CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208565 | DDID 1967

Migrate 'Failure to Provide Eligibility Forms' Non-Compliance

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

As the 57 Migration counties are migrating into CalSAWS, DDID 1054: Non-Compliance Research Analysis identified conversion impacts and differences between the systems to be addressed. This SCR CA-208565 will address 'FTP: Eligibility Forms' impacts.

1.1 Current Design

In C-IV, a Worker evaluates a customer's compliance for completing and returning their necessary eligibility forms. If required forms are not returned, the User can create a Non-Compliance record on the Eligibility Non-Compliance page for Type: Failure to Provide (FTP), Reason: Eligibility Forms. When EDBC is run, the rules set the appropriate status for the person or program and a corresponding Denial or Discontinuance Notice of Action (NOA) will generate. The User will append details of the customer's missing eligibility forms and regulations to the NOA.

In CalSAWS, the Non-Compliance reason, FTP: Eligibility Forms does not exist for the CalWORKs (CW) and CalFresh (CF) programs. It exists for the Medi-Cal (MC) program but no NOA is currently generated.

1.2 Requests

Migrate the C-IV FTP: Eligibility Forms Non-Compliance functionality and EDBC logic to CalSAWS and generate the corresponding Denial or Discontinuance NOA.

1.3 Overview of Recommendations

1. Migrate the C-IV Non-Compliance Type: Failure to Provide, Reason: Eligibility Forms to CalSAWS for the CalWORKs and CalFresh programs. Remove the FTP reason: Verifications for the Medi-Cal program.
2. Update EDBC rules to evaluate the Non-Compliance of FTP: Eligibility Forms and set the appropriate status for the person or program for CalWORKs and CalFresh.
3. Migrate the C-IV NOA reason fragment for failure reason, FTP Eligibility Forms to populate on Denial and Discontinuance NOAs for CalWORKs, CalFresh, and Medi-Cal programs. Also migrate the reason fragment in applicable threshold languages.

1.4 Assumptions

1. There are no changes to the CalSAWS eHIT interface. The new Non-Compliance Reason of FTP Eligibility Forms will not be sent to CalHEERS.
2. There are no changes to current Medi-Cal EDBC rules as the system already evaluates for the existing Medi-Cal Non-Compliance reason of FTP: Eligibility Forms.

3. There will be no MAGI Denial NOA generated for a MAGI Medi-Cal person with EDBC status reason FTP Eligibility Forms.
4. After EDBC generates a FTP Eligibility Forms Denial or Discontinuance NOA, the User is responsible for appending language to the NOA to inform the customer what specific eligibility form was not provided and the applicable regulations.
5. There are no functional impacts when end-dating Medi-Cal Non-Compliance FTP reason: Verifications. This FTP reason will continue to display for historical records.
6. CA-207384 migrated the CMSP NOA fragment associated to a customer not returning their eligibility paperwork.

2 RECOMMENDATIONS

2.1 Eligibility Non-Compliance Detail

2.1.1 Overview

For CalWORKs (also known as Cash) and CalFresh programs, migrate the Non-Compliance type: Failure to Provide, reason: Eligibility Forms to the Eligibility Non-Compliance Detail page.

For Medi-Cal programs, remove the Failure to Provide reason: Verifications from the page because there is already automated EDBC logic in CalSAWS to evaluate for past-due verifications.

2.1.2 Eligibility Non-Compliance Detail Mockup

N/A for dropdown value changes only

2.1.3 Description of Changes

1. For the Cash/CalWORKs program and after selecting Non-Compliance Type: Failure to Provide – alphabetically add 'Eligibility Forms' to the Reason dropdown list.
2. For the CalFresh program, add 'Failure to Provide' to the end of the Non-Compliance Type dropdown list. Also alphabetically add 'Eligibility Forms' to the Reason dropdown list.
3. For the Medi-Cal program and after selecting Non-Compliance Type: Failure to Provide – remove 'Verifications' from the Reason dropdown list.
   Note: Historical Non-Compliance records for FTP Verifications will continue to display on the page.

   Technical Note: Removing is equivalent to end-dating 'Verifications' code from code category id: 365.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Update EDBC Rules for CalWORKs and CalFresh programs

2.2.1 Overview

With the Non-Compliance reason, FTP: Eligibility Forms added for the CalWORKs and CalFresh programs, EDBC rules will be updated to evaluate this non-compliance to set the appropriate status for the person or program.

2.2.2 Description of Changes

1. Update CalWORKs and CalFresh EDBC rules to evaluate the Non-Compliance type: Failure to Provide, reason: Eligibility Forms and set the appropriate status, denied or discontinued, for the person or program.

2.2.3 Programs Impacted

CalWORKs, CalFresh

2.2.4 Performance Impacts

N/A

2.3 Correspondence: Add new Reason Fragment for CalWORKs

2.3.1 Overview

Migrate the C-IV NOA reason fragment and details to generate on the new CalWORKs NOAs for FTP Eligibility Forms.

2.3.2 Description of Change

1. Create the new reason fragment that will generate on a denial or discontinuance NOA when the CalWORKs program is denied or discontinued for failure status reason 'FTP Eligibility Forms'.

NOA Template: NOA 290

Program: CalWORKs

Action Type: Denial, Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes (NA_BACK9_FRAGMENT)

NOA Mockups/Examples: Refer to Section 3: Supporting Documents

Ordering on NOA: The new reason fragment will be after the 'Here's why:' of the action fragment.

Languages (13)**:** English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Hmong, Lao, Russian, Arabic, Farsi, Vietnamese

a. Create a new reason fragment to be applied for CalWORKs:

NOA	Description	Text	Formatting
CW Denial & Discontinuance	Static	We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10

b. Add generation logic for the new fragment. Generate the fragment on a CalWORKs denial or discontinuance NOA when the following is true:
    a. The CalWORKs program status is Denied or Discontinued
    b. The program failed for the EDBC status reason of 'FTP Eligibility Forms'

c. The following are the action and message details for the FTP Eligibility Forms NOA:

NOA	Action Fragment	Message Fragment
CW Denial	CW_DN_ACTION1 (ID: 4015)	CW_DN_MESSAGE4 (ID: 5017)
CW Discontinuance	CW_TN_ACTION4 (ID: 4026)	CW_TN_MESSAGE1 (ID: 5022)

d. Add the following regulations for the new fragment based on program:

Program	Regulation
CalWORKs	MPP 40-105.1, 40-115, 40-157.2, 40-157.3, 40-181(k), 40-181.2

e. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
CW Denial	FTP Eligibility Forms	NOA – CW – DE – FTP ELIG FORMS
CW Discontinuance	FTP Eligibility Forms	NOA – CW – DS – FTP ELIG FORMS

2.4 Correspondence: Add new Reason Fragment for CalFresh

2.4.1 Overview

Migrate the C-IV NOA reason fragment and details to generate on the new CalFresh NOAs for FTP Eligibility Forms.

2.4.2 Description of Change

1. Create the new reason fragment that will generate on a denial or discontinuance NOA when the CalFresh program is denied or discontinued for failure status reason 'FTP Eligibility Forms'.

   Program: CalFresh

   Action Type: Denial, Discontinuance

   Fragment Level: Program

   Repeatable: No

   Include NA Back 9: Yes (NA_BACK9_FRAGMENT)

   NOA Mockups/Examples: Refer to Section 3: Supporting Documents

   Ordering on NOA: The new reason fragment will be after the 'Here's why:' of the action fragment.

   Languages (13)**:** English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Hmong, Lao, Russian, Arabic, Farsi, Vietnamese

   a. Create a new reason fragment to be applied for CalFresh:

NOA	Description	Text	Formatting
CF Denial & Discontinuance	Static	We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10

   b. Add generation logic for the new fragment. Generate the fragment on a CalFresh denial or discontinuance NOA when the following is true:
      a. The CalFresh program status is Denied or Discontinued
      b. The program failed for the EDBC status reason of 'FTP Eligibility Forms'

   c. The following are the template, action, and message details for the FTP Eligibility Forms NOA:

NOA	NOA Template	Action Fragment	Message Fragment
CF Denial	DFA 377.1A (3/02)	CF_DN_ACTION1 (ID: 4008)	CF_DN_MESSAGE1 (ID: 5008)
CF Discontinuance	CF 377.4 SAR (6/13)	CF_TN_ACTION1 (ID: 4010)	CF_TN_MESSAGE1 (ID: 5011)

d. Add the following regulations for the new fragment:

Program	Regulation
CalFresh	MPP 63-300.2

e. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
CF Denial	FTP Eligibility Forms	NOA – CF – DE – FTP ELIG FORMS
CF Discontinuance	FTP Eligibility Forms	NOA – CF – DS – FTP ELIG FORMS

2.5 Correspondence: Add new Reason Fragment for Non-MAGI Medi-Cal

2.5.1 Overview

Create a NOA reason fragment to generate on the new Non-MAGI Medi-Cal NOAs for FTP Eligibility Forms.

2.5.2 Description of Change

1. Create the new reason fragment that will generate on a denial or discontinuance NOA when a Non-MAGI Medi-Cal person is denied or discontinued for failure status reason of 'FTP Eligibility Forms'.

NOA Template: MC 239

Program: Non-MAGI Medi-Cal

Action Type: Denial, Discontinuance

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes (NA_BACK9_FRAGMENT)

NOA Mockups/Examples: Refer to Section 3: Supporting Documents

Ordering on NOA: The new reason fragment will be after the action fragment.

Languages (13)**:** English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Hmong, Lao, Russian, Arabic, Farsi, Vietnamese

a. Create new Non-MAGI Medi-Cal reason fragments:

NOA	Description	Text	Formatting
Denial (Non-MAGI MC)	Static	Medi-Cal benefits are denied for: {PersonName} We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10
Discontinuance (Non-MAGI MC)	Static	Medi-Cal benefits will be discontinued for: {PersonName} We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork. You can still get Medi-Cal, but you need to give us more information. We need it within 90 days, by {DueDate}. We can give	Arial Font Size 10

NOA	Description	Text	Formatting
		you Medi-Cal from {DiscDate} if you are still eligible. If we do not get the information by {DueDate}, you must reapply for Medi-Cal.	

b. Add population logic for the new Non-MAGI Medi-Cal reason fragments:

Variable	Description	Population
PersonName	The name of the person.	This variable will be populated with the name of the person denied or discontinued for 'FTP Eligibility Forms'. If there is more than one person denied or discontinued for this same status reason, the names will be listed as follows: Person 1, Person 2, etc.
DiscDate	The discontinuance date of the person.	This variable will be populated with the discontinuance date of the person denied or discontinued for 'FTP Eligibility Forms'.
DueDate	The due date or deadline for the person.	This variable will be populated with the due date or deadline the person has to provide more information. This due date is currently the end of the month after 90 days from the person's discontinuance date.

c. Add generation logic for the new fragment. Generate the appropriate fragment on a Non-MAGI Medi-Cal denial or discontinuance NOA when the following is true:
    a. The Non-MAGI Medi-Cal person status is Denied or Discontinued

b. The Non-MAGI Medi-Cal person failed for the EDBC status reason of 'FTP Eligibility Forms'

d. Add the following regulation for the new Non-MAGI Medi-Cal fragments:

NOA	Regulation
Denial (Non-MAGI MC)	Title 22, CCR, Sections 50157, 50175, 50185, 50179
Discontinuance (Non-MAGI MC)	W&I Code Section 14005.37(i); Title 22, CCR, Sections 50157, 50175, 50185, 50179

e. The following are the action and message details for this FTP Eligibility Forms NOA:

NOA	Action Fragment	Message Fragment
Denial (Non-MAGI MC)	MC_DN_ACTION1 (ID: 4034)	MC_DN_MESSAGE4 (ID: 5074)
Discontinuance (Non-MAGI MC)	MC_TN_ACTION1 (ID: 4035)	MC_TN_MESSAGE5 (ID: 5058)

f. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
Denial (Non-MAGI MC)	FTP Eligibility Forms	NOA – MC – DE – FTP ELIG FORMS
Discontinuance (Non-MAGI MC)	FTP Eligibility Forms	NOA – MC – DS – FTP ELIG FORMS

2.6 Correspondence: Add new Reason Fragment for MAGI Medi-Cal

2.6.1 Overview

Create a NOA reason fragment to generate on the new MAGI Medi-Cal NOAs for FTP Eligibility Forms.

2.6.2 Description of Change

1. Create the new reason fragment that will generate on a discontinuance NOA when a MAGI Medi-Cal person is discontinued for failure status reason of 'FTP Eligibility Forms'.

   NOA Template: MC-MAGI-T (11/2015)

   Program: MAGI Medi-Cal

   Action Type: Discontinuance

   Fragment Level: Person

   Repeatable: No

   Include NA Back 9: Yes (NA_BACK_9_MAGI_FRAGMENT)

   NOA Mockups/Examples: Refer to Section 3: Supporting Documents

   Ordering on NOA: The new reason fragment will be after the action fragment.

   Languages (10)**:** English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Russian, Farsi, Vietnamese

   a. Create a new MAGI Medi-Cal reason fragment:

NOA	Description	Text	Formatting
Discontinuance (MAGI MC)	Static	We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10

   b. Add generation logic for the new fragment. Generate the appropriate fragment on a MAGI Medi-Cal discontinuance NOA when the following is true:
      c. The MAGI Medi-Cal person status is Discontinued
      d. The MAGI Medi-Cal person failed for the EDBC status reason of 'FTP Eligibility Forms'

   For example: A customer is initially granted MAGI eligibility. A worker processed the referral with 'Full Medi-Cal Hierarchy' and EDBC is run to make them active for MAGI Medi-Cal. The customer was later discontinued from MAGI. Additionally, as the customer

did not provide required Non-MAGI eligibility forms, the worker added a non-compliance record for FTP: Eligibility Forms. Due to the non-compliance record, the EDBC logic will discontinue them from Medi-Cal and generate a MAGI Discontinuance NOA populated with the FTP Eligibility Forms reason fragment.

c. Add the following regulation for the new MAGI Medi-Cal fragment:

NOA	Regulation
Discontinuance (MAGI MC)	W&I Code Section 14005.37(i); Title 22, CCR, Sections 50157, 50175, 50185, 50179

d. The following are details for this FTP Eligibility Forms NOA:

NOA	Type of Fragment	Fragment
Discontinuance (MAGI MC)	Header	H_STATIC_HEADER (ID: 4093)
	Action	H_TN_ACTION1 (ID: 4092)
	Message	H_TN_MESSAGE1 (ID: 5072)
	Footer	H_STATIC_FOOTER (ID: 5083)

e. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
Discontinuance (MAGI MC)	FTP Eligibility Forms	NOA – MC – HT – FTP ELIG FORMS

3 SUPPORTING DOCUMENTS

#	Functional Area	Description	Attachment
1	Client Correspondence	CW Denial Mockup NOA	208565_CW_FTPEligForm_DenialNOA.pdf
2	Client Correspondence	CW Discontinuance Mockup NOA	208565_CW_FTPEligForm_DiscNOA.pdf
3	Client Correspondence	CF Denial Mockup NOA	208565_CF_FTPEligForm_DenialNOA.pdf
4	Client Correspondence	CF Discontinuance Mockup NOA	208565_CF_FTPEligForm_DiscNOA.pdf
5	Client Correspondence	Non-MAGI MC Denial Mockup NOA	208565_ NonMAGI MC_FTPEligForm_DenialNOA.pdf
6	Client Correspondence	Non-MAGI MC Discontinuance Mockup NOA	208565_ NonMAGI MC_FTPEligForm_DiscNOA.pdf
7	Client Correspondence	MAGI MC Discontinuance Mockup NOA	208565_ MAGI MC_FTPEligForm_DiscNOA.pdf
8	Client Correspondence	Folder containing .xdp files of English, Spanish and applicable threshold languages for the FTP Eligibility Forms reason fragment of CW, CF, MC programs	CA 208565 - XDP.zip
9	Client Correspondence	Folder containing .pdf files of English, Spanish and applicable threshold languages for the FTP Eligibility Forms reason fragment of CW, CF, MC programs	CA 208565 - PDF.zip

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Workers will be able to fail a person or program with the following migrated into CalSAWS: 1) The Non-Compliance type: Failure to Provide, reason: Eligibility Forms and 2) The corresponding NOA reason fragment for new FTP NOAs.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218664

Update the GROW Orientation Appointment Job to no longer generate the ABP 1461-R

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sowmya Coppisetty
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/26/2020	1.0	Initial Design	Sowmya Coppisetty
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1 OVERVIEW

The batch job 'PB19C910' creates a GROW Orientation Activity for pending GROW programs when there is no orientation activity, or the first orientation activity was missed and triggers forms ABP 1461 and ABP 1461-R (Reschedule).

1.1 Current Design

Currently, Batch job 'PB19C910' creates a GROW Orientation Activity for pending GROW programs when there is no orientation activity, or the first orientation activity was missed and then triggers the below two forms:

1. ABP 1461 – This form is generated for cases where there does not exist a previously created GROW activity and/or a future dated GROW Orientation activity.
2. ABP 1461-R – This form is generated for cases where there exists a previously created GROW activity and/or there does not exist a future dated GROW orientation activity.

1.2 Requests

1. Update the GROW Orientation Appointment job to no longer generate the ABP 1461-R.
2. Remove ABP 1461-R form from the Template Repository.
3. Remove the 'Appointment Reschedule form' button from customer activity detail page.

1.3 Overview of Recommendations

1. Update the GROW orientation appointment batch to generate form ABP 1461 for the scenarios where the ABP 1461-R generates currently.
2. ABP 1461-R will be removed from the Template Repository and no longer be available in CalSAWS.
3. Remove the 'Appointment Reschedule form' button from customer activity detail page for the GROW program Orientation activity

1.4 Assumptions

None

2 RECOMMENDATIONS

2.1 Customer Activity Detail

2.1.1 Overview

Since the ABP 1461-R GROW Orientation Activity Appointment Reschedule form is being removed from the CalSAWS template repository, the Customer Activity Detail page will be updated to not display the 'Appointment Reschedule Form' button for an active or closed GROW Orientation activity that displays scheduled orientation activity start and end date and time.

2.1.2 Customer Activity Detail Page Mockup

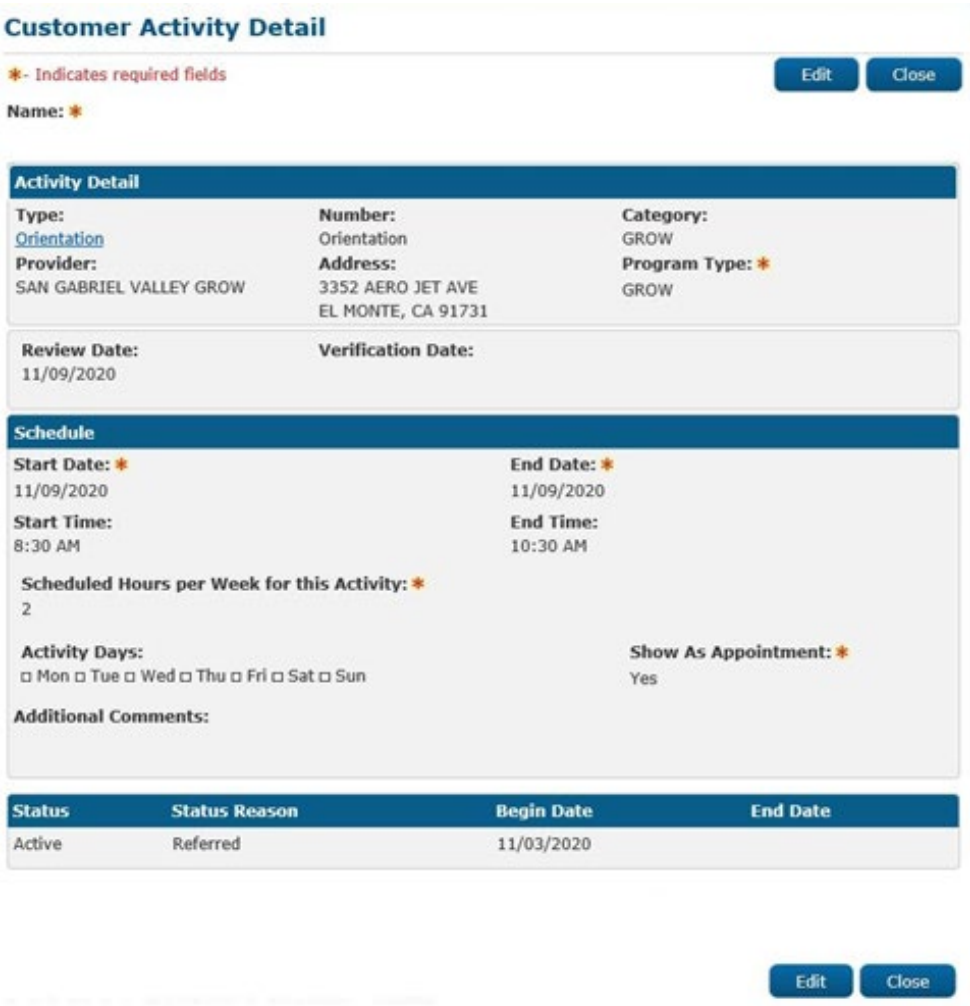

Figure 2.1.1 – Customer Activity Detail Page Name

2.1.3 Description of Changes

1. Update the Customer Activity Detail page to not display the 'Appointment Reschedule Form' button for the GROW program Orientation Activity.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Update the GROW Orientation batch job to no longer generate ABP1461-R

2.2.1 Overview

Currently, Batch job 'PB19C910' creates a GROW Orientation Activity for pending GROW programs when there is no orientation activity, or the first orientation activity was missed and then triggers below 2 forms

1. ABP 1461 – This form is generated for the case where there does not exist a previously created GROW activity and/or a future dated GROW Orientation activity.
2. ABP 1461-R - This form is generated for the cases where there exists a previously created GROW activity and/or there does not exist a future dated GROW orientation activity.

With this SCR, Batch job 'PB19C910' will be updated to no longer generate form ABP 1461-R and only generate form ABP 1461 where ABP 1461-R is currently being generated.

2.2.2 Description of Change

Update the batch job 'PB19C910' to also trigger form ABP 1461 for the below conditions:

1. Participant is Active in General Assistance/General Relief
2. Participant is Pending in GROW program
3. Batch Date is within GROW Work Registration's Effective Date Range
4. GROW Work Registration is either under Employment status or Unemployment status and Volunteer Status set to 'Y'
5. There does not exist a completed GROW orientation activity in the last 365 days
6. There does not exist a future dated GROW Orientation Activity
7. There does not exists a previously created GROW Orientation customer activity record that is in closed status and no-show status reason in the last 4 business days from the batch date for the program person.

2.2.3 Execution Frequency

Daily

2.2.4 Counties Impacted

Los Angeles County only

2.3 Remove ABP 1461-R from the Template Repository

2.3.1 Overview

The ABP 1461-R form is currently available to generate from the Template Repository.

2.3.2 Description of Change

Remove ABP 1461-R form from the Template Repository.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	The LRS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: a. E-Mail; b. Text messaging; d. Automated phone reminder; e. USPS mail; and f. YBN.	Update GROW orientation appointment batch to generate form ABP 1461 for the scenarios where the ABP 1461-R generates currently.

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-213979 – Convert to Stream Architecture – MEDS EW20, EW40, HA20, HI37, HI40, FX20, FX40 and FX60 Transactions

CalSAWS	DOCUMENT APPROVAL HISTORY	
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10/18/2020	0.1	Initial draft	Sivagami Nachiyappan, Naveen Kumar Bhumandla
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11/09/2022	0.3	Document updated	Balakumar Murthy

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1 OVERVIEW

Medi-Cal Eligibility Data System (MEDS) transactions listed below will be rearchitected to leverage the "Stream Processing Architecture".

- Report New Application (EW20) – Transmits data to the Medi-Cal Eligibility Data System (MEDS) to report persons who have become active on the programs required by MEDS, changes in Aid code, and updates to a person's SOC or obligation rate percentage in the application.
- MEDS Discontinued Update Writer (EW40) – Terminates Medi-Cal eligibility for a recipient and modifies the hold status reflected in the ELIG-STATUS element. EW40 is also triggered when the aid code moves from one 'Primary Segment' to another 'Special Segment' or 'Special Segment' to another 'Special Segment'.
- Report New Homeless Client (HA20) – Transmits data to the Medi-Cal Eligibility Data System (MEDS) when adults request Homeless Assistance on behalf of a child in their care and control.
- Report Private Health Insurance Information Change (HI37) – Transmits data to the Medi-Cal Eligibility Data System (MEDS) if there is a new other health coverage record and there is a change in a person's private health insurance and the person has active Medi-Cal eligibility for the current month.
- Casualty & Workers' Compensation Referrals (HI40) – Transmits data to the Medi-Cal Eligibility Data System (MEDS) when there is a new third-party liability record.
- Add New Food Stamp Recipient Record (FX20) - Transmits data to the Medi-Cal Eligibility Data System (MEDS) to report persons who have become active on CalFresh(CF)/Nutrition Benefit (NB) Transitional Nutrition Benefit (TNB)) program, changes in CF/TNB Aid code, changes in role code and add new ABAWD clock
- Food Stamp Termination (FX40) - Transmits data to the Medi-Cal Eligibility Data System (MEDS) if a participant is discontinued from CalFresh
- ABAWD Food Stamp 36-Month Calendar (FX60) - Transmits data to the Medi-Cal Eligibility Data System (MEDS) if a new CalFresh recipient is added to MEDS/CDB or eligibility is newly established for a person who received CalFresh before the ABAWD requirements

1.1 Current Design

Currently, all MEDS transactions run nightly on the batch framework. The data changes are made through the CalSAWS online application during the day. However, the same data changes are captured, processed into EW20, EW40, HA20, HI37, HI40, FX20, FX40, and FX60 transaction records, and sent to MEDS as part of an outbound file during the nightly batch process.

1.2 Requests

Refactor MEDS transactions to leverage "Stream Processing Architecture" to run during business hours. This will eliminate the number of processing batch jobs and reduces the number of batch jobs running during the batch window to accommodate all 58-counties in CalSAWS.

1.3 Overview of Recommendations

The MEDS transactions EW20, EW40, HA20, HI37, HI40, FX20, FX40, and FX60 will be rearchitected to leverage the "Stream Processing Architecture".

Changes made through online application will be retrieved and the corresponding IDs (System generated primary key for the tables) will be published to a source topic for downstream processing. No PII data will be stored in the source topic.

A streaming application will be monitoring the source topics, process the data, and sends the IDs of cases that need to be sent to MEDS to a sink topic.

A consumer application will process the data from the sink topic, generates MEDS transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

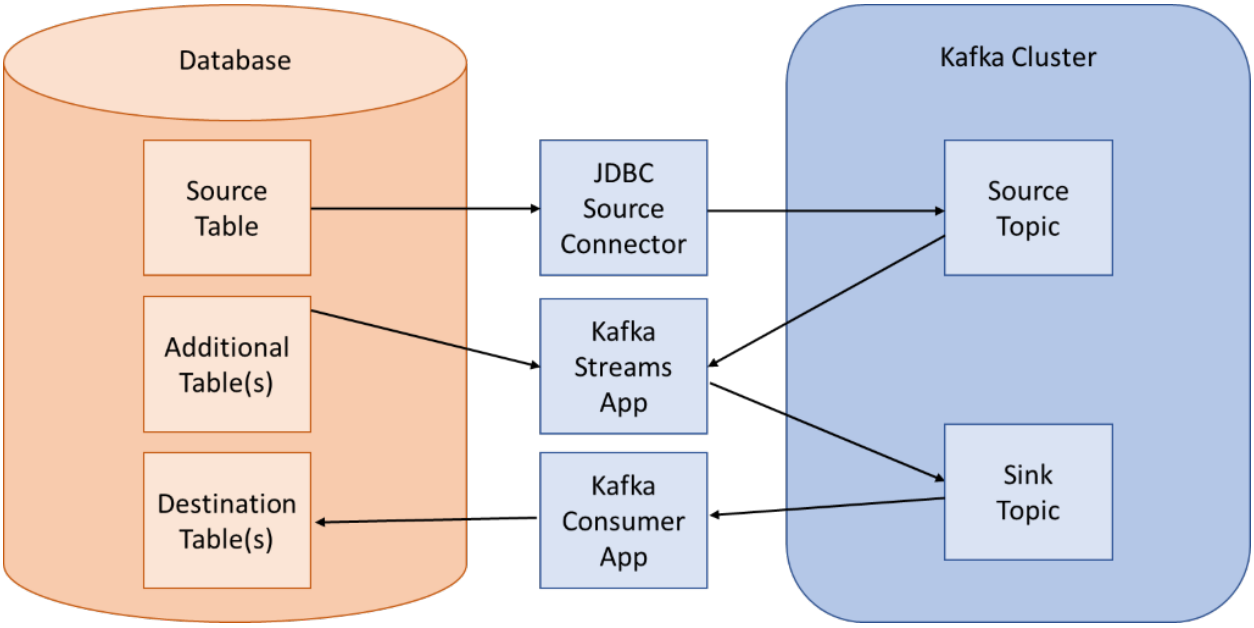

Figure 1. Streams Processing Architecture for MEDS Transaction

1.4 Assumptions

1. The new streaming application will have no functional differences from the existing EW20, EW40, HA20, HI37, HI40, FX20, FX40, and FX60 batch jobs
2. Data volume and data format should exactly match the current interface
3. Existing MEDS batch jobs will not be modified
4. As per current implementation, all the transactions will still be sent to MEDS in the nightly outbound file

2 RECOMMENDATIONS

2.1 MEDS Transaction – EW20

2.1.1 Overview

Batch Sweep for EW20 Background

Daily MEDS transactions are generated during a nightly batch process. The Report New Application (EW20) transaction is generated when the following conditions are met.

- Program persons who have become active from pending/denied/discontinued.
- Program person's aid code change.
- Program person's Share of Cost(SOC) change.
- Program person's Obligation rate percentage changes.

Current Architecture

Currently, there exist nightly batch jobs that capture the participant's program status changes, Aid code changes, and EDBC changes in intermediate tables in the CalSAWS. EW20 job queries the intermediate tables to process the participant data and generates EW20 transactions.

These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.1.2 Description of Changes

1. The below changes from the CalSAWS application will be retrieved and the corresponding IDs will be published to the source topics for the downstream application processing. No PII data will be stored in the source topic.
    i. Participant's program status
    ii. Participant's aid code
    iii. Participant's meds restriction indicator
    iv. Program's redetermination
    v. Changes to cash aid\Medi-Cal program's eligibility
    vi. SOC and obligation changes
2. The streaming applications will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be generated to a separate sink topic.
3. The EW20 Consumer applications will take data from the sink topics, generate EW20 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with the existing implementation, no duplicate records will be sent to MEDS.

2.2 MEDS Transaction – EW40

2.2.1 Overview

MEDS Discontinued Update Writer (EW40) Transaction Background

Daily MEDS transactions are generated during a nightly batch process. The MEDS Discontinued Update Writer (EW40) transaction is used to terminate Medi-Cal eligibility for a recipient and modify the hold status reflected in the ELIG-STATUS element. So, whenever there is a change in the below-listed information it will be sent to MEDS.

- Change in aid code from one segment to another segment.
- The status of the program changes from Active to discontinued.
- The role code changes.

Current Architecture

Currently, there exist nightly batch jobs that capture the termination of Medi-Cal eligibility in intermediate tables in the CalSAWS.

The MEDS Discontinued Update Writer (EW40) transaction job queries these intermediate tables to process the terminated Medi-Cal eligibility and generate EW40 transactions. These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.2.2 Description of Changes

1. The below changes in the CalSAWS application will be retrieved and the corresponding ID(s) will be published to a source topic for downstream processing. No PII will be stored in the source topic.
    i. Participant's program status
    ii. Participant's aid code
    iii. Participant's role code
    iv. Changes to cash aid\Medi-Cal program's eligibility
2. The streaming applications will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be generated to a separate sink topic.
3. A consumer application will take data from the source topic, generate EW40 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

2.3 MEDS Transaction – HA20

2.3.1 Overview

The Report New Homeless Client (HA20) Transaction Background

Daily MEDS transactions are generated during a nightly batch process. The Report New Homeless Client (HA20) transaction, which is generated for the participant requests Homeless Assistance or if any issuance has been made for this service.

