Name/Identity • Non Citizen Documents • One Vehicle • Other Health Care Coverage • Property Verif • School Attendance • Sponsor Dependents • Sponsor Income • Sponsor Resource • Sponsor SOF • Verifications

3. If a historical record exists with one of the converted Non-Compliance reasons from the table above, the user will be able to edit the existing record. However, the user will not be able to select a different converted Non-Compliance reason from the table above.
   For example, the converted Non-Compliance record will display on the page. But when a Non-Compliance reason (not from the table above) is selected and saved, the converted Non-Compliance reason will no longer be available to be selected.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Compliance

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Run EDBC page

2.2.1 Overview

A validation message will display on the Run EDBC if a converted Non-Compliance reason (not available in LRS/CalSAWS) is applicable in the benefit month.

2.2.2 Run EDBC Mockup

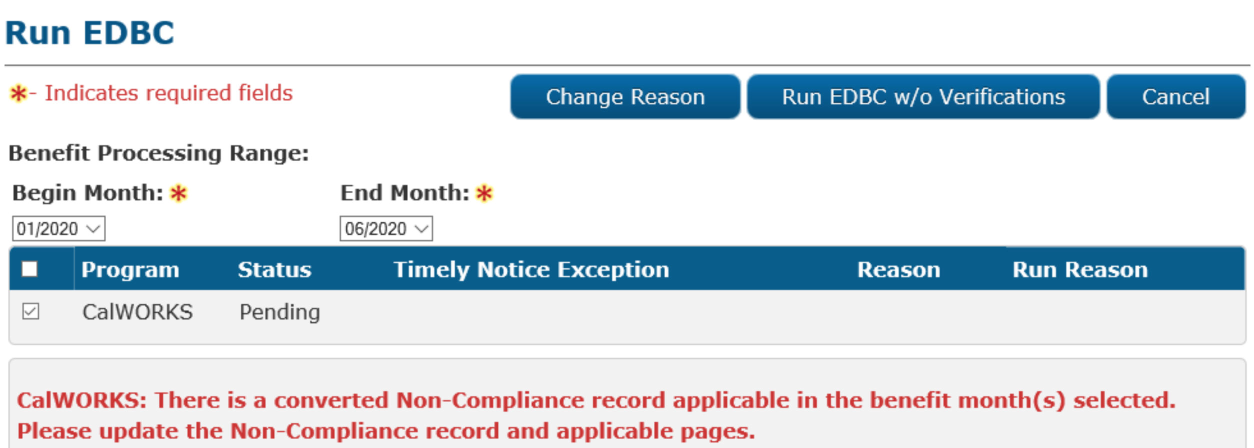

Figure 2.1.1 – Validation message for converted Non-Compliance records

2.2.3 Description of Changes

1. Display a validation message on Run EDBC when one of the following Non-Compliance reasons are applicable in the benefit month:

C-IV Non-Compliance Type	C-IV Non-Compliance Reason	CalSAWS page where data is recorded
Child/Medical Support	• Assign Support Rights • Child/Medical Support Non Co-op	Support Questionnaire
Procedural Requirement	• Immunizations	Immunization Detail
Procedural Requirement	• SSN	SSN Detail
WTW	• Didn't Participate/Progress in Activity • Didn't Sign WTW Plan • Post WTW 24 MTC CW Fed Requirements Not Met • Quit a Job • Reduced Earnings • Turned Down a Job • WTW - Chronic Truant	WTW program status

2. The validation message will display as:
    a. <Program Name>: There is a converted Non-Compliance record applicable in the benefit month(s) selected. Please update the Non-Compliance record and applicable pages.
3. The validation message will display in a red text and will allow the user to continue running EDBC.
4. The validation message will display after the Run EDBC button is clicked on the Run EDBC page.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Run EDBC

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Update EDBC Logic for Non-Compliance Record

2.3.1 Overview

Some Non-Compliances set status reasons on the EDBC that close the person without closing the entire program. These Non-Compliance records will potentially be converted from C-IV into LRS/CalSAWS for an active program. EDBC will preserve information based on the Non-Compliance record if the Non Compliance reason is applicable in the benefit month (e.g., the Non Compliance record is not end-dated).

2.3.2 Description of Changes

1. For person level closures (mentioned in section 2.1.3) that will not close the entire program, preserve the role/role reason on the EDBC if the Non-Compliance reason is applicable for the benefit month.

   This will allow the Non-Compliance to continue to be applied through EDBC when the User has not updated the appropriate data collection page or end-dated the converted non-compliance record.

   Example:

   A person has a high-dated Non-Compliance record Type of Procedural Requirement and a Reason of Immunization on a C-IV program. When the Non-Compliance record is converted from C-IV into LRS/CalSAWS, the Non-Compliance record will display on the Eligibility Non-Compliance Detail page. When the User runs EDBC, the Run EDBC page will display the validation message from Section 2.2. If the User is not able to update the Immunization Detail page and end-date the converted Non-Compliance record, EDBC will display the role/role reason (e.g., MMO/FTP Immunization) that was determined in the C-IV system if the Non-Compliance reason is applicable for the benefit month.

2.3.3 Programs Impacted

CF, CW, MC, DV, IN, RCA

2.3.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Converted Non-Compliance records are viewable and editable on the Eligibility Non-Compliance page. A validation message is displayed on Run EDBC for converted Non-Compliance reasons that are applicable to the EDBC benefit month. EDBC logic is updated to preserve a person's role/role reason for certain converted Non-Compliance reasons that are applicable to the EDBC benefit month.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-211763 | DDID 1967

Migrate the MC 358 S (12/02)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/29/2020	1.0	Initial Revision	Rainier Dela Cruz
07/27/2020	1.1	Updates from Deliverable and Build comments.	Rainier Dela Cruz
08/07/2020	1.2	Updates on field population.	Rainier Dela Cruz

Table of Contents

1 OVERVIEW

The purpose of this system change request is to migrate the C-IV MC 358 S (12/02) form to LRS/CalSAWS.

1.1 Current Design

The current MC 358 S form in LRS/CalSAWS does not match the State version. The current MC 358 S form in C-IV matches the State version.

1.2 Requests

Migrate the C-IV MC 358 S (12/02) form to LRS/CalSAWS.

1.3 Overview of Recommendations

1. End date the existing threshold languages for the MC 358 S in LRS/CalSAWS.
2. Update the existing English and Spanish version of the MC 358 S in LRS/CalSAWS to match the C-IV MC 358 S (12/02) form.
3. Update the automated batch process to no longer send out the MC 358 S form in the different threshold languages.

1.4 Assumptions

1. Only English and Spanish of the MC 358 S form will be implemented with this system change request. The threshold versions of the form will be implemented as part of **CA-217258**.
2. The imaging barcode for the MC 358 S will be added with **CA-217626**.

2 RECOMMENDATIONS

2.1 Migrate the MC 358 S Form

2.1.1 Overview

Update the existing English and Spanish version of the MC 358 S in LRS/CalSAWS to match the C-IV MC 358 S (12/02) form and turn off the threshold version of the form.

State Form: MC 358 S (12/02)

Programs: Medi-Cal

Attached Forms: N/A

Forms Category: NOA

Languages: English, Spanish

2.1.2 Description of Change

1. Update the existing English and Spanish version of the MC 358 S in LRS/CalSAWS to match the C-IV MC 358 S (12/02) form.

   Form Header: Please refer to **Section 3.0 Supporting Document #1**

   Form Footer: Please refer to **Section 3.0 Supporting Document #1**

   Form Title: Medi-Cal Informing Notice, Intercounty Transfer-Sending County

   Form Number: MC 358 S

   Include NA Back 9: No

   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #1**

2. Update the MC 358 S form in Template Repository.
   a. Update the record in the Document Template table to end date the existing MC 358 S form in the different threshold languages and not make it available from Template Repository.

   b. The following parameters will be required:

      Required Form Input: Case Number, Customer Name, Program, Language and Receiving County. The 'Receiving County' dropdown will contain the list of all counties.

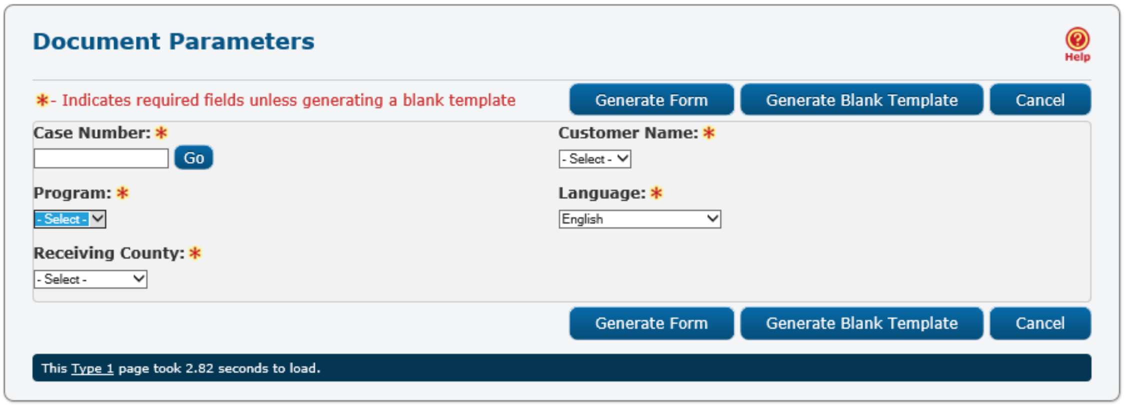

Figure 2.1.1 – Document Parameters Page

   c. The form will be available for all counties.

3. Update the automated batch process (PB19R1943) to not send out the MC 358 S form in the different threshold languages. There is no update to the existing trigger conditions for the batch job (this is only updating what is sent out, not when the form will be sent out).
   a. Update the record in the Codes Table (CT 942 - Batch Eligibility Sweep Codes) to turn off sending the MC 358 S in the different threshold languages.

4. Add the following population logic:

Header:

Section	Field	Description
MC 358 S – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.
MC 358 S – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY
MC 358 S – Page 1	**Case Name**	This field will be populated with the case name of the current case.
MC 358 S – Page 1	**Case Number**	This field will be populated with the case number of the current case.
MC 358 S – Page 1	**Worker Name**	This field will be populated with the name of the worker assigned to the program.
MC 358 S – Page 1	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.

Section	Field	Description
MC 358 S – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####
MC 358 S – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.
MC 358 S – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the Medi-Cal recipient.

Body:

Section	Field	Description
MC 358 S – Page 1	**Receiving County**	This field will be populated with the county selected on the 'Receiving County' dropdown. This field will be populated when generating the form from Template Repository and through batch. When generated from Template Repository, the field will be editable.

5. Add the following barcode options to the MC 358 S form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

6. Add the following print options for the MC 358 S form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Recipient selected from the Customer Name dropdown on the Document Parameter page or the Medi-Cal Program Primary Applicant when generated through batch.
Mailed From (Return): Medi-Cal Program Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard Mail Envelope
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: N/A
Clock Indicator: N
Post to YBN/C4Y: Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	MC 358 S Form Mockup	MC358 S_EN.pdf MC358 S_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities	The MC 358 S is added to LRS/CalSAWS and it is available in Template Repository or generated through batch for LA County.

	The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	(targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-211773 | DDID 1967

Migrate the CF 377.5 SAR (9/13)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/04/2020	1.0	Initial Revision	Rainier Dela Cruz
07/28/2020	1.1	Updates from Deliverable and Build comments.	Rainier Dela Cruz

Table of Contents

1 OVERVIEW

The purpose of this system change request is to migrate the C-IV CF 377.5 SAR (9/13) form to LRS/CalSAWS.

1.1 Current Design

LRS/CalSAWS currently has the modified version of the CF 377.5 SAR State form called the SAR 377.5 form. C-IV currently has the CF 377.5 form and matches the State version.

1.2 Requests

Migrate the C-IV CF 377.5 form to LRS/CalSAWS.

1.3 Overview of Recommendations

1. End date the SAR 377.5 form.
2. Create the CF 377.5 SAR (9/13) form.
3. Add the CF 377.5 SAR form to Template Repository.

1.4 Assumptions

1. The 'Worker Id' field on the form header is currently not translated for the threshold languages. The translation of the 'Worker Id' field will be implemented with **SCR CA- 217499**.

2 RECOMMENDATIONS

2.1 Migrate the CF 377.5 SAR

2.1.1 Overview

Add the CF 377.5 SAR form to LRS/CalSAWS Template Repository.

State Form: CF 377.5 SAR (9/13)

Programs: CalFresh

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog/Filipino, Vietnamese

**One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.*

2.1.2 Description of Change

1. Create the CF 377.5 SAR form. The form will have a cover sheet and a total of four impressions.

   Form Header: Please refer to **Section 3.0 Supporting Document #1**

   Form Footer: Please refer to **Section 3.0 Supporting Document #1**

   Form Title: CalFresh Mid-Certification Period Status Report

   Form Number: CF 377.5 SAR

   Include NA Back 9: No

   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #1**

2. Add the CF 377.5 SAR form to Template Repository.
   a. Update the record in the Document Template table to end date the SAR 377.5 form and make it unavailable from the Template Repository. Add a new record in the Document Template table for the CF 377.5 SAR and make it available from the Template Repository.
   b. The following parameters will be required:

      Required Form Input: Case Number, Customer Name, Program, Language

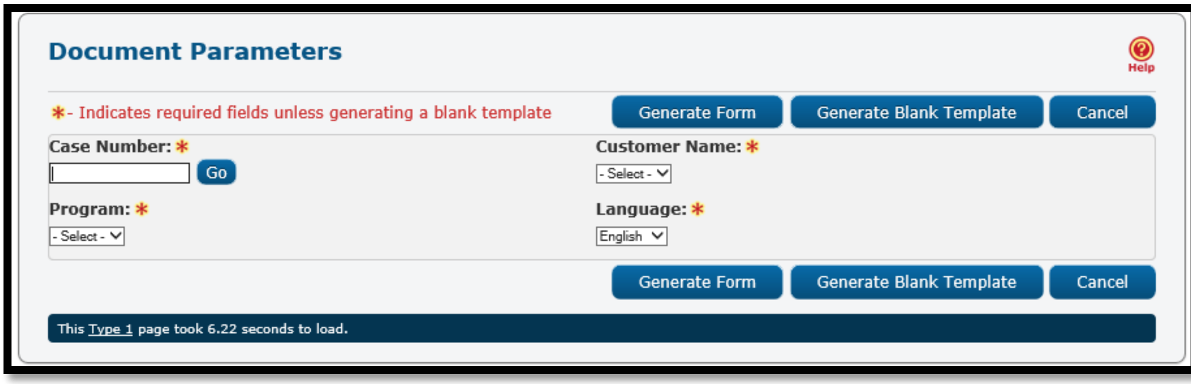

Figure 2.1.1 – Document Parameters Page

c. The form will be available to all counties.

