

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216321 | DDID 1395

Update NHR, PVS, IFDS and IFDS Medical Reader and Validator jobs to process files from all 57 Migration Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

The purpose of this SCR is to update the existing IEVS New Hire Registry (NHR), Payment Verification System (PVS), Integrated Fraud Detection System (IFDS) and Integrated Fraud Detection System Medical (IFDS-M) abstract reader jobs in LRS/CalSAWS to process inbound files received from all 57 Migration counties.

1.1 Current Design

LRS/CalSAWS has automated batch jobs to read and process each IEVS abstract received in a file from IEVS. For NHR, PVS, IFDS and IFDS Medical abstracts, the result is either automated disposition or an automated assignment to an IEVS supervisor/worker for IFDS and NHR abstracts or program worker for PVS abstracts and when there is a discrepancy.

As part of DDID 1395 SCR CA-207329, the C-IV IEVS reader jobs for criminal IEVS abstracts (FF, CYA and NPM) and only the data retrieval logic from the C-IV reader jobs have been merged with the LRS/CalSAWS reader jobs.

As part of DDID 1395 SCR CA-212490 CalWIN counties were added to the LRS/CalSAWS reader jobs.

1.2 Requests

Update the LRS/CalSAWS NHR, PVS, IFDS, and IFDS Medical reader and validator jobs to read and process inbound files received from all 57 Migration Counties.

1.3 Overview of Recommendations

In order to read and process the abstracts in the NHR, PVS, IFDS and IFDS Medical inbound files from the 57 Migration counties the below changes to LRS/CalSAWS reader and validator jobs are required -

1. Merge the logic from the C-IV IFDS Medical reader job of retrieving data from the inbound file and saving it in the database with the LRS/CalSAWS reader job.
2. Merge the file processing logic from the C-IV reader jobs with the LRS/CalSAWS validator jobs.
3. Create a new Batch Property Change Request (BPCR) to allow the NHR, PVS, IFDS and IFDS Medical validator jobs to run for the 57 Migration counties.

1.4 Assumptions

1. IEVS Abstract jobs for Los Angeles County will NOT be changed as part of this SCR, including existing form trigger jobs.
2. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.
3. Form PA 2492 triggered by PVS validator job will be updated by CA-215095 and this form will be made available for all 57 migrating counties at the time of migration.

2 RECOMMENDATIONS

2.1 Update NHR, PVS, IFDS and IFDS Medical Reader Jobs

2.1.1 Overview

In LRS/CalSAWS, each of the IEVS abstracts for NHR, PVS, IFDS and IFDS Medical has a reader job (listed in table 2.1.2) that reads and saves the data from the incoming file into the database and a validator job (listed in table 2.1.3) that automates the abstract assignment, task creation, form generation and auto disposition logic for each of the abstracts received in the file.

In C-IV, each of the IEVS abstracts for NHR, PVS, IFDS and IFDS Medical has a reader job (listed in table 2.1.1) that reads and validates the abstracts from the incoming files.

In order to process the incoming files from the 57 Migration counties, updates need to be made to the PVS, NHR and IFDS validator jobs and IFDS Medical reader job,

2.1.2 Description of Change

1. Create a new Batch Property Change Request (BPCR) to allow the NHR, PVS, IFDS and IFDS Medical validator jobs (listed in table 2.1.3) to run for the 57 Migration counties.
2. Turn on the IFDS Medical reader job in LRS/CalSAWS (PIXXC408) to process inbound IFDS Medical files for the 57 Migration counties only.
3. Merge the reader logic from the C-IV IFDS Medical reader job (PIXXC402) with the LRS/CalSAWS IFDS Medical reader job (PIXXC408).
4. Update the IFDS Validator job to perform the below validations for the 57 Migration County IFDS abstracts
 - a. Compare demographic information:
Batch logic will compare the IEVS data with information in the database. The data elements to be compared will include the following:
 - i. First Name
 - ii. Last Name
 - iii. Gender
 - iv. SSN
 - v. Date of Birth

If the comparison fails, batch will assign the abstract to the worker selected in the IEVS Batch Assignment Configuration page.

Batch will also create a new journal entry with the following format:

"{abstract type} abstract X/XX/XXXX run date received with demographic mismatches: {dataMisMatch}."

- b. Determine if the person is a student or non-needy caretaker relative:
Batch will determine if the person is a student or a non-needy caretaker. A student must be under 18 years of age and attending primary or secondary education. A non-needy caretaker relative must be a payee on the CalWORKs program, a relative who is not a biological or adoptive parent and is not eligible for aid on any cash aid programs (CalWORKs, Refugee Cash Assistance, Immediate Need, General Assistance/General Relief, Cash Assistance Program for Immigrants (CAPI), Diversion).
If the person is determined to be a student or non-needy caretaker relative, batch will add a finding with a review type of 'Closed - No Findings', and add a new journal entry in the following format:

"{abstract type} abstract with X/XX/XXXX run date received for individual with SSN ending with XXXX is determined to be No Impact - {earningType}."

- c. Determine if income discrepancies are within tolerance:
The IFDS validator batch job will compare the income reported on the abstract to the income associated to the recipient. The batch will check if the income discrepancy is within tolerance:
- i. If the earnings are within \$1,000 for CalWORKs and CalFresh programs, then the system will generate a finding with a discrepancy set to "No" and batch will add a finding with a review type of 'Closed - No Findings', and add a new journal entry with the following format:
- "IFDS 440/IFDS440M abstract for Fourth Quarter XXXX received for individual with SSN ending with XXXX is determined to be No Impact - Income previously reported."***

5. Form SAWS 30 will be triggered for all 58 counties when an NHR abstract is received through the inbound file except for Non-Needy Caretaker, Student and No Discrepancy in the employer.

Note 1 : The IFDS Medical reader job in LRS/CalSAWS (PIXXC408) is currently turned off for Los Angeles County.

Note 2: The validations in the PVS and NHR validator jobs in LRS/CalSAWS will be applicable to all 57 migrating counties.

Job Name	Interface	Module Name
PIXXC401	IFDS	org.civ.interfaces.financials.ifd.IFD440Reader
PIXXC402	IFDS-M	org.civ.interfaces.financials.ifd.IFDInboundReader
PIXXC400	PVS	org.civ.interfaces.financials.ievsrecipient.IEVSPVS040Reader
PIXXC500	NHR	org.civ.interfaces.financials.ievsrecipient.IEVSNHR350Reader

Table 2.1.1 C-IV Reader Jobs

Job Name	Interface	Module Name
PIXXC406	IFDS	org.civ.interfaces.financials.ifd.IFD440InboundReader
PIXXC408	IFDS-M	org.civ.interfaces.financials.ifd.IFD440MInboundReader
PIXXC404	PVS	org.civ.interfaces.financials.ievsrecipient.PVS040InboundReader
PIXXC505	NHR	org.civ.interfaces.financials.ievsrecipient.NHR350InboundReader

Table 2.1.2 LRS/CalSAWS Reader Jobs

Job Name	Interface	Module Name
PIXXC407	IFDS and IFDS Medical	org.civ.interfaces.financials.ifd.IFD440Validator
PIXXC405	PVS	org.civ.interfaces.financials.ievsrecipient.PVS040Validator
PIXXC506	NHR	org.civ.interfaces.financials.ievsrecipient.NHR350Validator

Table 2.1.3 LRS/CalSAWS Validator Jobs

2.1.3 Execution Frequency

No change from LRS/CalSAWS scheduling.

2.1.4 Key Scheduling Dependencies

No change.

2.1.5 Counties Impacted

57 Migration Counties (All counties except Los Angeles County)

2.1.6 Data Volume/Performance

Unknown.

2.1.7 Failure Procedure/Operational Instructions

No change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1395	The CONTRACTOR shall add the ability to assign out individual review types to Cases, Single Position, Random or No Assignment. This functionality shall be similar to the existing logic on the C-IV IEVS Batch Assignment Configuration Page.		Update the reader and validator jobs for NHR, PVS and IFDS abstracts in LRS/CalSAWS to read and process inbound files from the 57 Migration Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201516 | DDID 1967 DDCR 5507

Update Non-Payment of Premium file handling

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Amy Gill

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7/13/2020	1.0	Initial Draft	Avi Bandaranayake
9/21/20	1.1	Updated ToC and renamed section 4.1	Avi Bandaranayake

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1 OVERVIEW

This DDID/DDCR will cover changes to the Non-Payment of Premium (NPP) file that is sent to the system by an external partner, Maximus.

1.1 Current Design

Maximus sends a monthly file to the LRS File Transfer Protocol (FTP) server in an encrypted format. The NPP interface will retrieve the file from the FTP server, place the file in Amazon Secure Cloud Storage (S3) and decrypt it for designated Los Angeles County staff to access.

Neither system (LRS or C-IV) currently performs any automated processing on the received file, but in LRS the designated Los Angeles County staff may perform manual action on the file before sending it to additional Los Angeles County Medi-Cal Program staff for further action on the cases recorded on the file.

1.2 Requests

Create a new page to allow Users to download the NPP file from CalSAWS.

1.3 Overview of Recommendations

1. Create a new page in LRS/CalSAWS with the ability to download NPP files.
2. Modify interface jobs to work for all counties.

1.4 Assumptions

1. Maximus currently sends the NPP file to LRS/CalSAWS with only Los Angeles County data. As part of Partner Interface Testing for the Migration Counties, Maximus will update the file to provide a single file which will contain information for all counties.
2. NPP files for the 57 Migration Counties received prior to Migration will not be available for display or download in LRS/CalSAWS.

2 RECOMMENDATIONS

2.1 NPP File List

2.1.1 Overview

A new page will be added to allow the user to search for and download NPP files received from Maximus.

2.1.2 NPP File List Mockup

The mockup shows a web application interface for 'LKS Los Angeles AT1'. The top navigation bar includes several menu items: Case Info, Eligibility, Emp. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'NPP File List' and contains a search section with the following fields and buttons:

- File Name:**
- Begin Date:**
- End Date:**

Below the search section is a 'Search Results Summary' table with the following data:

File Name	Date	
AERC4.09012020	09/2020	<input type="button" value="Download"/>
AERC4.08012020	08/2020	<input type="button" value="Download"/>

Figure 2.1.1 – NPP File List


Special Units	Reports
SSIAP Workload Inventory	
	
SSIAP	
NPP File List	

Figure 2.1.2 – Local Nav List

2.1.3 Description of Changes

1. Create a new “NPP File List” page.
 - a. This page will be protected by the new NPPFileListView security right.
2. Add an expandable search section “Refine Your Search” using the existing search framework
 - a. Add a ‘File Name:’ label and text input field.
 - i. Allow users to enter up to 80 characters
 - ii. On searching, limit returned results to records that include the provided string, case insensitive (without regard to capitalization)
 - b. Add Begin Date and End Date Search Range
 - i. These will be the Batch Dates when the file was processed
 1. If End Date is entered first:
 - a. Maximum Begin Date available for selection must be six months prior to End Date
 - b. Begin Date is unselected, display data from six months prior to End Date
 2. If Begin Date is entered first:
 - a. Maximum End Date available for selection must be six months from the Begin Date
 - b. End Date is unselected, display date up to six months from the Begin Date

3. Date selections can only be made until System Date
3. Add a 'Search' button at the top and bottom of the expandable section
4. Add the 'Results per Page:' label and dropdown
5. Add a Results panel.
 - a. Hide this panel until/unless results are returned.
 - b. Add a Results Pagination panel header showing the number of results shown and the total number of results
 - c. Add Results Pagination Navigation links (hidden unless multiple pages are needed).
6. Add a Results table inside the Results panel.
 - a. Add a 'File Name' sortable column
 - i. This column will display the files names from the database.
 - b. Add a 'Date' sortable column
 - i. This column will have the dates from the database
 - c. Add a column with a blank header (non-sortable)
 - i. This column will hold the 'Download' button for each record.
 - ii. The Download button will download the associated file using the default browser download options.

2.1.4 Page Location

- **Global: Special Units**
- **Local: NPP File List**
- **Task: NPP File List**

Under the Special Units Global navigation add a new Local navigation link "NPP File List" that will open the NPP File List page with default search results displayed.

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
NPPFileListView	Gives the user the ability to view the NPP File List Page	NPP File List View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
NPP File List View	Gives the user the ability to view the NPP File List Page	View Only, System Administrator

2.1.6 Page Mapping

Add page mapping for each field on the new NPP File List page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 NPP File processing

2.2.1 Overview

The existing FTP job, PI19C150, moves the NPP inbound file to S3. The existing County 19 job, PI19C151, will decrypt the file.

Update the 'C151' job to make the file available to the online page and populate the database with the name of the file and the date it was processed.

2.2.2 Description of Change

1. Update the PI19C150 and PI19C151 job to be "00" jobs.
2. Create a BPCR to update the batch properties to allow the jobs to run for all 58 counties.
3. Update the PIXXC151 job to decrypt and make the NPP files from S3 available to display and download from the new NPP File List page.
4. Create a DCR to populate data files for the prior 6 months for Los Angeles County only. This will be a one-time activity and will include 6 files.

2.2.3 Execution Frequency

Monthly

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

All Counties

2.2.6 Data Volume/Performance

Unknown

2.2.7 Failure Procedure/Operational Instructions

No change

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security Matrix	Security Matrix for new pages added to the system.	SCR 201516 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

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

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 1967 CA-206874

Add Discrepancy Type to Investigation Result
Detail page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	Amy Gill

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08/28/2020	1.0	Original	Connor O'Donnell

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1 OVERVIEW

This SCR covers changes wherein a dropdown field "Discrepancy Type" will be added to the Investigation Result Detail page. When in Edit mode an entry can be selected from the "Discrepancy Type" dropdown. When the Investigation Result Detail page is in View mode an entry selected from the dropdown will be displayed.

1.1 Current Design

The Investigation Result Detail page is an SIU page that is used to track the results of investigations. It includes an Investigation Result Code multi-select field, the contents of which directly feeds Section III of the DPA 266 State Fraud Investigation Activity Report.

1.2 Requests

To close the gap with the C-IV system the field "Discrepancy Type" needs to be added to the Investigation Result Detail page. In "View" mode the field will display. In "Edit Mode" the contents of the field are selectable from a dropdown.

1.3 Overview of Recommendations

1. Add a Discrepancy Type dropdown to the Investigation Result Detail Page.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Investigation Result Detail Page

2.1.1 Overview

The Investigation Result Detail page provides information surrounding a particular investigation. The discrepancy type is used for tracking the discrepancy in the investigation.

2.1.2 Investigation Result Detail Mockup

Investigation Result Detail

*- Indicates required fields

Edit

Close

Case Information

Case Number:
U21D895

Case Name:
Case Name

Investigation ID:
F900000250

Investigation Results: *
Allegation Unfounded

Case Action:
No Adverse Action Taken

Discrepancy Type:
Income

Result Decision Date:
08/19/20

Programs

Figure 2.1.1 – Investigation Result Detail – View Mode

Investigation Result Detail

*- Indicates required fields

Save

Cancel

Case Information

Case Number:
U21D895

Case Name:
Case Name

Investigation ID:
F900000250

Investigation Results: *
Allegation Unfounded

Case Action:
No Adverse Action Taken

Discrepancy Type:

Result Decision Date:

Programs

Figure 2.1.2 – Investigation Result Detail – Edit Mode

2.1.3 Description of Changes

1. **Discrepancy Type (View Mode)** – Add a non-mandatory field to display the type of discrepancy that was selected.

2. **Discrepancy Type (Edit Mode)** – Add a non-mandatory dropdown field containing the following options ordered as specified below to enable the ability to select the type of discrepancy.
 - a. Blank – Null value for the purpose of clearing dropdown if necessary.
 - b. EBT Trafficking
 - c. Fleeing Felon
 - d. Household Comp
 - e. Income
 - f. In-custody
 - g. Whereabouts Unknown
 - h. No Discrepancy

2.1.4 Page Location

- **Global: Special Units**
- **Local: Special Investigations**
- **Task: Investigation Result**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

PMCR to display new field.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<ul style="list-style-type: none"> Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS 	<p>Added Discrepancy Type to the Investigation Result Detail page.</p>

		DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207106 | DDID 2305, 2306, 2307

Update Text Messaging Solution for all 58
Counties

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7/24/20	1.0	Initial Draft	Avi Bandaranayake
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9/21/20	1.2	Updates based on QA comments	Avi Bandaranayake
9/28/2020	1.3	Updates based on DEL comments	Avi Bandaranayake

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1 OVERVIEW

This design details migrating the existing C-IV texting solution to CalSAWS.

1.1 Current Design

In LRS/CalSAWS, all text message campaigns are currently run via batch jobs. These jobs will identify customers based on various criteria, and send text messages about status, benefit information, appointments, and other notifications. The text messages are sent from the Los Angeles County Information Technology Division (ITD) and not directly from the LRS/CalSAWS.

1.2 Requests

Migrate the C-IV text messaging solution into LRS/CalSAWS for all 58 Counties.

1.3 Overview of Recommendations

1. Add new text message sign up and cancellation flows.
2. Add text message campaigns that utilize a key word (OPT IN, STOP, HELP, etc.)
3. Add the ability for each County to turn campaigns on or off.
4. Add new text message campaigns to support all 58 counties.

1.4 Assumptions

1. Automated Actions framework will be in place to support turning text messages on and off. See CA-214928 for more details.
2. A new short code number will be used for all messages sent from CalSAWS as of the 21.01 release.
3. CA-218535 will add updates to CalSAWS.org to host a new informational Text Terms & Conditions page for Texting.
4. CA-207643 will add a new texting service that will be used by the CalSAWS system.
5. Text messages will only be sent in English and Spanish, using English characters. Not all phones may support Spanish or other language characters and using them may result in texts with illegible characters.
6. CA-216118 will migrate the TEXT 100 and TEXT 101 forms to CalSAWS.
7. Text messages related to Self-Service Portal will be implemented with CA-219232.
8. Updated Terms and Conditions text message will be sent with each Conversion wave: CA-220307, CA-220308, CA-220310, CA-220311, CA-220312, CA-220313 and CA-220314

2 RECOMMENDATIONS

2.1 Contact Detail

2.1.1 Overview

The Contact Detail page allows users to enter customer phone number information. This page will be used to store whether a customer wants to receive text messages, along with the status of text message sign up flow.

2.1.2 Contact Detail Mockup

Contact Detail

*- Indicates required fields Edit Close

Name: *
Test, Test 20M

E-mail Address: **E-Notification:**

E-mail Status: **Customer ID:**
4012887592

Phone Numbers					
Number	Type	IVR Consent	Text Message	Text Message Status	
(916)851-3000	ext.	Home	Opt-Out	Opt-In	Pending Verification

Resend Verification Edit Close

This [Type 1](#) page took 0.89 seconds to load.

Figure 2.1.1 – Contact Detail (view mode)

Contact Detail

*- Indicates required fields

Save Save and Return Cancel

Name: *
Test, Test 20M

E-mail Address:
 Allow E-Mail Reminder

E-mail Status:

IVR PIN:
Reset PIN

E-Notification:

Customer ID:
4012887592

Phone Numbers

Number	Type *	IVR Consent	Text Message	Text Message Status
<input type="checkbox"/> (916)851-3000 ext. <input type="text"/>	Home	Opt-Out	<input type="text"/>	
<input type="checkbox"/> <input type="text"/> ext. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Remove Add

Remove All Save Save and Return Cancel

This [Type 1](#) page took 2.04 seconds to load.

Figure 2.1.2 – Contact Detail (edit mode)

2.1.3 Description of Changes

1. Change the “Allow Text” column header in the Phone Numbers section to display “Text Message”.
2. Replace the check box with a dropdown.
 - a. Add the following options to the dropdown in order:
 - i. Blank (default)
 - ii. Opt-In
 - iii. Opt-Out
3. Add a new column titled “Text Message Status”.
 - a. Blank (default) – Customer has not given consent to receive text messages.
 - b. Pending Verification – Verification text has been sent and is awaiting customer response.
 - c. Verified – Customer has verified the phone number.
 - d. Undeliverable – Text could not be delivered to customer's phone number.
 - e. Opted-Out – Customer has previously chosen NOT to receive text messages.
4. When saving the page, if the Opt-In option is selected for “Text Message”, send the verification text to the phone number listed. This is used to verify the phone number of the customer.

- a. An automated text message will only be sent if the value of the Text Message option was changed to Opt-In and the page is saved.
 - b. Update the Text Message Status to "Pending Verification".
5. Create an internal system status flag to track the first time the customer opts-in for text notifications and the status is pending verification. Use this flag to prevent additional verification messages from being sent whenever the Contact Detail page is saved.
6. Validation will display if 'Opt-in' has been selected for the 'Text Message' option for multiple Phone Numbers on the same record.
 - a. Validation message to be displayed: Text Messaging is only applicable for one Phone Number.
7. Validation will display if 'Opt-in' has been selected for the 'Text Message' option for the same number on a different person record.
 - a. Validation message to be displayed: Text Messaging is only applicable for one Phone Number per Person.
8. Add a button "Resend Verification" that will display if the 'Text Message' option is 'Opt-in' and the 'Text Message Status' is Pending Verification in 'View Mode'.
9. Clicking the 'Resend Verification' button will temporarily change the button to a gray button stating, 'Verification Sent', which will prevent the user from clicking the 'Resend Verification' button again while on the same page. The Text Message Status field will be updated to 'Pending Verification' and a confirmation text message will be sent to the customer's phone number to verify their phone number. Once the page is refreshed, the 'Verification Sent' button will be replaced by 'Resend Verification' if the User goes back to the page in View mode.
10. Once a Phone Number has a Text Message Status of 'Verified' the 'Number' field cannot be edited.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Contact**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

PMCR for new field added.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Customer Contact History

2.2.1 Overview

This page is updated with a history of all text messages that are sent to or received from the users. There are no online changes to the existing page.

2.2.2 Mockup

N/A – no page changes

2.2.3 Description of Changes

1. Any time a text message is sent or received, a new Customer Contact History record will be created and displayed on the existing Customer Contact History page with the following values:
 - a. Date/Time – Date and Time that text message is sent
 - b. Name – Name of person that text message was sent to or from
 - c. Type – Text
 - d. Reason (see Contact History Reason column in the Supporting Document).

2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Customer Contact History**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update PMCR to reflect the changes made to Type and Reason.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Automated Action List

2.3.1 Overview

Add a new Automated Action type of Text Outreach to the Automated Action List page.

2.3.2 Automated Action List Mockup

Automated Action List

▼ Refine Your Search

Search

Name: <input type="text"/>	Status: <input type="text"/>	
Program: <input type="text"/>	Type: Text Outreach	Source: <input type="text"/>

Results per Page: 25 Search

Search Results Summary					Results 1 - 14 of 14
Name	Program (s)	Type	Source	Status	
Appointment Reminder	All Programs	Text Outreach	Batch	Active	Edit
Benefits restore/Balderas	All Programs	Text Outreach	Batch	Active	Edit
Form incomplete	All Programs	Text Outreach	Batch	Active	Edit

Figure 2.2.1 – Automated Action List

2.3.3 Description of Changes

1. Update the Automated Action List page to include the new Type of Text Outreach.
 - a. Update page query to return results of Type "Text Outreach"
 - b. Display Text Outreach type records on the Automated Action List page.

2.3.4 Page Location

- **Global: Tools**
- **Local: Admin**
- **Task: Automated Actions**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update PMCR to reflect the changes made to the Automated Action data model and static codes.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Automated Action Detail

2.4.1 Overview

Update the Automated Action Detail page to support the new Type of Text Outreach and add the Text Information section.

2.4.2 Automated Action Detail Mockup

Automated Action Detail

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

Action Information

Name: Appointment Reminder	Type: Text Outreach	Status: * Active
Program(s): All Programs	Run Date: Daily(Mon-Fri)	Source: Batch
Scenario: An appointment was scheduled.		

Text Information

Message Text:
You have an appointment {by phone OR in person} on {Date} at {Time}.

Questions? {Phone Number}

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

Figure 2.3.1 – Automated Action Detail (View Mode)

Automated Action Detail

Action Information

Name: Appointment Reminder	Type: Text Outreach	Status: * Active <input type="button" value="v"/>
Program(s): All Programs	Run Date: Daily(Mon-Fri)	Source: Batch
Scenario: An appointment was scheduled.		

Text Information

Message Text:
You have an appointment {by phone OR in person} on {Date} at {Time}.

Questions? {Phone Number}

This Type_1 page took 1.32 seconds to load.

Figure 2.3.2 – Automated Action Detail (Edit Mode)

Action Information

Name: Form Processed	Type: Text Outreach	Status: * Active <input type="button" value="v"/>
Program(s): CW,CF	Run Date: Daily(Mon-Fri)	Source: Batch
Scenario: The status of a SAR7, CF RE, or CW/CF RE Packet has been updated to Complete.		

Text Information

Message Text:
We processed your <FormType>. As of <mm/dd/yyyy> your <Program> benefit amt is \$<Benefit Amount> for <Benefit Month mm/yyyy>.
Questions? <Phone Number>

Include Benefit Information:

Note:
If benefit information is not available or not included, the message will appear as follows:

We processed your <FormType>.

Questions? <Phone Number>

Figure 2.3.3 – Automated Action Detail with Optional Benefit dropdown

2.4.3 Description of Changes

1. Add a new Automated Action for each text message listed in the Supporting Document.
 - a. The Type field will be "Text Outreach".
 - b. Update the existing Action Information section in the Automated Action Detail page with details for each text message listed.
 - c. Status can be updated in Edit Mode. Selection options are:
 - i. Active – text will be sent.
 - ii. Inactive – no text will be sent.
2. Status will be defaulted to Inactive for all counties except LA.
3. Add a new "Text Information" section to the Automated Action Detail page for actions of type "Text Outreach" with the following fields:
 - a. Message Text – The contents of the message to be generated by the Automated Action.
4. For the message "Form Processed with Details" from the Supporting Document:
 - a. Include Benefit Information dropdown – Whether the generated text message will include benefit information for this Automated Action. The benefit calculation sweep job will reference this field to determine if the benefit amount will be included in the text message.
 - i. This field only displays for the "Form Processed with Details" message.
 - ii. Selection options are:
 1. Yes – benefit information is included if available.
 2. No – benefit information is not included.
 - b. Add the following Text:
 - i. **Note:**
If benefit information is not available or not included the message will appear as follows:
{Display the "Form Processed" message from the Supporting Document.}

2.4.4 Page Location

- **Global: Tools**
- **Local: Admin**
- **Task: Automated Actions**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update PMCR to reflect the changes made to the Automated Action data model and static codes.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Updates to existing Los Angeles County Text Messaging Jobs

2.5.1 Overview

Los Angeles County text messaging jobs that reference the Los Angeles County public customer portal, Your Benefits Now (YBN), will continue to run using the existing texting model and will be sent from ITD.

All other text messaging jobs that use the existing texting model will be turned off and will no longer run.

2.5.2 Description of Change

1. The jobs listed in Table 2.5.1 will continue to run for Los Angeles County only. These jobs will continue to send text messages to Los Angeles County customers in English only.
2. Update the jobs to send messages to customers that have Opted-in and are Verified in the system as indicated on the updated Contact Detail page.
3. Add Contact History Records with the contact history reason listed.
4. Turn off the jobs listed in Table 2.5.2.

CAMPAIGN NUMBER	CAMPAIGN NAME	JOB NUMBER	MESSAGE TEXT	CONTACT HISTORY REASON
251	Paperless – Text	PO19C1179	View your DPSS mail at dpss.lacounty.gov and click YBN. To get U.S. mail instead update your account online or call 866-613-3777.	Paperless – Text
252	GR/GROW Paperless Text	PO19C1196	View your DPSS mail at dpss.lacounty.gov and click YBN. To get U.S. mail instead update your account online or call 866-613-3777.	GR/GROW Paperless Text
258	Upload Verification - Text	PO19C1182	DPSS received the form(s) you submitted. For more info log in to dpss.lacounty.gov and click the YBN button.	Upload Verification - Text

CAMPAIGN NUMBER	CAMPAIGN NAME	JOB NUMBER	MESSAGE TEXT	CONTACT HISTORY REASON
260	GROW Paperless - Text	PO19C1183	View your DPSS mail at dpss.lacounty.gov and click YBN. To get U.S. mail instead update your account online or call 866-613-3777.	GROW Paperless - Text
261	GEAR Paperless – Text	PO19C1184	View your DPSS mail at dpss.lacounty.gov and click YBN. To get U.S. mail instead update your account online or call 866-613-3777.	GEAR Paperless – Text
271	General Relief Needs Special Assistance Expiration Text Reminder	PO19C1169	You have an important notice from DPSS. Please log in to your YBN account or call us at (866)613-3777 for detailed information.	General Relief Needs Special Assistance Expiration Text Reminder

Table 2.5.1 Texting jobs that will continue to run

CAMPAIGN NUMBER	CAMPAIGN NAME	JOB NUMBER
220	SAR7 Received (Confirm Receipt) – Text	PO19C1302
226	SAR7 Incomplete – Text	PO19C1303
237	SAR7 Sent/Reminder – Text	PO19C1301
238	SAR7 Rescind/Restoration – Text	PO19C1304
239	SAR Processed – Text	PO19C1305
250	GROW Appointment – Text	PO19C1178
255	GR Non Compliance Text	PO19C1185
256	GROW Non Compliance Text	PO19C1186
257	QR7-LA Not Received - Text	PO19C1181
259	SAR7 Not Received Text	PO19C1180
270	QR7 Due Month Text	PO19C1187

Table 2.5.2 Texting jobs that will be turned off

2.5.3 Execution Frequency

No Change

2.5.4 Key Scheduling Dependencies

No Change

2.5.5 Counties Impacted

Los Angeles County

2.5.6 Data Volume/Performance

Unknown

2.5.7 Failure Procedure/Operational Instructions

No Change

2.6 Real-Time Text Messages

2.6.1 Overview

Update the system to send real-time text messages and respond to keywords from the customer as described in the Supporting Document.

2.6.2 Description of Change

1. Messages are sent real-time or immediately, during business hours (Monday – Friday, 8:00 AM – 6:00 PM), based on changes to data in the system. See the Supporting Document for specific messages and trigger conditions.
2. Text messages will be sent for a County, only if they have an Active status as indicated on the Automated Actions page.
3. Text messages will be sent in Spanish if the person's Written Language preference is 'Spanish', otherwise send the text message in English for all other written languages.
4. All text messages, except the "Opt-in" message, are sent to customers that have Opted-in to text messaging and have a Text Message Status of 'Verified'.
5. Text messages will not be sent for Domestic Violence cases, indicated by either of the following:
 - a. Active Domestic Violence Case Flag
 - b. Confidential Case type of Domestic Violence
6. For text messages that have a <Phone Number> parameter in the message, use the number below based on the County of the customer's case:
 - a. Use (866) 613-3777 if the customer is in Los Angeles County.
 - b. Use (844) 859-2100 for all other counties.
7. Real-time messages include responses to select keywords (not case sensitive) received from the customer.
 - a. When a customer responds to the Opt-in message with a 'Y' (or 'S' for Spanish) the system will send the confirmation message,

- update the Text Message Status to 'Verified' and add a Customer Contact History record.
- b. At any time if a customer sends a cancellation keyword (STOP, STOP ALL, END, QUIT, CANCEL, UNSUBSCRIBE, or the corresponding Spanish keywords) the system will update the Text Status to 'Opted-Out', the Text Message to 'Opt-Out' and add a Customer Contact History record.
 - c. When a customer no longer wishes to receive text messages the User can update the Text Message dropdown to 'Opt-Out'. The Text Message Status will update to 'Opted-Out' when the record is saved.
8. Create a journal entry anytime the Text Message Status field changes. See Table 2.6.1.
 9. When a customer sends a text with keyword 'CALTEXT' or 'CALTEXTO':
 - a. Check if the number the message was sent from is already in the system and opted-in to text messaging.
 - i. If the number the message was sent from is not opted-in to text messaging and the keyword is 'CALTEXT':
 1. Respond with the "Response to CALTEXT" message.
 2. Set the Text Message field to 'Opt-in'.
 3. Set Text Message Status to 'Verified'.
 - ii. If the number the message was sent from is not opted-in to text messaging and the keyword is 'CALTEXTO':
 1. Respond with the "Response to CALTEXTO (Spanish)" message.
 2. Set the Text Message field to 'Opt-in'.
 3. Set the Text Message Status to 'Verified'.
 - iii. If the number the message was sent from does not exist in CalSAWS respond with the "Phone Number Validation Error" message.
 - iv. If the number the message was sent from is associated to more than one person in the system, respond with the "Phone Number Validation Error" message.
 - v. If the number is already opted-in to text messaging, respond with the "Phone Number Validation Error" message.

Journal info	Description
New/Update	New
Category ID	TBD by Developer
CODE_NUM_IDENTIF	TBD by Developer
Short Decode Name	Customer <First Name> <Last Name> Text Notification Changed.
Long Decode Name	Contact Detail Text Notification was updated to: <NewValue>.

Journal info	Description
	Phone Number updated to: <Phone Number>. Current Text Message Status: <Text Messaged Status>. Name: Customer <First Name> <Last Name>

Table 2.6.1 - Journal Details

2.6.3 Execution Frequency

Real-Time (During Business Hours)

2.6.4 Key Scheduling Dependencies

N/A

2.6.5 Counties Impacted

All Counties

2.6.6 Data Volume/Performance

Unknown

2.6.7 Failure Procedure/Operational Instructions

N/A

2.7 Batch Text Messages

2.7.1 Overview

Update the system to send new batch text messages based on criteria described in the Supporting Document.

2.7.2 Description of Change

1. Create batch sweeps to gather the target population to send text messages to. This will be based on the criteria described in the Supporting Document for each Batch text message.
2. Create batch jobs to send messages as described in the Supporting Document.
NOTE: Certain jobs may need to be split into multiple thread jobs depending on the size of the target population.
3. Text messages will be sent for a County only if they have an Active status as indicated on the Automated Actions Page.

4. Text messages will be sent in Spanish if the person's Written Language preference is 'Spanish', otherwise send the text message in English for all other written languages.
5. All text messages, except the "Opt-in" message, are sent to customers that have Opted-in to text messaging and have a Text Message Status of 'Verified'.
6. For text messages that apply to All Programs, only one text will be sent per recipient if they are on multiple programs, unless otherwise specified.
For example, for the 'Verifications Request Sent' text message, only one message will be sent to the customer, regardless of the number of Active programs the person is on.
7. For text messages that have a <Phone Number> parameter in the message, use the number below based on the County of the customer's case:
 - a. Use (866) 613-3777 if the customer is in Los Angeles County.
 - b. Use (844) 859-2100 for all other counties.
8. Text messages will not be sent for Domestic Violence cases, indicated by either of the following:
 - a. Active Domestic Violence Case Flag
 - b. Confidential Case type of Domestic Violence
9. All batch text messages will be sent during normal business hours (8:00 AM to 6:00 PM).

2.7.3 Execution Frequency

See Supporting Document.

2.7.4 Key Scheduling Dependencies

N/A

2.7.5 Counties Impacted

All Counties

2.7.6 Data Volume/Performance

Unknown

2.7.7 Failure Procedure/Operational Instructions

N/A

2.8 Adhoc Terms & Conditions Text Message

2.8.1 Overview

Create a batch job for the “Updated Terms and Conditions” text message on the Supporting Document to inform customers of changes to the Text Messaging Terms and Conditions. This message can be re-used whenever the terms and conditions are updated or changed.

2.8.2 Description of Change

1. Create batch sweeps to gather the target population to send text messages to. The target population: All Active customers who have previously opted in to text messaging.
2. Create a batch job to send a one-time text message to the target population.
3. Create a BSCR to run the job once, the day following the 21.01 release.
4. Text messages will be sent in Spanish if the person's Written Language preference is 'Spanish', otherwise send the text message in English for all other written languages.
5. Only one text will be sent per recipient if they are on multiple programs, unless otherwise specified.
6. Text messages will not be sent for Domestic Violence cases, indicated by either of the following:
 - i. Active Domestic Violence Case Flag
 - ii. Confidential Case type of Domestic Violence
7. This messages will be sent during normal business hours (8:00 AM to 6:00 PM).

2.8.3 Execution Frequency

Once

2.8.4 Key Scheduling Dependencies

N/A

2.8.5 Counties Impacted

LA County

2.8.6 Data Volume/Performance

Unknown

2.8.7 Failure Procedure/Operational Instructions

No Change

2.9 Data Change

2.9.1 Overview

Existing LRS records that use the 'Allow Text' checkbox will be updated to use the new Text Message and Text Message Status fields on the Contact Detail page.

2.9.2 Description of Change

1. Update all Contact Detail records that are currently set to "Allow Text" to "Opt-in" for the Text Message field and "Verified" for the Text Message Status field.

2.9.3 Estimated Number of Records Impacted/Performance

Approximately 400,000

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch	List of CalSAWS text messages.	CA-207106 Text Message Details.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2305	The CONTRACTOR shall update the SMS notification system to apply current SMS functionality to all the 58 Counties.		
2306	The CONTRACTOR shall review the nightly batch jobs of text messages sent by LRS, C-IV, and CalWIN core systems and consolidate them into one set of nightly SMS batch jobs.	<p>Original:</p> <ul style="list-style-type: none"> - All current C-IV texting sweeps(15), balancer(1), and generation(4) jobs will be ported. - No more than 15 new sweeps will be added for LRS. - No more than 15 new sweeps will be added for CalWIN. <p>Revised:</p>	
2307	<p>Original:</p> <p>The CONTRACTOR shall configure the notifications system to interface with the OpenMarket API to send SMS messages.</p> <p>Revised:</p> <p>The CONTRACTOR shall configure the notifications system to interface with Amazon Pinpoint to send SMS messages.</p>		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207113 | DDID 2279

Update Text Message functionality to allow
Emergency Text Messages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/02/2020	1.0	Original	Melissa Mendoza
09/11/2020	1.1	Updated document per QA Comments.	Melissa Mendoza
09/30/2020	1.2	Updates per Deliverable Comments.	Melissa Mendoza
10/6/2020	1.3	Updates per Deliverable Comments	Amy Gill

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1 OVERVIEW

The purpose of this SCR is to allow each county to send out a one-time text message to alert their customers who are currently opted-in to text messaging of an emergency occurring in their county. The one-time text message will be sent to a specific group of individuals based on program as well as allow for Zip Code parameters.

1.1 Current Design

Text message campaigns are system wide and counties can opt-in to the campaigns that are sent out to their customers. There is currently no process for sending out an emergency or critical text messages to customers that can be customized by the county.

1.2 Requests

Per DDID 2279, enable the functionality to select the group of customers to send text messages based on specified characteristics in an emergency.

1.3 Overview of Recommendations

1. Create a new Administrative page called Emergency Text which will allow a one-time emergency text message to be sent to customers opted-in to text messaging.

1.4 Assumptions

1. The group of customers will be chosen by program.
2. Text Messages will only be sent to individuals who are opted-in due to federal policy.
3. The text message sent out would be a one-time message and not a campaign. Emergency text messages will not display on the Customer Contact History page as the messages are emergency in nature and typically not related to the individual's case.
4. The County is responsible for their own translations.
5. Not all phones may support Spanish characters and using them may result in texts with illegible characters.
6. Current texting character limitations for the entire text message for English characters including spaces is 160. Spanish characters count as more than one. User-entered character limit will be 150 characters, due to including "CalSAWS: " at the beginning of each message.
7. This DDID is dependent on the texting framework from CA-207106 DDID 2305, 2306, 2307 - Update Text Messaging Solution for all 58 Counties being in the LRS/CalSAWS System.

2 RECOMMENDATIONS

Create a new page called Emergency Text that will allow the county to send a one-time text message to customers that are opted-in to texting. The new page will allow the County to send the text message in English and Spanish to a selected group of individuals. There will be a limit of one emergency text message that can be sent by a county within a single month, with the ability for management override if a second emergency occurs within the same month.



2.1 Emergency Text List

2.1.1 Overview

The Emergency Text List page will display the text messages that have been created. The records will display with the sort order defaulted to the Status Date. From this page the User with proper security rights will be able to Add and Remove Emergency Text records.

2.1.2 Emergency Text List Mockup

Emergency Text List

Display From:  To:  [View](#)

Search Results Summary **Results 1 - 2 of 2**

[Add](#)

<input type="checkbox"/>	Text Name	Program	Status	Status Date	
<input type="checkbox"/>	Emergency Text	All	New	08/12/2020	Edit
	Important Notification	CalWORKs, CalFresh, Medi-Cal	Processed	07/01/2020	

[Remove](#) [Add](#)

This Type_1 page took 0.96 seconds to load.

Figure 2.1.1 – Emergency Text List Mockup

Admin
Flag
County Announcement
County Authorizations
County Security Roles
Audit
Oversight Agency Staff
Correspondence
Campaign
Emergency Text

Figure 2.1.2 – Emergency Text Task Navigation

2.1.3 Description of Changes

1. The new page will be navigated to from the Global Navigation Admin Tools, Local Navigation Admin and a new Task Navigation Item called Emergency Text which will display below Campaign.
2. Emergency Text List page will display the emergency text messages that have been processed as well as allow new text messages to be created and removed.
 - a. The list page will be paginated.
3. Field Descriptions and Requirements:

Field/Button Name	Field/Button Description	Requirements
Display From	From Status Date	From Status Date
Display To	To Status Date	To Status Date
View Button	View records between selected dates.	View records between dates in From and To fields.
Text Name	Text Name from Emergency Text Detail.	Hyperlink navigates to the Emergency Text Detail page in View Mode.

Field/Button Name	Field/Button Description	Requirements
Program	Program(s) selected from Emergency Text Detail.	Display Program selected from the previous page.
Status	Status is set by the User or Batch when processed.	Statuses are New, Ready to Send, Processed
Status Date	The date that the status is updated.	Status Date will display in descending order with the newest at the top. This is the default sort for the records.
Add Button	Add a new Emergency Text	Navigates to the Emergency Text Detail page in Create Mode.
Remove Button	Removes the record.	Checkbox next to record is only available for records with a status of New.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: Emergency Text**

2.1.5 Security Updates

1. Security Rights. Please see attached Security Matrix.

Security Right	Right Description	Right to Group Mapping
EmergencyTextEdit	Allows the creation and editing of Emergency Text Records.	Emergency Text Edit

Security Right	Right Description	Right to Group Mapping
EmergencyTextView	Allows the ability to view Emergency Text records.	Emergency Text View
EmergencyTextRemove	Displays remove button and allows the deletion of the Emergency Text record prior to being sent.	Emergency Text Remove

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Emergency Text Edit	Allows the creation and editing of Emergency Text Records.	System Administrator
Emergency Text View	Allows the ability to view Emergency Text records.	System Administrator, View Only
Emergency Text Remove	Displays remove button and allows the deletion of the Emergency Text record prior to being sent.	System Administrator

2.1.6 Page Mapping

PMCR for new page.

2.1.7 Page Usage/Data Volume Impacts

Expected low volume since text will only be limited to emergencies and is restricted to once a month.

2.2 Emergency Text Detail

2.2.1 Overview

This new Emergency Text Detail page will allow the County to send a one-time message to a group of customers based on program and Zip Code(s). The one time message will be for emergency information that needs to be urgently sent to the customers outside of the normal texting campaigns. The page will support both English and Spanish texts with a limit of 150 characters including links.

2.2.2 Emergency Text Detail Mockup

Emergency Text Detail

*- Indicates required fields

Next

Cancel

Create Emergency Text

Program: *	Zip Code:
<input type="text" value="- Select -"/> All AAP CAPI	<input type="text" value="95815;95816;95821"/>

Note: List Zip Codes separated by a semi-colon and without spaces. Example: 12345;54321;67890

Next

Cancel

Figure 2.2.1a– Emergency Text Detail Create Mockup

Emergency Text Detail

* - Indicates required fields

Save and Return

Cancel

Recipient Information

Program:	Zip Code:	Total Recipients:
All	95815;95816;95821	2,500

Text Message

Text Name: *

Status *

English Text Message: *

English Link:

Maximum characters allowed is 150 including link. Current character count is: 0

Spanish Text Message: *

Spanish Link:

Maximum characters allowed is 150 including link. Current character count is: 0

Save and Return

Cancel

Figure 2.2.1b– Emergency Text Detail Create Second Page Mockup

Emergency Text Detail

*- Indicates required fields

Save and Return

Cancel

Recipient Information

Program:

All

Zip Code:

95815;95816;95821

Total Recipients:

2,500

Text Message

Text Name: *

Emergency Text

Status *

New

English Text Message: *

This is an emergency text.

English Link:

<http://www.mycountysite.com/textinfo.htm>

Maximum characters allowed is 150 including link. Current character count is: 67

Spanish Text Message: *

Este es un texto de emergencia.

Spanish Link:

<http://www.mycountysite.com/textinfoespanol.htm>

Maximum characters allowed is 150 including link. Current character count is: 79

Save and Return

Cancel

Figure 2.2.1c– Emergency Text Detail Edit Mockup

Emergency Text Detail

*- Indicates required fields

Save and Return

Cancel

• An emergency text has already been sent for this month.