Current Architecture

Currently, the Report New Homeless Client (HA20) transaction job identifies when an issuance or service arrangement has been made for a participant receiving Homeless Assistance. These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.3.2 Description of Changes

1. The below changes in the CalSAWS application will be retrieved and the corresponding ID(s) will be published to a source topic for downstream processing. No PII will be stored in the source topic. No PII data will be stored in the source topics.
    i. Service Arrangement changes
    ii. Participant's program status and eligibility
    iii. Participant's Aid code changes.
    iv. Issuances
2. A streaming application will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be sent to MEDS to a sink topic.
3. A consumer application will process the data from the sink topic, generate HA20 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

2.4 MEDS Transaction – HI37

2.4.1 Overview

MEDS- Report Private Health Insurance Information (HI37) Transaction Background

The MEDS- Report Private Health Insurance Information (HI37) transaction is generated to report if there is a new other health coverage record and person has active Medi-Cal eligibility in the current month

and whenever there is a change to the below-listed person's private health insurance coverage information.

- Policyholder Address and Phone Number
- Policy start and end date
- Other health Coverage Scope

Current Architecture

Currently, there exist nightly batch jobs that capture the changes to the Person's private health insurance information's and new other health coverage records are added in intermediate tables in the CalSAWS.

The MEDS- Report Private Health Insurance Information (HI37) transaction job queries these intermediate tables to process the healthcare changes and generate HI37 transactions. These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.4.2 Description of Changes

1. The below changes in the CalSAWS application will be retrieved and the corresponding ID(s) will be published to a source topic for downstream processing. No PII will be stored in the source topic.
    i. Policy Start Date
    ii. Policy End Date
    iii. Policy Holder Group\Employer Address Information
    iv. Policy number
    v. Policyholder Phone number\Extension number
    vi. Beneficiary Group number
    vii. Health insurance provider's name
    viii. Insurance provider's union Indicator
    ix. Medi-Cal services Indicator
    x. Medi-Cal supplement indicator
    xi. Medi-Cal coverage available through employer indicator
    xii. List of Illness
    xiii. Organization Name
    xiv. Coverage scope code
2. A streaming application will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be sent to MEDS to a sink topic.
3. A consumer application will process the data from the sink topic, generate H137 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

2.5 MEDS Transaction – HI40

2.5.1 Overview

MEDS-Casualty & Workers' Compensation Referrals (HI40) Transaction Background

Daily MEDS transactions are generated during a nightly batch process. The MEDS-Casualty & Workers' Compensation Referrals (HI40) transaction, which is generated to report a change in MEDS-Casualty & Workers' Compensation Referrals whenever there is a new third-party liability record.

Current Architecture

Currently, there exist nightly batch jobs that capture new third-party liability records in intermediate tables in the CalSAWS.
The MEDS-Casualty & Workers' Compensation Referrals (HI40) transaction job queries these intermediate tables to process the new third-party liability records and generate HI40 transactions. These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.5.2 Description of Changes

1. Third-party liability changes through the CalSAWS application will be retrieved and the corresponding third-party liability ID will be published to a source topic for downstream processing. No PII data will be stored in the source topic.
2. A streaming application will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be sent to MEDS to a sink topic.
3. A consumer application will take data from the source topic, generate HI40 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

2.6 MEDS Transaction - FX20

2.6.1 Overview

Add New Food Stamp Recipient Record (FX20) transaction

The Add New Food Stamp Recipient Record (FX20) transaction is generated to report

- CF/TNB program persons who have become active from pending/denied/discontinued.
- CF/TNB program person's aid code change.
- CF/TNB program person whose role code changed to Active from Financially Responsible - Excluded and Unaided Person.
- Add new ABAWD clock to active CF/TNB person.

Current Architecture

Currently, there exist nightly batch jobs that capture the participant's program status changes, Aid code changes, new ABAWD clock, and EDBC changes in intermediate tables in the CalSAWS. FX20 job queries the intermediate tables to process the participant data and generates FX20 transactions.

These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.6.2 Description of Changes

1. The below changes in the CalSAWS application will be retrieved and the corresponding ID(s) will be published to a source topic for downstream processing. No PII will be stored in the source topic
    i. Changes to participant's CF/TNB program status
    ii. Changes to CF/TNB participant's aid code
    iii. Changes to CF/TNB participant's new ABAWD clock
    iv. ABAWD time limit information
    v. Changes to CF/TNB participant's role code
2. A streaming application will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be sent to MEDS to a sink topic.
3. A consumer application will take data from the source topic, generate FX20 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

2.7 MEDS Transaction – FX40

2.7.1 Overview

Food Stamp Termination (FX40) Transaction Background

The Food Stamp Termination (FX40) transaction which is generated when a participant is discontinued from CalFresh.

Current Architecture

Currently, there exist nightly batch jobs that capture the changes to the program statuses that are added in intermediate tables in the CalSAWS.

The Food Stamp Termination (FX40) transaction job queries these intermediate tables to process the program status changes and generate FX40 transactions. These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.7.2 Description of Changes

1. The below changes in the CalSAWS application will be retrieved and the corresponding ID(s) will be published to a source topic for downstream processing. No PII will be stored in the source topic.
    i. Participant's program status
    ii. Participant's aid code
    iii. Participant's role code
    iv. Changes to CalFresh eligibility
    v. CalFresh Time limit
2. A streaming application will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be sent to MEDS to a sink topic.
3. A consumer application will process the data from the sink topic, generate FX40 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

2.8 MEDS Transaction – FX60

2.8.1 Overview

ABAWD Food Stamp 36-Month Calendar (FX60) Transaction Background

The ABAWD Food Stamp 36-Month Calendar (FX60) transaction is generated to report the ABAWD indicator and ABAWD effective date if a new CalFresh recipient is added or updated.

Current Architecture

Currently, there exist nightly batch jobs that capture the changes to the participant's ABAWD time limit status and adds them to the intermediate tables in the CalSAWS.

The FX60 transaction job queries these intermediate tables, process the ABAWD time limit status changes to generate FX60 transactions for all past months except current month changes.

On the first day of the month, job queries all the ABAWD changes happened only for the previous month in addition to the daily changes and generate FX60 transactions.

These transactions are staged in the MEDS transaction table for the final job to create an outbound file with all the transactions.

2.8.2 Description of Changes

Split the current job into two jobs as below.

1. Event streaming implementation to capture the changes that happened to the past months.

2. Monthly batch Job to run first of every month to sweep all the changes that happened only to the previous month.

Event Streaming Implementation:

1. The below changes in the CalSAWS application will be retrieved and the corresponding ID(s) will be published to a source topic for downstream processing. No PII will be stored in the source topic.
    i. Changes to CalFresh Time limit
    ii. Changes to CalFresh eligibility
2. A streaming application will be monitoring the source topics, process the data, and sends the IDs for the transactions that need to be sent to MEDS to a sink topic.
3. A consumer application will process the data from the sink topic, generate FX60 transactions using the existing logic, and stage them in the MEDS transaction table for the final job to create an outbound file. In alignment with existing implementation, no duplicate records will be sent to MEDS.

Monthly Job:

1. A new Monthly sweep job will be introduced to generate FX60 transaction only for the ABAWD time limit changes happened only for the previous month.
2. In alignment with the existing batch job, there will not be any change to the business logic and no duplicate records will be sent to MEDS.

2.9 Execution Frequency

1. Source Connector will be running 24X7
2. Streaming Application will be scheduled to run 24X7
3. Consumer Application will be scheduled to run every hour
4. New FX60 monthly job will be scheduled to run on the first business day of the month

2.10 Key Scheduling Dependencies

New FX60 monthly job and consumer Applications will set as a predecessor to the MEDS outbound writer job.

2.11 Counties Impacted

All counties.

2.12 Data Volume/Performance

N/A

2.13 Failure Procedure/Operational Instructions

Like the existing process, Batch\Tech Operation Support Team will evaluate errors, diagnose the issue, and work with the appropriate teams to resolve the failure.

2.14 Production Validation

After production deployment, both new streaming applications and existing batch jobs will be running parallel, after comparing the results existing job will be decommissioned.

Below is the production validation and comparison flow:

1. A separate MEDS file will be generated from the streaming application and will be made available in S3 to compare records with a nightly job.
2. Generated MEDS file from the streaming application will never be sent to meds till validation is complete.
3. Once the validation is complete, nightly batch jobs will be decommissioned gracefully, and the streaming application will start sending transactions to MEDS through the nightly file.
4. In addition to file comparison, a new batch job will be scheduled to send an email with processed record counts of streaming and nightly job for comparison.
5. FX60 monthly job will be validated in the lower environment by running the existing batch job in parallel to the new monthly job.

2.15 Enable Streaming Architecture/Operational Instructions

After validation, the nightly meds job will be turned off and the streaming application will be configured to send transactions to MEDS through the nightly file. With client approval, these actions will be taken through separate SCRs (BPCRs/BSCRs).

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214745 | DDID 2342

FDS: API - Appointment API

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/28/2020	1.0	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

This is a new API made available to expose the customer appointment data from the CalSAWS system. An API service to expose customer appointment data does not exist in the CalSAWS System.

1.2 Requests

Create a service that can retrieve, update, and create appointments.

1.3 Overview of Recommendations

1. Create a new endpoint to retrieve, update and create appointments.
2. Add filter criteria based on scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number, date, and status to limit the results returned.

1.4 Assumptions

1. Results returned will be paginated to 20 values by default.
2. Limit parameter will allow a maximum of 250 values. Requesting a larger value will result in a 400 error response.
3. Results are limited to county level data.
4. Code Table values in the appendix are subject to change.
5. Requests and Responses will use Code Table values as described in the appendix.

2 RECOMMENDATIONS

2.1 Appointments API

2.1.1 Overview

This API will expose the customer appointment data from the CalSAWS system.

2.1.2 Description of Changes

The Appointments API will include the following filters, data elements, and error handling. Please refer to the **appointments.html** document for the technical specifications and data element definitions.

2.1.3 Filters

The API will include the following query parameters for appointments:

1. EBT card number
2. Case number
3. Person Id
4. Document Id
5. Worker Number
6. Start Date
7. End Date
8. Status (CT 22)
9. Type Code (CT 291)

2.1.4 Request Body

The appointments API can be used to create an appointment in CalSAWS. The request must contain the following fields:

1. case_num
2. person_id
3. worker_num
4. type_code (CT 291)
5. sub_type_code (CT 10113)
6. stat_code (CT 22)
7. start_time
8. appt_date
9. duration

2.1.5 Response

The appointment API will return the following data elements:

1. start_time
2. stop_time
3. appt_date
4. confirm_ind
5. ivr_compl_ind
6. orig_start_time
7. orig_stop_time
8. orig_appt_date
9. stat_rsn_code
10. type_code
11. stat_code
12. loc_descr
13. appt_descr
14. id
15. office_name
16. appt_cmnt
17. sub_type_code

18. pers_id
19. case_id

2.1.6 Error Messages

The Appointment API will return error messages in the following Scenarios:

1. Bad request. body/parameter {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. Bad request. Request body/parameter {parameter name} was not found.
4. Request Timeout.
5. Internal Server Error.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	API	Detailed Endpoint document	appointments.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 2342	The CONTRACTOR shall create a service allowing 58 Counties to retrieve, update, and create appointments utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number, date and status. The service will return a list of appointments based on the search parameters provided by the user. When searching by date or status a worker number, case number, or person information will be required. 2) Allow users to update the status of an appointment and create new appointments based on identified worker availability from a separate	Create appointments API

	worker schedule API. This API will update and create appointments when called utilizing required data elements as specified by the CalSAWS Software.	

5 APPENDIX

This section contains the code table (CT) values that are currently used in the system. API users can use and expect these values as specified in the technical design

CT 22: status/stat_code
Canceled
Completed
No Show
Rescheduled
Scheduled
Showed

CT 291: type_code
Cal-Learn
Counselor Meeting
General Appointment
Group Meeting
GROW
Home Visit
IEVS Interview
Intake Interview
Meeting with Worker
Preventative Fraud Interview
Provider
QC Case Review
Re-Evaluation CW/CF Interview
Re-Evaluation Interview
Telephone CW/CF RE Interview
Telephone Interview
WTW/REP
YBN Appointment

CT 10113: sub_type_code
2nd Telephone Interview Recertification
Appraisal Appointment

CT 10113: sub_type_code
Assign Next Activity Appointment
Cal-Learn Non-Compliance Cause Determination
Cal-Learn Orientation
Case Management Appointment
Client Requested
Cure Sanction
DCFS Referral
Direct Rent
Exemption Expired Appointment
Fingerprinting
General Appointment
GR B&C Appointment
GR Case Manager
GR Denial Complaint
GR Employment Specialist
GR Hearings
GR JSTP Appointment
GR Medical
Group
GROW Hearing
Home Call
IFDS Appointment
Intake-follow-up Appointment
Issuance see Cashier
Issuance see Worker
Meeting
Mental Health Worker
MSUDRP Assessment
NHR Appointment
Non-Compliance Cause Determination
Non-Compliance Home Visit
Other
Other Non-client
Out of County EBT Transaction
Out of State EBT Transaction
Post Time Limit
PVS Appointment
Reaffirmation Group
Reaffirmation Non-Group
Reaffirmation Second Appt.

CT 10113: sub_type_code
Return GROW 85
Return Job Development
Sanction Home Visit
Screening & Intake Appointment
Screening Only
Second Parent
SSI 2nd Advocacy Mandatory
SSI Advocacy Follow-Up
SSI Advocacy Mandatory
SSI Advocacy Voluntary
SSIAP NSA with Worker
Telephone Interview Intake
Telephone Interview Recertification
Testing
Time Limit Review
Training
Verification Return
VIP Appointment
YBN Application Appointment

Type Code : Sub Type Code mapping

Type Code	Sub Type Code
Cal-Learn	Cal-Learn Non-Compliance Cause Determination
Cal-Learn	Cal-Learn Orientation
GROW	Case Management Appointment
GROW	GROW Hearing
GROW	Return GROW 85
GROW	Return Job Development
General Appointment	2nd Telephone Interview Recertification
General Appointment	Client Requested
General Appointment	Direct Rent
General Appointment	Fingerprinting
General Appointment	GR B&C Appointment
General Appointment	GR Case Manager
General Appointment	GR Denial Complaint
General Appointment	GR Employment Specialist
General Appointment	GR Hearings
General Appointment	GR JSTP Appointment
General Appointment	Group

General Appointment	Home Call
General Appointment	IFDS Appointment
General Appointment	Intake-follow-up Appointment
General Appointment	Issuance see Cashier
General Appointment	Issuance see Worker
Type Code	Sub Type Code
General Appointment	Meeting
General Appointment	Mental Health Worker
General Appointment	NHR Appointment
General Appointment	Other
General Appointment	Other Non-client
General Appointment	Out of County EBT Transaction
General Appointment	Out of State EBT Transaction
General Appointment	PVS Appointment
General Appointment	Reaffirmation Group
General Appointment	Reaffirmation Non-Group
General Appointment	Reaffirmation Second Appt.
General Appointment	SSI 2nd Advocacy Mandatory
General Appointment	SSI Advocacy Follow-Up
General Appointment	SSI Advocacy Mandatory
General Appointment	SSI Advocacy Voluntary
General Appointment	SSIAP NSA with Worker
General Appointment	Screening & Intake Appointment
General Appointment	Screening Only
General Appointment	Telephone Interview Intake
General Appointment	Telephone Interview Recertification
General Appointment	Testing
General Appointment	Training
General Appointment	VIP Appointment
General Appointment	Verification Return
General Appointment	YBN Application Appointment
Provider	GR Medical
Provider	MSUDRP Assessment
WTW/REP	Appraisal Appointment
WTW/REP	Cure Sanction
WTW/REP	General Appointment
WTW/REP	Non-Compliance Cause Determination
WTW/REP	Non-Compliance Home Visit
WTW/REP	Sanction Home Visit
WTW/REP	Time Limit Review

CT 23 : stat_rsn_code
Batch Initiated
Client Initiated
Interrupted
Rescheduled
Worker Initiated

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214751 | DDID 2348

FDS: API - Journal API

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

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1 OVERVIEW

1.1 Current Design

This is a new API made available to expose the Journal_Entry data object from the CalSAWS system. An API service to expose journal data does not exist in the CalSAWS System.

1.2 Requests

Create a service that returns all journal entries for a specific case.

1.3 Overview of Recommendations

1. Create a new endpoint to retrieve journal details.
2. Add filter criteria based on caseId, date, journal category and journal type to limit the results returned.

1.4 Assumptions

1. Results returned will be paginated to 20 values by default.
2. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
3. Results are limited to county level data.
4. Code Table values in the appendix are subject to change.
5. Requests and Responses will use Code Table values as described in the appendix.

2 RECOMMENDATIONS

2.1 Journal API

2.1.1 Overview

This API will expose the Journal_Entry data object from the CalSAWS system.

2.1.2 Description of Changes

The Journal API will include the following filters, data elements, and error handling. Please refer to the **journals.html** document for the technical specifications and data element definitions.

2.1.3 Filters

The API will include the following query parameters for Journal:

1. Case number (required)
2. Start Date
3. End Date
4. Journal Category Code (CT 278)
5. Journal Type (CT 141)

2.1.4 Response

The Journal API will return the following data elements:

1. short_descr
2. id
3. org_id
4. case_id
5. type_code
6. long_descr
7. wrkr_num_identif
8. class_code
9. contact_type_code
10. comnt
11. filter_code

2.1.5 Error Messages

The Journal API will return error messages in the following Scenarios:

1. Bad request. {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. A Journal with the specified {param name(s)} was not found.
4. Request Timeout.
5. Internal Server Error.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	API	Detailed Endpoint document	journals.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2348	The CONTRACTOR shall create a service for the 58 Counties that returns all journal entries for a specific case. The service will allow users to filter by case number, date, journal category and journal type. A list of all journal entries that meet the search criteria will be returned.	Create journal API

5 APPENDIX

This section contains the code table (CT) values that are currently used in the system. API users can use and expect these values as specified in the technical design.

CT 141: journal_type
Activity
Application Date/BDA
Appointment
Assessment
Assignment
Authorized Representative
Batch EDBC
Change Reported
Closure
Conversion
CWS General Ledger
CWS Interest Allocation
Data Removed
Deregister
Discontinuance
Document
File Location
Fiscal
ICT
IEVS
Intake

CT 141: journal_type
Interfaces
MCE Determination
MV Property Determination
Narrative
Notice of Action
Program Status Update
Recovery Account
Registration
RRR
Sanction Update
SB 87
Self Service
Special Circumstance
Work Registration Update
WTW

CT 278: category
All
Child Care
CWS SSAAP
CWS SSIAP
Eligibility
Employment Services
Fiscal
Fraud
Hearing
Interfaces
Quality Review

CalSAWS

California Statewide Automated Welfare System

Design Document

CA- 214894

DDID 1628

Task Management

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1 OVERVIEW

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

1.1 Current Design

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

CA-214893 migrated an initial population of C-IV System Automated Actions into the CalSAWS System. CA-214895 migrated a second population of C-IV System Automated Actions into the CalSAWS System.

1.2 Requests

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

1.3 Overview of Recommendations

1. Migrate a third population of the C-IV System Automated Action settings for automated tasks into the CalSAWS System.

1.4 Assumptions

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

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2 RECOMMENDATIONS

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

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

2.1.1 Overview

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

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

2.1.2 Automated Action Detail – Reference Example

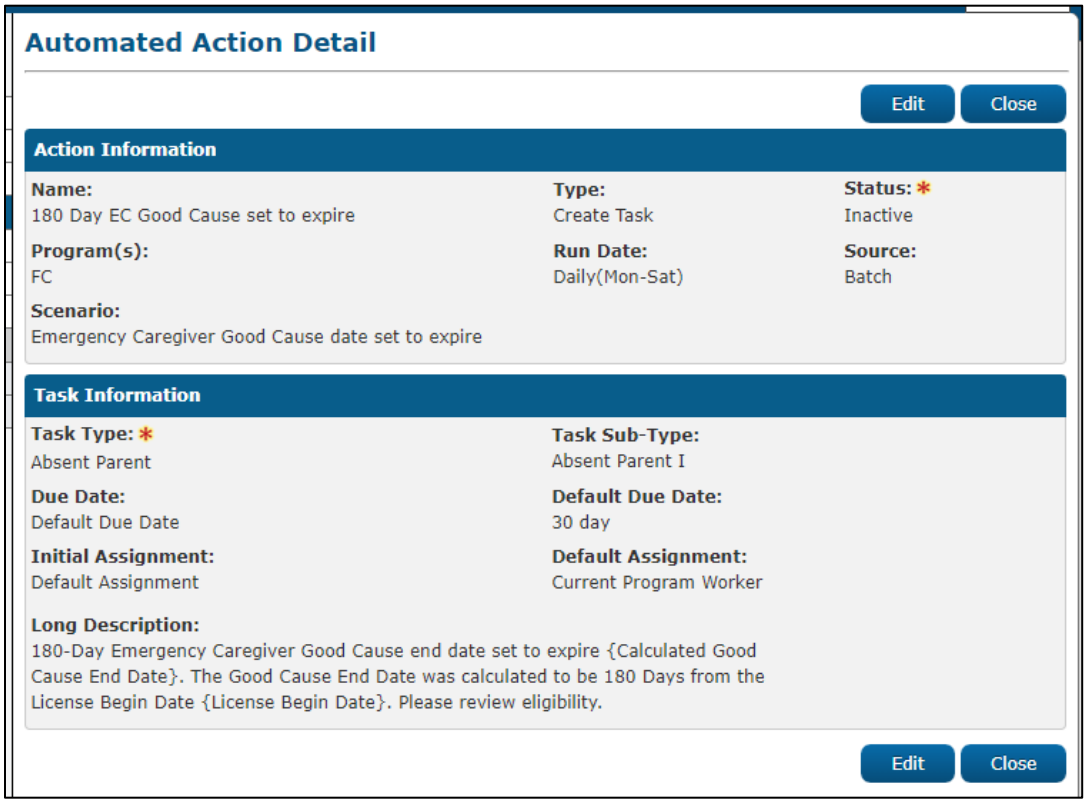

Figure 2.1.2.1 – Automated Action Detail

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2.1.3 Description of Changes

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

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

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

1. Foster Care Child: Permanency Plan Order Review
   a. Action Information
      i. Name: Foster Care Child: Permanency Plan Order Review
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): FC
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Foster Care child has been in foster care for 1 year, under the Child Welfare Services or Protective Custody programs. Review the permanency plan court order for the child.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: Last day of next month after batch date
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Verify a court finding was made on behalf of {child_name} and run EDBC to continue federal eligibility.

   c. Update CalSAWS to trigger the Automated Action by scheduling batch job PB00A115 to run on the 1st day of each month(Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A115 is

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currently available in the CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

2. Child Care Child: Parent Cal-Learn or CalWORKs Status Change
    a. Action Information
        i. Name: Child Care Child: Parent Cal-Learn or CalWORKs Status Change
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CC, CW, CL
        v. Run Date: 1st day of each month(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A Child Care child has been identified with parent's that have had a change in their Cal-Learn or CalWORKs status. The status has been changed to active, denied or discontinued on the current date. Review the child's Child Care program.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 5 business days after Batch date
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Cal-Learn or CalWORKs parent status has changed. Please review the Child Care program.

    c. Update CalSAWS to trigger the Automated Action by scheduling batch job PB00E137 to run on the 1st day of each month(Mon-Sat) and evaluate information for all 58 counties. Batch job PB00E137 is currently available in the CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

3. Kin-GAP Child: Age 5, 9, 12, or 15 Rate Change
    a. Action Information
        i. Name: Kin-GAP Child: Age 5, 9, 12, or 15 Rate Change
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): KG
        v. Run Date: 1st day of each month(Mon-Sat)
        vi. Source: Batch

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vii. Scenario: A Kin-GAP child, whose case dismissal date started prior to 1/1/2017, is turning 5, 9, 12, or 15 this month. Review for rate change.

b. Task Information
   i. Task Type: BLANK
   ii. Task Sub-Type: BLANK
   iii. Due Date: Default Due Date
   iv. Default Due Date: Last day of next month after batch date
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: {Child_Name} will turn {Age} this month. Run EDBC for future month to increase rate.

c. Update CalSAWS to trigger the Automated Action by scheduling batch job PB00A127 to run on the 1st day of each month(Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A127 is currently available in the CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

4. Welfare to Work Service: Closed With Active Certificate

The underlying conditions that trigger this Automated Action will not be migrated into CalSAWS per Phase 2 of DDID 1787. This Automated Action will be viewable in the CalSAWS System with a Status of "Unavailable". This status indicates that the Automated Action cannot be activated but it remains for historical reference. The entry is required to support conversion of C-IV county historical Tasks which resulted from this Automated Action so that the Task Detail page renders the "Automated Action" attribute properly.

a. Action Information
   i. Name: Welfare to Work Service: Closed With Active Certificate
   ii. Type: Create Task
   iii. Status: Unavailable
   iv. Program(s): WT
   v. Run Date: Daily(Mon-Sat)
   vi. Source: Batch
   vii. Scenario: A Welfare to Work service has been closed by Batch due to reaching its end date, but has at least one active certificate associated to it. Review the associated customer enrollment.

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b. Task Information
    i. Task Type: BLANK
    ii. Task Sub-Type: BLANK
    iii. Due Date: Default Due Date
    iv. Default Due Date: 7 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Service Activity Number {Activity Number} of type {Service Type Decode} offered by {Collaborator Name} (ID {Collaborator ID}) has been closed; {Customer Name} is enrolled in this activity.

5. Welfare to Work: Child Exemption Expiring
    a. Action Information
        i. Name: Welfare to Work: Child Exemption Expiring
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CW, WT
        v. Run Date: First business day of every month
        vi. Source: Batch
        vii. Scenario: The child that is the basis for their parents Welfare to Work exemption is turning 2 in two months. The exemption is granted for parents that care for a child that is 23 months or younger. Review Welfare to Work program for parents.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: Beginning of month of batch date plus two months
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: {Child_Name} will turn 2 on {birth_date}. Review case for WTW participation.

    c. Update CalSAWS to trigger the Automated Action by scheduling batch job PB00A135 to run on the first business day of every month and evaluate information for all 58 counties. Batch job PB00A135 is currently available in the CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

6. Foster Care/ARC: Non-Minor Dependent turning 21.
    a. Action Information

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i. Name: Foster Care/ARC: Non-Minor Dependent turning 21.
ii. Type: Create Task
iii. Status: Inactive
iv. Program(s): FC, AR
v. Run Date: Daily(Mon-Sat).
vi. Source: Batch
vii. Scenario: Batch has detected that a Foster Care or ARC Non-Minor Dependent will turn age 21 in the next 30 days.

b. Task Information
i. Task Type: BLANK
ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 30 Calendar days.
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: {pgm_name} Program: {Child_Name} will turn 21 on {birth_date}. Please review eligibility.

c. Implement a new batch job in CalSAWS to trigger the Automated Action for when a Foster Care or ARC Non-Minor Dependent is turning 21 in the next 30 days. **Technical:** Batch process (PB00A142) in the C-IV System can be referenced for the specific logic and conditions that trigger the Automated Action. Note that the C-IV System reference logic triggers the Automated Action with a scenario code of '137'. The scenario code for this Automated Action in CalSAWS will be 137, so the reference logic will require an adjustment to accommodate this scenario code change.

7. Kin-GAP: Non-Minor Dependent Turning 21
a. Action Information
i. Name: Kin-GAP: Non-Minor Dependent Turning 21
ii. Type: Create Task
iii. Status: Inactive
iv. Program(s): KG
v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: Batch has detected that a Kin-GAP Non-Minor Dependent will turn age 21 in the next 45 days

b. Task Information
i. Task Type: BLANK
ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 45 Calendar Days

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v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Kin-GAP Program: {Child_Name} will turn 21 on {Birth_Date}. Please Review Eligibility

c. Implement a new batch job in CalSAWS to trigger the Automated Action for when a Kin-GAP Non-Minor Dependent turns 21 in the next 45 days. **Technical:** Batch process (PB00A143) in the C-IV System can be referenced for the specific logic and conditions that trigger the Automated Action. Note that the C-IV System reference logic triggers the Automated Action with a scenario code of '138'. The scenario code for this Automated Action in CalSAWS will be 138, so the reference logic will require an adjustment to accommodate this scenario code change.

8. Provider TrustLine: Cleared
   a. Action Information
      i. Name: Provider TrustLine: Cleared
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CC
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Provider's TrustLine status has been cleared. Review Provider Certificates.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: 2 calendar weeks from the Batch Run Date
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: The TrustLine has been cleared for Provider {Provider_Name}. Please review Certificates in Pending TrustLine status for this provider.

   c. Update CalSAWS to trigger the Automated Action by scheduling batch job PB00A132 to run daily(Mon-Sat) to evaluate information for all 58 counties. Batch job PB00A132 is currently available in the CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

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9. Batch EDBC Discontinue: One Month
    a. Action Information
        i. Name: Batch EDBC Discontinue: One Month
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CW, CF
        v. Run Date: First business day of every month
        vi. Source: Batch
        vii. Scenario: Batch EDBC ran to discontinue a program for non-receipt of periodic report and resulted in a one-month EDBC. Review future months for discontinuance.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 day cutoff for program
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Review EDBC data for {Benefit_Month}. Batch Eligibility ran to discontinue the program for non-receipt of periodic report and resulted in a one-month EDBC. Future months need to be evaluated for discontinuance.

    c. Update the Batch EDBC processing in the CalSAWS System to trigger the Automated Action when a program is Discontinued for non-receipt of a periodic report and a one-month EDBC is resulting. **Technical:** Reference the logic within the Batch EDBC processing in the C-IV System that triggers the "A8" Automated Action scenario code and replicate this processing in the CalSAWS System with a scenario code of "AG".

10. Batch EDBC Discontinue: Read Only
    a. Action Information
        i. Name: Batch EDBC Discontinue: Read Only
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CW, CF
        v. Run Date: Second business day of every month
        vi. Source: Batch
        vii. Scenario: Batch EDBC ran to discontinue a program for non-receipt of periodic report and resulted in a read-only EDBC. Review program for discontinuance.

    b. Task Information
        i. Task Type: BLANK

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ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 10 day cutoff for program
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Review EDBC data for {Benefit_Month}. Batch Eligibility ran to discontinue the program for non-receipt of periodic report and resulted in a read-only EDBC.

c. Update the Batch EDBC processing in the CalSAWS System to trigger the Automated Action when a program is Discontinued for non-receipt of a periodic report and a read-only EDBC is resulting. **Technical:** Reference the logic within the Batch EDBC processing in the C-IV System that triggers the "A9" Automated Action scenario code and replicate this processing in the CalSAWS System with a scenario code of "AH".

11. CalWORKs Recipient: Role or Status Change
    a. Action Information
        i. Name: CalWORKS Recipient: Role or Status Change
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A CalWORKs recipient's role or status changed during EDBC processing. Review Welfare to Work program for potential impacts.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 5 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: The CW Role / Status for {program_person} has changed from {old_role} {old_status} to {current_role} {current_status}.

    c. Update EDBC processing in the CalSAWS System to trigger the Automated Action when a CalWORKs recipient's role or status changes as a result of EDBC. **Technical:** Reference the logic within the EDBC processing in the C-IV System that triggers the "10" Automated Action scenario code and replicate this processing in the CalSAWS System with the same scenario code of "10".

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12. Batch EDBC Program Skipped: Review Reason
    a. Action Information
        i. Name: Batch EDBC Program Skipped: Review Reason
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): AA, AR, HP, CW, IN, FC, DV, KG, MC, CF, HT, CP, RC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: EDBC was skipped for a case program during Batch processing. Review the skip reason and take appropriate action.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 day cutoff for program
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Review data and run EDBC for {Benefit Month}. Batch Eligibility did not process this program for the following reasons: {Exclusion Reasons}

    c. Update Batch EDBC processing in the CalSAWS System to trigger the Automated Action when the EDBC skips for a program. **Technical:** Reference the logic within the EDBC processing in the C-IV System that triggers the "88" Automated Action scenario code and replicate this processing in the CalSAWS System with the same scenario code of "88".