3. Add the following population logic:

Header:

Section	Field	Description
CF 377.5 SAR – Page 1	**County Name**	This field will be populated with the county name based on the case number.
CF 377.5 SAR – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.
CF 377.5 SAR – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY
CF 377.5 SAR – Page 1	**Case Name**	This field will be populated with the case name of the current case.
CF 377.5 SAR – Page 1	**Case Number**	This field will be populated with the case number of the current case.
CF 377.5 SAR – Page 1	**Worker Name**	This field will be populated with the name of the worker assigned to the program.
CF 377.5 SAR – Page 1	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.
CF 377.5 SAR – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the

Section	Field	Description
		following format: (###) ###-####
CF 377.5 SAR – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.
CF 377.5 SAR – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the CalFresh recipient.

Body:

Section	Field	Description
CF 377.5 SAR – Page 3	**Recipient Mailing Address**	This field will be populated with the mailing address of the CalFresh recipient.
CF 377.5 SAR – Page 3	**Worker Name**	This field will be populated with the name of the worker assigned to the program.
CF 377.5 SAR – Page 3	**Work Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####

4. Add the following barcode options to the CSF 107 form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the following print options will for the CSF 107 form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:
Mail-To (Recipient): Recipient selected from the Customer Name dropdown on the Document Parameter page.

Mailed From (Return): CalFresh Program Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard Mail Envelope
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: N/A
Clock Indicator: N
Post to YBN/C4Y: Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CF 377.5 SAR Form Mockup	CF_377_5_SAR_EN.pdf CF_377_5_SAR_SP.pdf CF_377_5_SAR_AE.pdf CF_377_5_SAR_AR.pdf CF_377_5_SAR_CA.pdf CF_377_5_SAR_CN.pdf CF_377_5_SAR_FA.pdf CF_377_5_SAR_FI.pdf CF_377_5_SAR_HM.pdf CF_377_5_SAR_KO.pdf CF_377_5_SAR_LA.pdf CF_377_5_SAR_RU.pdf CF_377_5_SAR_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The CIV CF 377.5 SAR is migrated over to LRS/CalSAWS and it is available in Template Repository.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213164 | DDID 1967

eHIT updates for Conditional Medicare changes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rajan Vadapalli
	Reviewed By	Amy Gill, Max Volf, Geetha Ramalingam, Prashant Goel, Derek Goering

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/27/2020	.1	eHIT section added	Rajan Vadapalli
05/13/2020	.2	Edited eHIT criteria and updated current design	Renee Gustafson
05/27/2020	.3	Updated overviews and re-formatted	Renee Gustafson
07/08/2020	.4	Clarified 2.1.2.2.a.i and 2.1.2.2.b.ii to also include criteria for 'Part A Conditional Eligible' is blank or "No". Added assumption 2	Renee Gustafson

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1 OVERVIEW

This is a migration requirement to update the eHIT interface to not consider an individual as having Medicare when the individual has only conditional Medicare Part A.

1.1 Current Design

With CA-207207, two new fields are added to the LRS/CalSAWS Medicare Detail page to track conditional eligibility to Medicare Part A during the annual Medicare open enrollment period (January-March).

LRS/CalSAWS eHIT functionality sends 'Current or Offered Health Program' as "Medicare" in an Eligibility Determination Request (EDR) when an individual has a Medicare record effective for the EDR benefit month and the Medicare record has a selection in 'Part A Payment Method' or 'Part B Payment Method'.

LRS/CalSAWS eHIT functionality sends 'Current or Offered Health Program' as "None of the Above" in the EDR when no Medicare record exists or is effective for the individual in the EDR benefit month, and the only Health Coverage Type is 'All Other Health Coverage', and the Other Health Care Detail record is not for Employer Sponsored Insurance Outside Exchange, COBRA, or a Retiree Health Policy. When the 'Current or Offered Health Program' of "None of the Above" is sent in an EDR, the 'Free Medicare Part A' indicator is required and is sent as "No". If the 'Current or Offered Health Program' is anything other than "None of the Above", the 'Free Medicare Part A' indicator is not required and no value is sent for the indicator.

Note: The 'Free Medicare Part A' indicator is only required when sending 'Current or Offered Health Program' of "None of the above". LRS/CalSAWS never sends "Yes" for 'Free Medicare Part A' indicator because if a Medicare record exists for the EDR benefit month, the 'Current or Offered Health Program' is "Medicare" in the EDR.

LRS/CalSAWS eHIT functionality sends in the EDR the Medicare Admin Verification as "Yes" for an individual when a Medicare record has a selection in 'Part A Payment Method' or 'Part B Payment Method', the record is effective for the EDR benefit month and has "Verified" status; otherwise, the Medicare Admin Verification is sent as "No". There is no way to indicate in the EDR that the Medicare Admin Verification is pending to allow CalHEERS to attempt to electronically verify.

1.2 Requests

1. Update eHIT functionality to account for the new conditional Medicare Part A functionality introduced with CA-207207. Do not consider the individual as receiving Medicare for a MAGI Determination until the Medicare Part A is no longer conditional.
2. Update eHIT functionality to no longer default the Medicare Admin Verification to "No" when the Medicare record has a "Pending" verification status to allow CalHEERS to attempt an electronic verification of Medicare.
3. Update eHIT functionality to communicate if an individual has free Medicare Part A when they are receiving Medicare.

1.3 Overview of Recommendations

1. Update eHIT logic to communicate an individual as having Medicare and the Admin Verification for Medicare only when the individual no longer has conditional eligibility to Medicare Part A. Update eHIT logic to no longer default an Admin Verification = No for Medicare if the Medicare record is valid for the EDR benefit month and is pending Verification in LRS/CalSAWS.

1.4 Assumptions

1. This SCR will be implemented at the same time as CA-207207.
2. This SCR will be implemented after the eHIT Schema version 16, with CA-214445 | CIV-106700 in Release 20.09.

2 RECOMMENDATIONS

2.1 eHIT

2.1.1 Overview

Update eHIT logic to communicate an individual as having Medicare and the Admin Verification for Medicare only when the individual no longer has conditional eligibility to Medicare Part A. Update eHIT logic to no longer default an Admin Verification = No for Medicare if the Medicare record is valid for the EDR benefit month and is pending Verification in LRS/CalSAWS.

2.1.2 Description of Change

1. Update eHIT logic to communicate the Admin Verification for Medicare (SAWSAdministrativeVerifications = MED) in an EDR for an individual based on the below criteria:
    a. Send "Yes" when the verified Medicare record never had conditional Medicare Part A or no longer has conditional Medicare Part A.

       Send "Yes" if any of the following conditions are true:
        i. Medicare record is effective for the EDR benefit month with "Verified" verification status and 'Part A Conditional Eligible' is blank or "No" and 'Part A Effective Date' does not exist.
        ii. Medicare record is effective for the EDR benefit month with "Verified" verification status and EDR benefit month is on or after 'Part A Effective Date'.
    b. Do not send a Medicare Admin Verification when the Medicare record has a "Pending" verification status and the Medicare Part A was not indicated as conditional or is after the conditional Medicare Part A period.

       Do not send if any of the following conditions are true:
        i. Medicare record is effective for the EDR benefit month with "Pending" verification status and the EDR benefit month is on or after 'Part A Effective Date'.
        ii. Medicare record is effective for the EDR benefit month with "Pending" verification status and 'Part A Conditional Eligible' is blank or "No" and 'Part A Effective Date' does not exist.
    c. Otherwise, send "No".

2. Update eHIT logic to send that the individual is attesting to receiving Medicare in an EDR when the Medicare Part A was not indicated as conditional or is after the conditional Medicare Part A period.

   Send 'Current or Offered Health Program' as "Medicare" (HaveOrOfferedOtherHealthProg = MC) based on the below criteria:
   a. Medicare record is effective for the EDR benefit month and Medicare record has a selection in 'Part A Payment Method' or 'Part B Payment Method' and 'Part A Effective Date' does not exist.
   b. Medicare record is effective for the EDR benefit month and Medicare record has a selection in 'Part A Payment Method' or 'Part B Payment Method' and the EDR benefit month is on or after the 'Part A Effective Date'.

3. Update eHIT logic to send that an individual with 'Current or Offered Health Program' as "Medicare" has free Medicare Part A in an EDR when the individual is attesting to 'Part A Payment Method' as "Free" and the Medicare Part A was not indicated as conditional or is after the conditional Medicare Part A period. Otherwise, send that the individual does not have free Medicare Part A.

   a. Send 'Free Medicare Part A' as "Yes" (FreeMedicarePartAInd=Y) when any of the following conditions are true:
      i. Medicare record is effective for the EDR benefit month and 'Part A Payment Method' selection in the Medicare record is "Free" and 'Part A Effective Date' does not exist.
      ii. Medicare record is effective for the EDR benefit month and 'Part A Payment Method' selection in the Medicare record is "Free" and EDR benefit month is on or after 'Part A Effective Date'.
   b. Otherwise, send 'Free Medicare Part A' as "No" (FreeMedicarePartAInd=N)

   Technical Note: The current functionality for an individual attesting to some other health care (the EDR includes 'Current or Offered Health Program' as "None of the Above") the 'Free Medicare Part A' will be sent as "No" (FreeMedicarePartAInd=N). There is no change to this functionality.

2.1.3 Interface partner

CalHEERS

2.1.4 eHIT Schema Version

The eHIT Schema is version 16, last updated with CA-214445 | CIV-106700 in Release 20.09.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Updated eHIT logic for Medicare to address changes made with CA-207207.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213493 | DDID 1052, 1092, 1094, 1095, 1096

Updates to Fiscal Authorization

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu
	Reviewed By	S. Garg, J. Chavata, K. Santosh, N. Barsagade, J. Besa, E. Chu, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/18/2020	1.0	Initial Draft	Eric Wu
07/28/2020	1.1	Update based on QA team's comments	Eric Wu
08/04/2020	1.2	Update to maintain 3rd Level Authorization functionality for L.A. county. Also changes column names based on Build team requested	Eric Wu
08/06/2020	1.3	Update Column Name based on DBCR	Eric Wu

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1 OVERVIEW

1.1 Current Design

Payments/Valuables are distributed to customers according to their needs established through the system. Payment/Valuable requests are required to be reviewed by workers, 1st Level Approver ('Supervisor' in Los Angeles County), and/or 2nd Level Approver ('Deputy' in Los Angeles County) before benefits are issued to customers. Based on customers' need types, requests can go through one of the following Authorization processes:

1. Worker authorization only
2. Worker and 1st Level authorization.
3. Worker, 1st Level authorization, and 2nd Level Authorization.

Approvers utilize the Pending Authorizations page to review payment/valuable requests that are pending approval.

Currently, there are no functionalities in the system that allow counties to manage the authorization process of Payment/Valuable requests.

1.2 Requests

1. Update Supervisor Authorization types of Payment/Valuable requests to be configurable by each county.

1.3 Overview of Recommendations

1. Update County Authorizations page to allow users to manage authorizations of Payment/Valuable requests by programs.
2. Add Payment/Valuable Request Authorization and Payment/Valuable Request Authorization Detail pages to allow specified county admin users to configure authorizations for each program.
3. Default values for Los Angeles County to maintain their current authorization process and for the 57 Migration counties to have 1st Level Authorization.

1.4 Assumptions

1. The relationship of programs, customer need categories, and customer need types will continue to be managed with Category 1870.
2. This SCR does not affect the functionality of allowing the same worker to create and approve a Payment Request. For counties that opt in to 'Same User Payment Request Approval', the user who creates a payment request can also approve it.
3. Existing supervisor authorization task generation will remain unchanged.
4. This new logic will be applied to ongoing Payment/Valuable Requests only.
5. General Assistance (Managed) will not be available when this SCR is implemented for 20.11. A DCR will be included to default GM to 1st Level Authorization in SCR 'CA-201377 DDCR 10002: GA/GR Solution for C-IV Counties' for 21.01'.

6. CalWIN's General Assistance/ General Relief will be excluded from this SCR as it is not currently in the LRS/CalSAWS. A DCR will be included to default the program to 1st Level Authorization in SCR 'CA-215687 DDID 2686 FDS: GA GR Phase 1 - Case Summary and Application page Changes'.
7. Audit Trail functionality will be implemented with SCR CA-217634.
8. For 57 Migration Counties, the default authorization will be 1st level authorization as this is a required level for Payment/Valuable Requests. Counties that wish to have the same worker create and authorize the request can add the relevant security rights to the user's profile to do so.

2 RECOMMENDATIONS

2.1 County Authorizations

2.1.1 Overview

The County Authorizations page is used to configure supervisor authorizations as appropriate for each county.

Add a new section under Fiscal for each county to configure the authorization levels for Payment/Valuable Requests.