Override

Figure 2.2.1d– Emergency Text Detail Edit – Override Validation

Emergency Text Detail

*- Indicates required fields

Close

Recipient Information		
Program:	Zip Code:	Total Recipients:
All	95815;95816;95821	2,500

Text Message	
Text Name: *	Status *
Emergency Text	Processed
English Text Message: *	English Link:
This is an emergency text.	http://www.mycountysite.com/textinfo.htm
Maximum characters allowed is 150 including link. Current character count is: 67	
Spanish Text Message: *	Spanish Link:
Este es un texto de emergencia.	http://www.mycountysite.com/textinfoespanol.htm
Maximum characters allowed is 150 including link. Current character count is: 79	

Close

Figure 2.2.1e – Emergency Text Detail View Mockup

2.2.3 Description of Changes

1. Emergency Text Detail page will have an initial page for selecting the Program and Zip Codes. This initial page will let the User know how many recipients the text will be sent to.
 - a. The Program field is multi-select.
 - i. If the User selects 'All Programs' then the text will be sent to all individuals that are opted-in regardless of the program. The individual will need to be Active (including Ineligible) or Pending on a program in order to receive the text.
 - ii. The individuals on the program will have a status of Active or Pending on the system date that the batch is generated and processed.
 - b. Zip Code will allow multiple Zip Codes separated by semi-colons without spaces.
 - i. If no Zip Code is entered then the text will be sent to the entire county of opted-in Active or Pending individuals for the specified programs.
 - ii. The custom validation message for Zip Codes will check to see that only 5 numbers are used with no spaces and separated by semi-colons. If the requirements are not met, the following validation message will occur:

“Zip Code – List zip codes separated by a semi-colon with no spaces.”

Technical Note: The following validation messages currently exist in the system and will also be applied:

- ZIP Code - Domestic Zip Codes must be 5 characters in length.
- ZIP Code - Domestic Zip Codes can only contain numeric characters.

2. When clicking the Next button from the initial page the User will navigate to the Emergency Text Detail page including the number of recipients and the ability to Cancel and return to the previous page to update their selection.
 - a. A single text will be sent to each recipient regardless of them being on multiple programs and they will only be counted once.
3. Emergency Text can only be edited when the status is set to New. Once the User changes the Status to Ready to Send or is Processed via Batch they can no longer edit or remove the record.
4. Only one emergency text can be sent within a single calendar month period. If an additional text is set to a status of Ready to Send within the same calendar month the following validation message will appear with an Override button allowing the County Administrator with appropriate security rights to override the validation, when more than one emergency occurs within a one month period. In order to override the validation the County Administrator will need to have the Emergency Text Override security group.
 - a. Validation Message: “An emergency text has already been sent for this month. “
5. The English Text and Spanish Text message will have a remaining character count which will include the link if one is added. The character strings count will include spaces and Spanish characters which can count as more than a single character.
 - a. The text message sent will start with “CalSAWS: ” then be followed by the message entered by the User.
Note: A space will follow the colon after CalSAWS.
6. The English Link and Spanish Link fields will require no spaces and a (.) included. The following validation message will appear if the link does not meet those requirements:
 - a. “(Field Name) – Please enter a valid URL.”
 - b. If a link is entered a space will appear before the link in the text message and count towards the remaining Character count.
7. Field Descriptions and Requirements:

Field/Button Name	Field/Button Description	Requirements
Program	Multi-Select of all programs that are supported in the County.	Required Field. All will send to all opted-in recipients that are Active (including Ineligible) or Pending on a program.
Zip Code	Zip Code of Physical Address for individuals in the county who are opted-in to text messaging. No Zip Code will send to the entire county of those opted-in to text messaging.	Zip Code will allow for multiple zip codes without spaces and separated by semi-colon. Custom Validation message for Zip Code standards.
Recipients	Will display the number of recipients based on the Programs and Zip Codes selected.	If individuals are on multiple programs they will count as a single recipient.
Text Name	Text Name is only used to display on the Emergency Text List and Detail page, but is not part of the actual text. This should be a description of what the text is concerning.	Required field.
Status	Selection is New and Ready to Send in create and edit mode. The Status when creating a record is set to New. When the User is ready to send the message they will set the Status to Ready to Send. When the batch processes the text the Status is set to Processed. Processed is set by batch and not a	Required field.

Field/Button Name	Field/Button Description	Requirements
	selection that is available to the User.	
English Text Message	Text Message is limited to 150 Characters which includes the link. Spaces count as characters.	Required Field. Message will begin with "CalSAWS: " Do not allow for line breaks.
English Link	Link that will be included in the text message.	Link will be included in the Character Count. County is advised to use a shortened link to save on characters. A space will be entered between the end of the message and the link in the text message.
Spanish Text Message	Text Message is limited to 150 Characters which includes the link. Spaces count as characters. Spanish characters may take up additional characters if used. Note: Not all phones will be able to display Spanish characters and they may not be visible in the text message. If the County plans to send a text in only English this section must be completed in English as it is required.	Required field. Message will begin with "CalSAWS: " A Spanish keypad is available next to the field to enter Spanish characters.
Spanish Link	Link that will be included in the text message.	Link will be included in the Character Count. County is advised to use a shortened link to save on characters.

Field/Button Name	Field/Button Description	Requirements
		A space will be entered between the end of the message and the link in the text message.
Edit Button	Access the page in Edit Mode with a status of New.	The Edit button will no longer display after the Status has been set to Ready to Send or Processed.
Save and Return Button	Save the Record, available in Create/Edit Mode.	After Save and Return User navigates to the Emergency Text Detail page in View Mode.
Cancel Button	Cancel button navigates to the previous page with no changes made to the record.	Cancel button available in Edit/Create modes.
Close Button	Close button returns to the previous page.	Close button available in View Mode.
Override Button	Allows the County Administrator to override validation in an emergency situation when more than one emergency occurs within a one month period.	In order for button to display County Administrator will need to have the Emergency Text Override security group.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: Emergency Text**

2.2.5 Security Updates

1. Security Rights. Please see attached Security Matrix.

Security Right	Right Description	Right to Group Mapping
EmergencyTextEdit	Allows the creation and editing of Emergency Text Records.	Emergency Text Edit
EmergencyTextView	Allows the ability to view Emergency Text records.	Emergency Text View
EmergencyTextOverride	Allows the ability to override and send another text in the same month period after validation message.	Emergency Text Override

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Emergency Text Edit	Allows the creation and editing of Emergency Text Records.	System Administrator
Emergency Text View	Allows the ability to view Emergency Text records.	System Administrator, View Only
Emergency Text Override	Allows the ability to override and send another text in the same month period after validation message.	System Administrator

2.2.6 Page Mapping

PMCR for new page.

2.2.7 Page Usage/Data Volume Impacts

Expected low volume since text will only be limited to emergencies and is restricted to once a month.

2.3 Emergency Text Batch Sweep

2.3.1 Overview

This batch sweep will retrieve all the records with a Status of Ready to Send and update the Status to Processed once the job processes the records.

2.3.2 Description of Change

1. Create a Batch Sweep to gather all the customers based on the Emergency Text page with a status of Ready to Send.
 - a. All recipients must be Opted-In to text messaging.
 - b. Recipients are based on the options selected from the Program multi-select.
 - i. Active or Pending on a program.
 - ii. If All Programs is selected, recipients must be Active (Including Ineligible) or Pending on any program.
 - c. Only one text will be sent per recipient if they are on multiple programs.
 - d. If a Zip Code is included, it will filter recipients based on Physical Address Zip Code.
 - i. If no Zip Code is selected it will include all recipients within the County.
 - ii. If multiple Zip Codes are entered, select participants in each Zip Code within the County.
 - e. Use Written Language preference for the person to determine if the text is sent in English or Spanish.
 - i. Text messages will be sent in Spanish if the person's Written Language preference is 'Spanish', otherwise send the text message in English for all other written languages.

2.3.3 Execution Frequency

Daily

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

All Counties.

2.3.6 Data Volume/Performance

Unknown.

2.3.7 Failure Procedure/Operational Instructions

Standard failure procedure.

2.4 Emergency Text Batch Processing Job

2.4.1 Overview

This batch processing job will send the text to all participant identified by the Emergency Batch Text Sweep.

2.4.2 Description of Change

1. Create a Batch Job to send the text message to the recipients based on the Emergency Text Sweep.
 - a. Text Message sent will be either the English or Spanish message text entered based on the Written language preference of the recipient.
 - b. Include a link in the message if one has been entered.

2.4.3 Execution Frequency

Daily

2.4.4 Key Scheduling Dependencies

Emergency Text Sweep

2.4.5 Counties Impacted

All Counties.

2.4.6 Data Volume/Performance

Unknown.

2.4.7 Failure Procedure/Operational Instructions

Standard failure procedure.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security Matrix	Security Matrix for new pages added to the system.	Please see CA-207113 DDID 2279 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2279	<p>Original: The CONTRACTOR shall enable the functionality to select the group of customers to send text messages based on specified characteristics and specify whether the message is sent to all customers in an emergency situation per federal policy or only those that have opted-in for text messages.</p> <p>Revised: The CONTRACTOR shall enable the functionality to select the group of customers to send text messages based on specified characteristics in an emergency.</p>	<ol style="list-style-type: none"> 1. The group of customers will be chosen by Program. 2. Text Messages will only be sent to individuals who are opted-in due to federal policy. 	<p>Created a new page called Emergency Text which will allow the county to send a one-time text messages based on program and zip code to a group of recipients opted-in to text messaging.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207165 | DDID 2117

Updates to Manual EDBC for FC, AAP, KG

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/15/2020	1.0	Initial document	Yale Yee
9/28/2020	2.0	Updated Figure 2.3.1 based on Deliverable comments	Amy Gill
10/5/2020	3.0	Added details for ARC EDBC	Yale Yee

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1 OVERVIEW

Manual EDBC's are an alternate procedure that allow the user an option to determine benefits manually. For this DDID, Manual EDBC's for Foster Care (FC), Kin-GAP (KG), and Adoption Assistance Program (AAP) will be updated to address the changes made with DDID 2191 - Consolidation of Foster Care Payments (CA-207140).

1.1 Current Design

Manual EDBC's for FC, AAP, and KG do not include the changes made with DDID 2191.

1.2 Requests

Manual EDBC's for FC, AAP and KG will include the changes made with DDID 2191 to consolidate issuances and distinguish fiscal expenditures. The following expenditures will be addressed:

- Placement Rate
- Special Care Increment
- Infant Supplement Payment
- Infant Supplemental Rate Supplement
- Additional Payment
 - Kidstep Supplement
 - County Authorized Allowance
- Educational Travel Reimbursement

1.3 Overview of Recommendations

1. Update Manual EDBC functionality for FC, AAP, and KG with additional fields based on the changes made with DDID 2191 (CA-207140).

1.4 Assumptions

1. No updates will be required for the FC/AAP/KG Claiming processing of Issuances or Issuance adjustments authorized by Manual EDBC.
2. In LRS/CalSAWS, Approved Relative Caretaker (ARC) benefits are issued through an ARC aid code on a FC EDBC.
3. CA-219462 will address implementing the Aid Code Information and Authorized Amount Per Rate Structure sections for a KG EDBC.

2 RECOMMENDATIONS

Manual EDBC for FC, AAP, and KG are updated with additional fields based on the changes made with DDID 2191.

2.1 Foster Care EDBC (Manual)

2.1.1 Overview

The manual FC EDBC includes the changes made with DDID 2191 to consolidate issuances and distinguish fiscal expenditures.

2.1.2 Foster Care EDBC (Manual) Mockup

Aid Payment	
Rate Payment:	\$ 0.00
Special Care Increment:	+ 0.00
Infant Supplement Payment:	+ 0.00
Infant Supplemental Rate Supplement:	+ 0.00
Additional Rate:	+ 0.00
Educational Travel Reimbursement	+ 0.00
Unearned Income	- 0.00
Earned Income	- 0.00
Earned Income Disregard	+ 0.00
Potential Benefit:	\$ 0.00
Previous Potential Benefit:	\$ 0.00
Overpayment Adjustment Amount	\$ 0.00
Authorized Amount	\$ 0.00
Overpayment	\$ 0.00

County Authorized Allowance
Kidstep Supplement

Add

Calculate

Figure 2.1.1 – Foster Care EDBC (Manual) Aid Payment Section

Aid Payment	
Potential CalWorks Benefit:	\$ 0.00
Potential ARC Amount:	\$ 0.00
Rate Payment:	\$ 0.00
Special Care Increment:	+ 0.00
Infant Supplement Payment:	+ 0.00
Infant Supplemental Rate Supplement:	+ 0.00
Additional Rate:	+ 0.00 Add
Educational Travel Reimbursement	+ 0.00
Unearned Income	- 0.00
Earned Income	- 0.00
Earned Income Disregard	+ 0.00
Potential Benefit:	\$ 0.00
Previous Potential Benefit:	\$ 0.00
Overpayment Adjustment Amount	\$ 0.00
Authorized Amount	\$ 0.00
Overpayment	\$ 0.00

Calculate

Figure 2.2.1 – Foster Care EDBC (Manual) With ARC Aid Code

Authorized Amount Per Aid Code						
Aid Code	Auth Amount	Number of Days	Rate Structure	Placement Type	Pay Code	
5K	\$ <u>5,164.00</u>	31	Non-CCR	Nonrelative Extended Family Member Home	EC EA Ineligible Emergency Placement Prior to Home Approval	▼

Figure 2.3.1 – Foster Care EDBC (Manual) Authorized Amount Per Aid Code Section

2.1.3 Description of Changes

1. Add the following fields under the Aid Payment section of the Foster Care EDBC (Manual) page:
 - a. Rate Payment
 - b. Special Care Increment
 - c. Infant Supplement Payment
 - d. Infant Supplemental Rate Supplement
 - e. Additional Rate
 - i. Add a dropdown of Additional Rate Types:

1. The available options are the following:
 - a. Blank
 - b. County Authorized Allowance
 - c. Kidstep Supplement

Note: Infant Supplement related options will not be added to the dropdown.
2. The values in the dropdown are in alphabetical order.
- ii. Add a validation on the 'Add' button when clicked and a value is entered without a type selected. The validation states the following:
 1. "Add – Please select an Additional Rate Type"
- iii. The line item is added with a new Add button.
 1. The Add button creates a new line item with the Additional Rate Type, value inputted and a Remove button.
 - a. The Remove button removes the line item.
- iv. The user has the ability to add multiple Additional Rate line items.
 - f. Educational Travel Reimbursement
 - g. Unearned Income
 - h. Earned Income
 - i. Earned Income Disregard
2. Allow user input for these fields and set the default value to '0.00' on the page.
 - a. The Rate Payment field when an ARC aid code is selected will be defaulted to '0.00' and will not be editable.
3. Add the following validation for the fields when the Calculate and Accept buttons are clicked:
 - a. [Field Name] - Please enter an amount in xx,xxx,xxx.xx format.
4. Use the existing logic, linked to the Calculate and Accept button based on updating the fields or calculating before Accepting EDBC, for the fields mentioned in 2.1.3.1.
5. Associate the following symbol to represent the action of the fields:
 - a. Rate Payment (\$)
 - b. Special Care Increment (+)
 - c. Infant Supplement Payment (+)
 - d. Infant Supplemental Rate Supplement (+)
 - e. Additional Rate (+)
 - f. Educational Travel Reimbursement (+)
 - g. Unearned Income (-)
 - h. Earned Income (-)
 - i. Earned Income Disregard (+)
6. Update the Calculate button to populate the Potential Benefit amount performing the following:
 - a. Add the Rate Payment
 - b. Add the Special Care Increment

- c. Add the Infant Supplement Payment
 - d. Add the Infant Supplemental Rate Supplement
 - e. Add the Additional Rate
 - f. Add the Educational Travel Reimbursement
 - g. Subtract the Unearned Income
 - h. Subtract the Earned Income
 - i. Add the Earned Income Disregard
7. Update the existing Potential Benefit field to not be editable.
 - a. Display the amount as a hyperlink when Fiscal Expenditure data exists in View Mode. Historical FC EDBC's do not display the amount as a hyperlink. This change is also applicable to Approved Relative Caretaker (ARC) aid codes.
 8. These fields are saved to an existing table – Fiscal Potential Benefit – to store the potential benefits of each fiscal expenditure when the Calculate button is clicked.
 9. Update the Foster Care EDBC (Manual) page to display Placement Type under the Authorized Amount Per Aid Code section (see Figure 2.1.2).
 10. Store the data in an existing table – Fiscal Expenditure –using the information in the Authorize Amount Per Aid Code section when the Accept button is clicked.
 11. All changes also apply to ARC.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Create a PMCR to add the new fields on the page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Potential Benefit Detail page

2.2.1 Overview

A child page from the Foster Care/Kin-GAP/AAP EDBC (Manual) page displays all the Fiscal Expenditure table data when clicking on the Potential Benefit hyperlink.

2.2.2 Potential Benefit Detail Mockup

Potential Benefit Detail

						Close
Expenditure	Aid Code	Pay Code	Placement Type	Rate Structure	Potential Benefit	
Placement Rate	5K	EC EA Ineligible Emergency Placement Prior to Home Approval	Nonrelative Extended Family Member Home	Non-CCR	\$2,617.00	
Special Care Increment	5K	EC EA Ineligible Emergency Placement Prior to Home Approval	Nonrelative Extended Family Member Home	Non-CCR	\$300.00	
Infant Supplemental Payment	5K	EC EA Ineligible Emergency Placement Prior to Home Approval	Nonrelative Extended Family Member Home	Non-CCR	\$411.00	
Infant Supplemental Rate Supplement	5K	EC EA Ineligible Emergency Placement Prior to Home Approval	Nonrelative Extended Family Member Home	Non-CCR	\$489.00	
Education Travel Reimbursement	5K	EC EA Ineligible Emergency Placement Prior to Home Approval	Nonrelative Extended Family Member Home	Non-CCR	\$347.00	
County Supplemental Allowance	5K	EC EA Ineligible Emergency Placement Prior to Home Approval	Nonrelative Extended Family Member Home	Non-CCR	\$1,000.00	
					Total: \$5,146.00	
						Close

Figure 2.2.1 – Potential Benefit Detail page

2.2.3 Description of Changes

1. Use the existing child page (Fiscal History Expenditure Detail) created with DDID 2191 (CA-207140), populate the page using the EDBC's Fiscal Expenditure table, containing the following columns and values:
 - a. Expenditure: This is the Expenditure Type from the Fiscal Expenditure table.
 - b. Aid Code: This is the Aid Code from the Fiscal Expenditure table.

- c. Pay Code: This is the Pay Code from the Fiscal Expenditure table.
- d. Placement Type: This is the Placement Type from the Fiscal Expenditure table
- e. Rate Structure: This is the Rate Structure from the Fiscal Expenditure table
- f. Potential Benefit: This is the Expenditure Potential Benefit from the Fiscal Expenditure table
- g. Total: This is the sum of all the Expenditure Potential Benefit amounts for the EDBC
- h. Close: This is a button that navigates back to the Foster Care EDBC (Manual) page when clicked

Note: The Expenditure Types are listed in the following order:

- Placement Rate
 - Special Care Increment
 - Infant Supplemental Payment
 - Infant Supplemental Rate Supplement
 - Education Travel Reimbursement
 - Additional Payments (in alphabetical order by short description)
2. Rename the page to Potential Benefit Detail FC/AAP/KG manual EDBCs.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A – This page has the same security as the EDBC. If the user can view the EDBC, the user can view this page.

2.2.6 Page Mapping

Create new page mappings for the Potential Benefit Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Kin-GAP EDBC (Manual)

2.3.1 Overview

The manual KG EDBC includes the changes made with DDID 2191 to consolidate issuances and distinguish fiscal expenditures.

2.3.2 Kin-GAP EDBC (Manual) Mockup

Aid Payment	
Rate Payment:	\$ 0.00
Special Care Increment:	+ 0.00
Infant Supplement Payment:	+ 0.00
Infant Supplemental Rate Supplement:	+ 0.00
Additional Rate:	+ 0.00 Add
Total Net Nonexempt Income	- 0.00
Potential Benefit:	\$ 0.00
Previous Potential Benefit:	\$ 0.00
Overpayment Adjustment Amount	\$ 0.00
Authorized Amount	\$ 0.00
Overpayment	\$ 0.00

Calculate

Figure 2.3.1 – Kin-GAP EDBC (Manual) Aid Payment Section

2.3.3 Description of Changes

1. Add the following fields under the Aid Payment section of the Kin-GAP EDBC (Manual) page:
 - a. Rate Payment
 - b. Special Care Increment
 - c. Infant Supplement Payment
 - d. Infant Supplemental Rate Supplement
 - e. Additional Rate
 - i. Add a dropdown of Additional Rate Types:
 1. The available options are the following:
 - a. Blank
 - b. County Authorized Allowance
 - c. Kidstep Supplement

Note: Infant Supplement related options will not be added to the dropdown.
 2. The values in the dropdown are in alphabetical order.

- ii. Add a validation on the 'Add' button when clicked and a value is entered without a type selected. The validation states the following:
 - 1. "Add – Please select an Additional Rate Type"
 - iii. The line item is added with a new Add button.
 - 1. The Add button creates a new line item with the Additional Rate Type, value inputted and a Remove button.
 - a. The Remove button removes the line item.
 - iv. The user has the ability to add multiple Additional Rate line items.
 - f. Total Net Nonexempt Income
- 2. Allow user input for these fields and set the default value to '0.00' on the page.
- 3. Add the following validation for the fields when the Calculate and Accept buttons are clicked:
 - a. [Field Name] - Please enter an amount in xx,xxx,xxx.xx format.
- 4. Use the existing logic, linked to the Calculate and Accept button based on updating the fields or calculating before Accepting EDBC, for the fields mentioned in 2.3.3.1.
- 5. Associate the following symbol to represent the action of the fields:
 - a. Rate Payment (\$)
 - b. Special Care Increment (+)
 - c. Infant Supplement Payment (+)
 - d. Infant Supplemental Rate Supplement(+)
 - e. Additional Rate (+)
 - f. Total Net Nonexempt Income (-)
- 6. Update the Calculate button to populate the Potential Benefit amount performing the following:
 - a. Add the Rate Payment
 - b. Add the Special Care Increment
 - c. Add the Infant Supplement Payment
 - d. Add the Infant Supplemental Rate Supplement
 - e. Add the Additional Rate
 - f. Subtract the Total Net Nonexempt Income
- 7. Update the existing Potential Benefit field to not be editable.
- 8. These fields are saved to an existing table – Fiscal Potential Benefit – to store the potential benefits of each fiscal expenditure when the Calculate button is clicked.
- 9. Store the data to an existing table – Fiscal Expenditure – using the information the Authorize Amount Per Aid Code section when the Accept button is clicked.
- 10. Update the amount of the Potential Benefit line item to link to the new Potential Benefit Detail page.
 - a. Display the amount as a hyperlink when Fiscal Expenditure data exists in View Mode. Historical KG EDBC's do not display the amount as a hyperlink.

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Create a PMCR to add the new fields on the page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 AAP EDBC (Manual)

2.4.1 Overview

The manual AAP EDBC includes the changes made with DDID 2191 to consolidate issuances and distinguish fiscal expenditures.

2.4.2 AAP EDBC (Manual) Mockup

Aid Payment	
Rate Payment:	\$ 0.00
Special Care Increment:	+ 0.00
Additional Rate:	+ 0.00 Add
Potential Benefit:	\$ 0.00
Previous Potential Benefit:	\$ 0.00

Figure 2.4.1 – AAP EDBC (Manual) Aid Payment Section

Authorized Amount Per Rate Structure				
Aid Code	Auth Amount	Number of Days	Rate Structure	Placement Type
03	\$1,000.00	31	CCR	Adoptive Homes

Figure 2.4.2 – AAP EDBC (Manual) Authorized Amount Per Aid Code Section

2.4.3 Description of Changes

1. Add the following fields under the Aid Payment section of the AAP EDBC (Manual) page:
 - a. Rate Payment
 - b. Special Care Increment
 - c. Additional Rate
 - i. Add a dropdown of Additional Rate Types:
 1. The available options are the following:
 - a. Blank
 - b. County Authorized Allowance
 - c. Kidstep Supplement

Note: Infant Supplement related options will not be added to the dropdown.
 2. The values in the dropdown are in alphabetical order.
 - ii. Add a validation on the 'Add' button when clicked and a value is entered without a type selected. The validation states the following:
 1. "Add – Please select an Additional Rate Type"
 - iii. The line item is added with a new Add button.
 1. The Add button creates a new line item with the Additional Rate Type, value inputted and a Remove button.
 - a. The Remove button removes the line item.
 - iv. The user has the ability to add multiple Additional Rate line items.
2. Allow user input for these fields and set the default value to '0.00' on the page.
3. Add the following validation for the fields when the Calculate and Accept buttons are clicked:
 - a. [Field Name] - Please enter an amount in xx,xxx,xxx.xx format.
4. Use the existing logic, linked to the Calculate and Accept button based on updating the fields or calculating before Accepting EDBC, for the fields mentioned in 2.4.3.1.
5. Associate the following symbol to represent the action of the fields:
 - a. Rate Payment (\$)
 - b. Special Care Increment (+)
 - c. Additional Rate (+)
6. Update the Calculate button to populate the Potential Benefit amount performing the following:
 - a. Add the Rate Payment
 - b. Add the Special Care Increment
 - c. Add the Additional Rate
7. Update the existing Potential Benefit field to not be editable.
8. Save these fields to an existing table – Fiscal Potential Benefit – to store the potential benefits of each fiscal expenditure when the Calculate button is clicked.

9. Update the AAP EDBC (Manual) page to display Placement Type under the Authorized Amount Per Aid Code section.
10. Store the data in an existing table – Fiscal Expenditure –using the information in the Authorize Amount Per Aid Code section when the Accept button is clicked.
11. Update the amount of the Potential Benefit line item to link to the new Potential Benefit Detail page.
 - a. Display the amount as a hyperlink when Fiscal Expenditure data exists in View Mode. Historical AAP EDBCs do not display the amount as a hyperlink.

2.4.4 Page Location

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

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Create a PMCR to add the new fields on the page.

2.4.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2117	<p>Original: The CONTRACTOR shall modify Manual EDBC process to generate and issue benefits for Foster Care, AAP, Kin-GAP, ARC.</p> <p>Revised: The CONTRACTOR shall modify Manual EDBC process to generate and issue benefits for Foster Care, AAP, and Kin-GAP.</p>	This DDID will account for the complete manual EDBC changes required for payment consolidation as well. (DDID# 2191)	<p>Manual EDBC's for FC, AAP, and KG are updated with additional fields based on the changes made with DDID 2191.</p> <p>Requirement revised to remove ARC since ARC is the aid code on the FC program.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207166 | DDID 2116

EDBC Logic for NRLG's

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway, Erika Kusnadi
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/01/2020	.01	Initial Draft	Paul Galloway

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1 OVERVIEW

The Continuum of Care Reform (CCR) rate changes that took effect January 2017 moved most existing Home-Based Foster Care (HBFC) placements to new rate schedules. The exception was Non-Related Legal Guardian (NRLG) placements established prior to January 2017 (ACL 16-79, ACL 16-79E, ACL 17-11).

LRS and C-IV do not identify Foster Care (FC) NRLG placements established prior to that date in the same way. Prior to migration, LRS/CalSAWS EDBC logic will need to be able to identify NRLG placements for both Los Angeles County and the former C-IV counties and determine when they were established to pay the correct rates.

1.1 Current Design

C-IV:

The "Non-Related Legal Guardianship" Placement Authority type is used to identify NRLG placements. The Begin Date of the Placement Authority is considered the date the guardianship was established.

Rates for FC placements are set by workers selecting the appropriate rate schedule on the Rate Detail page. When the CCR rate increase was implemented effective 1/1/2017 (C-IV SCR 5750), a data change in C-IV inserted new Rate Detail records for most existing HBFC placements to move them to the new rate schedule. The exception was cases with a "Non-Related Legal Guardianship" Placement Authority that began prior to 1/1/2017. NRLG cases continued to pay the rate schedule previously set by a worker on the Rate Detail page.

LRS/CalSAWS:

A matrix was established (SCR CA-46366, updated with CA-50388) to identify NRLG placements. The matrix uses the Facility Type and Care Provider Relationship to Child fields on the Child Placement Detail page. Any placement where both fields match one of the matrix rows (Appendix 1 LRS/CalSAWS FC NRLG Matrix) is treated as an NRLG by EDBC.

LRS/CalSAWS moved most existing HBFC placements to the new CCR rates (SCR CA-46366) by making an update to EDBC logic rather than by making updates to data on the Rate Detail page like C-IV did. The change, starting with FC EDBC's for benefit month January 2017, pays all HBFC placements the new CCR Rates **unless** the placement is an NRLG where the Begin Date of the placement is prior to 1/1/17. For those NRLG's that began prior to 1/1/2017, FC EDBC will pay Schedule A or B based on the value selected on the Rate Detail page.

The difference between the LRS/CalSAWS method and the C-IV method is that C-IV updated the rates for all placements moving to the new rate schedule and left the selections on the Rate Detail page for NRLG's established prior to January 2017 unchanged. LRS implemented the change with EDBC logic that

started paying the new rates to all affected placements without updating online rate data, but that requires EDBC to continue to be able to identify NRLG's established prior to CCR so they will remain on non-CCR rates to which they are eligible per policy.

1.2 Requests

FC EDBC logic for HBFC placements will still use the existing LRS/CalSAWS NRLG Matrix logic, and if a placement is not determined to be an NRLG in that process, a second check based on the Placement Authority will determine if a converted placement is an NRLG.

There are a few existing Los Angeles County placements in LRS that are not identified as NRLG's using the NRLG Matrix logic but could be identified as NRLG placements by the additional logic. If their Placement Authority began prior to 1/1/17 they might start getting a lower rate due to this change. This is a very small number of cases that will need to be reviewed prior to implementation of this SCR.

1.3 Overview of Recommendations

1. Modify the FC EDBC NRLG logic to continue to use the existing matrix logic, but when a case is not determined to be an NRLG by the matrix, also check if the Placement Authority for the benefit period is "Non-Related Legal Guardianship." If it is, the placement will be considered NRLG and the Begin Date on the Placement Authority will be used to determine if it is eligible to CCR or non-CCR rates.
2. Provide a list to Los Angeles County prior to implementation of this SCR. The list will include active FC cases that do not meet the LRS FC EDBC NRLG Matrix conditions but do have a NRLG Placement Authority record with a begin date prior to 1/1/2017. These cases will need to be reviewed and updated to keep them from reverting to non-CCR rates when this SCR is implemented.

1.4 Assumptions

1. Existing FC Placements with the facility type 'Legal Guardian' in C-IV will be converted to CalSAWS as 'Legal Guardian' placements. This is not a change. It is only being noted here because there had been earlier discussion of converting them as 'Guardian Home' placements if they were to be evaluated using the existing FC EDBC NRLG Matrix.
2. Existing FC EDBC logic in LRS/CalSAWS prevents any NRLG that began prior to 1/1/2017 from being paid CCR rates even if a CCR rate is selected on the Rate Detail page. If a CCR rate is incorrectly selected for one of these NRLG placements, EDBC will pay the age-based rate for guardianships established prior to 1/1/2017 instead of the selected CCR rate.

2 RECOMMENDATIONS

2.1 Eligibility Updates

2.1.1 Overview

The current EDBC logic for determining if a placement is NRLG uses the NRLG Matrix and the Begin Date from the Child Placement record. This SCR adds a second condition that checks for an NRLG Placement Authority type and uses the Begin Date of the Placement Authority to determine if CCR or non-CCR rates will be paid. This second condition is only considered if the first condition was not met.

2.1.2 Description of Changes

Modify the FC EDBC NRLG logic to include two conditions:

1. (Existing logic) Determine if a placement is NRLG using the existing conditions of the FC EDBC NRLG Matrix. If it is an NRLG based on the matrix, use the beginning date on the Child Placement to determine if the NRLG was:
 - a. Established prior to 1/1/2017 and is only eligible to non-CCR rates.
 - b. Established on or after 1/1/2017 and is eligible to CCR rates.
2. (Additional logic) Add a second check only if the case is not determined to be NRLG in the previous step. If the Placement Authority in effect on the first day of the budget being processed is "Non-Related Legal Guardianship" (code Table 1586, Code 04) the placement is NRLG. If it meets this condition, use the beginning date on the Placement Authority record to determine if the NRLG was:
 - a. Established prior to 1/1/2017 and is only eligible to non-CCR rates.
 - b. Established on or after 1/1/2017 and is eligible to CCR rates.

2.1.3 Programs Impacted

Foster Care

2.1.4 Performance Impacts

Impact on performance should be negligible.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2116	<p>Original: The CONTRACTOR shall add a "Guardianship Establish Date" field on the Child Placement Detail Page that only displays when relationship to child and placement type combination matrix matches NRLG (non-related legal guardian) in the CalSAWS Software.</p> <p>The CONTRACTOR shall update the matrix (NRLG) in CalSAWS to account for additional placement types for all 58 Counties.</p> <p>The CONTRACTOR shall populate the guardianship establish date with the NRLG placement authority begin date from the Placement Authority Page for Conversion for all 58 Counties.</p> <p>The CONTRACTOR shall populate the guardship establish date with the child placement begin date from the child placement date as a data change in the CalSAWS Software.</p> <p>The CONTRACTOR shall update the LRS DCFS Interface to populate the child placement begin date in the new</p>	<p>Original:</p> <ul style="list-style-type: none"> - This data conversion is applicable only for C-IV Data. - For CalWIN data, this conversion will be from data residing within each of the 18 CalWIN "Core" databases, one for each county if data is available. <p>Revised:</p>	<p>Updated the FC EDBC logic to account for cases that are converted into CalSAWS as NRLG's by checking the Placement Authority type if it doesn't meet the existing NRLG Matrix. By doing this it was no longer necessary to add the new date field or make the additional conversion and interface changes listed in the original DDID.</p>

	<p>guardianship establish date only for Los Angeles County.</p> <p>Revised:</p> <p>The CONTRACTOR shall update the Foster Care EDBC logic that determines which placements are Non-Related Legal Guardian to pay the correct rate.</p>		
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4 OUTREACH

4.1 Lists

Provide a list to Los Angeles County prior to implementation of this SCR. The list will include active FC cases that do not meet the LRS FC EDBC NRLG Matrix conditions but do have a NRLG Placement Authority record with a begin date prior to 1/1/2017. These cases will need to be reviewed and updated to keep them from reverting to non-CCR rates when this SCR is implemented.

List Name:

NRLG Placement Authority prior to 2017 on non-NRLG Matrix Placements

List Criteria:

- Cases with a Foster Care program in an Active status; **and**,
- The active Child Placement record does not have a 'Facility Type' and 'Care Provider Relationship to Child' combination that matches one of the rows in Appendix 1 (LRS/CalSAWS FC NRLG Matrix); **and**,
- The active Placement Authority is "Non-Related Legal Guardianship" (code Table 1586, Code 04); **and**,
- The Begin Date of the Placement Authority is prior to 1/1/2017.

Standard Columns:

1. Case Name
2. Case Number
3. County
4. Unit
5. Unit Name
6. Office Name
7. Worker ID
8. Facility Name

Additional Column(s):

9. NRLG Placement Authority Begin Date
10. Current Rate Type (from PLACEMT_RATE.TYPE_CODE)
11. Rate Schedule (from PLACEMT_RATE.BASIC_RATE_CODE)
12. Level of Care (from PLACEMT_RATE.LEVEL_OF_CARE_CODE)

Frequency: This is a one-time list that will be provided to Los Angeles County several weeks prior to this SCR being implemented in Production so they may review and update the Placement, Rate, and Placement Authority information as needed to pay the correct rate after this SCR is implemented.

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-207166

5 APPENDIX

5.1 Appendix 1 - LRS/CalSAWS FC NRLG Matrix

Any placement where both the 'Facility Type' and 'Care Provider Relationship to Child' fields on the Child Placement Detail page match one of the rows in this table is considered a Non-Related Legal Guardianship:

Facility Type	Care Provider Relationship to Child
Guardian Home	Non-Relative Guardian
Court Specified Home	Non-Relative Guardian
Foster Family Home	Non-Relative Guardian
Relative Home	Non-Relative Guardian
Nonrelative Extended Family Member Home	Non-Relative Guardian
Small Family Home	Non-Relative Guardian
Guardian Home	Non-Relative Non-Guardian
Resource Family Home (RFH)	Non-Relative Non-Guardian
Resource Family Home (RFH)	NREFM Guardian
Resource Family Home (RFH)	NREFM Non-Guardian

5.2 Appendix 2 – Home-Based Foster Care Placement Types

For the purposes of determining whether to pay non-CCR or CCR rates in this SCR, the following placement types are considered Home-Based Foster Care (HBFC):

1. Foster Family Home
2. Small Family Home
3. Foster Family Home-Shelter Care
4. Legal Guardian
5. Nonrelative Extended Family Member Home
6. Relative Home
7. Specialized Foster Family Home
8. Tribal Specific Home
9. Supervised Independent Living
10. County Shelter/Receiving Home (Non EA/AFDC)
11. Court Specified Home
12. Guardian Home
13. Resource Family Home (RFH)
14. Temporary Shelter Home

(Note: 'Out of State Basic' Placement Types are also considered HBFC in EDBC rules. They only accept Non-Standard rates online in LRS/CalSAWS, so the rate determination logic being updated in this SCR does not affect them.)

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207303 | DDID 1526

Display Customer Appointments on User
Outlook Calendars

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Melissa Mendoza, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/21/2020	1.0	Initial Revision	Farhat Ulain
09/17/2020	1.1	Document Updated based on QA Comments	Farhat Ulain
9/22/2020	1.2	Updated to reflect counties can opt in to the cancellation email only	Amy Gill

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1 OVERVIEW

This design outlines the updates to appointment functionality in LRS/CalSAWS to allow customer appointments to be displayed on the user's Outlook and/or GroupWise calendar.

1.1 Current Design

In LRS/CalSAWS, a user's Outlook calendar is not synchronized with customer appointment functionality. Therefore, customer appointments created in LRS/CalSAWS are not displayed on the user's Outlook calendar.

1.2 Requests

Per Design Differences ID (DDID) 1526, create a process where customer appointments created in LRS/CalSAWS will display on a user's Outlook and/or GroupWise calendar.

1.3 Overview of Recommendations

1. Add the ability for customer appointments to be displayed on the user's Outlook or GroupWise calendar when creating an appointment in the LRS/CalSAWS system.

1.4 Assumptions

1. Counties will have their Outlook or GroupWise calendars configured to save appointments to their calendars.
2. The email address for outbound emails from the LRS/CalSAWS system will be updated with DDID 1991 SCR CA-218806.
3. For counties to update their preference, a SCR would need to be created.

2 RECOMMENDATIONS

2.1 Create Outlook/GroupWise Calendar Event

2.1.1 Overview

Add the ability for customer appointments to be displayed in a user's Outlook/GroupWise calendar when created from the 'Pending Assignment List' and 'Customer Appointment Detail' pages.

2.1.2 Page Mockup

N/A – No page changes.

2.1.3 Description of Change

1. When creating an appointment through the Pending Assignment List or Customer Appointment Detail pages, the user will receive an email to their Worker's email address with the event attached.
2. When the user accepts the event, the selected date and time will be displayed on user's Outlook/Groupwise calendar.
3. An example of the Appointment email format is given below.

Note:

- Some email labels may appear differently based on the user's Outlook/GroupWise settings.
- The Organizer/domain email address will be updated to CalSAWS through DDID 1991 SCR CA-218806 in a later release.

Organizer: lrsapplication@dps.lacounty.gov

Subject: <Appointment Category></Appointment Type (if any)>

Time: <Date and Time of the Appointment>

Location: <Location field as entered in the Customer Appointment Detail page>

Body:

When: <Month Day, Year> <Start Time AM/PM – End Time AM/PM>
(UTC-08:00) Pacific Time (US & Canada)

Where: <Location field as entered in the Customer Appointment Detail page>

~~*~*~*~*~*~*~*~*

A customer appointment has been created for you within CalSAWS.

Case Number: <Case Number>

Customer(s):

<Customer Name>: <Phone Numbers (if applicable)>

Comments:

<Comments as entered in the 'Appointment Letter Comments' box on the Customer Appointment Detail page.>

The customer's phone numbers will be displayed after the Customer Name only for phone appointment, as determined by the Appointment Category and/or Type in Table 2.1.1.

Appointment Category	Appointment-Type
General Appointment	<ul style="list-style-type: none"> • 2nd Telephone Interview Recertification • Telephone Interview Intake • Telephone Interview Recertification
Telephone CW/CF RE Interview	N/A
Telephone Interview	N/A

Table 2.1.1

- An example of the Appointment email format without a calendar event attached is given below:

From: lrsapplication@dpss.lacounty.gov

Subject: Category/Appointment-Type (if any) – Scheduled

Body:

A customer appointment has been scheduled within CalSAWS. Please update your local e-mail calendar.

Date: <Appointment Date>

Time: <Start Time AM/PM – End Time AM/PM>

Location: <Location field as entered in the Customer Appointment Detail page>

Case Number: <Case Number>

Customer(s):

<Customer Name>: <Phone Numbers (if applicable)>

Comments:

<Comments as entered in the 'Appointment Letter Comments' box on the Customer Appointment Detail page.>

- When rescheduling an already existing appointment, the user will receive a new email to their Worker's email address with the event attached which will be displayed on the user's Outlook/GroupWise calendar upon saving the event.
- Rescheduling or canceling an appointment will not automatically update the Outlook/GroupWise calendar. Users must delete the old appointment from their calendar and save the new one. However, the

user will receive a cancellation email for the previously scheduled appointment if the county has opted in.

7. An example of the Appointment Cancellation email format is given below:

From: lrsapplication@dpss.lacounty.gov

Subject: Category/Appointment-Type (if any) – CANCELED

Body:

A customer appointment has been canceled within CalSAWS.
Please update your local e-mail calendar.

Date: <Appointment Date>

Time: <Start Time AM/PM – End Time AM/PM>

Location: <Location field as entered in the Customer Appointment Detail page>

Case Number: <Case Number>

Customer(s):

<Customer Name>; <Phone Numbers (if applicable)>

Comments:

<Comments as entered in the 'Appointment Letter Comments' box on the Customer Appointment Detail page.>

8. This functionality is enabled based on County preference. See the table below. The County options are:

- a. No email is sent.
- b. Appointment email sent (with or without Calendar event attached).
- c. Cancellation email sent.

Note:

- For Counties that did not provide a response, this process will not be turned on and no emails will be received.
- Los Angeles County users will continue to receive only the Cancellation email.

County #	County	No email	Appointment Email (w/Calendar event unless noted)	Cancellation Email
01	Alameda		X	X
02	Alpine	No Response		
03	Amador	No Response		
04	Butte	No Response		
05	Calaveras	No Response		
06	Colusa	No Response		
07	Contra Costa		X	X
08	Del Norte	No Response		

County #	County	No email	Appointment Email (w/Calendar event unless noted)	Cancellation Email
09	El Dorado	No Response		
10	Fresno		X	X
11	Glenn	No Response		
12	Humboldt	No Response		
13	Imperial	No Response		
14	Inyo	No Response		
15	Kern	No Response		
16	Kings	No Response		
17	Lake	No Response		
18	Lassen	No Response		
19	Los Angeles			X
20	Madera	No Response		
21	Marin	No Response		
22	Mariposa	No Response		
23	Mendocino	No Response		
24	Merced	No Response		
25	Modoc	No Response		
26	Mono	No Response		
27	Monterey	No Response		
28	Napa	No Response		
29	Nevada	No Response		
30	Orange		X	X
31	Placer		X	X
32	Plumas	No Response		
33	Riverside	No Response		
34	Sacramento		X	X
35	San Benito	No Response		
36	San Bernardino	No Response		
37	San Diego		X	X
38	San Francisco		X	X
39	San Joaquin	No Response		
40	San Luis Obispo		X	X
41	San Mateo		X	X
42	Santa Barbara		X	X
43	Santa Clara	No Response		
44	Santa Cruz		X	X
45	Shasta	No Response		
46	Sierra	No Response		
47	Siskiyou	No Response		
48	Solano		X	X
49	Sonoma		X	X
50	Stanislaus	No Response		
51	Sutter	No Response		

County #	County	No email	Appointment Email (w/Calendar event unless noted)	Cancellation Email
52	Tehama	No Response		
53	Trinity	No Response		
54	Tulare	X		
55	Tuolumne	No Response		
56	Ventura		X - No calendar event	X
57	Yolo		X	X
58	Yuba	No Response		

Table 2.1.2

2.1.4 Page Locations

- **Global:** Case Info
- **Local:** New Application
- **Task:** New Application >Pending Assignment List Page

- **Global:** Eligibility
- **Local:** Customer Schedule
- **Task:** Appointments

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1526	<p>Original: The Contractor shall enable one-way sync for 58 counties where customer appointments created within the new application are displayed automatically on user's Outlook and/or GroupWise Calendar.</p> <p>Revised: The Contractor shall enable one-way sync for 58 counties where customer appointments created within the application are displayed on a user's Outlook and/or GroupWise Calendar.</p>	<p>Original: The CalWIN counties would have Outlook or GroupWise calendars configured to accept appointments created in the system.</p> <p>Revised: Counties will have Outlook or GroupWise calendars configured to accept appointments created in the system.</p>	User's email will be configured in the LRS/CalSAWS system to receive the appointment notification and displayed on their calendar.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207309 | DDID 1490

Update to Referral Form

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/11/2020	1.0	Initial Draft	Yale Yee
9/7/2020	1.1	Updated cosmetic changes based on QA comments	Yale Yee
9/28/2020	1.2	Update based on Deliverable comments and comments from Build team.	Amy Gill

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1 OVERVIEW

Users have the ability to generate a County Referral form (PA 30) on the Reception Log Detail page and in the Template Repository. The PA 30 will be updated to be a generic referral form to accommodate all 58 counties.

