

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-202851

Update Change Reason for Converted Data

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mark Keehn
	Reviewed By	Jason Francis

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/27/2020	1	Initial write up	Mark Keehn

Table of Contents

1	Overview	4
	1.1 Current Design.....	5
	1.2 Requests.....	6
	1.3 Overview of Recommendations.....	6
	1.4 Assumptions	6
2	Recommendations.....	7
	2.1 Eligibility – Update Change Reason Logic for Converted CalWIN Data.....	7
	2.1.1 Overview	7
	2.1.2 Description of Changes	8
	2.1.3 Programs Impacted	9
	2.1.4 Performance Impacts	10
	2.2 Eligibility – Define Comparable Data Record for Converted C-IV Data.....	10
	2.2.1 Overview	10
	2.2.2 Description of Changes	11
	2.2.3 Programs Impacted	12
	2.2.4 Performance Impacts	12
3	Requirements.....	12
	3.1 Project Requirements.....	12
	3.2 Migration Requirements.....	Error! Bookmark not defined.
4	Migration Impacts	Error! Bookmark not defined.
5	Outreach.....	Error! Bookmark not defined.
	5.1 Lists.....	Error! Bookmark not defined.
6	Appendix.....	Error! Bookmark not defined.

1 OVERVIEW

In preparation for the migration of C-IV and CalWIN counties to CalSAWS, this SCR will make changes to the system to account for Change Reason data converted from C-IV and CalWIN. This is necessary because there are specific differences in the way that C-IV and CalWIN collect and process Change Reason related data that makes it impossible to perfectly convert Change Reason data in all cases. Please refer to SCR **CA-208334 DDID 1053: Change Reason Research Analysis** for the full write up of these differences and their impacts.

This SCR does not propose **any alteration** of the existing Change Reason logic for how an Apply Date is currently defined **for non-converted data**. The Change Reason logic will predominately remain the same even for converted C-IV and converted CalWIN data other than the specific changes defined in this SCR.

Because this SCR deals with the treatment of converted data there will be a need to reference database tables in some cases. When this is done, the following terminology will be used: data record, ECL, and ECAD.

Data Record

This will refer to a Change Reason related data table, which is impacted by Change Reason logic, for example, income (INC_AMT_DETL) or residency (RES).

EDBC CHNG LOG (ECL)

This refers to the EDBC_CHNG_LOG table (or ECL table) which tracks the Change Reason and Reported Date that gathered for Change Reason data records (like income).

Income Amount Detail

*- Indicates required fields

Edit

Close

Program: Cash / CalFresh

Change Reason

Change Reason:

Participant Provided - Verbal

Reported Date:

04/01/2020

View

There are two types of ECL records.

1. Record ECL – The Record ECL tracks the Change Reason and Report Date associated with the Data Record.
2. End Date ECL – The End Date ECL tracks the Change Reason and Report Date associated with the End Date.

Change Reason List

[Close](#)

Search Results Summary						Results 1 - 2 of 2
Evaluated:	Display	From: *	To: *			View
<input type="button" value="No"/>		08/01/2009	08/31/2020			
Type	Change Reason	Report Date	Begin Date	End Date	Evaluated	
Income Amount Detail	Participant Provided - Verbal	04/01/2020	04/01/2020		No	Edit
Employment Detail	Intake	09/11/2017	01/02/2017		No	Edit

EDBC CHNG APPLY DATE (ECAD)

This refers to the EDBC_CHNG_APPLY_DATE table (or ECAD table) which tracks the Apply Date by program that is determined by the Change Reason logic based on the Change Reason, Report Date, and other data.

CalFresh Change Reason List - New Apply Dates

[Close](#)

Search Results Summary							Results 1 - 1 of 1
Type	Change Reason	Report Date	Begin Date	End Date	Apply Date	Apply Reason	
Income Amount Detail	Participant Provided - Verbal	04/01/2020	04/01/2020		08/01/2020	Mid Period - Negative	

1.1 Current Design

CalSAWS Change Reason logic does not currently account for some data differences that will occur with data converted from C-IV and CalWIN.

There is existing Change Reason logic within CalSAWS that was put in place for the LEADER conversion for LA County. When this logic identifies Change Reason data records with no associated ECL or ECAD record (as would normally be the case), the system will internally assume an Apply Date that is equal to the Begin Date of the data record. This existing logic will also be used for CalWIN and C-IV converted data records when no ECL or ECAD record can be converted.

1.2 Requests

Update CalSAWS Change Reason logic to account for data differences that will occur with data converted from C-IV and CalWIN

1.3 Overview of Recommendations

1. **CalWIN converted data** - Update Eligibility Change Reason logic to not adjust the CalWIN converted Apply Date except in the following scenarios.
 - a. Income and household status can be adjusted if the IRT is exceeded.
 - b. All non-household data types (including income) can be adjusted for new applicants or if the period is being established (i.e., due to SAR or recertification).
2. **C-IV converted data** - Update logic which defines the comparable data records during Change Reason determinations to account for converted C-IV data with an ECL and ECAD record but with no defined Apply Date.

1.4 Assumptions

1. CalWIN uses a Use Effective Month (UEM) to define when a data change can be applied. The UEM is the functional equivalent of the Apply Date within CalSAWS.
2. In CalSAWS there are six Change Reason Programs: CalWORKs (CW), Refugee Cash Assistance (RCA), CalFresh (CF), General Assistance/General Relief (GA/GR), Cash Assistance Program for Immigrants (CAPI), and Nutrition Benefit (NB). CalWIN defines a UEM for CW, RCA, and CF. Given this, only these programs will have an Apply Date converted from CalWIN. This means that CalSAWS other Change Reason programs, GA/GR, CAPI, NB will not have an Apply Date converted from CalWIN and will thus use the data record Begin Date as the Apply Date.
3. For data records for which CalWIN does not track a UEM, migration will not convert an ECL or ECAD record into CalSAWS for that data. In those situations, the data record Begin Date will be used for the Apply Date.
4. No End Date ECL records (i.e., END_DATE_IND = 'Y') will be converted from CalWIN.
5. GA/GR programs migrated to CalSAWS from C-IV will not use the existing GA/GR logic in CalSAWS used by LA county. Therefore, C-IV county GA/GR programs will not utilize Change Reason logic.
6. GA/GR programs migrated to CalSAWS from CalWIN will use the existing GA/GR logic in CalSAWS with modifications specific to CalWIN counties. However, as mentioned above, CalWIN does not define a UEM for GA/GR to be converted to an Apply Date.
7. Currently CalSAWS only generates an internal Apply Date related to a change in the household status. This internal Apply Date is not stored to the database or displayed to the user. This will not change with this SCR.
8. C-IV implemented SCR **CIV-100195 Add Change Reason to Data Collection Pages** in release 19.03 to begin gathering Change Reason and Reported Date.

In addition, this SCR updated C-IV to set an Apply Date for income processed. All other C-IV Change Reason data will not have an Apply Date defined. This means when a user initially processes an EDBC, the Change Reason list page would display all converted Change Reason data (other than income with an Apply Date) as unevaluated.

Any converted data record that was converted with an Apply Date already defined (income only) or that later receives an Apply Date in CalSAWS will display on the Change Reason List page as evaluated.

Change Reason List

Search Results Summary						Results 1 - 8 of 8
Type	Change Reason	Report Date	Begin Date	End Date	Evaluated	
School Attendance Status Detail	Reported on PR/RE	09/13/2018	06/01/2014		No	Edit
School Attendance Detail	Reported on PR/RE	09/13/2018	06/01/2014		No	Edit
Income Amount Detail	Participant Provided - Verbal	03/01/2019	01/01/2019		No	Edit
Income Amount Detail	Intake	09/01/2015	09/30/2015		No	Edit

2 RECOMMENDATIONS

2.1 Eligibility – Update Change Reason Logic for Converted CalWIN Data

2.1.1 Overview

Update Eligibility Change Reason logic to not alter the CalWIN converted Apply Date except for the following scenarios for which the Apply Date can be adjusted if appropriate.

- i. Income and household status can be adjusted if the IRT is exceeded.
- ii. All non-household data types (including income) can be adjusted for new applicants or if the period is being established (i.e., due to SAR or recertification).

The Change Reason logic will predominately remain the same for converted CalWIN data. The table below shows in bold the only scenario for which the Change Reason logic will behave differently based on this SCR for converted CalWIN data. All other scenarios (not bolded) will continue to use existing system logic/behavior.

Users Action	System Action for Data Record Converted with Apply Date	System Action for Data Record Converted with no ECL/ECAD
Data record is not changed	Lock Apply Date with exception for IRT	Apply Date will be the Begin Date
Data record is edited	Determine Apply Date	Determine Apply Date
Data record is end dated	Determine Apply Date for End Date	Determine Apply Date for End Date

When an Apply Date already exists for a data record, the Change Reason logic is only allowed to move the Apply Date to an earlier date when appropriate. This will continue to be the case when a converted CalWIN Apply Date is redetermined when the user has edited the data record.

2.1.2 Description of Changes

1. Add new logic to identify converted CalWIN data when the following conditions are met:
 - a. The database record has a CREATED_BY field equal to a case county code (per the CODE_NUM_IDENTIF for reference table 15, County Code).
 - b. The county code (from point a) is defined as a CalWIN county (per the Consortium Code for reference table 15, County Code).
2. Update the Change Reason logic which sets the Apply Date and the Apply Date Reason for all Change Reason related data records **except household status** to prevent an existing Apply Date for a **converted CalWIN** data record from being adjusted to an earlier benefit month if the following conditions are true. Note: This is being done to preserve the Apply Date defined in the CalWIN system (i.e., the Use Effective Month in CalWIN).
 - a. The Apply Date being evaluated was converted from CalWIN (i.e., the ECAD record is converted CalWIN data and the Apply Date is not null or high date).
 - b. The data record does not meet the following conditions in which an Apply Date for a converted CalWIN data record **can be adjusted** to an earlier benefit month.
 - i. The Apply Date is being adjusted for an income data record (INC_AMT_DETL) AND the Apply Reason is one of the following reasons:
 1. Mid-period negative change type 5 with timely report (CT10550-MNT) – Used for CW and RCA when income is over IRT with a timely report of the income.

2. Mid-period negative change type 5 with untimely report (CT10550-MNU) – Used for CW and RCA when income is over IRT with an untimely report of the income.
 3. Mid-period negative change type 3 (CT10550-MN3) – Used for CF when income is over IRT.
 4. New Applicant (CT10550-NA) – Used for a new applicant to a program.
 5. All Changes (CT10550-AC) – Used when establishing a new period due to SAR7 or recertification.
- ii. The Apply Date is being adjusted for a data record other than income AND the Apply Reason is one of the following reasons:
1. New Applicant (CT10550-NA) – Used for a new applicant to a program.
 2. All Changes (CT10550-AC) – Used when establishing a new period due to SAR7 or recertification.

Technical Note: The logic related to this point resides in the “setApplyDateAndReason” method in the ECAD object.

3. Update the Change Reason logic which determines when a person can be added or removed from a Change Reason program based on Household Status to utilize an Apply Date converted from CalWIN (i.e., the ECAD record is CalWIN converted data) rather than a CalSAWs internally determined Apply Date. No other change is being made with how CalSAWS determines when a person can be added or removed from a program based on household status other than honoring the UEM converted from CalWIN.

Note: When the IRT is exceeded any mid-period applicant that was tested as part of the IRT budget will be included (i.e., applied) regardless of the CalWIN converted Apply Date. This logic is already in place in CalSAWS and will remain even with the above change. In the context of Change Reason, a mid-period applicant could be any of the following:

- a. A pending program person with a role of Member
- b. A program person with a role of Unaided Person (UP) with a role reason of Mid-Period Applicant
- c. A program person with a role of Medi-Cal Member Only (MMO) with a role reason of Mid-Period Applicant

Technical Note: The logic related to this point resides in the “determineApplyDate” method in the HHStatus object.

2.1.3 Programs Impacted

CW, RCA, CF

2.1.4 Performance Impacts

There is no expected performance impact.

2.2 Eligibility – Define Comparable Data Record for Converted C-IV Data

2.2.1 Overview

Update logic which defines the comparable data records during Change Reason determinations to account for converted C-IV data with an ECL and ECAD record but with no defined Apply Date.

When determining whether a data record is beneficial or negative, the Change Reason logic determines whether there is a prior effective dated data record that should be used as the comparable data record. Take the following examples for income. For these examples, assume a CW program with a Jan – June SAR period that includes a Mom and child.

Example 1

Mom has new monthly income of \$100 with a begin date = March 1.

In example 1 the \$100 would be considered a negative change since Mom is going from \$0 to \$100.

Example 2

Mom reports a change of monthly income to \$100 beginning March 1. She was previously earning \$200.

In example 2 the \$100 would be considered a beneficial change since Mom is going from \$200 to \$100.

In examples 1 and 2, the system determines whether there is a “comparable” data record to determine whether the \$100 is beneficial or negative for the CW household.

Example 3

Mom reports a change of monthly income to \$250 beginning Feb 1. She was previously earning \$200. Mom later reports another change of monthly income to \$225 beginning April 1.

In example 3 the \$250 would be considered a negative change since Mom is going from \$200 to \$250. The \$250 could not be applied until the next period.

When Mom reports the \$225 beginning April 1, the \$225 would also be considered a negative change because \$225 is greater than the \$200 Mom was earning from the start of the Period. It would be incorrect for

the system to compare the \$225 to the \$250 and determine that the \$225 was a beneficial change since the \$250 was never applied.

C-IV converted data will fall into three categories:

- a. Data that has no ECL record (Change Reason data) or ECAD record with no Apply Date. This applies to data processed prior to release 19.03.
- b. Data that has both an ECL record (Change Reason data) and ECAD record, but no Apply Date has been defined. This applies to non-income Change Reason data that was processed after release 19.03
- c. Data that has both an ECL record (Change Reason data) and ECAD record with an Apply Date that has been defined. This applies only to income processed after release 19.03.

Data in categories a and c can be identified as comparable data with the existing system logic. Category b data, however, cannot be identified as comparable data.

Because C-IV income processed after the 19.03 release will have an Apply Date defined, income data will fall into category a (pre 19.03) and c (post 19.03). Non-income data records processed after the 19.03 will not have an Apply Date defined and will fall into category a (pre 19.03) and c (post 19.03).

CalWIN converted data will fall into either category a or c. Because of this, only C-IV converted data is impacted by the following change.

2.2.2 Description of Changes

1. Add new logic to identify converted C-IV data when the following conditions are met:
 - a. The database record has a CREATED_BY field equal to a case county code (per the CODE_NUM_IDENTIF for reference table 15, County Code).
 - b. The county code (from point a) is defined as a C-IV county (per the Consortium Code for reference table 15, County Code).
2. Update Change Reason logic to allow a C-IV converted data record that meets the conditions below to be used as a comparable data record even though it does not have an assigned Apply Date. If the conditions below are met, the internal Apply Date for the converted data record will be set to the Begin Date of the data record. This Apply Date (for the comparable record) will only be used internally and will not be saved to the database or displayed to the user.
 - a. The data record is a comparable data record and is not the data record being evaluated for the benefit month being

processed. This will be considered true if the data record being evaluated has an end date that is prior to the benefit month being processed.

- b. The data record is converted from C-IV.
- c. The ECAD record does not have an Apply Date defined.

Note: No changes are being made to the logic that identifies comparable records other than to allow a converted record to be used as a comparable record as described above even when it has no defined 'Apply Date'.

Technical Note: The logic related to this point resides in the "build" method in the ECAD object.

2.2.3 Programs Impacted

CW, RCA, CF, CAPI, NB

2.2.4 Performance Impacts

There is no expected performance impact.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	Change Reason automation has been updated to account for data differences expected when migrating C-IV and CalWIN Change Reason data.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-203392

ACL 16-79 Add Out-of-State Short-Term
Residential Therapeutic Program Placement
Type

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/18/2020	1.0	Initial Draft	T. Lazio
09/23/2020	2.0	Added Assumption # 7	T. Lazio

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	6
2	Recommendations.....	6
2.1	Foster Care Resource and Child Placement Detail Pages.....	6
2.1.1	Overview	6
2.1.2	Foster Care Resource and Child Placement Detail Page Mockups	6
2.1.3	Description of Changes	8
2.1.4	Security Updates.....	8
2.1.5	Page Mapping.....	8
2.1.6	Page Usage/Data Volume Impacts	8
2.2	Rate Detail Page	8
2.2.1	Overview	8
2.2.2	Rate Detail Page Mockups.....	9
2.2.3	Description of Changes	10
2.2.4	Page Location	10
2.2.5	Security Updates.....	10
2.2.6	Page Mapping.....	10
2.2.7	Page Usage/Data Volume Impacts	10
2.3	Update FC EDBC	10
2.3.1	Overview	10
2.3.2	Description of Changes	11
2.3.3	Programs Impacted	11
2.4	DCFS Non-Medical Overlapping Batch Sweep- LA County Only	11
2.4.1	Overview	11
2.4.2	Description of Change.....	12
2.4.3	Execution Frequency.....	12
2.4.4	Key Scheduling Dependencies	12
2.4.5	Counties Impacted	13
2.4.6	Data Volume/Performance.....	13

2.4.7	Failure Procedure/Operational Instructions.....	13
2.5	Foster Care Clothing Allowance Batch:.....	13
2.5.1	Overview	13
2.5.2	Description of Changes	13
2.5.3	Execution Frequency.....	13
2.5.4	Key Scheduling Dependencies	14
2.5.5	Counties Impacted	14
2.5.6	Data Volume/Performance.....	14
2.5.7	Failure Procedure/Operational Instructions.....	14
2.5.8	Programs Impacted	14
2.6	Update Fund Codes for new Placement type	14
2.6.1	Overview	14
2.6.2	Description of Changes	14
2.6.3	Programs Impacted	15
2.7	Counties Interface Testing.....	15
2.7.1	Overview	15
2.7.2	Description of Changes	15
2.8	Automated Regression Test.....	15
2.8.1	Overview	15
2.8.2	Description of Changes	15
3	Requirements.....	16
3.1	Project Requirements.....	16

1 OVERVIEW

ACL 16-79 outlines rate structures for Out of State Short-Term Residential Therapeutic Program (OOS STRTP) placement facilities. This SCR will accommodate the need for adding a new OSS STRTP placement type to differentiate OSS STRTP facilities from other placement facilities for the Foster Care (FC) program.

1.1 Current Design

There is no option to select Out of State Short-Term Residential Therapeutic Program (OOS STRTP) as a placement type on the FC Resource Detail page (RDB). Workers currently use other out-of-state facility types and non-standard rates as a workaround.

'DCFS Non-Medical Overlapping' is a monthly batch sweep job which identifies if a child is active in either a Foster Care or Kin-Gap program and is also active in either a CalWORKS or CalFresh program. If a case is identified the batch job will remove the child from the active CalWORKS/CalFresh case.

1.2 Requests

Add the option of "Out of State STRTP" along with the appropriate rate options so that users can distinguish OSS STRTP placement types from other placement types for the FC program and EDBC will pay the correct rate.

Modify the 'DCFS Non-Medical Overlapping' batch job to include 'Out of State STRTP' as a valid placement type.

1.3 Overview of Recommendations

1. Add "Out of State STRTP" placement type option to the drop down on the Foster Care Resource Detail and Child Placement Detail pages.
2. Update the Rate Detail page for FC placements with appropriate rate drop down options for "Out of State STRTP" placement type.
3. Update FC EDBC to pay the appropriate rate for the new "Out of State STRTP" placement type.
4. Update FC EDBC logic to set appropriate rate structure for "Out of State STRTP" placement type.
5. Update FC EDBC logic to pay Infant Supplemental Payments for the new "Out of State STRTP" placement type.
6. Update the 'DCFS Non-Medical Overlapping' batch job's children placement check to include 'Out of State STRTP'.
7. Update Foster Care Clothing Allowance batch to exclude the new placement type of 'Out of State STRTP'.
8. Add new Fund Codes in LRS for the new placement type of "Out of State STRTP".

1.4 Assumptions

1. Fields and elements on the Foster Care Resource and Rate Detail pages not mentioned in this SCR will be similar to the existing 'Out of State Group Home' placement type.
2. Regression test SOC 158A form if the newly added placement type is getting populated.
3. No modification is being made to the LA County DataMart interface with this SCR to be able to populate this new placement type in the RDB or on individual placements.
4. SCR CA-215442 will implement functionality in CalSAWS to support entering Infant Supplemental Payments on the ISP page. LA county will continue to use Additional Rate with no change.
5. Reports will be updated to reflect the new "Out of State STRTP" placement type as part of SCR CA-218714.
6. The changes in this SCR will not impact Infant Supplemental Payment Consolidation changes implemented in SCR CA-207140. This SCR is only adding one more Placement Type to the list of Placement Types for which the higher Infant Supplemental rate is paid by EDBC.
7. AAP program rate logic for the Out-of-State Short-Term Residential Therapeutic Program placement types will be added as part of SCR CA-220100.

2 RECOMMENDATIONS

2.1 Foster Care Resource and Child Placement Detail Pages

2.1.1 Overview

Add the "Out of State STRTP" placement type option to the drop down on the Foster Care Resource Detail page. This value will also show on the Child Placement Detail page if added to the selected resource.