2.1.2 County Authorizations – Fiscal Mockup

Fiscal	
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	2nd Level Authorization
Issuance Replacement	2nd Level Authorization
Transaction Refund	2nd Level Authorization

Fiscal - Payment/Valuable Request
Cal-Learn
CalWORKs
CFET
Diversion
Foster Care
General Assistance/General Relief
GROW
Homeless - Perm
Homeless - Temp
Kin-GAP
RCA
REP
Welfare to Work

Edit

Figure 2.1.1 – Fiscal – Payment/Valuable Request in View Mode for Los Angeles County

Fiscal - Payment/Valuable Request
Cal-Learn
CalWORKs
CFET
Diversion
Foster Care
General Assistance/General Relief
GROW
Homeless - Perm
Homeless - Temp
Kin-GAP
RCA
REP
Welfare to Work

Figure 2.1.2 – Fiscal – Payment/Valuable Request on County Authorizations page in Edit Mode for Los Angeles County

2.1.3 Description of Changes

1. Add a new 'Fiscal – Payment/Valuable Request' section under 'Fiscal'. This section will display all programs available for service arrangements for each county. Each program will be a hyperlink which navigates users to the Payment/Valuable Request Authorization List page (section 2.2) in View Mode and will be text only in Edit Mode.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Authorizations**

2.1.5 Security Updates

No changes

2.1.6 Page Mapping

Fiscal – Payment/Valuable Request: 18 – Programs for counties to configure supervisor authorizations of Payment Requests and Valuable Requests.

2.1.7 Page Usage/Data Volume Impacts

None

2.2 Payment/Valuable Request Authorization List – [Program]

2.2.1 Overview

This new page will allow county users with the appropriate security to view and configure the level of authorization required for Payment/Valuable Requests of a program.

2.2.2 Payment/Valuable Request Authorization List Mockup

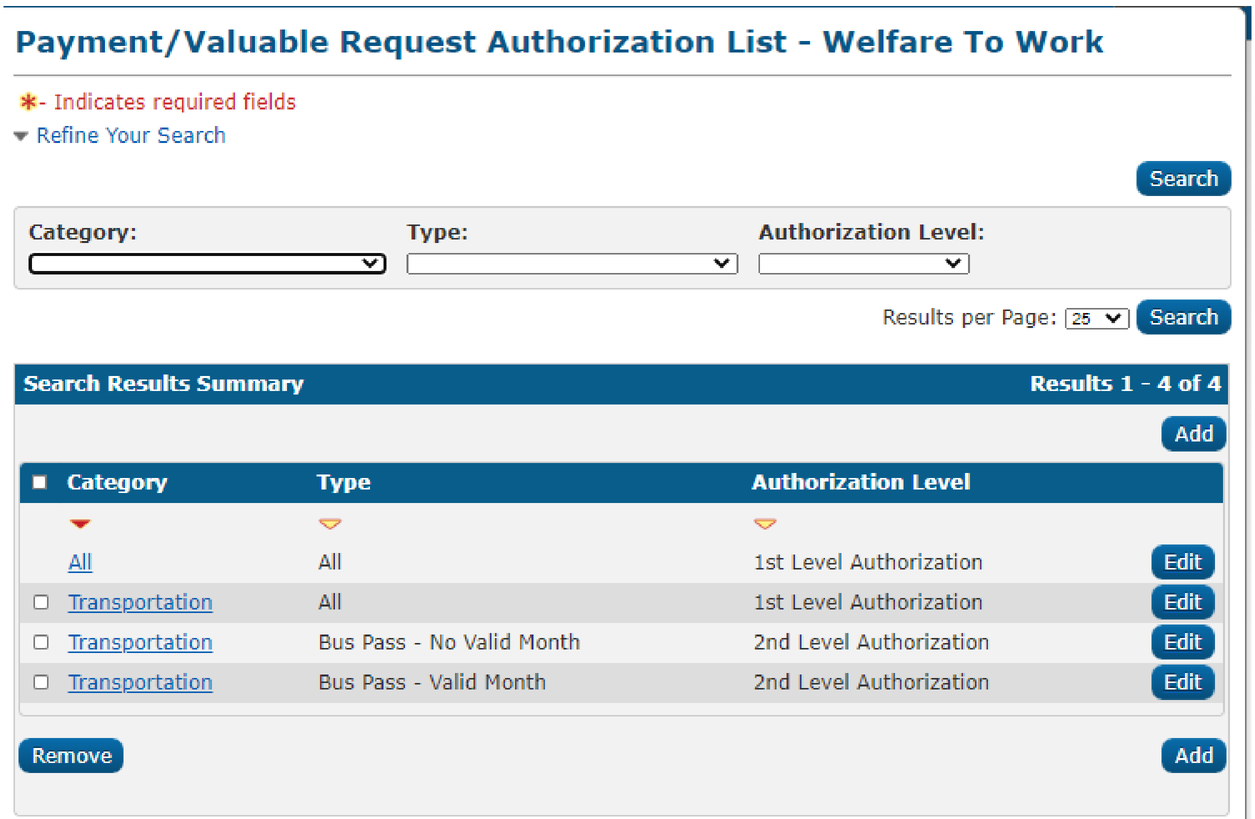


Figure 2.2.1 – Payment/Valuable Request Authorization List

2.2.3 Description of Changes

1. Add a new Payment/Valuable Request Authorization List page – see figure 2.2.1. Users with 'CountyAuthorizationView' security right can navigate to this page from County Authorizations (section 2.1).
    a. The header format will be 'Payment/Valuable Request Authorization List – [Program]'.
    b. A 'Refine Your Search' section will allow users to filter the results by clicking the 'Search' button.
        i. Category – A dropdown field will contain an 'All' option and Need Categories available for the program. The default value is blank.

ii. Type – A dropdown field will contain an 'All' option and Need Types available for the program. The default value is blank.
iii. Authorization Level – A dropdown field will have 1st Level and 2nd Level Authorizations as selectable options. The default value is blank.
iv. Results per Page – A dropdown field to set how many records to display per page after clicking 'Search' button. Options are 25, 50, 75, and 100. The default value is 25.

c. A 'Search Results Summary' section with paginations and following fields:
   i. Check Box – This field will allow users to remove a Payment/Valuable Request Authorization Detail record. It will be visible for users with 'CountyAuthorizationEdit' security right. This check box will not be visible for authorization detail on the program level.
   Note: Program Level Authorization Detail, which has Category 'All' and Type 'All', of existing programs will be created by the DCR in section 2.4. When implementing a new Program in future, it is recommended to set the program level authorization with a DCR.
   ii. Category – The field will indicate the need category of a Payment/Valuable Request Authorization Detail record. It will be a hyperlink and navigate users to Payment/Valuable Request Authorization Detail in View Mode (section 2.3).
   iii. Type – The field will indicate the need type of a Payment/Valuable Request Authorization Detail record
   iv. Authorization Level – The field will indicate the authorization setting for specified Category and Type.
   v. Edit - This button will be visible for users with 'CountyAuthorizationEdit' security right and navigate users to Payment/Valuable Request Authorization Detail in Edit Mode (section 2.3).
   vi. Search results will be paginated.
   vii. All columns are sortable.
   viii. The default sort will be Category, and the order will begin with Category 'All' and is followed by the rest in alphabetical order. Within the same categories, the order will begin with Type 'All' and is followed by the rest types in alphabetical order.

d. Remove - This button will allow users to delete Payment/Valuable Request Authorization record. This button will be visible when following conditions are met:
   i. There are any Payment/Valuable Request Authorization Details with a checkbox in the search results section.
   ii. Users have 'CountyAuthorizationEdit' security right.

e. Add - This button navigates users to the Payment/Valuable Request Authorization Detail in Create Mode (section 2.3), and will be visible when the following conditions are met:
   i. There are Customer Needs and Types set up for the program.
   ii. Users have 'CountyAuthorizationEdit' security right.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Authorizations**

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyAuthorizationView	View County Authorizations.	County Authorization View County Authorization Edit
CountyAuthorizationEdit	Edit County Authorizations.	County Authorization Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Authorization View	Gives the User the ability to view County Authorizations.	County Discretion
County Authorization Edit	Gives the User the ability to edit County Authorizations.	County Discretion

2.2.6 Page Mapping

Add page mapping for the Payment/Valuable Request Authorization List page.

2.2.7 Page Usage/Data Volume Impacts

None.

2.3 Payment/Valuable Request Authorization Detail – [Program]

2.3.1 Overview

The new page will allow county users with the appropriate security to view and configure authorization levels for the specific program, need category, and need type. Also, users can set conditions/requirements for 2nd Level Authorization.

History of the changes to Payment/Valuable Request Authorization Detail will not be tracked.