13. Medi-Cal Person: Pended by Cash aid Denial
    a. Action Information
        i. Name: Medi-Cal Person: Pended by Cash aid Denial
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: One or more persons has been pended during Batch Medi-Cal EDBC processing because of a denied cash aid application. Review Medi-Cal program.

    b. Task Information
        i. Task Type: BLANK

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ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 10 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: One or more persons have been automatically pended in the active Medi-Cal program. This occurred because the persons applied for cash aid but were denied.

c. Update Batch Medi-Cal EDBC processing in the CalSAWS System to trigger the Automated Action when the EDBC pends one or more persons during processing due to denied cash aid application. **Technical:** Reference the logic within the Batch Medi-Cal EDBC processing in the C-IV System that triggers the "A1" Automated Action scenario code and replicate this processing in the CalSAWS System with the same scenario code of "A1".

14. New SAVE Applicant abstract has been received.
    a. Action Information
        i. Name: New SAVE Applicant abstract has been received.
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CW, CF, CP, RC, MC, FC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A new SAVE applicant report has been assigned to a case. Review the SAVE report.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 30 days from Batch date
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: SAVE information is available for {CASE_NUMBER}

    c. Update the SAVE reader batch process in the CalSAWS System to trigger the Automated Action when a SAVE applicant report has been received and assigned to a case. **Technical:** The batch logic is set up to only fire the Automated Action if the county is not Los Angeles. Update this logic to trigger for all 58 counties. This Automated Action will initially be set to Inactive for Los Angeles county, however the county may choose to activate it. The

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process will trigger the "B6" Automated Action scenario code for this Automated Action.

15. Medi-Cal Person: Active by Cash aid Denial or Discontinuance
    a. Action Information
        i. Name: Medi-Cal Person: Active by Cash aid Denial or Discontinuance
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: Daily(Mon-Fri) or Real Time
        vi. Source: Batch/Online
        vii. Scenario: One or more persons has been made active during Medi-Cal EDBC processing because they were denied or discontinued from cash aid. Review Medi-Cal program.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: One or more persons have been automatically added to the active Medi-Cal program. This occurred because the persons were denied or discontinued from the cash aid.

    c. Update the EDBC processing in the CalSAWS System to trigger the Automated Action when one or more persons have been made active during Medi-Cal EDBC processing due to a denial or discontinuance from cash aid. **Technical:** The Automated Action will trigger with scenario code "A2".

16. Activity Closed: Service Arrangements Open
    a. Action Information
        i. Name: Activity Closed: Service Arrangements Open
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT, FT, CW, CL, CC
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A customer activity has been closed with open service arrangements. Review service arrangements and program requirements.

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b. Task Information
    i. Task Type: BLANK
    ii. Task Sub-Type: BLANK
    iii. Due Date: Default Due Date
    iv. Default Due Date: Immediately
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Customer Activity {Activity Number} has the following Service Arrangements {Service Arrangement Number} still open.

c. Update the CalSAWS System to trigger this Automated Action when a Customer Activity is closed and there exist open Service Arrangements. **Technical:** The Automated Action will trigger with scenario code "90".

17. Low-Income Referral Unlinked From Case: Review Images

The underlying conditions that trigger this Automated Action are deprecated. This Automated Action will be viewable in the CalSAWS System with a Status of "Unavailable". This status indicates that the Automated Action cannot be activated but it remains for historical reference. The entry is required to support conversion of C-IV county historical Tasks which resulted from this Automated Action so that the Task Detail page renders the "Automated Action" attribute properly.

a. Action Information
    i. Name: Low-Income Referral Unlinked From Case: Review Images
    ii. Type: Create Task
    iii. Status: Unavailable
    iv. Program(s): MC, CW, CF, RC
    v. Run Date: Real Time
    vi. Source: Online
    vii. Scenario: A Targeted Low Income Referral has been unlinked from the case. Review any associated images and move them over to the new case as needed.

b. Task Information
    i. Task Type: BLANK
    ii. Task Sub-Type: BLANK
    iii. Due Date: Default Due Date
    iv. Default Due Date: 10 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker

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vii. Long Description: Targeted Low-Income Referral {ictIdentif} has been unlinked from this case. There may be images associated to this case. Please review the images associated to the case and move them to the new case as necessary.

18. MAGI Medi-Cal Referral Unlinked From Case: Review Images
    a. Action Information
        i. Name: MAGI Medi-Cal Referral Unlinked From Case: Review Images
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A MAGI Medi-Cal Referral has been unlinked from the case. Review any associated images and move them over to the new case as needed.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: MAGI Referral {ictIdentif} has been unlinked from this case. There may be images associated to this case. Please review the images associated to the case and move them to the new case as necessary.

    c. Update the CalSAWS System to trigger this Automated Action when a MAGI Medi-Cal referral is unlinked from the case.
    Technical: The Automated Action will trigger with scenario code "B9".

19. Customer Report Failed: Review
    a. Action Information
        i. Name: Customer Report Failed: Review
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT, AA, FT, HP, CW, KG, MC, CF
        v. Run Date: Daily(Monday-Saturday)
        vi. Source: Batch
        vii. Scenario: A NOA or form was not produced as part of the Customer Reports Batch process. Review the case for missing

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Primary Applicant (PA), Primary Applicant Mailing Address, and/or Worker Assignment.

b. Task Information
   i. Task Type: BLANK
   ii. Task Sub-Type: BLANK
   iii. Due Date: Default Due Date
   iv. Default Due Date: 10 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Form/NOA generation failed for either no Primary Applicant (PA), No PA Mailing Address or no Worker Assignment.

c. Update the CalSAWS System to trigger this Automated Action when Batch generation of a Customer Report fails. **Technical:** Reference the logic within the Batch Customer Report processing in the C-IV System that triggers the "97" Automated Action scenario code and replicate this processing in the CalSAWS System with the same scenario code of "97".

20. CalHEERS VLP Step 3 File Size Exceeded
    a. Action Information
       i. Name: CalHEERS VLP Step 3 File Size Exceeded
       ii. Type: Create Task
       iii. Status: Inactive
       iv. Program(s): MC
       v. Run Date: Daily(Mon-Sat)
       vi. Source: VLP Interface
       vii. Scenario: A Verify Lawful Presence Step 3 Request cannot be sent because the image file size exceeds 5000kb.

    b. Task Information
       i. Task Type: BLANK
       ii. Task Sub-Type: BLANK
       iii. Due Date: Default Due Date
       iv. Default Due Date: 5 days
       v. Initial Assignment: Default Assignment
       vi. Default Assignment: Current Program Worker
       vii. Long Description: The VLP Step 3 Request image file size exceeded the 5000kb limit. Reference Number {DHSCaseNumber}, please review and take the appropriate action.

    c. Update the VLP Interface processing in CalSAWS System (PO00E914) to trigger the Automated Action when the file size

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exceeds the 5000kb limit. **Technical:** Reference the logic within the Vlp Interface processing in the C-IV System that triggers the "V3" Automated Action scenario code and replicate this processing in the CalSAWS System with the same scenario code of "V3". Note that the CalSAWS System currently has the processing for evaluating for the file size, the logic will be adjusted to trigger the Automated Action.

21. Kiosk: Documents Uploaded

    The underlying conditions that trigger this Automated Action are deprecated. This Automated Action will be viewable in the CalSAWS System with a Status of "Unavailable". This status indicates that the Automated Action cannot be activated but it remains for historical reference. The entry is required to support conversion of C-IV county historical Tasks which resulted from this Automated Action so that the Task Detail page renders the "Automated Action" attribute properly.

    a. Action Information
        i. Name: Kiosk: Documents Uploaded
        ii. Type: Create Task
        iii. Status: Unavailable
        iv. Program(s): WT, AA, AR, FT, HP, CW, FC, IN, CC, CL, DV, KG, MC, CS, CF, HT, CP, IH, LS, RC, GA
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: Documents were uploaded to the case from a lobby kiosk. Review documents.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 3 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Images were uploaded by the customer at the lobby kiosk. The images associated to this case will be available for review the next day.

22. Provider TrustLine: Status Change

    The underlying conditions that trigger this Automated Action are to support specific Trustline forms that will not be available in CalSAWS, as a result, the Task is also deprecated. This Automated Action will be viewable in the CalSAWS System with a Status of "Unavailable". This status indicates that the Automated Action cannot be activated but it

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remains for historical reference. The entry is required to support conversion of C-IV county historical Tasks which resulted from this Automated Action so that the Task Detail page renders the "Automated Action" attribute properly.

a. Action Information
   i. Name: Provider TrustLine: Status Change
   ii. Type: Create Task
   iii. Status: Unavailable
   iv. Program(s): CC
   v. Run Date: Daily(Mon-Sat)
   vi. Source: Batch
   vii. Scenario: A Provider TrustLine status has changed. Review the TrustLine application for its payment stop date.

b. Task Information
   i. Task Type: BLANK
   ii. Task Sub-Type: BLANK
   iii. Due Date: Default Due Date
   iv. Default Due Date: 30 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Trustline Application was {STATUS} for the Child Care Provider {ORG_NAME} (ID: {ORG_ID}). The Payment Stop Date is {PMT_STOP_DATE}.

3 SUPPORTING DOCUMENTS

N/A – No Supporting Documents

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1628	The CONTRACTOR shall migrate the existing C-IV automated tasks, as specified in the "Task Management C-IV Automated Task Inventory" appendix, into the CalSAWS Software for	- Approximately 22 C-IV automated actions directly overlap with LRS automated tasks. - Support for	This design will migrate a third population of C-IV System automated tasks into the LRS/CalSAWS System as the third phase of DDID 1628.

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	all 58 Counties; as well as migrate current task configurations for 39 C-IV Migration Counties into the CalSAWS Software as default settings for the 39 C-IV Migration Counties.	mapping CalWIN automated tasks to C-IV automated tasks is not included. - Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'C-IV Automated Tasks'	

5 MIGRATION IMPACTS

N/A

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6 OUTREACH

N/A

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7 APPENDIX

N/A

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214898

DDID 1629

Task Management

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1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

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

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2 RECOMMENDATIONS

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

2.1 Update CalSAWS Automated Tasks Per Automated Action Framework

2.1.1 Overview

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

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

2.1.2 Automated Action Detail – Reference Example

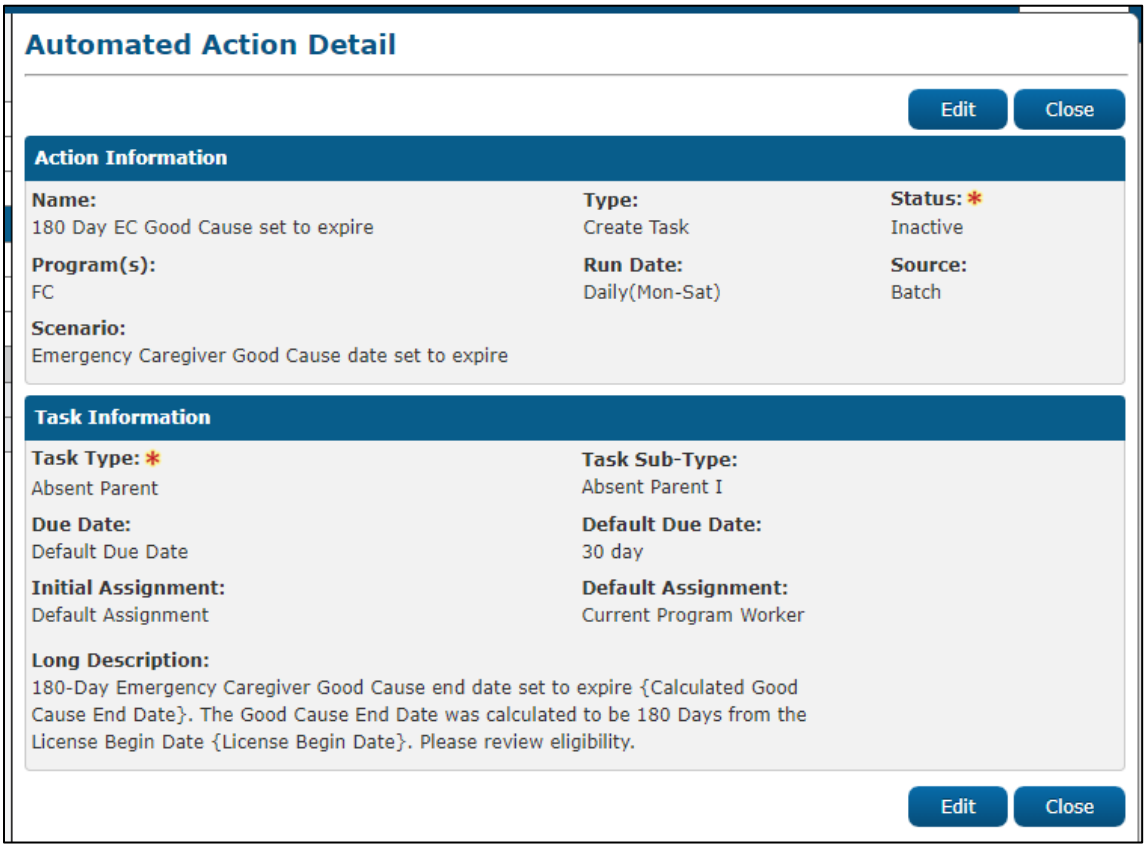

Figure 2.1.1 – Automated Action Detail

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2.1.3 Description of Changes

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

Technical: The below Automated Actions will be available and Active for LA county as the automated Tasks currently exist within the CalSAWS System. For the C-IV and CalWIN counties, the Status will initially be Inactive with a blank Task Type and Task Sub-Type. This is because each county can set a custom Task Type for each Automated Action. If a C-IV or a CalWIN county decides to Activate one of these Automated Actions, the page validation will require that the county also select a Task Type to be used. The subset of Automated Actions defined below that currently exist in the C-IV System will have a status of Inactive and a blank Task-Type and Sub-Type. The conversion processes that will bring the C-IV counties to the CalSAWS System will bring over the county specific configurations for these Automated Actions that exist in the C-IV System at the time of cutover.

Attribute values such as "Program(s)" and "Run Date" are based on the existing logic of the automated Task in the CalSAWS System. The current processing was evaluated to determine which programs the Task is applicable to, how the due date is calculated and when the automated Task creation runs.

1. Address: Updated by Welfare to Work Worker
    a. Action Information
        i. Name: Address: Updated by Welfare to Work Worker
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): WT
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: Address information has been updated by a Welfare to Work worker.

    b. Task Information
        i. Task Type: WTW Updated the Address Information
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 15 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker

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vii. Long Description: A WTW worker or supervisor has updated address information. Take appropriate action.

2. Birth/Death: Verification Needed
   a. Action Information
      i. Name: Birth/Death: Verification Needed
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CW, RC, GR, CF, MC
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A birth or death has not been verified. Also triggers if a PA 230 form has been sent out that has not been received. Take appropriate action.

   b. Task Information
      i. Task Type: Document/Verification not Received
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 2 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Review documentation and update case information accordingly.

   c. Modify the batch process (PB19A247) to evaluate data for all CalSAWS counties. The batch job name is currently configured for a single county code of 19. The updated batch process name will be PB00A247.

3. Welfare to Work: Sanction - Review for CalFresh Disqualification
   a. Action Information
      i. Name: Welfare to Work: Sanction - Review for CalFresh Disqualification
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CF, WT
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A participant is Active on CalWORKs and CalFresh and the Welfare to Work program has become Sanction. Take appropriate action.

   b. Task Information
      i. Task Type: WTW Sanction - Review for CF Disqualification
      ii. Task Sub-Type: N/A

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iii. Due Date: Default Due Date
iv. Default Due Date: 1 day
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: The WTW program status is Sanction. Review the case and confirm if a CalFresh exemption exists, if not, add a WTW record to the Eligibility Non-Compliance page for CalFresh. The Begin Date should be of first of month with adequate notice and no End Date should be entered. Run EDBC to apply the CF Disqualification.

c. Modify the batch process (PB19A255) to evaluate data for all CalSAWS counties. The batch job name is currently configured for a single county code of 19. The updated batch process name will be PB00A255.

4. Welfare to Work: Sanction Ended - Update CalFresh Disqualification
   a. Action Information
      i. Name: Welfare to Work: Sanction Ended - Update CalFresh Disqualification
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CF, WT
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Welfare to Work program has moved from Sanction to Active and the participant is Active on CalWORKs and CalFresh. Take appropriate action.

   b. Task Information
      i. Task Type: WTW Sanction Ended - Update CF Disqualification
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 1 day
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: The WTW program status is no longer Sanction. Contact the participant to confirm if they want to re-establish eligibility. Review the case to confirm if the CalFresh Disqualification on the Non-Compliance page should be removed or end-dated and run EDBC. When disqualification ends, CalFresh benefits must be reinstated on the 1st of next month.

   c. Modify the batch process (PB19A256) to evaluate data for all CalSAWS counties. The batch job name is currently configured for

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a single county code of 19. The updated batch process name will be PB00A256.

5. Welfare to Work: CalFresh Disqualification Ending
   a. Action Information
      i. Name: Welfare to Work: CalFresh Disqualification Ending
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CF, WT
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A CalFresh Disqualification period is ending and the participant is Active on CalWORKs. Take appropriate action.

   b. Task Information
      i. Task Type: Contact Participant - End of Disqualification Period for WTW Sanction
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 10 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: The CalFresh Disqualification period is ending. Contact the participant to confirm if they want to re-establish eligibility following the completion of the Disqualification period. Review the CalFresh program to confirm if CalFresh Disqualification record on the Eligibility Non-Compliance page should be end-dated and run EDBC.

   c. Modify the batch process (PB19A257) to evaluate data for all CalSAWS counties. The batch job name is currently configured for a single county code of 19. The updated batch process name will be PB00A257.

6. Child Care Participant: Cal-Learn Deregistered
   a. Action Information
      i. Name: Child Care Participant: Cal-Learn Deregistered
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CC, CL
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Child Care participant has been Deregistered from Cal-Learn. Take appropriate action.

   b. Task Information

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

c. Modify the batch process (PB19A234) to evaluate data for all CalSAWS counties. The batch job name is currently configured for a single county code of 19. The updated batch process name will be PB00A234.

7. Child Care Participant: WTW/REP Sanctioned
   a. Action Information
      i. Name: Child Care Participant: WTW/REP Sanctioned
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CC, RE, WT
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Child Care participant is associated to a WTW or REP program that has become Sanctioned. Take appropriate action.

   b. Task Information
      i. Task Type: Participant has been Sanctioned
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 7 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: The participant has been Sanctioned.

   c. Modify the batch process (PB19A232) to evaluate data for all CalSAWS counties. The batch job name is currently configured for a single county code of 19. The updated batch process name will be PB00A232.

8. Payment Request: Receipt Overdue
   a. Action Information
      i. Name: Payment Request: Receipt Overdue
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CL, RC, RE, WT
      v. Run Date: Daily(Mon-Sat)

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vi. Source: Batch
vii. Scenario: A verification receipt for a payment request issuance is 10 days overdue. Take appropriate action.

b. Task Information
i. Task Type: Receipts are 10 days overdue.
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 7 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: No verification receipt received from participant after 10 days.

c. Modify the batch process (PB19A259) to evaluate data for all CalSAWS counties. The batch job name is currently configured for a single county code of 19. The updated batch process name will be PB00A259.

9. Self Employment: Expenses Reported
a. Action Information
i. Name: Self Employment: Expenses Reported
ii. Type: Create Task
iii. Status: Active
iv. Program(s): All Programs
v. Run Date: Real Time
vi. Source: Online
vii. Scenario: A recipient has reported self employment expenses. Take appropriate action.

b. Task Information
i. Task Type: Participant Reported Self Employment
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 15 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Case Carrying Worker
vii. Long Description: Participant reported Self-Employment and provided expense receipts to the WTW Worker.

c. The Default Assignment value of "Case Carrying Worker" will employ the same logic that is currently used in the CalSAWS System for this automated Task, which will retrieve the programs available for the Case and assign the Task to the worker associated to the highest priority program. Note: This is the default assignment that will be set to preserve current functionality

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available for Los Angeles county. The county may change the assignment options on the Automated Action Detail page as needed.

d. **Technical:** Modify the logic in the expense controller to set the Category of the Task based on the Category value of the Task Type.

10. Living Arrangement: Homeless Reported
    a. Action Information
        i. Name: Living Arrangement: Homeless Reported
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): All Programs
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A homeless living arrangement has been entered for the case. Take appropriate action.

    b. Task Information
        i. Task Type: Participant reported Homeless situation
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: {Worker} changed Living Arrangement Type to "Homeless" for this case.

11. Cal-Learn Recipient: Progress of Satisfactory Bonus
    a. Action Information
        i. Name: Cal-Learn Recipient: Progress of Satisfactory Bonus
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CL
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: Cal-Learn progress has been logged with a status of Satisfactory Bonus.

    b. Task Information
        i. Task Type: Satisfactory Progress Bonus Recommended
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment

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vi. Default Assignment: Current Program Worker
vii. Long Description: A Cal-Learn Satisfactory Progress Bonus has been recommended.

12. Cal-Learn Program: Discontinued
    a. Action Information
        i. Name: Cal-Learn Program: Discontinued
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CL
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A Cal-Learn program has been Discontinued. Take appropriate action.

    b. Task Information
        i. Task Type: Cal-Learn discontinued
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Cal-Learn discontinued

    c. Modify the batch process (PB00A139) to evaluate data for all CalSAWS counties. The batch job is currently configured for a single county code of 19.

13. Foster Care Program: Rate Threshold
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.
    a. Action Information
        i. Name: Foster Care Program: Rate Threshold
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): FC
        v. Run Date: Monthly(Last day of the month)
        vi. Source: Batch
        vii. Scenario: The Foster Care rate exceeds the standard rate. Please take appropriate action.

    b. Task Information
        i. Task Type: Foster Care Rate Threshold
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date

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iv. Default Due Date: 30 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Foster Care Case # {casenumber} standard rate of {rateAmount} exceeds the standard rate

14. Foster Care Program: Demographic Mismatch
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

a. Action Information
i. Name: Foster Care Program: Demographic Mismatch
ii. Type: Create Task
iii. Status: Active
iv. Program(s): FC
v. Run Date: Daily(Mon-Fri)
vi. Source: Batch
vii. Scenario: The first name, last name, middle name, gender, CIN, SSN or DOB information received mismatch the Foster Care program demographic information. Please take appropriate action.

b. Task Information
i. Task Type: Demographic Mismatch
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 7 Days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Foster Care Case # {casenumber} received with demographic mismatches: {dataMismatch}

15. Foster Care Program: Placement Back Dated
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

a. Action Information
i. Name: Foster Care Program: Placement Back Dated
ii. Type: Create Task
iii. Status: Active
iv. Program(s): FC
v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: Foster Care child placement information has been received with a begin date in the past. Please take appropriate action.

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b. Task Information
    i. Task Type: Reapplication for Child Placement
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 10 Days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Child Placement received with begin date of {BEGIN_DATE}. Please review child placement update, reapply and run EDBC.

16. CalHEERS VLP Received: Step 2
    a. Action Information
        i. Name: CalHEERS VLP Received: Step 2
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): MC
        v. Run Date: Real Time
        vi. Source: VLP Interface
        vii. Scenario: A Verify Lawful Presence Step 2 transaction is received from CalHEERS, containing results for a previously opened Verify Lawful Presence Step 2 Request.

    b. Task Information
        i. Task Type: CalHEERS VLP Step 2 Response Received
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 5 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: A VLP Step 2 response has been received from CalHEERS. Reference Number {DHSCaseNumber}, please review and take the appropriate action.

17. CalHEERS VLP Received: Step 3
    a. Action Information
        i. Name: CalHEERS VLP Received: Step 3
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): MC
        v. Run Date: Real Time
        vi. Source: VLP Interface

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vii. Scenario: A Verify Lawful Presence Step 3 transaction is received from CalHEERS, containing results for a previously opened Verify Lawful Presence Step 3 Request.

b. Task Information
   i. Task Type: CalHEERS VLP Step 3 Response Received
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 5 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: A VLP Step 3 response has been received from CalHEERS. Reference Number {DHSCaseNumber}, please review and take the appropriate action.

18. Batch EDBC MAGI Medi-Cal Negative Action Skipped: Review Reason
    a. Action Information
       i. Name: Batch EDBC MAGI Medi-Cal Negative Action Skipped: Review Reason
       ii. Type: Create Task
       iii. Status: Active
       iv. Program(s): MC
       v. Run Date: Daily(Mon-Sat)
       vi. Source: Batch
       vii. Scenario: EDBC was skipped for MAGI Medi-Cal during Batch Negative Action processing. Review the skip reason and take appropriate action.

    b. Task Information
       i. Task Type: MAGI Eligibility - Negative Action
       ii. Task Sub-Type: N/A
       iii. Due Date: Default Due Date
       iv. Default Due Date: 10 days
       v. Initial Assignment: Default Assignment
       vi. Default Assignment: Current Program Worker
       vii. Long Description: Review data and request MAGI with Negative Action for {negative_action_reason} for {effective_month}. MAGI eligibility for Negative Action for {negative_action_reason} did not process this program for the following reasons: {skip_reason}.

19. EPPIC Issuance: Missing in Fiscal History
    a. Action Information
       i. Name: EPPIC Issuance: Missing in Fiscal History
       ii. Type: Create Task
       iii. Status: Active
       iv. Program(s): CP, CW, FS, GA, HP, HT, IN

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v. Run Date: Daily(Mon-Sun)
vi. Source: Batch
vii. Scenario: A benefit was issued through the EPPIC system that was not found on the Fiscal History page. Please take appropriate action.

b. Task Information
i. Task Type: EPPIC Issuance Not in LRS
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 7 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: A benefit issued external to the SAWS system was not found on the Fiscal History page. If recording payment is required, please contact the Cashier.

c. Update the Task Type name from "EPPIC Issuance Not in LRS" to "External Issuance Not in SAWS" for Los Angeles county.

d. This Automated Action will trigger with batch process (PIXXF408). Note: DDID 1787 replicates this batch process for C-IV System counties only.

20. ICT Unlinked From Case: Review Images
a. Action Information
i. Name: ICT Unlinked From Case: Review Images
ii. Type: Create Task
iii. Status: Active
iv. Program(s): MC, CW, CF, RC
v. Run Date: Real Time
vi. Source: Online
vii. Scenario: An ICT has been unlinked from the case. Review any associated images and move them over to the new case as needed.

b. Task Information
i. Task Type: ICT Unlinked
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 10 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: ICT ID {ictIdentif} has been unlinked from this case. There may be images associated to this case. Please

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review the images associated to the case and move them to the new case as necessary.

21. Medi-Cal Program: Juvenile Probation Information Received
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county as the batch process (PI19C808) has not been replicated for additional counties per DDID 1787.

    a. Action Information
        i. Name: Medi-Cal Program: Juvenile Probation Information Received
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): MC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: Juvenile probation information has been received. Take appropriate action.

    b. Task Information
        i. Task Type: Pending Juvenile Probation information. Print the EW32 transaction form to suspend MC
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Office Distribution
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Information received on juveniles placed in custody, re-evaluate ongoing eligibility .Print the EW32 transaction form to suspend MC

22. Medi-Cal Program: Juvenile Probation Released/Deceased
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county as the batch process (PI19C808) has not been replicated for additional counties per DDID 1787.

    a. Action Information
        i. Name: Medi-Cal Program: Juvenile Probation Released/Deceased
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): MC
        v. Run Date: Daily(Mon-Sat)

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vi. Source: Batch
vii. Scenario: Juvenile probation information has been received indicating that the minor has been released from probation or is now deceased. Take appropriate action.

b. Task Information
i. Task Type: Pending Juvenile Probation information. Minor has been released from Probation or is deceased
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 10 days
v. Initial Assignment: Office Distribution
vi. Default Assignment: Current Program Worker
vii. Long Description: Information received on juveniles placed in custody, minor has been released from Probation or is deceased.

23. IHSS Application: Pending Approaching 30 Days
a. Action Information
i. Name: IHSS Application: Pending Approaching 30 Days
ii. Type: Create Task
iii. Status: Active
iv. Program(s): IH
v. Run Date: Daily(Mon-Fri)
vi. Source: Batch
vii. Scenario: A pending Medi-Cal application for IHSS is approaching 30 days. Take appropriate action.

b. Task Information
i. Task Type: Pending Medi-Cal Application for IHSS is approaching 30 days
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 10 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Pending Medi-Cal Application for IHSS is approaching 30 days

c. Update the Task Type name "Pending Medi-Cal Appliciation for IHSS is approaching 30 days" to "Pending Medi-Cal Application for IHSS is approaching 30 days"

d. Modify the batch process (PB19C412) to evaluate data for all CalSAWS counties as (PB00C412). The batch job is currently configured for a single county code of 19.

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24. CMIPS II: Potential Information Change
    a. Action Information
        i. Name: CMIPS II: Potential Information
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): IH
        v. Run Date: Daily(Mon-Fri)
        vi. Source: Batch
        vii. Scenario: A transaction was received from CMIPS II indicating a potential change to income and/or resource information. Review and take appropriate action.

    b. Task Information
        i. Task Type: Potential Change to Income and/or Resource Information from CMIPS II
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: A 'Notification to SAWS of Potential Change to Income and/or Resource Information from CMIPS II'. Please review case.

    c. Note: This Automated Action batch processes (PB19C411/PB19C409) have been replicated for C-IV System counties only per DDID 1787.

25. IEVS Report: Pending CYA Abstract
    a. Action Information
        i. Name: IEVS Report: Pending CYA Abstract
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CW, CF, MC, RC, CP, FC, AR
        v. Run Date: Daily(Mon-Fri)
        vi. Source: Batch
        vii. Scenario: A CYA abstract is pending. Review and take appropriate action.

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

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

vi. Long Description: Review CYA Abstract and take appropriate action

26. IEVS Report: IFDS Match Under 2500
    a. Action Information
        i. Name: IEVS Report: IFDS Match Under 2500
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CW, CF, MC, RC, CP, FC, AR
        v. Run Date: Monthly(1st and 20th day)
        vi. Source: Batch
        vii. Scenario: An IFDS abstract has been received with an under $2500 discrepancy. Review and take appropriate action.

    b. Task Information
        i. Task Type: IFDS Income Match - Under $2500 discrepancy
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 20 days
        v. Assignment

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

        vi. Long Description: Review IFDS Abstract and take appropriate action

27. New Vendor: Pending
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.
    a. Action Information
        i. Name: New Vendor: Pending

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ii. Change Type: Create Task
iii. Status: Active
iv. Program(s): FC
v. Run Date: Daily(Mon-Fri)
vi. Source: Batch
vii. Scenario: A DCFS Vendor has been created and is Pending. Take appropriate action.

b. Task Information
i. Task Type: Pending Vendor
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 7 Days
v. Initial Assignment: Default Assignment
vi. Default Assignment: DCFS Worker
vii. Long Description: Pending Vendor. Org Name: {orgName}, Org Id: {orgId}, Org Xref: {orgXref}

c. The current assignment logic for this automated Task selects a random active position within the county that is configured to receive DCFS Task Categories. The Default Assignment value of "DCFS Worker" replicates this same assignment processing.

28. Cal-Learn Program: Progress Ending
a. Action Information
i. Name: Cal-Learn Program: Progress Ending
ii. Change Type: Create Task
iii. Status: Active
iv. Program(s): CL
v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: Cal-Learn progress is ending in 10 days, review and add a report card schedule as needed.

b. Task Information
i. Task Type: Add Report Card Schedule
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 30 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Add Report Card Schedule for Cal-Learn Participant

c. Modify the batch process (PB19A227) to evaluate data for all CalSAWS counties as (PB00A227). The batch job is currently configured for a single county code of 19.

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29. Cal-Learn Program: Primary Worker Assigned
    a. Action Information
        i. Name: Cal-Learn Program: Primary Worker Assigned
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CL
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A primary worker has been assigned to an Active Cal-Learn program. Assign a secondary worker if necessary.

    b. Task Information
        i. Task Type: Assign Cal Learn Secondary Worker
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: AFLP worker has been assigned. Assign a Cal-Learn secondary worker.

    c. Modify the batch process (PB19A200) to evaluate data for all CalSAWS counties as (PB00A200). The batch job is currently configured for a single county code of 19.