1.1 Current Design

In LRS/CalSAWS, the user has the ability to generate the PA 30 on the Reception Log Detail page and in the Template Repository.

1.2 Requests

The PA 30 will be updated to be a generic referral form to accommodate all 58 counties.

1.3 Overview of Recommendations

1. Create a new CSF 130 form based on the PA 30.
2. Update the "District" field to "Office".
3. Update the form number to CSF 130 (version number) on the footer and in Template Repository, and update the form generation logic on the Reception Log Detail page to generate the new form.

1.4 Assumptions

1. The header for this form will be updated with a global header change in Release 20.11 (CA-214196).
2. The version number for the form is based on the date the change is implemented into the system.
3. There are no changes to existing data population on the form.

2 RECOMMENDATIONS

2.1 County Referral Form

2.1.1 Overview

The PA 30 will be updated to be a generic referral form to accommodate all 58 counties.

Form Title: County Referral

Form Number: CSF 130 (version number)

Language: English only

2.1.2 Description of Change

1. Create a new form based on the PA 30 and update the form number to CSF 130 (version number) on the footer and in Template Repository.
2. Update the record in the Document Template table to end date the PA 30 form and make it unavailable from the Template Repository. Add a new record in the Document Template table for the CSF 130 and make it available from the Template Repository.
3. Update the "District" field to "Office".
4. Update the Generate Referral button logic on the Reception Log Detail page to generate the CSF 130 instead of the PA 30.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 130 mock up	CSF130.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1490	<p>Original:</p> <p>The "Generate Referral" button on the Reception Log Detail page shall be updated to generate the appropriate Referral forms that applies to each CONSORTIUM County. A generic Referral Form shall be created for the 57 Counties that is equivalent to the PA 30 Non-State Form.</p> <p>Revised:</p> <p>The "Generate Referral" button on the Reception Log Detail page shall be updated to generate a generic Referral Forms for the 58 Counties.</p>	None	The PA 30 is updated to be a generic referral form to accommodate all 58 counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207320 | DDID 1457, 1458, 1461, 1462, 1464,
1466, 1467, and 1469

Updates to Customer Need Category and
Customer Need Category Type Hierarchy

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/29/2019	1.0	Initial Revision	Duke Vang
5/1/2019	1.1	Added recommendation for CT 1870	Duke Vang
8/15/2020	1.2	Added SUAS, Infant Supplemental, and Credit Repair/Past Evictions	Duke Vang
9/16/2020	1.3	Updated assumptions for Migration Requirements	Duke Vang
9/28/2020	1.4	Updates from DEL Comments	Duke Vang

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1 OVERVIEW

1.1 Current Design

The Need Detail page documents the needs of a Customer to meet an Activity or Need. In documenting the Need, a Worker must select a "Category" (Customer Need Category). The "Category" will drive the available options under the "Type" (Customer Need Type) dropdown field. Only certain "Type" values will be available under certain "Category" values. The mechanism that controls the dynamic display of "Type" values is the code hierarchy.

1.2 Requests

Per Design Differences Identification (DDID) 1457, 1458, 1461, 1462, 1464, 1466, 1467, and 1469, the following Customer Need Types need to be available options under the "Type" dropdown field when the following Customer Need Categories are selected as the "Category" on the Need Detail page:

1. Transportation
 - a. DMV Fees/License
 - b. Vehicle Services
2. Ancillary – Work Related
 - a. Job Services
 - b. Job Skills Training
 - c. On the Job Experience
 - d. Placement Assistance
 - e. Retention Services
3. LD Accommodations
 - a. Limited disability – accommodations

The following Customer Need Types will be added to the System for historical purpose only to decode legacy records from the C-IV Migration Counties. These values will not display on the "Type" dropdown field on the Need Detail page:

1. Infant Supplemental Rate – State
2. SUAS
3. Credit Repair/Past Evictions

1.3 Overview of Recommendations

The Customer Need Category to Customer Need Type code hierarchy will be updated to reflect additional Customer Need Type mappings to the following Customer Need Categories: Transportation, Ancillary – Work Related, Housing Support Program, and LD Accommodations.

1.4 Assumptions

1. No new additional Pay Codes or Fund Codes will be added.
2. No interface county testing will be performed.
3. The County Code reference column for the Customer Need to Program Map (CT 1870) codes table is not utilized by the Service Arrangement Detail page. All codes tables entries for CT 1870 will be applicable for all counties.
4. The C-IV General Assistance (Managed) program is added to the CalSAWS System by DDCR 10002 CA-201377.
5. CA-212943 (20.11) will be adding functionality to allow counties to maintain their own Need Type Thresholds. Some reference columns from CT 1870 will be deprecated and moved to a separate "Need Type Threshold" database table. All Need Types mentioned in recommendation 2.1.2.4 will already be migrated into the new "Need Type Threshold" table since they are existing Need Types in CalSAWS since C-IV baseline.

2 RECOMMENDATIONS

2.1 Codes Table Change Request

2.1.1 Overview

The Need Detail page documents the needs of a Customer to meet an Activity. Per DDID 1457, 1458, 1461, 1462, 1464, 1466, 1467, and 1469, the Customer Need Category to Customer Need Type code hierarchy will be updated to reflect additional Customer Need Type mappings to the following Customer Need Categories: Transportation, Ancillary – Work Related, and LD Accommodations.

2.1.2 Description of Changes

1. Update the short and long description for “Limited disability – accommodations” to “Limited Disability – Accommodations” under Codes Table Category 164.

Note: This change is to address an existing typo only. This change will have no impact to the value or functionality of the system.

2. Add new entries to the Customer Need Type codes table (CT 164) effective from MIN_DATE to HIGH_DATE:
 - a. SUAS
 - b. Infant Supplemental Rate – State
 - c. Credit Repair/Past Evictions
 - i. WDTIP Diversion Reason: 020

Note: SUAS, Infant Supplemental Rate – State, and Credit Repair/Past Evictions are being added in order to decode historical C-IV Need Detail records. These values will not be shown on the “Type” dropdown field on the Need Detail page.

3. Make the following updates to the code hierarchy for Customer Need Category (CT 163):

Parent Category ID	Parent Code ID	Parent Code Description	Child Code ID	Child Code Description
163	6402	Transportation	6407	DMV Fees/License
163	6402	Transportation	6459	Vehicle Services
163	9998	Ancillary – Work Related	6434	Job Services
163	9998	Ancillary – Work Related	6435	Job Skills Training

Parent Category ID	Parent Code ID	Parent Code Description	Child Code ID	Child Code Description
163	9998	Ancillary – Work Related	6438	On the Job Experience
163	9998	Ancillary – Work Related	6433	Placement Assistance
163	9998	Ancillary – Work Related	6440	Retention Services
163	20777	LD Accommodations	9997	Limited Disability – Accommodations

Note: All code hierarchy entries are effective immediately and retroactively (from MIN_DATE to HIGH_DATE).

4. Add entries to the Customer Need to Program Map (CT 1870) for the following Customer Need Type with the following new values:

a. DMV Fees/License

- i. Need Category: TR
- ii. Need Type: 03
- iii. Program Code: CL, FT, WT, RE
- iv. Issuance Category: SP
- v. Max Dollar: 1000
- vi. Max Quantity: null
- vii. Period: null
- viii. Supervisor Approval: Y
- ix. Deputy Approval: 350
- x. County Code: null
- xi. EBT: Y
- xii. Warrant: Y
- xiii. Direct Deposit: null

b. Vehicle Services

- i. Need Category: TR
- ii. Need Type: 55
- iii. Program Code: CL, FT, WT, RE
- iv. Issuance Category: SP
- v. Max Dollar: 1000
- vi. Max Quantity: null
- vii. Period: null
- viii. Supervisor Approval: Y
- ix. Deputy Approval: 350
- x. County Code: null
- xi. EBT: Y
- xii. Warrant: Y

- xiii. Direct Deposit: null
- c. Job Services
 - i. Need Category: AW
 - ii. Need Type: 30
 - iii. Program Code: CL, FT, WT, RE
 - iv. Issuance Category: SP
 - v. Max Dollar: 1000
 - vi. Max Quantity: null
 - vii. Period: null
 - viii. Supervisor Approval: Y
 - ix. Deputy Approval: 200
 - x. County Code: null
 - xi. EBT: Y
 - xii. Warrant: Y
 - xiii. Direct Deposit: null
- d. Job Skills Training
 - i. Need Category: AW
 - ii. Need Type: 31
 - iii. Program Code: CL, FT, WT, RE
 - iv. Issuance Category: SP
 - v. Max Dollar: 1000
 - vi. Max Quantity: null
 - vii. Period: null
 - viii. Supervisor Approval: Y
 - ix. Deputy Approval: 200
 - x. County Code: null
 - xi. EBT: Y
 - xii. Warrant: Y
 - xiii. Direct Deposit: null
- e. On the Job Experience
 - i. Need Category: AW
 - ii. Need Type: 34
 - iii. Program Code: CL, FT, WT, RE
 - iv. Issuance Category: SP
 - v. Max Dollar: 1000
 - vi. Max Quantity: null
 - vii. Period: null
 - viii. Supervisor Approval: Y
 - ix. Deputy Approval: 200
 - x. County Code: null
 - xi. EBT: null
 - xii. Warrant: Y
 - xiii. Direct Deposit: Y
- f. Placement Assistance
 - i. Need Category: AW
 - ii. Need Type: 29
 - iii. Program Code: CL, FT, WT, RE
 - iv. Issuance Category: SP

- v. Max Dollar: 1000
- vi. Max Quantity: null
- vii. Period: null
- viii. Supervisor Approval: Y
- ix. Deputy Approval: 200
- x. County Code: null
- xi. EBT: Y
- xii. Warrant: Y
- xiii. Direct Deposit: null
- g. Retention Services
 - i. Need Category: AW
 - ii. Need Type: 36
 - iii. Program Code: CL, FT, WT, RE
 - iv. Issuance Category: SP
 - v. Max Dollar: 1000
 - vi. Max Quantity: null
 - vii. Period: null
 - viii. Supervisor Approval: Y
 - ix. Deputy Approval: 200
 - x. County Code: null
 - xi. EBT: Y
 - xii. Warrant: Y
 - xiii. Direct Deposit: null
- h. Limited Disability – Accommodations
 - i. Need Category: LD
 - ii. Need Type: 72
 - iii. Program Code: GM
 - iv. Issuance Category: SP
 - v. Max Dollar: 1000
 - vi. Max Quantity: null
 - vii. Period: null
 - viii. Supervisor Approval: Y
 - ix. Deputy Approval: 200
 - x. County Code: null
 - xi. EBT: Y
 - xii. Warrant: Y
 - xiii. Direct Deposit: null

Note: All code table entries are effective immediately and retroactively (from MIN_DATE to HIGH_DATE).

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1457	<p>Original:</p> <p>The CONTRACTOR shall migrate the value of "DMV Fees/License" in the "Type" dropdown field when the Category of Transportation is selected on the Needs Detail page.</p> <p>Revised:</p> <ol style="list-style-type: none"> 1. The CONTRACTOR shall migrate the value of "DMV Fees/License" in the "Type" dropdown field when the Category of Transportation is selected on the Needs Detail page. 2. The CONTRACTOR shall migrate the following Customer Need Type values for historical purposes in order to display legacy Need Detail records for the C-IV Migration Counties. These values will not be visible on the "Type" dropdown field on the Need Detail page. <ol style="list-style-type: none"> a. SUAS b. Infant Supplemental Rate – State c. Credit Repair/Past Evictions 	<p>This Update will also address the changes requested in DDIDs 1458, 1461, 1462, 1464, 1466, 1467, and 1469.</p>	<p>Updated Customer Need Category code hierarchy with new parent to child relationship of</p> <ol style="list-style-type: none"> 1. "Transportation" to "DMV Fees/License" 2. "Added "SUAS", "Infant Supplemental Rate – State", and "Credit Repair/Past Evictions" Customer Need Types to the System.
1458	<p>The CONTRACTOR shall migrate the value of "Vehicle Services" in the "Type" dropdown field when the Category of Transportation is selected on the Needs List and Needs Detail page.</p>	<p>This Update to add the need type will be made as part of DDID 1457</p>	<p>Updated Customer Need Category code hierarchy with new parent to child relationship of "Transportation" to "Vehicle Services".</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1461	The CONTRACTOR shall migrate the value of "Job Services" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.	This Update to add the need type will be made as part of DDID 1457	Updated Customer Need Category code hierarchy with new parent to child relationship of "Ancillary – Work Related" to "Job Services".
1462	The CONTRACTOR shall migrate the value of "Job Skills Training" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.	This Update to add the need type will be made as part of DDID 1457	Updated Customer Need Category code hierarchy with new parent to child relationship of "Ancillary – Work Related" to "Job Skills Training".
1464	The CONTRACTOR shall migrate the value of "Limited disability-accommodations" in the "Type" dropdown field when the Category of LD Accommodations is selected on the Needs Detail page and the Needs List page.	This Update to add the need type will be made as part of DDID 1457	<ol style="list-style-type: none"> 1. Updated Customer Need Category code hierarchy with new parent to child relationship of "LD Accommodations" to "Limited Disability - Accommodations". 2. Updated Customer Need Category code hierarchy with new parent to child relationship of "LD Accommodations" to "Limited Disability - Accommodations".
1466	The CONTRACTOR shall migrate the value of "On the Job Experience" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.	This Update to add the need type will be made as part of DDID 1457	Updated Customer Need Category code hierarchy with new parent to child relationship of "Ancillary – Work Related" to "On the Job Experience".
1467	The CONTRACTOR shall migrate the value of "Placement Assistance" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.	This Update to add the need type will be made as part of DDID 1457	Updated Customer Need Category code hierarchy with new parent to child relationship of "Ancillary – Work Related" to "Placement Assistance".

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1469	The CONTRACTOR shall migrate the value of "Retention Services" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.	This Update to add the need type will be made as part of DDID 1457	Updated Customer Need Category code hierarchy with new parent to child relationship of "Ancillary – Work Related" to "Retention Services".

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207335 | DDID 1375

EBT 16 Form Header Update

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/2/2019	1.0	Original Draft	Jamie Ng
07/25/2019	1.1	Removed assumption per draft DEL review comment – Form only available in English	Brian Furlong
07/01/2020	1.2	Updates to comply to design standards.	Rainier Dela Cruz
09/29/2020	1.3	Updates per build comments.	Rainier Dela Cruz

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1 OVERVIEW

EBT 16 (Affidavit of Non-Receipt of Cash EBT Benefits) form is completed by the customer to request that their missing Electronic Benefits Transfer (EBT) benefits be replaced.

1.1 Current Design

The header and the first sentence of the EBT 16 form contains 'County of Los Angeles' as a static text.

1.2 Requests

Update the EBT 16 form to dynamically populate the county name.

1.3 Overview of Recommendations

1. Update the EBT 16 form to replace the 'County of Los Angeles' static text with a dynamically populated variable.
2. Update the population logic of the EBT 16 to populate the variable with the name of the county where the case is managed.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Update the EBT 16 Form Header

2.1.1 Overview

The EBT 16 form contains the 'County of Los Angeles' static text. Update the header of the EBT 16 to dynamically populate the county name.

Form Number: EBT 16

Form Name: Affidavit of Non-Receipt of Cash EBT Benefits

Language: English

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

2.1.2 Description of Change

1. Update the EBT 16 form to change 'County of Los Angeles' to 'County of <County Name>', where '<County Name>' is a variable.

The image shows a screenshot of the 'AFFIDAVIT OF NON-RECEIPT OF CASH EBT BENEFITS' form. The title is centered at the top. Below the title, the text 'State of California)' is followed by 'County of <County Name>)'. The 'County of <County Name>' text is highlighted with a red box. Below this, the text reads: 'I, _____, do solemnly declare that my County of <County Name> benefit of \$ _____ which I was entitled to on _____ was not accessed/used by me or any one in my household and that I never received EBT card # _____ or my PIN through the mail.' The 'County of <County Name>' text is again highlighted with a red box. At the bottom, there is a disclaimer: 'I understand I must return any duplicate benefit, and agree that if, at any time, I receive the benefit described above, I will promptly report it to my Eligibility Worker.'

Figure 2.1.2.1 – EBT 16 Form

2. Update the population logic of the EBT 16 form to populate the county name variable. The variable will be populated as follows:

Variable	Description	Population
County Name	The name of the county.	The variable will be populated with the name of the county where the case is managed. If the form is generated in the context of a case, the case number will be used to retrieve the county name. If a blank form is generated, the logic

		will use the logged in user to retrieve the county name.
--	--	--

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	EBT 16 Mockup	EBT16_EN.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1375	The CONTRACTOR shall update the header on the EBT 16 form to dynamically populate the appropriate CONSORTIUM County.	<p>Original:</p> <ul style="list-style-type: none"> - The Form header will be updated to dynamically populate with the County of the logged in User. - It is assumed this form in LRS is only generated in English and Spanish. <p>Revised:</p> <ul style="list-style-type: none"> - The Form header will be updated to dynamically populate with the County of the logged in User. - It is assumed this form in LRS is only generated in English. 	Updated the form header to dynamically populate the name of the county where the case is managed.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207336 | DDID 1373

EBT 17 Form Header Update

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/2/2019	1.0	Original Draft	Jamie Ng
07/25/2019	1.1	Updated per draft DEL review comments. Removed assumptions	Brian Furlong
07/01/2020	1.2	Updates to comply to design standards.	Rainier Dela Cruz
09/29/2020	1.3	Updates per build comments.	Rainier Dela Cruz

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1 OVERVIEW

EBT 17 (Affidavit for Cash Benefits Not Received) form is used when a customer wants to request a replacement of the Electronic Benefits Transfer (EBT) cash benefits due to their EBT card being lost or stolen.

1.1 Current Design

The header of the EBT 17 form contains 'County of Los Angeles' as a static text.

1.2 Requests

Update the header of the EBT 17 form to dynamically populate the county name in the header.

1.3 Overview of Recommendations

1. Update the header of the EBT 17 to replace the 'County of Los Angeles' static text with a dynamically populated variable.
2. Update the population logic of the EBT 17 to populate the variable with the name of the county where the case is managed.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Update the EBT 17 Form Header

2.1.1 Overview

The header of the EBT 17 form contains the 'County of Los Angeles' static text. Update the header of the EBT 17 to dynamically populate the county name in the header.

Form Number: EBT 17

Form Name: Affidavit for Cash Benefits Not Received

Language: English

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

2.1.2 Description of Change

1. Update the EBT 17 form header to change 'County of Los Angeles' to 'County of <County Name>', where '<County Name>' is a variable.

The image shows a screenshot of the 'AFFIDAVIT FOR CASH BENEFITS NOT RECEIVED' form. The title is centered at the top. Below the title, the text reads 'State of California)' followed by 'County of <County Name>)'. The 'County of <County Name>)' text is enclosed in a red rectangular box. Below this, the form contains several lines of text for a declaration, including fields for the date (Month, Day, Year) and time (Time) when the EBT card was lost or stolen, and the name of the worker or agency. There are also paragraphs of legal text at the bottom of the form.

Figure 2.1.2.1 – EBT 17 Form

2. Update the population logic of the EBT 17 form to populate the county name variable. The variable will be populated as follows:

Variable	Description	Population
County Name	The name of the county.	The variable will be populated with the name of the county where the case is managed. If the form is generated in the context of the case, the logic will use the case number to retrieve the county name. If the blank form is generated, if

		will use the logged in user to retrieve the county name.
--	--	--

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	EBT 17 Mockup	EBT17_EN.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1373	The CONTRACTOR shall update the header on the EBT 17 form to dynamically populate the appropriate CONSORTIUM County.	<p>Original:</p> <ul style="list-style-type: none">- The Form header will be updated to dynamically populate with the County of the logged in User.- It is assumed this form in LRS is only generated in English and Spanish. <p>Revised:</p> <ul style="list-style-type: none">- The Form header will be updated to dynamically populate with the County of the logged in User.- It is assumed this form in LRS is only generated in English.	Updated the form header to dynamically populate the name of the county where the case is managed.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207343 | DDID 1371

Updates to EBT Printer Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lalitha Valamarthi
	Reviewed By	Duke Vang, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/24/2019	1.0	Initial Draft	Lalitha Valamarthi
5/29/2019	1.1	Grammatical Updates	Duke Vang
8/11/2020	1.2	Added more details to the recommendations	Duke Vang
9/15/2020	1.3	Added EBT Printer Detail in View Mode as per QA Comments	Duke Vang
9/28/2020	1.4	Updates from DEL comments	Duke Vang

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1 OVERVIEW

1.1 Current Design

The EBT Printer Detail page allows a User with the appropriate rights to add or edit an EBT printer. When editing an EBT printer, Offices can be associated or disassociated with the printer.

The EBT Card Print List page displays EBT Cards to be printed based on a search criterion. The default search criteria are any EBT Card at "Ready to Print" Status for the Office of the logged in User's profile. When selecting an EBT Card to print, the list of available EBT Printers are limited to EBT Printers that are associated to the Office of the logged in User's profile.

The EBT Card Detail page displays the details of an individual EBT Card. When clicking the "Select Printer" button, a new pop-up window displays the EBT Card Print Detail page. The list of available EBT Printers are limited to the EBT Printers that are associated to the Office of the logged in User's profile. When printing an EBT Card from the EBT Card Print Detail page, EBT Card inventory is pulled from the Office of the logged in User's profile.

1.2 Requests

Per Design Differences Identification (DDID) 1371, the following changes will be made to the EBT Printer functionality:

1. Update the EBT Printer Search page to search by Office and County. The default search will be by County.
2. Update the EBT Printer Detail page to capture the County and Physical Office ID of the EBT Printer.

1.3 Overview of Recommendations

1. Modify the EBT Printer Detail page to add a new field for Physical Office ID. The new field will capture the physical office location of the EBT Printer.
2. Modify EBT Printer Search page to search by County and Office.
3. Update EBT Card printing logic to pull inventory from the Physical Office of the EBT Printer if the Physical Office ID is populated for the EBT Printer.

1.4 Assumptions

1. There are non-Los Angeles County EBT Printers already entered in the CalSAWS System. These EBT Printers will not be modified and they will not have a Physical Office ID.
2. There are no security updates.

3. Though there will be page validations to prevent duplicate EBT Printer IDs from being entered, this will not be enforced by the database due to existing duplicate EBT Printers in the System.
4. SCR CA-219129 will be prioritized and implemented post CalSAWS Migration to enforce a Physical Office ID for all EBT Printers entered into the System when all 58 counties have gone live in the CalSAWS System.
5. All C-IV and CalWIN County EBT Printers and Offices will be converted into CalSAWS by the Conversion effort.

2 RECOMMENDATIONS

2.1 EBT Printer Detail

2.1.1 Overview

The EBT Printer Detail page will be updated with new fields to capture the County and Physical Office ID of the EBT Printer.

2.1.2 EBT Printer Detail Page Mockup

EBT Printer Detail



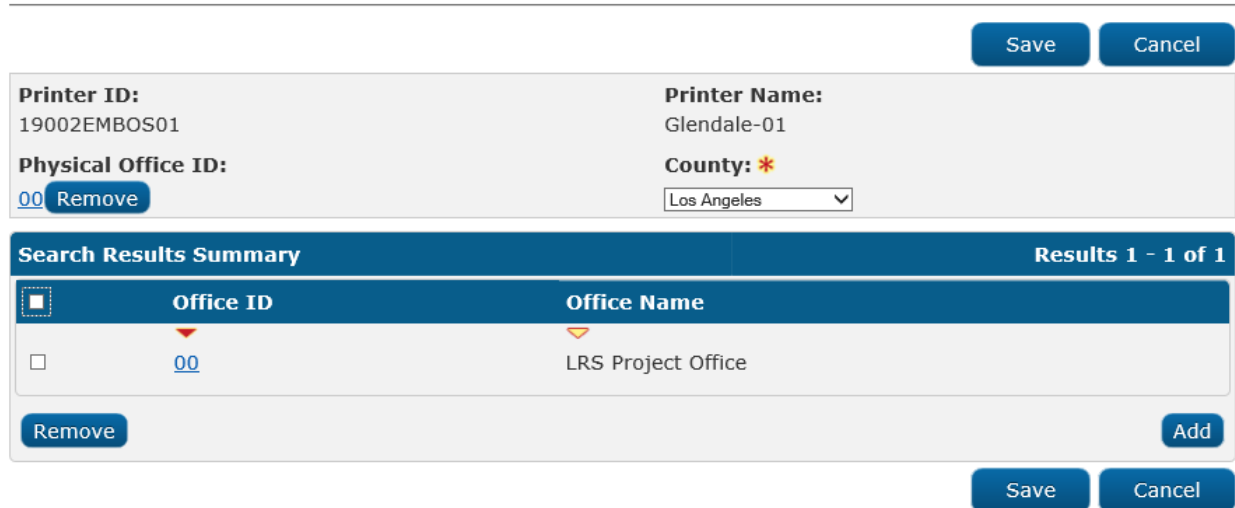
The mockup shows a form for creating a new EBT printer. It includes fields for Printer ID, Printer Name, Physical Office ID, and County. There are 'Add', 'Save', and 'Cancel' buttons.

Printer ID: * Printer Name: *

Physical Office ID: County: *

Figure 2.1.1 – EBT Printer Detail Page in Create Mode

EBT Printer Detail



The mockup shows the EBT printer detail page in edit mode. It includes fields for Printer ID, Printer Name, Physical Office ID, and County. There are 'Remove', 'Add', 'Save', and 'Cancel' buttons. A search results summary table is also present.

Printer ID: 19002EMBOS01 Printer Name: Glendale-01

Physical Office ID: 00 County: *

Search Results Summary Results 1 - 1 of 1

	Office ID	Office Name
<input type="checkbox"/>	00	LRS Project Office

Figure 2.1.2 – EBT Printer Detail Page in Edit Mode

- **Printer ID**- Printer ID already exists. Please enter a unique Printer ID.

Figure 2.1.3 – EBT Printer Detail Page Validation

EBT Printer Detail

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

Printer ID: 19002EMBOS01	Printer Name: Glendale-01
Physical Office ID: 00	County: Los Angeles

Search Results Summary Results 1 - 1 of 1

Office ID	Office Name
00	LRS Project Office

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

Figure 2.1.4 – EBT Printer Detail Page in View Mode

2.1.3 Description of Changes

1. Update the EBT Printer Detail page in Create Mode to display a new non-mandatory field “Physical Office ID” (see Figure 2.1.1). This field will capture the physical location of the EBT Printer within the County.

Note: This field will become a mandatory field with the implementation of CA-219129, once all 58 counties are live in CalSAWS. **Until then, if a Los Angeles County user adds a new Los Angeles County EBT Printer, this field should be filled out so the correct EBT Card inventory can be reduced when printing an EBT Card.**

2. Update the EBT Printer Detail page in Create Mode to display a new mandatory dropdown field for “County” (see Figure 2.1.1). This field will indicate the county that the EBT Printer belongs to. The value will default to the County of the logged in User's profile. The list of possible values will be all 58 Counties in alphabetical order.
3. Update the EBT Printer Detail page in Edit Mode to display a new non-mandatory field “Physical Office ID” (see Figure 2.1.2). This field will capture the physical location of the EBT Printer within the County.
 - a. If the field already has a value, the “Remove” button will display. Clicking on the Physical Office ID value hyperlink will navigate to the Office Detail page for that office.
 - b. If there is no value (i.e., the Remove button was clicked), a “Select” button will display to allow the user to select a new Office ID.
4. Update the EBT Printer Detail page in Edit Mode to display a new mandatory dropdown field for “County” (see Figure 2.1.2). This field will indicate the county that the EBT Printer belongs to. The list of possible values will be all 58 Counties in alphabetical order.

5. Add a new validation to the EBT Printer Detail page when in Create Mode to check for duplicate EBT Printer ID (EBT Printer Number). If an existing EBT Printer ID already exists, display the following validation message (see Figure 2.1.3):
 - a. "Printer ID – Printer ID already exists. Please enter a unique Printer ID."

Technical Note: There will be no database constraint on the EBT Printer ID until CA-219129 is implemented. There is a chance that between now and the release of this SCR that new duplicate EBT Printers could be added to the System. Adding a database constraint to the EBT Printer ID while there are duplicates may cause an error with the database deploy for the release.

2.1.4 EBT Card Print Detail – Element Table

Element	Type	Default	Comments/Logic
Button – Select	Button	N/A	Button will navigate the user to the Select Office page to search and select an Office ID
Button – Remove (Under Physical Office ID)	Button	N/A	Button will remove the current Office ID value for the Physical Office ID field
Dropdown – County	Dropdown	County of the logged in user's profile	The county that owns the EBT Printer

2.1.5 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Printer Search**

2.1.6 Security Updates

N/A

2.1.7 Page Mappings

Create page mappings for the EBT Printer Detail page.

2.1.8 Page Usage/Data Volume Impacts

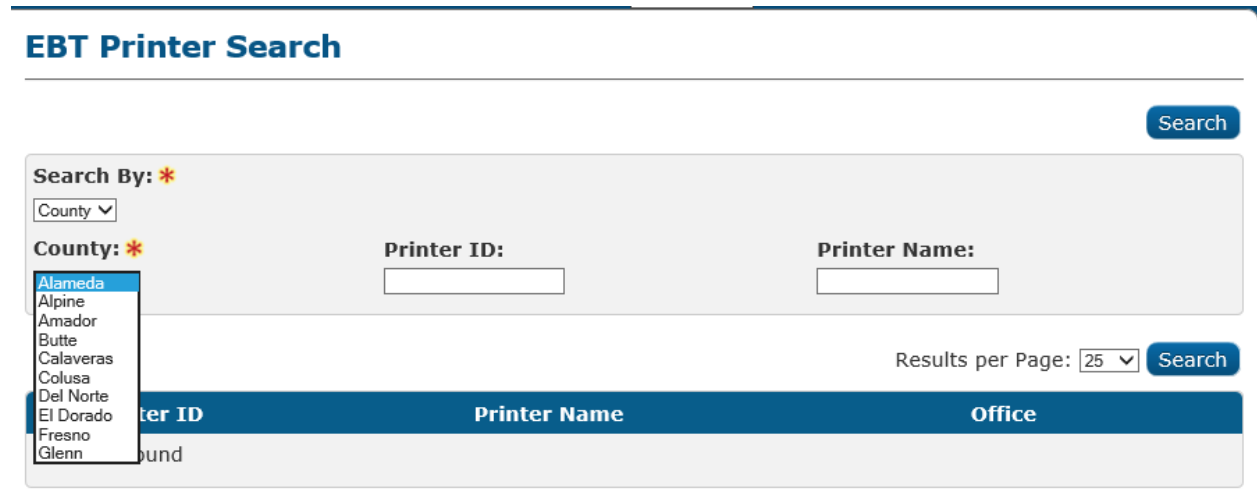
N/A

2.2 EBT Printer Search

2.2.1 Overview

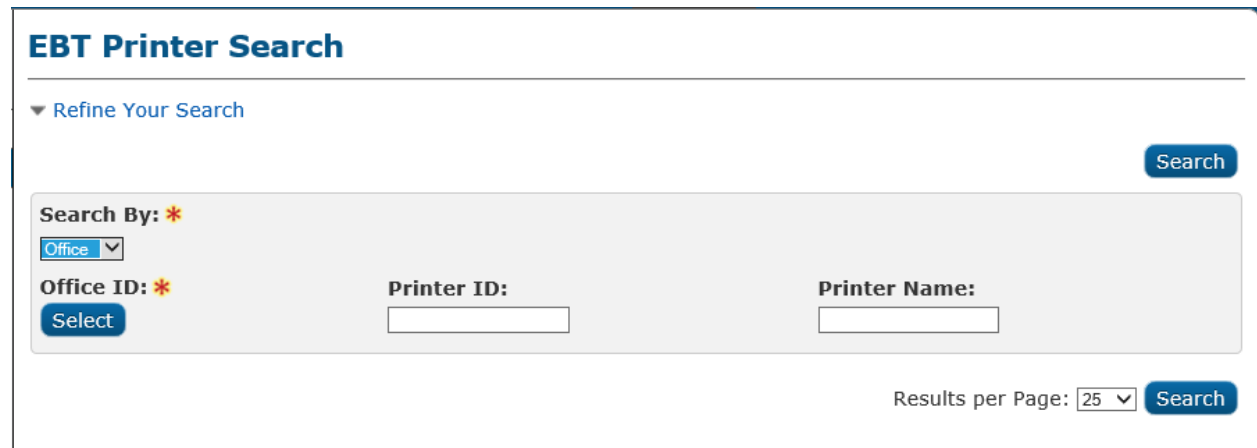
The EBT Printer Search page will be updated to allow users to search EBT Printers by Office and County.

2.2.2 EBT Printer Search Mockup



The mockup shows a search interface titled "EBT Printer Search". At the top right is a "Search" button. Below the title is a "Search By:" section with a "County" dropdown menu. A "County:" dropdown menu is open, showing a list of counties: Alameda, Alpine, Amador, Butte, Calaveras, Colusa, Del Norte, El Dorado, Fresno, and Glenn. To the right of the county dropdown are two input fields: "Printer ID:" and "Printer Name:". Below these fields is a "Results per Page:" dropdown menu set to "25" and a "Search" button. At the bottom, a table header is visible with columns: "Printer ID", "Printer Name", and "Office".

Figure 2.2.1 – EBT Printer Search by County



The mockup shows a search interface titled "EBT Printer Search". At the top left is a "Refine Your Search" dropdown menu. At the top right is a "Search" button. Below the title is a "Search By:" section with an "Office" dropdown menu. To the left of the office dropdown is a "Select" button. To the right of the office dropdown are two input fields: "Printer ID:" and "Printer Name:". Below these fields is a "Results per Page:" dropdown menu set to "25" and a "Search" button.

Figure 2.2.2 – EBT Printer Search by Office

2.2.3 Description of Change

1. Update the Organization Level category (CT 1819) with a new EBT Printer Search reference column. This reference column will be used to

indicate what organization level searches can be performed on the EBT Printer Search page.

2. Update the Organization Level codes table (CT 1819) with the following reference column updates.

Code	Organization Level	EBT Printer Search
CO	County	Y
DS	District	N
DV	Division	N
OF	Office	Y
RG	Region	N
UN	Unit	N
WO	Worker	N

Note: All updates will be effective retroactively and for the future (MIN_DATE to HIGH_DATE).

3. Update the EBT Printer Search page with a new "Search By" dropdown field. The "Search By" dropdown field will be mandatory and will be populated by the Organization Level category (CT 1819) where the EBT Printer Search indicator reference column is set to "Y". The default Search By will be County (See Figure 2.2.1).
 - a. When County is selected as the "Search By", the following fields will dynamically appear (See Figure 2.2.1):
 - i. County – This will be a mandatory dropdown field containing all Counties that have a valid go-live date under the County category (CT 15). This field will default to the County of the logged in user. This value will be used to search against all EBT Printers belonging to the County value.
 - ii. Printer ID – This will be an optional text field. This value will be used to search against the Printer Number within the selected County. The matching criteria will be a case insensitive "wild card" match where any results with a matching substring of the search value will be returned. For example, if the search value is "01", the following Printer ID results will be returned: "01PRINTEREAST", "PRIMARY001PRINTER", and "PRINTERMAIN101".
 - iii. Printer Name – This will be an optional text field. This value will be used to search against the Printer Name within the selected County. The matching criteria will be a case insensitive "wild card" match where any results with a matching substring of the search value will be returned. For example, if the search value is "Sacramento", the following Printer Name results will be returned: "Sacramento Printer - Downtown", "Main Sacramento Printer", and "County Printer Sacramento".

- b. When Office is selected as the "Search By", the following fields will dynamically appear (See Figure 2.2.2):
 - i. Office ID – This will be a mandatory field. The field will contain a "Select" button to call the existing Select Office page framework. This field will be used to search against all EBT Printers that are associated to the Office value.
 - ii. Printer ID – This will be an optional text field. This value will be used to search against the Printer Number within the selected County. The matching criteria will be a case insensitive "wild card" match where any results with a matching substring of the search value will be returned. For example, if the search value is "01", the following Printer ID results will be returned: "01PRINTEREAST", "PRIMARY001PRINTER", and "PRINTERMAIN101".
 - iii. Printer Name – This will be an optional text field. This value will be used to search against the Printer Name within the selected County. The matching criteria will be a case insensitive "wild card" match where any results with a matching substring of the search value will be returned. For example, if the search value is "Sacramento", the following Printer Name results will be returned: "Sacramento Printer - Downtown", "Main Sacramento Printer", and "County Printer Sacramento".

2.2.4 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Printer Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mappings to the EBT Printer Search page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 EBT Card Print Detail

2.3.1 Overview

Update the EBT Card Print Detail page to reduce the EBT Card inventory from the Physical Office ID of the EBT Printer when printing an EBT card.

2.3.2 EBT Card Detail Page Mockup

N/A – No page changes

2.3.3 Description of Changes

1. Update “Print” button on the EBT Card Print Detail page to reduce the EBT Card inventory from the Physical Office ID of the selected EBT Printer when printing an EBT Card.
 - a. If the selected EBT Printer is an external printer (i.e. there is no Physical Office ID), no EBT Card inventory will be reduced.

2.3.4 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Card Print List**

2.3.5 Page Mappings

N/A

2.3.6 Counties Impacted

All Counties.

2.4 Database Change Request (DBCR)

2.4.1 Overview

Update the CalSAWS System so that all new and existing EBT Printers can be associated to a County and have a physical office location.

2.4.2 Description of Changes

1. Create a DBCR for the EBT_PRNTR table to make the following updates:
 - a. Add a new non-nullable County Code column to allow EBT Printers to be associated a County.
 - b. Add a new nullable Physical Office ID column to indicate the physical location of the EBT Printer.

2.5 Data Change Request (DCR)

2.5.1 Overview

All existing Los Angeles County EBT Printers will be associated to Los Angeles County and a Physical Office ID.

2.5.2 Description of Changes

1. Associate all Los Angeles County EBT Printers listed under Appendix 1 to Los Angeles County and associate each EBT Printer to the Physical Location Offices from Appendix 1.

Note: Los Angeles County was notified of erroneous and duplicate EBT Printers in the System. They have since updated and removed these EBT Printers from the System. The EBT Printers listed under Appendix 1 are the current and confirmed EBT Printer inventory in Los Angeles County as of 8/25/2020 that will be modified with this data change.

2. Associate all Los Angeles County EBT Printers that are not listed on Appendix 1 to Los Angeles County and associate the EBT Printer's Physical Location Office to the first office association of the EBT Printer. If there are no office associations, the Physical Location Office will be null (blank).

Note: This data change is to capture any new Los Angeles County EBT Printers that were added between 8/25/2020 and the release of this DDID.

3. Associate all Non-Los Angeles County EBT Printers to their respective County. The County will be identified by the first two characters of the Printer Number. For example: 24 will be Merced, 36 will be San Bernardino, etc. The Physical Location Office for these EBT Printers will be null since the Non-Los Angeles County Offices do not exist in the System.

2.5.3 Estimated Number of Records Impacted/Performance

Los Angeles County EBT Printers to be updated: ~74

Non-Los Angeles County EBT Printers to be updated: ~295

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1371	<p>Original:</p> <ol style="list-style-type: none"> The CONTRACTOR shall update the EBT Card Print List page to display all EBT Printers within a CONSORTIUM County by default. The CONTRACTOR shall associate all EBT Printers within a CONSORTIUM County to all offices within that CONSORTIUM County for the 58 Counties. <p>Revision:</p> <p>The CONTRACTOR shall make the following updates to the EBT Printer functionality:</p> <ol style="list-style-type: none"> Update the EBT Printer Search page to display all EBT Printers within a CONSORTIUM County by default. Update the EBT Printer Detail page to capture the County Code and Physical Office ID. 	N/A	<ol style="list-style-type: none"> Updated EBT Printer Detail page with a new non-mandatory field for Physical Office ID and a new mandatory field for County. Updated the EBT Printer Search page to allow searching for EBT Printers by Office or County. Updated EBT Card Printing logic to pull inventory from the Physical Office inventory if there is a physical office defined.

4 APPENDIX

1. Los Angeles County EBT Printers as of 8/25/2020:

Printer Number	Printer Name	Physical Location Office Name	Office Number
19002EMBOS01	Glendale-01	002 Glendale	02
19002EMBOS02	Glendale-02	002 Glendale	02
19003EMBOS01	Pasadena-01	003 Pasadena	03
19003EMBOS02	Pasadena-02	003 Pasadena	03
19004EMBOS01	El Monte-01	004 El Monte (San Gab. V. Serv. Center)	04
19004EMBOS02	El Monte-02	004 El Monte (San Gab. V. Serv. Center)	04
19005EMBOS01	Belvedere-01	005 Belvedere	05
19005EMBOS02	Belvedere-02	005 Belvedere	05
19006EMBOS01	Cudahy-01	006 Cudahy	06
19006EMBOS02	Cudahy-02	006 Cudahy	06
19007EMBOS01	South Special-01	007 South Special	07
19007EMBOS02	South Special-02	007 South Special	07
19008EMBOS01	Southwest Special-01	008 Southwest Special	08
19008EMBOS02	Southwest Special-02	008 Southwest Special	08
19008EMBOS03	Southwest Special-03	008 Southwest Special	08
19008EMBOS04	Southwest Special-04	008 Southwest Special	08
19010EMBOS01	Wilshire Special-01	010 Wilshire Special Office	10
19010EMBOS02	Wilshire Special-02	010 Wilshire Special Office	10
19011EMBOS01	East Valley-01	011 East Valley	11
19011EMBOS02	East Valley-02	011 East Valley	11
19012EMBOS01	Exposition Park-01	012 Exposition Park Family Service Center	12
19012EMBOS02	Exposition Park-02	012 Exposition Park Family Service Center	12
19013EMBOS01	Metro Family-01	013 Metro Family	13
19013EMBOS02	Metro Family-02	013 Metro Family	13

19014EMBOS01	Civic Center-01	014 Civic Center	14
19014EMBOS02	Civic Center-02	014 Civic Center	14
19015EMBOS01	Metro East-01	015 Metro East	15
19015EMBOS02	Metro East-02	015 Metro East	15
19016EMBOS01	Medi-Cal Outreach District-01	016 Child Medi-Cal Enroll. Project	16
19016EMBOS02	Medi-Cal Outreach District-02	016 Child Medi-Cal Enroll. Project	16
19017EMBOS01	Florence-01	017 Florence	17
19017EMBOS02	Florence-02	017 Florence	17
19020EMBOS01	San Gabriel Valley-01	020 San Gabriel Valley	20
19020EMBOS02	San Gabriel Valley-02	020 San Gabriel Valley	20
19026EMBOS01	Compton-01	026 Compton	26
19026EMBOS02	Compton-02	026 Compton	26
19027EMBOS01	South Central-01	027 South Central	27
19027EMBOS02	South Central-02	027 South Central	27
19031EMBOS01	South Family-01	031 South Family	31
19031EMBOS02	South Family-02	031 South Family	31
19032EMBOS01	San Fernando-01	032 San Fernando Branch	32
19032EMBOS02	San Fernando-02	032 San Fernando Branch	32
19034EMBOS01	Lancaster-01	034 Lancaster	34
19034EMBOS02	Lancaster-02	034 Lancaster	34
19036EMBOS01	Pomona-01	036 Pomona	36
19036EMBOS02	Pomona-02	036 Pomona	36
19038EMBOS01	Metro North-01	038 Metro North Office	38
19038EMBOS02	Metro North-02	038 Metro North Office	38
19040EMBOS01	Norwalk-01	040 Norwalk	40
19040EMBOS02	Norwalk-02	040 Norwalk	40
19051EMBOS01	San Clarita-01	051 Santa Clarita Branch	51
19051EMBOS02	San Clarita-02	051 Santa Clarita Branch	51
19060EMBOS01	Rancho Park-01	060 Rancho Park	60
19060EMBOS02	Rancho Park-02	060 Rancho Park	60

19062EMBOS01	Paramount-01	062 Paramount Office	62
19062EMBOS02	Paramount-02	062 Paramount Office	62
19066EMBOS01	Lincoln Heights-01	066 Lincoln Heights	66
19066EMBOS02	Lincoln Heights-02	066 Lincoln Heights	66
19067EMBOS01	GR Lancaster-01	067 Lancaster General Relief Office	67
19067EMBOS02	GR Lancaster-02	067 Lancaster General Relief Office	67
19070EMBOS01	Metro Special-01	070 Metro Special Office	70
19070EMBOS02	Metro Special-02	070 Metro Special Office	70
19070EMBOS03	Metro Special-03	070 Metro Special Office	70
19070EMBOS04	Metro Special-04	070 Metro Special Office	70
19082EMBOS01	West Valley-01	082 West Valley	82
19082EMBOS02	West Valley-02	082 West Valley	82
19083EMBOS01	Southwest Family-01	083 Southwest Family	83
19083EMBOS02	Southwest Family-02	083 Southwest Family	83
19099EMBOS01	FS/MC Mbl Outreach Unit-01	LRS Project Office	00
19099EMBOS02	FS/MC Mbl Outreach Unit-02	LRS Project Office	00
19326EMBOS01	Men's Central Jail-01	LRS Project Office	00
19393EMBOS01	DPSS Academy-01	LRS Project Office	00
19393EMBOS02	DPSS Academy-02	LRS Project Office	00
19600EMBOS01	LEADER Project-01	LRS Project Office	00

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-207362 | DDID 1237

Update MC RE Outbound Reminder Call to be
an Outbound Text Message for Migration
Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/25/2020	1.0	Initial Draft	Michael Barillas
9/1/2020	1.1	Updated recommendations	Avi Bandaranayake
9/16/2020	1.2	Updated based on QA feedback	Amy Gill
9/24/2020	1.3	Updated Text message	Avi Bandaranayake
10/08/2020	1.4	Updated English Message, Added Spanish Message	Michael Barillas

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1 OVERVIEW

Medi-Cal Redetermination Reminder is currently an outbound call campaign. As part of the CalSAWS migration effort, the Medi-Cal Redetermination Reminder will be converted into a Text Campaign for the 57 Migration Counties.