2.3.2 Payment/Valuable Request Authorization Detail Mockup

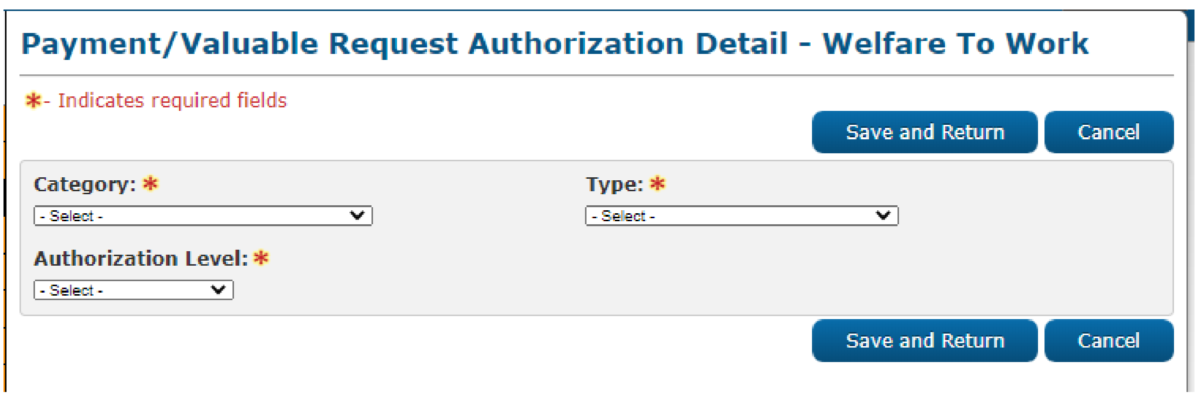


Figure 2.3.1 – Create Mode

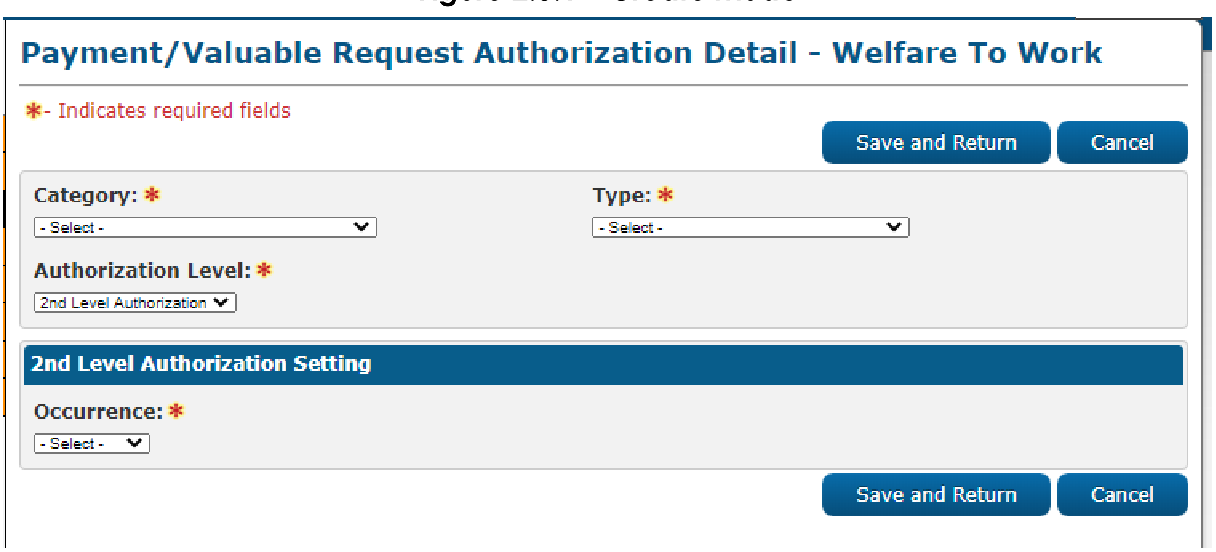


Figure 2.3.2 – Create Mode with 2nd Level Authorization

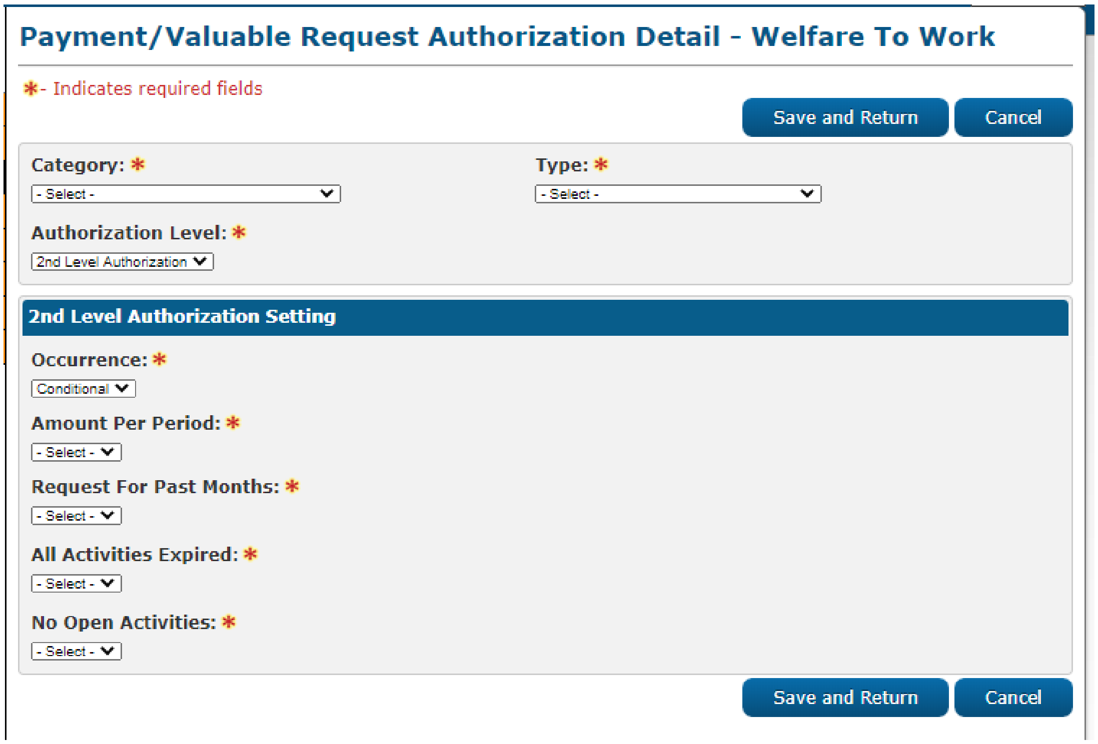


Figure 2.3.3 – Create Mode with Conditional 2nd Level Authorization

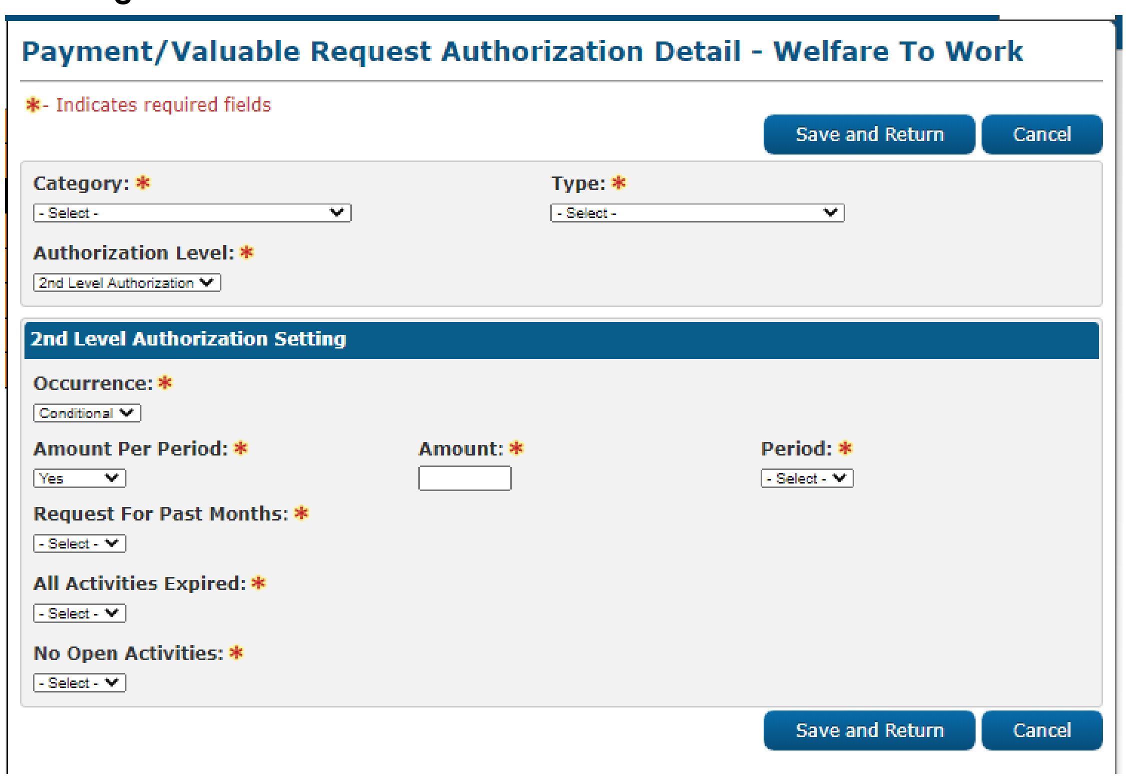


Figure 2.3.4 – Create Mode with Conditional 2nd Level Authorization and Amount Per Period

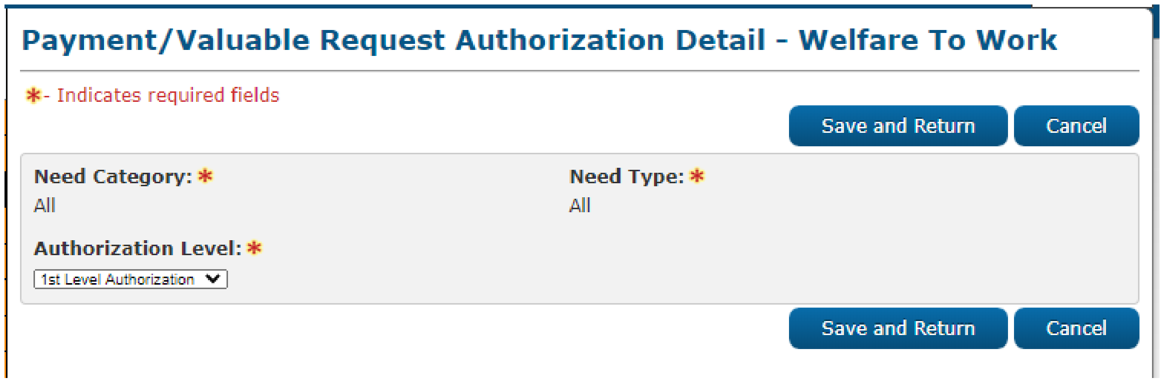


Figure 2.3.5 – Edit Mode with Non 2nd Level Authorization

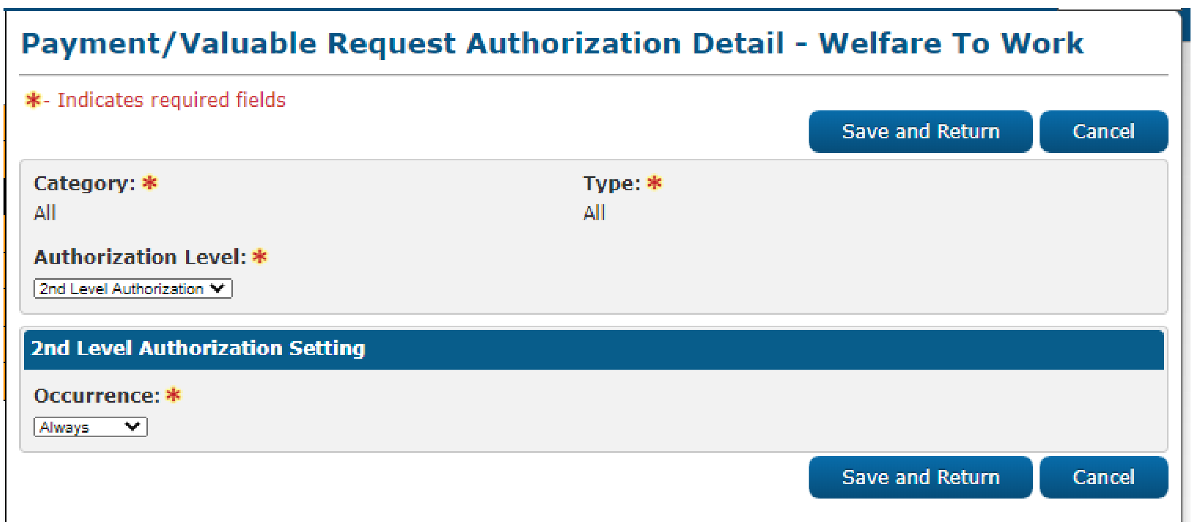


Figure 2.3.6 – Edit Mode with Always 2nd Level Authorization

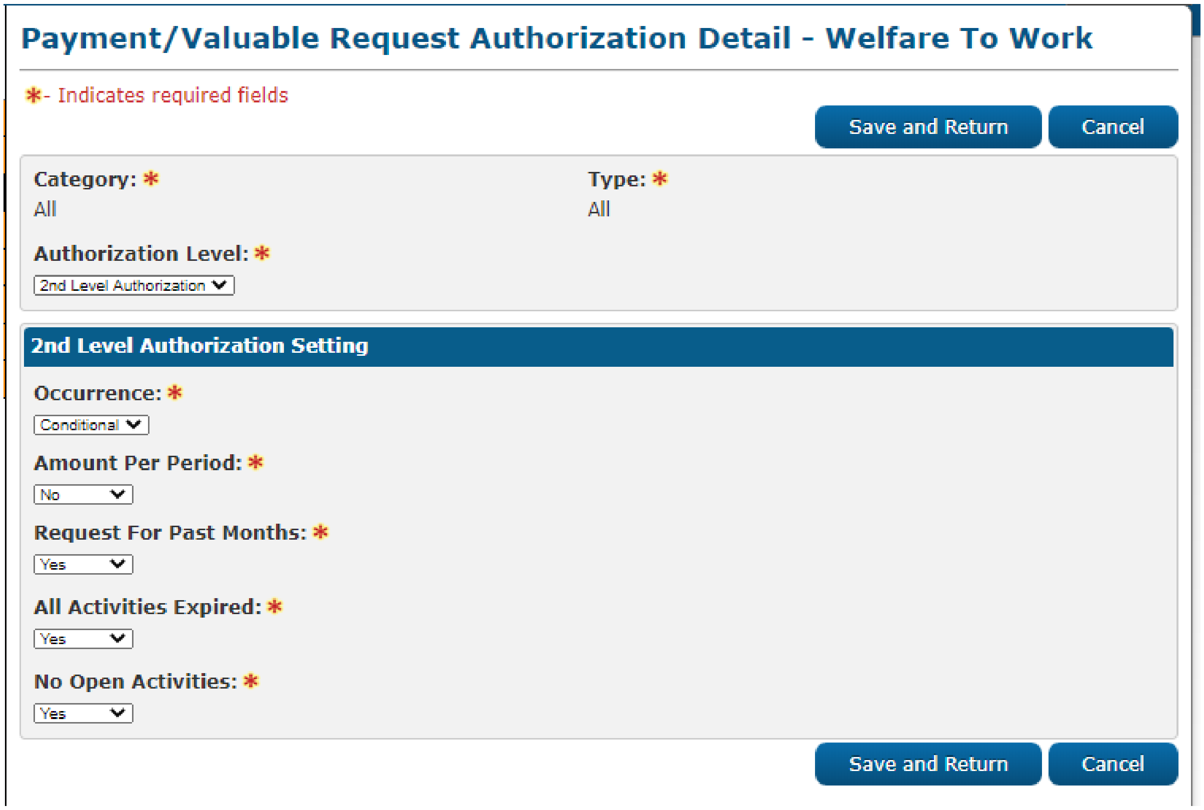


Figure 2.3.7 – Edit Mode with Conditional 2nd Level Authorization

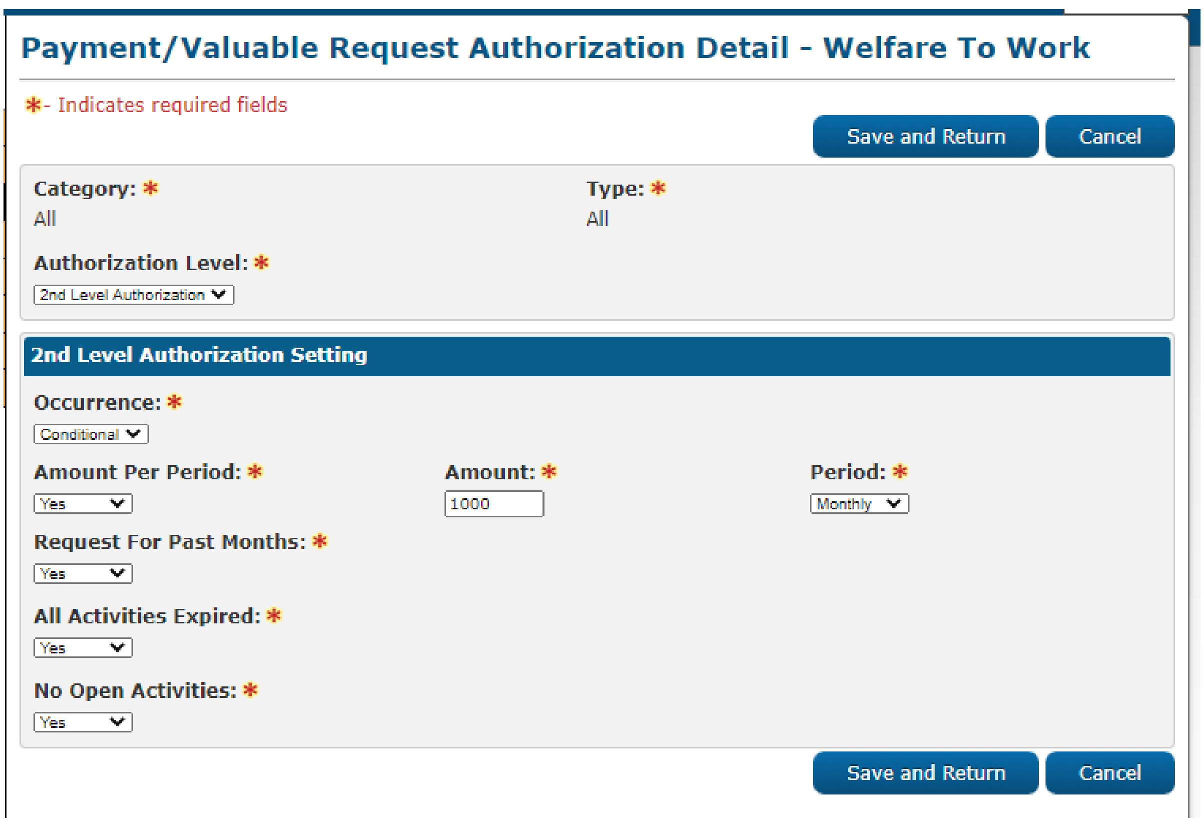


Figure 2.3.8– Edit Mode with Conditional 2nd Level Authorization and Amount Per Period