30. Cal-Learn Program: School Attendance Added
    a. Action Information
        i. Name: Cal-Learn Program: School Attendance Added
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CL
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: School attendance information has been added for a Cal-Learn program. Take appropriate action.

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

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31. Cal-Learn Program: Progress Evaluation Due
    a. Action Information
        i. Name: Cal-Learn Program: Progress Evaluation Due
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CL
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: An incomplete Cal-Learn Progress evaluation is due. Take appropriate action.

    b. Task Information
        i. Task Type: Cal-Learn Incomplete Progress Evaluation
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Incomplete Progress Evaluation Due

    c. Modify the batch process (PB19A229) to evaluate data for all CalSAWS counties as (PB19A229). The batch job is currently configured for a single county code of 19.

32. Cal-Learn Program: Penalty Not Authorized
    a. Action Information
        i. Name: Cal-Learn Program: Penalty Not Authorized
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CL
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A Cal-Learn penalty has not been authorized by the Cal-Learn worker. Take appropriate action.

    b. Task Information
        i. Task Type: Cal-Learn Penalty recommendation not authorized
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Recommended Penalty is not authorized by County Cal-Learn workers

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33. Batch EDBC MC Auto-Rescission failed
    a. Action Information
        i. Name: Batch EDBC MC Auto-Rescission failed
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): MC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: Batch EDBC MC Auto-Rescission failed

    b. Task Information
        i. Task Type: Batch Medical Auto Rescind
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Batch was unable to automatically rescind the Discontinued Medi-Cal Program and reactivate via Batch EDBC for {Benefit Month} for the following reasons: {Skip Reasons}. Review the case and take appropriate action.

34. CalWORKs: Assistance Unit Updated
    a. Action Information
        i. Name: CalWORKs: Assistance Unit Updated
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): RE, WT
        v. Run Date: Monthly(Last day of the month)
        vi. Source: Batch
        vii. Scenario: The CalWORKs Assistance Unit has been updated. Review the Welfare to Work Assistance Unit.

    b. Task Information
        i. Task Type: WTW AU CalWORKs Update
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: The CalWORKs Assistance Unit has been updated. Please evaluate the WTW Assistance Unit for impacts to the WTW Hours Requirement.

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c. Modify the batch process (PB00A136) to evaluate data for all CalSAWS counties. The batch job is currently configured for a single county code of 19.

35. CalWORKs: Child Updated
    a. Action Information
        i. Name: CalWORKs: Child Updated
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): RE, WT
        v. Run Date: Monthly(Last day of the month)
        vi. Source: Batch
        vii. Scenario: A change has occurred to a child on the CalWORKs program. Review the Welfare to Work Assistance Unit.

    b. Task Information
        i. Task Type: WTW AU Child Update
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: A change has occurred to a child on the CalWORKs program. Please evaluate the WTW Assistance Unit for impacts to the WTW Hours Requirement.

36. CalWORKs Recipient: Work Registration Updated
    a. Action Information
        i. Name: CalWORKs Recipient: Work Registration Updated
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): RE, WT
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: The Work Registration has been updated for an Adult on the CalWORKs program. Review the Welfare to Work Assistance Unit.

    b. Task Information
        i. Task Type: WTW AU Work Registration Update
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker

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vii. Long Description: The Work Registration has been updated for an Adult on the CalWORKs program. Please evaluate the WTW Assistance Unit for impacts to the WTW Hours Requirement.

c. Modify the batch process (PB00A137) to evaluate data for all CalSAWS counties. The batch job is currently configured for a single county code of 19.

37. Cal-Learn Program: Sanction Recommended
    a. Action Information
        i. Name: Cal-Learn Program: Sanction Recommended
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): RE, WT
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: Cal-Learn progress indicates a recommendation for Sanction. Take appropriate action.

    b. Task Information
        i. Task Type: Cal Learn Sanction Recommended
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: AFLP worker recommended a Cal-Learn sanction for this participant

    c. Modify the batch process (PB00A137) to evaluate data for all CalSAWS counties. The batch job is currently configured for a single county code of 19.

38. Adoption Assistance Program: Case Created
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

    a. Action Information
        i. Name: Adoption Assistance Program: Case Created
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): AAP
        v. Run Date: Daily(Mon-Fri)
        vi. Source: Batch
        vii. Scenario: An inbound AAP interface resulted in an Adoption Assistance Case being created. Take appropriate action.

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b. Task Information
    i. Task Type: Received DCFS AAP create new case record
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 10 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: An adoption Case has been created.

39. Kin-GAP Program: Added to Foster Care Case
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

    a. Action Information
        i. Name: Kin-GAP Program: Added to Foster Care Case
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): AAP
        v. Run Date: Daily(Mon-Fri)
        vi. Source: Batch
        vii. Scenario: A Kin-GAP program has been created and added to a Foster Care Case. Review and take appropriate action.

    b. Task Information
        i. Task Type: New Kin-GAP Program Added to Foster care case
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 30 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: New Kin-GAP Program Added to Foster care case # {casenumber}

40. Foster Care Program: Child Placement End Dated

    a. Action Information
        i. Name: Foster Care Program: Child Placement End Dated
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): FC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A child placement has been end dated for an Active Foster Care program. Take appropriate action.

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b. Task Information
    i. Task Type: Child Placement End-dated
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 7 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: The Child Placement for this program has been End-dated. Run EDBC to discontinue case or input a new Child Placement record.

41. CalWORKs Program: RE Reminder
    a. Action Information
        i. Name: CalWORKs Program: RE Reminder
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CW
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: An RE Packet is in a Sent or Incomplete status for an Active CalWORKs program. Take appropriate action.

    b. Task Information
        i. Task Type: Contact Participant - CW RE Reminder
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Worker contacting the Participant reminder to complete RE

    c. Modify the batch process (PB19A209) to evaluate data for all CalSAWS counties as (PB00A209). The batch job is currently configured for a single county code of 19.

42. CalFresh/CalWORKs: RE Packet Error
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

    a. Action Information
        i. Name: CalFresh/CalWORKs: RE Packet Error
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): CF, CW
        v. Run Date: Monthly(5th day of the month)
        vi. Source: Batch

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vii. Scenario: A Customer Report is in Error status, manually schedule the RE appointment and generate an RE packet as necessary.

b. Task Information
   i. Task Type: Schedule RE Appointment/Generate RE Packet
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 10 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Manually schedule the redetermination Appointment and/or Mail-out RE packet for the appropriate aid program with an 'Error' status on the Customer Reporting page.

43. CMIPS II: Clearance
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

a. Action Information
   i. Name: CMIPS II: Clearance
   ii. Change Type: Create Task
   iii. Status: Active
   iv. Program(s): IH
   v. Run Date: Daily(Mon-Fri)
   vi. Source: Batch
   vii. Scenario: An IHSS case has been created from a CMIPS II referral. Take appropriate action.

b. Task Information
   i. Task Type: Clearance CMIPSII
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 1 day
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Clearance CMIPSII

44. SAVE Response: Additional Information Required
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

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a. Action Information
    i. Name: SAVE Response: Additional Information Required
    ii. Change Type: Create Task
    iii. Status: Active
    iv. Program(s): CW, CF, CP, RC, MC, FC
    v. Run Date: Daily(Mon-Fri)
    vi. Source: Batch
    vii. Scenario: A SAVE response has been received that requires additional information. Take appropriate action.

b. Task Information
    i. Task Type: SAVE Additional Information Required
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 30 days from Batch date
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Additional Information Required for {CASE_NUMBER} based on the received SAVE abstract with "Institute Additional Information"

45. Batch EDBC MAGI Medi-Cal Skipped: Review Reason
    a. Action Information
        i. Name: Batch EDBC MAGI Medi-Cal Skipped: Review Reason
        ii. Change Type: Create Task
        iii. Status: Active
        iv. Program(s): MC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: EDBC was skipped for MAGI Medi-Cal during Batch processing. Review the skip reason and take appropriate action.

    b. Task Information
        i. Task Type: MAGI Eligibility
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Review data and request MAGI for {effective_month}. MAGI eligibility did not process this program for the following reasons: {skip_reason}.

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c. Update Batch MAGI EDBC processing in the CalSAWS System that triggers the MAGI Eligibility Task code number "BM" to use Category 399 scenario code "C0".

46. Vendor: Validation Error

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

a. Action Information
   i. Name: Vendor: Validation Error
   ii. Change Type: Create Task
   iii. Status: Active
   iv. Program(s): FC
   v. Run Date: Daily(Mon-Fri)
   vi. Source: Batch
   vii. Scenario: A vendor validation record has been received. Review and take appropriate action.

b. Task Information
   i. Task Type: Vendor Validation Record
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 7 Days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: DCFS Worker
   vii. Long Description: {errorMsg}

c. The current assignment logic for this automated Task selects a random active position within the county that is configured to receive DCFS Task Categories. The Default Assignment value of "DCFS Worker" replicates this same assignment processing.

47. Quality Review: Assigned

a. Action Information
   i. Name: Quality Review: Assigned
   ii. Change Type: Create Task
   iii. Status: Active
   iv. Program(s): CC, CW, CF, GA, HO, HT, MC
   v. Run Date: Daily(Mon-Sat)
   vi. Source: Batch
   vii. Scenario: Quality review records have been assigned to the office. Review and take appropriate action.

b. Task Information
   i. Task Type: Quality Assurance Assignment

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ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 5 Days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Quality Assurance Task Worker
vii. Long Description: {Count} amount of Quality Reviews have been selected for your office

c. The current assignment logic for this automated Task selects a random active position within the office that is configured to receive Quality Assurance Assignment Task Categories. The Default Assignment value of "Quality Assurance Task Worker" replicates this same assignment processing.

48. Kin-GAP Program: Placement Back Dated
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

a. Action Information
i. Name: Kin-GAP Program: Placement Back Dated
ii. Change Type: Create Task
iii. Status: Active
iv. Program(s): KG
v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: Kin-GAP child placement information has been received with a begin date in the past. Please take appropriate action.

b. Task Information
i. Task Type: Reapplication for Child Placement
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 10 Days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Child Placement received with begin date of {BEGIN_DATE}. Please review child placement update, reapply and run EDBC.

3 SUPPORTING DOCUMENTS

N/A

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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1629	The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.	- Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county. - Support for mapping CalWIN automated tasks to LRS automated tasks is not included. - Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 – Attachment 1 Contractor Assumptions Inventory List, worksheet 'LRS Automated Tasks'	48 automated Tasks in LRS/CalSAWS are being converted into the Automated Action framework with this enhancement. This is the third phase of DDID 1629.

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5 MIGRATION IMPACTS

N/A

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6 OUTREACH

N/A

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7 APPENDIX

N/A

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214913

DDID 2247

Task Management

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

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1 OVERVIEW

This design outlines modifications to the CalSAWS System to allow configurability for appending information to existing Tasks.

1.1 Current Design

The CalSAWS System allows counties to create and manage custom Task Types and Sub-Types. The Task Type Detail page and Task Sub-Type Detail pages are used to manage the types and their associated attributes. The Task creation process does not include functionality to append to existing Tasks. DDID 2247 requires functionality allowing users to specify which Task Types can be appended to in lieu of creating a new Task.

1.2 Requests

Modify the CalSAWS Task Management processing to allow authorized users to specify which types of Tasks can append to existing assigned Tasks before creating a new Task. The user must be able to specify which types of Tasks the new Task can be appended to.

1.3 Overview of Recommendations

1. Add an Append Information section to the Task Type Detail page that will allow users to specify which Tasks can be appended to for the Task Type.
2. Add an Append Information section to the Task Sub-Type Detail page that will allow users to specify which Tasks can be appended to for the Task Type/Sub-Type.
3. Modify the CalSAWS Task creation logic to evaluate Append Information to determine if a new Task will be created or if an existing Task will be appended to.

1.4 Assumptions

1. The portion of the DDID 2247 requirement that alerts the assigned worker when a Task is appended to will be handled with DDID 2249 in a later release.
2. The action of appending information to the Long Description of an existing Task will log the appropriate Task History entry which contains details such as when the append action occurred and by whom.

2 RECOMMENDATIONS

This section will outline recommendations to introduce Task Management functionality that allows authorized users to specify which types of Tasks can append to existing Tasks instead of creating a new Task.

2.1 Task Type Detail Page

2.1.1 Overview

The Task Type Detail page is accessible from the Task Type List page. This page captures and displays detailed information for a Task Type. This section outlines modifications to the page to include append information. This section of the page will be evaluated at the time of Task creation to determine if an existing Task can be appended to.

2.1.2 Task Type Detail Page Mockups

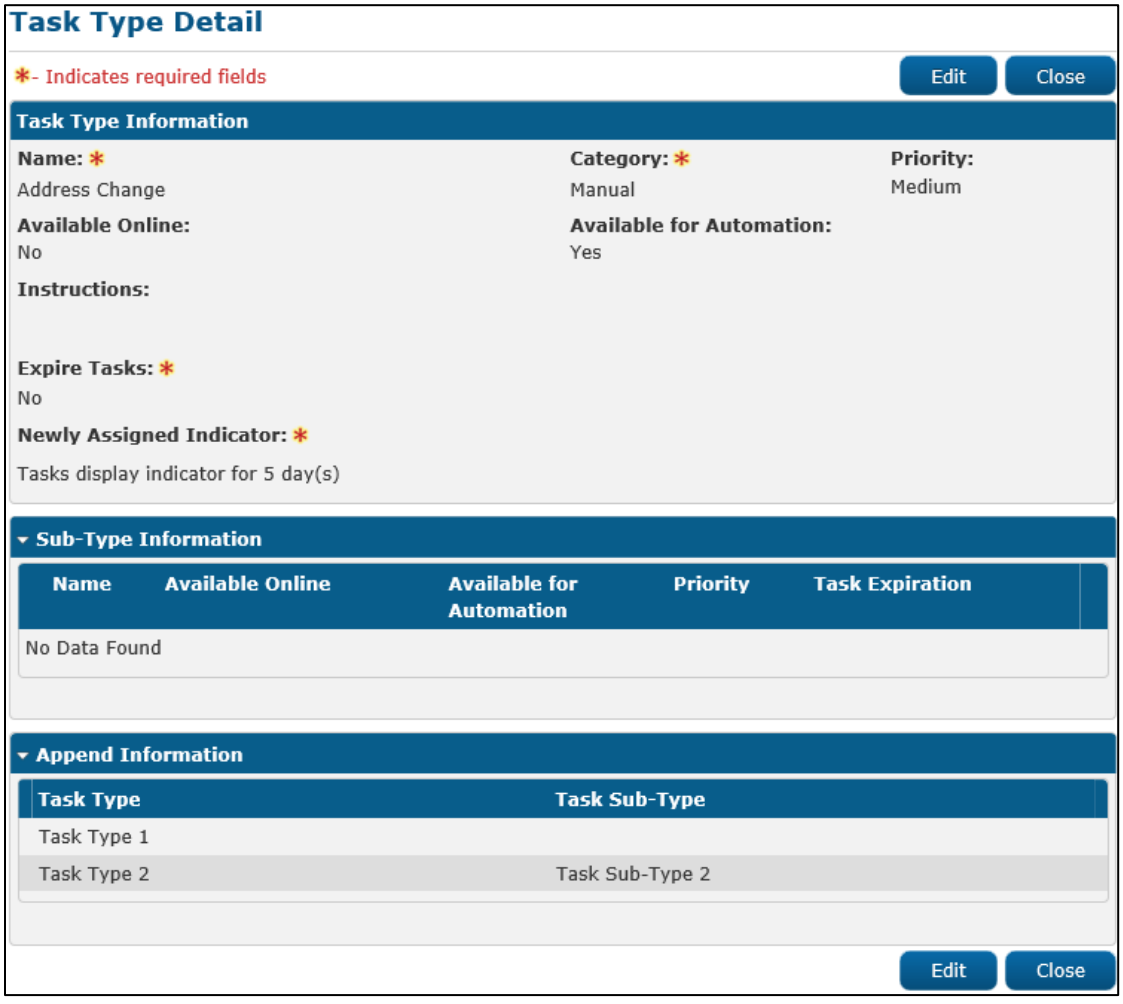


Figure 2.1.2.1 – Task Type Detail Page Mockup – View Mode

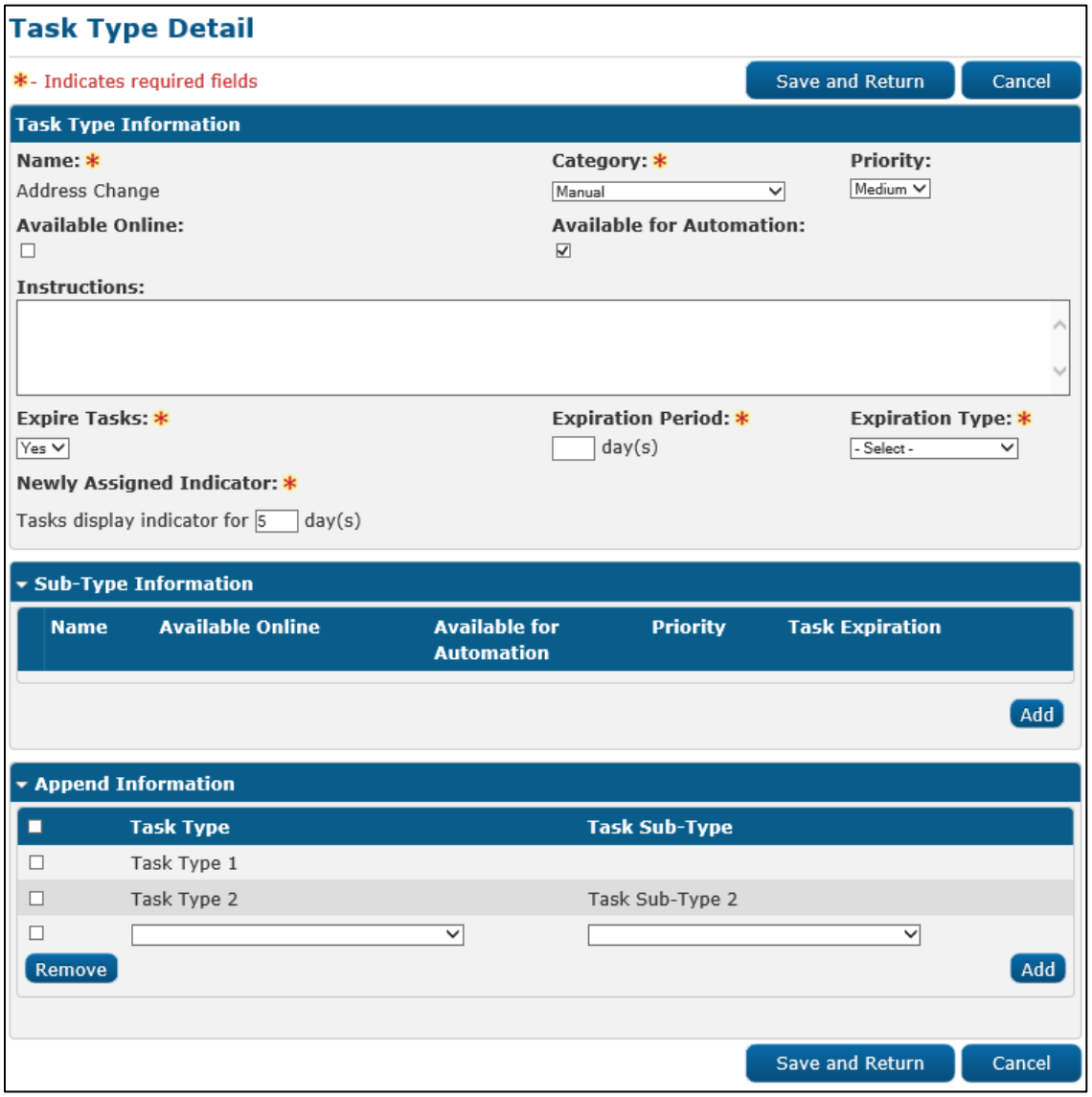


Figure 2.1.2.2 – Task Type Detail Page Mockup – Create/Edit Mode

2.1.3 Description of Changes

Update the Task Type Detail page to support configurations for appending to existing Tasks by introducing a collapsible Append Information panel.

1. Add an Append Information panel to the Task Type Detail page. The panel will be collapsed on initial load of the page if there is no Append Information available, otherwise the panel will load expanded.
    a. Selectable Checkbox -- For each result displayed, a selectable checkbox will display at the beginning of the row when the

page is in create or edit mode. This checkbox can be used to select one or more rows within the panel to be removed via the "Remove" button.

b. Task Type – The Task Type for the row. When the page is in create or edit mode, this field will display as a dropdown with a maximum width of 50 characters that includes an alphabetical list of Task Types available to the county. When the page is in view mode, this field will display the Task Type as plain text for each row.
c. Task Sub-Type – An optional field that allows the User to indicate a Task Sub-Type for an Append rule. When the page is in create or edit mode, this field will display as a dropdown with a maximum width of 50 characters if the selected Task Type value includes one or more Sub-Types. This field will display an alphabetical list of Task Sub-Types associated to the selected Task Type. If the selected Task Type does not include any Sub-Types, this field will not display. When the page is in view mode, this field will display the Task Sub-Type as plain text for each row. If the row does not have a selected Task Sub-Type, this field will be blank.
d. **BUTTON:** Remove -- This button displays when the page is in create or edit mode and there exists at least one row in the Append Information panel. This button will remove any rows within the panel that have a checkmark selected in the selectable checkbox.
e. **BUTTON:** Add -- This button displays when the page is in create or edit mode. This button adds an additional row to the end of the Append Information panel and displays the Task Type dropdown for the new row allowing the User to add a new Append rule to the panel.

2. If a User creates duplicate rows within the Append Information Panel, the duplicate rows will be consolidated into a single distinct row when the "Save and Return" button is used to save the page. If a User clicks the "Add" button in the Append Information section to add a new row, does not complete the row by selecting a Task Type and clicks the "Save and Return" button on the page, a new Append Information row will not be saved.

2.1.4 Page Validation

1. Append Information Add - A new row may not be added until the last row has been completed.
    a. A validation message displays when the User attempts to add a row in the Append Information table before completing the last row on that table.

2.1.5 Page Location

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

2.1.6 Security Updates

N/A – There are no modifications to existing security for the Task Type Detail page.

2.1.7 Page Mapping

Update page mapping for the Task Type Detail page.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.2 Task Sub-Type Detail Page

2.2.1 Overview

The Task Sub-Type Detail page is accessible from the Sub-Type Information section of the Task Type Detail page. This page captures and displays information for a Task Sub-Type. This section outlines modifications to the page to include append information. This section of the page will be evaluated at the time of Task creation to determine if an existing Task can be appended to.

2.2.2 Task Sub-Type Detail Mockups

Figure 2.2.2.1 – Task Sub-Type Detail Mockup – View Mode

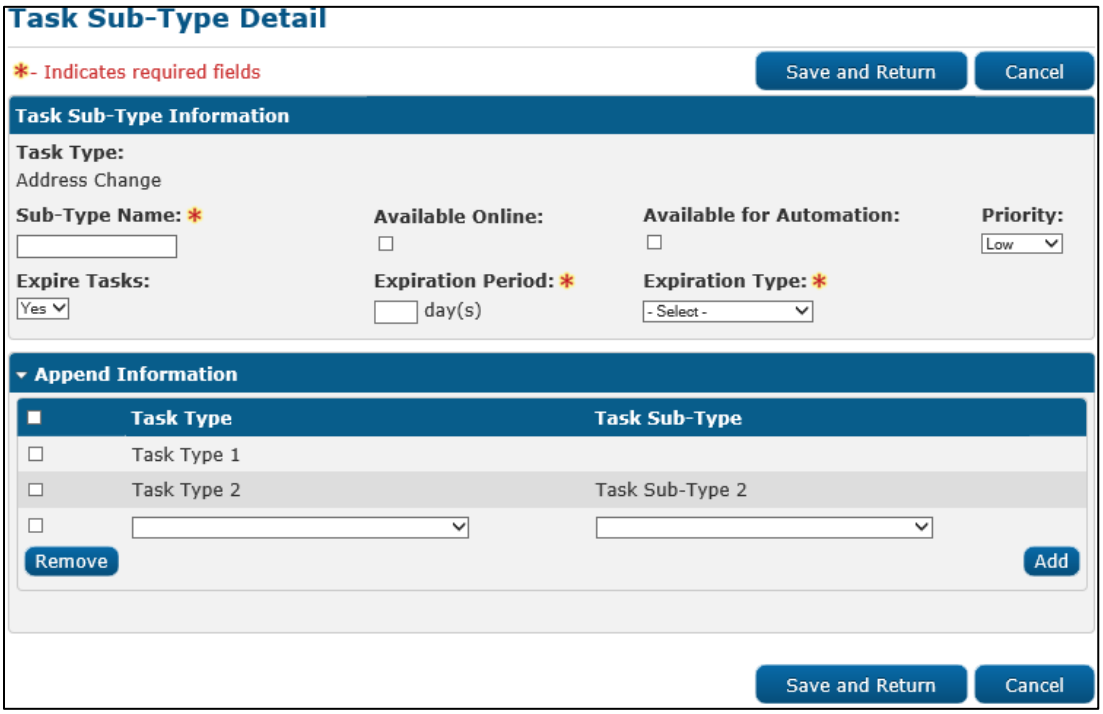


Figure 2.2.2.2 – Task Sub-Type Detail Mockup – Create/Edit Mode

2.2.3 Description of Changes

Update the Task Sub-Type Detail page to support configurations for appending to existing Tasks by introducing a collapsible Append Information panel.

1. Add an Append Information panel to the Task Sub-Type Detail page. The panel will be collapsed on initial load of the page if there is no Append Information available, otherwise the panel will load expanded.
    a. Selectable Checkbox -- For each result displayed, a selectable checkbox will display at the beginning of the row when the page is in create or edit mode. This checkbox can be used to select one or more rows within the panel to be removed via the "Remove" button.
    b. Task Type – The Task Type for the row. When the page is in create or edit mode, this field will display as a dropdown with a maximum width of 50 characters that includes an alphabetical list of Task Types available to the county. When the page is in view mode, this field will display the Task Type as plain text for each row.
    c. Task Sub-Type – An optional field that allows the User to indicate a Task Sub-Type for an Append rule. When the page is in create or edit mode, this field will display as a dropdown with a maximum width of 50 characters if the selected Task Type value includes one or more Sub-Types. This field will display an alphabetical list of Task Sub-Types associated to the selected Task Type. If the selected Task Type does not include any Sub-Types, this field will not display. When the page is in view mode, this field will display the Task Sub-Type as plain text for each row. If the row does not have a selected Task Sub-Type, this field will be blank.
    d. **BUTTON:** Remove -- This button displays when the page is in create or edit mode and there exists at least one row in the Append Information panel. This button will remove any rows within the panel that have a checkmark selected in the selectable checkbox.
    e. **BUTTON:** Add -- This button displays when the page is in create or edit mode. This button adds an additional row to the end of the Append Information panel and displays the Task Type dropdown for the new row allowing the User to add a new Append rule to the panel.
2. If a User creates duplicate rows within the Append Information Panel, the duplicate rows will be consolidated into a single distinct row when the "Save and Return" button is used to save the page. If a User clicks the "Add" button in the Append Information section to add a new row, does not complete the row by selecting a Task Type and clicks

the "Save and Return" button on the page, a new Append Information row will not be saved.

2.2.4 Page Validation

1. Append Information Add - A new row may not be added until the last row has been completed.
    a. A validation message displays when the User attempts to add a row in the Append Information table before completing the last row on that table.

2.2.5 Page Location

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

2.2.6 Security Updates

N/A – There are no modifications to existing security for the Task Sub-Type Detail page.

2.2.7 Page Mapping

Update page mapping for the Task Sub-Type Detail page.

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Append Processing

2.3.1 Overview

The automated Task creation processing within the CalSAWS System requires modifications to evaluate for any append instructions at the time of Task creation. This section outlines the append processing specifics.

2.3.2 Description of Changes

1. Implement processing to evaluate and action Task append instructions at the time of automated Task creation. Manual Task creation by workers will not pass through the append processing. Task append processing is as follows:

a. **Retrieve Append Information**: For the Task to be created, evaluate the Task Type and Sub-Type pages for the Task Type and Sub-Type of the requested Task to confirm if any Append Information has been configured. The Append Information panel allows the user to specify one or more Task Type/Sub-Types of Tasks to be appended to.
    i. If the Task to be created has a Task Type and does not have a Sub-Type, the Append Information on the Task Type Detail page (Section 2.1) will be evaluated.

    ii. If the Task to be created has a Task Type and a Sub-Type, the Append Information on the Task Sub-Type Detail page (Section 2.2) for the appropriate Sub-Type will be evaluated.

b. **Action Append Information:** Based on the contents of the Append Information panel, take the appropriate action to create a new Task or append to an existing Task as follows:
    i. Create New Task: If the Append Information panel for the Task to be created is empty, the processing will proceed to create the new Task because there are no append instructions that have been configured for the Task to be created.

    ii. Append Processing: If the Append Information panel for the Task to be created contains Task Type and Task Sub-Type information, retrieve Tasks in an Assigned status that are associated to the Case of the Task to be created. The retrieved Tasks must have a Task Type and Sub-Type that matches one of the rows in the appropriate Append Information panel per Recommendation 2.3.2.1.a.

        1. ***0 Matching Tasks***: If there are no Tasks associated to the Case of the Task to be created that match Append Information, proceed to create the new Task. In this instance, a user has defined Append instructions, but there are no Assigned Tasks for the Case that meet the conditions, so the new Task will be created.
        2. ***1 or More Matching Tasks***: If there are one or more Tasks associated to the Case of the Task to be created that match the Append Information, Append the appropriate information to each Task. A new Task will not be created.

        Once the above steps have retrieved Task(s) to be appended to, the following verbiage will be appended

to the end of the Long Description attribute of the existing Task(s):

"
Append: {Additional Long Description}"

Attribute	Value
{Additional Long Description}	Populates with the Long Description text of the Task that would have been created as new.

Image Association: If an append action is resulting from an imaged document that passed through the Document Routing Rule page (See DDID 2254/CA-214917), in addition to the Long Description being appended to, the image(s) will also be appended to the Task.

Record History: Append actions will log the appropriate Task History transaction which can be viewed on the Task Detail page. This section of the page can be referenced to see the previous value/new value for the Long Description, the date and time of the append action and who/what triggered the append.

Long Description Limit: Task Long Descriptions have a limit of 2,000 characters. Although the following scenario is expected to be rare, if an append action causes the Task Long Description to reach the 2,000 character limit or the Long Description is already 2,000 characters, the appropriate number of characters will be removed from the end of the Long Description to make space for the new verbiage that will be appended. The new Long Description verbiage will then be appended to the Long Description and the Task History transaction will be recorded. The Task History section of the Task Detail page will display the details of this action happening and the value of the Long Description prior to this append action.

Technical: Specific information pertaining to an append action will be logged into the database. This approach will not be limited to append functionality specifically should a similar logging feature be required in future enhancements to Task Management functionality. For

example, possible attributes which may be stored for an append action are date, time, the Task Type and Sub-Type append rule that triggered the append action and whether or not a Long Description truncate was required (See "Long Description Limit" section directly above).