1.1 Current Design

Campaign 206 Medi-Cal Redetermination Reminder is a Los Angeles County outbound call campaign.

1.2 Requests

Convert Campaign 206 Medi-Cal Redetermination Reminder Call Campaign into a Text Campaign for the 57 Migration Counties.

1.3 Overview of Recommendations

1. Add a new entry into Automated Actions for a new Text message.
2. Create a new Batch sweep and Batch Job for new Text message 'Medi-Cal Redetermination Reminder'.

1.4 Assumptions

1. Automated Actions and text messaging framework will be implemented with CA-207106 in the same release to support turning text messages on and off.
2. CA-207643 will add a new texting service that will be used by the CalSAWS system.
3. Text messages will only be sent in English and Spanish, using English characters. Not all phones may support Spanish or other language characters and using them may result in texts with illegible characters.
4. The new text message will be available to all 58 counties via Automated Actions. It will default to active for the 57 Migration counties, default to inactive for L.A. County.

2 RECOMMENDATIONS

Medi-Cal Redetermination Reminder is currently an outbound call campaign. As part of the CalSAWS migration effort, the Medi-Cal Redetermination Reminder will be converted into a Text Campaign for the 57 Migration Counties.

2.1 Add new Text to Automated Actions Page

2.1.1 Overview

Add a new Text message entry to Automated Actions.

2.1.2 Page Mockup

N/A – no page change

2.1.3 Description of Change

Add a new Automated Action of Type 'Text Outreach' with the following information.

Name: MC Redetermination Form Not Received

Program: MC

Run Date: Batch (Mon-Fri) 1 week before the MC RE Discontinuance Batch job.

Scenario: An MC Redetermination Packet was not received.

Message Text (English):

CalSAWS: We did not get your Medi-Cal Redetermination Packet. Please call <Phone number> so your benefits don't stop.

Message Text (Spanish):

CalSAWS: No recibimos su redeterminacion de Medi-Cal. Llame al <Phone Number> para que sus beneficios no finalicen.

Status: Set the status to Inactive for Los Angeles County and Active for all other counties.

2.1.4 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Add new Batch Sweep and Batch Job

2.2.1 Overview

A new Batch sweep and Batch job will be created to gather the target population and send a Text message for the Medi-Cal Redetermination Reminder.

2.2.2 Description of Change

1. Text messages will be sent for a County only if they have an Active status as indicated on the Automated Actions Page.
2. Text messages will be sent in Spanish if the person's Written Language preference is 'Spanish', otherwise send the text message in English for all other written languages.
3. For text messages that have a <Phone Number> parameter in the message, use the number below based on the County of the customer's case:
 - a. Use (866) 613-3777 if the customer is in Los Angeles County.
 - b. Use (844) 859-2100 for all other counties.
4. Target Population: The text message will be sent to customers that will be discontinued as part of the MC Discontinuance Batch job and were mailed one of the following MC Redetermination packets:
 - a. MAGI MC Packet
 - b. Mixed MC RE Packet
 - c. LTC MC RE Packet
 - d. MC 604 IPS Packet
 - e. MC RE Packet
 - f. MSP Packet
 - g. MC RE Pre-ACA Packet

The text will be sent in the same month that the program will be discontinued.

2.2.3 Execution Frequency

Monthly – End of the Month (1 week before the MC RE Discontinuance Batch job)

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

All Counties

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

No change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1237	The CONTRACTOR shall update the automatic outbound call that occurs in LRS on the 18th of the RE Due Month to be an outbound text message for the 57 Counties. The Text message will only be sent to those recipients that have opted into Text messaging and have signed the waiver.	Original: The Batch properties and scheduling will have to be updated for each wave separately. Revised:	Added new Text message to automated actions and setup new message batch sweep and processing job.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207403 | DDID 1026

Update the Automatic Case Flags for the 58
Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Avinda Bandaranayake, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/21/2020	1.0	Initial Revision	Vallari Bathala
9/25/2020	1.1	Added section 2.2 for data change.	Avi Bandaranayake

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1 OVERVIEW

This DDID covers changes to update the batch jobs for Specialized Supportive Services and Minor Consent automatic case flags to default to run for all 58 counties.

1.1 Current Design

The Add Flag Specialized Supportive Services batch job, PB19S902, adds the Specialized Supportive Services flag to the case for Welfare-to-Work (WTW), Refugee Employment Program (REP) and Cal-Learn (CL) programs and when the participant answers yes to any of the following on the Specialized Supportive Services Detail page: Domestic Violence, Mental Health, or Substance Abuse.

The Clear Flag Specialized Supportive Services batch job, PB19S903, clears the flag by deleting the record associated to the Specialized Supportive Services flag when the Specialized Supportive Services record end date has been reached.

The Add Flag Minor Consent batch job, PB19S908, adds the Minor Consent flag to a case when a Medi-Cal program with a Minor Consent Requested Medi-Cal Type is made Active.

The Clear Flag Minor Consent batch job, PB19S909, clears the case flag by deleting the record associated to the Minor Consent flag when the Minor Consent Medi-Cal program has been discontinued.

1.2 Requests

Update batch jobs PB19S902, PB19S903, PB19S908, PB19S909 to default to run for all counties.

1.3 Overview of Recommendations

1. Make the Specialized Supportive Services and Minor Consent automatic case flags available to all Counties.
2. Rename batch jobs to be "00" jobs.
3. Create new Batch Property Change Requests (BPCR) to add counties to the County Code List.
4. Update the batch job to run for the counties in the list.

1.4 Assumptions

1. These batch jobs currently run for only Los Angeles County (County 19). There is no change to existing Los Angeles County functionality.
2. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2 RECOMMENDATIONS

2.1 Specialized Supportive Services and Minor Consent Automatic Case Flags Batch Jobs

2.1.1 Overview

Update the Specialized Supportive Services and Minor Consent automatic case flag batch jobs to use a county parameter list so that the batch job can run for multiple counties.

2.1.2 Description of Change

1. Create BPCRs to update the CountyCodeList property to include all 58 counties for each of the following batch jobs:
 - a. PB19S902
 - b. PB19S903
 - c. PB19S908
 - d. PB19S909
2. Modify all job names to be '00' jobs.
3. Modify all jobs to assign the appropriate flag to the appropriate county.

2.1.3 Execution Frequency

No change.

2.1.4 Key Scheduling Dependencies

No change.

2.1.5 Counties Impacted

All counties.

2.1.6 Data Volume/Performance

Unknown.

2.1.7 Failure Procedure/Operational Instructions

No change.

2.2 Data Change

2.2.1 Overview

Currently all flags in the system are only associated to County 19.

2.2.2 Description of Change

Create a DCR to add Specialized Supportive Services and Minor Consent flags for all 57 migration counties.

2.2.3 Estimated Number of Records Impacted/Performance

Adding 114 records.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1026	<p>Original: The CONTRACTOR shall update the Automatic Case Flags for the 58 Counties as follows: 1) Default the Specialized Supportive Services and Minor Consent Automatic Case Flags to "On" 2) Default the following Automatic Case Flags to "Off": a) Open Fraud Investigation b) Direct Rent c) Enhance SSIMAP d) Housing Subsidy</p> <p>Revised: The CONTRACTOR shall update the Automatic Case Flags for the 58 Counties to default the Specialized Supportive Services and Minor Consent Automatic Case Flags to "On".</p>	N/A	<ol style="list-style-type: none"> 1. Make the Specialized Supportive Services and Minor Consent automatic case flags available to all Counties. 2. Rename batch jobs to be "00" jobs. 3. Create new Batch Property Change Requests (BPCR) to add counties to the County Code List. 4. Update the batch job to run for the counties in the list. 5. No system change is needed to default the following Case Flags to "off" as these jobs will only run for Los Angeles County. <ol style="list-style-type: none"> a. Open Fraud Investigation b. Direct Rent c. Enhance SSIMAP d. Housing Subsidy

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207411 | DDID 1003 & 1609

Migrate C-IV Districts and Regions to the Office
Detail page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Philip McGinty
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/20/2020	1.0	Original Document	Philip McGinty

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1 OVERVIEW

1.1 Current Design

The Office Detail page allows the user to add an Office and select the appropriate District and Region based on the Office's County.

Currently LRS/CalSAWS only has Los Angeles County-specific Districts and Regions on the Office Detail page. The 39 C-IV Counties do not have their specific Regions and Districts in the applicable code tables within the LRS/CalSAWS.

1.2 Requests

1. Migrate the 39 C-IV County specific Districts to the Office Detail page and only display those Districts that apply to each Consortium County.
2. Migrate the 39 C-IV County specific Regions to the Office Detail page and only display those Regions that apply to each Consortium County.

1.3 Overview of Recommendations

1. Make CTCR updates to include all 39 C-IV County specific Districts on the Office Detail page.
2. Make CTCR updates to include all 39 C-IV County specific Regions on the Office Detail page.

1.4 Assumptions

1. CalWIN counties will be added with SCR CA-218788.

2 RECOMMENDATIONS

2.1 Office Detail

2.1.1 Overview

CTCR updates to include all the 39 C-IV counties specific Districts and Regions on the Office Detail page.

2.1.2 Mockup

N/A – No page change

2.1.3 Description of Changes

1. Update the codes table for the “Region” field to include the specific Regions for the applicable C-IV Counties.
 - a. The list of regions is included in the following Supporting Document:
 - i. CIV_Districts_Regions.xlsx
2. Update the codes table for the “District” field to include the specific Districts for the applicable C-IV Counties.
 - a. The list of this districts is included in the following Supporting Document:
 - i. CIV_Districts_Regions.xlsx

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	Spreadsheet of all C-IV Counties Districts and Regions to be migrated.	CIV_Districts_Regions.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1003	<p>Original: The CONTRACTOR shall migrate the 58 County specific Districts on the Office Detail page and only display those Districts that apply to each CONSORTIUM County.</p> <p>Revised: The CONTRACTOR shall migrate the 57 County specific Districts on the Office Detail page and only display those Districts that apply to each CONSORTIUM County.</p>		CTCR updated to include the Districts for the 39 C-IV Counties. CalWIN Counties will be added in a subsequent release with SCR CA-218788.
1609	<p>Original: The CONTRACTOR shall migrate the 58 County specific Regions in the Region dropdown on the Office Detail page and update the Region dropdown field to only display those Regions that apply to each CONSORTIUM County.</p> <p>Revised: The CONTRACTOR shall migrate the 57 County specific Regions in the Region dropdown on the Office Detail page and update the Region dropdown field to only display those Regions that apply to each CONSORTIUM County.</p>		CTCR updated to include the Regions for the 39 C-IV Counties. CalWIN Counties will be added in a subsequent release with SCR CA-218788.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207423 DDID 713

Update Automated Regression Test (ART) scripts
to account for CalSAWS Migration R8 system
modifications

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/10/2020	1.0	Original	William Baretsky

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1 OVERVIEW

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

Update the ART scripts to account for the system modifications being made as part of the CalSAWS Migration R8 release. Update the underlying framework code modules used by the ART scripts as needed to support these changes.

1.4 Assumptions

1. No technical enhancements to the ART framework are required for CalSAWS R8.
2. The functional scope of the ART suite and each ART script will remain unchanged.
3. No more than 70% of the ART scripts will need to be updated.
4. No more than 30% of the ART framework code modules will need to be updated.

2 RECOMMENDATIONS

2.1 CalSAWS System Change Scope

2.1.1 Description of Changes

Update the ART scripts and underlying code modules to account for the system modifications being made under each of the following R8 SCRs:

SCR #	Summary
201516	DDID 1967: DDCR 5507: Update to Non-Payment of Premium (NPP) file handling
206874	DDID 1967: Add Discrepancy Type to Investigation Result Detail page
207106	DDID 2305, 2306, 2307 - Update Text Messaging Solution for all 58 Counties
207108	DDID 2302 - Updates to Standardized Bar Codes
207113	DDID 2279: Update texting to allow an emergency text message
207159	DDID 2126 - Updates to OP/OI Notices
207165	DDID 2117 - Updates to Manual EDBC for FC, AAP, KG
207166	DDID 2116 - Update Child Placement Detail page for Non-Related Legal Guardians
207303	DDID 1526 - Display Customer Appointments on User Outlook Calendars
207309	DDID 1490 - Update to Referral Form
207320	DDID 1457, 1458, 1461, 1462, 1464, 1466, 1467, and 1469 - Updates to Customer Need Category and Customer Need Category Type Hierarchy
207335	DDID 1375 - EBT 16 Form Header Update
207336	DDID 1373: EBT 17 Form Header Update
207343	DDID 1371 - Updates to EBT Printer Functionality
207362	DDID 1237 - Update MC RE Outbound Reminder Call to be an Outbound Text Message for Migration Counties
207366	DDID 1233 - Add MAGI Referral Assignments page to assign Referrals to Migration County Offices
207395	DDID 1041, DDID 1045, DDID 1046 - Updates to State forms
207403	DDID 1026 - Update the Automatic Case Flags for the 58 Counties
207411	DDID 1003, DDID 1609 - Migrate C-IV Districts and Regions to the Office Detail page
207425	DDID 706 WTW 31 Data Population Updates

SCR #	Summary
207438	DDID 571 - Migrate C-IV WDTIP Inbound Jobs
207451	DDID 452: Update CW 2200 - Request for Verification
207453	DDID 428 - PA 2327 Wording Update
207476	DDID 266 - Update No Change SAR 7 functionality to be configurable
208568	DDID 1967: Modify WTW Batch jobs related to Sanctions to allow Counties to opt in/opt out
208569	DDID 1967: Non-Compliance updates to handle converted data
208784	DDID 1967: Update Position Detail to no longer have Section as a required field
214148	DDID 1967: Migrate/Align Skip Issuance Scenarios Between CalSAWS and Migration Counties
215430	DDID 1967: Update the Sponsorship Detail page to display legacy Sponsor names
216086	DDID 1062 - Updates to CMSP Denial and Discontinuance NOAs
216162	DDID 1967, DDID 1955: Updates to Automated Tasks for MEDS Alerts
216321	DDID 1395 - Update NHR, PVS and IFDS reader jobs to process files from all 57 counties
216568	DDID 1787, DDID 1789 - Migrate the C-IV County Specific Batch Jobs (Phase 5)
217839	DDID 1991 - Display CalSAWS name throughout the system
217984	DDID 1967: Add L9 Aid Code for Converted EDBC records
218540	DDID 1967: Add WINS Hours Verification Type for historical C-IV Converted records

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
713	<p>The CONTRACTOR shall review and update the C-IV and LRS suite of Automated Regression Test (ART) scripts as required to account for the system modifications being made as part of the CalSAWS Migration. A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized and run automatically on an agreed upon frequency against the CalSAWS Software.</p> <p>The CONTRACTOR shall update the ART framework to support all browser versions supported by the CalSAWS Software.</p>	N/A	<p>Update the ART scripts to account for the system modifications being made under the CalSAWS Migration R8 SCRs.</p> <p>Update the ART framework code modules as needed to support the ART script changes mentioned above.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207425 | DDID 706

WTW 31 Data Population Updates

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/1/2019	1.0	Original Draft	Jamie Ng
07/25/2019	1.1	Updates per draft DEL review – fixed spelling of “impact” on page 4	Brian Furlong
07/02/2020	1.2	Updates to comply to design standards	Rainier Dela Cruz
08/25/2020	1.3	Updates to add additional field population.	Rainier Dela Cruz
09/10/2020	1.4	Updates per QA comments	Rainier Dela Cruz
09/28/2020	1.5	Updates per deliverable comments	Rainier Dela Cruz
10/20/2020	1.6	Added a design clarification on the population of the Legal Aid address and phone number to align is current system functionality	Rainier Dela Cruz

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1 OVERVIEW

The WTW 31 (Request to Meet Welfare-to-Work Rules to Get My Cash Aid Back) form is used by the customer to request an end to a Welfare-to-Work (WTW) sanction.

1.1 Current Design

The header of WTW 31 form contains 'County of Los Angeles' as a static text. The following fields are not populated: the field after 'call the county at:', the WTW worker name, the State Welfare Rights Organization and Legal Aid office addresses and phone numbers.

1.2 Requests

Update the header of the WTW 31 form to dynamically populate the county name in the header and populate the field after 'call the county at:', the WTW worker name, the State Welfare Rights Organization and Legal Aid office addresses and phone numbers.

1.3 Overview of Recommendations

1. Update header of the WTW 31 form to replace the 'County of Los Angeles' static text with a dynamically populated variable and populate it with the name of the county where the case is managed.
2. Update the WTW 31 form population logic to populate the field after 'call the county at:', the WTW worker name, the State Welfare Rights Organization and Legal Aid office addresses and phone numbers.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 WTW 31 Form Updates

2.1.1 Overview

The header of WTW 31 form contains 'County of Los Angeles' as a static text. It also has a field after 'Call the county at:' that is not populated. Update the header of the WTW 31 form to dynamically populate the county name in the header and populate the field after 'call the county at:' with the worker's phone number.

Form Number: WTW 31

Form Name: Request to Meet Welfare-to-Work Rules to Get My Cash Aid Back

Language: English, Spanish, Armenian, Cambodian, Chinese*, Filipino/Tagalog, Korean, Vietnamese

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

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

2.1.2 Description of Change

1. Update header of the WTW 31 form to replace the 'County of Los Angeles' static text with a dynamically populated variable and populate it with the name of the county where the case is managed.
 - a. Update form header to change 'County of Los Angeles' to 'County of <County Name>', where '<County Name>' is a variable.

The mockup shows the header of the WTW 31 form. On the left, it says 'STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY' and 'REQUEST TO MEET WELFARE-TO-WORK RULES TO GET MY CASH AID BACK'. On the right, it says 'CALIFORNIA DEPARTMENT OF SOCIAL SERVICES' and 'COUNTY OF <CountyName>'. Below this, there are fields for 'Date:', 'Case Name:', 'Case Number:', 'Worker Name:', 'Worker ID:', 'Worker Phone Number:', and 'Customer ID:'.

Figure 2.1.2.1 – WTW 31 Header

- b. Update the population logic to populate the county name variable. The variable will be populated as follows:

Variable	Description	Population
CountyName	The name of the county.	The variable will be populated with the name of the county where the case is managed.

2. Update the WTW 31 form population logic.

INSTRUCTIONS TO THE CLIENT: Your family gets less cash aid because you did not meet Welfare-to-Work rules. If you want your cash aid back, you can fill out this form and return it to your Welfare-to-Work worker right away.

Instead of filling out this form and mailing it to your Welfare-to-Work worker, you can also call your worker to tell him or her that you want your cash aid back. If you do not know your worker's address or telephone number, call the county at: <CountyContactNumber>.

Figure 2.1.2.2 – WTW 31 Office Phone Number Field

CASE # OR SOCIAL SECURITY #:	PHONE #: ()	DATE:
WELFARE TO WORK WORKER'S NAME (PLEASE PRINT): <WTWWorkerName>		
DO YOU NEED FREE LEGAL HELP?		
You can get free legal help with this matter from the following:		
State Welfare Rights Organization	Local Legal Aid Office	
<StateWelfareRightsOrganizationAddress>	<LegalAidAddress>	
Phone # <StateWelfareRightsOrganizationPhoneNumber>	Phone #: <LegalAidPhoneNumber>	

Figure 2.1.2.2 – WTW 31 Field Population

a. The variables will be populated as follows:

Variable	Description	Population
CountyContactNumber	The county contact phone number.	The variable will be populated with the Primary Number for the County Contact Number listed on the "Correspondence Detail" page for Los Angeles County. If there is no phone number, the field will be blank. For the Migration Counties, it will

		populate with the worker's phone number. It will have the following format: (###) ###-####.
WTWorkerName	The name of the WTW or Refugee Employment Program (REP) worker.	The variable will be populated with the name of the WTW or REP (LA County only) worker. It will have the following format: First name Last Name. If there is no worker assigned, the worker name will be populated with the default value of 'Customer Rep'.
StateWelfareRights OrganizationAddress	The address of the State Welfare Rights Organization.	This variable will be populated with the address of the State Welfare Rights Organization. The address is listed on the "Correspondence Detail" page. For Los Angeles County, it is the Welfare Rights office closest to the participant. For the Migration Counties, it is the office listed on the "Correspondence List" page with an office type of Coalition of California Welfare Rights Organizations (CCWRO).
StateWelfareRights Organization PhoneNumber	The phone number of the State Welfare Rights Organization.	This variable will be populated with the phone number of the State Welfare Rights Organization. It will use the Toll-Free Number listed on the "Correspondence Detail" page. If the Toll-Free number is not available, it will use the Primary Number. It will have the following format: (###) ###-####. For Los Angeles County, it is the Welfare Rights office closest to the participant. For the Migration Counties, it is the office listed on the "Correspondence List" page

		with an office type of CCWRO.
LegalAidAddress	The address of the Legal Aid office.	This variable will be populated with the address listed on the "Correspondence Detail" of the Legal Aid office. For Los Angeles County, it is the Legal Aid office closest to the District Office. For the Migration Counties, it is the office listed on the "Correspondence List" page with an office type of Legal Aid.
LegalAidPhoneNumber	The phone number of the Legal Aid office.	This variable will be populated with the phone number of the Legal Aid office. It will use the Toll-Free Number listed on the "Correspondence Detail" page for the Legal Aid office type. If the Toll-Free number is not available, it will use the Primary Number. For San Bernardino County, it will use the Additional Number. It will have the following format: (###) ###-####. For Los Angeles County, it is the Legal Aid office closest to the District Office. For the Migration Counties, it is the office listed on the "Correspondence List" page with an office type of Legal Aid.

- b. Update the non-header fields to be editable when they are blank or pre-populated.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	WTW 31 Mockup	WTW31_EN.pdf WTW31_SP.pdf WTW31_AE.pdf WTW31_CA.pdf WTW31_CH.pdf WTW31_KO.pdf WTW31_RU.pdf WTW31_TG.pdf WTW31_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
706	The CONTRACTOR shall update the "County Contact No" pre-population logic of the LRS WTW 31 (10/06)-Request to stop a Welfare-to-Work sanction) form to be county specific.	N/A	Form updated as specified in the requirement.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207438 | DDID 571

Migrate C-IV WDTIP Jobs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

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6/10/2020	1.0	Initial Draft	Avi Bandaranayake
9/28/2020	1.1	Updated based on DEL comments	Avi Bandaranayake

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1 OVERVIEW

This DDID will migrate and merge the existing C-IV Welfare Data Tracking Implementation Project (WDTIP) interfaces into CalSAWS.

1.1 Current Design

Currently LRS/CalSAWS does not process the monthly inbound WDTIP Approaching Clocks Report file or the WDTIP Exceeding Clocks Report file. Instead, the system will automatically send a participant time limit Notice of Action (NOA) when the participant approaches the 42nd, 46th and 48th months of eligibility on CalWORKs.

The WDTIP system will reconcile edits to existing information, identify discrepancies, and send back records with discrepancies to the LRS/CalSAWS via the External Exception/Warning file daily. The WDTIP inbound interface will process the exception file and will create alert records in the LRS/CalSAWS. The WDTIP Alert Search page displays these alerts based on the search criteria.

The LRS/CalSAWS WDTIP Outbound interface detects changes related to the time on aid clock and creates appropriate transactions that are sent to WDTIP daily.

1.2 Requests

Migrate C-IV WDTIP functionality to CalSAWS.

1.3 Overview of Recommendations

1. Migrate all jobs related to Approaching Clocks Report handling from C-IV to LRS/CalSAWS.
2. Migrate all jobs related to Exceeding Clocks Report handling from C-IV to LRS/CalSAWS.
3. Migrate the FTP jobs for county file handling from C-IV to LRS/CalSAWS.
4. Merge all jobs related to the daily Alerts file.
5. Merge all jobs related to the daily Outbound interface to WDTIP.

1.4 Assumptions

1. There will be no changes to the Approaching Clocks Report processing or Exceeding Clocks Report processing for Los Angeles County.
2. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted in to the batch job.
3. WDTIP files for CalWIN counties will follow the same naming conventions as existing files for C-IV and LRS/CalSAWS.
4. Task framework and tasks from DDID 34 (CA-214928) & DDID 655 (CA-214929) will be in place prior to implementation of this DDID.
5. SCRs CA-214893 (DDID 1628) and CA-214899 (DDID 1629) are responsible for migrating the automated actions defined in Section 2.1.2 & 2.1.2 table.

2 RECOMMENDATIONS

2.1 C-IV Approaching Clocks Report and FTP Job

2.1.1 Overview

This job will process the list of individuals provided by WDTIP who are in months 54 and 58 of the 60-month time limit for the Temporary Assistance for Needy Families (TANF) clock, and approaching 48 months for CalWORKs clock.

This job will also process the list of individuals provided by WDTIP who are in Welfare-to-Work (WTW) programs and are currently in month 18 of the 24-month clock, or month 21 of the 24-month clock. Tasks and Reminders will be created to alert workers to take further action.

2.1.2 Description of Change

1. Port job and merge code associated with PIXXE810 (FTP) and PIXXE811 (processing) from C-IV into CalSAWS.
2. Create BPCRs and BSCRs to allow these jobs to run for all 57 counties.
3. This job should run in conjunction with the existing CalSAWS jobs for Los Angeles County.
4. The following tasks (table below) will be created as part of PIXXE811.

Automated Action Name	Description
CalWORKs Recipient Approaching TANF Time Limit: 58 Months	An active CalWORKs recipient has reached their 58 month mark. The CalWORKs recipient is approaching the 60 month TANF time limit.
CalWORKs Recipient Approaching TANF Time Limit: 54 Months	An active CalWORKs recipient has reached their 54 month mark. The CalWORKs recipient is approaching the 60 month TANF time limit.
WTW Recipient: Reached 21st Month	An active WTW recipient has reached their 21 month mark. The WTW recipient is approaching the 24 month WTW time limit.
CalWORKs Recipient Approaching CW Time Limit: 42 Months	An active CalWORKs recipient has reached their 42 month mark. The CalWORKs recipient is approaching the 48 month CalWORKs time limit.
CalWORKs Recipient Approaching CW Time Limit: 46 Months	An active CalWORKs recipient has reached their 46 month mark. The CalWORKs recipient is approaching the 48 month CalWORKs time limit.
WTW Recipient: Reached 18th Month	An active WTW recipient has reached their 18 month mark. The WTW recipient is approaching the 24 month WTW time limit.

Table 2.1.2.1 Automated Action Task Table for PIXXE811

2.1.3 Execution Frequency

Monthly

2.1.4 Key Scheduling Dependencies

PIXXE810 should run prior to PIXXE811

2.1.5 Counties Impacted

C-IV and CalWIN counties

2.1.6 Data Volume/Performance

None.

2.1.7 Interface Partner

WDTIP

2.1.8 Failure Procedure/Operational Instructions

Standard failure procedure.

2.2 C-IV Exceeding Clocks Report and FTP Job

2.2.1 Overview

This job will process the list of individuals provided by WDTIP that contains a detailed list of active individuals, by Client Index Number (CIN), who have exceeded the time limit on the TANF 60-month and CalWORKs 48-month clocks. Tasks will be generated for such individuals fitting the below criteria, who are currently active in a CalWORKs program.

2.2.2 Description of Change

1. Port job and merge code associated with PIXXE816 (FTP) and PIXXE815 (processing) from C-IV into CalSAWS.
2. Create BPCRs and BSCRs to allow these jobs to run for all 57 counties.
3. This job should run in conjunction with the existing CalSAWS jobs for Los Angeles County.
4. The following task (table below) will be created as part of PIXXE815.

Automated Action Name	Description
CalWORKs Recipient: TANF Time Limit Exceeded	An active CalWORKs recipient has exceeded their TANF time limit of 60 months. Review for appropriate action.

CalWORKs Recipient: CalWORKs Time Limit Exceeded	An active CalWORKs recipient has exceeded their CalWORKs time limit of 48 months. Review for appropriate action.
WTW Recipient: Time Limit Reached	An active CalWORKs recipient is in the 24th month of their Welfare to Work (WTW) time clock. Review for appropriate action.

Table 2.2.2.1 Automated Action Task Table for E815

2.2.3 Execution Frequency

Monthly

2.2.4 Key Scheduling Dependencies

PIXXE816 should run prior to PIXXE815

2.2.5 Counties Impacted

C-IV and CalWIN counties.

2.2.6 Data Volume/Performance

No change.

2.2.7 Interface Partner

WDTIP

2.2.8 Failure Procedure/Operational Instructions

Standard failure procedure.

2.3 Outbound WDTIP Jobs

2.3.1 Overview

WDTIP Outbound interface detects changes related to the time on aid clock and creates appropriate transactions that are sent to the WDTIP daily. The interface writes the transactions listed below to individual files before merging them into a single file and sending it to WDTIP.

2.3.2 Description of Change

1. For all jobs listed in the Table below create BPCRs and BSCRs to allow these jobs to run for all 58 counties.

2. When validating the fields and sections in the outbound file, if an `InvalidFieldException` is encountered:
 - a. Throw a batch exception of priority level "Error" if the job is a Los Angeles County job.
 - b. Throw a batch exception of priority level "Critical" if the job is for any other county besides Los Angeles County.

WDTIP Description	WDTIP job
WDTIP LD01 Transaction Writer	PO19E820
WDTIP LD02 Transaction Writer	PO19E821
WDTIP LD03 Transaction Writer	PO19E822
WDTIP LD05 Transaction Writer	PO19E823
WDTIP LD06 Transaction Writer	PO19E824
WDTIP LD07 Transaction Writer	PO19E825
WDTIP LD08 Transaction Writer	PO19E826
WDTIP LD09 Transaction Writer	PO19E827
WDTIP LD10 Transaction Writer	PO19E828
WDTIP Merge File Writer	PO19E806 - (FTP)

Table 2.3.2.1 Outbound jobs

2.3.3 Execution Frequency

Daily

2.3.4 Key Scheduling Dependencies

No change.

2.3.5 Counties Impacted

All counties.

2.3.6 Data Volume/Performance

Unknown.

2.3.7 Interface Partner

WDTIP

2.3.8 Failure Procedure/Operational Instructions

No change.

2.4 WDTIP Inbound Jobs

2.4.1 Overview

The system sends outbound data to WDTIP daily. If there are any errors in this file, WDTIP sends a daily error file to notify the system of any errors. The WDTIP inbound interface will process the exception file and will create alert records in the System. The WDTIP Alert Search page displays these alerts based on the search criteria.

2.4.2 Description of Change

1. Create BPCRs and BSCRs to allow the jobs listed in the table below to run for all 57 counties.
2. There will be one job per county.

WDTIP Description	WDTIP job
Inbound FTP job	PIXXE806
Processing job	PIXXE814

Table 2.4.2.1 WDTIP Inbound jobs

2.4.3 Execution Frequency

Daily

2.4.4 Key Scheduling Dependencies

No change.

2.4.5 Counties Impacted

All counties.

2.4.6 Data Volume/Performance

Unknown.

2.4.7 Interface Partner

WDTIP

2.4.8 Failure Procedure/Operational Instructions

No change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
571	<p>Original: The CONTRACTOR shall incorporate the current C-IV WDTIP Inbound Jobs at the time of migration.</p> <p>Revised: The CONTRACTOR shall incorporate the current C-IV WDTIP Inbound and Outbound Jobs at the time of migration.</p>	<ul style="list-style-type: none"> - The C-IV WDTIP Inbound Jobs that exist in C-IV at the time the existing C-IV Inbound WDTIP functionality is migrated will also be ported into the CalSAWS. This includes the functionality that logs a priority level of "Critical" and aborts the batch job when an invalid field or record is encountered. - The batch jobs will run for all 58 counties. - The Batch properties and scheduling will have to be updated for each wave separately 	Porting over C-IV jobs for approaching and exceeding clocks functionality. Extending outbound and inbound jobs to run for all 58 counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207451 | DDID-452

Update CW 2200 – Request for Verification

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lawrence Samy
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/29/2019	1.0	Initial revision	Lawrence Samy
12/19/2019	1.1	Removed appointment section from CW 2200 for Los Angeles County	Lawrence Samy
08/20/2020	1.2	Minor additions and corrections	Rainier Dela Cruz
09/24/2020	1.3	Removed BRM address from the CW 2200.	Rainier Dela Cruz
09/28/2020	1.4	Updates based on deliverable comments.	Rainier Dela Cruz
11/02/2020	1.5	Added a clarification on the program checkboxes	Rainier Dela Cruz

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1 OVERVIEW

The C-IV CW 2200 Request for Verification form along with its functionality will be migrated into LRS/CalSAWS and merged with some elements from the existing LRS/CalSAWS CW 2200.

1.1 Current Design

The CW 2200 is used to request needed verifications from customers. The form pre-populates with pending verifications selected by the user on the Verification List page. The key differences between C-IV and LRS/CalSAWS are listed below:

C-IV:

1. The Verifications table is a repeating table. Each verification selected on the "Verification List" page will populate on the CW 2200 and will be a separate data row in the table.
2. The Item cell of the Verifications table concatenates the Type and Description of the verification and populates it in the cell.
3. Each pre-populated data row expands to fit the contents of the concatenated value described in #2.

Due Date	Item #	Item	Person	Program	Check (✓) the box that applies to you
08/15/2019		Employment Information - W2 and copy of tax return for last year or 2 most recent pay stubs.	Four, Mom	<input type="checkbox"/> CW <input type="checkbox"/> RCA <input type="checkbox"/> CF <input type="checkbox"/> MC <input type="checkbox"/> GA/GR <input type="checkbox"/> CAPI	<input type="checkbox"/> I don't have the proof. <input type="checkbox"/> I tried but can't get the proof. <input type="checkbox"/> I know somebody who can verify this information. <input type="checkbox"/> I have filled out the Release form to get help.
08/19/2019		School Attendance - Proof of enrollment for current semester	Four, Mom	<input type="checkbox"/> CW <input type="checkbox"/> RCA <input type="checkbox"/> CF <input type="checkbox"/> MC <input type="checkbox"/> GA/GR <input type="checkbox"/> CAPI	<input type="checkbox"/> I don't have the proof. <input type="checkbox"/> I tried but can't get the proof. <input type="checkbox"/> I know somebody who can verify this information. <input type="checkbox"/> I have filled out the Release form to get help.
08/19/2019		Motor Vehicle Registration - Registration, insurance, and copies of financial agreements for all vehicles in the home. You informed us of: 1992 Pontiac Firebird 1987 Honda CR-X 2002 Toyota Corolla Motor Home	Four, Mom	<input type="checkbox"/> CW <input type="checkbox"/> RCA <input type="checkbox"/> CF <input type="checkbox"/> MC <input type="checkbox"/> GA/GR <input type="checkbox"/> CAPI	<input type="checkbox"/> I don't have the proof. <input type="checkbox"/> I tried but can't get the proof. <input type="checkbox"/> I know somebody who can verify this information. <input type="checkbox"/> I have filled out the Release form to get help.

Figure 1.1.1 – C-IV CW 2200 Verification Table Example

4. If the Medi-Cal program is selected from the "Document Parameters" page when generating the CW 2200, the checkbox labeled "I have filled out the Release of Information" and the "Authorization for Release of Information" will not display. The bullet point labelled "If you need the county to help get the proof, fill out the 'Authorization for Release of Information' form and return it to the county." Is replaced with "Please contact your worker if you need assistance in obtaining proof."

- The "Verification List" page in C-IV allows 55 verifications to be selected. A standard #10 outbound envelope allows for 20 impressions (10 physical pieces of paper). The number of verifications populated on the CW 2200 is limited by the number of impressions. If verification population causes the form to become 20 pages, the "Types of Verification/Sources of Proof" and "Authorization for Release of Information" sections will not display.

LRS/CalSAWS:

- The verifications selected from the "Verification List" page are listed within a single data row. The type of verification is listed in the Item cell. If multiple verifications are selected, they are listed as individual line items within the single row of the verifications table.
- A maximum of 19 verifications will print on the CW 2200. If a verification uses more than one line in the Item data cell, the maximum will decrease by one.
- The program checkboxes are checked based on which programs are Active or Pending on the case.

Due Date	Item #	Item	Person	Program	Check (✓) the box that applies to you
09/20/2019	1	Motor Vehicle	Mom Four	<input checked="" type="checkbox"/> CW	<input type="checkbox"/> I don't have the proof
09/22/2019	2	Employment Information	Mom Four	<input type="checkbox"/> RCA	<input type="checkbox"/> I tried but can't get the proof
09/30/2019	3	School Attendance	Mom Four	<input checked="" type="checkbox"/> CF	<input type="checkbox"/> I know somebody who can verify this information
				<input type="checkbox"/> MC	<input type="checkbox"/> I have filled out the Release form to get help
				<input type="checkbox"/> GR/GA	
				<input type="checkbox"/> CAPI	

Figure 1.1.2 - LRS CW 2200 Verification Table Example

- There is an Appointment section above the Verification table on the LRS CW 2200.
 - When the user selects "Appointment" from the "Verification List" page, they are taken to the "Customer Appointment Detail" page to create an appointment. If the user checks the "Print Appointment Letter" checkbox, the Document Parameters page will come up to generate the CW 2200 when the appointment is saved.

You have an appointment on 09/01/2019 at 10:00 AM to see an Eligibility Worker at:
 District Name and Address

Figure 1.1.3 - LRS CW 2200 Appointment Section

- b. The verifications selected from the "Verification List" page will be pre-populated on the form. If no verifications are selected, all pending verifications will pre-populate on the CW 2200 as described in #2, above.

1.2 Requests

Migrate the C-IV version of the CW 2200 into LRS/CalSAWS with the following modifications:

1. Migrate the C-IV dynamic functionality for when the form is generated for Medi-Cal. The checkbox labeled "I have filled out the Release of Information" and the "Authorization for Release of Information" will not display when the CW 2200 is generated for Medi-Cal. The bullet "If you need the county to help get the proof, fill out the "Authorization for Release of Information" form and return it to the county." will be replaced with "Please contact your worker if you need assistance in obtaining proof."
2. The fields in the body of the CW 2200 will be unlocked and editable – even when pre-populated.
3. Additional information will populate in the Item field of the Verification table.

1.3 Overview of Recommendations

1. Migrate the C-IV CW 2200 into LRS/CalSAWS.
2. Migrate the C-IV functionality for when Medi-Cal is selected from the program dropdown on the "Document Parameters" page.
3. Make the fields of the CW 2200 editable, even though the field is pre-populated.
4. Update the pre-population logic for the Item field of the Verification table.

1.4 Assumptions

1. Changes will be made to appointment functionality with this update.
 - a. Los Angeles County will not generate the CW 2200 from the Customer Appointment Detail page when the Print Appointment Letter checkbox is checked, and the appointment is saved. The new generic appointment letter, CSF 111 form, is being added with CA-212469 scheduled for the same release as this SCR.
 - b. The 57 migration counties will generate the CSF 105 – Appointment Letter – from the Customer Appointment Detail page when the Print Appointment Letter checkbox is checked, and the appointment is saved.
 - c. With CA-207368 (DDID 1198), the generate form button on the Verification List page will be updated to allow the user the option to generate CW 2200 or CSF 103 (Verification Request List) form.
2. No changes to Data Collection pages or "Verification List" page will be made.
3. The BRM address will be added with SCR CA-220106.
4. No updates will be made to the Your Benefits Now (YNB) functionality for the CW 2200.

2 RECOMMENDATIONS

2.1 CW 2200 – Request for Verification

2.1.1 Overview

The CW 2200 is used to request needed verifications from customers. The form prepopulates with pending verifications selected by the user on the Verification List page.

2.1.2 Description of Change

1. Migrate the C-IV version of CW 2200 into CalSAWS.

Form Number: CW 2200 (6/19)

Form Name: Request for Verification

Form Header: CalSAWS Standard Header

Form Footer: CalSAWS Standard Footer

Programs: All

Forms Category: Form

Languages: Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Korean, Lao, Mandarin (Chinese), Other Chinese Language, Russian, Spanish, Tagalog/Filipino, and Vietnamese.

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

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

- a. The CW 2200 will have the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

- b. The CW 2200 will have the following mailing option:

Mailing Options	Option for CW 2200
Mail-To (Recipient)	The individual selected on the 'Customer Name' dropdown on the "Document Parameters" page.
Mailed From (Return)	Worker's Office/District Office Address
Mail-back-to Address	N/A

Mailing Options	Option for CW 2200
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

2. Update the CW 2200 to do the following when Medi-Cal is selected from the program dropdown on the "Document Parameters" page:
 - a. Hide the checkbox and text "I have filled out the Release form to get help."
 - b. Hide the bullet and text which reads "If you need the county to help get the proof, fill out the 'Authorization for Release of Information' form and return it to the county."
 - c. Display the bullet and text which reads "Please contact your worker if you need assistance in obtaining proof" in place of the bullet in the recommendation above.
 - d. Hide the "Authorization for Release of Information" section.

Note: When a program other than Medi-Cal is selected from the program dropdown on the "Document Parameters" page, the elements in a, b, and d above will show. The element in c will not show.

3. Migrate the C-IV functionality of creating a new row in the Verification table for each pending verification populated on the CW 2200.
4. Migrate the C-IV functionality of growing the data row vertically in order to accommodate the text prepopulated in the Item cell of the Verification table.

Note: This will only happen for pre-populated data cells. The system is unable to expand the cell in real time based on entries typed directly into the table on the form.