2.1.2 Foster Care Resource and Child Placement Detail Page Mockups

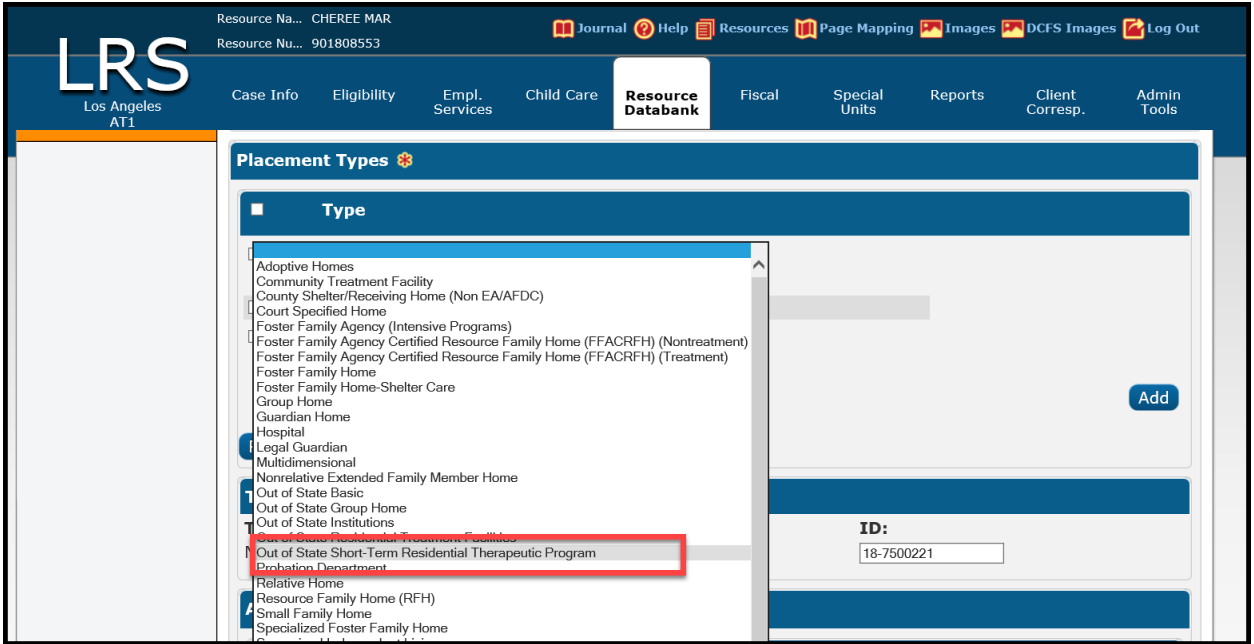


Figure 2.1.2.1 – CalSAWS/LRS: Foster Care Resource Detail Page Placement Type Drop Down with ‘Out of State Short-Term Residential Therapeutic Program’ option Mockup

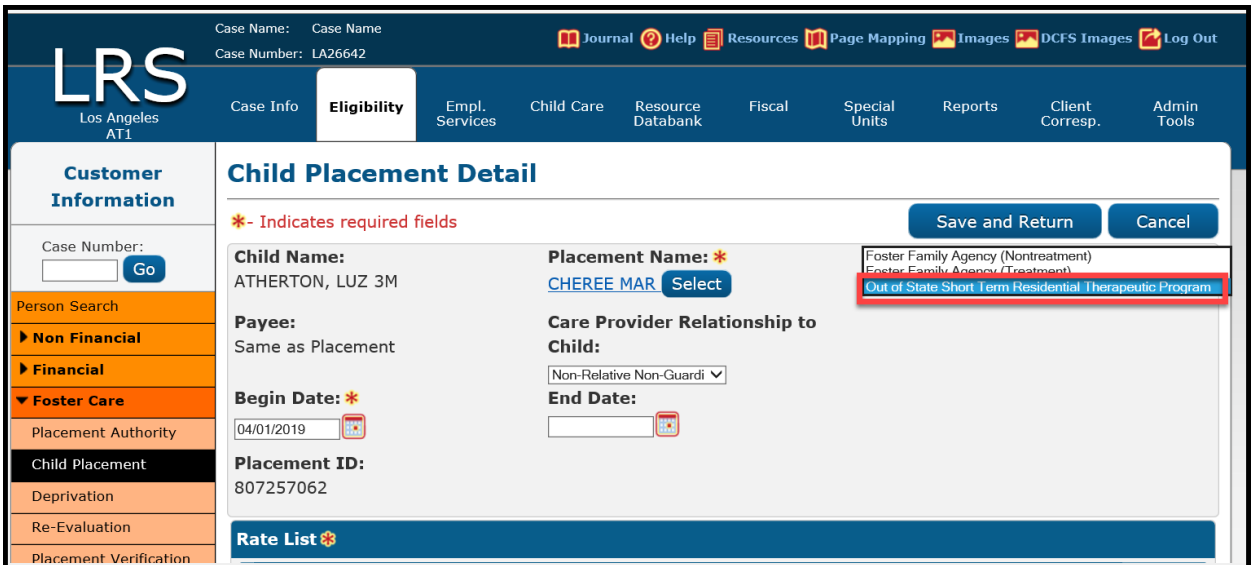


Figure 2.1.2.3 – CalSAWS/LRS: Child Placement Detail Page Placement Type Drop Down with ‘Out of State Short-Term Residential Therapeutic Program’ option Mockup

2.1.3 Description of Changes

1. Add the following new placement type to Code Table 298 (CT 298):
 - a. Out of State Short-Term Residential Therapeutic Program
(Display will be "Out of State Short-Term Residential Therapeutic Program " in the Placement Type field in the Foster Care Resource Detail and Child Placement Detail pages)
- **Page Location Global:** Resource Databank
 - **Local:** Foster Care
 - **Task:** Foster Care Resource Information

2.1.4 Security Updates

N/A

2.1.5 Page Mapping

N/A

2.1.6 Page Usage/Data Volume Impacts

N/A

2.2 Rate Detail Page

2.2.1 Overview

Update the Rate Detail page with the rate type options for the new "Out of State STRTP" placement type.

2.2.2 Rate Detail Page Mockups

The screenshot shows the LRS (Los Angeles ATI) interface. The top navigation bar includes 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The 'Eligibility' tab is active. The main content area is titled 'Rate Detail' and contains a form with the following fields:

- Child Name:** ATHERTON, LUZ 3M
- Type:** Non Standard Rate (highlighted with a red box)
- Non-Standard Sub-Type:** (empty dropdown)
- Rate:** (empty text field)
- Frequency:** (empty dropdown)
- Rate Location:** (empty text field)
- Begin Date:** (empty date field)
- End Date:** (empty date field)

Buttons for 'Save and Return' and 'Cancel' are located at the top right and bottom right of the form area. A legend indicates that an asterisk (*) denotes required fields.

Figure 2.2.2.1 –Rate Detail ‘Non Standard Rate’ option for ‘Out of State Short-Term Residential Therapeutic Program’ placement type Mockup

The screenshot shows the LRS (Los Angeles ATI) interface. The top navigation bar is identical to the previous mockup. The 'Eligibility' tab is active. The main content area is titled 'Rate Detail' and contains a form with the following fields:

- Child Name:** ATHERTON, LUZ 3M
- Type:** Standard State Rate (highlighted with a red box)
- Level of Service:** STRTP (highlighted with a red box)
- Begin Date:** (empty date field)
- End Date:** (empty date field)

Buttons for 'Save and Return' and 'Cancel' are located at the top right and bottom right of the form area. A legend indicates that an asterisk (*) denotes required fields.

Figure 2.2.2.2 – Rate Detail ‘State Standard Rate’ option with Level of Service defaulted to ‘STRTP’ for ‘Out of State Short-Term Residential Therapeutic Program’ placement type Mockup

2.2.3 Description of Changes

1. Update the Rate Detail page to display the following rate type options for Out of State Short-Term Residential Therapeutic Program placement type:
 - a. Non Standard Rate
 - b. Standard State Rate
 - i. When Standard State Rate is selected, the Level of Service field will display.
 - ii. The only value in the Level of Service drop down will be 'STRTP'.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Foster Care > Child Placement

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 FC EDBC

2.3.1 Overview

Update FC EDBC logic to calculate and pay the rate for the new "Out of State STRTP" placement type.

Update FC EDBC logic to set rate structure for "Out of State STRTP" placement type.

Update FC EDBC logic to calculate and pay Infant Supplemental Payments for the new "Out of State STRTP" placement type.

2.3.2 Description of Changes

1. Update the FC EDBC logic to determine the appropriate payment for the new placement type of "Out of State Short-Term Residential Therapeutic Program" based on the following rate types:
 - a. Non Standard Rate
 - i. Use Placement Rate Amount.
 - b. Standard State Rate with level of service of 'STRTP'.
 - i. Retrieve the equivalent to the 'in state' STRTP rate for the benefit month being processed.
2. If the placement type is "Out of State Short-Term Residential Therapeutic Program" and:
 - i. Rate type is 'Standard State Rate' then set the rate structure to 'CCR'.
 - or-
 - ii. Rate type is 'Non-Standard Rate' then set the rate structure to 'Non-CCR'.
3. Update FC EDBC logic to pay the same infant supplemental rate used for the 'in state' STRTP and Group Homes for the new placement type of "Out of State Short-Term Residential Therapeutic Program".

2.3.3 Programs Impacted

FC

2.4 DCFS Non-Medical Overlapping Batch Sweep- LA County Only

2.4.1 Overview

'DCFS Non-Medical Overlapping' is a monthly batch sweep job which identifies if a child is active and pending in either a Foster Care or Kin-Gap program and is also active in either a CalWORKS or CalFresh program. If a case is identified the batch job will remove the child from the active CalWORKS/CalFresh case. The cases will only be processed if the placement type is found in the following list:

Placement Type Code	Placement Type Name
SL	Supervised Independent Living
HT	Hospital
MD	Multidimensional
AI	Foster Family Agency Intensive Programs
AN	Foster Family Agency Nontreatment

Placement Type Code	Placement Type Name
AT	Foster Family Agency Treatment
GH	Group Home
AG	Foster Family Agency
CT	Community Treatment Facility
TF	Transitional Housing Placement FC THP FC
HO	Foster Family Home
HS	Foster Family Home Shelter Care
SF	Specialized Foster Family Home
TS	Tribal Specific Home
SG	Out of State Group Home
SI	Out of State Institutions
SR	Out of State Residential Treatment Facilities
SB	Out of State Basic
PD	Probation Department
TH	Transitional Housing Placement Program THPP
CR	County Shelter Receiving Home Non EA AFDC

2.4.2 Description of Change

Modify Batch Jobs 'PB19E466', 'PB19E467', and 'PB19E468' to include 'Out of State STRTP' as a placement type that can be updated by these batch jobs.

2.4.3 Execution Frequency

No Changes to Execution Frequency for 'PB19E466', 'PB19E467', and 'PB19E468'

2.4.4 Key Scheduling Dependencies

No Changes to Scheduling Dependencies for 'PB19E466', 'PB19E467', and 'PB19E468'

2.4.5 Counties Impacted

Los Angeles County Only

2.4.6 Data Volume/Performance

N/A

2.4.7 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...)

2.5 Foster Care Clothing Allowance Batch:

2.5.1 Overview

The Foster Care Clothing Allowance batch job creates the authorization records that allow Foster children to receive the annual clothing allowance. This job has three frequencies. It runs annually, Semiannually or quarterly based on counties opt in choice. This enhancement is to update the Clothing Allowance Batch job to exclude "Out of State STRTP" placements.

2.5.2 Description of Changes

- a. Update the Foster Care clothing allowance job to exclude "Out of State STRTP" placements when sweeping across the system where program is Foster Care,
When EDBC has the following criteria:
 - i. Aid Code: 40, 42, 43,45,49
 - ii. Placement Type: Out of State STRTP

Note: Batch Clothing Allowance job will have the aid code check as of the first day of the batch run month. If the aid code changes to an eligible aid code for the Foster Care program in the middle of the month, the payment will not be issued in that year.

2.5.3 Execution Frequency

No Change.

2.5.4 Key Scheduling Dependencies

No Change.

2.5.5 Counties Impacted

All Counties

2.5.6 Data Volume/Performance

No Change.

2.5.7 Failure Procedure/Operational Instructions

No Change.

2.5.8 Programs Impacted

Foster Care

2.6 Update Fund Codes for new Placement type

2.6.1 Overview

Create new Fund Codes in LRS for the new placement type of "Out of State STRTP"

2.6.2 Description of Changes

1. Create a DCR to add new fund codes to the following placement type:

Placement Type Code	Placement Type Description
*	Out of State Short-Term Residential Therapeutic Program

*The codes for placement type will be determined during development.

Populate the following common details on the new Fund Codes:

- a. Program: Foster Care
- b. County: 19
- c. Fund:
- d. Dept: CH
- e. Use Dept Object Ind: Y

Note: The JIRA attachment "FUND_CODE for OOS_STRTP" has fund code information for the above placement type.

2.6.3 Programs Impacted

FC

2.7 Counties Interface Testing

2.7.1 Overview

Each CalSAWS county has their separate warrant print & auditor control file exchange process. This section describes the recommendations to perform interface testing for each county file.

2.7.2 Description of Changes

Perform the interface file testing for following counties:

- Los Angeles – eCAPS Special Warrant Request (SWR)

NOTE: Los Angeles County test file will be uploaded to eCAPS test FTP servers.

2.8 Automated Regression Test

2.8.1 Overview

Create new automated regression test scripts to verify the “Out of State Short-Term Residential Therapeutic Program” dropdown option on the Foster Care Resource and Child Placement pages, and the rate treatment during Foster Care EDBC.

2.8.2 Description of Changes

Create automated scripts to verify the following:

1. The new “Out of State Short-Term Residential Therapeutic Program” value appears in the Placement Type dropdown on the Foster Care Resource page in create mode.
2. The new “Out of State Short-Term Residential Therapeutic Program” value appears in the Placement Type dropdown on the Child Placement page when a resource of this type is selected.
3. The Rate Detail page can be saved for this placement type with a Non-Standard Rate.
4. The Rate Detail page can be saved for this placement type with a Standard State Rate and “STRTP” Level Of Service.
5. When running Foster Care EDBC for a OOS STRTP placement with a Non-Standard Rate, the Placement Rate amount is used for the rate calculation, and the Rate Structure is set to “Non-CCR”.

6. When running Foster Care EDBC for a OOS STRTP placement with a Standard State Rate, the in-state STRTP rate amount is used, and the Rate Structure is set to "CCR".

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.4.24	The LRS shall support Vendor-specific and DCFS Programs Foster Care rates that are maintained by the LRS.	A new FC placement type of Out of State Short-Term Residential Therapeutic Program with the appropriate rate options will be added in LRS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-205633

ACL 18-75 Phase IV-Long Term Funding for
Emergency Caregivers with Placements Prior to
RFA Approval

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/06/2020	1.0	Initial Draft	T. Lazio
09/23/2020	2.0	Removed FFA placement type	T.Lazio

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	5
2	Recommendations.....	5
	2.1 Foster Care License Detail.....	5
	2.1.1 Overview	5
	2.1.2 Foster Care License Detail Mockup	6
	2.1.3 Description of Changes	6
	2.1.4 Page Location	6
	2.1.5 Security Updates.....	6
	2.1.6 Page Mapping.....	6
	2.2 Update FC EDBC 5K with Sub Type Code 'EC EA Eligible' Logic	7
	2.2.1 Overview	7
	2.2.2 Description of Changes	7
	2.2.3 Programs Impacted	7
	2.2.4 Performance Impacts	7
	2.3 Create Batch Job That Checks EA NTE Date and Runs EDBC	8
	2.3.1 Overview	8
	2.3.2 Description of Change.....	8
	2.3.3 Execution Frequency.....	8
	2.3.4 Key Scheduling Dependencies	8
	2.3.5 Counties Impacted	9
	2.4 Journal Entry for the new batch sweep job.....	9
	2.5 Update RFA Home Approved Discontinuance NOA Reason	9
	2.5.1 Overview	9
	2.5.2 Update Fragment XDP	10
	2.6 Automated Regression Test.....	10
	2.6.1 Overview	10
	2.6.2 Description of Changes	10
3	Requirements.....	11

1 OVERVIEW

Per ACL 18-75, Emergency Caregiver (EC) funding can be applied to all Resource Family Homes (RFH) who have filed a resource family application (RFA).

Per ACL 19-84, EC funding can be paid to Tribal Specific Homes pending completion of the Tribally Approved Home (TAH) approval process, effective July 1, 2019.

This SCR will accommodate the need of extending EC payments to Tribal Specific Home placements with status of 'Emergency Approval' and all child relationship types for RFH placements with 'Emergency Approval' status.

1.1 Current Design

With the implementation of SCR CA-204665 / CIV-102237, the setting of 5K Sub Type Codes 'EC EA Eligible' and 'EC EA Ineligible' was automated for Relative Home, Non-Relative Extended Family Members (NREFM) and RFH placement types with Home Approval/Foster Care License status of 'Emergency Approval'. For RFH placement types, the 'Care Provider Relationship to Child' had to be either 'Relative Guardian', 'Relative Non-Guardian' or 'NREFM Non Guardian'.

1.2 Requests

1. Expand EC funding to pay 5K 'EC EA Eligible' aid code to the following facility types where License status is 'Emergency Approval':
 - o Tribal Specific Homes
 - o RFH with the following child relationship types:
 - NREFM Guardian
 - Non-Relative Guardian
 - Non-Relative Non-Guardian.
2. Create a batch job that checks if Emergency Assistance (EA) Not To Exceed (NTE) Date has passed on any active FC cases that use 5K aid code and run EDBC to update the aid code (Requirement # 723 on FCED Plan-SCRs with Requirements spreadsheet).

1.3 Overview of Recommendations

1. Update Foster Care License Page for 'Tribal Specific Home' placement types to add 'Emergency Approval' license status option.
2. Update FC EDBC to pay 5K 'EC EA Eligible' aid code to Tribal Specific Homes placement types with Foster Care License status of 'Emergency Approval'.

3. Update FC EDBC to pay 5K 'EC EA Eligible' aid code to remaining relationship types for RFH placement types with 'Emergency Approval' status.
4. Create a daily batch sweep job that checks EA NTE on all active FC cases that use 5K aid code (including 5K with subtype 'EC EA Eligible') and run EDBC on those cases where the NTE has passed since the last time the batch process completed.
5. Update verbiage on RFA 100A discontinuance fragment to match that of the state-provided RFA 100A.

1.4 Assumptions

1. Logic for 5L (FC EC-EA Ineligible) will be implemented in SCR CA-205913 currently scheduled for release 21.03.
2. Good Cause enhancements are planned for CalSAWS/LRS in SCR CA-218186 currently scheduled for release 21.11.
3. The fund codes for 5k aid code with placement types of 'Tribal Specific homes' and 'RFH' are already in the CalSAWS/LRS system.
4. Aid codes and license statuses on existing FC programs with 'Tribal Specific Home' placement types will not be updated by this SCR.
5. If NTE date has passed and the license/home approval status is 'Emergency Approval', the aid code will switch from '5K' with subtype 'EC EA Eligible' to the new aid code '5L' being implemented in SCR CA-205913 currently scheduled for release 21.03.
6. Batch job JB00A112 that generates a task for the worker to take appropriate action on any program that has a foster care child that is about to reach the NTE date on the emergency assistance program will continue to run as scheduled.
7. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
8. NOA generation logic will not be modified with this change. Updates to NOA generation logic pertaining to Aid Code '5L' will be addressed in SCR CA-205913 currently scheduled for release 21.03.
9. LA County DataMart interface will not be impacted with this SCR.
10. The new Batch sweep job will not trigger EDBC for Foster Care cases that have already passed the NTE date prior to implementation of this SCR.

2 RECOMMENDATIONS

2.1 Foster Care License Detail

2.1.1 Overview

The 'Foster Care License Detail' page is used in the CalSAWS/LRS system to store license information for care providers. This page will be updated for 'Tribal Specific Home' placement types to allow the user to specify a status of 'Emergency Approval' when TAH or RFA approval is pending.

2.1.2 Foster Care License Detail Mockup

Foster Care License Detail

*- Indicates required fields

License Type:
Tribal Specific Home

License Status: *
Emergency Approval

License Number: *

State Program Number: . .

Begin Date: *

End Date:

Comments:

Save and Return Cancel

Save and Return Cancel

Figure 2.2.2.1 –Foster Care License Detail Page Mockup -CalSAWS/LRS

2.1.3 Description of Changes

1. Update 'Foster Care License Detail' page for 'Tribal Specific Home' placement types by adding 'Emergency Approval' status option in the License Status dropdown field.

2.1.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: License Information**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.2 Update FC EDBC 5K with Sub Type Code 'EC EA Eligible' Logic

2.2.1 Overview

Update the FC EDBC logic which sets the 5K aid code with 'EC EA Eligible' subtype to include the additional sets of conditions detailed in the following section. All existing conditions that set 5K aid code with 'EC EA Eligible' subtype will remain unchanged.

2.2.2 Description of Changes

1. Update existing FC EDBC logic to add the following conditions for setting the Sub Type Code of 'EC EA Eligible' with aid code of 5K:
 - a. For Resource Family Home (RFH) placement types with license status of 'Emergency Approval' include the following child relationship types:
 - i. NREFM Guardian
 - ii. Non-Relative Guardian
 - iii. Non-Relative Non-Guardian
 - b. The placement type, with a begin date on or after July 1, 2019, is one of the following combinations:

Placement Type	License Status	Benefit period <u>has not exceeded the EA Not to Exceed (NTE) date on the Placement Authority page</u>*	'Was the EA1 application approved?' on the Placement Authority page
Tribal Specific Home	Emergency Approval	Yes	Yes

* If the EA NTE date ends in middle of the benefit month and license status is 'Emergency Approval', the system can create two aid code records in the same benefit month (5K with Sub Type Code 'EC EA Eligible' and 5L).

2.2.3 Programs Impacted

Foster Care

2.2.4 Performance Impacts

N/A

2.3 Create Batch Job That Checks EA NTE Date and Runs EDBC

2.3.1 Overview

Create a daily batch sweep job that triggers EDBC on any active Foster Care cases that use 5K aid code (including 5K with subtype 'EC EA Eligible') where the EA NTE Date has passed since the last time the batch job completed.