Append Processing Flow

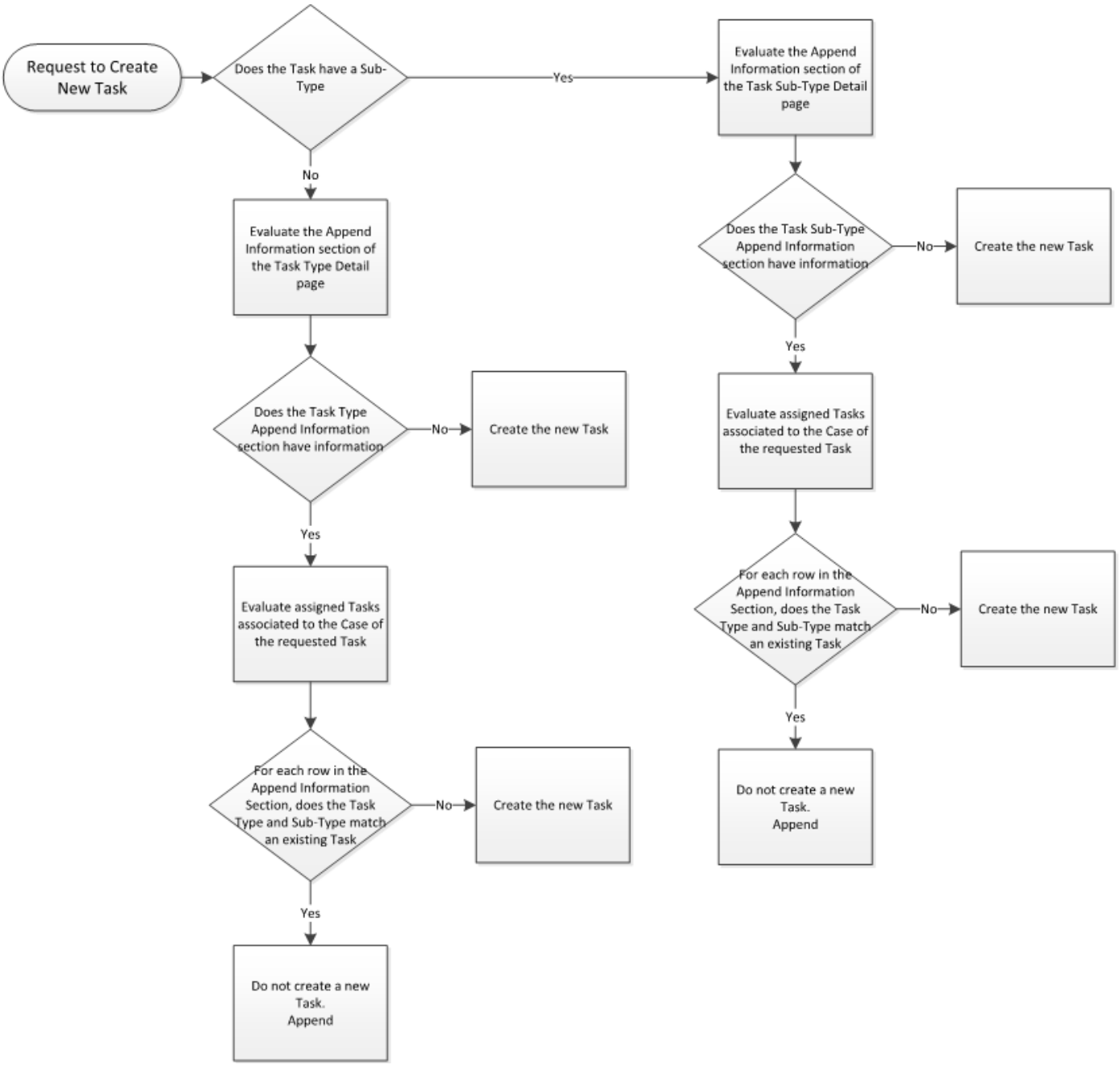


Figure 2.3.2.1 – Append Processing Flow

2.4 Example Scenarios

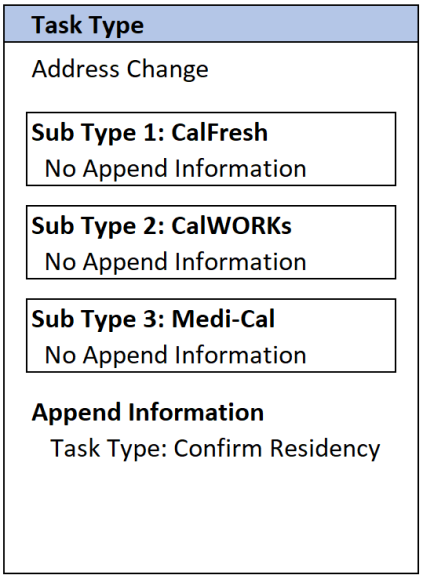
The following example scenarios illustrate the Task append processing.

Each of the following 7 scenarios assumes that Case 123 within the county has the following Tasks associated in an Assigned status:

#	Task Type	Task Sub-Type(s)
1	Review Contact Information	None
2	Confirm Residency	None
3	Confirm Residency	CalFresh
4	Confirm Residency	Medi-Cal

Figure 2.4.1– Case 123 Existing Tasks

Each of the following examples includes an image like:



This image is intended to illustrate a Task Type with 3 Sub Types. In this example, Address Change is the Task Type and the 3 Sub-Types are CalFresh, CalWORKs and Medi-Cal. The main Task Type Detail page has one row in the Append Information panel and each of the 3 Sub-Type Detail pages has an empty Append Information panel.

2.4.1 Scenario 1

In this scenario, the Task Type Detail page is configured to have a single append instruction at the Task Type level. There are no append instructions for any of the 3 specific Task Sub-Types on the Sub-Type Detail page.

Task Type

Address Change

Sub Type 1: CalFresh
No Append Information

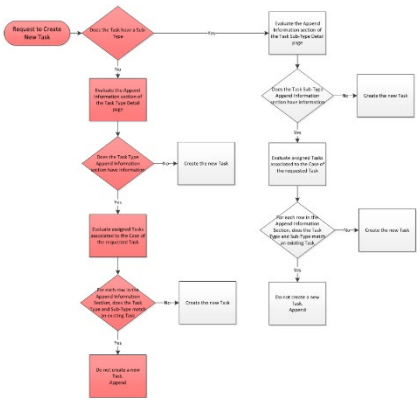
Sub Type 2: CalWORKs
No Append Information

Sub Type 3: Medi-Cal
No Append Information

Append Information
Task Type: Confirm Residency

New Tasks being created for Case 123:

#	Task Type	Task Sub-Type(s)
1	Address Change	None
2	Address Change	CalWORKs

Task #	Result of Task Creation	
1	This Task will not be created as a new Task because the Address Change Task Type specifies to append to an existing Confirm Residency Task if one exists for the Case. The existing Confirm Residency Task (Task #2 per Figure 2.4.1) will be appended to.	 **See Appendix – 7.1**
2	This Task will be created as a new Task because there are no append rules specified for Task Type: Address Change with Sub-Type: CalWORKs.	**See Appendix – 7.2**

2.4.2 Scenario 2

In this scenario, the Task Type Detail page is configured to have two append instructions at the Task Type level. The CalWORKs Sub-Type Detail page is configured with 1 append instruction. This scenario describes what Tasks to append to when multiple Tasks exist based on the append instructions and when there are append instructions, but no matching Tasks on the Case.

Task Type
Address Change

Sub Type 1: CalFresh
No Append Rules

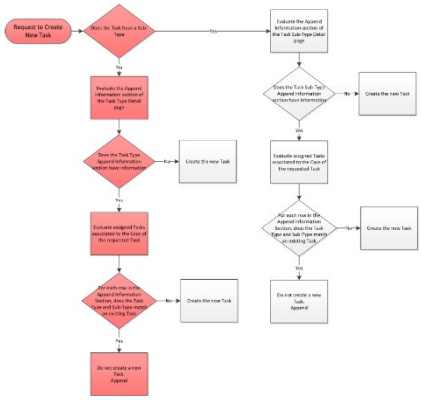
Sub Type 2: CalWORKs
Append Information
1: Task Type: Contact Client
Sub-Type: None

Sub Type 3: Medi-Cal
No Append Rules

Append Information
1: Task Type: Confirm Residency
Sub-Type: None
2: Task Type: Review Contact Information
Sub-Type: None

New Tasks being created for Case 123:

#	Task Type	Task Sub-Type(s)
1	Address Change	None
2	Address Change	CalWORKs

Task #	Result of Task Creation	
1	This Task will not be created as a new Task because the Address Change Task Type specifies to append to a Confirm Residency or Review Contact Information Task if one exists for the case. Both of these Tasks exist for Case 123, so both Tasks (#1 and #2 per Figure 2.4.1) will be appended to.	 **See Appendix – 7.1**
2	This Task will be created as a new Task because, even though there are append instructions on the CalWORKs Sub-Type Detail page for Task Type of Address Change, Case 123 does not have a Contact Client Task to append to.	**See Appendix – 7.3**

2.4.3 Scenario 3

In this scenario, the Task Type Detail page is configured to have one append instruction at the Task Type level. Both the CalFresh and CalWORKs Sub-Types are configured to have an append instruction on the Sub-Type Detail page as well.

Task Type
Address Change

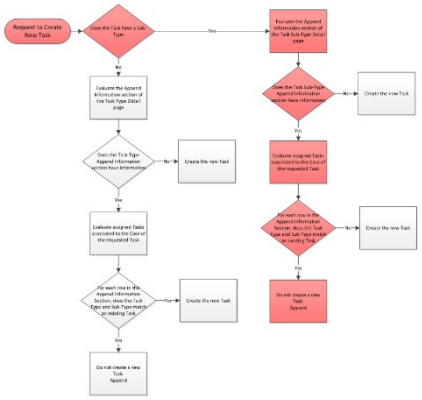
Sub Type 1: CalFresh
Append Information
1: Task Type: Review Contact Information
Sub-Type: None

Sub Type 2: CalWORKs
Append Information
1: Task Type: Review Contact Information
Sub-Type: None

Sub Type 3: Medi-Cal
No Append Rules

Append Information
1: Task Type: Confirm Residency
Sub-Type: None

#	Task Type	Task Sub-Type(s)
1	Address Change	CalWORKs

Task #	Result of Task Creation	
1	This Task will not be created as a new Task because the Address Change Task Type with Sub-Type CalWORKs specifies to append to a Review Contact Information Task if one exists for the case. The existing Review Contact Information Task (Task #1 per Figure 2.4.1) will be appended to.	 **See Appendix – 7.4**

2.4.4 Scenario 4

In this scenario, the Task Type Detail page is configured to have one append instruction at the Task Type level. The CalFresh Sub-Type has a single append instruction, the CalWORKs Sub-Type has 2 append instructions and the Medi-Cal Sub-Type does not have any append instructions on the Sub-Type Detail page.

Task Type
Address Change

Sub Type 1: CalFresh
Append Information
1: Task Type: Review Contact Information
Sub-Type: None

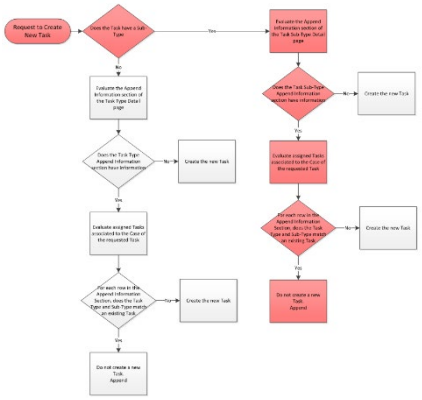
Sub Type 2: CalWORKs
Append Information
1: Task Type: Review Contact Information
Sub-Type: None
2: Task Type: Confirm Residency
Sub-Type: None

Sub Type 3: Medi-Cal
No Append Rules

Append Information
1: Task Type: Confirm Residency
Sub-Type: None

New Task being created for Case 123:

#	Task Type	Task Sub-Type(s)
1	Address Change	CalWORKs

Task #	Result of Task Creation	
1	This Task will not be created as a new Task because the Address Change Task Type and CalWORKs Sub-Type specify to append to a Review Contact Information and Confirm Residency Task if one exists for the case. Both Tasks exist for Case 123, so both Tasks (#1 and #2 per Figure 2.4.1) will be appended to.	 **See Appendix – 7.4**

2.4.5 Scenario 5

In this scenario, the Task Type Detail page is configured to have one append instruction at the Task Type level, but Case 123 does not have a Task meeting the criteria to append to.

Task Type
Address Change

Sub Type 1: CalFresh
No Append Information

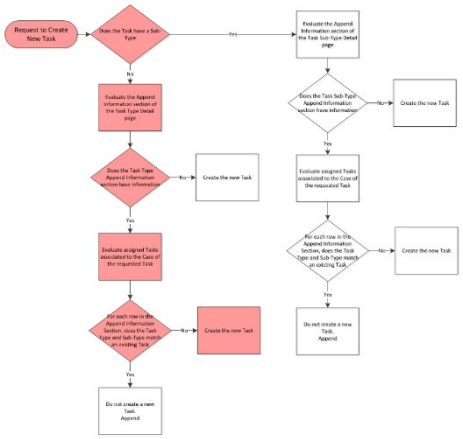
Sub Type 2: CalWORKs
No Append Information

Sub Type 3: Medi-Cal
No Append Information

Append Information
Task Type: Contact Client
Sub-Type: None

New Task being created for Case 123:

#	Task Type	Task Sub-Type(s)
1	Address Change	None

Task #	Result of Task Creation	
1	This Task will be created as a new Task because, even though there are append instructions on the Address Change Task Type Detail page, Case 123 does not have a Contact Client Task to append to.	 **See Appendix – 7.5**

2.4.6 Scenario 6

In this scenario, the Task Type Detail page does not have any append instructions at the Task Type level. The CalFresh and CalWORKs Sub-Types each have a single append instruction and the Medi-Cal Sub-Type does not have any append instructions on the Sub-Type Detail page.

Task Type
Address Change

Sub Type 1: CalFresh
Append Information
1: Task Type: Review Contact Information
Sub-Type: None

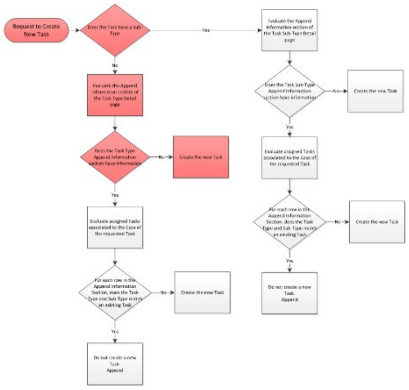
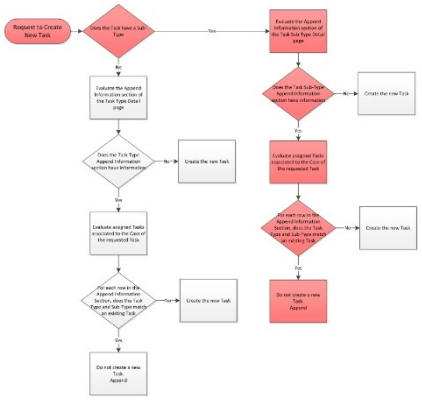
Sub Type 2: CalWORKs
Append Information
1: Task Type: Confirm Residency
Sub-Type: CalFresh

Sub Type 3: Medi-Cal
Append Information
No Append Rules

Append Information
No Append Rules

New Tasks being created for Case 123:

#	Task Type	Task Sub-Type(s)
1	Address Change	None
2	Address Change	CalWORKs

Task #	Result of Task Creation	
1	This Task will be created as a new Task because there are no append rules specified for Task Type: Address Change with Sub-Type: None.	 **See Appendix – 7.6**
2	This Task will not be created as a new Task because the Address Change Task Type and CalWORKs Sub-Type specify to append to a Task of Type Confirm Residency with a Sub-Type of CalFresh. The existing Confirm Residency/CalFresh Task (Task #3 per Figure 2.4.1) will be appended to.	 **See Appendix – 7.4**

2.4.7 Scenario 7

In this scenario, the Task Type Detail page does not have any append instructions at the Task Type level or any of the Sub-Type levels.

Task Type
Address Change

Sub Type 1: CalFresh
No Append Rules

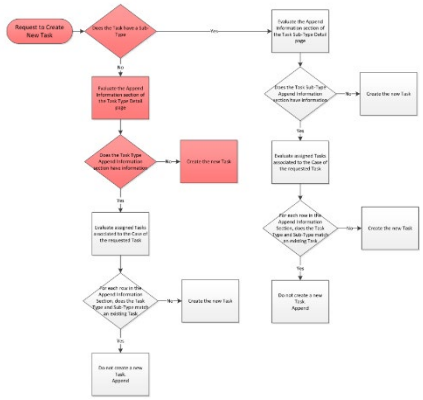
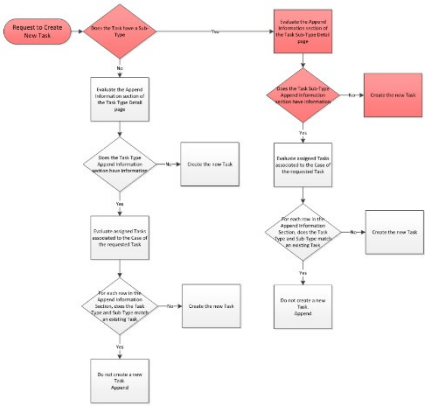
Sub Type 2: CalWORKs
No Append Rules

Sub Type 3: Medi-Cal
No Append Rules

Append Information
No Append Rules

New Tasks being created for Case 123:

#	Task Type	Task Sub-Type(s)
1	Address Change	None
2	Address Change	CalWORKs

Task #	Result of Task Creation	
1	This Task will be created as a new Task because there are no append rules specified for Task Type: Address Change with Sub-Type: None.	 **See Appendix – 7.6**
2	This Task will be created as a new Task because there are no append rules specified for Task Type: Address Change with Sub-Type: CalWORKs.	 **See Appendix – 7.2**

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2247	The CONTRACTOR shall update the Task Management solution to allow authorized users to specify which types of tasks should append to existing/open tasks before creating a new task. The user must be able to specify which types of tasks the new task can be appended to. The assigned worker must be alerted when their task is updated with additional documents.	Implementation of this DDID will leverage display built in DDID 2249 as a mechanism to alert a worker their task has been updated.	This enhancement introduces functionality to append to existing Tasks instead of creating a new Task. The alert function will be implemented later as DDID 2249 is targeted for implementation in late 2021.