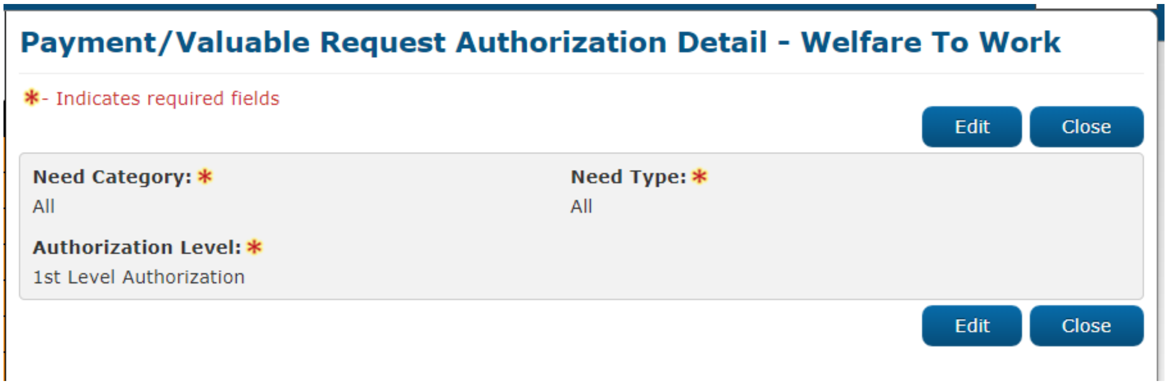


Figure 2.3.9 – View Mode with Non 2nd Level Authorization

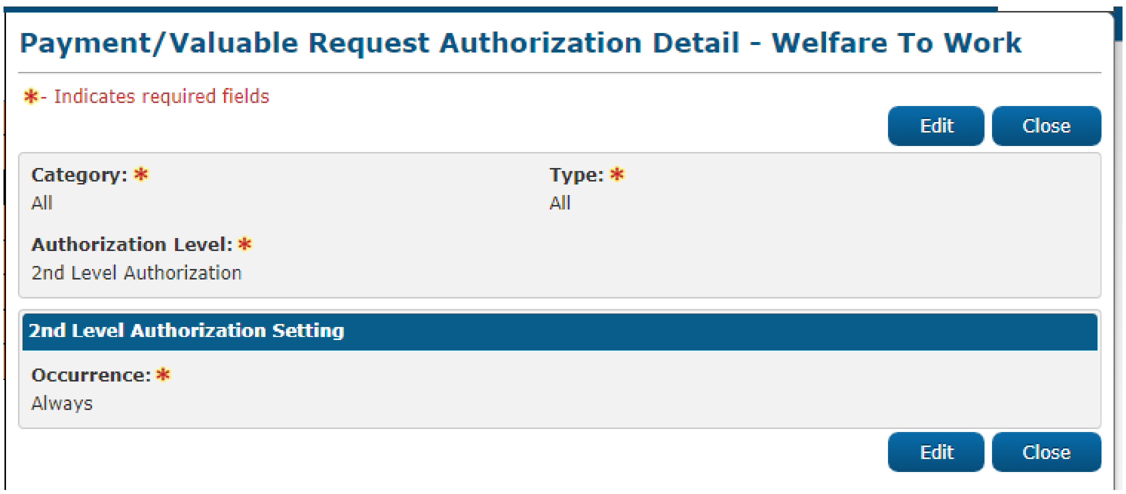
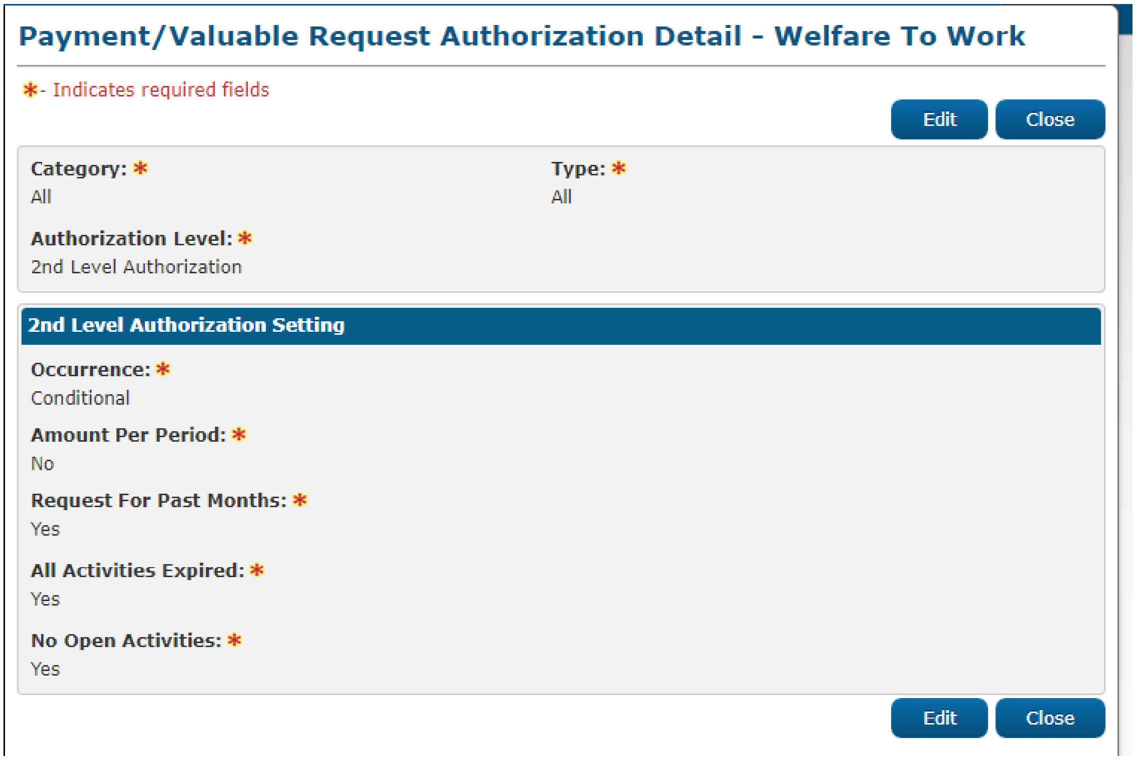


Figure 2.3.10 – View Mode with Always 2nd Level Authorization



Payment/Valuable Request Authorization Detail - Welfare To Work

*- Indicates required fields

Edit Close

Category: * All

Type: * All

Authorization Level: * 2nd Level Authorization

2nd Level Authorization Setting

Occurrence: * Conditional

Amount Per Period: * No

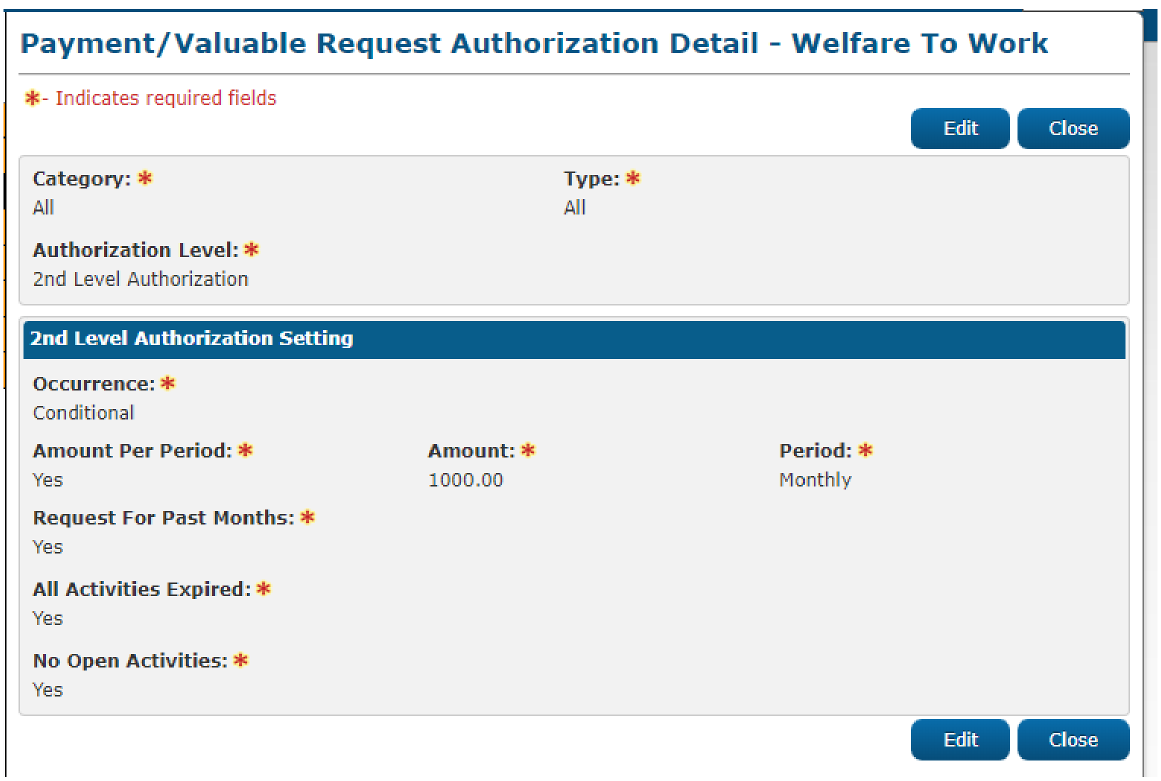
Request For Past Months: * Yes

All Activities Expired: * Yes

No Open Activities: * Yes

Edit Close

Figure 2.3.11 – View Mode with Conditional 2nd Level Authorization



Payment/Valuable Request Authorization Detail - Welfare To Work

*- Indicates required fields

Edit Close

Category: * All

Type: * All

Authorization Level: * 2nd Level Authorization

2nd Level Authorization Setting

Occurrence: * Conditional

Amount Per Period: * Yes

Amount: * 1000.00

Period: * Monthly

Request For Past Months: * Yes

All Activities Expired: * Yes

No Open Activities: * Yes

Edit Close

Figure 2.3.12 – View Mode with Conditional 2nd Level Authorization and Amount Per Period

2.3.3 Description of Changes

1. Add a new Payment/Valuable Request Authorization Detail page. Users with 'CountyAuthorizationEdit' or 'CountyAuthorizationView' security right can navigate to this page from Payment/Valuable Request Authorization List (section 2.2).
    a. The header format will be 'Payment/Valuable Request Authorization Detail – [Program]'. See figures 2.3.1.
    b. The page will have following fields:
        i. Category – This field will only be editable and mandatory in Create Mode. The dropdown will contain an 'All' option and need categories available for a program. The default value is '– Select –'.
        ii. Type – This field will only be editable and mandatory in Create Mode. The dropdown will contain an 'All' option and need types available for the selected need category. If no Category is selected, the dropdown will have no options. If Category is 'All', then 'All' is the only selectable option and the default value. Otherwise the default value is '– Select –'. Please see 'ProgramCategoryTypeMapping.xlsx' for option mapping.
        When this field is set to 'All', the authorization setting will be applied to all types of the specified Category unless the type has its own Authorization Level defined.
        For example, Authorization List for Welfare To Work below:

Category	Type	Authorization Level
Transportation	All	1st Level Authorization
Transportation	Bus Pass – No Valid Month	2nd Level Authorization

        A Payment Request with 'Transportation' Category and 'Auto Repair' Type will only require 1st Level Authorization. However, a Payment Request with 'Transportation' Category and 'Bus Pass – No Valid Month' will require 2nd Level Authorization.
        iii. Authorization Level – This field is editable and mandatory in both Create and Edit Mode. Selectable options are below:
            - – Select –
            - 1st Level Authorization
            - 2nd Level Authorization

        The default value is '– Select –' in Create Mode and last saved data in Edit Mode.
    c. Add a '2nd Level Authorization Setting' section to allow users to customize 2nd Level authorization process. This section will only be visible if 2nd Level Authorization is chosen.

iv. Occurrence – This field will indicate when the 2nd Level Authorization will happen. It will be mandatory and editable in both Create and Edit Mode. Possible options are below:
    - – Select –
    - Always
    - Conditional

    The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

Below fields will only be visible and mandatory when Occurrence is 'Conditional':

i. Amount Per Period – This field will indicate that 2nd Level Authorization is required for certain amounts of payments. The possible options are:
    - - Select –
    - Yes
    - No

    The default value will be '– Select –' in Create Mode and last saved data in Edit Mode

ii. Amount – The minimum amount that will require 2nd Level Authorization. This field is only visible when 'Amount Per Period' field is Yes and becomes mandatory.
    Add validation 'Please enter a positive amount in xx,xxx,xxx.xx format.' and prevent data from being saved.

iii. Period – This field will indicate the time frame of the minimum amount. Possible options are below:
    - – Select –
    - None
    - Monthly
    - Quarterly
    - Yearly
    - Biennial (Every Two years)
    - Lifetime

    This field is only visible and becomes mandatory when 'Amount Per Period' is Yes. The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.
    Note:
    When Period is 'None', the benefit amount of each Payment/Valuable Request will be checked against the value of the Amount field. For example, if Amount field is set to $100.00 and Period field is set to 'None', every Payment/Valuable Request with $100.00 of benefits or more will require 2nd Level Authorization, and a request with $99.99 of benefits or less will require only 1st Level Authorization.