5. CW 2200 form will be pre-populated with the following information:

Section	Field	Description
CW 2200 Page 3	You have asked for – Programs Checkbox	This will use the current logic in CalSAWS. It will check the boxes for all Active and Pending programs in the case.
CW 2200 Page 3	Due Date	VERIF.DUE_DATE will be populated in MM/DD/YYYY format
CW 2200 Page 3	Item #	Will be populated with the Verification Type Item numbers. For Verifications Type to Item number mapping please see below CW 2200 Item # Field Mappings Table #1 . For example, if the Verification Type is "Country of Birth" then

Section	Field	Description
		the Item # will be populated with 1 as per Table 1 below.
CW 2200 Page 3	Item	<p>1) "Verification Type – Verification Description" - Will be populated with Verification Type followed by a hyphen "- ", then Verification Description from the Verification Detail page. Verification Description is currently being populated in the C-IV CW 2200 and will be migrated into CalSAWS CW 2200.</p> <p>2) "Verification Type – Source Name – Verification Description" - Will be populated for specific verification types. Please refer to CW 2200 Verification Source Mapping Table #2 below for more information.</p> <p>NOTE: All pre-population for Spanish forms will be in Spanish except for Verification Description, which will be the user entered value from the Verification Detail page.</p> <p>For English and all threshold languages, pre-population will be in English like current CalSAWS functionality.</p>
CW 2200 Page 3	Person	Person Name from PERS table
CW 2200 Page 3	Program	This will use the current logic in CalSAWS. It will check the boxes for all Active and Pending programs in the case and the verification due date is greater than the current date.
CW 2200 Page 3	Check (✓) the box that applies to you	Will be blank and editable

CW 2200 Item # Field Mappings Table #1:

Section	Verifications Type	Item #
CW 2200 Item # Field Mapping	<ol style="list-style-type: none"> 1. Country of Birth 2. Vital Statistics US Citizenship 	1
CW 2200 Item # Field Mapping	<ol style="list-style-type: none"> 1. Apply for Unconditionally Available Income 2. Child Care - Monthly Income 3. Employment Information 4. GR Work Requirement - EDD 5. GR Work Requirement - UIB 6. Income 7. Other Program Assistance 8. Self-Employment Expense 9. Termination Reason 10. Transferred Income 11. Unemployment Deprivation 	2
CW 2200 Item # Field Mapping	<ol style="list-style-type: none"> 1. 40 Quarters of Work 2. Battered Non-Citizen 3. Hmong/Lao Documentation 4. Lawful Presence 5. Sponsor Abuse 6. Sponsored Non-Citizen 7. USCIS Document 8. Visa/VAWA Application 	3
CW 2200 Item # Field Mapping	<ol style="list-style-type: none"> 1. Liquid Property 2. Motor Vehicle 3. Motor Vehicle Encumbrance 4. Personal Property 5. Real Property 6. Real Property List and Lien 7. Transferred Property 	4
CW 2200 Item # Field Mapping	<ol style="list-style-type: none"> 1. Active Duty 2. Child Care - IEP/IFSP 3. Expected Return Date 4. Homeless Exception 5. Incarceration 6. Military Service 7. Parent's Refusal to apply for a Child 18-21 8. School Attendance 	5

Section	Verifications Type	Item #
	9. School Attendance Employment and Training 10. School End Date 11. School Expected Completion Date 12. WTW Orientation	
CW 2200 Item # Field Mapping	1. ATIN/ITIN 2. Name/Identity 3. SSN 4. Vital Statistics 5. Vital Statistics Identity	6
CW 2200 Item # Field Mapping	1. Date of Birth 2. Date of Death 3. Legal Guardianship 4. Relationship 5. Roomer/Boarder	7
CW 2200 Item # Field Mapping	1. Expense Amount 2. Utility Expense	8
CW 2200 Item # Field Mapping	1. Residence	9
CW 2200 Item # Field Mapping	1. Other Health Care Coverage 2. Special Need	10
CW 2200 Item # Field Mapping	1. MEDS Minimal Essential Coverage 2. Medical Condition 3. Medicare Information 4. Pregnancy 5. Third Party Liability	11
CW 2200 Item # Field Mapping	1. Immunizations	12

CW 2200 Verification Source Mapping Table #2:

Section	Verification Type	Verification Source
CW 2200 Verification Source Mapping	1. School Expected Completion Date 2. School End Date 3. School Attendance	Will be populated with the school name for these verification types. For example, for Verification type School End Date, the field will be populated with "School End Date – School Name – Verification Description"

Section	Verification Type	Verification Source
		VERIF.SCHL_ATTEND_ID, SCHL_ATTEND.ORG_ID to populate the School Name
CW 2200 Verification Source Mapping	1. Income	The field will be populated along with the Income Type. For example, for Verification type Income, the field will be populated with "Income – Income Type (Employer Name) – Verification Description" CT_186 Decoded value of Income Type from INC.TYPE_CODE. Note: Employer Name (EMP.EMP_NAME) – If entered
CW 2200 Verification Source Mapping	1. Liquid Property 2. Motor Vehicle 3. Personal Property 4. Real Property	The field will be populated along with the Property Type. For example, for Verification type Motor Vehicle, the field will be populated with "Motor Vehicle – Property Type – Verification Description" CT_208 decoded value of Property Type from PROP.TYPE_CODE
CW 2200 Verification Source Mapping	1. Special Need	The field will be populated along with the Special Need Type. For example, for Verification type Special Need, the field will be populated with "Special Need – Special Need Type – Verification Description" CT_200 decoded value of Property Type from SPEC_NEED.TYPE_CODE
CW 2200 Verification Source Mapping	1. Employment Information	The field will be populated along with the Employer Name. For example, for Verification type Employment Information, the field will be populated with "Employment

Section	Verification Type	Verification Source
		Information – Employer Name – Verification Description” EMP.EMP_NAME
CW 2200 Verification Source Mapping	1. Other Program Assistance	The field will be populated along with the Program Name. For example, for Verification type Other Program Assistance, the field will be populated with “Other Program Assistance – Program Name – Verification Description” CT_18 decoded value of Property Type from OTHER_PGM_ASSIST.PGM_CODE
CW 2200 Verification Source Mapping	1. Expense Amount	The field will be populated along with the Expense Type. For example, for Verification type Expense Amount, the field will be populated with “Expense Amount – Expense Type – Verification Description” CT_198 decoded value of Expense Type from EXPN.TYPE_CODE

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CW 2200 Mockup	CW2200_EN.pdf CW2200_SP.pdf CW2200_VI.pdf CW2200_RU.pdf CW2200_FA.pdf CW2200_FL.pdf CW2200_AR.pdf CW2200_AE.pdf CW2200_CA.pdf CW2200_CN.pdf

			CW2200_HM.pdf CW2200_KO.pdf CW2200_LA.pdf
2	Client Correspondence	CW 2200 CT170 Spanish Translations	CW 2200 Spanish Translations.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
452	<p>Original: The CONTRACTOR shall migrate form CW 2200 (12/14)-Request for Verification with the following updates:</p> <ol style="list-style-type: none"> 1) The following sentence will be added to the form "You have an appointment on at to see an Eligibility Worker at:". The sentence shall display for Los Angeles County. The display of the sentence for the 57 counties shall be configurable 2) Migrate the C-IV dynamic functionality of making the checkbox labelled "I have filled out the Release of Information" disappear when dynamically generating the form "Authorization for Release of Information" if MC program is selected 3) Ability to edit and append the CW 2200 4) Ability to auto populate additional information from the data collection pages onto the form <p>Revised: The CONTRACTOR shall migrate form CW 2200 (6/19)-Request for Verification with the following updates:</p> <ol style="list-style-type: none"> 1) Migrate the C-IV dynamic functionality of making the checkbox labelled "I have filled out the Release of Information" disappear when dynamically generating the form "Authorization 	<p>Original:</p> <ul style="list-style-type: none"> • The following requirement states "Ability to auto populate additional information from the data collection pages onto the form will be determined in design sessions)". This requirement references new scope that will be defined during the Design phase. CONTRACTOR has not estimated this future scope. When the future scope is defined, CONTRACTOR will provide an updated estimate. • "Configurable" means that the sentence will display or not based on the county decision. The text of the sentence will not be updated per county choice. • Additional information to be populated will be determined based on a verification by verification analysis with the CONSORTIUM (each verification type will be assessed to see which additional 	Migrated C-IV form CW 2200 and made requested updates.

	<p>for Release of Information" if MC program is selected</p> <p>2) Ability to edit and append the CW 2200</p> <p>3) Ability to auto populate additional information from the data collection pages onto the form</p>	<p>information needs to be pulled).</p> <ul style="list-style-type: none"> • Data table on CW 2200 will not be modified. Additional information will be appended to the item description and populated in that cell. <p>Revised:</p>	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207453 | DDID 428

PA 2327 Wording Update

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/2/2019	1.0	Original Draft	Jamie Ng
07/24/2019	1.1	Updates per DEL review comments	Brian Furlong
07/02/2020	1.2	Updates to comply to design standards	Rainier Dela Cruz
08/05/2020	1.3	Added recommendation to update the button on the Reception Log Detail page	Rainier Dela Cruz
08/25/2020	1.4	Removed the recommendation to turn off threshold language. The SCR that will be updated the threshold version of the form (CA-208662) will be going in the same release.	Rainier Dela Cruz
08/27/2020	1.5	Updates per QA comments	Rainier Dela Cruz
09/28/2020	1.6	Updates per deliverable comments	Rainier Dela Cruz

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1 OVERVIEW

The PA 2327 (Receipt for Documents) form is used to provide a receipt to customers when they provide forms and/or documents to a worker.

1.1 Current Design

The verbiage of the PA 2327 form is specific to Los Angeles County.

1.2 Requests

Update the verbiage of the PA 2327 to work for all 58 counties.

1.3 Overview of Recommendations

1. The PA 2327 form will be updated as follows:
 - 1) Update the form number to display the same as the State version in Template Repository (CW 31).
 - 2) Relabel 'Department of Public Social Service' to 'California Department of Social Services' in the header.
 - 3) Update header to replace the 'County of Los Angeles' static text with a dynamically populated variable and populate it with the name of the county where the case is managed.
 - 4) Relabel 'Participant Name' to 'Submitted By'.
 - 5) Relabel 'DFA377.5' to 'CF377.5'.
 - 6) Relabel 'Self-Employment Verification/PA 167' to 'Self-Employment Verification'.
 - 7) Relabel 'Tax Returns (Enter Fiscal Year)' to 'Tax Returns'.
 - 8) Relabel 'GN 6006 Service Provider Referral' to 'Service Provider Referral'.
 - 9) Relabel 'Signed contract for an activity-WTW 2' to 'WTW 2 Plan Activity Assignment (Signed)'.
 - 10) Relabel 'Citizenship/Noncitizen Records/MC 13' to 'Citizenship/Noncitizen Records'.
 - 11) Relabel 'Medical Bills (Number)' to 'Medical Bills'.
 - 12) Relabel 'Dependent Care Expense' to 'Dependent Care Expense Verification'.
 - 13) Relabel 'Bank Statement' to 'Bank Statement(s)'.
 - 14) Relabel 'Child Care form-PA 129' to 'Child Care General Information form'.
 - 15) Move 'QR 7' from checkbox to 'Other' section.
 - 16) Move 'QR 3LA' from checkbox to the 'Other' section.
 - 17) Update the 'Note' to 'Note: For Medi-Cal cases, if original copies of U.S. Citizenship and/or Identity documents are submitted, the DHCS 0011 Proof of Acceptable Citizenship or Identity Document will be provided by a worker'.
 - 18) Relabel 'Staff Person Receiving Document' to 'Received By'.
 - 19) Update the form name on the footer to match the State version (CW 31, revision date 11/19).

2. Update the button on the 'Reception Log Detail' page from 'Generate PA 2327' to 'Generate CW 31'.

1.4 Assumptions

1. Only the header of the form will be auto populated.
2. The updates to the form will be done for English only. Updates to threshold languages version of the form will be addressed by **SCR CA-208662**.

2 RECOMMENDATIONS

2.1 PA 2327 Form Updates to CW 31

2.1.1 Overview

The verbiage of the PA 2327 form is specific to Los Angeles County. Update the verbiage of the PA 2327 to work for all 58 counties.

Updated Form Number: CW 31

Current Form Name: Receipt for Documents

Language: English

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

COUNTY OF <CountyName> (3)		CALIFORNIA DEPARTMENT OF SOCIAL SERVICES (2)	
RECEIPT FOR DOCUMENTS			
CASE NAME:	DATE:	WORKER ID:	CASE NO.:
SUBMITTED BY: (4)		OFFICE:	

Figure 2.1.2.1 – CW 31 Form Top Section Updates

COUNTY RECEIVED THE FOLLOWING:	
<input type="checkbox"/> SAR 7/MC 176 TMC- Month: _____	<input type="checkbox"/> Citizenship/Noncitizen Records (10)
<input type="checkbox"/> SAR 3/AR 3/CF 377.5 Month: (5) _____	<input type="checkbox"/> Immunization Records
<input type="checkbox"/> Birth Certificate(s)	<input type="checkbox"/> Rent Receipt/Rental Agreement
<input type="checkbox"/> Social Security Card Number Verification	<input type="checkbox"/> Utility Bills
<input type="checkbox"/> Pregnancy Verification/Medical Verification	<input type="checkbox"/> Medical Bills (11)
<input type="checkbox"/> Employment Verification/Pay Stub(s)	<input type="checkbox"/> Dependent Care Expense Verification (12)
<input type="checkbox"/> Self-Employment Verification (6)	<input type="checkbox"/> Bank Statement(s) (13)
<input type="checkbox"/> Unearned Income Verification	<input type="checkbox"/> Spousal/Child Support Expense Verification
<input type="checkbox"/> Tax Returns: (7) _____	<input type="checkbox"/> Exemption/Good Cause forms
<input type="checkbox"/> Service Provider Referral (8)	<input type="checkbox"/> Child Care General Information form (14)
<input type="checkbox"/> WTW 2 Plan Activity Assignment (Signed) (9)	<input type="checkbox"/> Report Cards/School Attendance Records/Financial Aid/ Progress Reports:
<input type="checkbox"/> Ancillary Request (books/tools/supplies/clothes)	<input type="checkbox"/> Other: (QR 7/QR 3LA) (15/16)
<input type="checkbox"/> Ancillary Receipts (books/tools/supplies/clothes)	

Figure 2.1.2.2 – CW 31 Form Body Updates

(17)
 Note: For Medi-Cal cases, if original copies of U.S. Citizenship and/or Identity documents are submitted, the DHCS 0011 Proof of Acceptable Citizenship or Identity Document will be provided by a worker.

RECEIVED BY (18) _____ TITLE _____

CW 31 (11/19) (19)

Figure 2.1.2.3 – CW 31 Form Bottom Section Updates

2.1.2 Description of Change

1. Update the record in the Document Template table to end date the PA 2327 form and make it unavailable from the Template Repository. Add a new record in the Document Template table for the CW 31 and make it available from the Template Repository.
2. Relabel 'Department of Public Social Service' to 'California Department of Social Services' in the header.

3. Update header of the form to replace the 'County of Los Angeles' static text with a dynamically populated variable and populate it with the name of the county where the case is managed.
 - a. Update form header to change 'County of Los Angeles' to 'County of <County Name>', where <County Name> is a variable.
 - b. Update the population logic to populate the county name variable. The variable will be populated as follows:

Variable	Description	Population
CountyName	The name of the county.	The variable will be populated with the name of the county where the case is managed. If the form generated in the context of the case, the logic will use the case number to retrieve the county name. If a blank form is generated, the logic will use the logged in user to retrieve the county name.

4. Relabel 'Participant Name' to 'Submitted By'.
5. Relabel 'DFA377.5' to 'CF377.5'.
6. Relabel 'Self-Employment Verification/PA 167' to 'Self-Employment Verification'.
7. Relabel 'Tax Returns (Enter Fiscal Year)' to 'Tax Returns'.
8. Relabel 'GN 6006 Service Provider Referral' to 'Service Provider Referral'.
9. Relabel 'Signed contract for an activity-WTW 2' to 'WTW 2 Plan Activity Assignment (Signed)'.
10. Relabel 'Citizenship/Noncitizen Records/MC 13' to 'Citizenship/Noncitizen Records'
11. Relabel 'Medical Bills (Number)' to 'Medical Bills'.
12. Relabel 'Dependent Care Expense' to 'Dependent Care Expense Verification'.

13. Relabel 'Bank Statement' to 'Bank Statement(s)'.
14. Relabel 'Child Care form-PA 129' to 'Child Care General Information form'.
15. Move 'QR 7' from checkbox to 'Other' section.
16. Move 'QR 3LA' from checkbox to the 'Other' section.
17. Update the 'Note' to 'Note: For Medi-Cal cases, if original copies of U.S. Citizenship and/or Identity documents are submitted, the DHCS 0011 Proof of Acceptable Citizenship or Identity Document will be provided by a worker'.
18. Relabel 'Staff Person Receiving Document' to 'Received By'.
19. Update the form name on the footer to match the State version (CW 31, revision date 11/19).

2.2 Reception Log Detail

2.2.1 Overview

Currently on the 'Reception Log Detail' page, there is a 'Generate PA 2327' button. Since the form number will be updated to CW 31, the button will be relabeled to 'Generate CW 31'.

2.2.2 Reception Log Detail Mockup

Reception Log Detail

*- Indicates required fields

Print Number Full Page Generate Referral Generate CW 31 Edit Close

Case Number: 14000E7 Application Number: Person Name: * Test, Test 37F Office: CalSAWS Project Office Date: 08/05/2020

Description: Individual Type: Emergency Requests: Language: Special Needs:

Visit Information								
Initial Time	Purpose*	Detail	Appt. Time	Program	Status	Number Assigned	Worker ID	Additional E-mail
9:40 AM	Drop Off Document				Waiting	C1		

Print Number Full Page Generate Referral Generate CW 31 Edit Close

Figure 2.2.1 – Reception Log Detail

2.2.3 Description of Changes

1. Update the button on the 'Reception Log Detail' page from 'Generate PA 2327' to 'Generate CW 31'.

2.2.4 Page Location

- **Global: CalSAWS Homepage**
- **Local: N/A**
- **Task: N/A**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CW 31 Mockup	CW31_EN.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
428	<p>Original: The CONTRACTOR shall update the PA 2327-Receipt for Documents (8/13) as follows:</p> <ol style="list-style-type: none"> 1) Relabel the header "Department of Public Social Service" to "California Department of Social Services" 2) Relabel "Participant Name" to "Submitted By" 3) Relabel "Dependent Care Expense" to "Dependent Care Expense Verification" 4) Relabel "Medical Bills (Number)" to "Medical Bills" 5) Relabel "DFA377.5" to "CF377.5" 6) Relabel "Tax Returns (Enter Fiscal Year)" to "Tax Returns" 7) Relabel "GN 6006 Service Provider Referral" to "Service Provider Referral" 8) Relabel "Signed contract for an activity-WTW 2" to "WTW 2 Plan Activity Assignment (Signed)" 9) Relabel "Bank Statement" to "Bank Statement(s)" 10) Relabel "Citizenship/Noncitizen Records/MC 13" to "Citizenship/Noncitizen Records" 11) Relabel "Self-Employment Verification/PA 167" to "Self-Employment Verification" 12) Relabel "Child Care form-PA 129" to "Child Care General Information form" 	<p>There will be no auto population on the form outside of the form header.</p>	<p>Form updated as specified in the requirement.</p>

<p>13) Update the "Note" language to "Note: For Medical cases, if original copies of U.S. Citizenship and/or Identity documents are submitted, the DHCS 0011 Proof of Acceptable Citizenship or Identity Document will be provided by a worker"</p> <p>14) Relabel "Staff Person Receiving Document" to "Received By"</p> <p>15) Update the form name to match the State Name</p> <p>16) Move "QR 7" from checkbox to "Other" section</p> <p>17) Move "QR 3LA" from checkbox to the "Other" section</p> <p>18) Remove Social Security Number</p> <p>Revised:</p> <p>The CONTRACTOR shall update the PA 2327-Receipt for Documents (8/13) as follows:</p> <ol style="list-style-type: none"> 1) Update the form number to display the same as the State version in Template Repository (CW 31). 2) Relabel 'Department of Public Social Service' to 'California Department of Social Services' in the header. 3) Update header to replace the 'County of Los Angeles' static text with a dynamically populated variable and populate it with the name of the county where the case is managed. 		
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<ol style="list-style-type: none"> 4) Relabel 'Participant Name' to 'Submitted By'. 5) Relabel 'DFA377.5' to 'CF377.5'. 6) Relabel 'Self-Employment Verification/PA 167' to 'Self-Employment Verification'. 7) Relabel 'Tax Returns (Enter Fiscal Year)' to 'Tax Returns'. 8) Relabel 'GN 6006 Service Provider Referral' to 'Service Provider Referral'. 9) Relabel 'Signed contract for an activity-WTW 2' to 'WTW 2 Plan Activity Assignment (Signed)'. 10) Relabel 'Citizenship/Noncitizen Records/MC 13' to 'Citizenship/Noncitizen Records'. 11) Relabel 'Medical Bills (Number)' to 'Medical Bills'. 12) Relabel 'Dependent Care Expense' to 'Dependent Care Expense Verification'. 13) Relabel 'Bank Statement' to 'Bank Statement(s)'. 14) Relabel 'Child Care form-PA 129' to 'Child Care General Information form'. 15) Move 'QR 7' from checkbox to 'Other' section. 16) Move 'QR 3LA' from checkbox to the 'Other' section. 17) Update the 'Note' to 'Note: For Medi-Cal cases, if original copies of U.S. Citizenship and/or Identity documents are submitted, the DHCS 0011 Proof of 		
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	<p>Acceptable Citizenship or Identity Document will be provided by a worker'.</p> <p>18) Relabel 'Staff Person Receiving Document' to 'Received By'.</p> <p>19) Update the form name on the footer to match the State version (CW 31, revision date 11/19).</p>		
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208568 | DDID 1967

Modify WTW Batch jobs related to Sanctions to
allow Counties to opt in/opt out

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/3/2020	.01	Initial Draft	Howard Suksanti

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1 OVERVIEW

This SCR will modify Welfare-to-Work (WTW) and Refugee Employment Program (REP) Sanction batch jobs to be enabled for counties that opt in.

1.1 Current Design

The following WTW/REP Sanction batch jobs run for Los Angeles County cases only.

Job Name	Long Description
PB19S882	This job sets WTW/REP program status to Sanction after 20 days in Non-Compliance, when the status reason code is not In Conciliation or Curing Sanction.
PB19S883	This job sets WTW/REP program status to Sanction when the program status is Non-Compliance with status reason code of In process of curing sanction and there is a no-show for the Appraisal appointment.
PB00E179	This batch sweep will create eligibility triggers for all Active CW persons with a WTW Sanction Effective from next Month.

1.2 Requests

Modify LRS/CalSAWS WTW/REP Sanction batch jobs so they can run for multiple counties.

1.3 Overview of Recommendations

1. Modify and rename PB19S882 and PB19S883 to be County 00 jobs.
2. Modify PB00E179 job to run for multiple counties.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Modify and Rename PB19S882 and PB19S883

2.1.1 Overview

PB19S882 – Set WTW/REP Sanction after 20 days is a Los Angeles County specific job.

PB19S883 – Set WTW/REP Sanction after no show on the Appraisal appointment is a Los Angeles County specific job.

As part of this SCR, these 2 jobs will be modified to be “00” jobs and have updated county parameter lists so that the batch job can run for multiple counties.

2.1.2 Description of Change

1. Rename PB19S882 and PB19S883 batch jobs to be a ‘00’ batch jobs.
2. Create a BPCR to update the county code list property to include all 58 counties for both jobs.
3. Create BSCRs to schedule the new “00” jobs to run for LA County.

2.1.3 Execution Frequency

No Change (PB19S882 –Daily Mon-Sat, PB19S883 –Daily Mon-Sat).

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Data Volume/Performance

N/A.

2.1.7 Failure Procedure/Operational Instructions

No Change.

2.2 Modify PB00E179 job

2.2.1 Overview

PB00E179 – Batch EDBC Sweep WTW/REP Sanction effective end currently runs only for Los Angeles County.

As part of this SCR, the batch job will be modified to run for all counties.

2.2.2 Description of Change

1. Create a BPCR to update the county code list property to include all 58 counties.

2.2.3 Execution Frequency

No Change (Monthly Batch 10 day cut-off).

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

N/A.

2.2.7 Failure Procedure/Operational Instructions

No Change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<ul style="list-style-type: none"> - Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones. 	<p>WTW Sanction batch jobs will be modified to be a county-specific batch jobs.</p>

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-208784 | DDID 1967

Update Position Detail to no longer have
Section as a required field

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/10/2020	1.0	Initial Design for Review	ODonnellC

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1 OVERVIEW

As part of the 57 Migration counties joining CalSAWS, the Section field on the Position Detail page needs to be made non-required in order to account for the C-IV and CalWIN counties that do not have a Section association.

1.1 Current Design

Currently in LRS/CalSAWS, Section is a required field on the Position Detail page.

1.2 Requests

As migrating counties do not have a section associated with them, when the migrating counties are added to the CalSAWS System, Section must be changed from a required field to a non-required field on the Position Detail page.

1.3 Overview of Recommendations

1. Update the Section field to be not required on the Position Detail page for all counties except Los Angeles County.

1.4 Assumptions

1. These changes will not impact Los Angeles County.
2. Without having a Section associated, counties will not be able to use the Second Level Authorization functionality within the system.
3. The following reports Dashboards will not display Section information if no Section is specified for the County.
 - a. Managed Personnel (Organizational Hierarchy)
 - b. Child Welfare Program (CWS) Work Order

2 RECOMMENDATIONS

2.1 Position Detail

2.1.1 Overview

The Position Detail page provides a variety of details on the specifics of a worker's position. One of the fields on the page lists a Section which is a required field in the current design. In order to accommodate counties that will be in the system following migration, the Section field will be changed from required to non-required due to those counties not having a section associated with them.

2.1.2 Position Detail Mockup

Position Detail

*- Indicates required fields

Edit

Copy

Close

General Position Information

Worker ID:
19ESGP8I00

Office Name: *
GAIN - RANCHO PARK DISTRICT

Unit ID: *
8I 00

Assignment Type Code:
Continuing

Auto Assign Indicator:
No

SSI Referrals:
No

Authorization Sampling Percentage:
80

Case Load:
Traditional

IHSS Referrals Auto Assignment: *
No

Section:
3S

Position Status: *
Inactive

Worker Level:
3rd Level Reception Log

Max Case Load:
100

Max Intake Case Load:

Current Case Load:
0

Total Percentage of Cases Assigned:
0%

Figure 2.1.1 – Position Detail – Non-Los Angeles County

2.1.3 Description of Changes

1. **Section** – This field will be changed from a required field with the appropriate graphical indicator (i.e. the red asterisk image) to a non-required field with no indicator based on the County of the logged in User.
 - a. Field will remain required for Los Angeles County (County 19). Validation will occur when trying to save Position Detail page with no Section indicated.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Position**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</p>	<p>Make Section not required for all migrating counties, but remain required for LA County.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214148 | DDID 1967

Migrate/Align Skip Issuance Reasons Between
the LRS/CalSAWS and 57 Migration Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Sidhant Garg, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/13/2020	1.0	Initial Version	Jimmy Tu

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1 OVERVIEW

The purpose of this SCR is to migrate/align the Skip Issuance reasons between the LRS/CalSAWS and 57 migration counties. Before creating any issuances, the system validates authorized records (e.g., EDBC, Payment Request) against a set of rules. If any of the rules are not satisfied, it will result in a Skip Issuance which is displayed on the Daily Skip Issuance report with the appropriate reason for this action.

1.1 Current Design

Currently, the LRS/CalSAWS Skip Issuance reasons are only up to date for Los Angeles County. A few reasons exist in LRS/CalSAWS for the 39 C-IV counties but are outdated as they have since been changed in C-IV. Also, there are no Skip Issuance reasons configured for the 18 CalWIN Counties.

1.2 Requests

Migrate/Align Skip Issuance reasons between the LRS/CalSAWS and 57 Migration Counties. This would be achieved by first removing the outdated or invalid reasons that exist in LRS/CalSAWS today for the C-IV Counties. Once removed, the latest data from the C-IV system will be migrated to the LRS/CalSAWS for all 57 migration counties.

1.3 Overview of Recommendations

1. Migrate/Align Skip Issuance reasons between the LRS/CalSAWS and 57 Migration Counties.
 - a. Remove outdated or invalid reasons that exist in LRS/CalSAWS today for the C-IV Counties. Once removed, migrate the latest data from the C-IV system to the LRS/CalSAWS for all 57 migration counties.
2. Remove duplicate Skip Issuance scenarios from the CalSAWS for LA County.

1.4 Assumptions

1. This DDID will not have any impacts on the existing Skip Issuance reasons for Los Angeles County.
2. Skip Issuance logic and rules are common between the CalSAWS and C-IV. C-IV counties will inherit the existing functionality available in CalSAWS after migration.
3. CalSAWS does not support the ARC program and therefore skip issuance scenarios for ARC will not be migrated to CalSAWS from C-IV.
4. Skip Issuance scenarios for GM programs will not be migrated to CalSAWS with this SCR. These will be migrated in CA-201377 that is also targeted for 21.01.

2 RECOMMENDATIONS

2.1 Update Fiscal Transact Map Table

2.1.1 Overview

Fiscal Transact Map table stores all the Skip Issuance reasons for a county. This update is to alter the table to migrate the latest reasons from the C-IV system to the LRS/CalSAWS for all 57 migration counties.

This change will have no effect on Los Angeles County.

2.1.2 Description of Change

1. Delete all "Skip Issuance" scenarios in the Fiscal Transact Map table (fiscal_transact_map) if the records were included in the original LRS/CalSAWS codebase from C-IV, and the county code is not 19 (Los Angeles County).
2. Migrate scenarios as they exist in C-IV today (except for ARC and GM programs) and implement them for all 57 migration counties. This includes 39 C-IV Counties and 18 CalWIN counties.
3. Add the following skip issuance scenarios missing from C-IV counties into the CalSAWS for migration counties. These validations will be based off the county 19 validations. This is for the 39 C-IV counties and 18 CalWIN counties.
 - a. "Skip Issuance Future Month Supplemental Validation"
 - b. "Skip Issuance Mailing Address Validation"
 - c. "Skip Issuance Foster Care Placement Validation"
4. Remove duplicate Skip Issuance scenarios from the Fiscal Transact Map for Los Angeles County (County 19).

2.1.3 Estimated Number of Records Impacted/Performance

5472 C-IV and 126 LRS records deleted, 5967 C-IV and 2718 CalWIN inserted.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Data Change	Skip Issuance Records to be removed from the LRS/CalSAWS.	CA-214148 Skip Issuance Records to be removed from the LRS.xlsx

2	Data Change	Skip Issuance Records to be added to the LRS/CalSAWS.	CA-214148 Add Skip Issuance Records to be added to the LRS.xlsx
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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by</p>	<ul style="list-style-type: none"> - Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones. 	<p>Removing Skip Issuance Reasons in the LRS/CalSAWS if they are from the first baseline migration and are not for county 19. Then, migrating/ implementing current C-IV Skip Issuance Reasons for all 57 Migration counties.</p>

	the CONSORTIUM for approval through the County Change Control Board process.		
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215430 | DDID 1967

Update the Sponsorship Detail Page to Display
Legacy Sponsor Names

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	David Wong
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/25/2020	1	Created Document	David Wong
9/30/20	1.1	Made cosmetic changes according to DEL 42 comments	David Wong
10/5/2020	1.2	Made cosmetic changes according to DEL 42 comments	Amy Gill

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1 OVERVIEW

1.1 Current Design

Sponsorship Detail records contain a person record who is the sponsor in LRS/CalSAWS, but in the C-IV system the sponsorship record is not associated to a person record and is instead just a text field. For LRS/CalSAWS, records are entered in the Sponsorship Detail page for individuals or organizations.

The SAR 72 is sent out along with the SAR 7 if there is a sponsor with the type of 'Individual'. The population logic of the SAR 72 does not populate the sponsor's name.

Due to conversion impacts with the Sponsorship Detail page, changes need to be made to support converted C-IV sponsorship records.

1.2 Requests

Allow a way for users to view converted sponsorship records which are associated to cases converted to the LRS/CalSAWS system.

Update the SAR 72 forms logic to send out the SAR 72 for converted sponsorship records. Update the population logic of the SAR 72 to populate the sponsor's name from the converted sponsorship record.

1.3 Overview of Recommendations

1. Update the Sponsorship List page to display converted records which are associated to converted cases within LRS/CalSAWS.
2. Update the Sponsorship Detail page to display the Sponsor Name that was saved in the C-IV system in a read only field that is for informational purposes only.
3. Update run EDBC page to display the soft validation to prompt the user to add a new sponsor record if there exists a converted record.
4. Update the forms logic to also send out the SAR 72 for sponsors with type of 'Converted'.
5. Update the population logic for the SAR 72 to populate the sponsor's name.

1.4 Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. Converted data available will be handled by a separate effort.
3. Converted records will be indicated when they are transferred to LRS/CalSAWS during the conversion process.

2 RECOMMENDATIONS

2.1 Sponsorship List

2.1.1 Overview

This page displays a list of sponsorship records for a case. A sponsor type of 'Converted' will display for records that were converted from the C-IV system.

2.1.2 Sponsorship List Mockup

Sponsorship List

The screenshot displays a web interface for a 'Sponsorship List'. At the top right is a 'Continue' button. Below it is a 'Search Results Summary' header with 'Results 1 - 1 of 1' on the right. The main area contains a table with the following columns: Name, Sponsor, Sponsor Type, Begin Date, and End Date. There are three rows of data, each with a checkbox on the left and 'Edit' and 'View History' buttons on the right. Below the table is a 'Remove' button on the left and a 'Sponsor Type' dropdown menu with an 'Add' button on the right. At the bottom right is a 'Complete' checkbox and another 'Continue' button.

Name	Sponsor	Sponsor Type	Begin Date	End Date
<input type="checkbox"/> Simpson, Bartholomew 12M	Simpson, Abraham 81M	Individual	02/24/2020	
<input type="checkbox"/> Simpson, Lisa 10F	Simpson, Abraham 81M	Converted	02/24/2020	
<input type="checkbox"/> Simpson, Margaret 5F	Simpson, Abraham 81M	Corporation	02/24/2020	

Figure 2.1.1 – Sponsorship List

2.1.3 Description of Changes

1. In addition to 'Individual' and 'Corporation' Sponsor Types, 'Converted' will be an option for records that were converted over from C-IV.
2. The 'Converted' option will not be selectable in Sponsor Type dropdown next to the Add button.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

No change

2.1.7 Page Usage/Data Volume Impacts

No change

2.2 Sponsorship Detail page

2.2.1 Overview

Update the Sponsorship Detail page to display the Sponsor Name that was saved in the C-IV system in a read only field that is for informational purposes only for converted records.

2.2.2 Sponsorship Detail Mockup

Sponsorship Detail

*- Indicates required fields

Edit

Close

Sponsor: Converted

Sponsored Non-Citizen's Name: *

Simpson, Margaret 8F

Sponsor's Name: *

Simpson, Abraham 83M

Phone Number: *

(310) 555-5555

Sponsor's Household Size: *

1

Total Number of Sponsored Non-Citizens: *

1

Did the sponsor sign an I-864? *

No

Date I-864 Signed:

Does the sponsor help with money? *

No

Does the sponsor help with any of the following?

Begin Date: *

02/24/2020

End Date:

Edit

Close


Figure 2.1.2 – Sponsorship Detail View mode

Sponsorship Detail

*- Indicates required fields

Save and Return

Cancel

Sponsor: Converted	
Sponsored Non-Citizen's Name: *	
Simpson, Margaret 8F	
Sponsor's Name: *	Phone Number: *
Simpson, Abraham 83M	(310) 555-5555
Sponsor's Household Size: *	1
Total Number of Sponsored Non-Citizens: *	1
Did the sponsor sign an I-864? *	Date I-864 Signed:
No	
Does the sponsor help with money? *	
No	
Does the sponsor help with any of the following?	
Begin Date: *	End Date:
02/24/2020	<input type="text"/> 

Save and Return

Cancel

Figure 2.1.3 – Sponsorship Detail Edit mode

2.2.3 Description of Changes

1. If a record was converted from C-IV to LRS/CalSAWS, it will be indicated as 'Converted' in the Sponsor field.
2. Phone Number – This field is used to store the phone number of the sponsor from the converted sponsorship record. This field will only be available when the Sponsor field is equal to 'Converted'.
3. When the Sponsor field has a value of 'Converted', all fields except End Date will be read only.
4. The Establish Change Reason section at the top of the page will be removed as the Change Reason information is not utilized by EDBC.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping for new field

2.2.7 Page Usage/Data Volume Impacts

No change

2.3 Run EDBC page Validation

2.3.1 Overview

The Run EDBC pages are used to process EDBC for different programs. In C-IV for sponsor records the person's name is a free form text field but in LRS/CalSAWS the sponsor records are linked to a person on the case. During conversion of sponsor records from C-IV to LRS/CalSAWS individual sponsor records are not associated to a person. Update the Run EDBC page to add a new soft validation during run EDBC to prompt the user to verify and add new sponsorship records for all eligible sponsored non-citizen's in the assistance unit.

2.3.2 Description of Change

1. Add the following soft validation on the Run EDBC page which will be displayed if the trigger conditions satisfy when the user clicks 'run EDBC' button on this page:

Message:

Sponsorship record was converted. Please verify the converted sponsorship information and create a new sponsorship record for the converted record period for all eligible sponsored non-citizens.

Trigger:

- a. EDBC is run for CalWORKs, CalFresh, and CAPI program
- b. Sponsorship record of sponsor type 'Converted' exists for the benefit month EDBC is being run for.
- c. Sponsored person is currently active on the program.
- d. Sponsorship record is not created after the converted sponsorship record was created for the benefit month EDBC is being run for.

2.3.3 Programs Impacted

CW, CF, CAPI

2.3.4 Performance Impacts

None

2.4 Update the Forms Generation Batch Job

2.4.1 Overview

The SAR 7 batch sweep will insert records into the system transaction table for cases that require a SAR 7 to be generated. The Forms Generation batch job is responsible for generating the SAR 7. While processing the records from the system transaction table, it will also determine if a SAR 72 needs to be sent along with the SAR 7 by checking if there is a sponsor with a type of 'Individual'. If there is a sponsor, it will generate a SAR 72 and if there are multiple sponsors, a SAR 72 will generate for each one. Update the logic to look for sponsors with type of 'Individual' or the new type of 'Converted'.

2.4.2 Description of Change

1. Update the logic that determines if a SAR 72 needs to be sent out to include sponsors with type of 'Individual' or 'Converted'.

2.4.3 Execution Frequency

No Change

2.4.4 Key Scheduling Dependencies

No Change

2.4.5 Counties Impacted

All counties.

2.4.6 Data Volume/Performance

No Change

2.4.7 Failure Procedure/Operational Instructions

No Change

2.5 Updates to the SAR 72 Population Logic

2.5.1 Overview

The form population logic currently does not populate the sponsor's name when the form is generated. Update the population logic to populate the sponsor's name.

2.5.2 Description of Change

1. Update the SAR 72 population logic to populate the name of the sponsor for sponsors with type of 'Individual' or 'Converted':

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
SAR 72 – Page 1	Sponsor's Name	This field will be populated with the sponsor's name.	N	Y	Y

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	CONTRACTOR ASSUMPTIONS	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<ul style="list-style-type: none"> - Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones. 	<p>Sponsorship pages and forms updated to handle converted data.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216086 | DDID 1062

Updates to CMSP Denial and Discontinuance
NOAs

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/06/2020	1.0	Initial Revision	Rainier Dela Cruz
09/02/2020	1.1	Updates based on QA comments	Rainier Dela Cruz

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1 OVERVIEW

The County Medical Services Program (CMSP) provides health care coverage for uninsured low-income, indigent adults that are not otherwise eligible for other publicly funded health care programs. The CMSP Notice of Action (NOA) functionality to send out NOAs to inform the recipient when an action (approval, denial, or discontinuance) has occurred on their case was implemented in LRS/CalSAWS with CA-207384.

1.1 Current Design

When an individual is not eligible for both CMSP and Medi-Cal, the system will generate a CMSP and Medi-Cal (MC) Denial NOA after running and saving the EDBC. However, when a person is not eligible to CMSP, but eligible for MC, the system only generates an MC Approval NOA and does not generate a CMSP Denial NOA. This scenario is also valid for a retroactive benefit month.

When an individual who is currently receiving CMSP loses eligibility to CMSP and becomes eligible to MC, the system will generate an MC Approval NOA after running and saving the EDBC but does not generate a CMSP Discontinuance NOA. Furthermore, when an individual who is currently receiving both CMSP and MC benefits (CMSP LTC and LTC) loses eligibility to CMSP but continues to receive MC, the CMSP Discontinuance NOA does not generate after running and saving the EDBC.

1.2 Requests

Update the CMSP NOA generation logic to generate a denial NOA when an individual is denied for CMSP and approved for MC and a discontinuance NOA when an individual is discontinued from CMSP and approved for MC or continues to receive MC.

1.3 Overview of Recommendations

1. Update the CMSP Denial NOA generation logic to generate a denial NOA when an individual is denied CMSP and approved for MC.
2. Update the CMSP Discontinuance NOA generation logic to generate a discontinuance NOA when an individual is discontinued from CMSP and approved for MC.
3. Update the CMSP Discontinuance NOA generation logic to generate a discontinuance NOA when an individual is discontinued from CMSP, but continues to receive MC.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Update to CMSP Denial and Discontinuance NOAs

2.1.1 Overview

Update the CMSP NOA generation logic to generate a denial NOA when an individual is denied for CMSP and approved for MC and a discontinuance NOA when an individual is discontinued from CMSP and approved for MC or continues to receive MC.

2.1.2 Description of Change

1. Update the trigger conditions for the CMSP Denial NOA rule **_950LrsCmspDenial** to add the new conditions below to the existing conditions (refer to Section 2.4.2.8 of CA-207384 Design document for the existing trigger conditions) to generate a denial NOA when an individual is not eligible to CMSP but approved for MC.
 - a. Generate a CMSP Denial NOA when all the following is true:
 - i. The program type is Medi-Cal.
 - ii. The status of the program is 'Active'.
 - iii. The benefit month is not a retroactive month and is not after the Certification Determination Month (CDM).
 - iv. There is at least one person who is a CMSP applicant and the person is not receiving a CMSP aid code.
2. Update the trigger conditions for the CMSP Retroactive Denial NOA rule **_950LrsCmspRetroDenial** to include the new conditions below to the existing conditions (refer to Section 2.4.2.4 of CA-207384 Design document for the existing trigger conditions) to generate a retro denial NOA when an individual is not eligible to retro CMSP but approved for retro MC.
 - a. Generate a CMSP Retro Denial NOA when all the following is true:
 - i. The program type is Medi-Cal.
 - ii. The status of the program is 'Active'.
 - iii. The benefit month is a retroactive month.
 - iv. There is at least one person who is a CMSP applicant and the person is not receiving a CMSP aid code.
3. Update the trigger conditions for the CMSP Discontinuance NOA rule **_950LrsCmspDiscontinuance** to add the new conditions below to the existing conditions (refer to Section 2.4.2.10 of CA-207384 Design document for the existing trigger conditions) to generate a discontinuance NOA when an individual was receiving CMSP benefits

in the previous month and now is receiving or continues receiving MC benefits in the current month.

- a. Generate a CMSP Discontinuance NOA when all the following is true:
 - i. The program type is Medi-Cal.
 - ii. The status of the program is 'Active'.
 - iii. The benefit month is after the CDM.
 - iv. There is at least one person who was receiving a CMSP aid code in the previous benefit month but no longer receiving a CMSP aid code in the current benefit month.

- 4. Update the generation conditions for the CMSP Eligible to Medi-Cal Denial Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_ELIGIBLE_TO_MC (7662)

Current Program(s): CMSP

Current Action Type: Denial

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

- a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is eligible to Medi-Cal.	Arial Font Size 10

- b. Update the current generation conditions to generate the fragment on a denial NOA when an individual did not receive CMSP benefits and has been approved for MC benefits:
 - i. The program type is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is not a retroactive month and is not after the CDM.
 - iv. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
 - v. The person is on the CMSP Income budget and has a Role Reason of 'Eligible to MC' on the CMSP budget.

- 5. Update the generation conditions for the CMSP Eligible to Medi-Cal Discontinuance Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_ELIGIBLE_TO_MC_M512 (7668)

Current Program(s): CMSP

Current Action Type: Discontinuance

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is eligible to Medi-Cal.	Arial Font Size 10

b. Update the current generation conditions to generate the fragment on a discontinuance NOA when an individual is no longer receiving CMSP benefits and has been approved for MC benefits:

- i. The program type is Medi-Cal.
- ii. The status of the person is 'Active'.
- iii. The benefit month is after the CDM.
- iv. The person was receiving a CMSP aid code in the previous month and is no longer receiving one in the current month.
- v. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
- vi. The person is on the CMSP Income budget and has a Role Reason of 'Eligible to MC' on the CMSP budget.

6. Update the generation conditions for the CMSP Eligible to Medi-Cal Retro Denial Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_ELIGIBLE_TO_MC (7714)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is eligible to Medi-Cal.	Arial Font Size 10

b. Update the current generation conditions to generate the fragment on a retro denial NOA when an individual did not receive CMSP benefits and has been approved for retro MC benefits:

- i. The program type is Medi-Cal.
- ii. The status of the person is 'Active'.

- iii. The benefit month is a retroactive month.
 - iv. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
 - v. The person is on the CMSP Income budget and has a Role Reason of 'Eligible to MC' on the CMSP budget.
7. Update the generation conditions for the CMSP FPL Exceed Income Reason fragment.

Reason Fragment Name: MC_DN_CMSP_OVER_INCOME (7652)

Current Program(s): CMSP

Current Action Type: Denial

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

- a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	Income exceeds 300% of the Federal Poverty Level.	Arial Font Size 10

- b. The reason fragment generates on the denial NOA when an individual is denied and there is a failed CMSP budget on the EDBC where the person is on the budget with a role reason of 'Over Income'. Update the current generation conditions to include the following conditions to generate the fragment on a denial NOA when an individual did not receive CMSP benefits due to over income, but has been approved for MC benefits:
 - i. The program type is Medi-Cal.
 - ii. The person status is 'Active'.
 - iii. The benefit month is not a retroactive month and not after the CDM.
 - iv. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
 - v. The person is on the failed CMSP budget and has a role reason of 'Over Income'.
8. Update the generation conditions for the CMSP FPL Exceed Income Retro Reason fragment.