5 MIGRATION IMPACTS

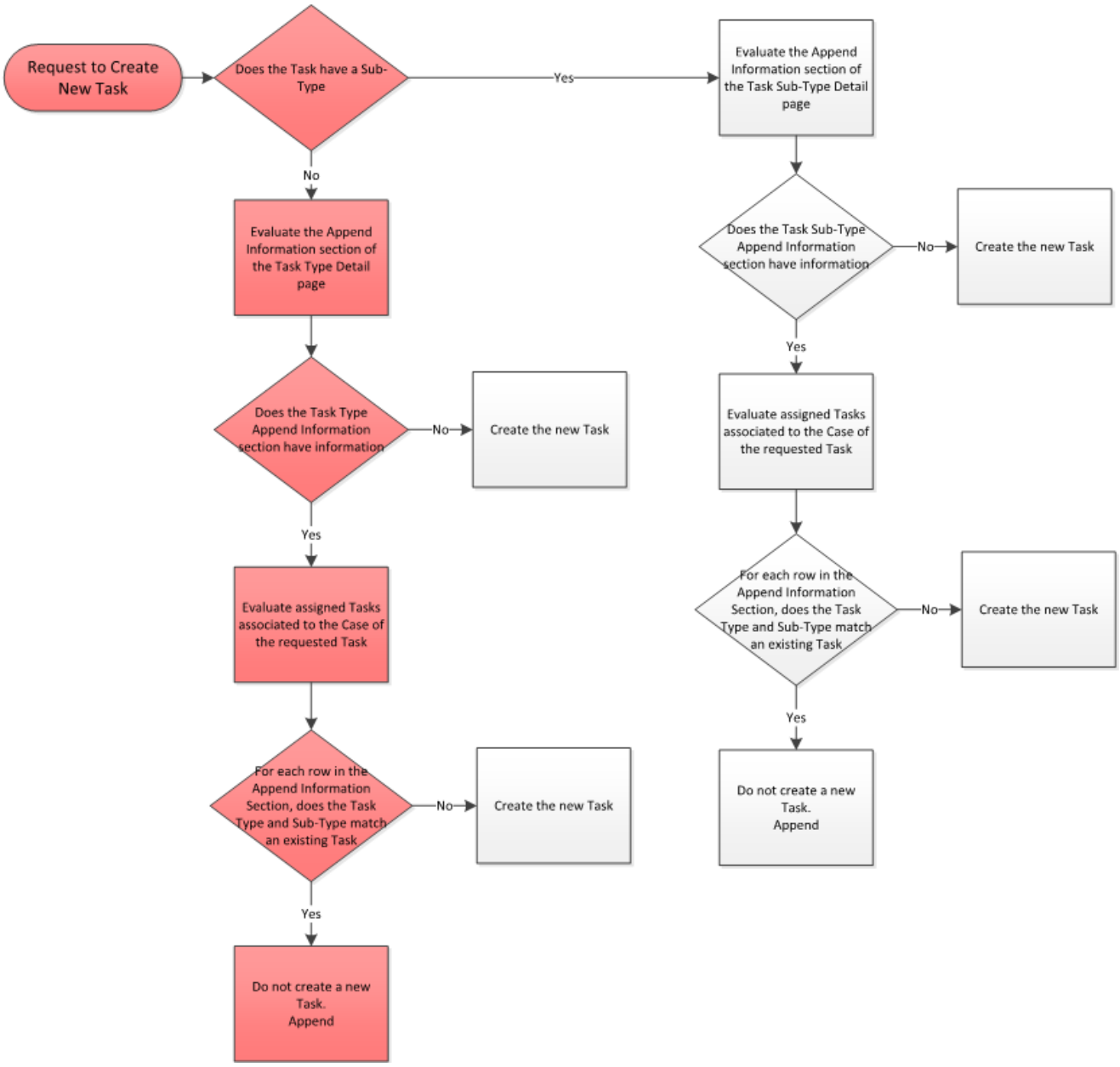
N/A

6 OUTREACH

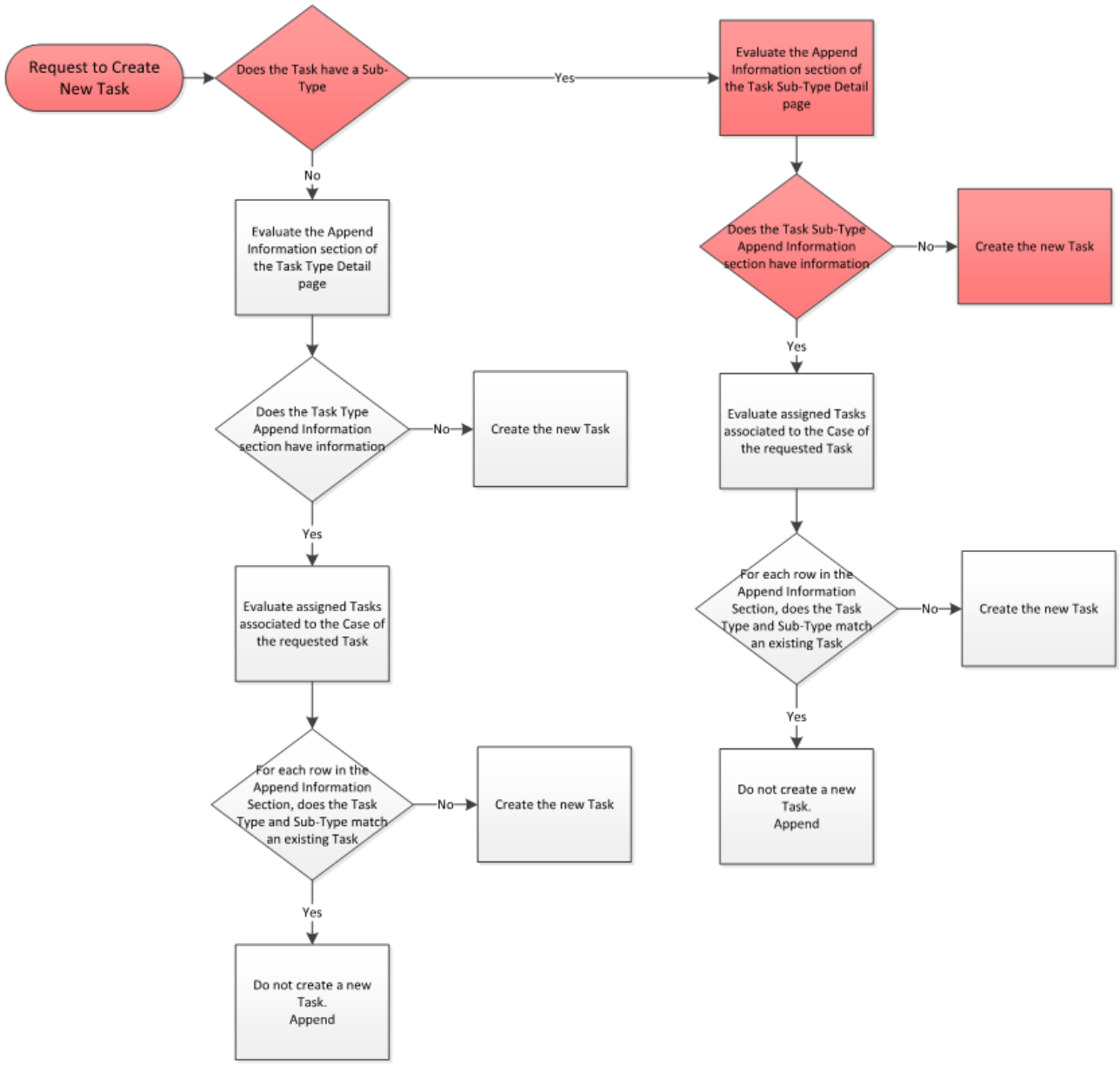
N/A

7 APPENDIX

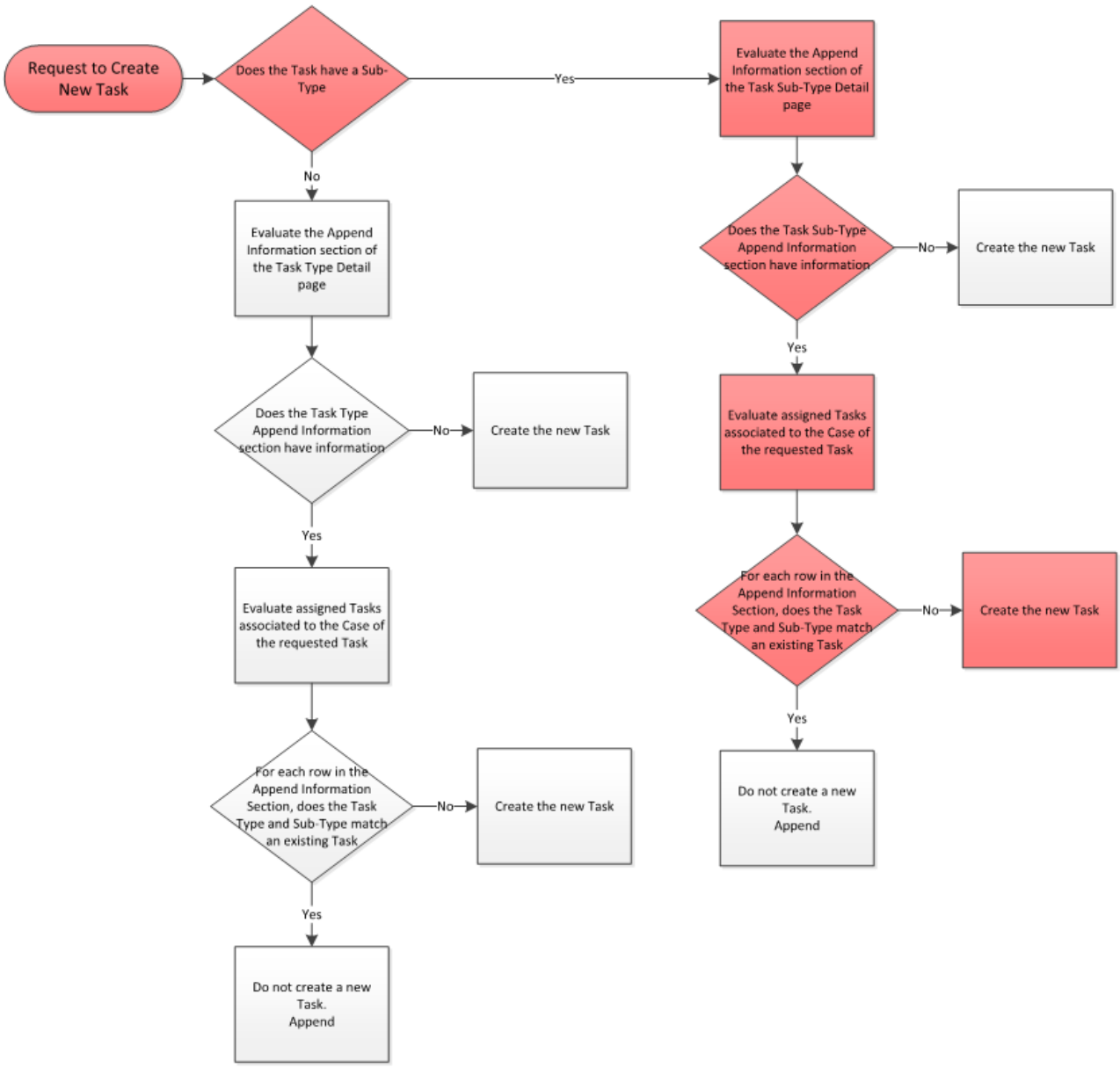
7.1 Task Scenario Result #1



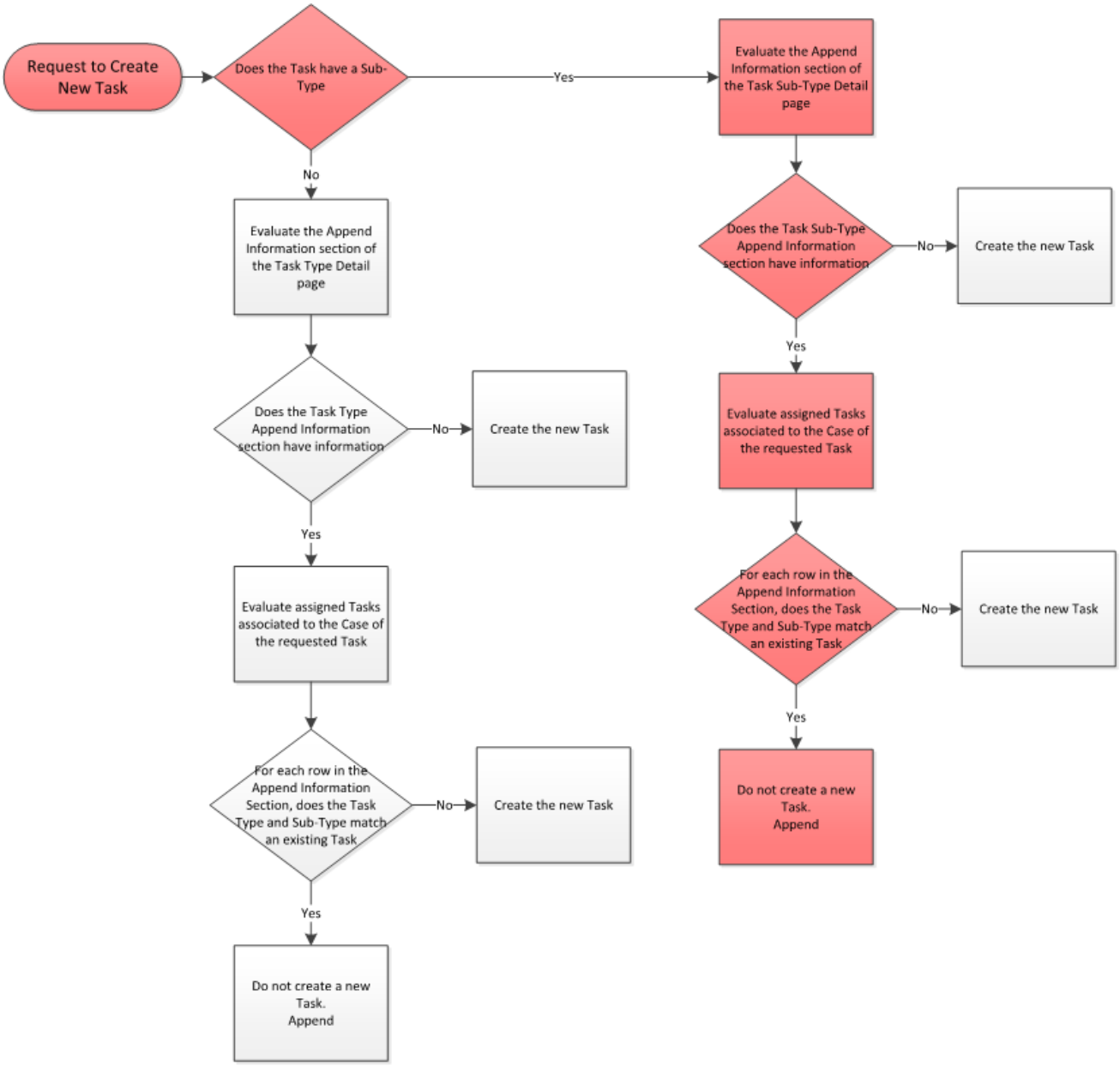
7.2 Task Scenario Result #2



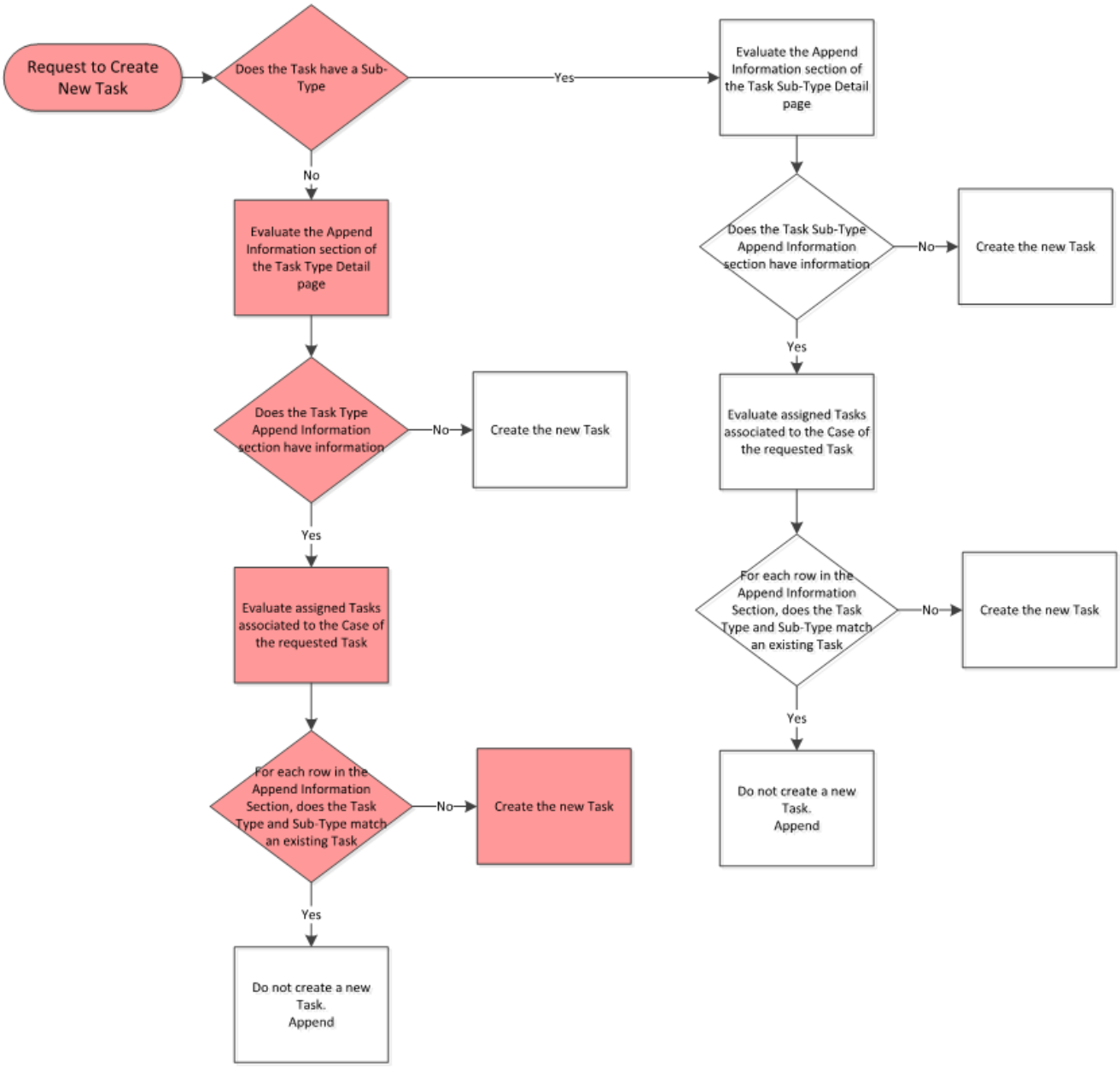
7.3 Task Scenario Result #3



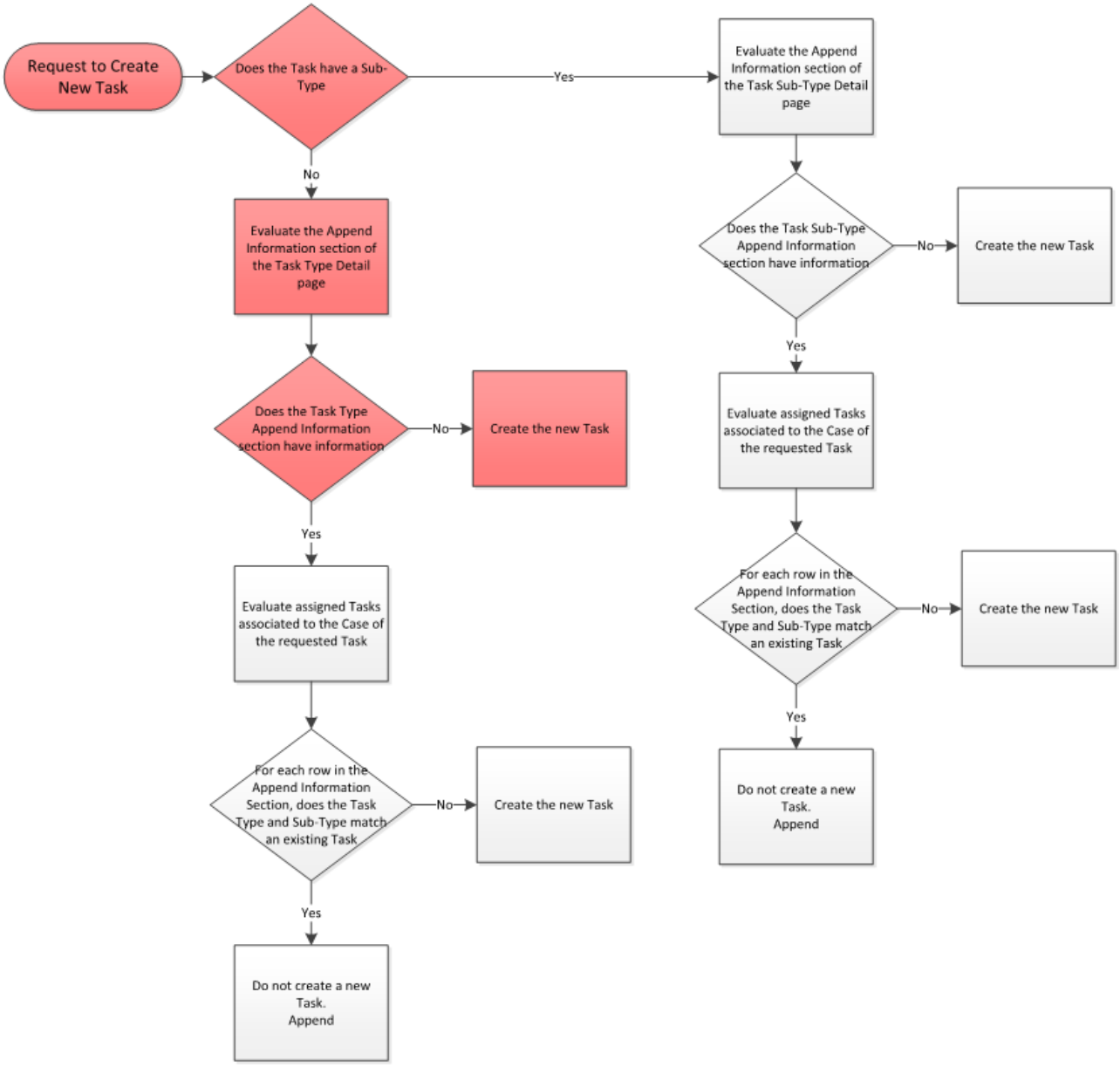
7.4 Task Scenario Result #4



7.5 Task Scenario Result #5



7.6 Task Scenario Result #6



CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215174 | DDID 2672 FDS

Non State Forms - Migrate NA RE Y (09/2020)

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Raj Devidi
	Reviewed By	Sureshnaidu Mullaguri

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/22/2020	1.0	Initial Revision	Raj Devidi
11/10/2020	1.1	Updated as per DEL comments	Raj Devidi
11/16/2020	1.2	Updated to include diaper allowance text	Raj Devidi

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1 OVERVIEW

The purpose of this change is to add the NA RE Y (09/2020) Form to LRS/CalSAWS and generate this form from the Template Repository and Customer Reporting page.

1.1 Current Design

The NA RE Y (09/2020) - Notice of Action - Stop Aid; RD / RC Form Incomplete form does not exist in LRS/CalSAWS.

1.2 Requests

This form will be available in all threshold languages including English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese languages.

1. Migrate NA RE Y (09/2020) - RE/RC Form Incomplete including popup from the Customer Reporting page to the CalSAWS Software.
2. Per State review, update NA RE Y (09/2020).
3. This form will be available in the Template Repository.

1.3 Overview of Recommendations

Add NA RE Y (09/2020) form to LRS/CalSAWS Template Repository in English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese languages. Migrate Customer Reporting page popup functionality for NA RE Y (09/2020) form from C-IV.

1.4 Assumptions

1. Page numbers will be added on the form.
2. NA RE Y (09/2020) form will be available for all 58 counties.
3. The NA RE Y (09/2020) serves as a reminder, it does not replace the M40-181A CalWORKs discontinuance NOA.
4. The NA RE Y will not replace the CW 2200 for missing verifications.
5. All form fields are editable unless specified.

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2 RECOMMENDATIONS

2.1 Migrate the NA RE Y (09/2020)- Notice of Action - Stop Aid; RD / RC Form Incomplete from CIV to LRS/CalSAWS

2.1.1 Overview

English and Spanish version of Form NA RE Y (09/2020) is available in C-IV. Update and migrate the NA RE Y (09/2020) form to LRS/CalSAWS.

Form: NA RE Y (09/2020)
Programs: CalWORKs
Attached Forms: N/A
Forms Category: NOA
Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

2.1.2 Description of Change

1. Add NA RE Y (09/2020) form in English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese languages to the LRS/CalSAWS Software.

   Form Header: LRS/CalSAWS State Standard Header
   Form Title/Name: Notice of Action - Stop Aid; RD / RC Form Incomplete
   Form Description: Notice to Customers that their CW program will be stopped because the Redetermination Packet is incomplete.
   Form Number: NA RE Y
   Include NA Back 9: Yes
   Form Mockups: Please refer to Section 3.0 – Supporting Document #1.

2. Add the NA RE Y (09/2020) form to Template Repository. The following parameters will be required:

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

3. Populate fields as below when NA RE Y (09/2020) form is generated from Template Repository.

   a. Header fields population

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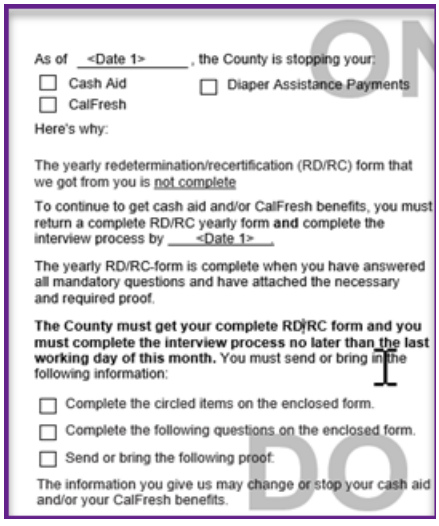
Field	Description
Section: Header (CalSAWS Standard Header), Page 1	
Worker Name	Name of Worker who is assigned to the Program
Worker ID	ID of Worker who is assigned to the Program
Worker Phone Number	Phone Number of Worker who is assigned to the Program
Case Name	Case Name on the Case
Date	Date on which NA RE Y (09/2020) form generated
Customer ID	Customer Id of the Participant
Case Number	Case Number on the Case

b. Form fields population


As of <Date 1>, the County is stopping your:

☐ Cash Aid ☐ Diaper Assistance Payments

☐ CalFresh

Here's why:

The yearly redetermination/recertification (RD/RC) form that we got from you is not complete

To continue to get cash aid and/or CalFresh benefits, you must return a complete RD/RC yearly form **and** complete the interview process by <Date 1>.

The yearly RD/RC-form is complete when you have answered all mandatory questions and have attached the necessary and required proof.

The County must get your complete RD/RC form and you must complete the interview process no later than the last working day of this month. You must send or bring in the following information:

☐ Complete the circled items on the enclosed form.

☐ Complete the following questions on the enclosed form.

☐ Send or bring the following proof:

The information you give us may change or stop your cash aid and/or your CalFresh benefits.

Field Name	Type	Value
Date 1	Date	MM/DD/YYYY Current month end date when generating from Template Repository.

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Cash Aid	Check Box	Check if user selects CalWORKs in Template Repository.
Diaper Assistance Payments	Check Box	If there is a diaper allowance assistance Customer Need for case, Check Diaper Assistance Payments check box.
CalFresh	Check Box	Blank and Editable.
Complete the circled items on the enclosed form check box	Check Box	Blank and Editable.
Complete the following questions on the enclosed form check box	Check Box	Blank and Editable.
Send or bring the following proof check box	Check Box	Blank and Editable.

4. Footer requirements
   English: NA RE Y (09/2020) STOP AID; RD/RC FORM INCOMPLETE
   All other languages: NA RE Y (09/2020) <LanguageName> - STOP AID; RD/RC FORM INCOMPLETE
   Ex: NA RE Y (09/2020) Spanish - STOP AID; RD/RC FORM INCOMPLETE

5. Agency name requirements

6. Diaper Allowance text

   If there is a diaper allowance assistance Customer Need for a case then only display the below additional text on the form otherwise this text will not display.

   Your diaper assistance payments will stop when the county stops your cash aid. Diaper assistance is a supportive service given to Welfare to Work (WTW) participants so they can do activities in the WTW Program. WTW activities stop when your cash aid stops. If your cash aid is NOT stopped, your WTW supportive services will not stop, until you get another notice.

7. Add the following barcode options to the NA RE Y (09/2020) form

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Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

8. Add the following print options to the NA RE Y (09/2020) Form:

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

Mailing Requirements:
Mail-To (Recipient): Primary Applicant of the Program selected on the Document Parameters page.
Mailed From (Return): Worker's Office Address of Medi-Cal program
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

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

2.2 Update CW/CF RE Packet Customer Reporting Detail Page to generate NA RE Y (09/2020) Form

2.2.1 Overview

Add a Form generation trigger on Customer Reporting List page when CW/CF RE Packet or CW RE Packet Customer Reporting status is marked as incomplete by marking Cash Aid (CalWORKs) program Redetermination process is not completed.

2.2.2 Customer Reporting List and Customer Reporting Detail Page Mockup

N/A

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2.2.3 Description of Change

1. NA RE Y (09/2020) form generation popup triggered on Customer Reporting List page when user saves CW/CF RE Packet customer reporting status on Customer Reporting Detail page by clicking Save and Return button.

2. Trigger NA RE Y (09/2020) form generation popup on Customer Reporting List page when following conditions are true.
   a. CW/CF RE Packet or CW RE Packet customer reporting status for CalWORKs program changed to Incomplete state.

3. Update the population logic so when NA RE Y (09/2020) form is generated from the Customer Reporting Detail page, the following fields will be pre-populated:

   NOTE: When the NA RE Y (09/2020) form is generated from the Template Repository, it will prepopulate the Standard Header information and other fields as defined in section 2.1.

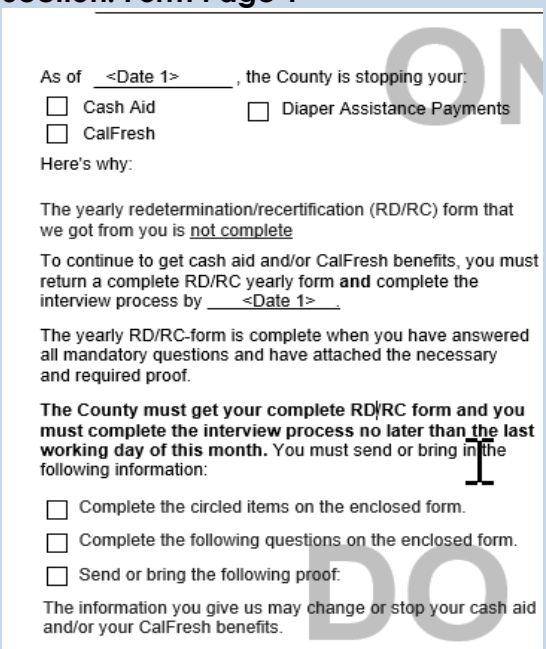
   a. Header fields population

      Standard Header fields will be populated same as defined in section 2.1.2, Recommendation 3 a.

   b. Form fields population

Form Population

Section: Form Page 1



As of <Date 1>, the County is stopping your:

☐ Cash Aid ☐ Diaper Assistance Payments

☐ CalFresh

Here's why:

The yearly redetermination/recertification (RD/RC) form that we got from you is not complete

To continue to get cash aid and/or CalFresh benefits, you must return a complete RD/RC yearly form **and** complete the interview process by <Date 1>.

The yearly RD/RC-form is complete when you have answered all mandatory questions and have attached the necessary and required proof.

The County must get your complete RD/RC form and you must complete the interview process no later than the last working day of this month. You must send or bring in the following information:

☐ Complete the circled items on the enclosed form.

☐ Complete the following questions on the enclosed form.

☐ Send or bring the following proof:

The information you give us may change or stop your cash aid and/or your CalFresh benefits.

Field Name	Type	Value

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Date 1	Date	RE Due month end date in MM/DD/YYYY format.
Cash Aid	Check Box	Always check this box when form triggered from customer reporting page.
Diaper Assistance Payments	Check Box	If there is a diaper allowance assistance Customer Need for case, Check Diaper Assistance Payments check box
CalFresh	Check Box	Blank and Editable.
Complete the circled items on the enclosed form check box	Check Box	Blank and Editable.
Complete the following questions on the enclosed form check box	Check Box	Blank and Editable.
Send or bring the following proof check box	Check Box	Blank and Editable.

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	NA RE Y (09/2020) Form	NAREY_EN.pdf NAREY_SP.pdf NAREY_AE.pdf NAREY_AR.pdf NAREY_CA.pdf NAREY_CH.pdf NAREY_FA.pdf NAREY_HM.pdf NAREY_KO.pdf NAREY_LA.pdf NAREY_RU.pdf NAREY_TG.pdf NAREY_VI.pdf

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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2672	The CONTRACTOR shall migrate NA RE Y - RE/RC Form Incomplete including popup from the Customer Reporting page to the CalSAWS Software.	1. Estimate is for migrating the form in English and Spanish with online trigger. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	With SCR CA-215174 NA RE Y (09/2020)- Notice of Action - Stop Aid; RD / RC Form Incomplete Form is added to LRS/CalSAWS application in English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese languages.

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215302

DDID 1631: Modify RS 51

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Greg Deogracia
	Reviewed By	Thao Ta, Ravneet Bhatia,

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/02/2020	1.0	Initial Release	Greg Deogracia

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1 OVERVIEW

In preparation for migration of C-IV to LRS as part of CalSAWS, detailed code analysis work was conducted from DDID 1061 (CAR-3125) to identify logic gaps that may impact county business processes, to address code gaps between the two systems, and to identify batch scheduling needs and data entry requirements.

DDID 1631 was created to implement the changes identified by the outcome of DDID 1061. Design differences were found for RS 51, Refugee Resettlement Program Caseload Movement Report SCR CA-215302 is to implement the respective design changes.

1.1 Current Design

In both C-IV and LRS, reports are generated on the 1st business day of February, June and October with noted differences found with DDID 1061.

1.2 Requests

In addition to differences identified during review of DDID 1061, include request from SCR CA-57726 [Rejected]***** to align the RS 51 logic with CIV SCR 4493 which has already been implemented.

1. Modify the logic of Part A (Refugee Cash Assistance) of the RS 51 report to be in agreement with the requirements for Part A in the C-IV implementation CIV SCR 4493.

2. Modify the cosmetics of the RS 51 report per DDID 1061.

***Note:** Ref SCR CA-57726 was Rejected, its request for Part A adjustments will be implemented in this SCR.

1.3 Overview of Recommendations

1. Modify the logic of Part A (Refugee Cash Assistance) of the RS 51 report to be in agreement with the requirements for Part A in the C-IV implementation CIV SCR 4493.
2. Modify the cosmetics of the RS 51 report per DDID 1061.

1.4 Assumptions

1. The DDID 1061 analysis was completed as of release 19.05 for this report.

2. Report shall be updated and formatted to be operational with Qlik applications and current Excel version Workbook (*.xlsx).

2 RECOMMENDATIONS

1. Modify the logic of Part A (Refugee Cash Assistance) of the RS 51 report to be in agreement with the requirements for Part A in the C-IV implementation CIV SCR 4493.

2. Modify the cosmetics of the RS 51 Refugee Resettlement Program Caseload Movement Report per DDID 1061.

2.1 RS 51, Refugee Resettlement Program Caseload Movement Report

2.1.1 RS 51 Mockup

State of California - Health and Welfare Agency | California Department of Social Services

Refugee Resettlement Program Caseload Movement Report RS51

DOWNLOAD REPORT FORM FROM:
http://www.cdss.ca.gov/dssdb
E-MAIL COMPLETED REPORT FORM TO:
RPBreports@dss.ca.gov
CONTACT INFO:
NAME: Nam Tran | PHONE: (562) 484-7942

COUNTY NAME	REPORTING PERIOD	REPORT YEAR	DATE
Los Angeles County	**Oct 01 - Jan 31**	**2019**	**FEB-01-20 08:41 PM**

PART A. Refugee Cash Assistance

	1. Number of Persons	2. Number of Cases
1. Previous RCA enrollees still active in this reporting period	0	0
2. New RCA enrollees during this reporting period	0	0
a. New arrivals	0	0
b. Secondary migrants	0	0
c. Former Matching Grant Clients	0	0
d. RCA re-applicants	0	0
3. Total number of RCA recipients during this reporting period	0	0

PART B. Reason and number of exemptions from registration for Employment Services by RCA recipients

4. Reason of exemption (see instructions)	Total Number
MPP Section 69-207.3(a)	0
MPP Section 69-207.3(b)	0
MPP Section 69-207.3(c)	0
MPP Section 69-207.3(d)	0
MPP Section 69-207.3(e)	0
MPP Section 69-207.3(f)	0
MPP Section 69-207.3(g)	0
MPP Section 69-207.3(h)	0
MPP Section 69-207.3(i)	0
MPP Section 69-207.3(j)	0
MPP Section 69-207.3(k)	0

PART C. General Assistance

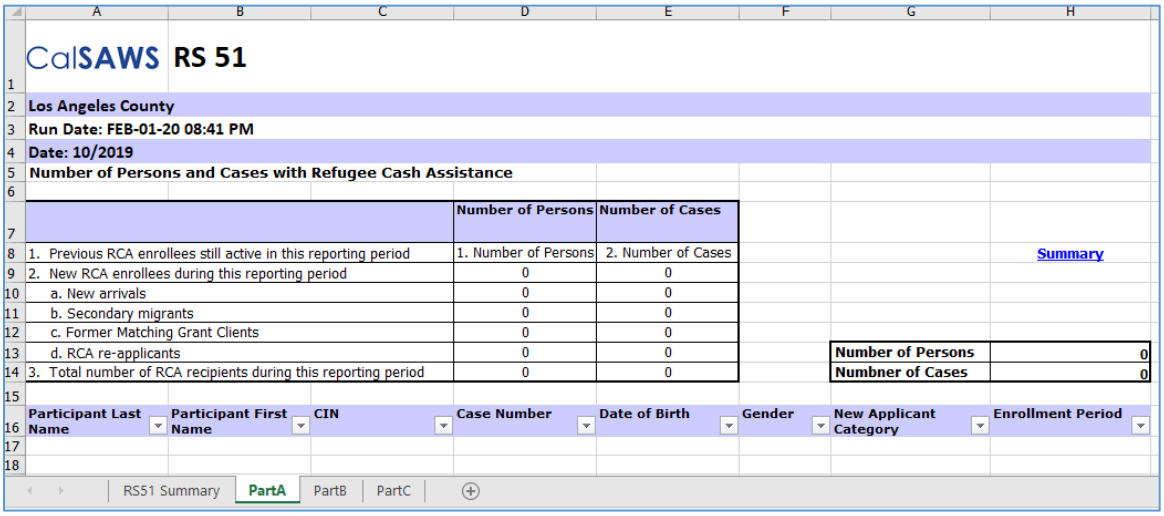
	1. Number of Persons	2. Number of Cases
5. General Assistance/General Relief	0	0

Counties may direct any questions about the report to the Refugee Programs Bureau at (916) 654-4356

Part B.4. Reason of Exemptions
MPP Section 69-207.3 (for your reference)

a.	A person under 16 years of age.
b.	A person age 60 or older.
c.	A person 16 or 17 years of age who is a full-time student as defined by the age chapter of the CalWORKs regulations.
d.	A person 18 years of age who is a full-time student in a secondary school (12th grade or below) or in equivalent level of vocational or technical training as defined by the age chapter of the CalWORKs regulations, if the person is expected to complete 12th grade or the training program prior to his/her 19th birthday.
e.	A person who is at least 16 but not yet 18 years and participating full time in vocational or technical school or training which is considered appropriate by the CWD.
f.	A person who is ill or injured, when his/her illness or injury is verified by a physician's written statement that the illness or injury is serious enough to temporarily prevent his/her entry into employment or an employment-directed education/training program.
g.	A person who is incapacitated, when it is determined that the physical or mental impairment, by itself or in conjunction with age, prevents the individual from engaging in employment or participating in an employment-directed education/training program. The criteria for determination of incapacity as outlined in MPP Section 41-430.2 shall be applied.
h.	A person whose presence in the home is required on a substantially continuous basis because of the physical or mental impairment of another member in the household, when verified by a physician's written statement.
i.	The parent or other caretaker relative of a child under six months of age who is personally providing full-time care for the child with only very brief and infrequent absences from the child. Only one parent or other relative in a case may be exempt.
j.	A person who is working more than 32 hours a week in unsubsidized employment which is expected to last a minimum of 30 days. This exemption continues to apply if there is a temporary break in full-time employment which is expected to last no longer than 10 workdays.

Figure 2.2.1.1 – RS51 Summary worksheet



CalSAWS RS 51

Los Angeles County

Run Date: FEB-01-20 08:41 PM

Date: 10/2019

Number of Persons and Cases with Refugee Cash Assistance

	Number of Persons	Number of Cases
1. Previous RCA enrollees still active in this reporting period	1. Number of Persons	2. Number of Cases
2. New RCA enrollees during this reporting period	0	0
a. New arrivals	0	0
b. Secondary migrants	0	0
c. Former Matching Grant Clients	0	0
d. RCA re-applicants	0	0
3. Total number of RCA recipients during this reporting period	0	0

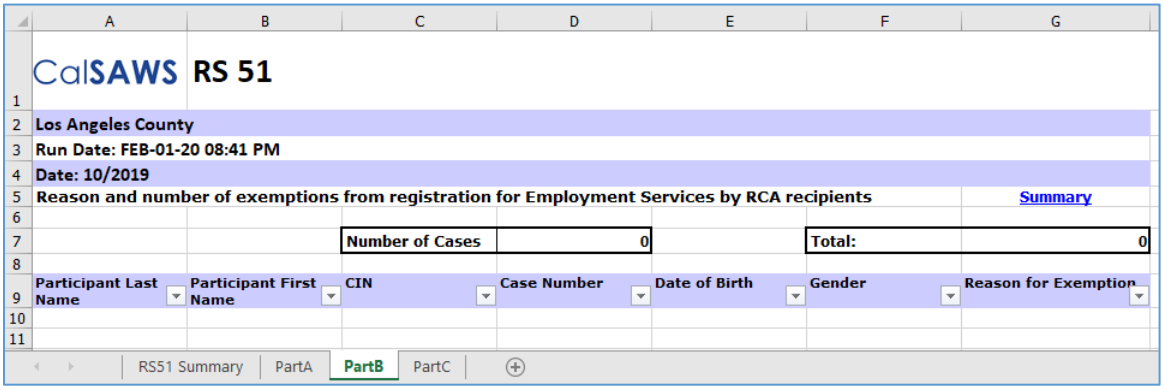
Summary

Number of Persons	0
Numbner of Cases	0

Participant Last Name	Participant First Name	CIN	Case Number	Date of Birth	Gender	New Applicant Category	Enrollment Period

RS51 Summary | PartA | PartB | PartC

Figure 2.2.1.2 - PartA worksheet



CalSAWS RS 51

Los Angeles County

Run Date: FEB-01-20 08:41 PM

Date: 10/2019

Reason and number of exemptions from registration for Employment Services by RCA recipients

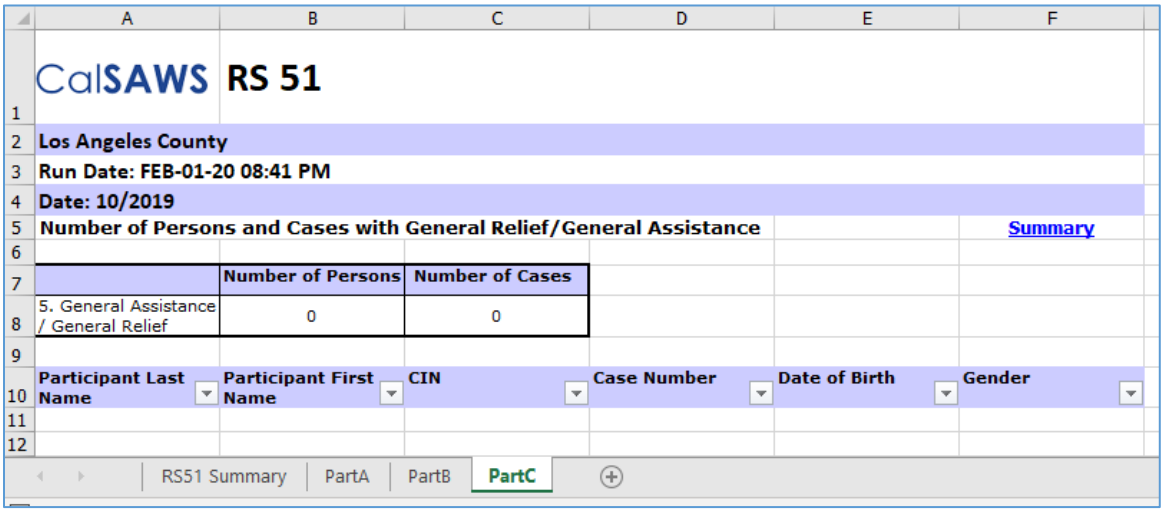
Summary

Number of Cases	0	Total:	0

Participant Last Name	Participant First Name	CIN	Case Number	Date of Birth	Gender	Reason for Exemption

RS51 Summary | PartA | PartB | PartC

Figure 2.2.1.3 – PartB worksheet



CalSAWS RS 51

Los Angeles County

Run Date: FEB-01-20 08:41 PM

Date: 10/2019

Number of Persons and Cases with General Relief/General Assistance

Summary

	Number of Persons	Number of Cases
5. General Assistance / General Relief	0	0

Participant Last Name	Participant First Name	CIN	Case Number	Date of Birth	Gender

RS51 Summary | PartA | PartB | PartC

Figure 2.2.1.4 – PartC worksheet

2.1.2 Description of Change

1. Logic updates per DDID 1631 recommendations to bring forward C-IV code to CalSAWS.

Type of Update	Description
Logic 1*, **	Add C-IV codes to LRS code, MPP Section 69-207 .3(g) 28 - Federal Soc Sec Disability Ins (SSDI) PH - Physically/Mentally Incapacitated Y5 - Federal Soc Sec Disability Ins (SSDI)
Logic 2*, **	Add C-IV codes to LRS code, MPP Section 69-207 .3(h) 26 - Parent Caring for Disabled HH Member 27 - Non-Parent Caring for Disabled HH Member Y3 - Parent Caring for Disabled HH Member Y4 - Non-Parent Caring for Disabled HH Member
Logic 3*, **	Add C-IV codes to LRS code, MPP Section 69-207 .3(i) 10 - NONPARENT RELATIVE FOR AT RISK CHILD 16 - CARE SUBSEQUENT CHILD 32 - CARE OF 2 OR MORE CHILDREN UNDER AGE 6 W3 - AIDED RELATIVE FOR CHILD W4 - CARE SUBSEQUENT CHILD W5 - CARE FIRST CHILD
Logic 4*, **	Add C-IV codes to LRS code, MPP Section 69-207 .3(k) PR - Pregnant and Doctor states unable to work
Logic	Add logic for case and person count summary tables per cosmetic requirements.