2.3.2 Description of Change

Create a new county configurable daily batch sweep job that triggers EDBC for the current and come-up months on any active Foster Care programs and create a journal entry (refer to section 2.4) when all the following conditions are met-

- a. FC program is 'Active' as of the batch date.
- b. FC program person(s) is 'Active' as of the batch date
- c. Aid code for the Foster Care program is '5K' as of the batch date.
- d. The question 'Was the EA1 application approved?' in the Emergency Assistance(EA) section on the active Placement Authority is 'Yes'.
- e. The 'Not To Exceed' Date in the Emergency Assistance(EA) section on the active Placement Authority has passed since the last time the batch job ran successfully.

Emergency Assistance (EA)	
Was the EA1 application approved?	Yes
Date of Risk: *	05/01/2019
Not to Exceed Date: *	04/30/2020

Note: if the new batch sweep job is triggered on or after the ten day cut off batch EDBC will be triggered for the current month and following two months(come-up month and the month following the come-up month).

2.3.3 Execution Frequency

Daily (except batch holidays)

2.3.4 Key Scheduling Dependencies

This Job will run before EDBC is triggered

2.3.5 Counties Impacted

LA County only

CIV and CalWIN counties can opt-in to run this job at the time of migration.

2.4 Journal Entry for the new batch sweep job

Journal Entry	Description
New/Update	<i>New</i>
Journal Category	<i>All</i>
Journal Type	<i>Batch EDBC</i>
Short Description	<i>Batch EDBC ran for <Month Year>.</i>
Long Description	<i>Batch EDBC ran for <Month Year>. Batch EDBC processed for the FC program for following reasons: Emergency Assistance 'Not To Exceed' date has passed.</i>
Trigger Condition	<i>When a FC EDBC runs on the case</i>

2.5 Update RFA Home Approved Discontinuance NOA Reason

2.5.1 Overview

One of the Discontinuance Fragments that can generate with the RFA 100A (9/18) when it is generated via EDBC does not match the state-provided verbiage. This change will update the verbiage to match that of the state-provided RFA100A.

Reason Fragment Name and ID:

RSN_TN_RFA_100A_VEND_OR_HOME_APPRD_T402

ID: 7544

State Form/NOA: RFA 100A (9/18)

Current NOA Template: FC_NOA_TEMPLATE (ID: 3030)

Current Program(s): Foster Care

Current Action Type: Discontinuance

Current Fragment Level: Person

Currently Repeatable: N

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English, Spanish

2.5.2 Update Fragment XDP

Updated Languages:

English (Spanish fragment already up to date)

Description	Existing Text	Updated Text	Formatting*
Static	The RFA Application was approved, and the child now may be eligible for either the Aid to Families with Dependent Children-Foster (AFDC-FC) or the Approved Relative Caregiver (ARC) Funding program payments. Contact [APPROPRIATE OFFICE] if you have any funding related questions.	The RFA Application was approved, and the child is now eligible for either the Aid to Families with Dependent Children-Foster (AFDC-FC) or the Approved Relative Caregiver (ARC) Funding program payments. You should continue receiving funding without delay. Contact [Appropriate Office] immediately if you stopped receiving funding at the time the RFA Application was approved.	Arial, Size 10

2.6 Automated Regression Test

2.6.1 Overview

Create new automated regression test scripts to cover the new Emergency Approval option for the 'Tribal Specific Home' placement types, and positively test the associated 5K aid code changes.

2.6.2 Description of Changes

For Placement Type 'Tribal Specific Home':

- i. Verify that a License Status of 'Emergency Approval' can be selected on the Foster Care License Detail page.
- ii. Verify that Aid Code 5K with sub type code 'EC EA Eligible' is granted by Foster Care EDBC for a program with this Placement Type and License Status, and each of the following Relationship types:
 1. NREFM Guardian
 2. Non-Relative Guardian
 3. Non-Relative Non-Guardian

Note: Only the positive EDBC tests are in scope, where the 'Not to Exceed' date is not exceeded, and the EA1 application is approved.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.4.7	The LRS shall be able to identify and pay for a substitute service if a Vendor's license is not valid for the selected service.	Expanding emergency caregiver funding to additional placement types with pending RFAs and Home Approval/Foster Care License status of 'Emergency Approval'.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-205913

ACL 18-75 Add 5L Aid Code for FC Emergency
Assistance EC Ineligible Cases

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/03/2020	1.0	Initial Doc	T. Lazio
02/20/2020	1.1	Added Correspondence Changes	Bashir, I
04/27/2020	2.0	<p>The following updates were made based on committee feedback:</p> <ul style="list-style-type: none"> - Assumption 6 added in Section 1.4 - TANF Indicator value updated in Section 2.1.2 - Overview in Section 2.2.1 updated. - Description of Changes updated in Section 2.5.2 - 'Annual' added to Sections 2.8, 2.8.1 and 2.8.2 - Note regarding mockup attachment added to Sections 2.12.1 and 2.13.1 	T.Lazio N. Chereddy S. Garg
05/05/2020	3.0	<p>The following updates were made based on committee feedback:</p> <ul style="list-style-type: none"> - Assumption 8 added in Section 1.4 - Updated table in Section 2.2.3, item 2 a. - Added updated Fund Codes spreadsheet with LRS corrections 	T. Lazio
07/22/2020	4.0	<p>The following updates have been made to SCR:</p> <ul style="list-style-type: none"> - SCR is CalSAWS/LRS only 	T.Lazio H. Suksanti

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		<ul style="list-style-type: none"> - 5L aid code will be applied to Tribal Specific Homes and Foster Family Agency placement types. - 5L aid code will be applied to all relationship types for RFH placement types. - Removed C-IV updates from Sections 2.2.3 and 2.1.2. -Removed C-IV updates from Sections 2.6 - Added Assumptions 9&10 	
08/17/2020	5.0	<p>The following updates were made based on committee feedback:</p> <ul style="list-style-type: none"> - EC-EA Tracking Report Section 2.15.4. updated - Updated Assumptions 1.4-11 	Greg Deogracia
09/08/2020	6.0	Updated Correspondence Sections 2.12.2.1 and 2.13.2	T.Lazio P.Sridharan
09/23/2020	7.0	<ul style="list-style-type: none"> - Removed FFA placement type - Added committee clarifications to verbiage to the following sections: <ul style="list-style-type: none"> o Overview o 1.2 o 1.3 o 2.1.1 o 2.2.1 o 2.2.3 	T.Lazio

Table of Contents

1	Overview	8
1.1	Current Design.....	8
1.2	Requests.....	8
1.3	Overview of Recommendations.....	8
1.4	Assumptions	9
2	Recommendations.....	10
2.1	Add Aid Code 5L	10
2.1.1	Overview	10
2.1.2	Description of Changes	10
2.1.3	Programs Impacted	12
2.2	Update FC EDBC To Use Aid Code 5L	12
2.2.1	Overview	12
2.2.2	Foster Care EDBC Example	12
2.2.3	Description of Changes	12
2.2.4	Programs Impacted	13
2.3	Update Foster Care Aid Code Override Detail Page Sub Type Codes	13
2.3.1	Overview	13
2.3.2	Override EDBC Foster Care Aid Code Override Detail Page Example....	14
2.3.3	Description of Changes	14
2.3.4	Programs Impacted	14
2.4	Update Manual Foster Care EDBC Sub Type Codes	14
2.4.1	Overview	14
2.4.2	Manual EDBC Foster Care Aid Code Override Detail Page Example	15
2.4.3	Description of Changes	15
2.4.4	Programs Impacted	15
2.5	Update 5K EA Aid Code Logic.....	15
2.5.1	Overview	15
2.5.2	Description of Changes	15
2.5.3	Programs Impacted	16
2.6	Fund Code Determination	16
2.6.1	Overview	16
2.6.2	Description of Changes	16

2.7 Annual Clothing Allowance Batch	17
2.7.1 Overview	17
2.7.2 Description of Change	17
2.7.3 Execution Frequency.....	17
2.7.4 Key Scheduling Dependencies	17
2.7.5 Counties Impacted	17
2.7.6 Data Volume/Performance	17
2.7.7 Failure Procedure/Operational Instructions.....	17
2.8 Counties Interface Testing.....	17
2.8.1 Overview	17
2.8.2 Description of Changes	17
2.9 Create a CTCR to add 5L aid code into the existing FC – MEDS Aid Code segment.	18
2.9.1 Overview	18
2.9.2 Description of Change	18
2.9.3 Counties Impacted	18
2.10 Add 2 new MEDS Alerts ID 9579 and 9580.....	18
2.10.1 Overview	18
2.10.2 Description of Change	18
2.10.3 Counties Impacted	19
2.11 Correspondence: Update the Existing Approval of Emergency Caregiver Funding Foster Care NOA Reason Fragment.....	20
2.11.1 Overview	20
2.11.2 Description of Change	21
2.12 Correspondence: Update the Existing Discontinuance of Emergency Caregiver Funding Foster Care NOA Reason Fragment.....	21
2.12.1 Overview	21
2.12.2 Description of Change	22
2.13 Correspondence: Regression Test Foster Care NOA Fragments.....	23
2.13.1 Overview	23
2.13.2 Description of Change	23
2.14 Report.....	24
2.14.1 Overview	24
2.14.2 Recommendations:.....	24
2.14.3 EC-EA Tracking Report	25
2.14.4 Report Location	25

2.15	Automated Regression Test.....	25
2.15.1	Description of Changes	25
2.15.2	Description of Changes	25
3	Supporting Documents	26
4	Requirements.....	26
4.1	Project Requirements.....	26

1 OVERVIEW

Per ACL 18-75, all counties must provide payment equivalent to the basic level rate for a resource family to the emergency caregiver for children who are determined to be ineligible for the Emergency Assistance (EA) Program (5K EC EA Ineligible). A new aid code will be determined for cases that are ineligible for Emergency Caregiver (EC) funding through the EA program and, in the interim, Aid Code 5K EC EA Ineligible would be used to track these cases.

Per ACL 19-24, Aid Code 5L will be used to track cases that are ineligible for EC funding through the EA program, effective March 2019. This SCR will add and implement the new Foster Care (FC) aid code 5L in CalSAWS/LRS.

1.1 Current Design

Per ACL 18-75 and the implementation of SCR CA-203207 / CIV-101516, Sub Type Codes 'EC EA Eligible' and 'EC EA Ineligible' were added to the system in order to differentiate the 5K aid code used for EC cases that are EA eligible or EA ineligible. SCR CA-204665 / CIV-102237 updated the FC EDBC to automate the setting of these two sub type codes.

NOTE: Please refer to the attached Emergency Approval Chart.xlsx file under **Section 3.0** for Emergency Approval 5K Aid Code details

Existing Approval NOAs in CalSAWS/LRS have logic to generate for the existing 5K aid code.

1.2 Requests

Per ACLs 19-24 and 19-84, add aid code 5L for FC EC EA ineligible cases and update FC EDBC to automate the setting of 5L aid code instead of 5K with 'EC EA Ineligible' sub type code, which will include Tribal Specific Homes placement types as well as all child relationship types for RFH placements. Also, add aid code 5L to the existing EC-EA Tracking Report and exclude 5L aid code from Clothing Allowance batch jobs.

1.3 Overview of Recommendations

1. Add new 5L Aid Code for FC EC cases not eligible for federal EA funding.
2. Update FC EDBC to use Aid Code 5L instead of 5K with Sub Type Code of 'EC EA Ineligible' which will include Tribal Specific Homes placement types as well as all child relationship types for RFH placements.
3. Update Foster Care Aid Code Override Detail Page to Not Allow Selection of Sub Type Code 'EC EA Ineligible'. Aid code '5L' will be available as an option after this SCR is implemented.

4. Update Manual Foster Care EDBC to Not Allow Selection of Sub Type Code 'EC EA Ineligible'. Aid code '5L' will be available as an option after this SCR is implemented.
5. Update 5K EA Aid Code logic to not set 5K Aid Code when Child Placement facility has already received EC funding and the RFA license is approved even if the NTE date has not been reached.
6. Add new Fund Codes in CalSAWS to store the accounting string information for all CalSAWS Counties for 5L Aid Code.
7. Exclude 5L aid code from Clothing Allowance batch jobs.
8. Create a CTCR to add 5L aid code into the existing FC – MEDS aid code segment.
9. Add two MEDS alerts into The System (External #9579 and 9580).
10. Add the 5L aid code data element to the existing EC/EA tracking report.
11. Update EC-EA Tracking Report Fields to use Beginning Date of Placement instead of Beginning Date of 'Emergency Approval' license.
12. Update the NOA generation logic for existing NOAs in CalSAWS/LRS to include the new 5L approval code.

1.4 Assumptions

1. This SCR is CalSAWS/LRS only. The C-IV counties will inherit this functionality upon migration.
2. Existing FC programs with Aid Code '5K' + Sub Type 'EC EA Ineligible' in a March 2019 benefit month or later will not be updated by this SCR. However, if EDBC is re-run for one of those months after this SCR is implemented, the aid code will become 5L (assuming no other factors have changed on the case).
3. No updates to the regulations, variable population, or text of existing Foster Care NOAs will be made with this effort.
4. No additional translations for the existing Foster Care NOAs will be added with this effort.
5. The CalSAWS/LRS will not default the pay code for 5L Aid Code. In CalSAWS/LRS, the Pay Code field is non-mandatory on EDBC Summary page and it would be up to the user's discretion to select a Pay Code for 5L or not. The funding for benefits mapped to 5L aid code will be derived based on aid code and Placement Type.
6. There will be no change to the MEDS Interface on how to determine an Eligibility Status Action Code (ESAC). For example, when a Foster Care case has an aid code change from 5K to 5L or from 5L to a different Foster Care aid code, MEDS Interface job uses ESAC code of 2 or 7 since both aid codes are in the same MEDS Foster Care segment. ESAC of 2 - Active Client Eligible Update on Continuing Eligibility Periods. ESAC of 7 - Active Client Eligible Update on Closed Eligibility Periods.
7. NA BACK 9 will not be updated with this SCR. All the forms and NOAs will have the existing NA BACK 9 in the system.
8. If the license status is 'Emergency Approval', placement authority is "Protective Custody", and a WIC code is populated in the legal authority field, the 5L aid code will be assigned.

9. The 'Foster Care License Detail' page for 'Tribal Specific Home' placement types will be updated to allow the user to specify a status of 'Emergency Approval' with SCR CA-205633 currently scheduled for release 21.03.
10. Foster Care Integrated Reports will be updated in CalSAWS/LRS with SCR CA-216018 DDID 2191 currently scheduled for release 21.01.
11. IEVS abstracts will be updated to include Foster Care Aid Codes as part of SCR CA-216357 DDID 1967 currently scheduled for release 21.03.

2 RECOMMENDATIONS

2.1 Add Aid Code 5L

2.1.1 Overview

Per ACL 19-24, Aid Code 5L will be added and used for those Foster Care EC cases not eligible for federal EC EA Eligible funding effective March 2019.

2.1.2 Description of Changes

Add new 5L Aid Code to Code Table 184 effective March 01, 2019, as follows:

CT 184 Field	Value
CODE_NUM_IDENTIF	5L
SHORT_DECODE_NAME	5L - FC EC-EA Ineligible
LONG_DECODE_NAME	Emergency Caregiver - Emergency Assistance Ineligible - Foster Care
CODE_DESCR	Emergency Caregiver - Emergency Assistance Ineligible - Foster Care
ORDER_BY_NUM	0
BEG_DATE	03/01/2019
END_DATE	12/31/9999
SOC	N/A
Eligibility Medi-Cal Benefit Categorization	blank
NOA Grouping	blank

CT 184 Field	Value
Fed/Non-Fed	NF
C-IV Program	FC
TANF Indicator	N
TANF Priority	10
NOA Hierarchy	blank
Cash Aid Category	blank
Cash Aid Federal Funding	blank
Cash Aid State Funding	blank
Cash Aid Mixed Funding	blank
Time Limit Indicator	blank
MEDS Aid Code Segment	FC
Second C-IV Program	blank
Funding Group Type Code	blank
Benefit Type	blank
Family Reunification	blank
Valid for Override	Y
MAGI Aid Code	blank
LA County Legacy	N/A
Packet Type 22 S	blank
MSP Aid Code	N
LTC Aid Code	N
Non-MAGI Aid Code	N
ARC Aid Code	blank
WDTIP Fed/State only Ind	blank

2.1.3 Programs Impacted

FC

2.2 Update FC EDBC To Use Aid Code 5L

2.2.1 Overview

SCR CA-204665 / CIV-102237 updated FC EDBC to set the Sub Type Code of 'EC EA Ineligible' with aid code of 5K when the FC child is not eligible for EC EA funding and license status is "Emergency Approval". With the addition of aid code '5L' based on ACL 19-24, the FC EDBC will be updated to set Aid Code 5L with no Sub Type Code instead of setting aid code '5K' with Sub Type Code 'EC EA Ineligible' for EC EA ineligible FC cases.

2.2.2 Foster Care EDBC Example

Aid Code Information						
Program Aid Code *	Sub Type Code	Begin Date	End Date	Rate Structure	Overridden Aid Code	
5 L - FC EC-EA Ineligible		02/01/2020		CCR	Edit	

Figure 2.2.2.1 – EDBC Detail with Aid Code 5L After SCR is Implemented

2.2.3 Description of Changes

- 1) Update the FC EDBC to no longer set Aid Code '5K' with Sub Type Code of 'EC EA Ineligible' when running for a benefit month of March 2019 or later.
- 2) Update the FC EDBC to set the aid code '5L' when running for a benefit month of March 2019 or later, if the following conditions are met:
 - a. The placement type, relationship, and license/home approval combination is one of the following:

Placement Type	Care Provider Relationship to Child	License Status	Home Approval Status
Resource Family Home (RFH)	<ul style="list-style-type: none"> • Relative Guardian • Relative Non-Guardian • NREFM Non Guardian • NREFM Guardian 	Emergency Approval	N/A

Placement Type	Care Provider Relationship to Child	License Status	Home Approval Status
	<ul style="list-style-type: none"> • Non-Relative Guardian • Non-Relative Non-Guardian 		
Relative Home	N/A	N/A	Emergency Approval
Nonrelative Extended Family Member Home (NREFM)	N/A	N/A	Emergency Approval
Tribal Specific Home	N/A	Emergency Approval	N/A

- b. And one of the following condition is met:
- i. 'Was the EA1 application approved?' is blank in the EA section on the Placement Authority page.
 - ii. 'Was the EA1 application approved?' is 'No' in the EA section on the Placement Authority page.
 - iii. 'Was the EA1 application approved?' is 'Yes' and the benefit period is after the EA Not to Exceed (NTE) date on the Placement Authority page.

2.2.4 Programs Impacted

FC

2.3 Update Foster Care Aid Code Override Detail Page Sub Type Codes

2.3.1 Overview

The Sub Type Codes available for the user to choose on the Foster Care Aid Code Override Detail page when overriding a FC EDBC should no longer include 'EC EA Ineligible'. After this change is implemented, a user would select Aid Code 5L with no Sub Type Code instead.

2.3.2 Override EDBC Foster Care Aid Code Override Detail Page Example

Foster Care Aid Code Override Detail

EDBC Override Reason: *

System Aid Code:
5K - FC-EA

Aid Code: *

Cash Benefits:
Yes

Sub Type Code:
AB 110 EA
EC EA Eligible re: *

Begin Date: * 04/01/2020

End Date:

CCR

Save and Return Cancel

Figure 2.3.2.1 – EDBC Override Foster Care Aid Code Override Detail Page After SCR is Implemented With No ‘EC EA Ineligible’ option

2.3.3 Description of Changes

Update the Foster Care Aid Code Override Detail page when overriding FC EDBC to not populate the Sub Type Code ‘EC EA Ineligible’ option in the dropdown.

2.3.4 Programs Impacted

FC

2.4 Update Manual Foster Care EDBC Sub Type Codes

2.4.1 Overview

The Sub Type Codes available for the user to choose on the Foster Care Aid Code Override Detail page when performing a Manual FC EDBC should no longer include ‘EC EA Ineligible’. After this change is implemented, a user would select Aid Code 5L with no Sub Type Code instead.

2.4.2 Manual EDBC Foster Care Aid Code Override Detail Page Example

Foster Care Aid Code Override Detail

Save and Return Cancel

Aid Code: *
- Select -

Cash Benefits:
- Select -

Sub Type Code:
AB 110 EA
EC EA Eligible
- Select -

Begin Date: *
[Date Picker]

End Date:
[Date Picker]

Save and Return Cancel

Figure 2.4.2.1 – Manual EDBC Foster Care Aid Code Override Detail Page After SCR is Implemented With No 'EC EA Ineligible' option

2.4.3 Description of Changes

Update the Foster Care Aid Code Override Detail page on the Manual EDBC to not populate the Sub Type Code 'EC EA Ineligible' option in the dropdown.

2.4.4 Programs Impacted

FC

2.5 Update 5K EA Aid Code Logic

2.5.1 Overview

ACL 18-75 states that “once the RFA application is approved, counties must shift the funding source to Aid to Families with Dependent Children-Foster Care (AFDC-FC) or the ARC program, as appropriate and consistent with existing eligibility requirements”. Therefore, CalSAWS/LRS must be updated to no longer pay Emergency Assistance Funding (Aid Code 5K EA) on a placement that previously received Emergency Caregiver Funding (5K - EC EA Eligible, 5K - EC EA Ineligible, or 5L) after the RFA license is approved.

2.5.2 Description of Changes

Update FC EDBC logic when running EDBC for a benefit month of March 2019 or later to not set aid code 5K-FC EA (traditional Emergency Assistance funding with no FC Aid Code Subtype) when one of the following combinations of Aid Code and Aid Code Subtype Code was paid at any time in the 12 months prior to the benefit month on the Child Placement being processed:

Aid Code	FC Aid Code Subtype Code
5L - FC EC-EA Ineligible	Blank
5K - FC-EA	EC EA Eligible
5K - FC-EA	EC EA Ineligible

This logic will need to look for aid codes on EDBC's back to the begin date of the Child Placement being processed, but not more than 12 months in the past.