Reason Fragment Name: MC_DN_CMSP_OVER_INCOME (7705)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	Income exceeds 300% of the Federal Poverty Level.	Arial Font Size 10

- b. Currently, the reason fragment generates on the retro denial NOA when an individual is denied for a retroactive month and there is a failed CMSP budget on the EDBC where the person is on the budget with a role reason of 'Over Income'. Update the current generation conditions to include the following conditions to generate the fragment on a retro denial NOA when an individual did not receive CMSP benefits due to over income, but has been approved for MC benefits:
- i. The program type is Medi-Cal.
 - ii. The person status is 'Active'.
 - iii. The benefit month is a retroactive month.
 - iv. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
 - v. The person is on the failed CMSP budget and has a role reason of 'Over Income'.

9. Update the generation conditions for the CMSP Fleeing Felon Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_FLEEING_FELON (7653)

Current Program(s): CMSP

Current Action Type: Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is a fleeing felon and is not eligible to receive CMSP.	Arial Font Size 10

- b. The reason fragment generates on the denial NOA when the person is denied, and the person is on a failed CMSP budget with a role reason of 'Fleeing Felon'. Update the current generation conditions to include the following conditions to generate the fragment on a denial NOA when an individual did not receive CMSP benefits due to the non-compliance, but has been approved for MC benefits:
- i. The program is Medi-Cal.

- ii. The person status is 'Active'.
- iii. The benefit month is not a retroactive month and not after the CDM.
- iv. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
- v. The person is on the failed CMSP budget and has a role reason of 'Fleeing Felon'.

10. Update the generation conditions for the CMSP Fleeing Felon Retro Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_FLEEING_FELON (7684)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is a fleeing felon and is not eligible to receive CMSP.	Arial Font Size 10

- b. The reason fragment generates on the retro denial NOA when the person is denied, and the person is on a failed CMSP budget with a role reason of 'Fleeing Felon'. Update the current generation conditions to include the following conditions to generate the fragment on a retro denial NOA when an individual did not receive CMSP benefits due to the non-compliance, but has been approved for MC benefits:
- i. The program is Medi-Cal.
 - ii. The person status is 'Active'.
 - iii. The benefit month is a retroactive month.
 - iv. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
 - v. The person is on the failed CMSP budget and has a role reason of 'Fleeing Felon'.

11. Update the generation conditions for the CMSP Fleeing Felon Discontinuance Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_FLEEING_FELON (7706)

Current Program(s): CMSP

Current Action Type: Discontinuance

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is a fleeing felon and is not eligible to receive CMSP.	Arial Font Size 10

- b. Currently, the reason fragment generates on the discontinuance NOA when the person is discontinued, and the person is on a failed CMSP budget with a role reason of 'Fleeing Felon'. Update the current generation conditions to include the following conditions to generate the fragment on a discontinuance NOA when an individual is no longer receiving CMSP benefits due to the non-compliance, but receiving MC benefits:
- i. The program is Medi-Cal.
 - ii. The person status is 'Active'.
 - iii. The benefit month is a retroactive month.
 - iv. There is a failed budget on the EDBC with the Medi-Cal Test Type of CMSP Income.
 - v. The person is on the failed CMSP budget and has a role reason of 'Fleeing Felon'.

12. Update the generation conditions for the CMSP Out of County Reason fragment.

Reason Fragment Name: MC_DN_CMSP_DOES_NOT_LIVE_IN_COUNTY (7654)

Current Program(s): CMSP

Current Action Type: Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	You are living in another county and do not plan to move to this county.	Arial Font Size 10

- b. The reason fragment generates on a denial NOA when the person is denied and there is a failed CMSP budget where the person has a role reason of 'Does Not Live in County (CMSP)'. Update the current generation conditions to include the

following conditions to generate the fragment on a denial NOA when an individual is not eligible for CMSP benefits but is receiving MC benefits.

- i. The program is Medi-Cal.
- ii. The status of the person is 'Active'.
- iii. The benefit month is not a retroactive month or not after the CDM.
- iv. There is a failed CMSP budget where the individual has a role reason of 'Does Not Live in County (CMSP)'.

13. Update the generation conditions for the CMSP Out of the County Retro Reason fragment.

Reason Fragment Name: MC_DN_CMSP_DOES_NOT_LIVE_IN_COUNTY (7707)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	You are living in another county and do not plan to move to this county.	Arial Font Size 10

- b. The reason fragment generates on a retro denial NOA when the person is denied and there is a failed CMSP budget where the person has a role reason of 'Does Not Live in County (CMSP)'. Update the current generation conditions to include the following conditions to generate the fragment on a denial NOA when a person is not eligible for CMSP benefits but is receiving MC benefits.
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is a retroactive month.
 - iv. There is a failed CMSP budget where the person has a role reason of 'Does Not Live in County (CMSP)'.

14. Update the generation conditions for the CMSP Verbal Withdrawal Reason fragment.

Reason Fragment Name:

MC_TN_DN_CMSP_VERBAL_REQUEST_DISC_M507 (7657)

Current Program(s): CMSP

Current Action Type: Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> verbally requested to withdraw his/her application.	Arial Font Size 10

- b. The reason fragment generates on a denial NOA when the person is denied and there is a failed CMSP budget where the person has a role reason of 'Requested Disc. (CMSP) – Verbal'. Update the current generation conditions to include the following conditions to generate the fragment on a denial NOA when a person is not eligible to CMSP but is receiving MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is not a retroactive month and not after the CDM.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'Requested Disc. (CMSP) – Verbal'.

15. Update the generation conditions for the CMSP Verbal Withdrawal Retro Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_VERBAL_REQUEST_DISC (7709)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> verbally requested to withdraw his/her application.	Arial Font Size 10

- b. The reason fragment generates on a retro denial NOA when the person is denied for a retroactive month and there is a failed CMSP budget where the person has a role reason of 'Requested Disc. (CMSP) – Verbal'. Update the current generation conditions to include the following conditions to

generate the fragment on a denial NOA when a person is not eligible to CMSP but is receiving MC benefits:

- i. The program is Medi-Cal.
- ii. The status of the person is 'Active'.
- iii. The benefit month is a retroactive month.
- iv. There is a failed CMSP budget where the person has as a role reason of 'Requested Disc. (CMSP) – Verbal'.

16. Update the generation conditions for the CMSP County Residence Reason fragment.

Reason Fragment Name:

MC_TN_CMSP_MOVED_OUT_OF_COUNTY_M500 (7650)

Current Program(s): CMSP

Current Action Type: Discontinuance

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> has moved out of the county.	Arial Font Size 10

b. The reason fragment currently generates on a discontinuance when a person is discontinued and there is a failed CSMP budget where the person has a role reason of 'Moved Out of County (CMSP)'. Update the current generation conditions to include the following conditions to generate the fragment on a discontinuance NOA when a person is not eligible to CMSP but is still receiving MC benefits:

- i. The program is Medi-Cal.
- ii. The status of the person is 'Active'.
- iii. The benefit month is after the CDM.
- iv. There is a failed CMSP budget where the person has as a role reason of 'Moved Out of County (CMSP)'.

17. Update the generation conditions for the CMSP Failed to Provide Verifications Reason fragment.

Reason Fragment Name: MC_DN_CMSP_FTP_VERIF (7658)

Current Program(s): CMSP

Current Action Type: Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	We asked you to bring verifications we need to make a decision about your application of eligibility for CMSP. You did not bring in the verifications we asked you for.	Arial Font Size 10

- b. The reason fragment generates on a denial NOA when a person is denied and there is a failed CMSP budget where the person has a role reason of 'FTP Verification (CMSP)'. Update the current generation conditions to include the following conditions to generate the fragment on a denial NOA when a person is not eligible to CMSP but receives MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is not a retroactive month and not after the CDM.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'FTP Verification (CMSP)'.

18. Update the generation conditions for the CMSP Failed to Provide Verifications Retro Reason fragment.

Reason Fragment Name: MC_DN_CMSP_FTP_VERIF (7710)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	We asked you to bring verifications we need to make a decision about your application of eligibility for CMSP. You did not bring in the verifications we asked you for.	Arial Font Size 10

- b. The reason fragment generates on a retro denial NOA when a person is denied for a retroactive month and there is a failed CMSP budget where the person has a role reason of 'FTP Verification (CMSP)'. Update the current generation conditions to include the following conditions to generate the fragment on a retro denial NOA when a person is not eligible to CMSP but receives MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.

- iii. The benefit month is a retroactive month.
- iv. There is a failed CMSP budget where the person has as a role reason of 'FTP Verification (CMSP)'.

19. Update the generation conditions for the CMSP Didn't Apply for OHC Reason fragment.

Reason Fragment Name: MC_DN_CMSP_DID_NOT_APPLY_OHC (7660)
Current Program(s): CMSP
Current Action Type: Denial
Existing Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> did not apply for Other Health Care Coverage.	Arial Font Size 10

- b. The reason fragment currently generates on a denial NOA when a person is a CMSP applicant and is denied for reason of 'Didn't Apply OHC'. Update the current generation conditions to add the following conditions to generate the fragment on a denial NOA when a person is not eligible to CMSP due to the 'Didn't Apply for Other Health Care (CMSP)' non-compliance but receives MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is not a retroactive month and not after the CDM.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'Didn't Apply OHC'.

20. Update the generation conditions for the CMSP Didn't Apply for OHC Retro Reason fragment.

Reason Fragment Name: MC_DN_CMSP_DID_NOT_APPLY_OHC (7712)
Current Program(s): CMSP
Current Action Type: Retro Denial
Existing Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> did not apply for Other Health Care Coverage.	Arial Font Size 10

b. The reason fragment currently generates on a retro denial NOA when a person is a CMSP applicant and is denied for reason of 'Didn't Apply OHC'. Update the current generation conditions to add the following conditions to generate the fragment on a retro denial NOA when a person is not eligible to CMSP due to the 'Didn't Apply for Other Health Care (CMSP)' non-compliance but receives MC benefits:

- i. The program is Medi-Cal.
- ii. The status of the person is 'Active'.
- iii. The benefit month is a retroactive month.
- iv. There is a failed CMSP budget where the person has as a role reason of 'Didn't Apply OHC'.

21. Update the generation conditions for the CMSP Failed to Enroll/Pay APTC Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_FAILD_ENROLL_PAY_APTC (7665)

Current Program(s): CMSP

Current Action Type: Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> did not provide proof of enrollment in or payment of premiums for a Covered CA Insurance Plan.	Arial Font Size 10

b. The reason fragment currently generates on a denial NOA when a person is a CMSP applicant and is denied for reason of 'Failure to Enroll/Pay APTC Premiums'. Update the current generation conditions to add the following conditions to generate the fragment on a denial NOA when a person is not eligible to CMSP due to the 'Failure to Enroll/Pay APTC Premiums' non-compliance but receives MC benefits:

- i. The program is Medi-Cal.
- ii. The status of the person is 'Active'.
- iii. The benefit month is not a retroactive month and not after the CDM.

- iv. There is a failed CMSP budget where the person has as a role reason of 'Failure to Enroll/Pay APTC Premiums'.

22. Update the generation conditions for the CMSP Failed to Enroll/Pay APTC Retro Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_FAILD_ENROLL_PAY_APTC (7717)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

- a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> did not provide proof of enrollment in or payment of premiums for a Covered CA Insurance Plan.	Arial Font Size 10

- b. The reason fragment currently generates on a retro denial NOA when a person is a CMSP applicant and is denied for reason of 'Failure to Enroll/Pay APTC Premiums' for a retroactive month. Update the current generation conditions to add the following conditions to generate the fragment on a retro denial NOA when a person is not eligible to CMSP due to the 'Failure to Enroll/Pay APTC Premiums' non-compliance but receives MC benefits for a retroactive month:
 - i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is a retroactive month.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'Failure to Enroll/Pay APTC Premiums'.

23. Update the generation conditions for the CMSP Failed to Pay APTC Discontinuance Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_FAILD_ENROLL_PAY_APTC (7689)

Current Program(s): CMSP

Current Action Type: Discontinuance

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> did not provide proof of enrollment in or payment of premiums for a Covered CA Insurance Plan.	Arial Font Size 10

- b. The reason fragment currently generates on a discontinuance NOA when a person is discontinued from CMSP for the reason of 'Failure to Enroll/Pay APTC Premiums'. Update the current generation conditions to add the following conditions to generate the fragment on a discontinuance NOA when a person is no longer receiving CMSP benefits due to the 'Failure to Enroll/Pay APTC Premiums' non-compliance but is still receiving MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is after the CDM.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'Failure to Enroll/Pay APTC Premiums'.

24. Update the generation conditions for the CMSP Gets APTC Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_GETS_APTC (7667)

Current Program(s): CMSP

Current Action Type: Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is receiving an Advanced Premium Tax Credit.	Arial Font Size 10

- b. The reason fragment currently generates on a denial NOA when a person is a CMSP applicant and there is a failed CMSP budget where the person has a role reason of 'Gets APTC'. Update the current generation conditions to add the following conditions to generate the fragment on a denial NOA when a person is not eligible to CMSP but receives MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is not a retroactive month and not after the CDM.

- iv. There is a failed CMSP budget where the person has as a role reason of 'Gets APTC'.

25. Update the generation conditions for the CMSP Gets APTC Retro Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_GETS_APTC (7719)
Current Program(s): CMSP
Current Action Type: Retro Denial
Existing Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese

- a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is receiving an Advanced Premium Tax Credit.	Arial Font Size 10

- b. The reason fragment currently generates on a retro denial NOA when a person is a CMSP applicant and there is a failed CMSP budget where the person has a role reason of 'Gets APTC'. Update the current generation conditions to add the following conditions to generate the fragment on a retro denial NOA when a person is not eligible to CMSP but receives MC benefits:
 - i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is a retroactive.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'Gets APTC'.

26. Update the generation conditions for the CMSP Gets APTC Discontinuance Reason fragment.

Reason Fragment Name: MC_TN_DN_CMSP_GETS_APTC (7691)
Current Program(s): CMSP
Current Action Type: Discontinuance
Existing Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> is receiving an Advanced Premium Tax Credit.	Arial Font Size 10

- b. The reason fragment currently generates on a discontinuance NOA when a person is discontinued from CMSP and there is a failed CMSP budget where the person has a role reason of 'Gets APTC'. Update the current generation conditions to add the following conditions to generate the fragment on a retro denial NOA when a person is no longer receiving CMSP benefits but still receiving MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is after the CDM.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'Gets APTC'.

27. Update the generation conditions for the CMSP Failed to Cooperate with the MC Process Reason fragment.

Reason Fragment Name: MC_DN_CMSP_DID_NOT_COOPERATE_MC (7681)

Current Program(s): CMSP

Current Action Type: Denial

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

a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> failed to cooperate with the Medi-Cal process.	Arial Font Size 10

- b. The reason fragment currently generates on a denial NOA when a person is a CMSP applicant and is denied for reason of 'Didn't Coop w. MC Linkage.' Update the current generation conditions to add the following conditions to generate the fragment on a denial NOA when a person is not eligible to CMSP due to the 'Didn't Cooperate with Medi-Cal Linkage (CMSP)' non-compliance but receives MC benefits:
- i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is not a retroactive month and not after the CDM.

- iv. There is a failed CMSP budget where the person has as a role reason of 'Didn't Coop w. MC Linkage.'

28. Update the generation conditions for the CMSP Failed to Cooperate with the MC Process Retro Reason fragment.

Reason Fragment Name: MC_DN_CMSP_DID_NOT_COOPERATE_MC (7731)

Current Program(s): CMSP

Current Action Type: Retro Denial

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

- a. The reason fragment has the current verbiage:

Description	Text	Formatting
Static	<PersonName> failed to cooperate with the Medi-Cal process.	Arial Font Size 10

- b. The reason fragment currently generates on a retro denial NOA when a person is a CMSP applicant and is denied for reason of 'Didn't Coop w. MC Linkage.' Update the current generation conditions to add the following conditions to generate the fragment on a retro denial NOA when a person is not eligible to CMSP due to the 'Didn't Cooperate with Medi-Cal Linkage (CMSP)' non-compliance but receives MC benefits for a retroactive month:
 - i. The program is Medi-Cal.
 - ii. The status of the person is 'Active'.
 - iii. The benefit month is a retroactive month.
 - iv. There is a failed CMSP budget where the person has as a role reason of 'Didn't Coop w. MC Linkage.'

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1062	The CONTRACTOR shall add the CMSP program specific fragments as part of Migration.	62 CMSP NOA Fragments will be migrated.	Updated the trigger conditions to generate denial and discontinuance CMSP NOAs. Also, updated the generation conditions of the reason fragments to generate on the CMSP denial and discontinuance NOAs.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216162 | DDID 1967,1955

Updates to Automated Tasks for MEDS Alerts

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas, Justin Dobbs
	Reviewed By	Justin Dobbs, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/20/2020	1.0	Initial Revision	Mayuri Srinivas
9/28/2020	1.1	Updated design document based on Deliverable comments.	Mayuri Srinivas

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1 OVERVIEW

This design outlines modifications to the MEDS Alert Admin Detail page to incorporate functionality for counties to configure automated Task attributes based on MEDS Alerts. Reference the CA-210615 design document for specifics of the MEDS Alert Admin Detail page.

1.1 Current Design

The Medi-Cal Eligibility Data System (MEDS) outbound interface and online transactions sent to MEDS often generate MEDS Alert records in response. These MEDS Alert records are sent from MEDS to LRS/CalSAWS using the MEDS Alert inbound interface. A MEDS Alert record contains an exception, a fatal and/or non-fatal error or warning, etc., that should be addressed by the county.

CA-210615 introduces functionality that allows individual counties to enable or disable MEDS Alerts and/or the associated automated Tasks.

1.2 Requests

Modify the Task Information section of the MEDS Alert Admin Detail page to allow for more configurability other than just enabling/disabling the Task.

1.3 Overview of Recommendations

1. Update the Task Information section of the MEDS Alert Admin Detail page to offer a level of MEDS Alert Task configurability similar to the Task Information section available on the Automated Action Detail page per CA-214928 (DDID 34).

1.4 Assumptions

1. CA-210615 that introduces the MEDS Alert Admin Detail page will be available in the LRS/CalSAWS System with the same release or prior to the deployment of this enhancement.
2. Existing functionality will remain unchanged unless it is mentioned in the Description of Changes section below.

2 RECOMMENDATIONS

This section will describe the modifications that are necessary to update the Task Information section of the MEDS Alert Admin Detail page to offer more configurability.

2.1 MEDS Alert Admin Detail Page

2.1.1 Overview

The MEDS Alert Admin Detail page displays configuration information of MEDS Alerts in the LRS/CalSAWS System. A population of MEDS Alerts available on this page include a Task Information section that allow users to enable or disable the creation of a Task for these MEDS Alerts. The remaining MEDS Alerts do not include a Task Information section at all on this page. This section will describe recommendations needed to stage the configurability of automated Tasks for every MEDS Alert available on the MEDS Alert Admin Detail page. The section will also describe modifications to the Task Information section to allow for more configuration other than just enabling and disabling the Task.

2.1.2 MEDS Alert Admin Detail Page Mockup

MEDS Alert Admin Detail

*- Indicates required fields

Edit Close

MEDS Alert Information

Alert ID: 9004	Alert Description: ACTIVE MEDI-CAL RECIPIENT - DECEASED PER SSA BUY-IN
Alert Type: PRI-ALT	Alert Status: Active

Case Update Information

Case Update: Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCI and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).	Case Update Status: * Active
---	--

Journal Entry:
On {fileRunDate}, {Deceased Individual Name} - {CIN} was matched to the {agencyName} file as he/she is deceased as of {deceasedDate}.

Task Information

Type: Head of Household/Case Payee Deceased	Sub-Type:	Status: * Inactive
Due Date: Default Due Date	Default Due Date: 10 Days	
Initial Assignment: Default Assignment	Default Assignment: MEDS Alert Task Distribution	

Long Description:
{Deceased Individual Name} died on {deceasedDate}. Please take appropriate action to change the case payee.

History

No Data Found

Edit Close

2.1.2.1 – MEDS Alert Admin Detail Page Reference: View Mode

MEDS Alert Admin Detail

* - Indicates required fields

MEDS Alert Information

Alert ID: 9004	Alert Description: ACTIVE MEDI-CAL RECIPIENT - DECEASED PER SSA BUY-IN
Alert Type: PRI-ALT	Alert Status: Active

Case Update Information

Case Update: Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCI and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).	Case Update Status: * Active
Journal Entry: On {fileRunDate}, {Deceased Individual Name} - {CIN} was matched to the {agencyName} file as he/she is deceased as of {deceasedDate}.	

Task Information

Type: Head of Household/Case Payee Deceased ▾	Sub-Type: ▾	Status: * Active ▾
Due Date: Default Due Date ▾	Default Due Date: 10 Days	
Initial Assignment: Default Assignment ▾	Default Assignment: MEDS Alert Task Distribution	
Long Description: {Deceased Individual Name} died on {deceasedDate}. Please take appropriate action to change the case payee.		

▶ History

Figure 2.1.2.2 – MEDS Alert Admin Detail Page Reference: Edit Mode

2.1.3 Description of Changes

1. Update the Task Information Section of the MEDS Alert Admin Detail page as follows:
 - a. Update the Task Type field to editable when the page is in Edit mode. This field will display a dropdown list containing Task Types that are available for the county. This field will be required

and enforced with a page validation message when the "Status" field in this section is set to "Active". When the page is in View mode, this field will display the Task Type associated to the MEDS Alert if one has been selected, otherwise this field will be blank. Page Validations can be found in Section 2.1.4.

- b. Add an optional Task Sub-Type field called "Sub-Type:" that will display if the selected Task Type contains one or more Task Sub-Type values. This field will display a dropdown list containing Task Sub-Types associated to the selected Task Type when the page is in Edit mode. When the page is in View mode, this field will display the Task Sub-Type associated to the MEDS Alert if one has been selected, otherwise the entire field, including the label, will not display.
- c. Update the label of the "Task Status:" field to be "Status:". This recommendation is strictly cosmetic and will not change the values available in this field or the underlying functionality.
- d. Modify the existing Due Date field to display the following two fields that will allow configuration of the Task Due Date:
 - i. Due Date – This field will drive a dynamic field which will be referenced in this document as "Due Date Details" below.

This field will display the value of the Due Date field when the page is in View mode. When the page is in Edit mode, this field will display as a dropdown list containing the following options available for the determination of the Task due date:

 1. Default Due Date – Will set the due date to the default value specified for the MEDS Alert Task.
 2. After Number of Calendar Days – Will set the due date based on the System date plus the number of calendar days specified by the User.
 3. After Number of Business Days – Will set the due date based on the System date plus the number of business days specified by the User. Business days exclude weekends and County specific holidays.
 4. Last Day of Month – Will set the due date to the last calendar day of the month of the System date.
 5. Last Day of Following Month - Will set the due date to the last calendar day of the month following the month of the System date.
 - e. Due Date Details – This references the section on the page to the right of the "Due Date" field. This section will display field(s) dynamically based on the value chosen in the Due Date field. The table below describes the fields that will display dynamically for each option available in the Due Date field.

Due Date Value	Due Date Details Will Display
Default Due Date	A "Default Due Date" field will display. The field value contains text to describe the value for how logic will determine the Due Date. Example values are "5 days" or "10 days".
After Number of Calendar Days	A required "Number of Calendar Days" field will display. The input value must be a number from 0 – 999.
After Number of Business Days	A required "Number of Business Days" field will display. The input value must be a number from 0 – 999.

- f. Add the following fields to allow configuration of the assignment rules of the MEDS Alert Task:
- i. Initial Assignment – When the page is in View mode, this field will display the selected Initial Assignment value. When the page is in Edit mode, this field will display a dropdown that allows the User to choose the method for how Tasks generated by the MEDS Alert are assigned. Options included are:
 1. Default Assignment – Will assign the Task based on the default value that is available for the MEDS Alert Task.
 2. Case Carrying Worker/Bank – Will allow the user to add specific instructions regarding assignment to the Case Carrying Worker or Bank.
 Note: Current LRS/CalSAWS System logic evaluates for a "Case Carrying Worker" as part of the Office Distribution assignment logic. The Case Carrying Worker is found by evaluating a hierarchy of all programs on the Case. The worker associated to the highest priority program on the Case is considered the Case Carrying Worker.
 - ii. If the Initial Assignment value is "Default Assignment", a "Default Assignment" field will display containing a read only description of the default assignment method. MEDS Alerts Tasks will have a Default Assignment value of "MEDS Alert Task Distribution". This term describes the current assignment logic in place to assign MEDS Alert Tasks in the LRS/CalSAWS System. If the MEDS Alert Task is being created for Los Angeles County, this logic will

initially perform a lookup for a specific Office if the MEDS Alert is a ZZZ Alert or related to a Case with a Foster Care, Kin-Gap or Adoption Assistance Program; otherwise the Office associated to the MEDS Alert will be used. This Office will be evaluated to find a Position within the Office that has been configured to receive MEDS Alert Tasks. A Position can receive MEDS Alert Tasks if the Position Detail page has a checkmark in the "MEDS Alert" box of the "Tasks" section of the page.

If the Initial Assignment value is "Case Carrying Worker/Bank", the following 2 fields will display:

Initial Assignment: Case Carrying Worker/Bank ▼	Case Carrying Worker: Most Recent Worker ▼
	Default Bank ID: <input type="text"/> Select

1. Case Carrying Worker – This field will display the Case Carrying Worker value when the page is in View mode. If the page is in Edit mode, this field will display a dropdown box with the following options:

- Currently Assigned Worker
- Most Recent Worker Within 30 Days
- Most Recent Worker Within 60 Days
- Most Recent Worker Within 90 Days
- Most Recent Worker Within 120 Days
- Most Recent Worker
- No Case Carrying Worker

The options above will apply the appropriate rules to the Case Carrying Worker during the Task Assignment. For Example, if the Case Carrying Worker value is "Most Recent Worker Within 30 Days", the highest priority program on the Case will be evaluated to find the most recently assigned worker within the last 30 days.

2. Default Bank ID – This field will display the Default Bank ID value when the page is in View mode. If the page is in Edit mode, this field will display a text box and a "Select" BUTTON that will navigate to the Select Bank page allowing the User to search for and select a Bank. If a worker cannot be determined from the Case Carrying Worker rule, the Task will be assigned to the Bank specified in this field. If a Worker or a Bank cannot be

determined for assignment, the Task will not be created.

- g. Long Description – A text field indicating the long description that will be used when the Task is created. This field will not be modified and will remain read only.
 - h. Remove the Expiration Date field from the page. Expiration Date information will be housed and configurable on the Task Type Detail page per DDID 34 (CA-214928). The Task Type Detail page can be referenced for any attributes related to the selected Task Type.
 - i. Each of the editable fields within the Task Information section will create the appropriate transactions to be displayed in the History section of the page if the values are modified. For Example, if the “Type” within the Task Information section is changed from “Value One” to “Value Two”, the History section of the page will display the appropriate information for this change.
2. Configure MEDS Alerts that currently display the Task Information section to have appropriate default values for the new fields being added in the above recommendation. This recommendation will not change current functionality or logic of these MEDS Alert Tasks. The following are the initial editable values for the 14 MEDS Alert Tasks:

Note: Long Description is not included because the value is not editable. Status is also not included because the value will not be changed and users can change this field currently today, so the value that is available in the Status field will remain.

Alert ID	Alert Description	Task Information Attributes
1503	CLIENT INDEX NUMBER/MEDS-ID CONFLICT	<ul style="list-style-type: none"> • Type: 1503- Client Index Number/MEDS-ID conflict • Sub-Type: null • Due Date: Default Due Date • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
1504	CLIENT INDEX NUMBER/MEDS-ID CS COUNTY-	<ul style="list-style-type: none"> • Type: 1504-CIN/MEDS ID County-ID/MEDS conflict • Sub-Type: null • Due Date: Default Due Date

Alert ID	Alert Description	Task Information Attributes
	ID/MEDS-ID CONFLICT	<ul style="list-style-type: none"> • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
1510	TRANSACTION FAILED MEDS NAME/BIRTHDATE MATCH CRITERIA	<ul style="list-style-type: none"> • Type: 1510- Transaction Failed Meds Name/Birthdate match criteria • Sub-Type: null • Due Date: Default Due Date • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
2005	TRANSACTION COUNTY-ID DOES NOT MATCH MEDS	<ul style="list-style-type: none"> • Type: 2005-Transaction County ID does not match MEDS • Sub-Type: null • Due Date: Default Due Date • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
2130	DECEASED PER MEDS – CONTACT YOUR MEDS LIASON	<ul style="list-style-type: none"> • Type: Head of Household/Case Payee Deceased • Sub-Type: null • Due Date: Default Due Date • Default Due Date: 10 Days • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
6005	RECON RECORD ON MEDS/NOT ON COUNTY – RECON HOLD GENERATED	<ul style="list-style-type: none"> • Type: 6005- Recon record on MEDS/Not on County recon hold generated • Sub-Type: null • Due Date: Default Due Date • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal

Alert ID	Alert Description	Task Information Attributes
		<p>period or else the Task is due the first day of the following renewal period.</p> <ul style="list-style-type: none"> Initial Assignment: Default Assignment Default Assignment: MEDS Alert Task Distribution
6006	DUP RECORDS ON COUNTY RECON FILE – RECON HOLD GENERATED	<ul style="list-style-type: none"> Type: 6006- Dup records on County Recon file Recon hold generated Sub-Type: null Due Date: Default Due Date Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. Initial Assignment: Default Assignment Default Assignment: MEDS Alert Task Distribution
6008	DUP RECORDS ON COUNTY RECON FILE – NO MATCH ON MEDS	<ul style="list-style-type: none"> Type: 6008-Dup records on County Recon file. No Match on MEDS. Sub-Type: null Due Date: Default Due Date Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. Initial Assignment: Default Assignment Default Assignment: MEDS Alert Task Distribution
9003	DEATH REPORTED TO MEDS – MEDS/CDB ELIGIBILITY TERMINATED	<ul style="list-style-type: none"> Type: Head of Household/Case Payee Deceased Sub-Type: null Due Date: Default Due Date Default Due Date: 10 Days Initial Assignment: Default Assignment Default Assignment: MEDS Alert Task Distribution
9004	ACTIVE MEDI-CAL RECIPIENT - DECEASED PER SSA BUY-IN	<ul style="list-style-type: none"> Type: Head of Household/Case Payee Deceased Sub-Type: null Due Date: Default Due Date Default Due Date: 10 Days Initial Assignment: Default Assignment Default Assignment: MEDS Alert Task Distribution
9532	OVER 3 EDWARDS MONTHS – MEDI-CAL	<ul style="list-style-type: none"> Type: 9532- Over 3 edwards Months Medi_CAL determination overdue criteria Sub-Type: null Due Date: Default Due Date

Alert ID	Alert Description	Task Information Attributes
	DETERMINATION OVERDUE	<ul style="list-style-type: none"> • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
9546	OVER 2 MONTHS ACCEL/PE ENROLL – AP DETERMIANTION OVER DUE	<ul style="list-style-type: none"> • Type: 9546- Over 2 months Accel App Determination overdue • Sub-Type: null • Due Date: Default Due Date • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
9548	OVER 2 MONTHS EXTENDED ELIG – MEDI-CAL DETERM OVERDUE	<ul style="list-style-type: none"> • Type: 9548- Over 2 months Extended Elig – MEDI-CAL determ overdue • Sub-Type: null • Due Date: Default Due Date • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution
9550	ONGOING BURMAN ELIGIBLE – MEDS ELIGIBILITY UPDATE OVERDUE	<ul style="list-style-type: none"> • Type: 9550- Ongoing Burman Eligible MEDS Eligibility Update overdue • Sub-Type: null • Due Date: Default Due Date • Default Due Date: If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the Task is due the first day of the following renewal period. • Initial Assignment: Default Assignment • Default Assignment: MEDS Alert Task Distribution

- Update the Long Description of the following MEDS Alert Tasks to no longer reference "LRS":

Alert ID	Current Long Description	Updated Long Description
1503	There is a discrepancy in MEDS or LRS involving the SSN associated with the CIN	There is a discrepancy with MEDS involving the SSN associated with the CIN.
1504	There is a data discrepancy On MEDS and LRS involving the SSN or CIN	There is a data discrepancy with MEDS involving the SSN or CIN.
1510	There is a data discrepancy On MEDS and LRS involving the name and birthdate	There is a data discrepancy with MEDS involving the name and birthdate.
2005	There is a data discrepancy between MEDS and LRS involving the County ID	There is a data discrepancy with MEDS involving the County ID.
9003, 9004, 2130	{Deceased Individual Name} died on {deceasedDate}. Please take appropriate action to change the case payee in the LRS.	{Deceased Individual Name} died on {deceasedDate}. Please take appropriate action to change the case payee.
6005	A MEDS record does not have a matching record on LRS but there has been activity on MEDS within the last six months that affects the person share of cost or eligibility status	A MEDS record cannot be matched but there has been activity on MEDS within the last six months that affects the person share of cost or eligibility status.
6006, 6008	LRS displays more than one record with the same MEDS ID (SSN) and there is a matching record on MEDS.	There is more than one record with the same MEDS ID (SSN) and there is a matching record on MEDS.
9550	A beneficiary has been placed in a forced eligibility status from a MEDS hold for more than one month. This generally as a result of data discrepancy between MEDS and LRS	A beneficiary has been placed in a forced eligibility status from a MEDS hold for more than one month. This generally as a result of data discrepancy with MEDS.

- Enable the Task Information section with default values for all MEDS Alerts that do not currently display the Task Information section.

- a. The "Status" will be initially set to "Inactive".
- b. The Task Type and Task Sub-Type values will initially be set to blank. If a user updates the Status field in this section to be "Active", page validation will enforce the selection of a Task Type value. This approach will allow each county to specify a county specific Task Type as needed rather than a prescribed Task Type. Page Validations can be found in Section 2.1.4.
- c. The Long Description that will be associated to each of these tasks will be:
 - MEDS Alert {Alert ID} – {Alert Description} has been received.

For example: If a Task is created for MEDS Alert 0515, the Text Description will display as "MEDS Alert 0515 – INVALID PRIMARY LANGUAGE CODE has been received."

- d. The remaining attributes within the section will be initially configured as follows:
 - i. Due Date: Default Due Date
 - ii. Default Due Date: 10 Days
 - iii. Initial Assignment: Default Assignment
 - iv. Default Assignment: MEDS Alert Task Distribution
5. Update the MEDS Alert processing logic that evaluates the MEDS Alert Admin Detail page Task Information section to function for each MEDS Alert that is accessible on the MEDS Alert Admin Detail page. This modification is necessary so that the Task Information section being introduced in recommendation #4 for MEDS Alerts that don't currently have this section will also be evaluated during the MEDS Alert processing.
 6. **Technical:** Update the data model supporting the MEDS Alert Admin Detail page to link to the TASK_TYPE table to retrieve the appropriate attributes for the page that are associated to a specific Task Type. This data link will need to initially be loaded for the 14 MEDS Alerts that currently display the Task Information section. Similarly, the default due date information will be housed in the appropriate reference column in the codes table for Category 399.

2.1.4 Page Validations

1. "Type – A Task Type must be selected."
 - a. Updating the Task Information section of the MEDS Alert Admin Detail page to have a Status of "Active" will display a validation message on Save when a Task Type has not been selected.

2. "Number of Calendar Days - Value must be a number from 0 – 999. Please enter a different value."
 - a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Calendar Days field, a validation message is triggered.
3. "Number of Business Days - Value must be a number from 0 – 999. Please enter a different value."
 - a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Business Days field, a validation message is triggered.
4. "Default Bank ID – Bank ID does not exist."
 - a. Add a validation to display when the User attempts to save the page with the Bank ID field populated with an ID that does not correspond to an existing Bank in the LRS/CalSAWS System.
5. "Program Worker – Tasks must be assigned to a Position or a Bank."
 - a. Add a validation to display when the User attempts to save the page with "No Program Worker" selected in the Program Worker field, and no Bank ID populated in the Bank ID field.

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** MEDS Alert Admin > Search for an Alert > Click on the desired results from the List page to navigate to the MEDS Alert Admin Detail page

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

Implement page mapping for the Task Information section of the MEDS Alert Admin Detail page.

2.1.8 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<ul style="list-style-type: none"> - Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones. 	<p>The MEDS Alert Admin Detail page will be modified to allow configuration of MEDS Alert Task information by each county.</p>
1955	<p>The CONTRACTOR shall create automated tasks for MEDS alerts specified in the "MEDS Alert Message Inventory" appendix, that are received by the CalSAWS Software and do not generate tasks currently. The</p>	<ul style="list-style-type: none"> - This requirement will be met with the implementation of DDID 1964 and Automated Action SCR associated with from DDID 1967. 	<p>The MEDS Alert Admin Detail page will be modified to allow configuration of MEDS Alert Task</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>automated tasks from MEDS alerts must be county configurable to allow authorized users to enable or disable the individual tasks.</p>	<p>- Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'MEDS Alert Message Inv'</p>	<p>information by each county.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216568 | DDID 1787 and 1789

Migrate C-IV County Specific Batch Jobs

(Phase 5)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/14/2020	1.0	Initial Revision	Duke Vang
9/16/2020	1.1	Minor updates based on QA comments	Duke Vang
10/1/2020	1.2	Adding new batch section	Avi Bandaranayake
10/21/2020	1.3	Design clarification on batch jobs numbers and obsoleted recommendations	Duke Vang

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1 OVERVIEW

1.1 Current Design

There are approximately 21 different Issuance Batch Sweeps in LRS/CalSAWS. Some of these batch sweeps run daily whereas some run monthly. These batch sweeps target authorization records (EDBC, Payment Request, and Recovery Account Refund) for all programs where Customers are eligible to benefits or Supportive Service Payments.

There are a set of core Issuance Creation Batch jobs that create issuance records based on the authorization records identified by the Issuance Batch Sweeps. The Daily (PBXXF101) and Monthly (PBXXF100) Issuance County Batch job are the preamble to all the Issuance Batch Sweep jobs and tells the core Issuance Creation Batch jobs if the issuances will be created as supplemental benefits or main payroll benefits.

The following migration SCRs have migrated/merged C-IV County specific batch jobs from the C-IV code base into LRS/CalSAWS in previous releases:

- CA-210771
- CA-207250
- CA-210772
- CA-213659

1.2 Requests

Per Design Differences ID 1787 and 1789, C-IV County specific batch jobs are to be migrated or merged into CalSAWS. As a guiding principle, the C-IV Counties will adopt any existing CalSAWS batch jobs whenever possible. This design will be phase 5 of that effort.

1.3 Overview of Recommendations

1. The current Nightly Foster Care EDBC Sweep job (PB00F304) and Future Month Supplemental Sweep Job (PB00F308) will be updated to be Los Angeles County only jobs.
2. The C-IV version of the Nightly Foster Care EDBC Sweep job (PB00F304) and Future Month Supplemental Sweep Job (PB00F308) will be migrated into CalSAWS and be made applicable to the 57 Migration Counties.
3. The current Monthly Issuance County batch job (PBXXF100) will be updated to indicate separate Nightly and Main Payroll authorization records for Foster Care (FC), Kin-GAP (KG), Adoption Assistance Program (AAP), and all other cash programs issuance sweep jobs.

1.4 Assumptions

1. The following CalSAWS batch modules and batch jobs will be adopted as is by the C-IV and CalWIN Migration Counties. No batch property changes will be required since these are County 00 jobs:
 - a. org.civ.bsd.issuance.batch.MonthlyIssuanceSweepBatch (PB00F300)
 - b. org.civ.bsd.issuance.batch.IssuanceBalancerBatch (PB00F301)
 - c. org.civ.bsd.issuance.batch.NightlyEDBCSweepBatch (PB00F302)
 - d. org.civ.bsd.issuance.batch.NightlyNonFCEDBCSweepBatch (PB00F303)
 - e. org.civ.bsd.issuance.batch.NightlyPmtReqSweepBatch (PB00F305)
 - f. org.civ.bsd.issuance.batch.NightlyRecoveryAccountSweepBatch (PB00F306)
 - g. org.civ.bsd.issuance.batch.NightlyExpungementSweepBatch (PB00F307)
 - h. org.civ.bsd.issuance.batch.BatchCountyTransactCleanUpBatch (PB00F309)
 - i. org.civ.bsd.batch.recoveryaccount.UncollectibleRecoveryAccount (PB00F310)
 - j. org.civ.bsd.issuance.batch.NightlyWINSSweepBatch (PB00F311)
 - k. org.civ.bsd.issuance.batch.NightlySUASSweepBatch (PB00F312)
 - l. org.civ.bsd.issuance.batch.MonthlyWINSSweepBatch (PB00F313)
 - m. org.civ.bsd.issuance.batch.MonthlyIssuanceSweepBatch (PB00F314)
 - n. org.civ.bsd.issuance.batch.MonthlyIssuanceSweepBatch (PB00F315)
 - o. org.civ.bsd.issuance.batch.MonthlyIssuanceSweepBatch (PB00F316)
 - p. org.civ.bsd.issuance.batch.NightlyEDBCSweepBatch (PB00F318)
 - q. org.civ.bsd.issuance.batch.NightlyNonFCEDBCSweepBatch (PB00F319)
 - r. org.civ.bsd.issuance.batch.NightlyNBEDBCSweepBatch (PB00F324)
 - s. org.civ.bsd.issuance.batch.FutureMonthSupplementalINBSweepBatch (PB00F325)
2. The following CalSAWS batch jobs only impact Los Angeles County and no changes are required:
 - a. PB19F313 – Foster Care Stop Payment Sweep
 - b. PB19F321 to PB19F323 – GR Issuance Batch Sweeps
3. The following C-IV batch jobs will not be migrated into CalSAWS:
 - a. PB00F314 – Foster Care Main Payroll Sweep
 - b. PBXXF102 – Foster Care Daily Issuance County batch job

Note: The C-IV Counties will inherit the CalSAWS Foster Care Main Payroll Sweeps and batch jobs (PB00F314 and PBXXF102). Hence their version of the Foster Care Main Payroll batch jobs will not be migrated.

4. Authorization records for the C-IV General Assistance (Managed) program will be picked up in all the existing Non-Foster Care issuance sweep batch jobs.
5. All migration county batch scheduling changes will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2 RECOMMENDATIONS

2.1 Issuance Batch Sweeps (PB00F304 and PB00F308)

2.1.1 Overview

The following existing CalSAWS batch modules and batch sweep jobs will be updated to be Los Angeles County specific. Similar batch sweeps will be migrated from the C-IV code base into CalSAWS and be made available to the 57 Migration Counties:

1. org.civ.bsd.issuance.batch.NightlyFCEDBCSweepBatch (PB00F304)
2. org.civ.bsd.issuance.batch.FutureMonthSupplementalSweepBatch (PB00F308)

2.1.2 Description of Change

1. Update the batch job number for the following existing issuance batch sweeps jobs to be Los Angeles County specific (i.e. County 19):
 - a. PB00F304 → PB19F304
 - b. PB00F308 → PB19F326
2. Update the batch properties of the batch jobs from recommendation 2.1.2.1 to be Los Angeles County specific.
3. Update the batch modules associated to the batch jobs from recommendation 2.1.2.1 to only include Los Angeles County data.
4. Submit a Batch Scheduling Change Request (BSCR) to update the batch job names from recommendation 2.1.2.1 in the batch scheduler.
5. Migrate the latest versions of the following modules and batch properties from the C-IV code base into CalSAWS as county 00 jobs:
 - a. org.civ.bsd.issuance.batch.NightlyFCEDBCSweepBatch (PB00F304)
 - b. org.civ.bsd.issuance.batch.FutureMonthSupplementalSweepBatch (PB00F326)
6. Migrate/Replicate the batch properties of the batch jobs from recommendation 2.1.2.5 for the 57 Migration Counties (exclude Los Angeles County).
7. Update the batch modules associated to the batch jobs from recommendation 2.1.2.5 to only include data from the 57 Migration Counties.

2.1.3 Execution Frequency

PB00F304 and PB19F304 – Daily

PB00F326 and PB19F326 – Monthly

2.1.4 Key Scheduling Dependencies

There are no changes to the scheduling dependencies. The “new” PB00F304 and PB00F326 jobs will follow the same scheduling dependencies as the “old” PB19F304 and PB19F308 jobs. However, the actual batch scheduling for PB00F304 and PB00F326 (the 57 Migration Counties) will be handled by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.1.5 Counties Impacted

All Counties

2.1.6 Data Volume/Performance

PB19F304 (Formerly PB00F304): 7,606 per day

PB19F326 (Formerly PB00F308): 38,980 per month

PB00F304 (Migrated from C-IV) for C-IV Counties Only: 875 records per day

PB00F326 (Migrated from C-IV) for C-IV Counties Only: 5,927 per month

Note: CalWIN County statistics are not available

2.1.7 Failure Procedure/Operational Instructions

For all issuance sweep batch jobs, the jobs can be resubmitted after deleting the batch restart data. This may produce duplicate entries into the ISSUANCE_TRANCT table, however there is a cleanup job that will delete duplicate entries before the actual issuance batch create job runs.