***Tech Note:** Reference: 6. Appendix, Logic 1-4 for additional code and description of difference details.

****Tech Note:** Reference: 6. Appendix, Per DDID 1631; Code construction logic in C-IV is different from LRS. C-IV logic first checks the Work Registration Exemption Reasons (Category -249). When there is no Work Registration Exemption, the WTW program person will be evaluated for an Exempt status. The Program Status Reason Codes (category 73) are used.

LRS logic checks only the Work Registration Exemption Reasons (Category -249).

2. Update LRS reports per DDID 1631 to bring forward RS 51 cosmetic report recommendations.

Type of Update	Description
Cosmetic	Add hyperlinks in RS51 Summary worksheet Line 3 and 5 to details Part A tabs.
Cosmetic	Part A worksheet add "and Cases" to title header line (Number of Persons and Cases…)
Cosmetic	Add header lines, add Part A table, add Summary tab hyperlink, relocate page title per RS51.Mockup.xlsx
Cosmetic	Add Number of Person and Number of Cases count summary table to Part A Tab
Cosmetic	Add Number of Number of Cases count summary table to Part B Tab
Cosmetic	Relocate page title, add Summary tab hyperlink per RS51.Mockup.xlsx
Cosmetic	Add Number of Person and Number of Cases count summary table to Part C Tab, add Summary tab hyperlink per RS51.Mockup.xlsx

Tech Note: Reference 3. Supporting Documents for RS 51_Mockup.xlsx

2.1.3 Report Location

- **Global:** Scheduled
- **Local:** State
- **Task Name:** RS-51

2.1.4 Counties Impacted

All CalSAWS counties will notice modifications from previous RS 51 reports due to both logic and cosmetic updates.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Report	RS 51_Mockup.xlsx	RS 51_Mockup.xlsx
2	Reports	Copy DDID 1061 TAB RS-51 (reference)	COPY DDID 1061 TAB-RS 51.xlsx

Return 2.1.3 Description of Change

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1631	This is a State Report design difference that has been approved to be funded through DDID 1631	- 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 revised or new reporting requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the 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.	Through the implementation of CA-215302

5 OUTREACH

6 APPENDIX

Return 2.1.3 Description of Change

Logic 1

C-IV Details	LRS Details	Functional Detailed Description of Difference
C-IV uses the following exemption reasons for counting the case/person in PART A, MPP Section 69-207 .3(g). 04 - Physically/Mentally Incapacitated 28 - Federal Soc Sec Disability Ins (SSDI). C-IV also uses the following program status reasons for counting the case/person in PART A, MPP Section 69-207 .3(g). PH - Physically/Mentally Incapacitated Y5 - Federal Soc Sec Disability Ins (SSDI) C-IV does not use the EDBC determined reason as follows: 44 - Disabled (EDBC determined) C-IV Code: + " WHEN (wr.stat rsn code in ('" + Codes.CT249 04 PHYSICALLY MENTALLY INCAPACITATED + "', '" + Codes.CT249 28 FEDERAL SOC SEC DISABILITY INS SSDI + "')" + " or" + " wt pgm.stat rsn code in ('" + Codes.CT73 PH PHYSICALLY MENTALLY INCAPACITATED + "', '" + Codes.CT73 Y5 FED SOC SEC DISABILITY INS SSDI + "')" + ")" + " THEN 'g'"	LRS uses the following reasons: 04 - Physically/Mentally Incapacitated 44 - Disabled (EDBC determined) LRS Code: WHEN WRK REGISTR.STAT CODE = 'EX' AND WRK REGISTR.STAT RSN CODE IN ('04','44') THEN 'MPP Section 69-207 .3(g)'	Code construction logic in C-IV is different from LRS. C-IV logic first checks the Work Registration Exemption Reasons (Category -249). When there is no Work Registration Exemption, the WTW program person will be evaluated for an Exempt status. The Program Status Reason Codes (category 73) are used. LRS logic checks only the Work Registration Exemption Reasons (Category -249).

Logic 2

C-IV Details	LRS Details	Functional Detailed Description of difference
C-IV uses the following exemption reasons for counting the case/person in PART A, MPP Section 69-207 .3(h). 05 - Cares for HH Member Mental/Physically Impaired 26 - Parent Caring for Disabled HH Member 27 - Non-Parent Caring for Disabled HH Member C-IV also uses the following program status reasons for counting the case/person in PART A, MPP Section 69-207 .3(h). Y3 - Parent Caring for Disabled HH Member Y4 - Non-Parent Caring for Disabled HH Member C-IV Code: + " WHEN (wr.stat rsn code in ('" + Codes.CT249 05 CARES HH MEMBER IMPAIRED + "'," + " '" + Codes.CT249 26 PARENT CARING FOR DISABLED HH MEMBER + "'," + " '" + Codes.CT249 27 NONPARENT CARING FOR DISABLED HH MEMBER + "'" + ")" + " or" + " wt pgm.stat rsn code in ('" + Codes.CT73 Y3 PARENT CARING DISABLED HH MEMBER + "'," + " '" + Codes.CT73 Y4 NONPARENT CARING DISABLED HH MEMBER + "')" + ")" + " THEN 'h'"	LRS uses the following reason: 05 - Cares for HH Member Mental/Physically Impaired LRS Code: WHEN WRK REGISTR.STAT CODE = 'EX' AND WRK REGISTR.STAT RSN CODE = '05' THEN 'MPP Section 69-207 .3(h)'	Code construction logic in C-IV is different from LRS. C-IV logic first checks the Work Registration Exemption Reasons (Category -249). When there is no Work Registration Exemption, the WTW program person will be evaluated for an Exempt status. The Program Status Reason Codes (category 73) are used. LRS logic checks only the Work Registration Exemption Reasons (Category -249).

Logic 3

C-IV Details	LRS Details	Functional Detailed Description of difference
C-IV uses the following exemption reasons for counting the case/person in PART A, MPP Section 69-207 .3(i). 09 - CARE FIRST CHILD 10 - NONPARENT RELATIVE FOR AT RISK CHILD 16 - CARE SUBSEQUENT CHILD 32 - CARE OF 2 OR MORE CHILDREN UNDER AGE 6 34 - CARE CHILD 23 MONTHS YOUNGER C-IV also uses the following program status reasons for counting the case/person in PART A, MPP Section 69-207 .3(i). W3 - AIDED RELATIVE FOR CHILD W4 - CARE SUBSEQUENT CHILD W5 - CARE FIRST CHILD C-IV does not use the following EDBC determined reason. 45 - Care of First Child (EDBC determined) C-IV Code: + " WHEN (wr.stat_rsn_code in ('" + Codes.CT249_09_CARE_FIRST_CHILD + "'," + " '" + Codes.CT249_10_NONPARENT_RELATIVE_FOR_AT_RISK_CHILD + "'," + " '" + Codes.CT249_16_CARE_SUBSEQUENT_CHILD + "'," + " '" + Codes.CT249_32_CARE_OF_2_OR_MORE_CHILDREN_UNDER_AGE_6 + "'," + " '" + Codes.CT249_34_CARE_CHILD_23_MONTHS_YOUNGER + "')" + " or" + " wt_pgm.stat_rsn_code in ('" + Codes.CT73_W3_AIDED_RELATIVE_FOR_CHILD + "'," + " '" + Codes.CT73_W4_CARE_SUBSEQUENT_CHILD + "'," + " '" + Codes.CT73_W5_CARE_FIRST_CHILD + "')" + ")" + " THEN 'i'" LRS Code: WHEN WRK_REGISTR.STAT_CODE = 'EX' AND WRK_REGISTR.STAT_RSN_CODE = '34' THEN 'MPP Section 69-207 .3(i)'	LRS uses the following reasons: 34 - CARE CHILD 23 MONTHS YOUNGER 45 - Care of First Child (EDBC determined) 09 - Care of First Child LRS Code: WHEN WRK_REGISTR.STAT_CODE = 'EX' AND WRK_REGISTR.STAT_RSN_CODE = '34' THEN 'MPP Section 69-207 .3(i)' -- WHEN WRK_REGISTR.STAT_CODE = 'EX' AND WRK_REGISTR.STAT_RSN_CODE IN ('45','09') THEN 'MPP Section 69-207 .3(i)'	Code construction logic in C-IV is different from LRS. C-IV logic first checks the Work Registration Exemption Reasons (Category -249). When there is no Work Registration Exemption, the WTW program person will be evaluated for an Exempt status. The Program Status Reason Codes (category 73) are used. LRS logic checks only the Work Registration Exemption Reasons (Category -249).

Logic 4

C-IV Details	LRS Details	Functional Detailed Description of difference
C-IV uses the following exemption reasons for counting the case/person in PART A, MPP Section 69-207 .3(k). 07 - Pregnant and Doctor states unable to work C-IV also uses the following program status reasons for counting the case/person in PART A, MPP Section 69-207 .3(k). PR - Pregnant and Doctor states unable to work C-IV Code: + " WHEN (wr.stat_rsn_code = '" + Codes.CT249_07_PREGNANT_UNABLE_TO_WORK + "'" + " or" + " wt_pgm.stat_rsn_code = '" + Codes.CT73_PR_PRAGNANT_UNABLE_TO_WORK + "'" + ")" + " THEN 'k'"	LRS uses the following reason: 07 - Pregnant and Doctor states unable to work LRS Code: WHEN WRK_REGISTR.STAT_CODE = 'EX' AND WRK_REGISTR.STAT_RSN_CODE = '07' THEN 'MPP Section 69-207 .3(k)'	Code construction logic in C-IV is different from LRS. C-IV logic first checks the Work Registration Exemption Reasons (Category -249). When there is no Work Registration Exemption, the WTW program person will be evaluated for an Exempt status. The Program Status Reason Codes (category 73) are used. LRS logic checks only the Work Registration Exemption Reasons (Category -249).

Return [2.1.3 Description of Change]

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216117

Migrate the IVR 100 and 101 Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Priya Sridharan, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2020	1.0	Initial Revision	Rainier Dela Cruz

.

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1 OVERVIEW

The C-IV Interactive Voice Response (IVR) system generates automated voice messages about a customer future appointments or documents that the customer have not submitted and contacts the customer with the phone number they have provided. The IVR 100 (IVR Notification Consent Letter) form is sent to the customer to gain their consent to be contacted by the IRV system.

The customer is provided a Personal Identification Number (PIN) to access the IVR system. The IVR 101 (New IVR PIN Letter) form is sent to the customer to provide the customer with a new PIN.

1.1 Current Design

The IVR 100 and IVR 101 forms are not available in CalSAWS.

1.2 Requests

Migrate the IVR 100 and IVR 101 forms from C-IV to CalSAWS.

1.3 Overview of Recommendations

1. Create the CSF 139 form – **Consent to Receive Automated Messages About Your Case** based on the C-IV IVR 100 form.
2. Create the CSF 140 form – **New Phone Access IVR PIN Letter** based on the C-IV IVR 101 form.

1.4 Assumptions

1. The CSF 139 and CSF 140 forms will only be in English and Spanish.
2. The CSF 139 and CSF 140 will only be available to the Migration Counties. Los Angeles County will continue to use the existing forms (PA 6049 and PA 6050).
3. Migration of the C-IV IVR functionality to CalSAWS will be done with SCR **CA-220977**. The IVR webservice is responsible for inserting a record in the system transaction table to generate the CSF 140 through batch.

2 RECOMMENDATIONS

2.1 Add the new CSF 139 Consent Letter

2.1.1 Overview

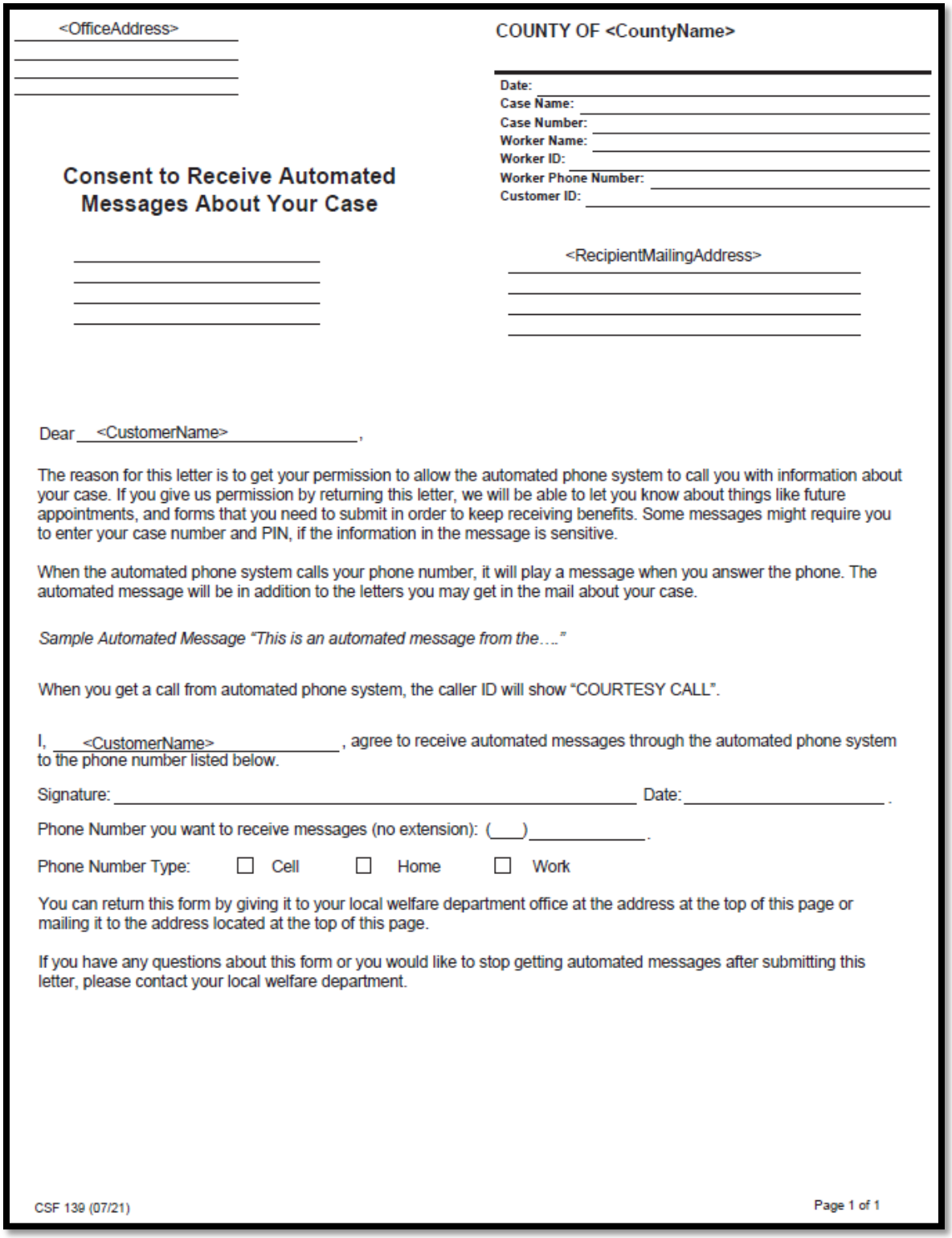
Create the CSF 139 form based on the C-IV IVR 100 form.

Programs: CalWORKs, CalFresh, Medi-Cal
Attached Forms: N/A
Forms Category: Forms
Current Languages: English, Spanish
Template Repository Visibility: Migration Counties

2.1.2 Description of Change

1. Create the CSF 139 in English and Spanish and add it to Template Repository.

   Form Header: CalSAWS Header (Header 1)
   Form Footer: CalSAWS Footer (Footer 1)
   Form Title: Consent to Receive Automated Messages About Your Case
   Form Number: CSF 139
   Imaging Form Name: Consent to Receive Automated Messages
   Imaging Document Type: E-Notification
   Include NA Back 9: No
   Form Mockup/Example: Please see below and refer to **Section 3.0 Supporting Documents #1.**



<OfficeAddress>

COUNTY OF <CountyName>

Date:
Case Name:
Case Number:
Worker Name:
Worker ID:
Worker Phone Number:
Customer ID:

Consent to Receive Automated Messages About Your Case

<RecipientMailingAddress>

Dear <CustomerName>,

The reason for this letter is to get your permission to allow the automated phone system to call you with information about your case. If you give us permission by returning this letter, we will be able to let you know about things like future appointments, and forms that you need to submit in order to keep receiving benefits. Some messages might require you to enter your case number and PIN, if the information in the message is sensitive.

When the automated phone system calls your phone number, it will play a message when you answer the phone. The automated message will be in addition to the letters you may get in the mail about your case.

Sample Automated Message "This is an automated message from the…."

When you get a call from automated phone system, the caller ID will show "COURTESY CALL".

I, <CustomerName>, agree to receive automated messages through the automated phone system to the phone number listed below.

Signature: _____ Date: _____.

Phone Number you want to receive messages (no extension): (___)_____.

Phone Number Type: ☐ Cell ☐ Home ☐ Work

You can return this form by giving it to your local welfare department office at the address at the top of this page or mailing it to the address located at the top of this page.

If you have any questions about this form or you would like to stop getting automated messages after submitting this letter, please contact your local welfare department.

CSF 139 (07/21)

Page 1 of 1

Figure 2.1.1 – CSF 139 Mockup

a. Update the form number on the footer to CSF 139
b. Remove the reference to the C-IV system.

c. Update the 'Sample IVR Voice Message' to say: "*This is an automated message from the….*"
d. The Document Parameters will have the following inputs:
    i. Case Number
    ii. Customer Name
    iii. Program
    iv. Language

2. Add the population logic for the form. The variables will be populated as follows:

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 139 – Page 1	**County Name**	This field will be populated with the county name.	Y	Y
CSF 139 – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y
CSF 139 – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y
CSF 139 – Page 1	**Case Name**	This field will be populated with the case name of the current case.	Y	Y
CSF 139 – Page 1	**Case Number**	This field will be populated with the case number of the current case.	Y	Y
CSF 139 – Page 1	**Worker Name**	This field will be populated with the name of the	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
		worker assigned to the program.		
CSF 139 – Page 1	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y
CSF 139 – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y
CSF 139 – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y
CSF 139 – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the person selected from the Customer Name dropdown on the Documents Parameter page when generating from Template Repository.	Y	Y
CSF 139 – Page 1	**Customer Name**	This field will be populated with the name of the person selected from the	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
		Customer Name dropdown on the Documents Parameter page when generating from Template Repository.		

3. The form will have the following print options:

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

4. The form will have the following mailing options:

Mailing Options	Option for CSF 139
Mail-To (Recipient)	The address of the person select from the Customer Name dropdown on the Documents Parameter page when generating from Template Repository.
Mailed From (Return)	Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A

5. The form will have the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form will have the following additional options:

Additional Options	Option for CSF 139
Special Paper Stock	N/A
Enclosures	N/A

Additional Options	Option for CSF 139
Electronic Signature	Yes
Check to Sign	Yes
Post to Self Service Portal	Yes

2.2 Add the new CSF 140 New Pin Letter

2.2.1 Overview

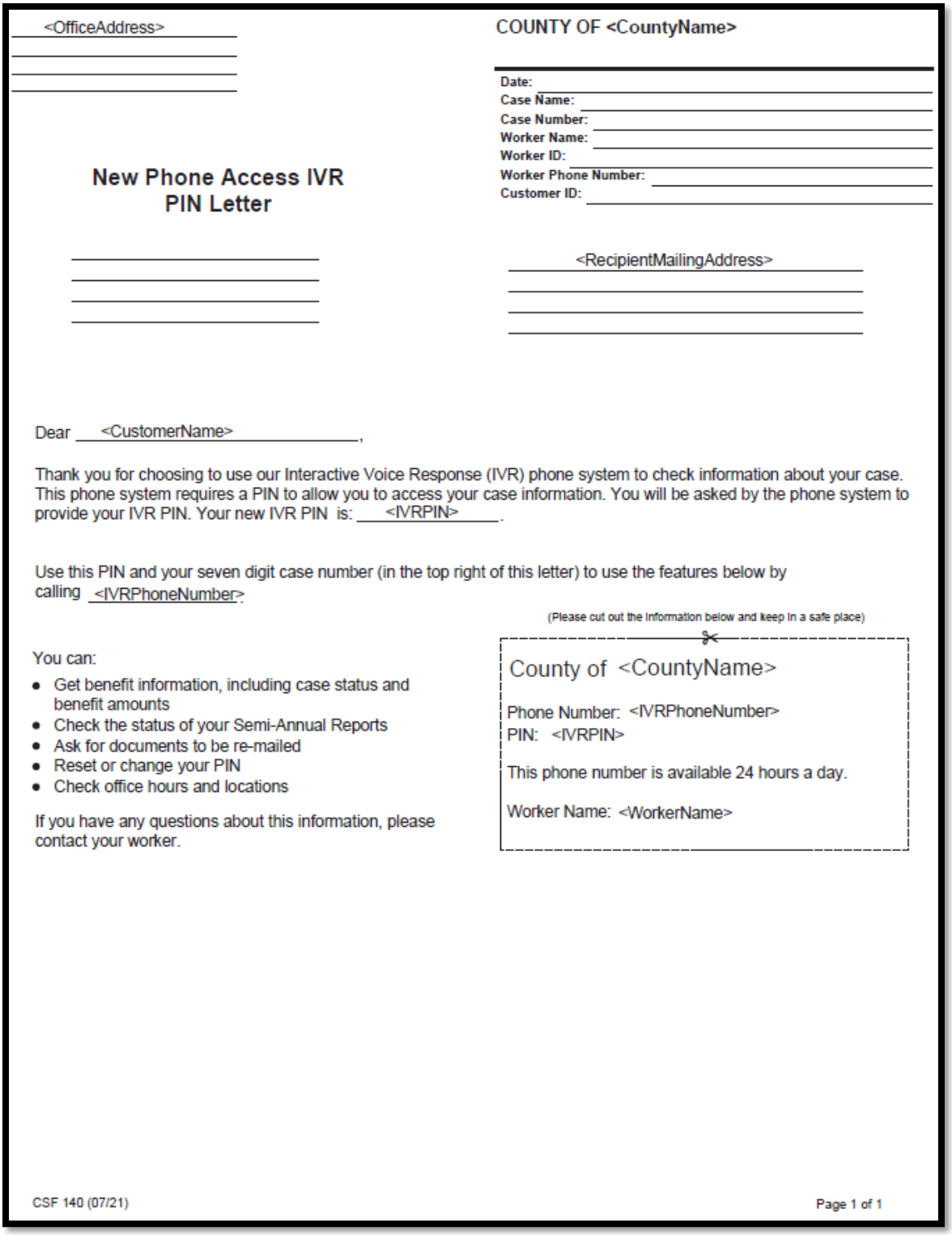
Create the CSF 140 form based on the C-IV IVR 101 form.

Programs: CalWORKs, CalFresh, Medi-Cal
Attached Forms: N/A
Forms Category: Forms
Current Languages: English, Spanish
Template Repository Visibility: Migration Counties

2.2.2 Description of Change

1. Create the CSF 140 in English and Spanish and add it to Template Repository.

   Form Header: CalSAWS Header (Header 1)
   Form Footer: CalSAWS Footer (Footer 1)
   Form Title: New Phone Access IVR PIN Letter
   Form Number: CSF 140
   Imaging Form Name: New Phone Access IVR PIN Letter
   Imaging Document Type: E-Notification
   Include NA Back 9: No
   Form Mockup/Example: Please see below and refer to **Section 3.0 Supporting Documents #2.**



<OfficeAddress>

COUNTY OF <CountyName>

Date:
Case Name:
Case Number:
Worker Name:
Worker ID:
Worker Phone Number:
Customer ID:

New Phone Access IVR PIN Letter

<RecipientMailingAddress>

Dear <CustomerName>,

Thank you for choosing to use our Interactive Voice Response (IVR) phone system to check information about your case. This phone system requires a PIN to allow you to access your case information. You will be asked by the phone system to provide your IVR PIN. Your new IVR PIN is: <IVRPIN>.

Use this PIN and your seven digit case number (in the top right of this letter) to use the features below by calling <IVRPhoneNumber>:

You can:

- Get benefit information, including case status and benefit amounts
- Check the status of your Semi-Annual Reports
- Ask for documents to be re-mailed
- Reset or change your PIN
- Check office hours and locations

If you have any questions about this information, please contact your worker.

(Please cut out the information below and keep in a safe place)

County of <CountyName>

Phone Number: <IVRPhoneNumber>
PIN: <IVRPIN>

This phone number is available 24 hours a day.

Worker Name: <WorkerName>

CSF 140 (07/21)

Page 1 of 1

Figure 2.2.1 – CSF 140 Mockup

a. Update the form number on the footer to CSF 140
b. Remove the reference to the C-IV system.

c. Remove the reference to the C4Yourself Self Service system.
d. The Document Parameters will have the following inputs:
    i. Case Number
    ii. Customer Name
    iii. Program
    iv. Language

2. Add the population logic for the form. The variables will be populated as follows:

Section	Field	Population	Populates from Template Repository	Populates from Batch	Editable from Template Repository
CSF 140 – Page 1	**County Name**	This field will be populated with the county name based on the case number.	Y	Y	Y
CSF 140 – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y	Y
CSF 140 – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CSF 140 – Page 1	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y
CSF 140 – Page 1	**Case Number**	This field will be populated with the case	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates from Batch	Editable from Template Repository
		number of the current case.			
CSF 140 – Page 1	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y	Y
CSF 140 – Page 1	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y	Y
CSF 140 – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y	Y
CSF 140 – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CSF 140 – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the person selected from	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates from Batch	Editable from Template Repository
		the Customer Name dropdown on the Documents Parameter page when generating from Template Repository.			
CSF 140 – Page 1	**Customer Name**	This field will be populated with the name of the person selected from the Customer Name dropdown on the Documents Parameter page when generating from Template Repository. If the form is generated through batch, it the person that requested the PN from the IVR system (PERS_ID value for the record inserted in SYS_TRANSACT table)	Y	Y	Y
CSF 140 – Page 1	**IVR Phone Number**	This field will be populated with the IVR phone	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates from Batch	Editable from Template Repository
		number. The phone number is stored in the IVR_PH_NUM table.			
CSF 140 – Page 1	**IVR PIN**	This field will be populated with the IVR PIN. The PIN is stored in the IVR_PERS table.	Y	Y	Y

3. The form will have the following print options:

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

4. The form will have the following mailing options:

Mailing Options	Option for CSF 140
Mail-To (Recipient)	The address of the person select from the Customer Name dropdown on the Documents Parameter page when generating from Template Repository or the person that requested the new PIN from the IVR system when generated through batch.
Mailed From (Return)	Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A

5. The form will have the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form will have the following additional options:

Additional Options	Option for CSF 140
Special Paper Stock	N/A
Enclosures	N/A
Electronic Signature	No
Check to Sign	No
Post to Self Service Portal	Yes

7. Update the reference table values in the Batch Eligibility Sweep Codes category (942) to send out the CSF 140.

   Technical Note: The current code number identification in CT 942 is 'PI'.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 139 Mockup	CSF139_EN.pdf CSF139 _SP.pdf
2	Client Correspondence	CSF 140 Mockup	CSF140_EN.pdf CSF140 _SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions;	Added the CSF 139, IVR Notification Consent Letter, and the CSF 140, New IVR PIN Letter, to CalSAWS.

	u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216887

Update GROW 85 - Job Search Assignment to reflect telephonic calls due to COVID-19

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong
	Reviewed By	Amy Gill, Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/26/2020	1.0	Original Draft	Phong Xiong

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1 OVERVIEW

This SCR is to modify the language of GROW 85 Job Search Assignment form to change the location from a physical district office address to a telephonic call and/or online video due to the delay in opening of the district offices due to COVID-19.

1.1 Current Design

Currently in CalSAWS the GROW 85 – Job Search Assignment verbiage reflects a physical district office location. The form is only available for Los Angeles County.

This form currently exists in the following languages: Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese.

1.2 Requests

1. As per the direction from Los Angeles County, update the GROW 85 – Job Search Assignment to reflect the verbiage related to the virtual/telephonic appointment details.
2. Create a future SCR for updates to the threshold languages versions to match the updated English and Spanish versions.

1.3 Overview of Recommendations

1. Update the GROW 85 – Job Search Assignment with verbiage reflecting change of location from a physical district office address to a telephonic call, contact person due to the delay in opening of the district offices due to COVID-19.
2. Updates are only in English and Spanish; the County worker will send the revised English version with the GEN 1365 to the population of people in need of the other languages.

1.4 Assumptions

1. A future SCR (CA-221281) has been created to update the threshold language versions to match the updated English and Spanish versions.
2. For the threshold languages that are turned off, it will be the County worker's responsibility to include the GEN 1365 with the GROW 85 English version before mailing the form to the appropriate population.

2 RECOMMENDATIONS

2.1 Updates to GROW 85 - General Relief Opportunities For Work Job Search Assignment

2.1.1 Overview

GROW 85 (05/2021) - General Relief Opportunities For Work Job Search Assignment is used to document a GROW participant's job search requirement as part of the GROW program. The form will be submitted to the GROW worker once completed.

State Form/NOA: GROW 85 (05/2021)

Program(s): General Relief Opportunities For Work (GROW)

Current Attached Forms: N/A

Current Forms Category: Form

Existing Languages:

Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese

2.1.2 Updates to Form XDP

Update GROW 85 (05/2021) with modified verbiage as requested and highlighted by Los Angeles County.

Updated Languages:

English and Spanish

NOA Mockups/Examples: See Supporting Documents #1

Existing Text	Updated Text	Location in Document
Please review the job search instructions in the box below. Contact your GROW Worker if you have questions regarding your job search assignment.	Please review the job search instructions in the box below. Contact your GROW Worker if you have questions regarding your job search assignment and to complete your telephone appointment.	First Page – First Paragraph

Existing Text	Updated Text	Location in Document
You are required to participate in 20-hours a week of job search activities. Record each job search on the job search log on the backside of this form. You must bring this form to your GROW Worker on the following date and time.	You are required to participate in 20-hours a week of job search activities. Record each job search on the job search log on the backside of this form. You must send this form to your GROW Worker on the following date and time.	First Page – Center paragraph in first block
Return Appointment:	Telephone Appointment:	Second Page – Participant Information

2.1.3 Turn Off Threshold Language Forms

This effort is updating the English and Spanish versions only. The following threshold languages for this form will be turned off:

Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, and Vietnamese

SCR CA-221281 will update the threshold forms in the future.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	GROW 85 Mockup	GROW85_EN_Mock_Up.pdf GROW85_SP_Mock_Up.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	Update GROW85 With appropriate verbiage

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219536

Migrate Vendor Number field from C-IV to CalSAWS

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/09/2020	1.0	Initial	Erika Kusnadi-Cerezo
11/17/2020	2.0	Added to the Overview section (2.1.1 and 2.2.1) to add more information on the purpose of the Vendor Information page	Erika Kusnadi-Cerezo
11/24/2020	3.0	Added Automated Regression Test section (2.3)	William Baretsky
11/25/2020	4.0	Removed 1099 reference from 2.1.1 and 2.2.1 section	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Vendor Information List page allows Users to view a list of Vendor ID information and the Vendor Information Detail page allows Users to Add/Edit the Vendor ID, Begin Date and End Date for the Vendor.