If there are multiple consecutive Child Placement records for the same resource and there is no gap in days between them, this logic will need to treat the records that precede the current one as part of the current placement and look for the above aid codes back as far as the earliest Child Placement begin date, but not more than 12 months prior to the benefit month.

Note: In LRS/CalSAWS, multi-month EDBC runs are possible. This logic will also need to consider prior months within the current multi-month EDBC run to see if they meet the above criteria when determining eligibility to a 5K-FC EA Aid Code.

2.5.3 Programs Impacted

FC

2.6 Fund Code Determination

2.6.1 Overview

Currently in the System, fund codes are used to store the accounting string information for a County. This information helps in claiming the funding for County from State (Federal/Non-Federal). This update will add the appropriate funding codes and accounting strings for the new EOA payments for all 40 counties.

2.6.2 Description of Changes

Add the new Fund Codes in the system to store the accounting string information for all CalSAWS Counties for 5L Aid Code.

NOTE: Please refer to the file "Fund Code Map.xlsx" attached to JIRA for the appropriate fund codes and accounting string information for each county.

2.7 Annual Clothing Allowance Batch

2.7.1 Overview

The Annual Clothing Allowance Batch creates the authorization records that allow Foster Children to receive the annual clothing allowance. This update is to exclude cases with 5L aid code from the clothing allowance batch.

2.7.2 Description of Change

Update the Annual clothing allowance batch to exclude cases with 5L aid code.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

No Change.

2.7.5 Counties Impacted

All Counties.

2.7.6 Data Volume/Performance

No Change.

2.7.7 Failure Procedure/Operational Instructions

No Change.

2.8 Counties Interface Testing

2.8.1 Overview

Each CalSAWS county has their separate warrant print & auditor control file exchange process. This section describes the recommendations to perform interface testing for each county file.

2.8.2 Description of Changes

Perform the interface file testing for following counties:

- Los Angeles – eCAPS Special Warrant Request (SWR)
- Merced – FIRMS

- Riverside – OASIS
- San Bernardino – Warrant Print
- Migration – Auditor Controller File

NOTE: Except for Los Angeles County and San Bernardino County, all interface test files will be uploaded to the Web Portal under System Changes > SCR and SIR Lists > 2020 > SCR CA-205913. San Bernardino County test files will be uploaded to their production FTP servers. Los Angeles County test file will be uploaded to eCAPS test FTP servers.

2.9 Create a CTCR to add 5L aid code into the existing FC – MEDS Aid Code segment.

2.9.1 Overview

MEDS Interface uses Code Category 184 (Aid Code) – MEDS Aid Code Segment to identify the correct ESAC code when sending transaction to MEDS. Since 5L aid code is for Foster Care program, a CTCR will be created to add the aid code into the existing FC segment.

2.9.2 Description of Change

Create a CTCR (CT184 – MEDS Aid Code Segment) to add 5L aid code into FC segment. Note: Section 2.1 already included the change on the CTCR.

2.9.3 Counties Impacted

All Counties.

2.10 Add 2 new MEDS Alerts ID 9579 and 9580.

2.10.1 Overview

This SCR will setup the External # 9579 and 9580 alerts in The System so user can view those alerts from the application. The new alerts are part of Change Cycle Letter 442.

2.10.2 Description of Change

Add the following alerts into the System.

1. Alert #9579 (Internal #0815).

Alert Description (TITLE_DESCR)	APPROACHING END OF 6TH MONTH, RFA REVIEW NEEDED
Explanation (TEXT_DESCR)	N/A.
Automation	No.
Task Creation	No.
Alert Type	Action
Action (ACTN_DESCR)	The Eligibility Worker must take action to review the status of RFA application 30 days prior to a beneficiary reaching their 6th month on aid code 5L.

2. Alert #9580 (Internal #0817).

Alert Description (TITLE_DESCR)	APPROACHING END OF 12TH MONTH, CHECK FOR PENDING RFA
Explanation (TEXT_DESCR)	N/A.
Automation	No.
Task Creation	No.
Alert Type	Action
Action (ACTN_DESCR)	The Eligibility Worker must take action and review the status of RFA application 60 days prior to a beneficiary reaching their 12th month on aid code 5L and transition beneficiary into appropriate Medi-Cal aid code.

Note: SCR CA-210615 will add an ability to turn on/off MEDS alerts. If this SCR is implemented on the same time with CA-210615 item or before, Counties will have an ability to turn on/off these 2 new alerts.

2.10.3 Counties Impacted

All Counties.

2.11 Correspondence: Update the Existing Approval of Emergency Caregiver Funding Foster Care NOA Reason Fragment

2.11.1 Overview

Currently CalSAWS/LRS has an Approval Reason fragment that generates for the existing 5K aid code. This logic needs to be updated to generate for the new 5L aid code.

Fragment Name and ID:

CalSAWS/LRS : FC_AP_RFA_APPROVAL_T903 (Fragment ID:7542),

Note: Mockups attached to Mockups.zip folder in JIRA and SharePoint.

Current NOA Template:

CalSAWS/LRS : FC_NOA_TEMPLATE (Fragment ID: 3030)

Current Program(s): Foster Care

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

Existing Languages: English and Spanish

Existing Emergency Caregiver Funding Approval NOA Reason fragment Text:

"For caregivers of children placed on an emergency basis or based on a compelling reason prior to and pending Resource Family Approval (RFA).

The county has approved the child

<CHILD_NAME>

for cash aid under the Emergency Caregiver Funding program. The child was placed in your home on <PLACEMENT_DATE> and the RFA 01A has been submitted.

The cash aid payment for your first month of aid is based on the date the child was placed in your home.

The cash aid payment for your first month of aid is <AMT>.

The cash aid payment for your first month of aid may only be for a part of the month based on the date the child was placed with you.

Thereafter your monthly cash aid amount will be <ONGOING_AMT>."

2.11.2 Description of Change

The NOA generation logic of the existing Reason fragment will be updated to generate for the 5L aid code. Note: No updates to the existing text, regulations, or variable population will be made with this effort.

2.11.2.1 Update Approval Reason Fragment Generation

Update the logic that generates the existing Approval Reason Fragment for the Foster Care program for the 5L aid code.

Update the logic (RomDataHelper.hasFcEmergencyApprovalAidCode) that determines if the program has a Foster Care Approval Aid Code to return 'true' when the one of the following is true:

- The Aid Code is '5K' and
 - The subtype code is 'EC EA Ineligible' (Note: this will only be true for benefit months run prior to March 2019)

OR

- The subtype code is 'EC EA Eligible'
- The Aid Code is '5L'

Note: The logic (RomDataHelper.hasFcEmergencyApprovalAidCode) is shared by several NOA fragments. See the Correspondence Recommendations in this effort for regression testing (Recommendation 2.13) and additional Fragment (Recommendation 2.12) that generates based on this logic.

2.12 Correspondence: Update the Existing Discontinuance of Emergency Caregiver Funding Foster Care NOA Reason Fragment

2.12.1 Overview

Currently CalSAWS/LRS has a Discontinuance Reason fragment that generates for the existing 5K aid code. This logic needs to be updated to generate for the new 5L aid code.

Fragment Name and ID:

LRS/CalSAWS : FC_TN_RFA_100A_PLACEMT_END_T401 (Fragment ID: 7543),

Note: Mockups attached to Mockups.zip folder in JIRA and SharePoint.

Current NOA Template:

LRS/CalSAWS : FC_NOA_TEMPLATE (Fragment ID: 3030)

Current Program(s): Foster Care

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

Existing Languages: English and Spanish

Existing Emergency Caregiver Funding Discontinuance NOA Reason fragment Text:

"The child is no longer placed with you."

2.12.2 Description of Change

The NOA generation logic of the existing Reason fragment will be updated to generate for the 5L aid code. Note: No updates to the existing text, regulations, or variable population will be made with this effort.

2.12.2.1 Update Discontinuance Reason Fragment Generation

Update the logic that generates the existing Discontinuance Reason Fragment for the Foster Care program for the 5L aid code for the following NOAs:

- FC_TN_RFA_100A_PLACEMT_END_T401
- FC_TN_RFA_100A_VEND_OR_HOME_APPRD_T402
- FC_TN_RFA_100A_VEND_OR_HOME_NOT_APPRD_T403

Update the logic to generate Discontinuance Reason Fragment when the following conditions are true:

- Program Type is Foster Care.
- Previous Aid Code is one of the following:
 - '5K' with subtype code "EC EA Eligible"
 - '5K' with subtype code "EC EA Ineligible"
 - '5L'
- Current Aid Code is neither of the following
 - '5K' with subtype code "EC EA Eligible"
 - '5K' with subtype code "EC EA Ineligible"
 - '5L'

2.13 Correspondence: Regression Test Foster Care NOA Fragments

2.13.1 Overview

Existing NOA logic is being updated for the new '5L' aid code (See Recommendations 2.11 and 2.12). The logic being updated is shared with other NOA fragments.

2.13.2 Description of Change

Regression test the following NOA fragments to confirm that they continue to generate as they did previous to this effort. These fragments use the existing logic that is being updated in Recommendations 2.11 and 2.12 to determine when not to generate or when to generate.

Fragment Name and ID	Shared Logic
FC_AP_ARC_T500 (Fragment ID: 7455)	RomDataHelper.hasFcEmergencyApprovalAidCode And RFA_DISCONTINUANCE_ACTION
FC_DN_ARC_T501 (Fragment ID: 7456)	RomDataHelper.hasFcEmergencyApprovalAidCode And RFA_DISCONTINUANCE_ACTION
FC_DN_NOT_SUFFICIENT_ INFO_FOR_LINKAGE_T003 (Fragment ID: 6067)	RomDataHelper.hasFcEmergencyApprovalAidCode And RFA_DISCONTINUANCE_ACTION

2.14 Report

2.14.1 Overview

This section will outline recommendations for report enhancement related to the introduction of the 5L aid code. (Reference section 1.2).

Note: Base criteria of the reports will not change.

2.14.2 Recommendations:

Add batch process properties for the following reports to run in an instance of each report for the 5L aid code.

Report	Reports Description
Integrated Payroll Summary Report	Provides detail issuance information and summary data for Foster Care/ARC.
Integrated Payroll Foster Care Issuance Detail Claiming Report	Provides detailed information on all Foster Care payments issued for the month.
Integrated Payroll Foster Care Issuance Detail Claiming Report By Case	Provides detail information on all Foster Care payments issued by case for the month.
Main Payroll Benefit Issuance Warrant Register	Provides benefit issuance warrant transaction information for Foster Care/ARC.
Main Payroll Benefit Issuance Direct Deposit Register	Provides benefit issuance Direct Deposit transaction information.

2.14.3 EC-EA Tracking Report

Reports	Reports Description
EC-EA Tracking Report	Identifies the number of days and the number of Foster Care cases authorized to receive EC payments.

- a) Update EC-EA Tracking report to include information for cases with a 5L aid code.
- b) Update EC-EA Tracking Report Fields:
- **90+ Days Elapsed** Modify logic from the License Status Begin Date to Placement Begin Date.
 - **180+ Days Elapsed** Modify logic from the License Status Begin Date to Placement Begin date.
 - **365+ Days Elapsed** Modify logic from the License Status Begin Date to Placement Begin Date.
 - Modify Column Y Header from **Days Elapsed from License Begin Date** to **Days Elapsed from Placement Begin Date**.

2.14.4 Report Location

- **Global:** Reports
- **Local:** On Request
- **Task:** Case Activity

2.15 Automated Regression Test

2.15.1 Description of Changes

An automated test script was previously created to cover an Aid Code 5K 'EC EA Ineligible' scenario. This script should be updated to match the Aid Code 5L implementation, and renamed accordingly.

2.15.2 Description of Changes

Update and rename the Foster Care Aid Code 5K 'EC EA Ineligible' automated script to match the Aid Code 5L functionality.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	Emergency Approval Chart	 Emergency%2

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.4.7	The LRS shall be able to identify and pay for a substitute service if a Vendor's license is not valid for the selected service.	A new Aid Code 5L will be added and used by the FC ED BC for cases that are ineligible for EA funding through the EA program and have a Foster Care License status of Emergency Approval.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-210663

Updates to the CF Expedited and
Recertification Approval NOA Message

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	James Tran
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/02/2020	1.0	Initial Version	James Tran

Table of Contents

1 Overview 4
1.1 Current Design..... 4
1.2 Requests..... 4
1.3 Overview of Recommendations..... 4
1.4 Assumptions 4
2 Recommendations..... 5
2.1 Update CalFresh Approval Message Fragment 5
 2.1.1 Overview 5
 2.1.2 Description of Change..... 5
2.2 CalSAWS/LRS only: Update CalFresh Approval SUAS Message Fragment 6
 2.2.1 Overview 7
 2.2.2 Description of Change..... 7
3 Supporting Documents 8
4 Requirements..... 8
4.1 Project Requirements..... 8
4.2 Migration Requirements..... 8
5 Migration Impacts 9
6 Outreach.....10
7 Appendix.....10

1 OVERVIEW

The purpose of this SCR is to update incorrect and outdated verbiage on two CalFresh notices of Action. The verbiage is to be updated to match the most recent version released by the state.

1.1 Current Design

1. The Recertification Approval NOA currently has verbiage regarding dependent care.
2. The Expedited Approval NOA currently has the verbiage of the SUAS message from version 04/15.

1.2 Requests

1. Update the Recertification Approval NOA message. Remove verbiage regarding dependent care.
2. Update all CalFresh Approval NOAs to reflect the latest CF 377.1 version 6/19.

1.3 Overview of Recommendations

1. Update the CalFresh Approval Message (CF_AP_MESSAGE1) by removing the verbiage, "Remember to report dependent care cost each month and shelter and medical cost each month they change."
2. Update the CalFresh Approval SUAS Message (CF_AP_MESSAGE5) by replacing the whole verbiage with the verbiage found in the latest version of CF 377.1 version 6/19.

1.4 Assumptions

1. The verbiage does not exist in C-IV, so the update will be CalSAWS/LRS only.
2. No updates to existing NOA generation. This update will only change the verbiage of the existing NOA fragments.
3. The form version of this form has the verbiage updated. Only the NOA fragments need to be updated.

2 RECOMMENDATIONS

2.1 Update CalFresh Approval Message Fragment

2.1.1 Overview

The existing CalFresh Approval Message based on the CF 377.1 in CalSAWS/LRS is out of date. With this effort, the fragment will be updated with the latest version published by the state (06/2019).

Message Fragment Name and ID: CF_AP_MESSAGE1 (ID: 5000)

State Form/NOA: CF 377.1 (current system version 4/15)

Current Program(s): CalFresh

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Existing Languages:

English and Spanish

2.1.2 Description of Change

This recommendation will update the CalFresh Approval Message Fragment to match the newest State version (6/2019).

2.1.2.1 Update CalFresh Approval Message Fragment XDP

The following verbiage will be updated to match the CF 377.1 (06/2019) version.

Updated Languages:

English and Spanish

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	For CalFresh, your family size is <AssistanceUnitSize>. Your IRT is <CurrentIrtLimit>. IF YOU ALSO APPLIED FOR CASH AID, and it has not yet been approved, your CalFresh benefits may be lowered or stopped without another notice if your cash aid is approved. You still must fill out and send in your complete Semi-Annual	For CalFresh, your family size is <AssistanceUnitSize>. Your IRT is <CurrentIrtLimit>. IF YOU ALSO APPLIED FOR CASH AID, and it has not yet been approved, your CalFresh benefits may be lowered or stopped without another notice if your cash aid is approved. You still must fill out and send in your complete Semi-Annual	Arial Font Size 10

	<p>Report (SAR7) or your CalFresh certification will stop, even though your benefits are zero.</p> <p>Remember to report dependent care cost each month and shelter and medical cost each month they change. Your CalFresh benefits will be available through Electronic Benefit Transfer-EBT on the <EBTAvailableDay> of each month.</p> <p>The amounts used to figure your CalFresh are shown on this notice. If your case contains a disqualified person(s) and that/those person(s) has/have income, all of their income is used to compute your CalFresh allotment.</p> <p>EBT: Keep your plastic Golden State Advantage card, even if your aid is terminated. Please do not throw it away.</p> <p>Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s).</p>	<p>Report (SAR7) or your CalFresh certification will stop, even though your benefits are zero.</p> <p>Your CalFresh benefits will be available through Electronic Benefit Transfer-EBT on the <EBTAvailableDay> of each month.</p> <p>The amounts used to figure your CalFresh are shown on this notice. If your case contains a disqualified person(s) and that/those person(s) has/have income, all of their income is used to compute your CalFresh allotment.</p> <p>EBT: Keep your plastic Golden State Advantage card, even if your aid is terminated. Please do not throw it away.</p> <p>Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s).</p>	
--	---	---	--

*English only, Spanish and threshold will generate based on project standards for that language.

2.2 CalSAWS/LRS only: Update CalFresh Approval SUAS Message Fragment

2.2.1 Overview

The existing CalFresh Approval SUAS Message based on the CF 377.1 in CalSAWS is out of date. With this effort it will be updated with the latest version published by the state (version 06/2019).

Message Fragment Name and ID: CF_AP_MESSAGE5 (ID: 5030)

State Form/NOA: CF 377.1 (06/19)

Current Program(s): CalFresh

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Existing Languages:

English and Spanish

2.2.2 Description of Change

This recommendation will update the CalFresh SUAS Message (CF_AF_MESSAGE5) fragment to match the CF 377.1 (06/2019) version.

2.2.2.1 Update CalFresh Approval Message Fragment XDP

The following verbiage will be updated to match the CF 377.1 (6/2019) version.

Updated Languages:

English and Spanish

NOA Mockups/Examples: See Supporting Documents #2

Description	Existing Text	Updated Text	Formatting
Static	Your CalFresh benefits may increase due to State Utility Assistance Subsidy (SUAS) payment we put into your cash EBT account. If you do not have a cash EBT account, one has been set up for you. The county has awarded you \$20.01 SUAS payment. This is a one-time per year payment. This payment allows the county to use the highest utility deduction (Standard Utility Allowance – SUA) for food	Your CalFresh household may be eligible to a State Utility Assistance Subsidy (SUAS) payment. If eligible, the county will award you a \$20.01 SUAS cash payment. This is a one-time per year payment and if eligible it will be put into your cash EBT account. If you do not have a cash EBT account, one will be set up for you on your CalFresh EBT card. You will not have to do anything to get a new card, but you can use it to cover	Arial Font Size 10

	benefits. You may use this \$20.01 when you use your EBT card. If you want to know more, call your worker.	expenses not otherwise covered by CalFresh. This payment allows the county to use the highest utility deduction (Standard Utility Allowance - SUA) for food benefits. You may use this \$20.01 when you use your EBT card. If you want to know more, please contact your local county office.	
--	--	---	--

*English only, Spanish and threshold will generate based on project standards for that language.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Message NOA Fragment	PDF mockup of CalFresh Approval Message.	See "377.1 CF AP Message mockup.pdf" attached to the SCR.
2	Message NOA Fragment	PDF mockup of CalFresh Approval SUAS Message.	See "377.1 CF AP SUAS Message mockup.pdf" attached to the SCR.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11 CAR-1247	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	This NOA is generated on the trigger condition of when approving an expedited service where one or more verification was postponed

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
--------	------------------	------------------------	---------------------

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214895

DDID 1628

Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas
	Reviewed By	Justin Dobbs, Sarah Cox, Pandu Gupta, Carlos Albances

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/20/2020	1.0	Initial Revision	Mayuri Srinivas

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions	4
2	Recommendations.....	5
2.1	Migrate a set of C-IV System Automated Tasks into the LRS/CalSAWS System....	5
2.1.1	Overview	5
2.1.2	Automated Action Detail – Reference Example	5
2.1.3	Description of Changes	6
3	Supporting Documents	21
4	Requirements.....	21
4.1	Migration Requirements.....	21
5	Migration Impacts	22
6	Outreach.....	23
7	Appendix.....	24

1 OVERVIEW

This design outlines modifications to migrate a population of existing C-IV System Automated Tasks into the LRS/CalSAWS System. The attributes defined for each Automated Action within this design document will be initially set up as default values based on the current logic available in the source C-IV System. The Automated Actions defined in this document will be configured to support all 58 counties.

1.1 Current Design

CA-214928 for DDID 34 introduces the Automated Action framework to the LRS/CalSAWS System. This framework allows a level of configurability of automated tasks by the counties. The C-IV System includes a set of automated tasks through the Automated Action framework that do not exist in the LRS/CalSAWS System.

CA-214893 migrated an initial population of C-IV System Automated Actions into the LRS/CalSAWS System.

1.2 Requests

Migrate a second population of C-IV System automated tasks into the LRS/CalSAWS System. This population is limited to automated tasks that do not currently exist in the LRS/CalSAWS System. Common automated tasks will be addressed with DDID 1629, which converts LRS/CalSAWS automated tasks into the Automated Action framework.

1.3 Overview of Recommendations

Migrate a second population of the C-IV System Automated Action settings for automated tasks into the LRS/CalSAWS System.

1.4 Assumptions

1. SCRs CA-214927 and CA-214928 related to DDID 34 have set up the underlying data model and front-end Automated Action pages to support Automated Action processing.
2. Not all batch processes require modifications to be configured to run for 58 counties. The Automated Actions defined in this document that do not have a recommendation to modify the batch process to support 58 counties will function for 58 counties natively or DDID 1787 has already accounted for the migration of C-IV System specific batch processes into the LRS/CalSAWS System.

2 RECOMMENDATIONS

This section will outline recommendations to migrate a population of C-IV System Automated Action tasks into the LRS/CalSAWS System.