2.2 Monthly Issuance County Batch (PBXXF100, PBXXF124, PBXXF125, and PBXXF126)

2.2.1 Overview

The Monthly Issuance County Batch will be broken out into multiple batch jobs to insert separate main payroll indicators for FC, KG, AAP, and other cash programs.

2.2.2 Description of Change

1. Replicate the existing Monthly Issuance County Batch (PBXXF100) batch properties for the 57 Migration Counties. The batch job will now be known as the “All Other Monthly Issuance County Batch” job.

Note: The All Other Monthly Issuance County Batch job will continue to insert “MONTHLY” into the BATCH_COUNTY_TRANSACT table for all the Non-FC/KG/AAP main payroll authorization records.

2. Replicate the existing Daily Issuance County Batch (PBXXF101) batch properties for the 57 Migration Counties. The batch job will now be known as the “All Other Daily Issuance County Batch” job.

Note: The All Other Daily Issuance County Batch job will continue to insert “NIGHTLY” into the BATCH_COUNTY_TRANSACT table for all the Non-FC/KG/AAP authorization records.

3. Create a new Foster Care Monthly Issuance County Batch (PBXXF124) job for all 58 Counties. The batch job will insert “MONTHLY_FC” into the BATCH_COUNTY_TRANSACT table for all FC main payroll authorization records.
 - a. Create the batch properties for all 58 counties.

Technical Note: Most of the batch properties can be copied from the All Other Monthly Issuance County Batch job (PBXXF100).

- b. Modify the Foster Care Main Payroll Sweep job (PB00F314) to look for “MONTHLY_FC” in the BATCH_COUNTY_TRANSACT table.
4. Create a new Kin-GAP Monthly Issuance County Batch (PBXXF125) job for all 58 Counties. The batch job will insert “MONTHLY_KG” into the BATCH_COUNTY_TRANSACT table for all KG main payroll authorization records.
 - a. Create the batch properties for all 58 counties.

Technical Note: Most of the batch properties can be copied from the All Other Monthly Issuance County Batch job (PBXXF100).

- b. Modify the Kin-GAP Main Payroll Sweep job (PB00F315) to look for “MONTHLY_KG” in the BATCH_COUNTY_TRANSACT table.
5. Create a new Adoption Assistant Program Monthly Issuance County Batch (PBXXF126) job for all 58 Counties. The batch job will insert “MONTHLY_AAP” into the BATCH_COUNTY_TRANSACT table for all AAP main payroll authorization records.
 - a. Create the batch properties for all 58 counties.

Technical Note: Most of the batch properties can be copied from the All Other Monthly Issuance County Batch job (PBXXF100).

- b. Modify the Adoption Assistance Program Main Payroll Sweep job (PB00F316) to look for “MONTHLY_AAP” in the BATCH_COUNTY_TRANSACT table.

2.2.3 Execution Frequency

All batch jobs mentioned in this section will be executed on a monthly frequency based on each county’s main payroll date for the respective

programs. The county main payroll dates are determined annually for the upcoming calendar year with a separate System Change Request (SCR).

2.2.4 Key Scheduling Dependencies

All batch jobs for Los Angeles County (County 19) mentioned above will belong to the R2MLYMP job set. The following jobs will be predecessors to the R2MLYMP job set:

PB19F111

PI19F428

PI19F416

Note: The predecessor jobs will need to be revisited for the 57 Migration Counties with CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

Negligible. Each batch job will be inserting one record per county for a total of 58 records per batch job per month. The number of records inserted will depend on the County's main payroll calendar.

2.2.7 Failure Procedure/Operational Instructions

Delete restart data and resubmit the jobs.

2.3 Indian Commodities Reader (PI33A106 & PI33A100)

2.3.1 Overview

The purpose of this interface is to receive information from Southern California Tribal Chairmen's Association regarding individuals who have received commodities in a given month. This interface runs for Riverside County only.

2.3.2 Description of Change

Create a BSCR to turn on PI33A106 (FTP) & PI33A100 (Processing) in CalSAWS.

2.3.3 Execution Frequency

Daily

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

Riverside County

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

No Change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1787	The CONTRACTOR shall migrate the C-IV County Specific Batch Jobs across the impacted Batch modules into the CalSAWS Software as determined during the migration design phase.	<ul style="list-style-type: none"> - All 58 counties will be incorporated into the same batch schedule. - The jobs that are new since side by side will be migrated into the CalSAWS System. - C-IV County interfaces that were included in LRS baseline will not require functional updates. - The Batch properties and scheduling will have to be updated for each wave separately. 	<ol style="list-style-type: none"> 1. The current PB00F304 and PB00F308 jobs have been repurposed to run only for LA County. 2. The C-IV version of the PB00F304 and PB00F308 jobs have been migrated into CalSAWS and modified to only run for the 57 migration counties. 3. New Issuance County Batch jobs were created from regular Main Payroll, FC Main Payroll, KG Main Payroll, and AAP Main Payroll.
1789	The CONTRACTOR shall update the CalSAWS Batch Scheduler to account for all the new CalSAWS Batch Jobs that are applicable to all 58 Counties.	<ul style="list-style-type: none"> - There will be one combined Batch Scheduler for all 58 Counties. - All non-County-specific Batch jobs that exist in LRS will run for all 58 Counties, unless otherwise specified in other DDIDs to be County configurable. - The CalSAWS batch schedule will be run nightly, excluding holiday and system down days, unless otherwise agreed to by the Consortia. - The Batch properties and scheduling will have to be updated for each wave separately 	<ol style="list-style-type: none"> 1. The repurposed LA County specific jobs for PB19F304 and PB19F308 have been updated in the scheduler. 2. The new Issuance County Batch jobs for LA County have been scheduled. 3. All 57 Migration County batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605 during each county's go-live.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217839 | DDID 1991

Display CalSAWS name throughout the system

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/16/2020	1.0	Initial	Erika Kusnadi-Cerezo
09/4/2020	2.0	Update Page Mapping section for Finding's related pages, updated mockup for the timed out message on the EBT Account page and modify the description of changes and updated the description of changes and mockup for the CalFresh Payment Accuracy Review section.	Erika Kusnadi-Cerezo
9/15/2020	3.0	Update the Page Usage/Data Volume for section 2.73.7 and updated mockup for section 2.22.2 to use CalSAWS logo	Erika Kusnadi-Cerezo
9/25/2020	4.0	Updated Figure 2.3.1 and 2.19.1 to match description of changes. Updated #2 and #3 on the Assumption section from address to addressed, 'Time Limit Detail' to 'Time Limist Aid Detail' on section 2.14, Section 2.18.3 #1c from generate to generated to match mockup, and added 15 to Section 2.21.3 #1f to match mockup.	Erika Kusnadi-Cerezo
9/30/2020	5.0	Updated Mockup 2.8.2 and added section 2.8.3.2c to relabel the button Link to LRS case to Link to case. Added Figure 2.1.3 and 2.1.2b, rename Figure 2.1.2 to 2.1.2a. Added to Section 2.1.3 #3 and 4 and added to 2.1.6 page mapping to be updated. Updated figure	Erika Kusnadi-Cerezo.

		<p>2.15.1 as well since the option for 'All' in the Type field is not an option. For the attach Additional document: CODE_TABLE the updated the information for the column Updated: SHORT_DECODE_NAME & UPDATED: LONG_DECODE_NAME for the following CATGRY_ID: 10070, 10076, 10079, 10086, 10095</p>	
10/6/2020		<p>Updated mockup for figure 2.1.2b so the message at the bottom of the page matches with all the other mockups and the change. Updated 'generated' to 'generate' in 2.18.3c and updated Figure 2.18.1a to match this change as well.</p>	

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1 OVERVIEW

1.1 Current Design

Currently the LRS/CalSAWS system has multiple references to 'LRS' throughout the system.

1.2 Requests

Update any references to 'LRS' throughout the LRS/CalSAWS system with CalSAWS, System or remove the LRS reference if applicable.

1.3 Overview of Recommendations

1. Pages in the system that have 'LRS' references will be updated to CalSAWS, System or be removed if applicable.
2. Values on the Category_ID table that reference 'LRS' will be updated to CalSAWS, System or be removed if applicable.

1.4 Assumptions

1. Existing functionality will remain unchanged unless called out as part of the design document.
2. 'LRS' references for reports/analytics/dashboard will be addressed separately. There are multiple efforts to address this which can be tracked under DDID 1991 under the Analytics Track.
3. 'LRS' references for Tasks will be addressed separately. There are multiple efforts to address this which can be tracked under the following DDID's: DDID 1955, DDID 1628, DDID 162.
4. 'LRS' references for Online Help page will be addressed separately with DDID 1071.

2 RECOMMENDATIONS

Any reference to 'LRS' throughout the LRS/CalSAWS system will be renamed to CalSAWS, System or 'LRS' will be removed if applicable.

2.1 Cash Aid Time Limit pages

2.1.1 Overview

Update 'LRS' references on the Cash Aid Time Limit pages to CalSAWS, System or remove if applicable.

2.1.2 Cash Aid Time Limit page Mockups

Cash Aid Time Limit Month List

[Close](#)

Name:
DOE, JANE 34F

Welfare to Work

Plan Sign Date: 06/30/2014 **Time Clock Start Date:** 07/01/2014 **Time Clock Start Reason:** **County:** Los Angeles

Clocks	Months Used	Months Remaining
TANF	48	12
CalWORKs	19	29
WTW	8	16

Search Results Summary
Results 1 - 9 of 9

<input type="checkbox"/>	Month/Year	TANF	CalWORKs	WTW	County	Add Reason	
<input type="checkbox"/>	07/2020	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	06/2020	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	03/2020	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	02/2020	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	01/2020	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	06/2019	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	05/2019	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	04/2019	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/>	07/2018	Count	Exempt	Exempt	Los Angeles	CalSAWS Month	Edit View History

[Remove](#)
[Add](#)

! - Manually calculated clocks do not match system rules.

[Close](#)

This Type 1 page took 1.73 seconds to load.

Figure 2.1.1 – Cash Aid Time Limit Month List

Cash Aid Time Limit Month Detail

* - Indicates required fields

Edit Close

Name: * DOE, JANE 34F	Effective Month: * 07/2020	Add Reason: * CalSAWS Month
Aid Issued By: * Los Angeles	Send to WDTIP? * Yes	Case Number: * B0WCW20
Program: * CalWORKs	Aid Code: 30 - CW-All Other Families (Fed)	

Exceptions

Type	Reason	Clocks	Created By
Exempt	302 - WtW - Disabled (30+ days)	CalWORKS/WTW	Batch, PB19E301
Exempt	321 - Participating in Appraisal, Assessment, or Development of a WTW Plan	WTW	Batch, PB19E301

Clocks	Status
TANF	Count
CalWORKs	Exempt
WTW	Exempt

! - Manually calculated clocks do not match system rules.

Last Updated On 07/09/2020 9:59:09 PM By: [583100](#)

Edit Close

This Type 1 page took 6.38 seconds to load.

Figure 2.1.2a – Cash Aid Time Limit Month Detail (View Mode)

Cash Aid Time Limit Month Detail

*- Indicates required fields

Edit

Close

Name: * DOE, JANE 34F	Effective Month: * 09/2020	Add Reason: * Manual
Aid Issued By: * Los Angeles	Send to WDTIP? * Yes	Case Number: * Non LRS Case Number
Program: * CalWORKs	Aid Code: 30 - CW-All Other Families (Fed)	Non LRS Case Number: * test

Exceptions

Type	Reason	Clocks	Created By
Exempt	302 - WtW - Disabled (30+ days)	CalWORKS/WTW	Batch, PB19E305

Clocks	Status
TANF	Count
CalWORKs	Exempt
WTW	Exempt

! - Manually calculated clocks do not match systems rules.

Last Updated On 09/29/2020 9:55:29 PM By: [997372](#)

Edit

Close

This [Type 1](#) page took 0.58 seconds to load.

Figure 2.1.2b – Cash Aid Time Limit Month Detail (View Mode)

Cash Aid Time Limit Month Detail

*- Indicates required fields

Save

Cancel

Name: *	Effective Month: *	Add Reason: *
<input type="text"/>	09/2020	Manual <input type="text"/>
Aid Issued By: *	Send to WDTIP? *	Case Number: *
Los Angeles <input type="text"/>	Yes	Non CalSAWS Case Number <input type="text"/>
Program: *	Aid Code: *	Non CalSAWS Case Number: *
CalWORKs <input type="text"/>	30 - CW-All Other Families (Fed) <input type="text"/>	<input type="text"/>

Exceptions

Type	Reason	Clocks	Created By
<input type="checkbox"/> Exempt	302 - WtW - Disabled (30+ days)	CalWORKS/WTW	Batch, PB19E305
<input type="text"/>	<input type="text"/>		<input type="text"/>
<input type="text"/>			<input type="text"/>

Last Updated On 08/29/2020 12:29:17 AM By: [588576](#)

Save

Cancel

This Type_1 page took 1.16 seconds to load.

Figure 2.1.3 – Cash Aid Time Limit Month Detail (Edit Mode)

2.1.3 Description of Changes

1. Update the message that displays at the bottom of the Cash Aid Time Limit Month List page from 'Manually calculated clocks do not match LRS rules' to 'Manually calculated clocks do not match system rules.'
2. Update the message that displays at the bottom of the Cash Aid Time Limit Month Detail page from 'Manually calculated clocks do not match LRS rules' to 'Manually calculated clocks do not match system rules.'
3. On the Cash Aid Time Limit Month Detail page relabel 'Non LRS Case Number:' to 'Non CalSAWS Case Number:' as shown on Figure 2.1.2b and Figure 2.1.3
4. On the Cash Aid Time Limit Month Detail page, update the drop down value of 'Non LRS Case Number' on the Case Number field to 'Non CalSAWS Case Number'.

Note: Under the 'Add Reason' field, the value 'LRS Month' is updated to 'CalSAWS Month'. This is part of the update to the Code Table value. Please reference section 2.25 of the design document (Supporting Document: CODE_TABLE updates.xlsx)

2.1.4 Page Location

- Global: Eligibility
- Local: Customer Information
- Task: Time Limits

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping to reflect the changes.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Duplicate CIN List

2.2.1 Overview

Update 'LRS' references on the Duplicate CIN List page to CalSAWS, System or remove if applicable.

2.2.2 Duplicate CIN List Mockup

Duplicate CIN List

The selected CIN: 986912059 has already been assigned to the following person(s) in CalSAWS:

Select Request New CIN Cancel

CIN Match Results					
Name	SSN	DOB	Gender	Address	Source
<input checked="" type="radio"/> Jcsajxxzq, Jane	123-45-6789		Female	888 N SAN VICENTE BLVD WEST HOLLYWOOD, CA 90069	CalSAWS

Select Request New CIN Cancel

This Type 1 page took 1.08 seconds to load.

Figure 2.2.1 – Duplicate CIN List

2.2.3 Description of Changes

1. Update the message that displays at the top of the Duplicate CIN List page from 'The selected CIN: xxxx has already been assigned to the

following person(s) in LRS:' to 'The selected CIN: xxxx has already been assigned to the following person(s) in CalSAWS:'

- a. 'xxxx' refers to the CIN number that was selected.

2.2.4 Page Location

- **Global: Case Info**
- **Local: New Application**
- **Task: N/A**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 e-Application Summary

2.3.1 Overview

Update 'LRS' references on the e-Application Summary page to CalSAWS, System or remove if applicable.

2.3.2 E-Application Mockup

The screenshot shows a web interface titled "e-Application Summary". At the top right, there are four buttons: "View Images", "Link e-App to Case", "Edit", and "Close". The main content area is a table with three columns and several rows of data:

e-App Number: LRS3836699	e-App Status: Transferred to System	Case Number: L0822E1
Application Date: 07/16/2020	Signed Date:	Transferred Date: 07/16/2020
Expedited Services/Immediate Need/Immediate MediCal: No	Authorized Representative:	Programs: CF, CW
Office: 015 Metro East 19 DRAPER DRIVE LOS ANGELES, CA 90023-3411	Signed SAWS2A:	
Child Abuse: No	Domestic Abuse: No	Elder Abuse: No
Other Emergency: No	Indian Reservation: No	Consent for Verifications: Yes
Origin: YBN USER	User Agency:	Years Verification Maintained:

Figure 2.3.1 – e-Application Summary

2.3.3 Description of Changes

1. On the e-Application Summary page, relabel the button titled 'Link e-App to LRS Case' to 'Link e-App to Case'.
 - a. Buttons are located on both the top and bottom of the e-Application Summary page.

2.3.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 EBT Card Detail

2.4.1 Overview

Update 'LRS' references on the EBT Card Detail page to CalSAWS, System or remove if applicable.

2.4.2 EBT Card Detail Mockup

EBT Card Detail

*- Indicates required fields

Reissue
Edit
Close

Card Number: 0766202862117080	Account Number: 1901B0WCW20
---	---

Card Information

Name: * AUDLEY, JOSEPHINA 34F	Recipient Type: * Primary	Access Type: * Cash & CalFresh	Status Date: 09/04/2007
Delivery Method: * Pickup	Status: * Card Printed	Status Reason:	PIN Locked: Yes Unlock PIN
			Restaurant Meals: No

Demographic Information

CalSAWS Address: Josephina Audley 105 BRAYTON RD PALMDALE CA 93550	EBT Address: Josephina Audley 105 BRAYTON RD PALMDALE CA 93550
Date of Birth: 10/28/1985	SSN: 705-77-1870
Date of Birth: 10/28/1985	SSN: 705-77-1870

Status History

Status	Status Reason	Access Type	Worker ID	Status Date
Card Printed		Cash & CalFresh	19	09/04/2007

Figure 2.4.1 – EBT Card Detail

2.4.3 Description of Changes

1. Update the Demographic Information section on the EBT Card Detail page to relabel 'LRS Address:' to 'CalSAWS Address:'.

2.4.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: EBT Account List**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update Page Mapping to reflect the change.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 CalFresh Payment Accuracy Review

2.5.1 Overview

Update 'LRS' references on the CalFresh Payment Accuracy Review page to CalSAWS, System or remove if applicable.


2.5.2 CalFresh Payment Accuracy Review Mockup

CalFresh Payment Accuracy Review

* - Indicates required fields

Review Number: 40078880 **Program:** CalFresh

Case Number: [REDACTED] **Case Name:** Case Name **Sample Month:** 05/2020

Review Date: * 

Disposition:


Type of Action:

File Type:

Program Type:

Allotment:

Finding:

Review Date: 

Error Amount:

Class Code:

Cause Code:

Nature Code:

CalSAWS Related Errors:

User Error:

User Error Amount:

Change Center Monitoring:

Error Causer By:

No Income Reptd/Still Deducted:

ABAWD Cases:

ABAWD Error Amount:

Comments:

Save Cancel

Figure 2.5.1 – CalFresh Payment Accuracy Review

2.5.3 Description of Changes

1. Relabel the following fields on the CalFresh Payment Accuracy Review page:
 - a. 'LRS Related Errors:' to 'CalSAWS Related Errors:'
 - b. 'LRS User Error:' to 'User Error:'
 - c. 'LRS User Error Amount:' to 'User Error Amount:'
 - d. 'MIE Comments:' to 'Comments:'

2.5.4 Page Location

- **Global: Special Units**
- **Local: Quality Review**
- **Task: Quality Review Detail**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Resources

2.6.1 Overview

Update 'LRS' references on the Los Angeles County Resources page to CalSAWS, System or remove if applicable.

2.6.2 Resources Mockup

Resources

[ATS - ASH](#)
[DPSS ePolicy](#)
[DPSS GAIN Policy](#)
[DPSS Office Locator](#)
[CalSAWS Simulation](#)
[CalSAWS User Calendar](#)

- www.dcfsc.co.la.ca.us
- www.probation.lacounty.gov
- www.mcscareergroup.com
- www.lacoe.edu
- www.jvsla.org
- www.weingart.org
- www.dmv.ca.gov
- www.edd.ca.gov
- www.css.lacounty.gov
- www.sbwib.org

GROW: CalWorks:

- [Kelly Blue Book](#)
- [The work number](#)
- [USCIS](#)
- [CA Immunization Registry](#)
- [CA POP Database](#)
- [DPSS Portal](#)

Figure 2.6.1 – Resource

2.6.3 Description of Changes

1. Update the titles on the following links on the Resources page to the following:
 - a. 'LRS Simulation' to 'CalSAWS Simulation'
 - b. 'LRS User Calendar' to 'CalSAWS User Calendar'
- Note: This is specific to Los Angeles County Resources links.

2.6.4 Page Location

- **Resources link on the Utilities navigation bar.**
Note: County must be Los Angeles.

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Homepage

2.7.1 Overview

Update 'LRS' references on the Homepage page to CalSAWS, System or remove if applicable.

2.7.2 Homepage Mockup

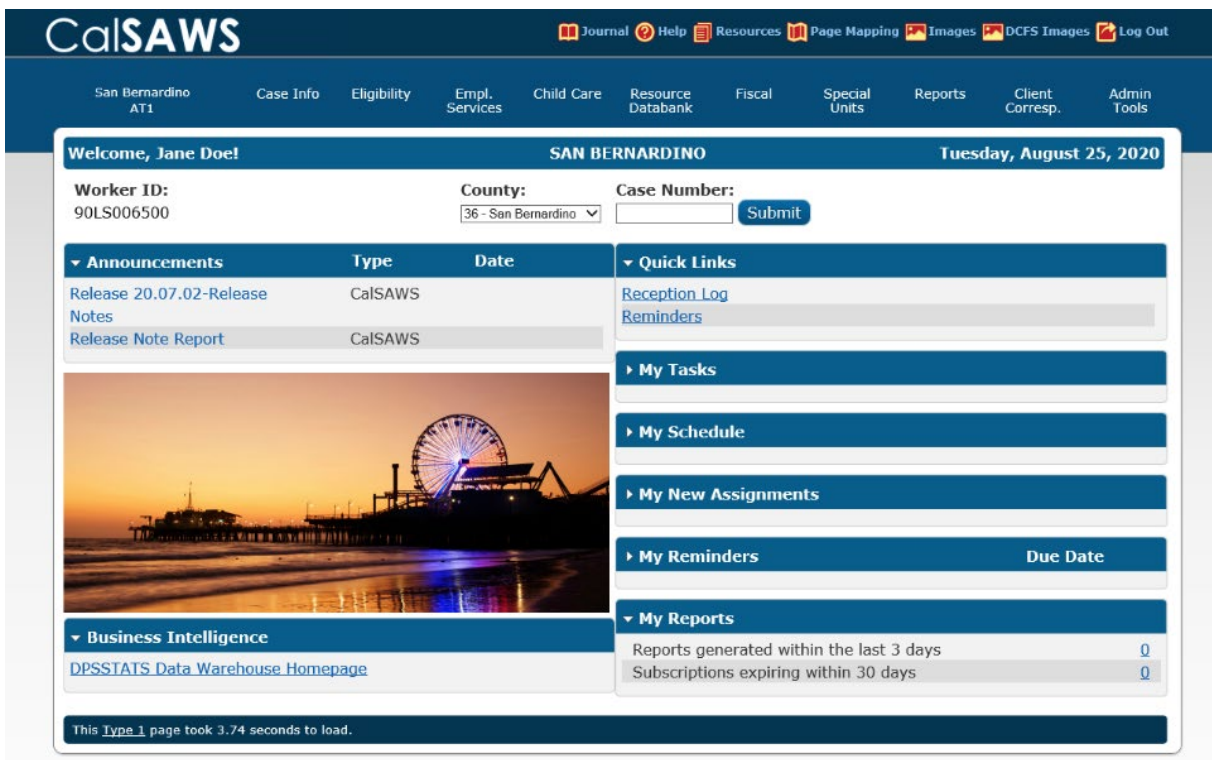


Figure 2.7.1 – Homepage

2.7.3 Description of Changes

1. Remove the 'LRS' logo located on the top left hand side of the homepage to 'CalSAWS'.
 - a. This change will apply to all pages in the CalSAWS system.
2. Create a new 'CalSAWS' logo as shown on Figure 2.7.1.
 - a. 'CalSAWS' logo will be in white Century Gothic font and will be located on the left hand side on the Utilities navigation bar row.
 - b. This change will apply to pages throughout the CalSAWS system.

3. Relabel 'LRS Quick Links' to 'Quick Links'
4. Relabel 'LRS Business Intelligence' to 'Business Intelligence'
5. Under the Announcements section, the value on the 'Type' column will be updated from 'LRS' to 'CalSAWS' for 'Release Note Report' and 'Release xx.xx.xx – Release Notes'
 - a. For 'Release xx.xx.xx – Release Notes' announcement the xx.xx.xx will refer to the release information.

2.7.4 Page Location

- **Homepage**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 IHSS Referral pages

2.8.1 Overview

Update 'LRS' references on the IHSS Referral pages to CalSAWS, System or remove if applicable.

2.8.2 IHSS Referral page Mockups

IHSS Referral Search

▼ Refine Your Search Search

Case Number: <input type="text"/>	IHSS Case Number: <input type="text"/>	Status: Pending ▼
<input type="checkbox"/> Show Unassigned Only	Referral Date Range:	
Assigned To: <input type="text"/> Select	From: <input type="text"/>	To: <input type="text"/>

Results per Page: 25 ▼ Search

IHSS Case	IHSS App Date	Case	Referral Date	Status	IHSS Office	Assigned To
No Data Found						

This Type_1 page took 7.77 seconds to load.

Figure 2.8.1 – IHSS Referral Search

IHSS Referral Detail

[Link to Case](#)[Edit](#)[Close](#)**IHSS Case Number:**

[REDACTED]

IHSS Application Date:

09/15/2020

Referral Date:

09/15/2020

Status:

Rejected

Assigned CalSAWS Worker:

Primary Applicant

Name:

[REDACTED]

Date of Birth:

[REDACTED]

Social Security Number:

[REDACTED]

Gender:

Male

CIN:**Spoken Language:**

Armenian

Phone Number:

[REDACTED]

Written Language:

English

Mailing Address:

[REDACTED]

Residence Address:

[REDACTED]

Authorized Representative

Name:**Phone Number:****Mailing Address:**

IHSS Worker

Name:

[REDACTED]

Worker Number:

[REDACTED]

E-mail:

[REDACTED]

Phone Number:

[REDACTED]

District Office:

19 Los Angeles

MEDS Information

County:**Case Number:****FBU:****Person Number:**

CalSAWS Case Information

Case Number:**Case Name:****Program Type:****Program Status:****Worker:**[Link to Case](#)[Close](#)[Edit](#)Last Updated On 09/16/2020 9:10:32 AM By: [583803](#)

This Type 1 page took 0.79 seconds to load.

Figure 2.8.2 – IHSS Referral Detail

2.8.3 Description of Changes

1. On the IHSS Referral Search page, relabel the following fields:
 - a. Relabel the editable field titled 'LRS Case Number:' to 'Case Number:'.
 - b. Relabel the column titled 'LRS Case' to 'Case'.
2. On the IHSS Referral Detail page, relabel the following fields:
 - a. Relabel the field titled 'Assigned LRS Worker:' to 'Assigned CalSAWS Worker:'.
 - b. Relabel the block titled 'LRS Case Information' to 'CalSAWS Case Information'.
 - c. Relabel the button titled 'Link to LRS Case' to 'Link to Case'.

2.8.4 Page Location

- **Global: Case Info**
- **Local: Referral**
- **Task: IHSS Referral Search**

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

Update Page Mapping to reflect the change.

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Information Update Detail

2.9.1 Overview

Update 'LRS' references on the Information Update Detail page to CalSAWS, System or remove if applicable.

2.9.2 Information Update Detail Mockup

Information Update Detail

Confirm
Close

MAGI Case Number: 5190380840	Case Number: L12C901	Case Name: Case Name
Referral Date: 07/16/2020	Type: Information Update	Status: In Process

Person Details

PN#	Name	Ethnic	Hispanic	Spoken Language	Written Language
01	SO CRAIG	Black or African American	No	English	English

Contact Details

PN#	Home	Work	Cell	E-Mail	Preferred Method of Communication
01			(310)555-2230	Dale.Borland@mailier.ie	Email

Mailing Address

PN#	Street	City	State	Zip
01				

Optional Gender Identity and Sexual Orientation Information

PN#	Gender Identity	Birth Certificate Gender	Sexual Orientation
01	Male	Male	Straight or Heterosexual

Authorized Representative

First Name:	Last Name:	Middle Name:
Maiden Name:	Suffix:	
Organization:	E-mail:	
Home:	Work:	Cell:

Requested Programs

CHDP	WIC	Family PACT
SHOP	EPSDT	PCSP
Voter Registration		

Confirm
Close

This Type_1 page took 2.56 seconds to load.

Figure 2.9.1 – Information Update Detail

2.9.3 Description of Changes

1. On the Information Update Detail page, relabel the following fields:
 - a. Relabel 'LRS Case Name' to 'Case Name'
 - b. Relabel 'LRS Case Number' to 'Case Number'

2.9.4 Page Location

- Global: Case Info
- Local: e-Tools
- Task: External Agencies → MAGI

2.9.5 Security Updates

N/A

2.9.6 Page Mapping

Update Page Mapping to reflect the change.

2.9.7 Page Usage/Data Volume Impacts

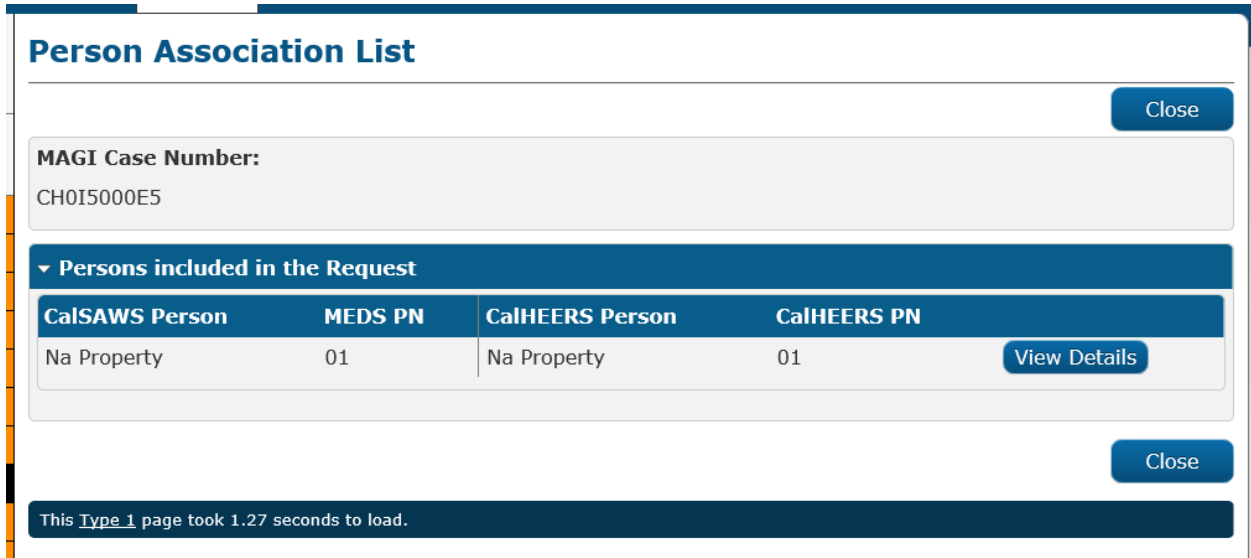
N/A

2.10 Person Association pages

2.10.1 Overview

Update 'LRS' references on the Person Association pages to CalSAWS, System or remove if applicable.

2.10.2 Person Association page Mockups



Person Association List Close

MAGI Case Number:
CH0I5000E5

▼ **Persons included in the Request**

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN
Na Property	01	Na Property	01

View Details Close

This Type 1 page took 1.27 seconds to load.

Figure 2.10.1 – Person Association List

Person Association Detail

Edit Close

MAGI Case Number:
CHOI5000E5

Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	Na Property	09/19/1954	890-80-9002	731962460
CalHEERS	01	Na Property	09/19/1954	890-80-9002	731962460

Edit Close

This [Type 1](#) page took 1.41 seconds to load.

Figure 2.10.2 – Person Association Detail

2.10.3 Description of Changes

1. On the Person Association List page, relabel the field titled 'LRS Person' to 'CalSAWS Person'.
2. On the Person Association Detail page, under the field titled 'Agency' renamed the column label 'LRS' to 'CalSAWS'.

2.10.4 Page Location

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

2.10.5 Security Updates

N/A

2.10.6 Page Mapping

Update Page Mapping to reflect the change.

2.10.7 Page Usage/Data Volume Impacts

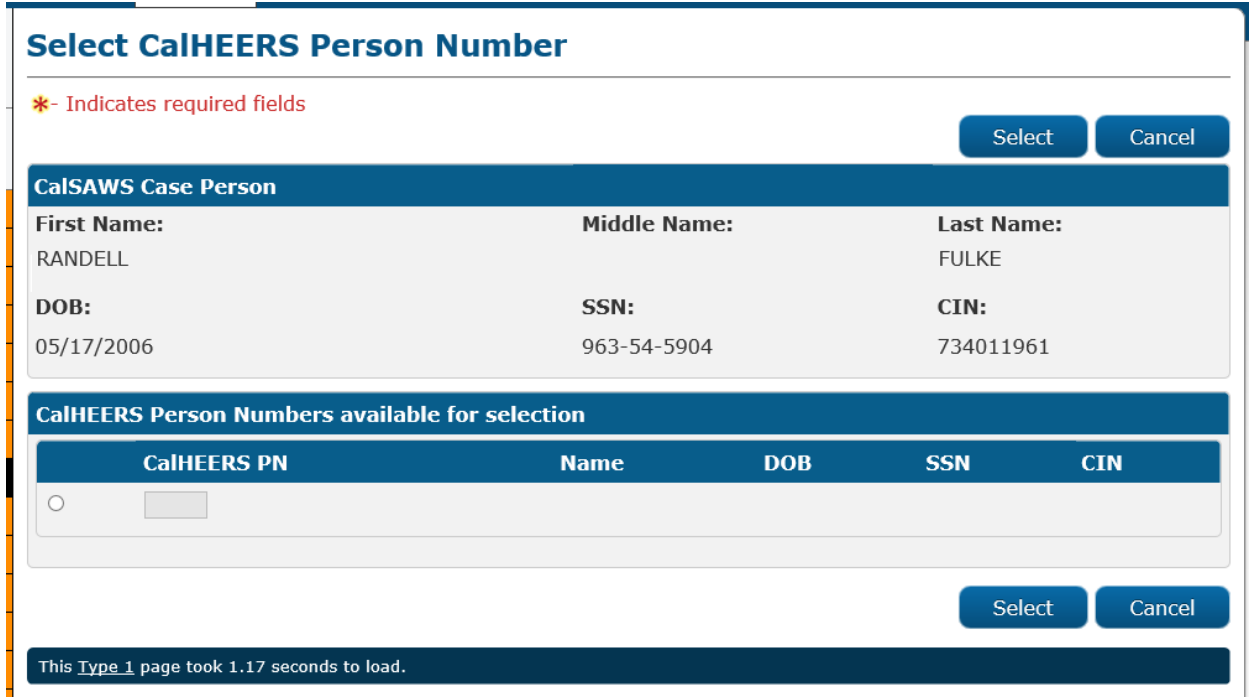
N/A

2.11 Select CalHEERS Person Number

2.11.1 Overview

Update 'LRS' references on the Select CalHEERS Person Number page to CalSAWS, System or remove if applicable.

2.11.2 Select CalHEERS Person Number Mockup



Select CalHEERS Person Number

*- Indicates required fields

Select Cancel

CalSAWS Case Person

First Name:	Middle Name:	Last Name:
RANDELL		FULKE
DOB:	SSN:	CIN:
05/17/2006	963-54-5904	734011961

CalHEERS Person Numbers available for selection

CalHEERS PN	Name	DOB	SSN	CIN
<input type="radio"/>				

Select Cancel

This Type_1 page took 1.17 seconds to load.

Figure 2.11.1 – Select CalHEERS Person Number

2.11.3 Description of Changes

1. On the Select CalHEERS Person Number page, relabel the block titled 'LRS Case Person' to 'CalSAWS Case Person'.

2.11.4 Page Location

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

2.11.5 Security Updates

N/A

2.11.6 Page Mapping

Update Page Mapping to reflect the change.

2.11.7 Page Usage/Data Volume Impacts

N/A

2.12 MAGI Request Detail

2.12.1 Overview

Update 'LRS' references on the MAGI Request Detail page CalSAWS, System or remove if applicable.

2.12.2 MAGI Request Detail page Mockup

MAGI Request Detail

Send All
Cancel

MAGI Case Number: CH0I5000E5	MAGI Case Name: CH - na property	Request ID: 10000000300
Case Number: 15000E5	Case Name: na property	
Type:	Status: Pending	
Run Reason: Continuing	Benefit Month: 09/01/2020	Program: * Medi-Cal

Application

Application Date: 08/06/2020	Primary Applicant/Recipient: Na Property	Application Source: SAWS
Life Change Event:	Life Change Event Date:	Requested Retro: No
Maintain Verifications: 5	Consent for Verifications: Yes	R&R Agreed: Yes
Signed Status/Date: Signed on 08/06/2020		

Case Members

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
Na Property	01	09/19/1954	890-80-9002	731962460	

View Associations

Requested Options

APTC/CSR

Begin Month: 09/01/2020	CSR: No
-----------------------------------	-------------------

Name	Status
No Data Found	

Requested Programs

CalWORKs	CalFresh	CHDP
WIC	Family PACT	SHOP
EPSDT	PCSP	

Authorized Representative

Comments

Worker Information

Worker ID:
19AS00006A

Status History

Status	Status Date	Initiated By
Pending	08/07/2020 3:24 PM	996640

Send All
Cancel

This [Type 1](#) page took 0.74 seconds to load.

Figure 2.12.1 – MAGI Request Detail

34

2.12.3 Description of Changes

1. On the MAGI Request Detail page, relabel the following fields:
 - a. Relabel 'LRS Case Name' to 'Case Name'
 - b. Relabel 'LRS Case Number' to 'Case Number'

2.12.4 Page Location

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

2.12.5 Security Updates

N/A

2.12.6 Page Mapping

Update Page Mapping to reflect the change.

2.12.7 Page Usage/Data Volume Impacts

N/A

2.13 MAGI Referral Detail

2.13.1 Overview

Update 'LRS' references on the MAGI Referral Detail page to CalSAWS, System or remove if applicable.

2.13.2 MAGI Referral Detail Mockup

MAGI Referral Detail

[Link to Case](#)
[Edit](#)
[Close](#)

MAGI Case Number: CH0I5000E5	MAGI Case Name: CH - na property	Initiated Date: 08/06/2020 11:05 AM
Origination:		
Case Number: I5000E5	Case Name: na property	Request ID: 10000000211
Type: Determination Response	Status: *	Covered CA Change:
Run Reason: Negative Action	Benefit Month: 09/01/2020	Program: * Medi-Cal

Application

Application Date: 08/06/2020	Primary Applicant/Recipient: Property, Na 65F	Application Source: SAWS
Life Change Event:	Life Change Event Date:	Requested Retro: No
Maintain Verifications: 5	Consent for Verifications: Yes	R&R Agreed: Yes
Signed Status/Date: Signed on 08/06/2020		

Case Members

Name	DOB	SSN	CIN	Non-Compliance	CalSAWS Person
Property, Na 65F	09/19/1954	890-80-9002	731962460		Yes

Figure 2.13.1 – MAGI Referral Detail

2.13.3 Description of Changes

1. On the MAGI Referral Detail page, relabel the following fields:
 - a. 'LRS Case Number:' to 'Case Number:'
 - b. 'LRS Case Name:' to 'Case Name:'
2. On the Case Members block of the MAGI Referral Detail page, relabel the field titled 'LRS Person' to 'CalSAWS Person'.
3. On the MAGI Referral Detail page, relabel both buttons titled 'Link to LRS Case' to 'Link to Case'.

2.13.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: External Agencies → MAGI**

2.13.5 Security Updates

N/A

2.13.6 Page Mapping

Update Page Mapping to reflect the change.

2.13.7 Page Usage/Data Volume Impacts

N/A

2.14 Time Limit Aid Detail

2.14.1 Overview

Update 'LRS' references on the Time Limit Aid Detail page to CalSAWS, System or remove if applicable.

2.14.2 Time Limit Aid Detail Mockup

Time Limit Aid Detail

*- Indicates required fields
Close

Benefit Month: * 10/2017	Ineligible Month: No	Overpayment Balance: \$0.00
------------------------------------	--------------------------------	---------------------------------------

Recoupable Aid

Manual Amount: *	\$	0.00
Amount:	\$	392.00
Total:	\$	392.00

▼ Recoupable Aid Amount History

Control Number	Program	Type	Status	Status Date	Amount
1916264959	CalWORKs	Issuance	Issued	09/23/2017	\$392.00

Overpayment Collections

Manual Amount:	\$	0.00
Amount:	\$	0.00
Total:	\$	0.00

▶ Overpayment Collection Amount History

Child Support Collections

Child Support Collection Amount:	\$	74.31
---	-----------	--------------

▼ Child Support Collection Amount History

Collection Number	Type	Posted Date	Amount
826145177	Assigned Arrears	07/02/2020	\$34.32
826145178	Assigned Arrears	07/02/2020	\$6.86
826124837	Assigned Arrears	06/26/2020	\$26.27
826124838	Assigned Arrears	06/26/2020	\$6.86

Time Limit Aid Balance:	=	317.69
--------------------------------	----------	---------------

Comments:

Close

Last Updated On 07/03/2020 2:25:51 AM By: [595441](#)

This Type 1 page took 1.27 seconds to load.

Figure 2.14.1 – Time Limit Aid Detail

2.14.3 Description of Changes

1. On the Time Limit Aid Detail page, relabel the following fields:
 - a. On the Recoupable Aid block, relabel 'LRS Amount' to 'Amount'.
 - b. Relabel the block titled 'LRS Recoupable Aid Amount History' to 'Recoupable Aid Amount History'.
 - c. On the Overpayment Collections block, relabel 'LRS Amount' to 'Amount'.
 - d. Relabel the block titled 'LRS Overpayment Collection Amount History' to 'Overpayment Collection Amount History'.

2.14.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Time Limit Aid Summary**

2.14.5 Security Updates

N/A

2.14.6 Page Mapping

Update Page Mapping to reflect the change.

2.14.7 Page Usage/Data Volume Impacts

N/A

2.15 Targeted Low-Income pages

2.15.1 Overview

Update 'LRS' references on the Targeted Low-Income pages to CalSAWS, System or remove if applicable.

2.15.2 Targeted Low-Income Mockups

Targeted Low-Income Search

<p>Case Number: <input type="text"/> <input type="button" value="Select"/></p>	<p>Sending Case Number: <input type="text"/></p>	<p>Type: <input type="text" value=""/></p>
<p>Initiated Date</p>	<p>To:</p>	<p>Status:</p>
<p>From: <input type="text"/> <input type="button" value=""/></p>	<p><input type="text"/> <input type="button" value=""/></p>	<p><input type="text" value=""/></p>
<p>ZIP: <input type="text"/></p>		

Results per Page:

This [Type_1](#) page took 1.03 seconds to load.

Figure 2.15.1 – Targeted Low-Income Search

Targeted Low-Income Detail

[Link to Case](#)
[Cancel](#)

Sending Case Number: 00009728252
Initiated Date: 03/22/2018
Case Number:

Type: Regular Application
Current Status: Received
Case Name:

▼ All People Associated with the Referral

	Name	DOB	SSN	CIN
<input checked="" type="checkbox"/>	JOHN DOE	05/25/1997	603985504	91192522D
<input type="checkbox"/>	JANE DOE	05/01/1967		

▼ Healthy Families

Application Date: 02/20/2018
Retro MC: No
RE Month:

Primary Applicant/Recipient: JOHN DOE
Disabled Members: No

Program Status: Active
Unlisted Member Requesting MC: Yes

Name	Role	Status
JOHN DOE	MEM	Active
JANE DOE	FSO	Denied

Status History

Status	Status Date	Initiated By
Received	03/22/2018	244506

Sending County Comments

33332574598

Assignment

Worker:
[Select](#)

[Link to Case](#)
[Cancel](#)

This Type_1 page took 1.73 seconds to load.

Figure 2.15.2 – Targeted Low-Income Detail

2.15.3 Description of Changes

1. On the Targeted Low-Income Search page, relabel the field titled 'LRS Case Number' to 'Case Number'.
2. On the Search Results Summary section on the Targeted Low-Income Search page, relabel the column titled 'LRS Case Number' to 'Case Number'.