Other Periods indicate that the value of the Amount field should be applied over a specified time frame. A combination of Period ‘Yearly’ and Amount $100.00 means that when the total benefits of all Payment or Valuable Requests that a customer received for the specific need under the program within a year exceed $100, it will require 2nd Level Authorization. The total benefits will include Payment/Valuable Requests with New, Pending Approval, and Approved status.

iv. Request For Past Months – This field will indicate whether 2nd Level Authorization is required when payments are requested for the past months. The possible options are:
    - - Select –
    - Yes
    - No

    The default value will be ‘– Select –‘ in Create Mode and last saved data in Edit Mode.

v. All Activities Expired – This field will indicate whether 2nd Level Authorization is required when all activities are expired. The possible options are:
    - - Select –
    - Yes
    - No

    The default value will be ‘– Select –‘ in Create Mode and last saved data in Edit Mode.

vi. No Open Activities - This field will indicate whether 2nd Level Authorization is required when there are no open activities. The possible options are:
    - - Select –
    - Yes
    - No

    The default value will be ‘– Select –‘ in Create Mode and last saved data in Edit Mode.

d. Edit – This button will change the page to Edit mode. This button is only available in View mode. The security right of ‘CountyAuthorizationEdit’ is required to view this button.
e. Close – This button will be only available in View mode and navigate users to Payment/Valuable Request Authorization List page.
f. Cancel – This button is only available in Edit mode. This button will not save any changes made by users and navigate them to the page from where Edit Mode is accessed.
g. Save and Return – This button is only available in Edit mode. This button is used to save the changes made by users to the page and navigate them back to the Payment/Valuable Request Authorizations List.
h. Add a validation ‘Combination of Category and Type already exists.’ and stop data from being saved.

i. Add a validation 'At least one of the conditions must be 'Yes' When 2nd Level Authorization is Conditional.' and stop data from being saved.

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Authorizations**

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyAuthorizationView	View County Authorizations.	County Authorization View County Authorization Edit
CountyAuthorizationEdit	Edit County Authorizations.	County Authorization Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Authorization View	Gives the User the ability to view County Authorizations.	County Discretion
County Authorization Edit	Gives the User the ability to edit County Authorizations.	County Discretion

2.3.6 Page Mapping

Add page mapping for the Payment/Valuable Authorization Detail page.

2.3.7 Page Usage/Data Volume Impacts

None

2.4 Update Payment/Valuable Request Authorizations Logic

2.4.1 Overview

Update Payment Request Detail and Valuable Request Detail pages to use the new Payment/Valuable Request Authorization List to determine supervisor authorizations.

2.4.2 Description of Changes

1. Update Authorization logic on Payment Request Detail and Valuable Request Detail to determine supervisor authorizations based on the county specific settings on Payment/Valuable Request Authorization List page.
2. For L.A. County only, maintain 3rd Level Authorization, also known as second deputy approval, in backend logic. Payment/Valuable Requests require 3rd Level Authorization when all following conditions are met:
    a. The request is for the Welfare to Work benefits.
    b. The request is for the Ancillary Work-Related Need Category.
    c. The customer has a CalWORKs program that is not active under the same case.

    Note: 3rd Level Authorization will not be available in Payment/Valuable Request Authorization Detail (section 2.3), and any change will require a SCR.

2.4.3 Program Impacted

All Supportive Service Programs

2.4.4 Performance Impacts

None

2.5 Data Change to Default Payment/Valuable Request Authorization Logic

2.5.1 Overview

Default authorization to the following values for Los Angeles County to maintain existing functionality, and for 57 migration counties to 1st Level Authorization.

2.5.2 Description of Change

1. Perform a data change as file 'All Counties Auth Level.xlsx' to default the for authorization for all counties.

2. Perform additional data change as file ‘Los Angeles County Auth Level.xlsx’ for Los Angeles County to maintain existing authorization level functionalities.

2.5.3 Estimated Number of Records Impacted/Performance

Approximately 150 records.

2.6 CTCR

1. Insert a new record with below attributes in Category table:
   CATGRY_NAME: County Fiscal Authorization Type
   REFER_TABLE_IND: N
2. Insert new records in Code_Detl table as below:

CODE_NUM _IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	LONG_DECODE_NAME	BEG_DATE	END_DATE
FI	(ID of County Fiscal Authorization Type)	Fiscal Authorization	Fiscal Authorization	1/1/1000	12/31/9999
ED	(ID of County Fiscal Authorization Type)	EDBC Threshold	EDBC Threshold	1/1/1000	12/31/9999
SU	(ID of County Fiscal Authorization Type)	Supportive Service Threshold	Supportive Service Threshold	1/1/1000	12/31/9999

3. Insert a new record with below attributes in Category table:
   CATGRY_NAME: Payment/Valuable Request Period
   REFER_TABLE_IND: N
4. Insert new records in Code_Detl table as below:

CODE_NUM _IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	LONG_DECODE_NAME	BEG_DATE	END_DATE
NO	(ID of payment/valuable request period)	None	None	1/1/1000	12/31/9999
MO	(ID of payment/valuable request period)	Monthly	Monthly	1/1/1000	12/31/9999
QU	(ID of payment/valuable request period)	Quarterly	Quarterly	1/1/1000	12/31/9999
YE	(ID of payment/valuable request period)	Yearly	Yearly	1/1/1000	12/31/9999
BI	(ID of payment/valuable request period)	Biennially	Biennially	1/1/1000	12/31/9999
LI	(ID of payment/valuable request period)	Lifetime	Lifetime	1/1/1000	12/31/9999

2.7 Database Change Request

1. Create a new table 'COUNTY_FISCAL_AUTH' with the following columns:
   a. ID – This column will store system-generated unique identifier for each instance of this table.
      a. This column will not allow a null value.
      b. Data type will be number.

        c. Comment will be 'This is a System-generated unique identifier for an instance of this table to be used as the primary key'.

b. COUNTY_CODE – This column will identify the county for which a record is created.
    i. This column will not allow null value.
    ii. Data type will be VARCHAR2(3 Byte).
    iii. Comment will be '15 - This column will contain the county for which a record is created.'

c. PGM_CODE – This column will store the program code for a record.
    a. This column will allow null value.
    b. Data type will be VARCHAR2(3 Byte).
    c. Comment will be '18 - The program code associated with a record'.

d. NEED_CAT_CODE – This column will store the Customer Need Category code.
    a. This column will allow null value.
    b. Data type will be VARCHAR2(3 Byte).
    c. Comment will be '163 - The Customer Need Category code.'

e. NEED_TYPE_CODE – This column will store the Customer Need Type code.
    a. This column will allow null value.
    b. Data type will be VARCHAR2(3 Byte).
    c. Comment will be '164 - The Customer Need Type code.'

f. COUNTY_AUTH_CODE – This column will indicate the authorization level of specified program, category, and type for a county.
    a. This column will allow null value.
    b. Data type will be VARCHAR2(3 Byte).
    c. Comment will be '10586 - This column will indicate the authorization level of specified program, category, and type for a county'

g. TYPE_CODE – This column will indicate a record is whether used for Fiscal Authorization or Issuance Threshold.
    a. This column will not allow null value.
    b. Data type will be VARCHAR2 (3 Byte).
    c. Comment will be '[new ID of Time Track Type in section 2.5.1] – This column will indicate a record is whether used for Fiscal Authorization or Issuance Threshold.'

h. AMT – This field will store the dollar amount of issuance threshold or minimum amount of authorization.
    a. This column will allow null value.
    b. Data type will be Number (10,2).
    c. Comment will be 'This field will store the dollar amount of issuance threshold or minimum amount of authorization'.

i. PERIOD_CODE – This field will store the period to which the amount is applied.
    a. This column will allow null value.

b. Data type will be VARCHAR2 (3 Byte).
c. Comment will be 'This field will store the period to which the amount is applied'.

j. PRIOR_MO_IND – This field will determine whether 2nd Level Authorization is required when requests are for past month.
   a. This column will allow null value.
   b. Data type will be VARCHAR2 (1 Byte).
   c. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when payment/valuable requests are for past month.'
k. OPEN_ACTIV_IND – This field will determine whether 2nd Level Authorization is required when there are no open activities.
   a. This column will allow null value.
   b. Data type will be VARCHAR2 (1 Byte).
   c. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when there are no open activities.'
l. EXPIRE_ACTIV_IND – This field will determine whether 2nd Level Authorization is required when all activities expired.
   a. This column will allow null value.
   b. Data type will be VARCHAR2 (1 Byte).
   c. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when all activities are expired.'
m. CREATED_BY – This column will identify the person who creates an instance on this table.
   a. This column will not allow null value.
   b. Data type will be VARCHAR2(30 Byte).
   c. Comment will be ''This column captures the name of the person who created a specific instance on this table.'
n. UPDATED_BY – This column will identify the last person who updates an instance on this table.
   a. This column will not allow null value.
   b. Data type will be VARCHAR2(30 Byte).
   c. Comment will be 'This column captures the name of the person who last updated a specific instance on this table'
o. CREATED_ON – This column will store the date/time when an instance of this table is created.
   a. This column will not allow null value.
   b. Data type will be TIMESTAMP (6).
   c. Comment will be 'this column captures the date/time when a specific instance of this table was created.'
p. UPDATED_ON – This column will store the date/time when an instance of this table is last updated.
   a. This column will not allow null value.
   b. Data type will be TIMESTAMP (6).

c. Comment will be ‘This column captures the date/time when a specific instance of this table was last updated’.

Table comment will be ‘This Table stores counties’ authorization information for payment/valuable requests.’

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Testing	Mapping of programs, customer categories, and customer needs	ProgramCategoryTypeMapping.xlxs
2	DCR	Default Authorization Level for all counties.	All Counties Auth Level.xlsx
3	DCR	Additional Authorization set up for Los Angeles County	Los Angeles County Auth Level.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1052, 1092, 1094, 1095, 1096	Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements: 1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092) 2) The CONTRACTOR shall create a rejection reason dropdown along with a non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094) 3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095) 4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052) 5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)	Supervisor Authorization functionality will be turned "Off" at go-live for the 57 C-IV and CalWIN counties and will remain enabled for LA County. The 57 Counties will begin using Supervisor Authorization post go-live as determined by their County leadership. (#1052) Configurability of the Supervisor Authorization functionality will only entail the ability for a County to configure by: on/off, percentage of authorization required by position and by threshold values. It will not entail the	Add new pages to configure authorizations by county for Payment and Valuable Requests.

		creation of additional data points/inputs for configurability. (#1052) The supervisor authorization types in the CalSAWS will be configured so that each county can elect to turn on or off an authorization type that has been pre-defined in the system along with the percentage of authorization required by position and/or the threshold. (#1092)	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213659 | DDID 1787, DDID 1789

Migrate C-IV County Specific Batch Jobs

Phase 4

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/7/2020	1.0	Initial Draft	Avi Bandaranayake
7/20/2020	1.1	Updates based on QA comments	Avi Bandaranayake

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1 OVERVIEW

There are currently 5,158 C-IV batch jobs identified as needing to be evaluated for migration into CalSAWS. This DDID is Phase 4 of a multi-phase effort to evaluate active C-IV batch jobs for migration into CalSAWS. The batch jobs identified by this DDID cover a variety of functional areas.

1.1 Current Design

The jobs identified in Supporting Document 1 are batch jobs that currently exist only in the C-IV system also known as C-IV Jobs.

The jobs identified in Supporting Document 2 are batch jobs that exist in both C-IV and CalSAWS also known as Common Jobs.

1.2 Requests

Per DDID 1787, migrate the C-IV County Specific Batch Jobs into CalSAWS.

Per DDID 1789, update the Batch scheduler with new jobs created for 58 counties.

1.3 Overview of Recommendations

1. Identify batch jobs that are currently active in the C-IV system that do not exist in CalSAWS.
2. Identify batch jobs that are currently active in both the C-IV and CalSAWS systems.
3. Port over C-IV code and batch jobs identified in Supporting Document 1.
4. Verify configuration and batch properties for jobs listed in Supporting Document 2.
5. Update all non-county specific batch jobs in LRS/CalSAWS to run for all 58 counties.

1.4 Assumptions

1. Scheduling of any migrated batch jobs will be handled by DDID 1789.
2. The 5,158 jobs identified include active and inactive jobs. The inactive jobs will be identified during development. The final number of jobs to be migrated may be less than the initial count identified.

2 RECOMMENDATIONS

2.1 C-IV Jobs

2.1.1 Overview

The C-IV jobs identified will be listed in Supporting Document 1. These will be migrated and configured to run in CalSAWS.

2.1.2 Description of Change

1. For each batch job listed in Supporting Document 1:
    a. Port any code associated with the jobs.
    b. Update associated configurations and properties.
2. '00' jobs: Majority of these jobs will fall under Common Jobs and will have the configuration and properties updated to include C-IV and CalWIN counties.
3. County 'XX' jobs (County-specific jobs):
    a. If the job is only specific to one county and has no overlap in either system, the batch job will remain unchanged.
    b. If the batch job exists for multiple counties or exists in both systems and is functionally and logically the same, then these will be converted to a '00' job with a county parameter list to handle the multiple counties.
4. If new jobs are created to support 58 counties add these jobs to the batch scheduler.

2.1.1 Execution Frequency

Varies. Refer to associated BSCR for details.

2.1.2 Key Scheduling Dependencies

Varies. Refer to associated BSCR for details.

2.1.3 Counties Impacted

All Counties.

2.1.4 Data Volume/Performance

No Change.

2.1.5 Failure Procedure/Operational Instructions

No Change.

2.2 Common Jobs

2.2.1 Overview

The Common Jobs identified will be listed in Supporting Document 2. These will be inspected for configuration and batch property discrepancies. Any jobs identified as having discrepancies will be updated so that the job continues to run for all counties.

2.2.2 Description of Change

1. Compare the batch job configuration between C-IV and CalSAWS.
2. If any discrepancies are found, merge configurations to allow the job to run for all counties.
3. Compare the batch job properties between the two systems.
4. If any discrepancies are found, merge properties to allow the job to run for all counties.
5. '00' jobs: Majority of these jobs will fall under Common Jobs and will have the configuration and properties updated to include C-IV and CalWIN counties.
6. County 'XX' jobs (County-specific jobs):
    a. If the job is only specific to one county and has no overlap in either system, the batch job will remain unchanged.
    b. If the batch job exists for multiple counties or exists in both systems and is functionally and logically the same, then these will be converted to a '00' job with a county parameter list to handle the multiple counties.
7. If new jobs are created to support 58 counties add these jobs to the batch scheduler.

2.2.3 Execution Frequency

Varies. Refer to associated BSCR for details.