2.1 Migrate a set of C-IV System Automated Tasks into the LRS/CalSAWS System

2.1.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation. For example, the county can choose to deactivate a specific automated task within their county outside of the project enhancement process. They also can define attributes such as Task Type, Task Sub-Type, the due dates and initial assignment information for the resulting tasks through the Automated Action Detail page. (Reference CA-214928 – DDID 34 for the specifics of the Automated Action pages).

This section outlines the modifications required to support a population of migrated C-IV System automated tasks in the Automated Action framework in the LRS/CalSAWS System.

2.1.2 Automated Action Detail – Reference Example

The screenshot displays the 'Automated Action Detail' interface. It features a title bar with 'Automated Action Detail' and two buttons: 'Edit' and 'Close'. The main content is divided into two sections: 'Action Information' and 'Task Information'. The 'Action Information' section includes fields for Name, Program(s), Scenario, Type, Run Date, and Status. The 'Task Information' section includes fields for Task Type, Task Sub-Type, Due Date, Default Due Date, Initial Assignment, and Default Assignment. A 'Long Description' field is also present at the bottom of the task information section.

Action Information		
Name: 180 Day EC Good Cause set to expire	Type: Create Task	Status: * Inactive
Program(s): FC	Run Date: Daily(Mon-Sat)	Source: Batch
Scenario: Emergency Caregiver Good Cause date set to expire		

Task Information	
Task Type: * Absent Parent	Task Sub-Type: Absent Parent I
Due Date: Default Due Date	Default Due Date: 30 day
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker
Long Description: 180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.	

Figure 2.1.2.1 – Automated Action Detail

2.1.3 Description of Changes

Migrate the following C-IV System automated tasks into the LRS/CalSAWS System. (Please reference the Automated Action Detail page in Figure 2.1.1 for display of the Action Information and Task Information attributes.)

Technical: For LA and CalWIN counties, the Automated Action Status will initially be Inactive with a blank Task Type and Task Sub-Type. This is because each county can set a custom Task Type for each Automated Action. If Los Angeles or a CalWIN county decides to activate one of these Automated Actions, the page validation will require that the county also select a Task Type to be used. As for the C-IV county entries, the Automated Action information will become available through the Automated Action pages with conversion as each county will have the ability to change configurations up until cutover into LRS/CalSAWS.

Attribute values such as "Program(s)" and "Run Date" are based on the attribute values available in the existing C-IV System Automated Action configurations.

1. CalFresh Member: Received Indian Commodities

This Automated Action is specific to Riverside county as it is dependent on a Riverside specific interface.

- a. Action Information
 - i. Name: CalFresh Member: Received Indian Commodities
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CF
 - v. Run Date: Daily(Monday-Friday)
 - vi. Source: Batch
 - vii. Scenario: An active CalFresh member has received Indian commodities. Re-evaluate the applicant's eligibility for CalFresh.
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: {Person's Name} received Indian Commodities and is currently active/pending in CalFresh. SSN:

{Person's Social Security Number} Please take appropriate action.

Note: SCR CA-21 6568 for Phase 5 of DDID 1787 will migrate the appropriate batch processes to LRS/CalSAWS that handle the interface file and the triggering of the Automated Action with the same release as this (CA-214895) enhancement.

2. CalFresh Member: Age 60 Review Eligibility
 - a. Action Information
 - i. Name: CalFresh Member: Age 60 Review Eligibility
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CF
 - v. Run Date: 1st day of each month(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: An active CalFresh member is turning 60. Review the member's eligibility for CalFresh.
 - b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Review the CalFresh eligibility determination for the household.
 - c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A110 to run on the 1st day of each month (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A110 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.
3. Child Care: Age 10 Years 10 Months Review Eligibility
 - a. Action Information
 - i. Name: Child Care: Age 10 Years 10 Months Review Eligibility
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CC
 - v. Run Date: 1st day of each month(Mon-Sat)
 - vi. Source: Batch

- vii. Scenario: A Child Care member is turning 10 years and 10 months next month. Review for continued eligibility and notifications.
 - b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 60 days before a child on a Child Care Program turns 11 years old
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: {Child_Name} ({Birthdate}) turns 10 years 10 months old on {next_month}. Review to determine continued eligibility. Send all required notifications.
 - c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A119 to run on the 1st day of each month (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A119 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.
- 4. Child Care: Age 13 Review Eligibility
 - a. Action Information
 - i. Name: Child Care: Age 13 Review Eligibility
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CC
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A Child Care participant is turning 13 in the next 30 days. Review program for continued eligibility.
 - b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The child, {Name}, will turn 13 years of age on {Birth Date}. Review the child care program for continued eligibility.

- c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A123 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A123 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.
5. Child Care: Age 2 or 6 Rate Change
- a. Action Information
 - i. Name: Child Care: Age 2 or 6 Rate Change
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CC
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A Child Care participant is turning 2 or 6 in the next 55 days. Review for rate change.
 - b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The child, {Name}, will turn {Age} years of age on {Birth Date}. Review rate type and date of age change for timely notification of rate change.
 - c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A120 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A120 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.
6. Child Care: Certificate Rate Change
- a. Action Information
 - i. Name: Child Care: Certificate Rate Change
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CC
 - v. Run Date: Daily(Mon-Sat)

- vi. Source: Batch
 - vii. Scenario: The certificate associated to a Child Care participant has a rate change. Review for rate change.
- b. Task Information
- i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 Days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The {Rate Type} rate associated with Child Care Certificate {Certificate Number}, for child {Name}, has changed.
- c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A121 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A121 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

7. Child Care: Service Terminated or Closed

- a. Action Information
- i. Name: Child Care: Service Terminated or Closed
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CC
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: The service that is associated with this Child Care Certificate has been either Terminated or Closed. Review the associated service.
- b. Task Information
- i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The service associated with Child Care Certificate {Certificate Number}, for child {Name}, has been {Status}.

- c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A122 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A122 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

8. Child Care: Stage 2 Time Limit Expiring

- a. Action Information
 - i. Name: Child Care: Stage 2 Time Limit Expiring Months
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CC
 - v. Run Date: 1st day of each month(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A Child Care member in this case is in their 22nd month, and will reach the Stage 2 time limit in 2 months.
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The Stage 2 Time Limit for this case will expire in two months.
- c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A109 to run on the 1st day of each month(Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A109 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

9. Foster Care Child: Permanency Plan Order Expiring

- a. Action Information
 - i. Name: Foster Care Child: Permanency Plan Order Expiring
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): FC
 - v. Run Date: 1st day of each month(Mon-Sat)
 - vi. Source: Batch

- vii. Scenario: A Foster Care child has a permanency plan court order that will expire in the next month. A new court order must be verified.
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: Last day of next month after batch date
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Verify a court finding was made on behalf of {child_name} and run EDBC to continue federal eligibility.
- c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A116 to run on the last day of next month after batch date and evaluate information for all 58 counties. Batch job PB00A116 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

10. Former Foster Care: Age 26

- a. Action Information
 - i. Name: Foster Care Child: Former Foster Care: Age 26
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): MC
 - v. Run Date: First business day of every month
 - vi. Source: Batch
 - vii. Scenario: A Former Foster Care recipient will turn 26 in the next 4 months. Review eligibility for other Insurance Affordability Programs.
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: First of the month in which child turns 26 OR if the person still has the aid code in the next month the task due date will be first of next month after Batch Date
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker

- vii. Long Description: {Person_Name} will turn 26 on {birth_date}. Please determine eligibility for any other Insurance Affordability Program.
- c. Implement a new batch job in LRS/CalSAWS to trigger the Automated Action for Medi-Cal Active Members with a 4M aid code who are turning 26 years of age within the next 4 months. **Technical:** Batch process (PB00A136) in the C-IV System can be referenced for the specific logic and conditions to be ported that trigger the Automated Action. Note that the C-IV System reference logic triggers the Automated Action with a scenario code of 'C1'. The scenario code for this Automated Action in LRS/CalSAWS will be F4, so the reference logic will require an adjustment to accommodate this scenario code change.

11. Child Care: Activity Updated Review Eligibility

- a. Action Information
 - i. Name: Child Care: Activity Updated Review Eligibility
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CC, WT
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A Former Foster Care recipient will turn 26 in the next 4 months. Review eligibility for other Insurance Affordability Programs.
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Activity of {Activity Name}, for {Name}, was {Status}. Please review for continued child care need.
- c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A124 to run daily(Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A124 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

12. Generated Document Failed: Review

- a. Action Information
 - i. Name: Generated Document Failed: Review
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): WT, FT, CW, MC, CF
 - v. Run Date: Daily(Monday-Saturday)
 - vi. Source: Batch
 - vii. Scenario: A NOA or form was not produced as part of the Generated Document Batch process. Review the case for missing Primary Applicant (PA), Primary Applicant Mailing Address, and/or Worker Assignment.

- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 30 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Form/NOA generation failed for either no Primary Applicant (PA), No PA Mailing Address or no Worker Assignment.

- c. Update the LRS/CalSAWS Dynamic NOA/forms generation processes to trigger the Automated Action when a NOA/form fails to be generated.

13. Generated Document Failed: Review

- a. Action Information
 - i. Name: Generated Document Failed: Review
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): WT, CW, MC, CF
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A new worker letter was not produced during workload reassignment. Review the case for missing Primary Applicant (PA), Primary Applicant Mailing Address, and/or Worker Assignment.

- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days

- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Form/NOA generation failed for either no Primary Applicant (PA), no PA Mailing Address or no Worker Assignment.

- c. Update LRS/CalSAWS to trigger the Automated Action when the Reassign button is used on the Workload Reassignment Detail page and the new worker letter form fails to be generated.

14. MC 355 Due

- a. Action Information
 - i. Name: MC 355 Due
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): MC
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: MC 355 Due Automated Task
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 5 calendar days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: MC 355 pending verifications are overdue. Review the MC 355 Detail page and take appropriate action.
- c. Update LRS/CalSAWS to trigger the Automated Action with batch process (PB00E105) for all LRS/CalSAWS counties. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

15. DCSS Report: Custodial Parent Claims Good Cause

- a. Action Information
 - i. Name: DCSS Report: Custodial Parent Claims Good Cause
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): AR, CW, FC, KG, MC
 - v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
 - vi. Source: Batch

- vii. Scenario: DCSS has reported the custodial parent is not cooperating with child support because they have claimed Good Cause. Review the custodial parent's eligibility for Good Cause.
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: {Custodial Parent Name} Claimed Good Cause at IVD. Review eligibility for Good Cause
- c. Update LRS/CalSAWS to trigger the Automated Action with batch process (PIXXF1601). This batch process currently runs in LRS/CalSAWS and it will run for each additional county except Riverside and San Bernardino. These two counties will trigger the Automated Action with batch process (PIXXF1600), which is current process in the C-IV System as well.

16. Expected Delivery Date Reached: Follow Up

- a. Action Information
 - i. Name: Expected Delivery Date Reached: Follow Up
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): WT, FT, HP, CW, FC, CC, CL, KG, MC, CS, CF, AS, HT, LS
 - v. Run Date: Runs the last business day of every month.
 - vi. Source: Batch
 - vii. Scenario: A pregnancy with an expected delivery date in this past month has been reached. Follow up with the member to confirm pregnancy status.
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Expected delivery date for pregnancy of {Person Name} has occurred on {Expected Delivery Date}. Follow up on pregnancy status.

- c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A300 to run on the last business day of every month and evaluate information for all 58 counties. Batch job PB00A300 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

17. CalHEERS: Customer Information Updated

- a. Action Information
 - i. Name: CalHEERS: Customer Information Updated
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): MC
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A customer has updated their information in CalHEERS
- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Customer information has been updated in CalHEERS and is available to be reviewed. Please navigate to the Inter-Agency Transfer Summary page to find the Information Update.
- c. Update LRS/CalSAWS to trigger the Automated Action from batch process PB00CH210 by migrating the trigger conditions from the same batch process in the C-IV System.

18. WTW Recipient: Employment Added

- a. Action Information
 - i. Name: WTW Recipient: Employment Added
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): WT
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: "Either of the following actions has occurred on the Welfare to Work (WTW) program:

- an employment record was created for the current Primary Applicant
- the WTW program is currently in a status other than Pending or Deregistered
- the worker adding the employment is not the worker currently assigned to the program"

- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Employment for {Person Name} entered by {workerId}.

- c. Update LRS/CalSAWS to trigger the automated action from the Employment Detail page by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

19. WTW Recipient: Dropped from Class

- a. Action Information
 - i. Name: WTW Recipient: Dropped from Class
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): WT
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A Welfare to Work (WTW) recipient has been dropped from a class by the organization. Review impacts to WTW program.

- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: Immediately
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: {Organization ID} has dropped {Person Name} from {Service Type Decode} at {Organization Name} on {Drop Date}.

- c. Update LRS/CalSAWS to trigger the automated action from the Class Performance Detail page when a resource dropped a recipient from a class by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

20. Issuance Returned: Review

- a. Action Information
 - i. Name: Issuance Returned: Review
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): WT, AA, HP, FT, FC, CW, IN, CC, CL, KG, MC, HT, CF, CP, GA, GM, AR
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: An issuance has been returned on this case and needs further review.

- b. Task Information

- i. Task Type: BLANK
- ii. Task Sub-Type: BLANK
- iii. Due Date: Default Due Date
- iv. Default Due Date: 30 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Issuance ID: {issuanceId} for Case: {caseNumber} and Case Name: {caseName} has been Returned with a Status Reason of "{statusReason}". Please update this case and notify fiscal to take the appropriate action regarding this returned warrant.

- c. Update LRS/CalSAWS to trigger the automated action when an Issuance receives a 'Returned' status through the Issuance Detail page.

21. Change in Benefits: Review WEX

- a. Action Information
 - i. Name: Change in Benefits: Review WEX
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): WT, AA, AR, FT, HP, CW, FC, IN, CC, CL, DV, KG, MC, CS, CF, HT, CP, RC, GA
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A change in benefits has occurred. Review the Work Experience (WEX) and/or community hours.

- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 30 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Issuance ID: {issuanceId} for Case: {caseNumber} and Case Name: Review WEX/Community Service hours due to change in benefits for {caseNumber}.

- c. Update LRS/CalSAWS to trigger the automated action when EDBC results in a change in benefits by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

22. Foster Care Child: Placement Change

- a. Action Information
 - i. Name: Foster Care Child: Placement Change
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): FC
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A Foster Care child has had a placement change. Review the new placement and run EDBC as needed.

- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: A Placement has changed for the Foster Care child on your case. Please review the Placement information and run EDBC.

- c. Update LRS/CalSAWS to trigger the automated action when a child placement changes by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

23. Child Care Service: Closed With Active Certificate

- a. Action Information
 - i. Name: Child Care Service: Closed With Active Certificate
 - ii. Type: Create Task

- iii. Status: Inactive
 - iv. Program(s): CC
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A Child Care service has been closed with an active certificate associated. Review certificates.
- b. Task Information
- i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: Immediately
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The service associated with Child Care Certificate {id}, for child {ChildName}, has been closed.
- c. Update LRS/CalSAWS to trigger the automated action from the Service Detail page when a Child Care service is closed with an active certificate associated by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

3 SUPPORTING DOCUMENTS

N/A – No Supporting Documents

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1628	The CONTRACTOR shall migrate the existing C-IV automated tasks, as specified in the “Task Management C-IV Automated Task Inventory” appendix, into the CalSAWS Software for all 58 Counties; as well as migrate current task configurations for 39 C-IV	<ul style="list-style-type: none"> - Approximately 22 C-IV automated actions directly overlap with LRS automated tasks. - Support for mapping CalWIN automated 	This design will migrate a second population of 23 C-IV System automated tasks into the LRS/CalSAWS System as the second phase of DDID 1628.

	<p>Migration Counties into the CalSAWS Software as default settings for the 39 C-IV Migration Counties.</p>	<p>tasks to C-IV automated tasks is not included.</p> <ul style="list-style-type: none"> - Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'C-IV Automated Tasks' 	
--	---	---	--

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214897

DDID 1629

Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Justin Dobbs
	Reviewed By	Sarah Cox, Pandu Gupta, Carlos Albances, Michael Wu, Naveen Bhumandla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/28/2020	1.0	Initial Revision	Justin Dobbs

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Update LRS/CalSAWS Automated Tasks Per Automated Action Framework.....	5
	2.1.1 Overview	5
	2.1.2 Automated Action Detail – Reference Example	5
	2.1.3 Description of Changes	6
3	Supporting Documents	30
4	Requirements.....	30
	4.1 Migration Requirements.....	30
5	Migration Impacts	32
6	Outreach.....	33
7	Appendix.....	34

1 OVERVIEW

This design outlines modifications to a population of existing LRS/CalSAWS automated tasks to function per the Automated Action framework introduced with CA-214928 (DDID 34 – Unified Task Management).

1.1 Current Design

The LRS/CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 includes recommendations to introduce Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties.

1.2 Requests

Update a population of automated LRS/CalSAWS tasks to function within the Automated Action framework.

1.3 Overview of Recommendations

Update a sub population of automated LRS/CalSAWS tasks to function within the Automated Action framework.

1.4 Assumptions

1. SCRs CA-214927 and CA-214928 related to DDID 34 have set up the underlying data model and front-end Automated Action pages to support Automated Action processing.
2. Not all batch processes require modifications to be configured to run for 58 counties. The Automated Actions defined in this document that do not have a recommendation to modify the batch process to be 58 county friendly will function for 58 counties natively, they are Los Angeles specific, or DDID 1787 has already accounted for the migration of C-IV System specific batch processes into the LRS/CalSAWS System.

2 RECOMMENDATIONS

This section will outline recommendations to adjust a population of LRS/CalSAWS automated tasks to function within the Automated Action framework.

2.1 Update LRS/CalSAWS Automated Tasks Per Automated Action Framework

2.1.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation. For example, the county can choose to deactivate a specific automated task within their county outside of the project enhancement process. They also can define attributes such as Task Type, Task Sub-Type, the due dates and initial assignment information for the resulting tasks through the Automated Action Detail page. (Reference CA-214928 – DDID 34 for the specifics of the Automated Action pages).

This section outlines the modifications required to support a population of LRS/CalSAWS automated tasks in the Automated Action framework.

2.1.2 Automated Action Detail – Reference Example

The screenshot displays the 'Automated Action Detail' interface. It features a title bar with 'Automated Action Detail' and two buttons: 'Edit' and 'Close'. The main content is divided into two sections: 'Action Information' and 'Task Information'. The 'Action Information' section includes fields for Name, Type, Status, Program(s), Run Date, and Source. The 'Task Information' section includes fields for Task Type, Task Sub-Type, Due Date, Default Due Date, Initial Assignment, and Default Assignment. A 'Long Description' field is also present at the bottom of the task information section.

Action Information		
Name: 180 Day EC Good Cause set to expire	Type: Create Task	Status: * Inactive
Program(s): FC	Run Date: Daily(Mon-Sat)	Source: Batch
Scenario: Emergency Caregiver Good Cause date set to expire		

Task Information	
Task Type: * Absent Parent	Task Sub-Type: Absent Parent I
Due Date: Default Due Date	Default Due Date: 30 day
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker
Long Description: 180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.	

Figure 2.1.1 – Automated Action Detail

2.1.3 Description of Changes

Update the following LRS/CalSAWS automated tasks to define the required Automated Action attributes in order to function with the Automated Action Framework. (Please reference the Automated Action Detail page in Figure 2.1.1 for display of the attributes.)

1. WTW/REP Recipient: 11 Month Vocational Training Exhausted
 - a. Action Information
 - i. Name: WTW/REP Recipient: 11 Month Vocational Training Exhausted
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): WT, RE
 - v. Run Date: 1st day of each month(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A WTW/REP recipient has reached 11 months in a Vocational Training activity.
 - b. Task Information
 - i. Task Type: 11 months after Vocational Training Activity Start Date
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 30 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: 11 months after Vocational Training Activity Start Date
 - c. Update the batch process (PB19A225) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

2. REP Recipient: 55 Months Since Date of Entry

This Automated Action will only be configured for Los Angeles county as it is specific to the Refugee Employment Program (REP).

- a. Action Information
 - i. Name: REP Recipient: 55 Months Since Date of Entry
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): RE

- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: 55 months have passed since a REP recipient's date of entry. Take appropriate action.

b. Task Information

- i. Task Type: 55 months from DOE
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 7 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Participant reaches 55 months from Date of Entry on {Date}

3. REP Recipient: 60 Months Since Date of Entry

This Automated Action will only be configured for Los Angeles county as it is specific to the Refugee Employment Program (REP).

a. Action Information

- i. Name: REP Recipient: 60 Months Since Date of Entry
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): RE
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: 60 months have passed since a REP recipient's date of entry. Take appropriate action.

b. Task Information

- i. Task Type: 60 months from DOE
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 7 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Participant reaches 60 months from Date of Entry on {Date}

4. Child Support: Absent Parent Living with Applicant

a. Action Information

- i. Name: Child Support: Absent Parent Living with Applicant
- ii. Type: Create Task
- iii. Status: Active

- iv. Program(s): AR, CW, FC, KG, MC
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: An absent parent, in a child support case, is now living with the applicant. Update case information accordingly.

b. Task Information

- i. Task Type: Absent Parent in household
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: {Absent Parent Name} is living with applicant as of {Date}.