3. On the Targeted Low-Income Detail page, relabel the field titled 'LRS Case Number' to 'Case Number'.
4. On the Targeted Low-Income Detail page, relabel the buttons titled 'Link to LRS Case' to 'Link to Case'.

2.15.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: External Agencies → Targeted Low-Income**

2.15.5 Security Updates

N/A

2.15.6 Page Mapping

Update Page Mapping to reflect the change.

2.15.7 Page Usage/Data Volume Impacts

N/A

2.16 Threshold Language Monitoring

2.16.1 Overview

Update 'LRS' references on the Threshold Language Monitoring page to CalSAWS, System or remove if applicable.

2.16.2 Threshold Language Monitoring Mockup

Threshold Language Monitoring

*- Indicates required fields Save Cancel

Review Number: 40078880	Program: CalFresh	
Case Number: B006D48	Case Name: Case Name	Sample Month: 05/2020
Review Date: * <input type="text"/>	Reviewer Worker ID:	Reviewer Name:
App Date: <input type="text"/>	District Number: <input type="text"/>	Worker ID: <input type="text"/>

Language Designation Form

PA 481 on file?

Language Designation

Is Section A completed?

Spoken Language Designated?

Other language (specify):

Is Section B completed?

Written language designated?

Other language (specify):

Findings II

Is PA 481 signed by participant?

Is PA 481 signed by CCW?

Is PA 481 signed by ES?

Is Designated Language NOA on file?

Case comments:

Was "Disclosure" box checked?

Are there any errors on the case?

Comments

Save Cancel

Figure 2.16.1 – Threshold Language Monitoring

2.16.3 Description of Changes

1. On the Threshold Language Monitoring page, relabel the field titled 'LRS Case Comments:' to 'Case Comments:'

2.16.4 Page Location

- **Global: Special Units**
- **Local: Quality Review**
- **Task: Finding**

2.16.5 Security Updates

N/A

2.16.6 Page Mapping

N/A

2.16.7 Page Usage/Data Volume Impacts

N/A

2.17 Case and Procedural Error Rate (CAPER)

2.17.1 Overview

Update 'LRS' references on the Case and Procedural Error Rate (CAPER) page to CalSAWS, System or remove if applicable.

2.17.2 Case and Procedural Error Rate (CAPER) Mockup

Case and Procedural Error Rate (CAPER)

* - Indicates required fields

Save

Cancel

Review Number: 40078880	Program: CalFresh	
Case Number: B006D48	Case Name: Case Name	Sample Month: 05/2020
Application Number: <input type="text"/>		Finding Program: <input type="text"/>
Review Date: * <input type="text"/>	Reviewer Worker ID: <input type="text"/>	Reviewer Name: <input type="text"/>
District Number: <input type="text"/>	Case Review: <input type="text"/>	Worker ID: <input type="text"/>

2 Negative Case Action:

Did applicant request Expedited Services?

Where Q's 14 thru 18 answered by pt. on SAWS1?

Did EW evaluate household for ES?

Was additional info requested? (postponed verification)

Was ID provided by applicant?

Was the ES determination explained in C/C?

Was County Column completed by CWD?

Was VCL generated?

Was ES dispositioned timely in the system? (within 3 days of application)

3 Withdrawal:

Client's request?

Application Date:

Denial/Withdrawal Date:

Notice Date:

Was the CW89 signed by PT?

Was CW 10 sent?

4 Denial:

Correct NOA sent?

Correct regulations on NOA?

Was NOA/NOMI issued timely?

Info Correctly updated in the system?

NOA held until the 30th day?

Documents to support denial?

NOMI Issued?

5. Analysis of Review Negative Case Action:

Valid?

Was Error initiated by Customer Service Center?

Was Tracking Ticket generated?

6. Termination/Discontinuance:

Correct NOA sent?

Termination Date:

Notice Date:

Correct regulations on NOA?

Was NOA issued timely?

Info Correctly updated in the system?

NOMI issued?

Documents to support termination?

Rescind required?

TCF generated correctly?

TCF Start Date:

TCF End Date:

7. Results of Disagreement:

Verification provided after review date?

Reviewer misapplied policy?

Reviewer in advertance?

Other?

8. System Errors:

9. Review comments:

Save

Cancel

Figure 2.17.1 – Case and Procedural Error Rate (CAPER)

2.17.3 Description of Changes

1. On the Case and Procedural Error Rate (CAPER) page, relabel the following fields:
 - a. Update the field titled 'Was ES dispositioned timely on LRS? (within 3 days of application)' to 'Was ES dispositioned timely in the system? (within 3 days of application)'.
 - b. Update the fields titled 'Info Correctly updated on LRS?' to 'Info Correctly updated in the system?'.
 - c. Update the field titled 'LRS Errors:' to 'System Errors'.

2.17.4 Page Location

- **Global: Special Units**
- **Local: Quality Review**
- **Task: Finding**

2.17.5 Security Updates

N/A

2.17.6 Page Mapping

N/A

2.17.7 Page Usage/Data Volume Impacts

N/A

2.18 General Assistance/General Relief Case Review

2.18.1 Overview

Update 'LRS' references on the General Assistance/General Relief Case Review page to CalSAWS, System or remove if applicable.

2.18.2 General Assistance/General Relief Case Review Mockups

General Assistance/General Relief Case Review

*- Indicates required fields Save Cancel

1. Case Information:

Review Number: 40078880	Program: CalFresh	
Case Number: B006D48	Case Name: Case Name	Sample Month: 05/2020
Review Date: * <input type="text"/>	Reviewer Worker ID:	Reviewer Name:
District Number: <input type="text"/>	Unit Number: <input type="text"/>	Worker ID: <input type="text"/>
GR App Date: <input type="text"/>	Case status: <input type="text"/>	Disposition: <input type="text"/>

2. Unemployable (U)(GR 41-100, 41-200, 41-300)*?

Needs Special Assistance(NSA)

Was NSA policy applied correctly?

If No, the reason is: (chaeck all that apply)

- PA 2012 not completed and/or not on file
- System beginning and end dates do not match PA 2012
- System Data Collection/Disability DAPD screen not completed
- Pt failed both SSI Advocacy appointment but system did not generate an appointment to see EW
- Pt did not attend appt with EW but aid was not denied/terminated for whereabouts unknown
- Administrative Decision: ABP 597 not completed not/or not on file
- Other

Administratively Unemployable (Admin U)

Category:

Figure 2.18.1a – General Assistance/General Relief Case Review

Category:

Was Admin U policy applied correctly?

If No, the reason is: (check all that apply)

- System not updated to reflect appropriate Admin U reason
- Case comments or verification (if applicable) not on file to substantiate the Admin U determination?
- If Admin Decision, Data Collection/Disability DAPD screen not completed to reflect the appropriate reason
- System not updated to match the duration stated on verification provided (if any)

Unemployability

Was Temp U/Perm U Policy applied correctly?

If No, the reason is: (check all that apply)

- Pt did not attend Medical Disability Assessment appt
- ABP 1676P/Disability Statement completed by County/VA/Private insured physician not on file
- No other Temp U reason due to unavailable next appt documented on Case Comments
- Medical Disability Assessment not schedule
- Perm U status assigned incorrectly by the system
- Perm U not given to GR Pt. who has an approved Medi-Cal case
- Other

Disability /???Valid From/??? Date

Disability /???Expiration/??? Date

ABP 23A, Notice About Change to Employable Status was generated 10 days prior to expiration date?

If Good Cause determined, completed ABP 592 on file

Figure 2.18.1b – General Assistance/General Relief Case Review

SSI Advocacy

Was SSI Advocacy applied correctly

If No, the reason is (check all that apply)

- If determined unemployable (Temp U, NSA, Perms are automatically deferred to SSP MAP) for 12 out of 18 months, the system did not generated an ABP SSI 3
- 2nd notice was not generated
- Pt. did not attend 2nd SSI apt but aid not terminated
- 65-year-old Pt. did not apply SSI-but aid was not terminated
- Refusal to apply for SSI documented in Case Comments but aid was not terminated
- Other

If Good Cause determined, completed ABP 592 on file

3. Employable (GR 41-400)*

Employable

Were Employable Requirements applied Correctly

If No, the reason is (check all that apply)

- ABP 589 not completed and/or not on file but aid was not denied/terminated (if not registered within 12 months)
- ABP 85 not completed and/or not on file but aid was not denied/terminated
- Appropriate screen(s) were not completed

Figure 2.18.1c – General Assistance/General Relief Case Review

Employable Status is

4. General Policies & Requirements (40-100)/MSARP (40-120)

Were General Policies & Requirements applied correctly?

If No, the reason is (check all that apply)

Pt. was fired from or quit a job within 60 days but application date without Good Cause but aid was not denied

Pt. eligible for other benefits and/or resources but did not apply for them and aid was not terminated/denied

ABP 898-16 was not completed and/or not on file, but aid was not terminated

Initial Statement of Facts was not signed and dated but aid not denied

Note: The deficiency reasons listed above do not apply to NSA participants

SSP 14 (09/10) not signed and dated, but did aid not denied

Completed PA 481 was not on file

Completed TEMP2215 was not on file

Completed SAWS 1 was not on file

Completed Form 5076 was not on file

Other

If Good Cause determined, completed ABP 1170 on file

Was MSARP policy applied correctly

If No, the reason is (check all that apply)

Pt. failed to attend Assessment apt, but aid was not terminated/denied

Substance Abuse Pre-screening screen is not completed

Positive Pre-screening result, but system did not generate Assessment apt

Figure 2.18.1d – General Assistance/General Relief Case Review

15. NOA & Hearings (44-400)*

Was NOA & Hearings policies applied as a result of a negative action during the sample month

If No, the reason is (check all that apply)

CalSAWS/Manual NOA not generated

NOA not sent at least nine calendar days prior to the hearing date

Hearing date and time not on NOA

GR Regulations Section not correctly cited on NOA

Legal Aid Information not on NOA

Other

Figure 2.18.1e – General Assistance/General Relief Case Review

2.18.3 Description of Changes

1. On the General Assistance/General Relief Case Review page, relabel the following fields:
 - a. 'LRS beginning and end dates do not match PA 2012' will be updated to 'System beginning and end dates do not match PA 2012'. (Figure 2.18.1a)

- b. 'LRS Data Collection/Disability DAPD screen not completed' to 'System Data Collection/Disability DAPD screen not completed'. (Figure 2.18.1a)
- c. 'Pt failed both SSI Advocacy appointment but LRS did not generated an appointment to see EW' to 'Pt failed both SSI Advocacy appointment but system did not generate an appointment to see EW'. (Figure 2.18.1a)
- d. 'LRS not updated to reflect appropriate Admin U reason' to 'System not updated to reflect appropriate Admin U reason'. (Figure 2.18.1b)
- e. 'LRS case comments or verification (if applicable) not on file to substantiate the Admin U determination?' to 'Case comments or verification (if applicable) not on file to substantiate the Admin U determination?' (Figure 2.18.1b)
- f. 'If Admin Decision, LRS Data Collection/Disability DAPD screen not completed to reflect the appropriate reason' to 'If Admin Decision, Data Collection/Disability DAPD screen not completed to reflect the appropriate reason'. (Figure 2.18.1b)
- g. 'LRS not updated to match the duration stated on verification provided (if any)' to 'System not updated to match the duration stated on verification provided (if any)' (Figure 2.18.1b)
- h. 'Perm U status assigned incorrectly by LRS' to 'Perm U status assigned incorrectly by the system'. (Figure 2.18.1b)
- i. 'If determined unemployable (Temp U, NSA, Perms are automatically deferred to SSP MAP) for 12 out of 18 months, LRS did not generated an ABP SSI 3' to 'If determined unemployable (Temp U, NSA, Perms are automatically deferred to SSP MAP) for 12 out of 18 months, the system did not generate an ABP SSI 3'. (Figure 2.18.1c)
- j. 'Appropriate LRS screen(s) not completed' to 'Appropriate screen(s) were not completed'. (Figure 2.18.1c)
- k. 'Initial LRS Statement of Facts was not signed and dated but aid not denied' to 'Initial Statement of Facts was not signed and dated but aid not denied'. (Figure 2.18.1d)
- l. 'Substance Abuse Pre-screening screen on LRS is not completed' to 'Substance Abuse Pre-screening screen is not completed'. (Figure 2.18.1d)
- m. 'Positive Pre-screening result, but LRS did not generate Assessment apt' to 'Positive Pre-screening result, but system did not generate Assessment apt'. (Figure 2.18.1d)
- n. 'LRS/Manual NOA not generated' to 'CalSAWS/Manual NOA not generated'. (Figure 2.18.1e)

2.18.4 Page Location

- **Global: Special Units**
- **Local: Quality Review**
- **Task: Finding**

2.18.5 Security Updates

N/A

2.18.6 Page Mapping

N/A

2.18.7 Page Usage/Data Volume Impacts

N/A

2.19 Medi-Cal Application Processing

2.19.1 Overview

Update 'LRS' references on the Medi-Cal Application Processing page to CalSAWS, System or remove if applicable.

2.19.2 Medi-Cal Application Processing Mockup

Medi-Cal Application Processing

*- Indicates required fields

Save

Cancel

1. Case Information:

Review Number: 40078880	Program: CalFresh	
Case Number: BOKIN20	Case Name: Case Name	Sample Month: 05/2020
Review Date: * <input type="text"/>	Reviewer Worker ID: <input type="text"/>	Reviewer Name: <input type="text"/>
District Number: <input type="text"/>	Unit Number: <input type="text"/>	Worker ID: <input type="text"/>
Application Number: <input type="text"/>	Aid Code: <input type="text"/>	
Application disposition: <input type="text"/>	Review disposition: <input type="text"/>	

2. Processing Time:

Application processed within 45 days	<input type="text"/>
Application Date	<input type="text"/>
Authorization Date	<input type="text"/>
Number of Days	<input type="text"/>

3. Deficiencies

	<input type="text"/>
--	----------------------

4. Causes

Trouble ticket initiated (Explain in detail in Section XI, Include date of TT and resolution)	<input type="text"/>
---	----------------------

5. Are there any U.S. Citizen or U.S. Nationals in the household?

DRA Citizenship requirement met/exempt?	<input type="text"/>
If no, indicate ID #	<input type="text"/>
If citizenship requirement is not met, has birth match been requested?	<input type="text"/>
DRA Identity requirement met/exempt?	<input type="text"/>
If no, indicate ID #	<input type="text"/>
If DRA requirements are not met, is applicant receiving full scope benefits?	<input type="text"/>
Is SSN or proof of application for SSN provided?	<input type="text"/>
If it has been 60 days since date of application and proof of SSN is not provided, are the benefits terminated?	<input type="text"/>
Were DRA actions documented in Case Comments?	<input type="text"/>
If NO, indicate who missed documenting comments	<input type="text"/>
Any discrepancies between DRA Detail screen and MEDS?	<input type="text"/>

6. Are there any Legal Permanent Residents (LPR) in the household?

Is SAVE document in file for all household members with LPR status	<input type="text"/>
Is secondary or additional verification necessary per SAVE document?	<input type="text"/>
If secondary or additional verification is necessary, is there a copy of G-845 on file?	<input type="text"/>
Is IEVS abstract on file?	<input type="text"/>

7. Medical Support Enforcement Forms in file?

If no, select item:	<input type="text"/>
Are there any case comments pertaining to Medical Support Enforcement forms?	<input type="text"/>
Is the Absent Parent Screen completed for each absent/unmarried parent?	<input type="text"/>

8. Was CHDP referral requested on the application

Was CHDP referral completed in the system?	<input type="text"/>
--	----------------------

9. Any discrepancies between MEDS and CalSAWS?

If Yes, select item:	<input type="text"/>
CalSAWS Aid Code(s):	<input type="text"/>
MEDS Aid Code(s):	<input type="text"/>

10. Unresolved MEDS alerts:

If Yes, list alert#:	<input type="text"/>
MEDS critical alerts:	<input type="text"/>
MEDS Recon alerts:	<input type="text"/>

11. Reviewer Comments: (Detail comments required for all deficiencies)

<input type="text"/>

12. Are there ANY errors in this case:

Date NOA Issued:	<input type="text"/>
NOA Issued For:	<input type="text"/>
Correct Reason Should Be:	<input type="text"/>
System or User Error:	<input type="text"/>

Save

Cancel

Figure 2.19.1 – Medi-Cal Application Processing

2.19.3 Description of Changes

1. On the Medi-Cal Application Processing page, relabel the following fields:
 - a. 'Is LRS Absent Parent Screen completed for each absent/unmarried parent?' to 'Is the Absent Parent Screen completed for each absent/unmarried parent?'
 - b. 'Was CHDP referral on LRS completed?' to 'Was CHDP referral completed in the system?'
 - c. '9. Any discrepancies between MEDS and LRS' to '9. Any discrepancies between MEDS and CalSAWS'.
 - d. 'LRS Aid Code(s):' to 'CalSAWS Aid Code(s):'
 - e. 'LRS or User Error:' to 'System or User Error:'

2.19.4 Page Location

- **Global: Special Units**
- **Local: Quality Review**
- **Task: Finding**

2.19.5 Security Updates

N/A

2.19.6 Page Mapping

N/A

2.19.7 Page Usage/Data Volume Impacts

N/A

2.20 Medi-Cal Negative Case Action

2.20.1 Overview

Update 'LRS' references on the Medi-Cal Negative Case Action page to CalSAWS, System or remove if applicable.

2.20.2 Medi-Cal Negative Case Action Mockup

Medi-Cal Negative Case Action

*- Indicates required fields

Save

Cancel

1. Case Information:

Review Number:
40078880

Program:
CalFresh

Case Number:
B006D48

Case Name:
Case Name

Sample Month:
05/2020

Review Date: *

Reviewer Worker ID:

Reviewer Name:

District Number:

Unit Number:

Worker ID:

Disposition:

2. Reason For Termination (reason agency is terminating the case)

CalSAWS term reason:

MEDS term reasons:

3. Termination Action Correct?

If No, select item:

If SB87 requirement not applied, indicate missing step:

CalSAWS Error?

4. Was this case rescinded within the cure month?

5. Was this case re-established (instead of being rescinded)?

Within cure month?

At the same district?

6. Benefits active on MEDS?

7. Any discrepancies between MEDS and CalSAWS?

If Yes, select item:

CalSAWS aid codes discrepancies:

MEDS aide codes discrepancies:

8. Unresolved MEDS alerts?

If Yes, select alert #:

MEDS critical alerts:

MEDS Recon alerts:

9. Medical Support Enforcement Forms in file?

If No, select item:

Are there any case comments pertaining to Medical Support Enforcement forms?

Is the Absent Parent Screen completed for each absent/unmarried parent?

10. Are there any Legal Permanent Residents (LPR) in the household?

Is SAVE document on file for all household members with LPR status?

Is secondary or additional verification necessary per SAVE document? (Answer "No" only if SAVE docs are in file)

If secondary or additional verification is necessary, is there a copy of the G-845 on file? (Answer "No" only if additional verification necessary)

11. Review Comments:

12. Are there ANY errors in this case?

Save

Cancel

Figure 2.20.1 – Medi-Cal Negative Case Action

2.20.3 Description of Changes

1. On the Medi-Cal Negative Case Action page, relabel the following fields:
 - a. 'LRS term reason:' to 'CalSAWS term reason'
 - b. 'LRS Error?' to 'CalSAWS Error?'
 - c. '7. Any discrepancies between MEDS and LRS?' to '7. Any discrepancies between MEDS and CalSAWS?'
 - d. 'LRS aid codes discrepancies:' to 'CalSAWS aid codes discrepancies:'
 - e. 'Is LRS Absent Parent Screen completed for each absent/unmarried parent?' to 'Is the Absent Parent Screen completed for each absent/unmarried parent?'

2.20.4 Page Location

- **Global: Special Units**
- **Local: Quality Review**
- **Task: Finding**

2.20.5 Security Updates

N/A

2.20.6 Page Mapping

N/A

2.20.7 Page Usage/Data Volume Impacts

N/A

2.21 Medi-Cal Redetermination Review

2.21.1 Overview

Update 'LRS' references on the Medi-Cal Redetermination Review page to CalSAWS, System or remove if applicable.

2.21.2 Medi-Cal Redetermination Review Mockup

Medi-Cal Redetermination Review

* - Indicates required fields

Save Cancel

1. Case Information:

Review Number: 40078880 Program: CalFresh
Case Number: B006D48 Case Name: Case Name Sample Month: 05/2020
Review Date: * Reviewer Worker ID: Reviewer Name:
District Number: Unit Number: Worker ID:
Disposition:

2. Was Redetermination process completed timely (in due or cure month)? (If Yes, go to section IV)

3. Reasons for Redetermination not completed timely: (Complete ONLY if answer to section II is NO)

4. Redetermination disposition:

5. Was the case terminated?

Terminated for ???No/??? RD (Redetermination not received)?

If Yes, was reminder phone call made (FML 369)?

Terminated for Failure to Provide?

If Yes, was SBB7 followed?

If No, indicate missing step:

6. Required verification/ documentation on file?

If No, select items:

6) Change in Immigration/ Citizenship Status
7) Address/ Disability Verif.
8) MC 210 RV
9) IEVS

7. Are changes reported on MC210 RV updated in the system?

If No, select items:

1) Income
2) Expenses/ Deductions
3) Other Health Insurance

8. Was CHDP referral requested?

If Yes, was CHDP referral completed in the system?

9. Are there any Legal Permanent Residents (LPR) in the household? (if No, go to section X)

Is SAVE document on file for all household members with LPR?

Is secondary or additional verification necessary per SAVE document? (Answer No only if SAVE docs are in file)

If secondary or additional verification is necessary, is there a copy of G-845 on file? (Answer "No" only if additional verification necessary)

10. Medical Support Enforcement Forms in file?

If No, select item:

Are there any case comments pertaining to Medical Support Enforcement forms?

Is the Absent Parent Screen completed for each absent/unmarried parent?

11. Was there a change from zero SOC to SOC? (if section 8(a) on MC210 RV is check)

Any eligible child for Medi-Cal/ Healthy Families bridging program?

All steps followed in the referral of eligible children to Medi-Cal/HF Bridging Program?

If No, check steps not followed:

1) Children not placed on MEDS with 7X (PA-5308)
2) Consent not on file (per CHDP on CalSAWS)
3) Pt. not contacted for verbal consent

12. Are there any U.S. Citizens or U.S. Nationals in the household?

If Yes, enter ID#:

DRA citizenship requirement met/ exempt?

ID#:

DRA identity requirement met/ exempt?

ID#:

If not met, are copies of citizenship/ identity document marked ???original seen??? on file?

If No, check MEDS INQE screen. Is citizenship/ identity verified by SSN data match?

If No, check MEDS INWA screen. Is there MEDS alerts?

Which alerts?

Any discrepancies between DRA Detail screen and MEDS?

13. Any discrepancies between MEDS and CalSAWS?

If Yes, select item:

CalSAWS Aid Code(s):

MEDS Aid Code(s):

14. Unresolved MEDS alerts:

If Yes, list alert#:

MEDS critical alerts:

MEDS Recon alerts:

15. Was RD result documented in CalSAWS case comments?

16. Was the case imaged on EDMS?

17. Review Comments:

18. Are there ANY errors in this case?

19. Error caused by?

Save Cancel

Figure 2.21.1 – Medi-Cal Redetermination Review

2.21.3 Description of Changes

1. On the Medi-Cal Redetermination Review page, relabel the following fields:
 - a. '7. Are changes reported on MC210 RV updated on LRS?' to '7. Are changes reported on MC210 RV updated in the system?'
 - b. 'If yes, was CHDP referral on LRS completed?' to 'If yes, was CHDP referral completed in the system?'
 - c. 'Is LRS Absent Parent Screen completed for each absent/unmarried parent?' to 'Is the Absent Parent Screen completed for each absent/unmarried parent?'
 - d. '13. Any discrepancies between MEDS and LRS?' to '13. Any discrepancies between MEDS and CalSAWS?'
 - e. 'LRS Aid Code(s):' to 'CalSAWS Aid Code(s):'
 - f. '15. Was RD result documented in LRS case comments?' to '15. Was RD result documented in CalSAWS case comments?'

2.21.4 Page Location

- **Global: Special Units**
- **Local: Quality Review**
- **Task: Finding**

2.21.5 Security Updates

N/A

2.21.6 Page Mapping

N/A

2.21.7 Page Usage/Data Volume Impacts

N/A

2.22 System Error Message

2.22.1 Overview

Update the message that is being displayed on the System Error Message page to remove the 'LRS' reference.

2.22.2 System Error Message Mockup

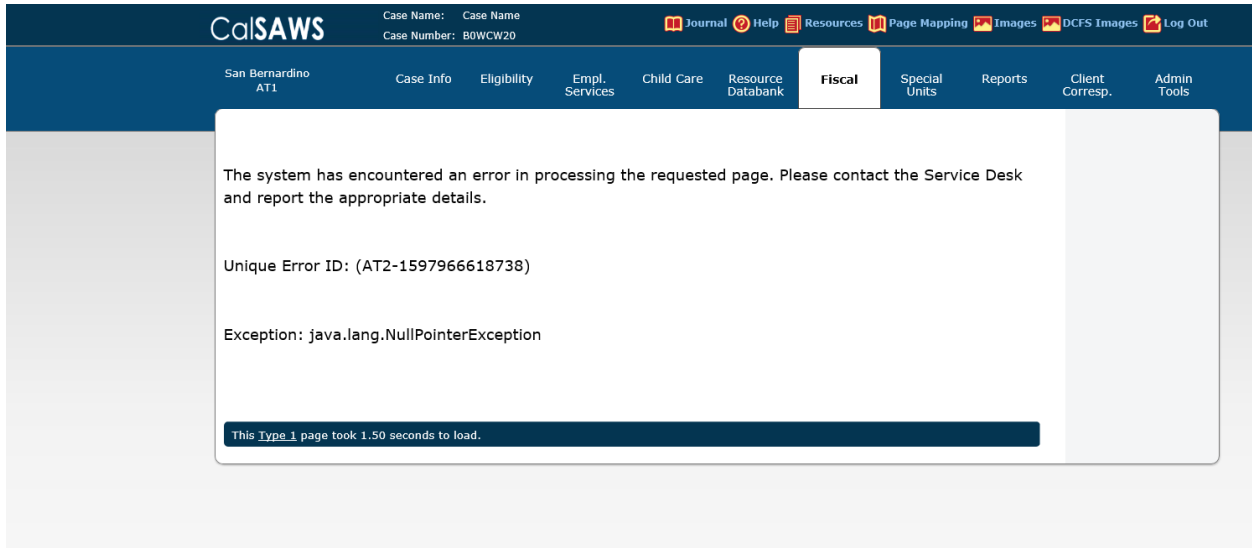


Figure 2.22.1 – System Error Message

2.22.3 Description of Changes

1. Update the message that displays in the system when an error is encountered. Updated the message 'The system has encountered an error in processing the requested page. Please contact the LRS Service Desk and report the appropriate details.' to 'The system has encountered an error in processing the requested page. Please contact the Service Desk and report the appropriate details.'

2.22.4 Page Location

- N/A

2.22.5 Security Updates

N/A

2.22.6 Page Mapping

N/A

2.22.7 Page Usage/Data Volume Impacts

N/A

2.23 EBT Account pages

2.23.1 Overview

Update the message that is displayed on the EBT Account pages when it is not able to connect to the EBT system.

2.23.2 EBT Account Timed Out Message Mockup

The screenshot shows a web interface for 'EBT Account Detail'. At the top right, there are two buttons: 'Add Card' and 'Close'. Below these buttons, a red error message reads: 'No response has been received from the EBT System. System has timed out the connection. Please try again later.' Below the message is a table with account details:

Account Number: 1901B0WCW20	Begin Date: 07/14/2015	End Date:
Card Holder: * Josephina Audley	Card Access Type: * Cash & CalFresh	Card Status: Issued

Below the table is a section titled 'Cash' with a blue header. It contains a table with the following information:

Status: Active	Balance: \$64,051.85
--------------------------	--------------------------------

Figure 2.23.1 – EBT Account Timed Out Message

2.23.3 Description of Changes

1. Update the messages that displays on the EBT Account pages when the system did not receive a response from the EBT System.
 - a. Update the Timed Out message to 'No response has been received from the EBT System. System has timed out the connection. Please try again later.'

2.23.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: EBT Account List**

2.23.5 Security Updates

N/A

2.23.6 Page Mapping

N/A

2.23.7 Page Usage/Data Volume Impacts

N/A

2.24 Run EDBC pages

2.24.1 Overview

Update 'LRS' references on the Run EDBC pages to CalSAWS, System or remove if applicable.

2.24.2 Run EDBC page Mockups

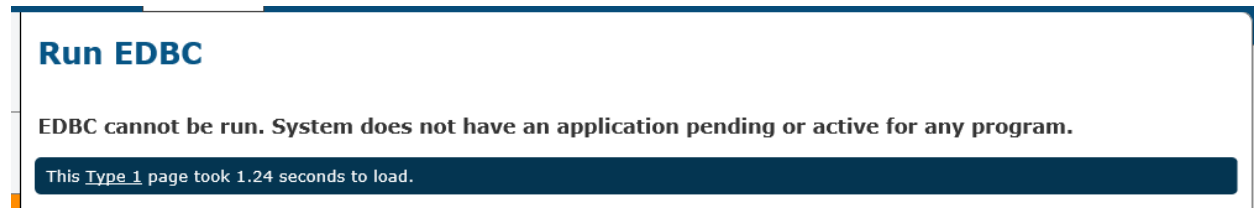


Figure 2.24.1 – Run EDBC and Manual EDBC – EDBC cannot be run message

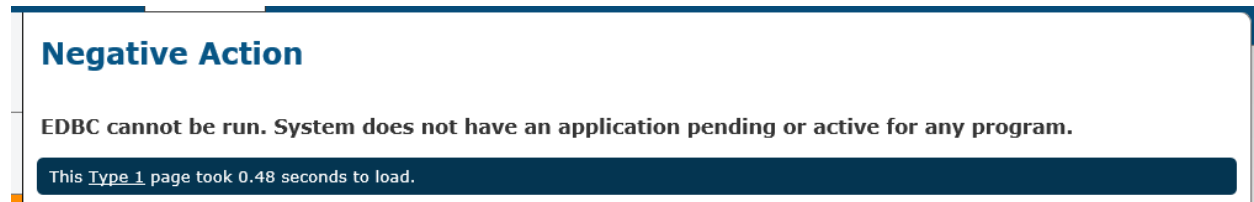


Figure 2.24.2 – Negative Action - EDBC cannot be run message.

2.24.3 Description of Changes

1. Update the EDBC cannot be run message for the following pages: Run EDBC, Create Manual EDBC, Negative Action Detail pages.
 - a. Message will be updated from 'EDBC cannot be run. LRS does not have an application pending or active for any program.' to 'EDBC cannot be run. System does not have an application pending or active for any program.'

2.24.4 Page Location

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

- **Task: Run EDBC (For Run EDBC page) or Manual EDBC (for Create Manual EDBC page)**

Page Location for Negative Action Detail page:

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Negative Action**

2.24.5 Security Updates

N/A

2.24.6 Page Mapping

N/A

2.24.7 Page Usage/Data Volume Impacts

N/A

2.25 Code Detail table

2.25.1 Overview

Update 'LRS' values on the CODE_DETL table to 'CalSAWS', 'System' or remove if applicable.

2.25.2 Mockup

N/A – No page change

2.25.3 Description of Changes

1. Update the CODE_DETL table as specified in the 'CODE_TABLE updates' Supporting Document.

2.25.4 Page Location

- **N/A**

2.25.5 Security Updates

N/A

2.25.6 Page Mapping

N/A

2.25.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Code Detail Table	List of changes to the values on the CODE_DETL table	CODE_TABLE updates.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1991	<p>The CONTRACTOR shall display the CalSAWS name throughout the system including but not limited to page name, badges, logos, headers on forms and NOAs, to the 58 County users.</p>	<p>LRS State Forms and NOAs do not include a System or County logo as of July 2018. It is assumed the non-display of a System or County logo on State Forms and NOA's will continue with CalSAWS. Therefore, there is no associated estimate with updating a logo on LRS State Forms or NOAs.</p> <ul style="list-style-type: none"> - There are 398 LRS BI Reports and 53 C-IV BI Reports that have been identified to be ported into the new system, for a total of 451 BI reports that will require updates as of July 2018. - The effort to create a new system logo is accounted for as part of Migration DDID #106. The dashboards will be updated to reflect the new CalSAWS system logo. There will be no County specific logos. - The image will be a static CalSAWS system logo in the OBIEE pages and will not dynamically change by county to county specific logos. 	<p>References to 'LRS' throughout the systems were updated 'CalSAWS', 'System' or removed.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217984 | DDID 1967

Add L9 Aid Code for Converted EDBC records

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Renee Gustafson
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/04/2020	0.1	Original Draft	Renee Gustafson
09/09/2020	0.2	Added Begin Date column to section 2.1.2	Renee Gustafson

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1 OVERVIEW

The 'L9' aid code does not exist in LRS/CalSAWS but is available in C-IV.

In CalHEERS 16.7 release with Change Request 3124, the CalHEERS project implemented a new Affordability Benefit Program for New Qualified Immigrants (NQIs). As part of this new functionality, CalHEERS project updated the Business Rules Engine (BRE) to determine 'L9' aid code and three new Eligibility Evaluation Reason Codes (EERC). C-IV added the 'L9' aid code and the three new EERCs to the C-IV system to display the new values. This NQI program, although deployed to CalHEERS production, is currently in an "off" state and was never turned "on." The 'L9' aid code is available for override in C-IV and as of today, there exists two erroneous overridden EDBC with the 'L9' aid code. For both of the cases with overridden EDBC with 'L9' aid code, the user corrected the benefits in a subsequent EDBC, so there are no active Medi-Cal beneficiaries with the 'L9' aid code.

LRS/CalSAWS did not add the 'L9' aid code nor the three new NQI-related EERCs. To keep the C-IV EDBC history intact upon migration, 'L9' aid code will be added to LRS/CalSAWS, but it will be end-dated and will not be available for override or manual EDBC. The three new NQI-related EERCs will not be added to LRS/CalSAWS as CalHEERS has no plan to turn on the NQI functionality. LRS/CalSAWS will add the NQI-related EERCs in a future effort in coordination with CalHEERS if CalHEERS turns on the NQI functionality.

1.1 Current Design

LRS/CalSAWS does not have 'L9' aid code.

1.2 Requests

1. Add the 'L9' aid code to LRS/CalSAWS for historical converted EDBC records "L9 - 21-65 Year Old 138% Full 5 Year Bar"
2. The L9 aid code is not a current, valid aid code so it should be end-dated so that it cannot be selected on the Override or Manual EDBC pages.

1.3 Overview of Recommendations

1. Add 'L9' aid code to LRS/CalSAWS for the Medi-Cal program. The aid code will be end-dated so that it cannot be selected on the Override or Manual EDBC pages.

1.4 Assumptions

1. There will be no updates to Medi-Cal EDBC rules to grant 'L9' aid code as this is a MAGI Medi-Cal aid code and it is currently not in use by CalHEERS.
2. No impacts to MEDS.
3. No impacts to reports, noticing or forms.

2 RECOMMENDATIONS

2.1 L9 Aid Code

2.1.1 Overview

1. Add 'L9' aid code to LRS/CalSAWS for the Medi-Cal program. The aid code will be end-dated so that it cannot be selected on the Override or Manual EDBC pages.

2.1.2 Description of Changes

1. Add a new aid code to the Aid Code table (CT_184).

Column Name	Value
Code Num Identif	L9
Short Decode Name	L9 - 21-64 Year Old 138% Full 5 Year Bar
Long Decode Name	21-64 Year Old at or below 138% Full Scope 5 Year Bar
Code Descr	Provides full-scope coverage for qualified non-citizens 19-64 year olds at or below 138% FPL who have not met the 5 Year Bar.
Begin Date	01/01/1000
End Date	06/30/2020
SOC	N
Eligibility Medi-Cal Benefit Categorization	Full
Fed/Non-Fed	FE
C-IV Program	MC
TANF Indicator	N
TANF Priority	-1
MEDS Aid Code Segment	PR
Valid for Override	Y
MAGI Aid Code	Y
MSP Aid Code	N
LTC Aid Code	N
Non-MAGI Aid Code	N

For all columns not mentioned in the above table, the value will be blank (null).

2.1.3 Programs Impacted

Medi-Cal

2.1.4 Performance Impacts

No impacts to performance

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</p>	<p>C-IV EDBC history with 'L9' aid code will be preserved when migrated into LRS/CalSAWS.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218535 | DDID 1967

Add CalSAWS Text Terms & Conditions to
CalSAWS.org

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tiffany Cheung
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/25/2020	1.0	Initial Draft	Tiffany Cheung
8/28/2020	1.1	Update Section 1	Avi Bandaranayake
10/6/2020	1.2	Updates from QA Comments	Tiffany Cheung

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1 OVERVIEW

This DDID covers the addition of an informational page about texting to the public CalSAWS.org website.

1.1 Current Design

Both C-IV and Los Angeles County DPSS have public facing websites that provide information on text messaging.

1.2 Requests

Add a webpage to the CalSAWS.org website with the CalSAWS Text Terms & Conditions, to link to from CalSAWS text messages sent to customers who have opted-in to text messaging.

1.3 Overview of Recommendations

1. Add a new webpage to CalSAWS.org with text messaging Terms and Condition information.

1.4 Assumptions

1. A new short code number will be used for all messages sent from CalSAWS as of the 21.01 release.
2. The CalSAWS Text Terms & Conditions Page will only display in English.

2 RECOMMENDATIONS

2.1 CalSAWS Text Terms & Conditions Page

2.1.1 Overview

A new page will be added to the external CalSAWS Website (CalSAWS.org) for the CalSAWS Text Terms & Conditions. CalSAWS text messages sent to customers who have opted-in to text messaging will have a link to this page on the initial Opt-in text message.

2.1.2 CalSAWS Text Terms & Conditions Page Mockup

CalSAWS News Meetings System Updates Procurement Resources Careers About Us [Ask CalSAWS](#)

CalSAWS Text Terms & Conditions

What is CalSAWS Text?

CalSAWS Text is a text messaging service from your county to your phone that may alert you of the following:

- ✓ When you have an appointment
- ✓ When you are missing necessary documents for your case
- ✓ When you have Verification Due
- ✓ Status of your Customer Reports (Semi-Annual Report, Recertification)
- ✓ CalWORKS and CalFresh Benefit Amount (if applicable)

You may sign up by texting **CalSAWS** to **62315** or contact your worker to enroll you in the CalSAWS Text service and you will have an opportunity to confirm the service via a reply to an initial text message you receive from your worker. By replying "Y" to this message, you are confirming a subscription to CalSAWS Text service.

How do I sign up for CalSAWS Text?

After signing up, you will receive a text message. It may take some time to reach your phone. By replying "Y" to this message, you are confirming a subscription to CalSAWS Text Service. You will not be enrolled in a "mailing list" when you subscribe to this service.

You may also contact your worker to help you enroll in the CalSAWS Text service.

Will I be charged for the text alerts I receive from CalSAWS Text?

You will not be charged by CalSAWS Text service. However, check your mobile plan since standard text message and data rates may apply.

What are CalSAWS Text mobile terms?

When you provide your mobile phone number to CalSAWS Text service, you agree that CalSAWS Text may send you text messages to that phone number. You may receive **up to 10 messages per month, standard text message and data rates may apply.**

For help, send a text message with the word **HELP** to **62315**. You may stop receiving text messages at any time by texting the word **STOP, STOP ALL, END, QUIT, CANCEL or UNSUBSCRIBE** to **62315**. You agree to receive a final text message confirming your decision to be removed from the CalSAWS Text service. You may also be able to stop receiving text messages by contacting your county/worker. Texts will be sent through an automated system. You agree to notify your county/worker of any changes to your mobile number. Certain Mobile Features may be restricted or incompatible with your carrier or mobile device, please contact your carrier with questions regarding these issues.

Supported carriers include: AT&T, U.S. Cellular, Verizon Wireless, Boost, Virgin Mobile, Metro PCS and T-Mobile.

T-Mobile is not liable for delayed or undelivered messages.

If you have any additional questions or concerns, please call **(844) 859-2100** to find your county number and speak to a representative

Figure 2.1.1 – CalSAWS Text Terms & Conditions Page on CalSAWS.org

2.1.3 Description of Changes

1. Create a new page on the CalSAWS Website (www.calsaws.org/thlp) to add Terms & Conditions for CalSAWS Text.
 - a. Add "What is CalSAWS Text" section:

What is CalSAWS Text?

CalSAWS Text is a text messaging service from your county to your phone that may alert you of the following:

- i. When you have an appointment
- ii. When you are missing necessary documents for your case
- iii. When you have Verification Due
- iv. Status of your Customer Reports (Semi-Annual Report, Recertification)
- v. CalWORKs and CalFresh Benefit Amount (if applicable)

You may sign up by texting **CalSAWS** to **62315** or contact your worker to enroll you in the CalSAWS Text service and you will have an opportunity to confirm the service via a reply to an initial text message you receive from your worker. By replying "Y" to this message, you are confirming a subscription to CalSAWS Text service.

- b. Add "How do I sign up for CalSAWS Text" section:

How do I sign up for CalSAWS Text?

After signing up, you will receive a text message. It may take some time to reach your phone. By replying "Y" to this message, you are confirming a subscription to CalSAWS Text Service. You will not be enrolled in a "mailing list" when you subscribe to this service.

You may also contact your worker to help you enroll in the CalSAWS Text service.

In addition, you may also text **CalSAWS** to **62315** to enroll yourself in the CalSAWS Text service.

- c. Add "Will I be charged for the text alerts I receive from CalSAWS Text?" section:

Will I be charged for the text alerts I receive from CalSAWS Text?

You will not be charged by CalSAWS Text service. However, check your mobile plan since standard text message and data rates may apply.

- d. Add "What are CalSAWS Text mobile terms?" section:

What are CalSAWS Text mobile terms?

When you provide your mobile phone number to CalSAWS Text service, you agree that CalSAWS Text may send you text messages to that phone number. You may receive **up to 10 messages per month, standard text message and data rates may apply.**

For help, send a text message with the word **HELP** to **62315**. You may stop receiving text messages at any time by texting the word **STOP, STOP ALL, END, QUIT, CANCEL or UNSUBSCRIBE** to **62315**. You agree to receive a final text message confirming your decision to be removed from the CalSAWS Text service. You may also be able to stop receiving text messages by contacting your county/worker. Texts will be sent through an automated system. You agree to notify your county/worker of any changes to your mobile number. Certain Mobile Features may be restricted or incompatible with your carrier or mobile device, please contact your carrier with questions regarding these issues.

Supported carriers include: AT&T, U.S. Cellular, Verizon Wireless, Boost, Virgin Mobile, Metro PCS and T-Mobile.

T-Mobile is not liable for delayed or undelivered messages.

If you have any additional questions or concerns, please call **(844) 859-2100** to find your county number and speak to a representative.

2.1.4 Page Location

- CalSAWS Website
 - About Us
 - Public Information
 - CalSAWS Text

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<ul style="list-style-type: none"> - Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones. 	<p>Added new page with Terms and Conditions.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218540 | DDID 1967

Add WINS Hours Verification Type for Historical
C-IV Converted records

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/12/2020	1.0	Initial Document	Yale Yee
9/7/2020	1.1	Updated cosmetic changes based on QA comments	Yale Yee
9/28/2020	1.2	Added assumption and fixed typo based on Deliverable comments.	Amy Gill

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1 OVERVIEW

Verification records are used to track data based on customer information. If a verification record is not verified for required customer information, there may be a negative impact to benefits for the customer.

1.1 Current Design

The 'WINS Hours' verification type exists in C-IV and does not exist in LRS/CalSAWS.

1.2 Requests

1. Update the Verification Detail page to display the converted verification type of 'WINS Hours' which is not available in LRS/CalSAWS.

1.3 Overview of Recommendations

1. The 'WINS Hours' verification type will display on the Verification Detail page for converted verification records.

1.4 Assumptions

1. There are no changes to the existing LRS/CalSAWS WINS logic or verification logic. This change will only impact converted verification records for display purposes.

2 RECOMMENDATIONS

The 'WINS Hours' verification type will be converted from C-IV to LRS/CalSAWS and will be displayed on the Verification Detail page.

2.1 Verification Detail page

2.1.1 Overview

The Verification Detail page displays details based on the information of the verification record.

The Verification List page displays details from the Verification Detail page.

2.1.2 Verification Detail Mockup

N/A – No page change

2.1.3 Description of Changes

1. Add the 'WINS Hours' verification type with a begin date of 01/01/1000 and an end date of 12/31/9999. This verification type is not selectable for new verification records.

Note: The Verification Type will be assigned a new code number identifier in LRS/CalSAWS, as the existing code number identifier of '71' is already in use in LRS/CalSAWS.

2. Display the 'WINS Hours' verification type only for historical records on the Verification Detail page in View and Edit mode.

Note: The verification type will display on the Verification List page.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

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