2.2.4 Key Scheduling Dependencies

Varies. Refer to associated BSCR for details.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

No Change.

2.2.7 Interface Partner

No Change.

2.2.8 Failure Procedure/Operational Instructions

No Change.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch	List of C-IV jobs to be migrated	Phase4_SupportingDocument1C-IVJobs.xlsx
2	Batch	List of Common jobs to be merged	Phase4_SupportingDocument2CommonJobs.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1787	The CONTRACTOR shall migrate the C-IV County Specific Batch Jobs across the impacted Batch modules into the CalSAWS Software as determined during the migration design phase.	• All 58 counties will be incorporated into the same batch schedule. • The jobs that are new since side by side will be migrated into the CalSAWS System. • C-IV County interfaces that were included in LRS baseline will not require functional updates. • The Batch properties and scheduling will have to be updated for each wave separately.	C-IV County specific batch jobs will be migrated to CalSAWS through multiple SCRs.
1789	The CONTRACTOR shall update the CalSAWS Batch Scheduler to account for all the new CalSAWS Batch Jobs that are applicable to all 58 Counties.	- There will be one combined Batch Scheduler for all 58 Counties. - All non County-specific Batch jobs that exist in LRS will run for all 58 Counties, unless otherwise specified in other DDIDs to be County configurable. - The CalSAWS batch schedule will be run nightly, excluding holiday and system down days, unless otherwise agreed to by the Consortia. - The Batch properties and scheduling will have to be updated for each wave separately	New jobs are added to the scheduler. Non county jobs will be updated to run for all counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214196 | DDID 1967

Remove System, County, or Agency specific references/logos from Non-State Form headers

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/23/2020	1.0	Initial Revision	Rainier Dela Cruz
07/14/2020	1.1	Updates based on QA feedback	Rainier Dela Cruz
08/25/2020	1.2	Added technical clarification in Section 2.1.2.2.	Rainier Dela Cruz

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1 OVERVIEW

1.1 Current Design

The form headers in LRS/CalSAWS contain System, Los Angeles County, or Agency references. The headers also contain Los Angeles County specific logos and Director and Board of Supervisor names.

1.2 Requests

Update and/or remove any System, Los Angeles County, or Agency references, Los Angeles County specific logos, and Director and Board of Supervisor names from the form headers.

1.3 Overview of Recommendations

1. Remove Los Angeles County specific logos.
2. Update 'County of Los Angeles' static text to a dynamic variable that is populated with the county name where the case is managed.
3. Remove Los Angeles County Agency references.
4. Remove Los Angeles County Director and Board of Supervisor names.

1.4 Assumptions

1. Existing form trigger conditions will NOT be updated.

2 RECOMMENDATIONS

2.1 Update Form Header

2.1.1 Overview

Update and/or remove any System, Los Angeles County, or Agency references, Los Angeles County specific logos, and Director and Board of Supervisor names from the form headers.

2.1.2 Description of Change

1. Remove Los Angeles County specific logos from the form headers.
2. Update 'County of Los Angeles' static text to a dynamically populated variable and populate it with the county name where the case is managed in.
    a. Update 'County of Los Angeles' to 'County of <CountyName>', where '<CountyName>' is a variable.
    b. Add population logic to populate the variable. The variable will be populated as follows:

Variable	Description	Population
CountyName	The name of the county.	The variable will be populated with the name of the county where the case is managed.

Technical Note: The Document Parameters page the ABP 127 DVS form and the PA 106 form uses will be updated to populate the county name. The Document Parameters page will be updated from 'Blank.jsp' to 'StaticPDF.jsp'. No updates to the Document Parameters page for the other existing forms.

3. Remove Agency references or replace the agency name with 'State of California'.
4. Remove County Director and Board of Supervisor names.

Note: Please refer to **Section 3 Supporting Document #1** for the specific headers that contain logos, county name, agency, and Director and Board of Supervisor names and the updates for each header.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	List of Form Headers	List of Form Headers.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The system change request updated and/or removed any System, Los Angeles County, or Agency references, Los Angeles County specific logos, and Director and Board of Supervisor names from the form headers.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214197 | DDID 1967

Update Template Repository to display Correspondence based on County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/24/2020	1.0	Initial Document	Jasmine Chen

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1 OVERVIEW

1.1 Current Design

Currently the LRS/CalSAWS Template Repository stores the Los Angeles County's Form and NOA templates.

With the migration of 57 counties into CalSAWS, this creates the need to categorize the correspondence templates and distinguish which are used by Los Angeles County only, by the 57 Migration counties, or are used by all 58 counties.

1.2 Requests

Update the Template Repository Search page to display correspondence relevant to the county of the logged-in user.

1.3 Overview of Recommendations

1. Create a DBCR (database change request) to categorize existing correspondence templates into 3 categories: used by Los Angeles County, by the 57 Migration counties, or are used by all 58 counties.
2. Update the Template Repository Search's Results Summary section to display results based on the county of the logged-in user.

1.4 Assumptions

1. Los Angeles County's existing Form/NOA templates and correspondence processes will remain the same.
2. The below SCRs are also planned for the 20.11 release and will introduce new forms to the system:
    a. CA-211773 will replace outdated SAR 377.5 with the newer form of CF 377.5 SAR.
    b. CA-207399 will migrate CalWORKs/CalFresh Recertification Packets.
    c. CA-201968 will migrate forms of CSF 106, 107, 108, 109, and 110.

2 RECOMMENDATIONS

2.1 Template Repository Search page

2.1.1 Overview

Update the Template Repository Search's Results Summary section to display the relevant correspondence based on the county of the logged-in user.

2.1.2 Mockup

N/A – No page changes

2.1.3 Description of Changes

1. Update the Template Repository Search Results Summary section to display results based on the county of the logged-in user.
   a. If the county of the user is one of the 57 Migration counties, display the relevant results of correspondence templates used by the 57 Migration counties and common templates used by all 58 counties.
   b. If the county of the user is Los Angeles County, display the relevant results of correspondence templates used by Los Angeles County and common templates used by all 58 counties.

2.1.4 Page Location

- **Global:** Client Corresp.
- **Local:** Templates
- **Task:** Templates

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Categorizing Forms/NOAs – Database Change Request (DBCR)

2.2.1 Overview

LRS/CalSAWS correspondence will be categorized into 3 categories: used by Los Angeles County only, by the 57 Migration counties, or used by all 58 counties.

2.2.2 Description of Change

1. Create a DBCR for existing LRS/CalSAWS correspondence templates in the Template Repository to be categorized as one of the following:
   a. Los Angeles County only
   b. 57 Migration counties
   c. All 58 counties

Note: Supporting document, CA 214197 – Categorization of LRS_CalSAWS correspondence.xlsx, details the categorization of existing LRS/CalSAWS correspondence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Client Correspondence	The categorization of existing LRS/CalSAWS correspondence.	CA 214197 – Categorization of LRS_CalSAWS correspondence.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Updated the Template Repository to display correspondence based on the county of the logged-in user.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214198 | DDID 1967

Update State Form Batch jobs to run for all Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/15/2020	.01	Initial Draft	Howard Suksanti

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1 OVERVIEW

This SCR will update State Form Batch jobs to run for all Counties.

1.1 Current Design

CalSAWS State Form Batch jobs run for Los Angeles County only.

There is one batch job that creates an appointment and triggers a State Form – PB19C898. This batch job schedules Non Compliance Appointments for WTW/REP participants whose program status is in Non Compliance. This job also triggers the following State Forms: NA 840, NA 845 Set, WTW 4.

1.2 Requests

Modify State Form Batch jobs to run for all Counties.

1.3 Overview of Recommendations

1. Create a BPCR to add/modify County Code List Batch properties to include all Counties.
2. Create a BPCR to rename State Form Batch jobs that are not currently '00' jobs to be '00' jobs.
3. Modify State Form Batch modules to support County Code List property.

1.4 Assumptions

1. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted in to the batch job.
2. The scheduling SCRs mentioned above will cover the opt in/out functionality and can be verified once implemented.

2 RECOMMENDATIONS

Modify State Form Batch jobs to run for all Counties.

2.1 BPCR to add County Code List Batch properties and rename batch job to '00' job

2.1.1 Overview

State Form Batch jobs that have only Los Angeles County code in the County Code List batch property will be modified to add all opt-in County codes.

In addition, State Form Batch jobs that are '19' job will be rename to a '00' job.

2.1.2 Description of Change

1. Create a BPCR to add all 58 Counties into the County Code List Batch property.
2. Rename all the County '19' Batch jobs to be a '00' job.

Note: Counties that opt-in to batch job - PB19C898 will get both the auto generating of an appointment and the Form generation logic.

List of Batch jobs that will be modified:

Job Name	Form Name
PB00R1986	MC 355 Initial
PB00R441	M40-181A
PB00R533	DFA 377.1A
PB19R1906	CL 2
PB19R1921	SAR22
PB19R1938	NA 818
PB19R1940	CW TL A979I
PB19R1941	CW TL A980I
PB19R1942	CW TL A981I
PB19R1943	MC 358S ICT M1821
PB19R1956	CW 2208
PB19R1957	NA 820
PB19R1958	NA 823
PB19R1969	MC 239 FFY-3
PB19R1971	NA 1276
PB19R1972	WTW 43 and CW 2186A

Job Name	Form Name
PB19R1973	CLLA 1
PB19R1974	CW 2208
PB19R1985	M40-195A
PB19R1994	WTW 38
PB19R1995	CF 377.2B
PB19R1997	NA 1275
PB19R1998	SNB8
PB19R1999	TNB8
PB19R2001	NA 791
PB19R537	DFA 386
PB19R538	CL 9.1
PB19R539	SAR 2 Form

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Data Volume/Performance

N/A.

2.1.7 Failure Procedure/Operational Instructions

No Change.

2.2 Modify State Form Batch modules to support County Code List property

2.2.1 Overview

Some State Form batch job modules do not support a County Code List property. As part of this SCR, the batch job modules will be modified to support a County Code List.

2.2.2 Description of Change

1. Create a BPCR to rename the County Code property to be County Code List.
2. Modify the following Batch jobs modules to support a County Code List property.
3. Create a BPCR to add all 58 Counties into the County Code List Batch property.
4. Rename all the County '19' Batch jobs to be a '00' job.

Job Name	FORM NAME
PB19F108	M44-352A and NA 274G
PB19R404	MC176TMC
PB19R405	MC176TMC
PB19R410	SAR7
PB19R570	SAR377.2
PB19R440	960X SAR
PB19C898	NA 840, NA 845 Set, WTW 4

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

N/A.

2.2.7 Failure Procedure/Operational Instructions

No Change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	State Form Batch jobs will be modified to run for all Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA–214353 | DDID 374

Update 1099 Interfaces for Migration Counties to Process EDBC Authorized Issuances

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/1/2020	1.0	Initial Revision	Duke Vang
8/17/2020	1.1	Design clarification indicating the external recovery accounts will not be included in the interface	Duke Vang

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1 OVERVIEW

This document outlines the changes to the 1099 Interfaces for Migration Counties in CalSAWS.

1.1 Current Design

The 1099 Interfaces capture payments made to 1099able vendors via the Needs, Supportive Services, and Payment Request functionality. The original 1099 Interface baseline code was migrated into CalSAWS as part of the original LEADER Replacement System (LRS) go-live. This interface currently does not run for Los Angeles County and thus is not currently scheduled to run in CalSAWS. All 1099 payment information for Los Angeles County is sent through their eCAPS interface (VCC1 and VCM1).

1.2 Requests

Per Design Differences ID (DDID) 374, enhancements were made to the Homeless Assistance (HA) functionality to allow vendor payments and vouchers to be issued to the Homeless Temporary (HT) and Homeless Permanent (HP) programs. Since HA programs are fully automated programs in CalSAWS (i.e., EDBC programs), this means that payments to 1099able vendors can now be made through EDBC authorized issuances. The 1099 Interface for Migration Counties needs to be updated to capture payments made to 1099able vendors via EDBC authorized issuances.

1.3 Overview of Recommendations

1. Update the sweep logic in the 1099 Interface for Migration Counties to also scope in on EDBC authorized issuances as potential 1099able payments to vendors.

1.4 Assumptions

1. The latest versions and batch properties of the 1099 Interfaces for Migration Counties will be migrated into the CalSAWS System with DDID 1787 before or at the same time as DDID 374 CA-214353 (this SCR).
2. Los Angeles County will not utilize the 1099 Interface for Migration Counties. There are no changes to the Los Angeles County 1099 payment process through eCAPS.
3. All batch scheduling and CalWIN County opt in/opt out decisions will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.
4. CalWIN Counties that opt in to 1099 Interface functionality will use the Migration County 1099 Interface, used by the former ISAWS Counties.
5. All partner interface testing will be addressed by DDID 1970.
6. External Recovery Accounts will not be included in the 1099 Interface as they are not tied to a specific program or benefit month.

2 RECOMMENDATIONS

2.1 Merced and San Bernardino County 1099 Interface (PO24F602 and PO36F603)

2.1.1 Overview

The Merced and San Bernardino County 1099 Interface will be updated to include EDBC authorized issuances paid to 1099able vendors.

Note: San Bernardino and Merced County share the same 1099 Interface core logic.

2.1.2 Description of Change

1. Update the Data Access Object (DAO) that is shared between the San Bernardino and Merced 1099 Interface to also pull in EDBC authorized issuances issued to 1099able vendors.

   Technical Note: This change encompasses updates to add additional getters and setters methods for the EDBC authorized issuances.

2.1.3 Execution Frequency

N/A – Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.1.4 Key Scheduling Dependencies

N/A – All Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.1.5 Counties Impacted

Merced County

San Bernardino County

2.1.6 Data Volume/Performance

Los Angeles County – N/A

C-IV Migration Counties – 32,849 issuances per month

CalWIN Migration Counties – N/A

2.1.7 Interface Partner

Merced and San Bernardino IT Departments

2.1.8 Failure Procedure/Operational Instructions

N/A – All operational procedures will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.2 Riverside County 1099 Interface (PO33F607)

2.2.1 Overview

The Riverside County 1099 Interface will be updated to pull in EDBC authorized issuances paid to 1099able vendors.