5. Child Support: Parent Not Living with Applicant

a. Action Information

- i. Name: Child Support: Parent Not Living with Applicant
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): AR, CW, FC, KG, MC
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: A parent, in a child support case, is no longer living with the applicant. Update case information accordingly.

b. Task Information

- i. Task Type: Absent Parent not living with applicant
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: {Absent Parent Name} is not living with applicant as of {Date}

6. Child Care Recipient: Activity End Date Changed

a. Action Information

- i. Name: Child Care Recipient: Activity End Date Changed
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): CC
- v. Run Date: Real Time
- vi. Source: Online

vii. Scenario: A Child Care recipient's activity end date has been changed.

b. Task Information

- i. Task Type: Activity End Date changed
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 7 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Activity End Date changed

7. Medi-Cal Recipient: Carry Forward DER Received

a. Action Information

- i. Name: Medi-Cal Recipient: Carry Forward DER Received
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): MC
- v. Run Date: Monthly or Real Time
- vi. Source: Batch/Online
- vii. Scenario: A Determination of Eligibility Response (DER) has been received from CalHEERS with a carry forward status of yes for an Active Medi-Cal program. The DER is not the result of a worker initiated Eligibility Determination Request (EDR). Take appropriate action.

b. Task Information

- i. Task Type: APTC Carry Forward
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: MAGI response received with APTC Carry Forward. Review results to determine if new MAGI request should be sent for future month to Lift Carry Forward.

8. Medi-Cal Recipient: Soft Pause DER Received

a. Action Information

- i. Name: Medi-Cal Recipient: Soft Pause DER Received
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): MC
- v. Run Date: Monthly or Real Time

- vi. Source: Batch/Online
 - vii. Scenario: A soft pause Determination of Eligibility Response (DER) has been received from CalHEERS for an Active Medi-Cal program. The DER is not the result of a worker initiated Eligibility Determination Request (EDR). Take appropriate action.
- b. Task Information
- i. Task Type: MAGI Soft Pause
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: MAGI response received with Soft Pause. Review results to determine if new MAGI request should be sent for future month to Lift Soft Pause. For persons: {SP_PERSONS_FOUND}.

9. Cal-Learn Recipient: Age 19

- a. Action Information
- i. Name: Cal-Learn Recipient: Age 19
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CL
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A Cal-Learn recipient is turning 19 years of age in 45 days.
- b. Task Information
- i. Task Type: Cal-Learn - turning 19 years old
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 30 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: A Cal-Learn recipient is turning 19 years old.
- c. Update the batch process (PB19A238) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

10. Child Care Recipient: CalWORKs Benefit Amount Changed

- a. Action Information
 - i. Name: Child Care Recipient: CalWORKs Benefit Amount Changed
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CC, CW
 - v. Run Date: Monthly
 - vi. Source: Batch
 - vii. Scenario: CalWORKs benefits have changed for an Active Child Care recipient.
- b. Task Information
 - i. Task Type: CalWORKs benefit amount has changed
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: CalWORKs benefit amount has changed.
- c. Update the batch process (PB19A233) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

11. Language: Spoken and/or Written Language Changed

- a. Action Information
 - i. Name: Language: Spoken and/or Written Language Changed
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): All Programs
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A recipient's primary spoken and/or written language has changed. Please review and reassign as needed.
- b. Task Information
 - i. Task Type: Change in Primary Language Designation
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 5 days
 - v. Initial Assignment: Default Assignment

- vi. Default Assignment: Current Program Worker
- vii. Long Description: The participant's primary spoken and/or written language has changed. Please review and transfer the case to a bi-lingual worker, if appropriate.

12. Child Care Recipient: Household Status Changed

- a. Action Information
 - i. Name: Child Care Recipient: Household Status Changed
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CC
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A Child Care recipient's Household Status has been updated. Please review.
- b. Task Information
 - i. Task Type: Child Living in the Home Status changed
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Child Living in the Home Status changed.

13. WTW Recipient: Compliance Plan Expired

- a. Action Information
 - i. Name: WTW Recipient: Compliance Plan Expired
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): WT
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A Welfare to Work recipient's Compliance Plan has expired. Take appropriate action.
- b. Task Information
 - i. Task Type: Compliance Plan Expired
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker

- vii. Long Description: Compliance Plan Expired. Enter completion Result.
- c. Update the batch process (PB19A223) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

14. Primary Applicant: Deceased

This Automated Action will only be configured for Los Angeles county as it is based on information from the Los Angeles County Registrar Recorder/County Clerk Office. CA-216162 includes the Automated Action specifics when MEDS communicates a deceased person, which will apply to all counties.

- a. Action Information
 - i. Name: Primary Applicant: Deceased
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CF, CP, CW, GA, MC, NB, RC
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: The Los Angeles County Registrar Recorder/County Clerk Office has indicated that an Active Primary Applicant is deceased. Take appropriate action.
- b. Task Information
 - i. Task Type: Head of Household/Case Payee Deceased
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: {Deceased Individual Name} died on {deceasedDate}.Please take appropriate action to change the case payee.

15. Cal-Learn Participant: Earned High School Diploma

- a. Action Information
 - i. Name: Cal-Learn Participant: Earned High School Diploma
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CL

- v. Run Date: Real Time
- vi. Source: Online
- vii. Scenario: A Cal-Learn program participant has been Discontinued due to earning a high school diploma or equivalent.

b. Task Information

- i. Task Type: Participant Earned HS Diploma or Equivalent
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 7 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Participant Earned high school diploma or equivalent.

16. General Assistance Participant: Jail Match

This Automated Action will only be configured for Los Angeles county as it is specific to the Los Angeles county jail match interface.

a. Action Information

- i. Name: General Assistance Participant: Jail Match
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): GA
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: An Active General Assistance program participant has received a jail match. Take appropriate action.

b. Task Information

- i. Task Type: Received Jail Match Record
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Received Jail Match record for {first, Last Name} please review.

17. CalWORKs Program: New Child Added

a. Action Information

- i. Name: CalWORKs Program: New Child Added
- ii. Type: Create Task

© 2020 CalSAWS. All Rights Reserved.

- iii. Status: Active
- iv. Program(s): CW
- v. Run Date: Real Time
- vi. Source: Online
- vii. Scenario: A new child has been added to a CalWORKs program.

- b. Task Information
 - i. Task Type: New child added to CalWORKs Program
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: New child added to CalWORKs Program.

- c. Update the Los Angeles county Task Type to be "New child added to CalWORKs Program" instead of "New child added to CalWorks Program". CalWORKs was misspelled.

18. Customer Activity: Added

- a. Action Information
 - i. Name: Customer Activity: Added
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): WT, FT, CW, CL, CC
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A new activity has been added for a participant.

- b. Task Information
 - i. Task Type: New Activity added
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: New Activity added.

19. Learning Disability: Evaluation Completed

- a. Action Information
 - i. Name: Customer Activity: Added
 - ii. Type: Create Task
 - iii. Status: Active

- iv. Program(s): CL, RE, WT
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: A participant has been screened for a learning disability. Take appropriate action.

b. Task Information

- i. Task Type: Learning disability Evaluation Completed
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 7 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Learning disability evaluation Completed. Add Services 005 activity.

- c. Update the batch process (PB19A222) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

20. Welfare to Work: Good Cause Expiring

a. Action Information

- i. Name: Welfare to Work: Good Cause Expiring
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): WT
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: Welfare to Work Good Cause is expected to end in 10 days. Take appropriate action.

b. Task Information

- i. Task Type: Good Cause Expiring
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 7 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Participant's Good Cause is expiring in 10 days.

- c. Update the batch process (PB19A221) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the

batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

21. Work Registration: Status Changed

- a. Action Information
 - i. Name: Work Registration: Status Changed
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CW, RC, GA, CP, CF, MC
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A Work Registration exemption status changed from Exempted to Mandatory or from Mandatory to Exempted. Take appropriate action.
- b. Task Information
 - i. Task Type: Exemption Change
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 15 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The participant exemption status changed from Exempted to Mandatory or from Mandatory to Exempted. Take appropriate action.

22. Living Arrangement: Homeless Ended

- a. Action Information
 - i. Name: Living Arrangement: Homeless Ended
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): All Programs
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: An eligibility worker ended the homeless living arrangement for the case. Take appropriate action.
- b. Task Information
 - i. Task Type: Participant No Longer Homeless
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment

- vi. Default Assignment: Current Program Worker
- vii. Long Description: The eligibility worker ended the homeless situation for this case.

23. Recovery Account: Created

- a. Action Information
 - i. Name: Recovery Account: Created
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): All Programs
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: The system has created a Recovery Account. Take appropriate action.
- b. Task Information
 - i. Task Type: Overpayment created.
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: The system created an overpayment due to no receipts on records after 30 days.
- c. Update the batch process (PB19A236) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

24. Program Participant: Name Changed

- a. Action Information
 - i. Name: Program Participant: Name Changed
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): All Programs
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A person's name has been changed on the Individual Demographics Detail page and the Case includes a Child Care program.
- b. Task Information

- i. Task Type: Participant name is changed
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 7 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: The participant's name has changed.

25. Welfare to Work Participant: CalWORKs Discontinued

- a. Action Information
 - i. Name: Welfare to Work Participant: CalWORKs Discontinued
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CW, WT
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A participant with an Active Welfare to Work program is associated to a Discontinued CalWORKs program. Review and take appropriate action.
- b. Task Information
 - i. Task Type: Participant is no longer eligible
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: A Welfare to Work participant is no longer receiving CalWORKs assistance.
- c. Update the batch process (PB19A202) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

26. REP Recipient: Flag Expiring

This Automated Action will only be configured for Los Angeles county as it is specific to the Refugee Employment Program (REP).

- a. Action Information
 - i. Name: REP Recipient: Flag Expiring
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): RE

- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: The refugee flag expires in less than 30 days. Take appropriate action.

b. Task Information

- i. Task Type: Refugee Flag Expires In Less Than 30 Days
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 30 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: The Refugee Flag Expires In Less Than 30 Days - Review the case.

27. DCSS Report: Paternity Proof for Absent Parent Established

a. Action Information

- i. Name: DCSS Report: Paternity Proof for Absent Parent Established
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): AR, CW, FC, KG, MC
- v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: DCSS has reported that paternity proof for the absent parent has been established. Update the details of the child support case accordingly.

b. Task Information

- i. Task Type: Paternity Established for {Child Name}
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: {Absent Parent Name} has been proven to be the father of {Child Name} as of {Date}

28. DCSS Report: Custodial Parent Has Not Cooperated

a. Action Information

- i. Name: DCSS Report: Custodial Parent Has Not Cooperated
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): AR, CW, FC, KG, MC

- v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: DCSS has reported that a custodial parent associated to a child support case has not cooperated. Update the case information to apply the applicable penalty, after proper noticing.

b. Task Information

- i. Task Type: Paternity Established for {Child Name}
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Apply penalty following Timely & Adequate Notice

29. Child Support: Excess Amount Paid to Custodial Parent

a. Action Information

- i. Name: Child Support: Excess Amount Paid to Custodial Parent
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): AR, CW, FC, KG, MC
- v. Run Date: Daily(Mon-Fri)
- vi. Source: Batch
- vii. Scenario: Excess child support amount has been paid to the custodial parent.

b. Task Information

- i. Task Type: Excess Child Support
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Excess Child Support of {Amount} paid to {Custodial Parent Name} on {Date}.

30. Child Support: Direct Amount Paid to Custodial Parent

a. Action Information

- i. Name: Child Support: Direct Amount Paid to Custodial Parent
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): AR, CW, FC, KG, MC

- v. Run Date: Daily(Mon-Fri)
- vi. Source: Batch
- vii. Scenario: Direct child support amount has been paid to the custodial parent.

b. Task Information

- i. Task Type: Direct Child Support
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Direct Child Support of {Amount} paid to {Custodial Parent Name} on {Date}.

31. DCSS Report: Absent Parent Excluded as Father of Child

a. Action Information

- i. Name: DCSS Report: Absent Parent Excluded as Father of Child
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): AR, CW, FC, KG, MC
- v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: DCSS has reported that an absent parent has been excluded as the father of child. Update the details of the child support case accordingly.

b. Task Information

- i. Task Type: Paternity Excluded
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: {Absent Parent Name} has been excluded as the father of {Child Name} as of {Date}

32. DCSS Report: Update to OHC Provided by Absent Parent

a. Action Information

- i. Name: DCSS Report: Update to OHC Provided by Absent Parent
- ii. Type: Create Task
- iii. Status: Active

- iv. Program(s): WT, AR, CW, FC, KG, MC, CF
- v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: DCSS has reported updates to the Other Health Coverage (OHC) provided by the absent parent. Update the case with new health coverage information.

b. Task Information

- i. Task Type: Health Insurance provided by Absent Parent
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Insurance Type: {Type} Health insurance provided by {Policy Holder Name} for {Member Name} through {Co Name} Policy Number: {Policy Num} Insurance Company Address Line 2: {Addr Line2} Insurance Company Address Line 1: {Addr Line1} City: {Co City} State: {Co State} Zip: {Co Zip}

33. IEVS Report: New Earnings Clearance Report

a. Action Information

- i. Name: IEVS Report: New Earnings Clearance Report
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): CW, CF, MC, RC, CP, FC, AR
- v. Run Date: Daily(Monday-Friday)
- vi. Source: Batch
- vii. Scenario: A new IEVS earnings clearance report has been assigned to a case, based on county configuration. Review the IEVS report.

b. Task Information

- i. Task Type: IFDS Income Match - Over \$2500 discrepancy
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 45 days
- v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display
All other counties	Default Assignment	Current Program Worker

- vi. Long Description: New Earnings Clearance report assignment for case {case_number} (assign date: {date})
- c. Update the Los Angeles county batch process (PB19C406) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC400 logic which will trigger the task for the remaining 57 counties.
- d. **Technical:** Update the batch process (PBXXC400) for the 57 migration counties to trigger this Automated Action with a scenario code of 'N4' instead of 'C7'.

34. IEVS Report: New PVS Match

- a. Action Information
 - i. Name: IEVS Report: New PVS Match
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CW, CF, MC, RC, CP, FC, AR
 - v. Run Date: Daily(Monday-Friday)
 - vi. Source: Batch
 - vii. Scenario: A new IEVS PVS match report has been assigned to a case, based on county configuration. Review the IEVS report.
- b. Task Information
 - i. Task Type: Pending PVS Abstract
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 20 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: New PVS report assignment for case {case_number} (assign date: {date})
- c. Update the Los Angeles county batch process (PB19C404) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC405 logic which will trigger the task for the remaining 57 counties. **Technical:** Also update the Los Angeles county batch process to trigger the Automated Action with a scenario code of 'C3' instead of 'C9'.

35. IEVS Report: New Prisoner Match

- a. Action Information
 - i. Name: IEVS Report: New Prisoner Match
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CW, CF, MC, RC, CP, FC, AR
 - v. Run Date: Daily(Monday-Friday)
 - vi. Source: Batch
 - vii. Scenario: A new IEVS prisoner match report has been assigned to a case, based on county configuration. Review the IEVS report.

- b. Task Information
 - i. Task Type: Pending NPM abstract
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 20 days
 - v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display
All other counties	Default Assignment	Current Program Worker

- vi. Long Description: New Prisoner Match report assignment for case {case_number} (assign date: {date})
- c. Update the Los Angeles county batch process (PB19C201) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC404 logic which will trigger the task for the remaining 57 counties.
- d. **Technical:** Update the batch process (PBXXC404) for the 57 migration counties to trigger this Automated Action with a scenario code of 'N1' instead of 'C4'.

36. IEVS Report: New Hire Report

- a. Action Information
 - i. Name: IEVS Report: New Hire Report
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CW, CF, MC, RC, CP, FC, AR
 - v. Run Date: Daily(Monday-Friday)
 - vi. Source: Batch

vii. Scenario: A new IEVS new hire report has been assigned to a case, based on county configuration. Review the IEVS report.

b. Task Information

- i. Task Type: Pending NHR Abstract
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 20 days
- v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display
All other counties	Default Assignment	Current Program Worker

vi. Long Description: New New Hire report assignment for case {case_number} (assign date: {date})

c. Update the Los Angeles county batch process (PB19C505) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC403 logic which will trigger the task for the remaining 57 counties.

d. **Technical:** Update the batch process (PBXXC403) for the 57 migration counties to trigger this Automated Action with a scenario code of 'N6' instead of 'C5'.

37. IEVS Report: New Fleeing Felon Report

a. Action Information

- i. Name: IEVS Report: New Fleeing Felon Report
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): CW, CF, MC, RC, CP, FC, AR
- v. Run Date: Daily(Monday-Friday)
- vi. Source: Batch
- vii. Scenario: A new IEVS fleeing felon report has been assigned to a case, based on county configuration. Review the IEVS report.

b. Task Information

- i. Task Type: Pending Fleeing Felon Abstract
- ii. Task Sub-Type: N/A

- iii. Due Date: Default Due Date
- iv. Default Due Date: 20 days
- v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display
All other counties	Default Assignment	Current Program Worker

- vi. Long Description: New Fleeing Felon report assignment for case {case_number} (assign date: {date})
- c. Update the Los Angeles county batch process (PB19C200) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC402 logic which will trigger the task for the remaining 57 counties.
 - d. **Technical:** Update the batch process (PBXXC402) for the 57 migration counties to trigger this Automated Action with a scenario code of 'N3' instead of 'C6'.

38. IEVS Report: New IEVS Applicant Abstract

- a. Action Information
 - i. Name: IEVS Report: New IEVS Applicant Abstract
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CW, CF, MC, RC, CP, FC, AR
 - v. Run Date: Daily(Monday-Friday)
 - vi. Source: Batch
 - vii. Scenario: A new IEVS applicant abstract report has been assigned to a case, based on county configuration. Review the IEVS report.
- b. Task Information
 - i. Task Type: Pending Applicant IEVS Abstract
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 20 days
 - v. Initial Assignment: Office Distribution
 - vi. Default Assignment: N/A – Field does not display
 - vii. Long Description: IEVS Applicant information is available for {CASE_NUMBER}

- c. Update the batch process (PIXXC503) that triggers this Task to populate the case number into the Long Description of the task.
Technical Note: This batch process will also trigger the Automated Action with a scenario code of 'C8'.

39. GR/GROW: Hearing Reversed

- a. Action Information
 - i. Name: GR/GROW: Hearing Reversed
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): GA, GW
 - v. Run Date: Real Time
 - vi. Source: Online
 - vii. Scenario: A GR/GROW Hearing has been "Reversed", take action to rescind the program if necessary.
- b. Task Information
 - i. Task Type: GR/GROW Hearing Results
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 2 days before the third Thursday of the month
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: GR/GROW Hearing has been "Reversed" need to rescind case

40. Welfare to Work Participant: Missed Appraisal Appointment

- a. Action Information
 - i. Name: Welfare to Work Participant: Missed Appraisal Appointment
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): WT
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A Welfare to Work Exempt Volunteer missed an appraisal appointment. Take appropriate action.
- b. Task Information
 - i. Task Type: Exempt Participant did not show for Appraisal
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker

vii. Long Description: Exempt Volunteer no show for appraisal appointment - Deregister the case.

c. Update the batch process (PB19A226) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

41. Employment: Added or Updated by EW

a. Action Information

- i. Name: Employment: Added or Updated by EW
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): WT
- v. Run Date: Real Time
- vi. Source: Online
- vii. Scenario: Employment information has been added or updated by an eligibility worker.

b. Task Information

- i. Task Type: Employment Added/Updated by EW
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 15 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Participant reported Employment changes to Eligibility Worker.

42. Welfare to Work Participant: Sanction Curing Period Ending

a. Action Information

- i. Name: Welfare to Work Participant: Sanction Curing Period Ending
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): WT
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: A Welfare to Work participant's sanction curing period end date is approaching. Take appropriate action.

b. Task Information

- i. Task Type: Sanction Curing Period End Date Approaching
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date

- iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: Curing period end date approaching and sanction is not ended.
- c. Update the batch process (PB19A220) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1629	The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.	<ul style="list-style-type: none"> - Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county. - Support for mapping CalWIN automated tasks to LRS automated tasks is not included. 	42 automated Tasks in LRS/CalSAWS are being converted into the Automated Action framework with this enhancement. This is the second phase of DDID 1629.

		<ul style="list-style-type: none">- Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties.- Please refer to CalSAWS Agreement Exhibit U Schedule 1 – Attachment 1 Contractor Assumptions Inventory List, worksheet 'LRS Automated Tasks'	
--	--	---	--

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215016 | DDID 2591

Add CSF 141-Child Care Reimbursement Request
(09/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/08/2020	1.0	Original	Pramukh Karla
09/29/2020	2.0	Updated design document to address QA comments	Pramukh Karla

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	5
2	Recommendations.....	6
2.1	Add CSF 141-Child Care Reimbursement Request (09/2020) Form	6
2.1.1	Overview	6
2.1.2	Description of Change.....	6
2.2	Update Child Care Certificate Detail page to generate CSF 141 Form	9
2.2.1	Overview	9
2.2.2	Child Care Certificate Detail Mockups.....	9
2.2.3	Description of Changes	11
2.2.4	Page Location	11
2.2.5	Security Updates.....	11
2.2.6	Page Mapping.....	12
2.2.7	Page Usage/Data Volume Impacts	12
2.3	Child Care Customer Reporting Detail page	12
2.3.1	Overview	12
2.3.2	Child Care Customer Reporting Detail Mockup.....	12
2.3.3	Description of Changes	17
2.3.4	Page Location	20
2.3.5	Security Updates.....	20
2.3.6	Page Mapping.....	20
2.3.7	Page Usage/Data Volume Impacts	20
2.4	Batch - Add a new CSF 141 Form Sweep Job	21
2.4.1	Overview	21
2.4.2	Description of Change.....	21
2.4.3	Execution Frequency.....	22
2.4.4	Key Scheduling Dependencies	22
2.4.5	Counties Impacted	22
2.4.6	Data Volume/Performance.....	22

	2.4.7 Failure Procedure/Operational Instructions.....	22
3	Supporting Documents	22
4	Requirements.....	23
	4.1 Migration Requirements.....	23

1 OVERVIEW

The purpose of this change is to add the CSF 141-Child Care Reimbursement Request (09/2020) Form in English and Spanish Languages to CalSAWS System for all 57 migration counties.

1.1 Current Design

CSF 141-Child Care Reimbursement Request (09/2020) Form currently does not exist in CalSAWS System.

1.2 Requests

Add CSF 141-Child Care Reimbursement Request (09/2020) Form in the English and Spanish Languages for all 57 migration counties.

1.3 Overview of Recommendations

1. Add CSF 141-Child Care Reimbursement Request (09/2020) Form in English and Spanish Languages to CalSAWS System for all 57 migration counties.
2. Update Child Care Certificate Detail page to remove Generate CCRR button for Los Angeles County.
3. Update Child Care Certificate Detail page to rename Generate CCRR button to Generate CSF 141 for all 57 migration counties.
4. Update Child Care Certificate Detail page to generate CSF 141 Form when Generate CSF 141 button is clicked.
5. Add Daily Batch Trigger to generate CSF 141-Child Care Reimbursement Request (09/2020) Form in English and Spanish.

1.4 Assumptions

1. Migration of CalWIN counties BRM Address effort will be handled by subsequent SCR CA-217127.
2. SCR CA-214894 adds functionality to create a task when certain forms are received. CSF 141 is one of the forms which will be updated as part of this SCR.

2 RECOMMENDATIONS

2.1 Add CSF 141-Child Care Reimbursement Request (09/2020) Form

2.1.1 Overview

This section will cover the updates needed to add CSF 141 Form to CalSAWS for all 57 migration counties.

State Form: CSF 141

Programs: Child Care

Attached Forms: N/A

Forms Category: Form

Languages: English, Spanish

2.1.2 Description of Change

Create a new CSF 141-Child Care Reimbursement Request Form that can be generated from the CalSAWS System for all 57 migration counties.

1. Create CSF 141 Form XDP.

Form Header: CalSAWS Standard Header (1st and 3rd pages)

Form Title: Child Care Reimbursement Request

Form Number: CSF 141

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #1

2. Add the CSF 141 – Child Care Reimbursement Request Form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, Request Month, and Language.

CSF 141 Form will populate the following information when generated from the Template Repository apart from Customer and Worker Information.

Section	Field	Description	Editable Y/N
<1>	Request Month	Populate with Request Month Selected on the Document Parameters page.	Y

		Format: January, 2020	
--	--	-----------------------	--

CSF 141 Form will populate the following information when generated from Child Care Certificate Detail page, and Batch. CalSAWS Standard Header will be populated with Customer and Worker Information.

Section	Field	Description	Editable Y/N
<1>	Month	Populate with Request Month selected on the Document Parameters page when generated from Child Care Certificate Detail page and will populate with Current Month when generated through Batch. Format: January, 2020	Y
<2>	Certificate ID	Populate with Certificate ID from Child Care Certificate Detail page	N
<3>	Parent/Guardian	Primary Person's name from Child Care Certificate Detail page	Y
<4>	Parent Home Phone	Primary Person Home Phone Number from Child Care Certificate Detail page	Y
<5>	Parent Work Phone	Primary Person Work Phone Number from Child Care Certificate Detail page	Y
<6>	Parent Cell Phone	Primary Person Cell Phone Number from Child Care Certificate Detail page	Y
<7>	Child's Name	Populate with Child's Name from Child Care Certificate Detail page	Y
<8>	Age	Calculate Child's Age as of Child Care Period From Date Format: if the Age of the Child is 8 Year then populate '8'	Y

<9>	Name	Provider Name from Child Care Certificate Detail page	Y
<10>	Address	Provider Address from Child Care Certificate Detail page	Y
<11>	Phone Number	Provider Phone Number from Child Care Certificate Detail page	Y

3. Add the following barcode options to the CSF 141 Form:
 Note: CSF 141 Form will not have any barcodes when generated from Template Repository.

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

4. Add the following print options to the CSF 141 Form when it is generated from Template Repository:

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

5. Add the following print options to the CSF 141 Form when it is generated from Child Care Certificate Detail page:

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): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: BRM (BRM Header)

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

Clock Indicator: Yes

Post to YBN/C4Y: Yes

6. Populate Centralized BRM Address on CSF 141 Form with the following:
 1. CSF 141 Form needs to be routed back to the respective BRM office addresses migrated with SCR CA-201214 (CT 1622) for 57 migration counties.

2.2 Update Child Care Certificate Detail page to generate CSF 141 Form

2.2.1 Overview

With this effort CSF 141 Form will be triggered from Child Care Certificate Detail page when clicking the “Generate CSF 141” Button for all 57 migration counties.

2.2.2 Child Care Certificate Detail Mockups

Child Care Certificate Detail

*- Indicates required fields

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

[Images](#)
[Generate CSF 141](#)
[Generate Form](#)
[View Payment Calculation List](#)
[Copy](#)

Primary: Rose Tenaglia	Funding Source: Stage 1	Certificate ID: 808912218
Certificate Period: * From: 02/29/2020 To: 08/31/2020		
Child's Name: * Kathleen Hernandez 3	Status: * Approved	

Schedule

Regular

Su	Mo	Tu	We	Th	Fr	Sa	Time In	Time Out	
	✓	✓	✓	✓			11:00 AM	9:00 PM	10.0
0.0	10.0	10.0	10.0	10.0	0.0	0.0	Total: 40.0	Ratio: 30.0%	

Vacation

Su	Mo	Tu	We	Th	Fr	Sa	Time In	Time Out

Variable

Provider: * 899341251 Org Name	Service: * TrustLine Exempt Child Home	County: * San Bernardino
Payee: * Same as Provider	Backup Provider: * No	

Rates

Schedule Type	Care Type	Rate Type	Provider Rate	RMR	Co-Pay
Regular	Full Time	Weekly	300.00	129.75	170.25
Regular	Part Time	Hourly	10.00	2.88	7.12

Notes:

Materials/Registration Fee: 0.00	Number of Months the Fee will Cover:
Apply Family Fee to this Certificate: * No	Sign Date: 03/06/2020

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

[Images](#)
[Generate CSF 141](#)
[Generate Form](#)
[View Payment Calculation List](#)
[Copy](#)

Last Updated On 06/30/2020 9:20:45 AM By: 7024

This Type_1 page took 7.08 seconds to load.

Figure 2.2.1 – Generate CSF 141 Button on Child Care Certificate Detail Page

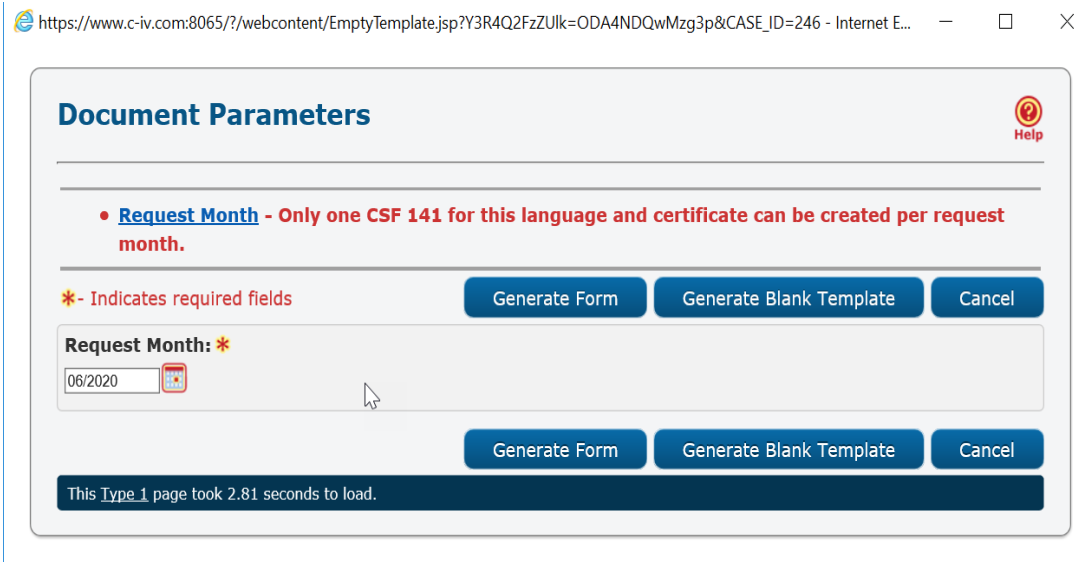


Figure 2.2.2 – Document Parameters Page Validation on Child Care Certificate Detail Page

2.2.3 Description of Changes

1. Update Child Care Certificate Detail page to rename “Generate CCRR” button to “Generate CSF 141” and generate CSF 141 for all 57 migration counties when Generate CSF 41 button is clicked – See the mockup Figure 2.2.1 for Generate CSF 141 button reference.

2. Remove “Generate CCRR” button for Los Angeles county.

3. **Required Form Input:** Request Month

Validation: A validation message as shown in Figure 2.2.2 will be thrown if there exists a CSF 141 Form for the same Request Month and Language.

2.2.4 Page Location

- **Global:** Child Care
- **Local:** Case Summary
- **Task:** Child Care Certificates

2.2.5 Security Updates

1. Security Rights
No impacts to this section.

2. Security Groups

No impacts to this section.

2.2.6 Page Mapping

No impacts to this section.

2.2.7 Page Usage/Data Volume Impacts

No impacts to this section.

2.3 Child Care Customer Reporting Detail page

2.3.1 Overview

The Child Care Customer Reporting Detail page will be updated to include the CSF 141 report type.

2.3.2 Child Care Customer Reporting Detail Mockup

Child Care Customer Reporting Detail

*- Indicates required fields

Edit Close

Request Month: 09/01/2020 **Certificate Id:** [808703367](#)

County Completeness Determination	This Report
Does the information on the CSF 141 alone or combined with the information from previously submitted CSF 141 for the same service month, equal a complete and correct CSF 141? *	

Report Status History

Status	Date	Updated by
Received	09/29/2020	280471
Sent	08/22/2020	186481
Generated	08/22/2020	203449

This Type 1 page took 0.79 seconds to load.

Figure 2.3.1 CSF 141 Child Care Customer Reporting Detail Page View Mode

Child Care Customer Reporting Detail

*- Indicates required fields

Save and Return

Cancel

Request Month:

09/01/2020

Certificate Id:

[808703367](#)

County Completeness Determination	This Report
Does the information on the CSF 141 alone or combined with the information from previously submitted CSF 141 for the same service month, equal a complete and correct CSF 141? *	<input type="text" value="- Select -"/> Yes No N/A

Report Status History		
Status	Date	Updated by
Received	09/29/2020	280471
Sent	08/22/2020	186481
Generated	08/22/2020	203449

This [Type 1](#) page took 0.98 seconds to load.

Figure 2.3.2 Child Care Customer Reporting Detail Page Edit Mode

- **County Completeness Determination - Field is required. Please enter a value.**

Child Care Customer Reporting Detail

*- Indicates required fields

Save and Return Cancel

Request Month:

09/01/2020

Certificate Id:

[808703367](#)

County Completeness Determination	This Report
Does the information on the CSF 141 alone or combined with the information from previously submitted CSF 141 for the same service month, equal a complete and correct CSF 141? *	
	<input type="text" value="- Select -"/>



Report Status History		
Status	Date	Updated by
Received	09/29/2020	280471
Sent	08/22/2020	186481
Generated	08/22/2020	203449

This Type_1 page took 0.98 seconds to load.

Figure 2.3.3 CSF 141 Child Care Customer Reporting Detail Page Validation Mode

- [Eligibility Determination](#) - Field is required. Please enter a value.
- [Eligibility Determination](#) - Field is required. Please enter a value.
- [Eligibility Determination](#) - Field is required. Please enter a value.

Child Care Customer Reporting Detail

*- Indicates required fields

Save and Return Cancel

Request Month:

09/01/2020

Certificate Id:

808703367

County Completeness Determination	This Report
Does the information on the CSF 141 alone or combined with the information from previously submitted CSF 141 for the same service month, equal a complete and correct CSF 141? *	<input type="text" value="Yes"/>

Reimbursement Eligibility Determination	This Report
1. Were the Child Care Services needed? *	<input type="text" value="-Select-"/>
2. Was the customer participating in a county-approved activity during the hours of care? *	<input type="text" value="-Select-"/>
3. Are all other eligibility requirements satisfied? *	<input type="text" value="-Select-"/>

Report Status History		
Status	Date	Updated by
Received	09/29/2020	280471
Sent	08/22/2020	186481
Generated	08/22/2020	203449

This Type 1 page took 1.46 seconds to load.

Figure 2.3.4 CSF 141 Child Care Customer Reporting Detail Page Validation Mode

Child Care Customer Reporting Detail

*- Indicates required fields

Save and Add Payment Calculation

Save and Return

Cancel

Request Month:

09/01/2020

Certificate Id:

[808703367](#)

County Completeness Determination	This Report
Does the information on the CSF 141 alone or combined with the information from previously submitted CSF 141 for the same service month, equal a complete and correct CSF 141? *	Yes ▾

Reimbursement Eligibility Determination	This Report
1. Were the Child Care Services needed? *	Yes ▾
2. Was the customer participating in a county-approved activity during the hours of care? *	Yes ▾
3. Are all other eligibility requirements satisfied? *	Yes ▾

Report Status History		
Status	Date	Updated by
Received	09/29/2020	280471
Sent	08/22/2020	186481
Generated	08/22/2020	203449

Save and Add Payment Calculation

Save and Return

Cancel

This Type 1 page took 1.46 seconds to load.

Figure 2.3.5 CSF 141 Child Care Customer Reporting Detail Page Edit Mode with Reviewed Status

Child Care Customer Reporting Detail

*- Indicates required fields

Add Payment Calculation

Edit

Close

Request Month:

09/01/2020

Certificate Id:

[808703367](#)

County Completeness Determination	This Report
Does the information on the CSF 141 alone or combined with the information from previously submitted CSF 141 for the same service month, equal a complete and correct CSF 141? *	Yes

Reimbursement Eligibility Determination	This Report
1. Were the Child Care Services needed? *	Yes
2. Was the customer participating in a county-approved activity during the hours of care? *	Yes
3. Are all other eligibility requirements satisfied? *	Yes

Report Status History		
Status	Date	Updated by
Reviewed	09/29/2020	280471
Received	09/29/2020	280471
Sent	08/22/2020	186481
Generated	08/22/2020	203449

Add Payment Calculation

Edit

Close

This Type 1 page took 0.62 seconds to load.

Figure 2.3.6 CSF 141 Child Care Customer Reporting Detail Page View Mode with Reviewed Status

2.3.3 Description of Changes

1. Add a new Child Care Customer Reporting Detail page for the CSF 141 Form as shown in Figures 2.3.1 to 2.3.6:
 - a. The Request Month will be the month when the CSF 141 is due. It will be in the 'MM/DD/YYYY' format. Note: Report month will always be first day of the month. Example: if the Form is generated on 09/21/2020, report month will be 09/01/2020.

© 2020 CalSAWS. All Rights Reserved.

- b. The Date Received field will be populated with the date of when the Child Care Customer Reporting Detail is marked as 'Received'.
- c. See below table for Child Care Customer Reporting Detail Status

Child Care Customer Reporting Detail Questions	Answer	Action
County Completeness Determination	Yes	Display all 3 "Reimbursement Eligibility Determination" questions – See Fig 2.3.4 for reference
County Completeness Determination	No	Mark the Child Care Customer Reporting Detail status as Incomplete
County Completeness Determination	N/A	Mark the Child Care Customer Reporting Detail status as Not Applicable
County Completeness Determination	Not Answered	If none of the options are selected and clicked on save button should display "County Completeness Determination – Field is required. Please enter a value." validation message. See Figure 2.3.3 for reference.
Reimbursement Eligibility Determination Questions	Yes	1) If all 3 questions under Reimbursement Eligibility Determination section are marked as 'Yes' then set the

Child Care Customer Reporting Detail Questions	Answer	Action
		Reporting Status as Reviewed 2) Display 'Add Payment Calculation' and 'Save and Add Payment Calculation' button on Customer Reporting Detail page – See Fig 2.3.5 for Edit Mode and 2.3.6 for View Mode.
Reimbursement Eligibility Determination Questions	No	If at least 1 question under Reimbursement Eligibility Determination section is marked as 'No' then set the Reporting Status as 'Denied'
Reimbursement Eligibility Determination Questions	Not Answered	If none of the options are selected and clicked on save button should display "Reimbursement Eligibility Determination – Field is required. Please enter a value." validation message. See Figure 2.3.4 for reference.
Add Payment Calculation	All the questions are marked as "Yes", and the Status is in "Reviewed"	This will activate the Add Payment Calculation button as shown in Figure 2.3.5 (edit mode)

Child Care Customer Reporting Detail Questions	Answer	Action
		and 2.3.6 (view mode). Clicking on Add Payment Calculation button will route the user to Child Care Payment Calculation Detail page which needs to be Accepted and Approved to mark the Customer Reporting as Complete.

2.3.4 Page Location

- **Global: Child Care**
- **Local: Reporting**
- **Task: Child Care Customer Reporting**

2.3.5 Security Updates

1. Security Rights
No impacts to this section.
2. Security Groups
No impacts to this section.

2.3.6 Page Mapping

No impacts to this section.

2.3.7 Page Usage/Data Volume Impacts

No impacts to this section.

2.4 Batch - Add a new CSF 141 Form Sweep Job

2.4.1 Overview

The purpose of this recommendation is to add a new daily batch job which will generate CSF 141 Form for each ongoing approved certificate.

2.4.2 Description of Change

1. Add a code category (CTCR) 942 - Form Sweep Codes for the CSF 141 Form Sweep.

Journal Entry	Description
New/Update	New
Category Id	942
Short Description	Child Care Reimbursement Request
Long Description	Child Care Reimbursement Request
Trigger Condition	CSF 141 Form will be generated for each ongoing approved certificate

2. Add a new CSF 141 Form Sweep Job. This new job will identify all eligible cases to which CSF 141 Form has to be generated and sent.
 - a. The case should have Active Child Care program for current month.
 - b. There exists a Service Arrangement Certificate in Approved status in current month.
 - c. Exclude the cases on the following conditions:
 - i. Using entries in GENERATE_DOC and CUST_RPT tables, the batch will exclude Form that have already been printed, even if it's marked "Not Applicable".
Note: This exclusion is based upon the unique combination of the following for a single case:
 1. Service Arrangement
 2. Effective Month
 3. Document/LanguageExample 1: If an English CSF 141 was created by a worker for the month of 09/2020 for Service Arrangement A, the batch process will not create another such Form. If the customer's language has changed to Spanish, the batch

process would create a Spanish CSF 141 for the same Service Arrangement and month.

Example 2: If an English CSF 41 was created by a worker for the month of 09/2020 for Service Arrangement A, and Service Arrangement B was added to the case prior to the batch process running, the batch process would create an English CSF 141 for Service Arrangement B only.

- ii. The batch will generate Form for the current month if any part of the certificate overlaps with the current month.
- iii. When the batch is running at the end of the month (10 calendar days before the end of the month or later), it will also generate Form for the next report month if any part of the Certificate overlaps with it.

2.4.3 Execution Frequency

This will be a new Daily batch job.

2.4.4 Key Scheduling Dependencies

This job will run before the Form Generation Thread Jobs.

2.4.5 Counties Impacted

This job will run for all 57 migration counties.

2.4.6 Data Volume/Performance

No impacts to this section.

2.4.7 Failure Procedure/Operational Instructions

No impacts to this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 141	CSF141_EN.pdf CSF141_SP.pdf

--	--	--	--

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2591	<p>Original:</p> <p>The CONTRACTOR shall migrate the CCRR 100 CIV - Child Care Reimbursement to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> 1) Add the CalSAWS standard header information 2) Add "Child Care Provider Type" in the "Provider" section as an editable field for worker to manually enter the Child Care Provider Type 3) Add heavy bold the lines around the "In" section/column and the "Additional Time Out/Time In" section/column 4) Update the form number from "CCRR 100 CIV" to CalSAWS standard naming/numbering format <p>The CONTRACTOR shall migrate the ability to generate CCRR 100 from the Manual Reimbursement Request</p>	<ol style="list-style-type: none"> 1. Estimate is for migrating the new form in English and Spanish along with adding batch and online triggers. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 5. Child Care pages in CalSAWS behaves exactly like C-IV. Estimate does NOT include any effort to update the online page content. 	<p>With SCR CA-215016, CSF 141 – Child Care Reimbursement Request (09/2020) will be added to CalSAWS System and will be generated from Child Care Certificate Detail page for all 57 migration counties.</p>

<p>page in the CalSAWS Software for the 58 Counties.</p> <p>The CONTRACTOR shall migrate the batch trigger that will generate a CCRR 100 form for each ongoing Approved Child Care Certificate in the CalSAWS Software and make it configurable for all 58 Counties. The counties will have the option to opt in or out of the batch at the time of migration.</p> <p>Revised:</p> <p>The CONTRACTOR shall add the CSF 141 - Child Care Reimbursement to the CalSAWS Software for all 57 Migration Counties with the following updates:</p> <ol style="list-style-type: none"> 1) Add the CalSAWS standard header information 2) Add "Child Care Provider Type" in the "Provider" section as an editable field for worker to manually enter the Child Care Provider Type 3) Add heavy bold the lines around the "In" section/column and the "Additional Time Out/Time In" section/column <p>The CONTRACTOR shall migrate the ability to generate CSF 141 from</p>		
---	--	--

	<p>the Manual Reimbursement Request page in the CalSAWS Software for the 57 Migration Counties.</p> <p>The CONTRACTOR shall migrate the batch trigger that will generate a CSF 141 form for each ongoing Approved Child Care Certificate in the CalSAWS Software and make it configurable for all 57 Migration Counties. The counties will have the option to opt in or out of the batch at the time of migration.</p>		
--	--	--	--

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216739

Medi-Cal Renewals Listing Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Ravneet Bhatia; Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/31/2020	1.0	Initial Version	Esequiel Herrera-Ortiz
09/08/2020	1.1	Updates made per Build, ST, QA, BA review.	Esequiel Herrera-Ortiz

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	5
	1.4 Assumptions	5
2	Recommendations.....	6
	2.1 Medi-Cal Renewals Listing Report	6
	2.1.1 Overview	6
	2.1.2 Medi-Cal Renewals Listing Report Mockup.....	6
	2.1.3 Description of Change.....	6
	2.1.4 Report Location	19
	2.1.5 Counties Impacted	19
	2.1.6 Security Updates.....	19
	2.1.7 Report Usage/Performance	19
3	Supporting Documents	20
4	Requirements.....	21
	4.1 Project Requirements.....	21
	4.2 Migration Requirements.....	21
5	Migration Impacts	22
6	Outreach.....	23
7	Appendix.....	24

1 OVERVIEW

The Medi-Cal Renewals Listing Report is a daily scheduled report that captures the latest information of the entire population of cases that have a Medi-Cal RE due. Four versions of the report are generated daily.