Note: Some of the San Bernardino and Merced County 1099 Interface core logic is shared with Riverside County's 1099 Interface.

2.2.2 Description of Change

1. Update the DAO for Riverside County's 1099 Interface to pull in EDBC authorized issuances issued to 1099able vendors.

   Technical Note: This change encompasses updates to add additional getters and setters methods for the EDBC authorized issuances.

2.2.3 Execution Frequency

N/A – Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.2.4 Key Scheduling Dependencies

N/A – All Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.2.5 Counties Impacted

Riverside County

2.2.6 Data Volume/Performance

Los Angeles County – N/A

C-IV Migration Counties – 32,849 issuances per month

CalWIN Migration Counties – N/A

2.2.7 Interface Partner

Riverside County IT Department

2.2.8 Failure Procedure/Operational Instructions

N/A – All operational procedures will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.3 Stanislaus County 1099 Interface (PO50F602)

2.3.1 Overview

The Stanislaus County 1099 Interface will be updated to pull in EDBC authorized issuances paid to 1099able vendors.

2.3.2 Description of Change

1. Update the DAO for Stanislaus County's 1099 Interface to also pull in EDBC authorized issuances issued to 1099able vendors.

   Technical Note: This change encompasses updates to add additional getters and setters methods for the EDBC authorized issuances.

2.3.3 Execution Frequency

N/A – Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.3.4 Key Scheduling Dependencies

N/A – All Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.3.5 Counties Impacted

Stanislaus County

2.3.6 Data Volume/Performance

Los Angeles County – N/A

C-IV Migration Counties – 32,849 issuances per month

CalWIN Migration Counties – N/A

2.3.7 Interface Partner

Stanislaus County IT Department

2.3.8 Failure Procedure/Operational Instructions

N/A – All operational procedures will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.4 Migration County (Former ISAWS Counties) 1099 Interface (POXXF602)

2.4.1 Overview

The Migration County 1099 Interface, used by the former ISAWS C-IV Migration Counties, will be updated to pull in EDBC authorized issuances paid to 1099able vendors.

2.4.2 Description of Change

1. Update the DAO for the Migration County (former ISAWS C-IV Counties) 1099 Interface to also pull in EDBC authorized issuances issued to 1099able vendors.

   Technical Note: This change encompasses updates to add additional getters and setters methods for the EDBC authorized issuances.

2.4.3 Execution Frequency

N/A – Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.4.4 Key Scheduling Dependencies

N/A – All Batch Scheduling details will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.4.5 Counties Impacted

Alpine County
Amador County
Butte County
Calaveras County
Colusa County
Del Norte County
El Dorado County
Glenn County
Humboldt County
Imperial County
Inyo County
Kern County
Kings County
Lake County
Lassen County
Madera County
Marin County
Mariposa County
Mendocino County
Modoc County
Mono County
Monterey County
Napa County
Nevada County
Plumas County
San Benito County
San Joaquin County
Shasta County
Sierra County
Siskiyou County
Sutter County
Tehama County
Trinity County
Tuolumne County
Yuba County

2.4.6 Data Volume/Performance

Los Angeles County – N/A

C-IV Migration Counties – 32,849 issuances per month

CalWIN Migration Counties – Unknown

2.4.7 Interface Partner

The various county IT departments

2.4.8 Failure Procedure/Operational Instructions

N/A – All operational procedures will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
374	The Contractor shall update the Homeless Assistance functionality as follows: 1) Add the ability to evaluate for the Homeless Permanent program that the total monthly household income (TMHI) is at or below the approved State Standard percentage (currently 80%) and the rent amount should be broken out month by month for 2 months separately for each month on the Expense Amount Detail page for the expense category of shelter and expense type homeless-past due rent. Generate a Denial Notice of Action if the back rent amount exceeds TMHI. 2) Add Money Management functionality for Homeless Permanent and Homeless Temporary in order to: a) Issue single party checks to vendors without the Payee/Case name (e.g., landlord, hotel, utility company). b) Split Utility Payments. c) Issue the remainder amount of the Temporary Homeless payment to the customer when hotel cost is less than the amount issued. 3) Add the ability to issue Homeless Assistance vouchers for the service arrangement types in C-IV that allow voucher payments.	The Past Due Rent eligibility rules that evaluate whether the total monthly household income (TMHI) is below the approved State Standard percentage (currently 80%) and that break out the rent amount for each month for a maximum of 2 months will be developed in accordance to regulation 44-211.531B.	All 1099 interfaces for Migration Counties have been updated to include EDBC authorized issuances issued to 1099able vendors.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215978 | DDID 2080

Update Actual Hours History page to include Excused Hours

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/01/2020	1.0	Original Document	Melissa Mendoza

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1 OVERVIEW

1.1 Current Design

In the LRS/CalSAWS system Welfare to Work (WTW) Activities are tracked within the Customer Activities pages. The Activities are tracked on a weekly basis for attendance actual hours as well as excused absences. The Actual Monthly Hours does not include excused absences hours on the Actual Hours History page, which was introduced with CA-207121.

1.2 Requests

Per DDID 2080, display a summary of attendance for a 12 month period for any activity within WTW for actual hours. The Actual Hours History page should include the hours from Excused Absences.

1.3 Overview of Recommendations

1. Update the Actual Hours History page to include excused absences hours in the Actual Monthly Hours total.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

The Actual Hours History page displays Actual Monthly Hours for a selected year. The page should be adding the excused absences that have been recorded into the total.

2.1 Actual Hours History – Update Actual Monthly Hours Calculation

2.1.1 Overview

Update the Actual Hours History page to include excused absences in the Actual Monthly Hours total calculation.

2.1.2 Actual Hours Monthly Mockup

N/A – No change to page display

2.1.3 Description of Changes

1. Add the hours that have been entered as Excused Absences for the Activity to the Actual Monthly Hours calculated on the Actual Hours History page.

2.1.4 Page Location

- **Global: Empl. Services**
- **Local: Activities**
- **Task: Actual Hours History**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2080	The CONTRACTOR shall display a summary of attendance for a 12 month period for any activity within WTW for actual hours.	N/A	Update the Actual Hours History page to include the hours for excused absences in the total for each month.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217208 | DDID 319

Fund Codes Updates for C-IV Migration Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/17/2020	1.0	Initial Revision	Duke Vang
7/14/2020	1.1	Updates based on DEL Comments	Duke Vang

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1 OVERVIEW

1.1 Current Design

Pay Codes are utilized in LRS/CalSAWS to identify Supportive Service or Ancillary issuances that are not part of a program's regular benefit. Fund Codes are utilized in LRS/CalSAWS to map a county expenditure to a county accounting string/funding source. Pay Codes and Fund Codes can be configured by County and Program. There are approximately 418 Pay Codes and 1,129 Fund Codes that are currently active for Los Angeles County in LRS/CalSAWS.

1.2 Requests

Per Design Differences Identification (DDID) 319 CA-207471, all Pay Codes for the 39 C-IV Migration Counties have been migrated into LRS/CalSAWS.

This design will migrate the Fund Codes for the C-IV Migration Counties into LRS/CalSAWS and refactor the existing code to treat Fund Codes as a county specific value.

1.3 Overview of Recommendations

1. The impacted fiscal functionality and fiscal reports will be refactored to view Fund Codes as county specific values.
2. The C-IV Migration County Fund Code values will be migrated into LRS/CalSAWS.

1.4 Assumptions

1. Interface testing with the C-IV Migration Counties will be addressed by DDID 1979.

2 RECOMMENDATIONS

2.1 Refactoring Code Changes

2.1.1 Overview

There will be refactoring efforts made to code that utilizes the "Pay Code" and "Fund Code" tables to filter by County Code and Effective Dating.

2.1.2 Description of Changes

1) Refactor the following fiscal code files that look at FUND_CODE_MAP to filter by County Code and/or check for Effective Dating:
   a) application/src/bsd/main/java/org/civ/bsd/batch/recovery/data/GRCAPIRecoveryDaoImpl.java
      i) PB19F207 – GR/CAPI Recovery Account Batch
      ii) PB19F216 – GR/CAPI Valuable Recovery Account Batch
   b) application/src/bsd/main/java/org/civ/bsd/collections/interimassistancerecovery/data/IARDaoImpl.java
      i) IAR Detail page
   c) application/src/bsd/main/java/org/civ/bsd/collections/overpayment/data/OverpaymentAdjustmentDaoImpl.java
      i) EDBC Summary
      ii) Batch EDBC
   d) application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/data/EcapsJVWDaoImpl.java
      i) PB19F410 to PB19F412 – eCAPS Expenditure Reports Writer
   e) application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/evss/data/EcapsEVSSDaoImpl.java
      i) PB19F427 to PB19F428 – eCAPS EVSS Writer
   f) application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/swr/data/SpecialWarrantRequestDao.java
      i) PB19F413 to PB19F447 – eCAPs Special Warrant Request Writer
   g) application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/twr/data/TrustWarrantRequestDao.java
      i) PB19F414 – eCAPS Trust Warrant Request Writer
      ii) PB19F483 – eCAPS Trust Warrant Request Writer

   Testing Note: Some of these files are used by multiple pages and/or batch jobs. Please consult with the development team for a comprehensive list of impacted pages and/or batch jobs and how they are impacted.

2) Refactor the following fiscal report files that look at FUND_CODE_MAP to filter by County Code and/or check for Effective Dating
   a) BIPublisher11g/Fiscal/Cash EBT Production Reconciliation Report.xdm
   b) BIPublisher11g/Fiscal/Claim Grand Totals Detail.xdm
   c) BIPublisher11g/Fiscal/Claim Grand Totals Summary.xdm
   d) BIPublisher11g/Fiscal/DCFS Claim Data.xdm
   e) BIPublisher11g/Fiscal/Daily EVOC-EVSVS.xdm
   f) BIPublisher11g/Fiscal/Daily Journal Voucher Warrant.xdm
   g) BIPublisher11g/Fiscal/Daily Payroll Certification Report.xdm
   h) BIPublisher11g/Fiscal/Direct Deposit Production Reconciliation Report.xdm
   i) BIPublisher11g/Fiscal/EBT Replacements Report.xdm
   j) BIPublisher11g/Fiscal/Education Support Payment Weekly.xdm
   k) BIPublisher11g/Fiscal/Integrated Payroll Benefit Issuance Detail Claiming Report by Case.xdm
   l) BIPublisher11g/Fiscal/Integrated Payroll Benefit Issuance Detail Claiming Report.xdm
   m) BIPublisher11g/Fiscal/JVW Daily Details Report.xdm
   n) BIPublisher11g/Fiscal/JVW Month-End Details Report.xdm
   o) BIPublisher11g/Fiscal/JVW Monthly Details Report.xdm
   p) BIPublisher11g/Fiscal/Main Payroll Benefit Direct Deposit Production Reconciliation Report.xdm
   q) BIPublisher11g/Fiscal/Main Payroll Benefit EBT Production Reconciliation Report.xdm
   r) BIPublisher11g/Fiscal/Main Payroll Benefit Warrant Production Reconciliation Report.xdm
   s) BIPublisher11g/Fiscal/Month-End JVW Cancellations and Expungements Report.xdm
   t) BIPublisher11g/Fiscal/Monthly Assistance Auto Payroll Report.xdm
   u) BIPublisher11g/Fiscal/Monthly EVOC-EVSVS Report.xdm
   v) BIPublisher11g/Fiscal/Monthly Journal Voucher Warrant Report.xdm
   w) BIPublisher11g/Fiscal/Monthly Payroll Certification Report.xdm
   x) BIPublisher11g/Fiscal/Payroll Customer EBT Cancellations and Expungements Report.xdm
   y) BIPublisher11g/Fiscal/Payroll Customer and Vendor Warrant Cancellations and Outlaws Report.xdm
   z) BIPublisher11g/Fiscal/SSI-SSP Activity Monthly Report.xdm
   aa) BIPublisher11g/Fiscal/Supplemental Benefit Manual Warrant Issuance Register.xdm
   bb) BIPublisher11g/Fiscal/Vendor Payroll Warrant Register Daily.xdm
   cc) BIPublisher11g/Fiscal/Vendor Payroll Warrant Register Monthly Report.xdm

dd) BIPublisher11g/Fiscal/Warrant Production Reconciliation Report.xdm
ee) BIPublisher11g/State/TEMP 2035 EBT THEFT Skimming.xdm
ff) BIPublisher11g/State/TEMP 2313 EBT THEFT Scam.xdm
gg) BIPublisher11g/State/WINS Cert Report.xdm
hh) BIPublisher11g/Fiscal/1099 Monthly Control Report
ii) BIPublisher11g/State/GR 237 Report

3) Extract the latest Fund Code Mapping values from the C-IV code repository and insert them into LRS/CalSAWS for the C-IV Migration Counties. The extract will include all mappings including ones that have been end dated.

2.1.3 Programs Impacted

Cal-Learn

CalWORKs

CAPI

Child Care

General Assistance (Managed)

Homeless – Perm

Homeless – Temp

Immediate Need

RCA

Welfare to Work

2.1.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
319	The CONTRACTOR shall migrate and merge the 39 C-IV Migration Counties pay codes into CalSAWS. The 18 CalWIN Migration Counties pay types will be converted into equivalent pay codes in CalSAWS. All pay code dropdown fields in CalSAWS will only display pay codes that are applicable to the county user login.	1. The pay code and pay type migration effort will include fund code mappings. 2. Only the county accounting strings for the legacy C-IV Counties (Merced, Stanislaus, San Bernardino, and Riverside) will be migrated and maintained in CalSAWS. All other counties will only have their fund codes migrated.	1. The impacted fiscal code has been refactored to view Fund Codes as county specific values. 2. The impacted fiscal reports have been refactored to view fund codes as county specific values. 3. The C-IV Migration Counties fund codes have been migrated into CalSAWS.