Version 1 – Generates for the next RE Due Month.

Version 2 – Generates for the current RE Due Month.

Version 3 – Generates for the prior RE Due Month.

Version 4 – Generates for two months prior RE Due Month.

This document describes the changes that will be made to the existing Medi-Cal Renewals Listing Report in order to aid in the daily process of Medi-Cal line operations workload.

1.1 Current Design

The report population is any Medi-Cal program which has a Medi-Cal renewal (RE) due in a given month, whether (1) the RE was processed or (2) is to be processed through RE packet tracked in LRS or (3) the RE has been Auto-Authorized by an LRS CalHEERS interface batch.

The report does not provide adequate columns needed to assist workers with the daily processing of Medi-Cal renewals and for related Medi-Cal operations.

The report does not provide information on delinquent REs.

1.2 Requests

Update the Medi-Cal Renewals Listing Report to add additional information that will assist line staff in the processing of Medi-Cal renewals. Further, the enhancements will make the report more useful for managers and supervisors, by providing them additional data and timeframes to control the processing of renewals at the office, unit, and worker level. With the proposed recommendations, line staff will be better equipped to identify renewals that have already been dispositioned and renewals that require additional follow-up at any given time.

The report which generates for the current RE Due Month will now include a new sheet which captures delinquent REs.

1.3 Overview of Recommendations

1. Remove the column named 'Office Number' from all sheets. The existing 'Office Name' column is adequate.
2. Add the following columns to the 'Details Report' sheet.
 - Packet Received Date
 - Discontinuance Date
 - Soft Pause
 - Deemed Eligible Child DOB
 - MC 355 Due Date
 - MC 355 Reminder Sent Date
 - MC 355 Status
 - MC 355 Action Date
 - Latest Imaged Document Date
3. Add a new sheet which will capture Delinquent REs for the version of the report that generates for the current RE Due month.
4. Add the Former Foster Youth (FFY) Renewal Packet to the list of Renewal packets captured under the column 'Packet Type'.
5. Update the current logic for the 'Renewal Action' column to include two new options. These two new options were previously captured under 'No Packet':
 - 'No Packet-MSP SSI' if all active program persons are being aided under MSP aid code 80 and all active program persons are receiving SSI. This case requires additional follow-up by eligibility staff.
 - 'No Packet-Aid Code 38' if all active program persons are being aided under aid code 38. This case requires additional follow-up by eligibility staff.
6. Exclude Transitional Medi-Cal (TMC) cases from the listing if the entire household is being aided under TMC.

1.4 Assumptions

1. The report's system logo will be updated during the re-platform effort.


2 RECOMMENDATIONS

2.1 Medi-Cal Renewals Listing Report

2.1.1 Overview

This section will outline only the updates that will be made to the Medi-Cal Renewals Listing Report.

2.1.2 Medi-Cal Renewals Listing Report Mockup

 Medi-Cal Renewals Listing Report			
Los Angeles			
Run Date: AUG-12-20 11:02 PM			
Redet Due Month: 09/2020			
Summary Report			
Total Cases		1	2
Office Name	Renewals (Mailed Out)	No Renewal Packet (Not Mailed Out)	Renewals Auto-Authorized
002 Glendale	1	2	2

*Note the mockup is attached in the Supporting Documents section.

*Note: The production version of the report might have small variances in cosmetics due to the possible need to accommodate data or changes which are introduced by the reporting tool.

2.1.3 Description of Change

1. Update all sheets to exclude programs where every **active** program person is aided under the Transitional Medi-Cal (TMC) program. This is determined by one of the TMC aid codes.

Code-184	Short Description
39	39 - Initial TMC-Full
3T	3T - Initial TMC-ESO/Pregnancy
59	59 - Continuing TMC-Full

Code-184	Short Description
5T	5T - Continuing TMC-ESO/Pregnancy

2. Include the following renewal packet as a Medi-Cal renewal packet type:

Code-329	Short Description
FY	Former Foster Youth Packet

This change will be reflective on all sheets when displaying packet related information.

3. Make the following updates to the 'Summary Report' sheet.
 - a. Update the header to be in the following format. Currently the header only includes a single line which displays the report title and system logo. This is to make the header on all sheets the same format.

Line	Field Name	Field Description
1	System Logo and Report Title	The system logo followed by the report title. See the attached mockup in the Supporting Documents section for reference.
2	County Name	The county name for which the report was generated for. Format: [County Name]
3	Run Date	The date the report was ran on. Format: Run Date: MON-DD-YY HH:MM AM/PM
4	Redet Due Month	The reporting month the data was captured for. Format: Redet Due Month: MM/YYYY

- b. Remove the 'Office Number' column from the sheet.
 - c. Update the 'No Renewal Packet (Not Mailed Out)' count column to include the REs with a Renewal Action of 'No Packet – MSP SSI' and 'No Packet – Aid Code 38'. This update should be reflected in the 'Total Cases' total located above the column.
4. Make the following updates to the 'Office Summary Report' sheet.
 - a. Remove the 'Office Number' column from the sheet.
 - b. Update the 'Packet Submit Month' column to be formatted in date format rather than character string format. This allows users to use date filters which provides chronological ordering rather

than alphanumerical order. This should also provide filters which are collapsed by year, month and day.

Format: MM/YYYY

- c. The existing Renewal Action column will be updated to include two new Renewal Action types: **'No Packet – MSP SSI'** and **'No Packet – Aid Code 38'**. The two new renewals types should be included in the 'Total Cases' total located at the top of the sheet.

Field Name	Field Description
Renewal Action	<p>Displays the renewal action of the program as of the report run date. Values will be one of the following five:</p> <ul style="list-style-type: none"> • 'Auto-Authorized' – No packet was sent out (there is no packet information available) and the RE Due Date was advanced by e-hit through batch. • 'No Packet - MSP SSI' – No packet was sent out and all active program persons are being aided under MSP SSI aid code 80 and all active program persons are receiving SSI. • 'No Packet – Aid Code 38' - No packet was sent out and every active program person is being aided under aid code 38. • 'No Packet' – No packet was sent out for the RE Due month and there was not an e-hit Auto-Authorization and the program does not meet the requirements for 'No Packet – MSP SSI' or 'No Packet – Aid Code 38'. • 'Renewal' – There is a RE Due Date in the report month and there is packet information available for the RE Due Date

- 5. Make the following updates to the 'Details Report' Sheet.
 - a. The 'Office Number' column will be removed from the sheet.
 - b. The Packet Type column will now include 'Former Foster Youth Packet' as a possible value.
 - c. Add the following columns to the sheet.

Field Name	Field Description
Packet Received Date	Displays the latest received date of the renewal packet associated to the RE due month.

	Format: MM/DD/YYYY
Discontinued Effective Date	Displays the effective date of the discontinuance for any discontinuance which is effective. Format: MM/DD/YYYY The field will be blank if the program has not been discontinued or if an approved rescission has been applied to the program.
Discontinued Action Date	Displays the latest action date related to the program's discontinuance or denial. Format: MM/DD/YYYY The field will be blank if the program has not been discontinued / denied or if an approved rescission has been applied to the program.
Soft Pause	Displays 'Y' if any individual in the case is under Soft Pause in the latest Determination of Eligibility Response (DER) else the column will display 'N'. The Soft Pause will only be determined by any DER which has a Benefit Month \geq the RE Due Month minus 1 Month. If multiple DERs are found with a Benefit Month \geq RE Due Month minus 1 Month, then the one with the greatest created on date will be chosen.
Deemed Eligible Child DOB	Displays the birth date of the youngest active deemed eligible (DE) child on the program. Format: MM/DD/YYYY This field will be blank if the program has no active DE Child.
MC 355 Due Date	Displays the due date of the last generated MC 355 for the program. The report will only search for MC 355s which have a generated date \geq RE Due Month minus 2 months. Format: MM/DD/YYYY The field will be blank if no record exists.
MC 355 Reminder Sent Date	Displays the date the latest MC 355 Reminder Notice was sent for the program. The report will only search for MC 355 Reminder Notices which have a generated date \geq RE Due Month minus 2 months. Format:

	MM/DD/YYYY The field will be blank if no record exists.
MC 355 Status	Displays the status of the latest MC 355 generated for the program. The report will only search for MC 355s which have a generated date >= RE Due Month minus 2 months. The field will be blank if no record exists. Possible Values (Category 10540): <ul style="list-style-type: none"> • Pending • Sent • Complete • Incomplete • Not Applicable Note: The above listed are the current possible status values for the MC 355, but the report logic will not restrict the data to these values. If later status is introduced the report will automatically pick up the new value.
MC 355 Action Date	The date the status was applied to the MC 355. The field will be blank if no record exists. Format: MM/DD/YYYY
Latest Imaged Document Date	Displays the most recent date the latest MC 355 or Non-Standard document/verification was imaged. The date will be stored in such a way that it will no longer update if one of the following conditions is true. <ul style="list-style-type: none"> • The current packet status is 'Complete-EDBC Accepted and the RE Date has advanced • The current packet status is Incomplete, and the document/verification was received more than 100 days from the last day of the RE Due Month. • The current packet status is 'Reviewed-Ready to Run EDBC' and the program Status is Active, or the latest program application event is Discontinued. Format: MM/DD/YYYY The field will be blank if no record exists.

*Technical Note – All date columns should be in date format and can be sorted in chronological order.

d. The following existing columns will be updated all follows:

Field Name	Field Description
Renewal Action	<p>Displays the renewal action of the case as of the report run date. Values will be one of the following five:</p> <ul style="list-style-type: none"> • Auto-Authorized – No packet was sent out (there is no packet information available) and the RE Due Date was advanced by e-hit through batch. • No Packet - MSP SSI – No packet was sent out and all active program persons are being aided under MSP SSI aid code 80 and all active program persons are receiving SSI. • No Packet – Aid Code 38 - No packet was sent out and every active program person is being aided under aid code 38. • No Packet – No packet was sent out for the RE Due month and there was not an e-hit Auto-Authorization and the program does not meet the requirements for 'No Packet – MSP SSI' or 'No Packet – Aid Code 38'. • Renewal – There is a RE Due Date in the report month and there is packet information available for the RE Due Date
Packet Status	<p>Displays the current status of the renewal packet as of when the report was generated. Possible statuses include (Category: 258):</p> <ul style="list-style-type: none"> • Sent • Received • Incomplete • Reviewed – Ready to Run EDBC • Error • Generated • Complete – EDBC Accepted • Not Applicable <p>Note: The report will not restrict based on these values. If a later customer report status is introduced, the report will automatically display the value.</p>

	<p>If no packet information exists, then the column will reflect the same value as the Renewal Action column. Possible values are:</p> <ul style="list-style-type: none"> • Auto-Authorized • No Packet - MSP SSI • No Packet – Aid Code 38 <p>No Packet</p>
--	---

e. Update the logic for the static 'Total No Packet' total as follows:

Total Field	Field Description
Total No Packet	<p>Total count of all cases that have a Renewal Action of:</p> <ul style="list-style-type: none"> • No Packet • No Packet - MSP SSI • No Packet – Aid Code 38

6. Create a new sheet titled 'Delinquent REs Report'. See the attached mockup in the supporting documents for reference. The report will have the following characteristics:

- The sheet will only be populated and be available when the report is generated for the current RE Due month.
- The sheet will have the following header:

Line	Field Name	Field Description
1	System Logo and Report Title	The system logo followed by the report title. See the attached mockup in the Supporting Documents section for reference.
2	County Name	The county name for which the report was generated for. Format: [County Name]
3	Run Date	The date the report was ran on. Format: Run Date: MON-DD-YY HH:MM AM/PM
4	Redet Due Month	The reporting month the data was captured for. Format: Redet Due Month: MM/YYYY

c. The sheet will capture the following base population:

Program Status	Condition
Active	<ul style="list-style-type: none"> • Program is Medi-Cal • Program Status is 'Active'

	<ul style="list-style-type: none"> RE Due Month is less than The Reporting month.
Pending	<ul style="list-style-type: none"> Program is Medi-Cal Program Status is 'Pending' RE Due Month is prior to the current report month Program was Discontinued with a reason is 'Failed to Complete Redetermination' or 'Failed to Complete Determination'.
Discontinued	<ul style="list-style-type: none"> Program is Medi-Cal Program status is 'Discontinued' RE Due Month is prior to current report month Program status reason is 'Failed to Complete Redetermination' or 'Failed to Complete Determination' from RE Due Month to 3 Months. RE Packets status after discontinued event date from RE Due Month to 3 months equals 'Incomplete' and/or MC 355 or Non-Standard Document/Verification received after discontinued event date from RE Due Month to 3 months; or RE Packets status after discontinued event date from RE Due Month to 3 months equals 'Received' or 'Reviewed-Ready to Run EDBC'. Note: Discontinued record must no longer be picked up on month 4 after RE Due Month.
Denied	<ul style="list-style-type: none"> Program is Medi-Cal Program status is 'Denied' RE Due Month is prior to current report month; Program was Denied from RE Due Month to 3 Months; Program was previously Discontinued for 'Failed to Complete Redetermination' or 'Failed to Complete Determination' from RE Due Month to 3 months; and

	<ul style="list-style-type: none"> RE Packets status after denied event date from RE Due Month to 3 months equals 'Incomplete' and/or MC 355 or Non-Standard Document/Verification received after denied event date from RE Due Month to 3 months; or RE Packets status after denied event date from RE Due Month to 3 months equals 'Received' or 'Reviewed-Ready to Run EDBC'. Note: Denied record must no longer be picked up on month 4 after RE Due Month.
--	---

d. The sheet will include the following totals at the top of the sheet.

Total Field	Field Description
Total Cases	Count of all cases captured in the sheet.
Total Renewals	Total count of all cases that have a Renewal Action of 'Renewal'.
Total No Packet	Total count of all cases that have a Renewal Action of: <ul style="list-style-type: none"> No Packet No Packet - MSP SSI No Packet – Aid Code 38
Total Auto-Authorized	Total count of all cases that have a Renewal Action of 'Auto-Authorized'.

e. The sheet will provide the following columns

Field Name	Field Description
Renewal Action	Displays the renewal action of the program as of the report run date. Values will be one of the following five: <ul style="list-style-type: none"> 'Auto-Authorized' – No packet was sent out (there is no packet information available) and the RE Due Date was advanced by e-hit through batch. 'No Packet - MSP SSI' – No packet was sent out and all active program persons

	<p>are being aided under MSP SSI aid code 80 and all active program persons are receiving SSI.</p> <ul style="list-style-type: none"> • 'No Packet – Aid Code 38' - No packet was sent out and every active program person is being aided under aid code 38. • 'No Packet' – No packet was sent out for the RE Due month and there was not an e-hit Auto-Authorization and the program does not meet the requirements for 'No Packet – MSP SSI' or 'No Packet – Aid Code 38'. • 'Renewal' – There is a RE Due Date in the report month and there is packet information available for the RE Due Date
Office Name	The office name associated to the program assigned worker as of the report run date. If no worker is assigned, then the last known worker will be displayed.
Unit	The unit number associated to the program assigned worker as of the report run date. If no worker is assigned, then the last known worker information will be used.
Worker ID	The worker ID assigned to the program as of the report run date. If no worker is assigned, then the last known worker information will be used.
Case Name	The case name of the case.
Case Number	The case number of the case.
Primary Lang	The primary language of the primary applicant.
Home Phone	The most recent home phone number of the program person. This column will be blank if no record exists.
Other Phone	The most recent phone number of the program person that is not the Home phone number. This column will be blank if no record exists.

Packet Type	<p>The latest redetermination packet type sent out to the program person.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Former Foster Youth Packet • LTC MC RE Packet • MAGI MC Packet • Mixed MC RE Packet • MC 604 IPS Packet • MC RE Packet • MSP Packet • Non-MAGI Screening Packet • Pre-ACA MC RE Packet <p>This column will be blank if no record exists.</p>
Packet Sent Date	<p>Displays earliest date the renewal packet was sent.</p> <p>Format: MM/DD/YYYY</p> <p>This column will be blank if no packet has been sent.</p>
Packet Received Date	<p>Displays the latest received date related to the renewal packet associated to the RE due month.</p> <p>Format: MM/DD/YYYY</p> <p>This column will be blank if no record exists.</p>
Packet Submit Month	<p>Displays the month in which the renewal packet was due to be submitted.</p> <p>Format: MM/YYYY</p> <p>This column will be blank if no record exists.</p>
Packet Status	<p>Displays the current status of the renewal packet as of when the report was generated.</p> <p>Possible statuses include (Category: 258):</p> <ul style="list-style-type: none"> • Sent • Received • Incomplete • Reviewed – Ready to Run EDBC • Error • Generated • Complete – EDBC Accepted • Not Applicable <p>Note: The report will not restrict based on these values. If a later customer report status is</p>

	<p>introduced, the report will automatically display the value.</p> <p>If no packet information exists, then the column will reflect the same value as the Renewal Action column. Possible values are:</p> <ul style="list-style-type: none"> • Auto-Authorized • No Packet - MSP SSI • No Packet – Aid Code 38 • No Packet
Packet Status Date	<p>Displays the status date of the Packet Status that is being displayed.</p> <p>This column will be blank if no packet information exists.</p>
Reminder Notice Date	<p>The date the latest reminder was sent to the program person.</p> <p>This column will be blank if no reminder notice was sent.</p>
Current Program Status	<p>The current program status of the program.</p>
Discontinued / Denied Effective Date	<p>Displays the latest effective date related to the program's discontinuance or denial.</p> <p>Format: MM/DD/YYYY</p> <p>The field will be blank if the program has not been discontinued or if an approved rescission has been applied to the program.</p>
Discontinued / Denied Action Date	<p>Displays the latest action date related to the program's discontinuance or denial.</p> <p>Format: MM/DD/YYYY</p> <p>The field will be blank if the program has not been discontinued / denied or if an approved rescission has been applied to the program.</p>
RE Due Month	<p>The RE Due month of the delinquent RE.</p> <p>Format: MM/YYYY</p>
Soft Pause	<p>Displays 'Y' if any individual in the case is under Soft Pause in the latest Determination of Eligibility Response (DER) else the column will display 'N'.</p> <p>The Soft Pause will only be determined by any DER which has a Benefit Month >= the RE Due</p>

	<p>Month minus 1 Month. If multiple DEs are found with a Benefit Month \geq RE Due Month minus 1 Month, then the one with the greatest created on date will be chosen.</p>
Deemed Eligible Child DOB	<p>Displays the birth date of the youngest active deemed eligible (DE) child on the program. Format: MM/DD/YYYY This field will be blank if the program has no active DE Child.</p>
MC 355 Due Date	<p>Displays the due date of the last MC 355 generated for the program, which was generated for the program. The report will only search for MC 355s which have a generated date \geq RE Due Month minus 2 months. Format: MM/DD/YYYY The field will be blank if no record exists.</p>
MC 355 Reminder Sent Date	<p>Displays the date the latest MC 355 Reminder Notice was sent for the program. The report will only search for MC 355 Reminder Notices which have a generated date \geq RE Due Month minus 2 months. Format: MM/DD/YYYY The field will be blank if no record exists.</p>
MC 355 Status	<p>Displays the status of the last MC 355 generated for the program. The report will only search for MC 355s which have a generated date \geq RE Due Month minus 2 months. The field will be blank if no record exists. Possible Values (Category 10540):</p> <ul style="list-style-type: none"> • Pending • Sent • Complete • Incomplete • Not Applicable <p>Note: The above listed are the current possible status values for the MC 355, but the report logic will not restrict the data to these values. If later status is introduced the report will automatically pick up the new value.</p>
MC 355 Action Date	<p>The date the status was applied to the MC 355. The field will be blank if no record exists. Format: MM/DD/YYYY</p>

Latest Imaged Document Date	<p>Displays the most recent date the latest MC 355 or Non-Standard document/verification was imaged. The date will be stored in such a way that it will no longer update if one of the following conditions is true.</p> <ul style="list-style-type: none"> • The current packet status is 'Complete-EDBC Accepted and the RE Date has advanced • The current packet status is Incomplete, and the document/verification was received more than 100 days from the last day of the RE Due Month. • The current packet status is 'Reviewed-Ready to Run EDBC' and the program Status is Active, or the latest program application event is Discontinued. <p>Format: MM/DD/YYYY The field will be blank if no record exists.</p>
-----------------------------	--

2.1.4 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: Case Activity**

2.1.5 Counties Impacted

This report is specific for LA County but can be made available to other counties upon request.


2.1.6 Security Updates

No updates will be made to the report's security.

2.1.7 Report Usage/Performance

The report usage will remain the same.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Medi-Cal Renewals Listing Report Mockup	 Medi-Cal Renewals Listing Report Mock

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.1	LRS shall produce reports daily, weekly, monthly, quarterly, semi-annually, annually, and as needed, as specified by COUNTY.	This report satisfies a need to generate a report in a scheduled manure with information specified by the county.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
N/A					

6 OUTREACH

N/A

7 APPENDIX

N/A