1.1 Current Design

Currently C-IV counties tracks the Foster Care Vendor Information through the Vendor Information List and Vendor Information Detail page. The Vendor Information inputted for the specific Foster Care Resource that is being viewed are then used for the C-IV County Financial System.

Both the Vendor Information List and Vendor Information Detail page are not enabled in the CalSAWS system. As a result, users are not able to view, add or edit the Vendor Information for the specific Foster Care Resource that they are viewing.

1.2 Requests

1. Enable the Vendor Information List page and the Vendor Information Detail page to allow Users to view, add or edit Vendor Information for the specific Foster Care Resource that they are viewing.

1.3 Overview of Recommendations

1. Enable the Vendor Information List page and the Vendor Information Detail page for Foster Care Resources in CalSAWS.

   Note: There will be no impact to LA County business process. The other 57 Counties will see the LA information on the Foster Care Resource Detail page, but they will be able to use the Vendor Information page to enter any county specific information.

1.4 Assumptions

1. All C-IV interfaces that interfaced with the C-IV County Financial system will be migrated over to CalSAWS under DDID 1787 and DDID 1789.

2 RECOMMENDATIONS

Enable the Vendor Information List page and the Vendor Information Detail page to allow Users to view, add or edit the Vendor Information for the specific Foster Care Resource that they are viewing in the CalSAWS system.

2.1 Vendor Information List

2.1.1 Overview

Enable the Vendor Information List page to allow Users to view, add, or edit Vendor Information for the specific Foster Care Resource that they are viewing.

Information added on the Vendor Information page will then be used for the County Financial Accounting Systems (this does not apply to LA County, since their business process will remain unchanged).

2.1.2 Vendor Information List Mockup

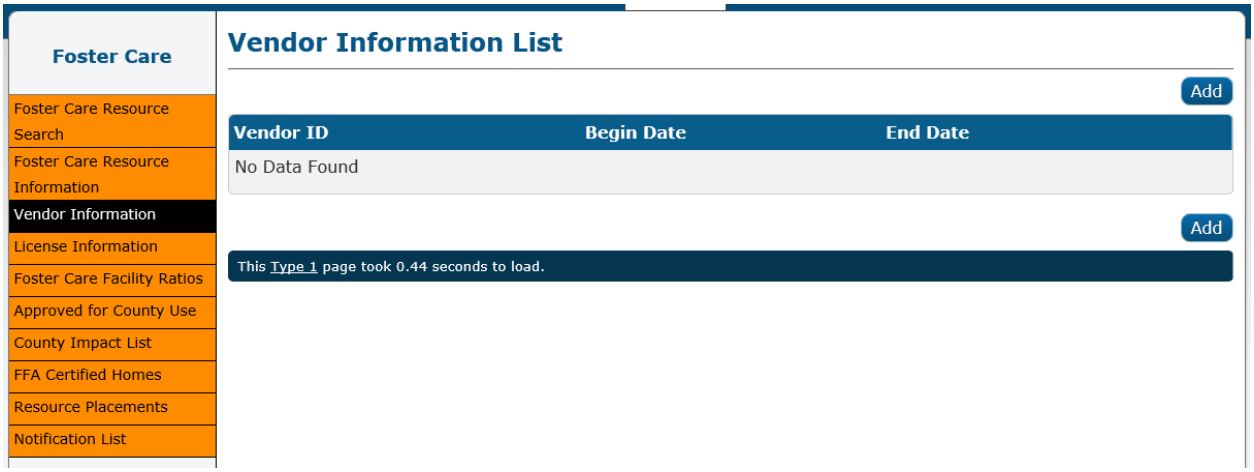

Figure 2.1.1a – Vendor Information List

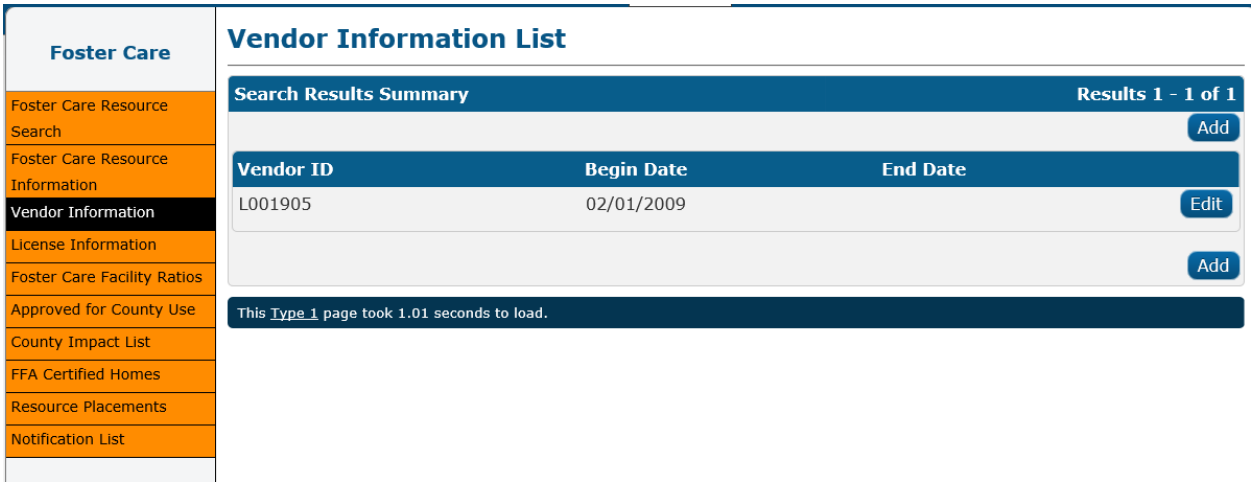

Figure 2.1.1b – Vendor Information List

2.1.3 Description of Changes

1. Enable the Vendor Information List page for Foster Care Resources in CalSAWS as shown in Figure 2.1.1a and Figure 2.1.1b.
    a. The Vendor Information List page will display the Vendor ID information that is tied to the specific Foster Care Resource that is selected.
        i. The Vendor Information List page will display 'No Data Found' if there is no Vendor Information that was added for a specific Foster Care Resource.
        ii. The Vendor Information List page will display the following information if there is Vendor Information that was added for a specific Foster Care Resource.
            1. Vendor ID
            2. Begin Date
            3. End Date

        Note: Vendor Information is added through the Vendor Information Detail page. Please see section 2.2 for more details.

    b. The Vendor Information List page will have an 'Add' button.
        i. Upon clicking the 'Add' button it will take the User to the Vendor Information Detail page in 'Create' mode.
    c. The Vendor Information List page will have an 'Edit' button.
        i. Upon clicking the 'Edit' button it will take the User to the Vendor Information Detail page in 'Edit' mode for that specific Vendor Information that is selected.
        ii. 'Edit' button only display when there's a Vendor Information listed on the Vendor Information List page.

2.1.4 Page Location

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

The Vendor Information will be listed between the Foster Care Resource Information and Approved for County Use links on the Task Navigation Bar.

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
VendorInformationList	Vendor Information List	Vendor View and Vendor Edit
VendorInformationDetailEdit	Vendor Information Detail, Vendor Information List, Effective Dating Confirmation List	Vendor Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Vendor View	View Organization County Vendor Information	CA State All County Access, Clerical Staff, Clerical Supervisor, Collections Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor, Executive, Help Desk Staff, Marketing Staff, Marketing Supervisor, Oversight Agency Staff, Quality Control Staff, Quality Control Supervisor, System Administrator, View Only.
Vendor Edit	Create and Edit Organization County Vendor Information	Child Care Supervisor, Fiscal Staff, Fiscal Supervisor, RDB Staff, RDB Supervisor, System Administrator

Note: The following Security Rights, Security Group, Right to Group Mapping and Group to Role Mapping are currently existing in CalSAWS.

2.1.6 Page Mapping

Create Page Mapping for the Vendor Information List page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Vendor Information Detail

2.2.1 Overview

Enable the Vendor Information Detail page to allow Users to add or edit Vendor Information for the specific Foster Care Resource that they are viewing.

Information added on the Vendor Information page will then be used for the County Financial Accounting Systems (this does not apply to LA County, since their business process will remain unchanged).

2.2.2 Vendor Information Detail Mockup

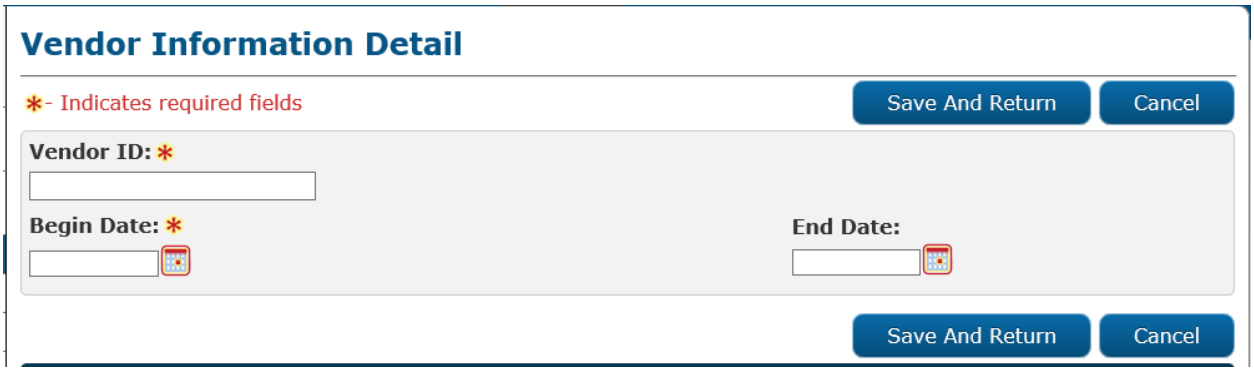

Figure 2.2.1 – Vendor Information Detail page 'Create' mode.

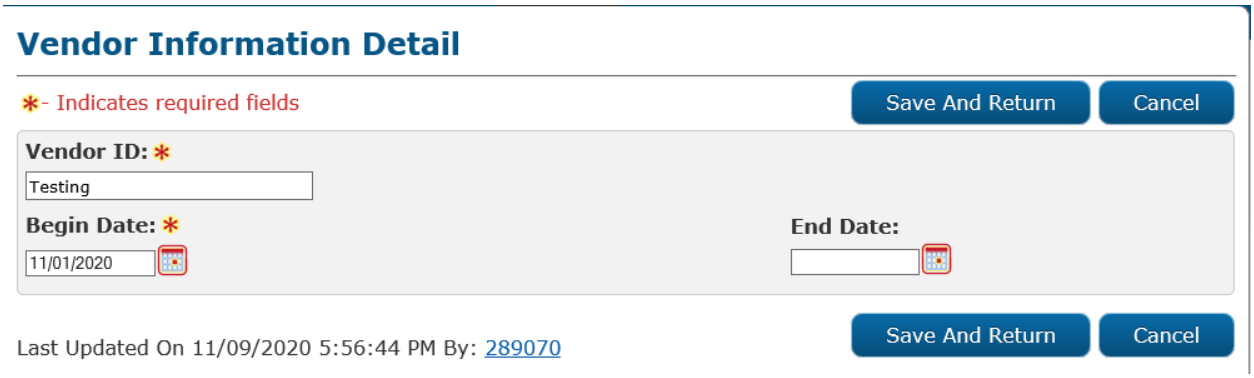

Figure 2.2.2 – Vendor Information Detail page 'Edit' mode.

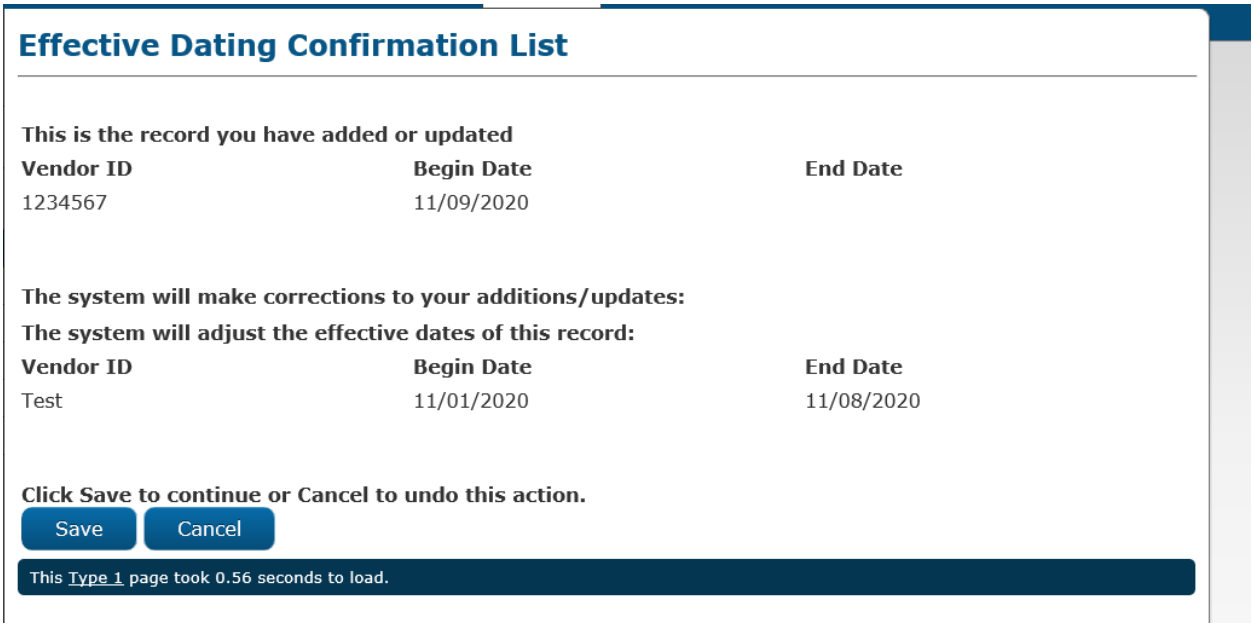

Figure 2.2.3 – Effective Dating Confirmation List

2.2.3 Description of Changes

1. Enable the Vendor Information Detail page for Foster Care Resources in CalSAWS as shown in Figures 2.2.1 and 2.2.2.
    a. The Vendor Information Detail page is accessible to the Users by clicking the 'Add' button or the 'Edit' button from the Vendor Information List page.
    b. The Vendor Information Detail page will display the following fields:
        i. Vendor ID:
            1. This will be an editable text field and will be required.
            2. Value entered on this field will display when the Vendor Information Detail page is open in 'Edit' mode.

3. This field will have a maximum of 50 characters limit. No further characters can be entered once it reached the maximum.

ii. Begin Date:
   1. This will be an editable text field and will be required.
   2. Information entered must be in the following format: MM/DD/YYYY and must be a valid calendar date.
   3. Value entered on this field will display when the Vendor Information Detail page is open in 'Edit' mode.

iii. End Date:
   1. This will be an editable text field.
   2. Information entered must be in the following format: MM/DD/YYYY and must be a valid calendar date.
   3. Value entered on this field will display when the Vendor Information Detail page is open in 'Edit' mode.

c. The Vendor Information Detail page will have a 'Cancel' button.
   i. Any information that was entered or changed on the fields will not be saved upon clicking the 'Cancel' button and User will be redirected to the Vendor Information List page.
   ii. This button will display in 'Create' and 'Edit' mode.

d. The Vendor Information Detail page will have a 'Save And Return' button.
   i. Information entered or changed on the fields will be saved and the User will be redirected to the Vendor Information List page.
   ii. This button will display in 'Create' and 'Edit' mode.
   iii. The 'Effective Dating Confirmation List' page will display after pressing the 'Save And Return' button when an existing record is being altered. Records affected by the effective dating will be saved in the database for historical reporting. The information available on the 'Effective Dating Confirmation List' page will be as follows:
      1. Vendor ID
      2. Begin Date
      3. End Date

Note: The functionality of the Effective Dating Confirmation List page is to adjust the date of an existing record in order to support the addition/modification of the new/updated record. This page will show the details about affected records and will allow the User

to Cancel the update if there is a concern regarding the adjustment.
Records created will utilize continuous effective dating to ensure there are no gaps in the status.
Additionally, if a record is updated and the Effective Dating Confirmation List page is not used due to no overlapping records, the historical information will still be saved in the database for historical reporting.

e. Create a custom validation to display the following message "End Date – End Date must be after Begin Date."
    i. This validation will be display when the worker clicks 'Save And Return' button and the date entered on the 'End Date' field is prior to the date entered on the 'Begin Date' field.

2.2.4 Page Location

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

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
VendorInformationList	Vendor Information List	Vendor View and Vendor Edit
VendorInformationDetailEdit	Vendor Information Detail, Vendor Information List, Effective Dating Confirmation List	Vendor Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Vendor View	View Organization county Vendor Information	CA State All County Access, Clerical Staff, Clerical Supervisor, Collections Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor, Executive, Help Desk Staff, Marketing Staff, Marketing Supervisor, Oversight Agency Staff, Quality Control Staff, Quality Control Supervisor, System Administrator, View Only.
Vendor Edit	Create and Edit Organization county Vendor Information	Child Care Supervisor, Fiscal Staff, Fiscal Supervisor, RDB Staff, RDB Supervisor, System Administrator

Note: The following Security Rights, Security Group, Right to Group Mapping and Group to Role Mapping are currently existing in CalSAWS.

2.2.6 Page Mapping

Create Page Mapping for the Vendor Information Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Automated Regression Test

2.3.1 Overview

Create new automated regression test scripts to verify the basic functional of the Vendor Information List and Detail pages in the context of a Foster Care resource.

Create new automated regression test scripts to verify the existence of a page mapping for each applicable field on these two pages.

2.3.2 Description of Changes

1. Create a new automated script to verify the following Vendor Information Detail transactions, and associated display on the Vendor Information List page:
    a. Create
    b. Edit
    c. View
    d. Cancel (in create or edit mode)
2. Create a new automated script to verify the Page Mappings for the Vendor Information List page

    Note: This is a purely regression test / "no change" scenario.
3. Create a new automated script to verify the Page Mappings for the Vendor Information Detail page

    Note: This is a purely regression test / "no change" scenario.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.0	Online	Security Matrix	CA-219536 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.239	The LRS shall allow COUNTY-specified Users to collect Vendor information in order to facilitate the issuance of payments to Vendors on behalf of the applicant/participant when appropriate.	The Vendor Information List and Vendor Information Detail page are being enabled in the CalSAWS system. This will allow users to view/add/edit Vendor Information for the specific Foster Care Resource they are viewing.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219658

Update the Foster Care Facility – GH and FFA Report with New CCR Logic

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/14/2020	1.0	Initial Revision	Esequiel Herrera-Ortiz

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1 OVERVIEW

The Continuum of Care Reform (CCR) was implemented in CalSAWS and C-IV through a series of SCR's starting in 2016. To comply with CCR policy changes, updates were made for Foster Care (FC), Kin-GAP (KG), and the Adoption Assistance Program (AAP) in both systems in areas of online data collection, EDBC, the FC Resource Databank, fiscal processes, reports, the DCFS FC Inbound Reader Interface, and Client Correspondence.

With CA-200366 Migration SCR for CCR, the CalSAWS system will be updated to resolve design differences between the CCR implementation between C-IV and CalSAWS.

The Foster Care Facility – GH and FFA Report is an existing report used by DCFS to reconcile all issuances related to Group Homes and Foster Family Agencies in CalSAWS. This SCR will outline the changes that will be made to the report to function with the new FC Ratio data model as well as to include the new Foster Family Agency placement type.

1.1 Current Design

Previously in CalSAWS all Foster Family Agency (FFA) resources had a single Foster Care Facility Ratio per age group. This information was stored in the code detail table. The Foster Care Facility – GH and FFA Report is currently obtaining the FC Ratios from the codes table. With CA-200366 the data model will be updated to allow county workers to update the FC Ratios through the system.

The Foster Care Facility – GH and FFA Report does not include the Foster Family Agency placement resource which was discontinued in CalSAWS but will be re enabled with CA-200366.

1.2 Requests

Update the Foster Care Facility – GH and FFA Report to work with the new FC Ratio data model and to include the Foster Family Agency (FFA) placement type.

1.3 Overview of Recommendations

Update the Foster Care Facility – GH and FFA Report as follows:

1. Update the 'FFA Summary' and 'FFA Detail' sheet to obtain the FFA ratios from the new data model.
2. Update the 'FFA Summary' and 'FFA Detail' sheet to include the new Foster Family Agency placement type.

1.4 Assumptions

1. This SCR will be introduced at the same time as CA-200366 Migration SCR for CCR.
2. There will be no updates made to the report template

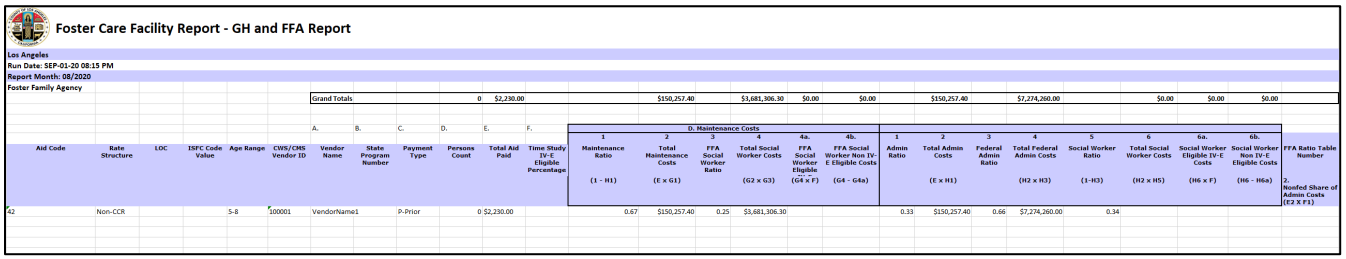
2 RECOMMENDATIONS

2.1 Foster Care Facility - GH and FFA Report

2.1.1 Overview

The Foster Care Facility – GH and FFA Report provides detailed information to support facility information to the state. The report covers both Group Homes and Foster Family Agencies where an issuance has been claimed for the facility and where there are known maintenance/admin ratios for the facility. The report will be updated to include the new 'Foster Family Agency' placement type as well as to support the new data model for Foster Care Ratios.

2.1.2 Foster Care Facility – GH and FFA Report Screenshot



Foster Care Facility Report - GH and FFA Report

Los Angeles
Run Date: SEP-01-20 08:15 PM
Report Month: 08/2020
Foster Family Agency

| | | |

AT	Foster Family Agency (Treatment)
AG	Foster Family Agency
RN	Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
RT	Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)
MD	Multidimensional

2.1.4 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: Fiscal**

2.1.5 Counties Impacted

All CalSAWS counties will be impacted by the changes outlined in this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
N/A			

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.1	LRS shall produce reports daily, weekly, monthly, quarterly, semi-annually, annually, and as needed, as specified by COUNTY.	The report satisfies a need to generate a report to assist in reconciling issuances for Group Home and FFA expenditures.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
N/A			

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220156

Updates to Handle Converted Legacy TCF Programs Phase 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gillian Noelle Bendicio
	Reviewed By	Michael Wu, Long Nguyen, Christine Altavilla, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/30/2020	1	Initial Revision	Gillian Noelle Bendicio

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2.1.6 Page Mapping 7
2.1.7 Page Usage/Data Volume Impacts 7
2.2 [Automated Regression Test] ..... **Error! Bookmark not defined.**
2.2.1 Overview ..... **Error! Bookmark not defined.**
2.2.2 Description of Change ..... **Error! Bookmark not defined.**
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4.2 Migration Requirements 10
5 Migration Impacts 11

1 OVERVIEW

This System Change Request (SCR) is the phase 1 of updating the CalSAWS to handle the Legacy Transitional CalFresh (TCF) programs that are migrated over from the C-IV system. Additional analysis is needed to check other functionalities that are impacted by the Legacy TCF cases. The additional updates documented by the analysis will be implemented in future efforts.

1.1 Current Design

When a system case that has both CalWORKs (CW) and CalFresh (CF) programs becomes ineligible for ~~CF~~ CW, ~~but still eligible for CW~~ ~~CW,~~ they will be eligible for TCF for 5 months. The CalSAWS will give the case a TCF aid code and add a Transitional sub-program code tied to their CF program detail record. Currently, CalSAWS does not have Legacy TCF cases which influenced the implementation of enhancements and fixes in the system.

1.2 Requests

In the C-IV system, the original implementation of TCF is a separate program from CF with the same program code. Since the CalSAWS did not have this implementation, the system will need to be updated whenever a single CF program is expected in the logic.

1.3 Overview of Recommendations

~~1.3~~ The phase 1 of updating the CalSAWS to handle cases with Legacy TCF programs includes:

1. Update the Case Summary page to handle both the Legacy TCF and CF program blocks.

1.4 Assumptions

1. Existing functionalities not mentioned in this document will retain its current functionality.
2. ~~1.~~ The phase 2 of this effort will be implemented by CA-221625 Updates to Handle Converted Legacy TCF Programs Phase 2.

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Commented [GB1]: Add the future SCR here

2 RECOMMENDATIONS

2.1 Case Summary

2.1.1 Overview

The Case Summary page contains functionality that informs the user that the program is terminating in a future month with a message and switching to an alternate program header. This functionality will be updated to not check for Legacy TCF programs since they are already closed.

2.1.2 Case Summary Mockup

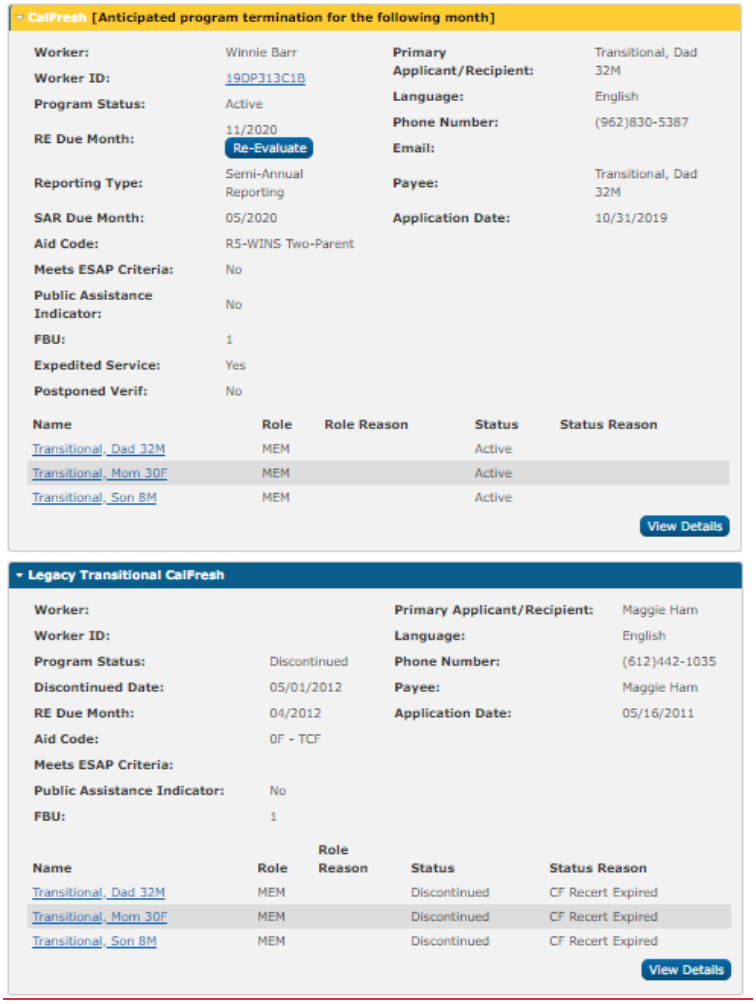

Figure 2.1.1 – Legacy TCF program block and a CF program with future termination (Note: Legacy TCF block is collapsed by default)

~~2.1.2~~2.1.3 Description of Changes

1. Update the logic that retrieves program information that checks for any future terminations to not include Legacy TCF programs.

~~2.1.3~~2.1.4 Page Location

- **Global: Case Info, Eligibility, Child Care**
- **Local: Case Summary**
- **Task: Case Summary**

~~2.1.4~~2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

~~2.1.5~~2.1.6 Page Mapping

No impact to this section.

~~2.1.6~~2.1.7 Page Usage/Data Volume Impacts

No impact to this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.13.1.1	The LRS shall establish Redetermination, Recertification, and/or Annual Agreement periods.	The SCR is updating the functionality that checks a benefit program's termination based on the RE date to accommodate Legacy TCF programs.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220250 | DDID 2190

Update ICT Case Linking functionality from ICT Reader job

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/20/2020	.01	Initial Draft	Howard Suksanti
11/25/2020	.02	Added section 1.2 based on the review comments	Howard Suksanti

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1 OVERVIEW

The existing electronic intercounty transfer (e-ICT) inbound reader job includes functionality to auto-link an e-ICT to a case when the sending case number matches the case number that was initiated by the worker.

With migration of all 58 counties to CalSAWS, the e-ICT inbound reader job will no longer need to run.

This SCR will move the auto case linking functionality from the existing e-ICT Inbound reader job to a new batch job so that this functionality will remain after turning off the e-ICT inbound reader at migration.

1.1 Current Design

The following are the overview of steps when an e-ICT is auto linked by the e-ICT inbound reader job.

1. When an e-ICT is requested by Los Angeles County, a worker creates a case in Los Angeles County and then sends an e-ICT request to the other County.
2. The Worker adds the Other County Case Number field on the ICT Detail page since the field is a required field.
3. The sending County receives the e-ICT request. The sending County sends the requested case to Los Angeles County.
4. The e-ICT Inbound reader job process the incoming case. If the sending case number matches the Other County Case Number field on the ICT Detail page, the job will auto link the e-ICT with the case.

1.2 Requests

1. Move the case-linking functionality from the ICT Reader job to a new ICT job.

1.3 Overview of Recommendations

1. Add a new batch job that will auto-link an e-ICT to a case when the sending case number matches the case number that was initiated by the worker.

1.4 Assumptions

1. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted into the batch job.
2. The scheduling SCRs mentioned above will cover the opt in/out functionality and can be verified once implemented.
3. The existing e-ICT Inbound reader job will be turned off when all 58 counties migrate to CalSAWS. The new job added with this SCR will be scheduled once C-IV Counties migrate to CalSAWS.

2 RECOMMENDATIONS

This SCR will create a new batch job that will auto-link an e-ICT record to a case when the sending case number matches the case number that was initiated by a worker.

2.1 New Batch Job to auto-link an e-ICT to a Case

2.1.1 Overview

Create a new batch job that will auto-link an e-ICT record to a case when the sending case number matches the case number that was initiated by a worker.

2.1.2 Description of Change

1. Create a new batch job that will auto-link an e-ICT record to a case when the sending case number matches the case number that was initiated by the worker. The job will insert an e-ICT status of 'In Process' as of the batch run date.

   The job will auto-link an e-ICT record to a case when all of the following are true.

   a. The latest e-ICT status is in Received between the last success date and batch run date.
   b. The sending case number matches the Other County Case Number field on the ICT Detail page.
   c. The e-ICT is requested by the e-ICT receiving County.
   d. The receiving County is from the batch County Code properties. (Currently only Los Angeles County.)
   e. The sending County has a Code Category 15 – refer table 41 value of 'LD' which mean the county is migrated into CalSAWS.

2.1.3 Execution Frequency

Daily (Mon-Sat) except holidays.

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

Los Angeles County. The job will be a County '00' job with the County Code List parameter of '19-Los Angeles'.

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2190	The CONTRACTOR shall update the e-ICT functionality to account for an intra-consortium e-ICT process as all 58 Counties will now be on the CalSAWS Software.	"• There will be a single database for all 58 CalSAWS Counties. • LA County will retain their county-specific functionality for the eICT pages and interfaces (including but not limited to ""Assignment by Office""). • Imaging related changes associated to eICT will be managed by implementation of the Imaging Functional Design Session requirements. • The inter-consortia ICT interface will be discontinued at the end of the last conversion wave."	This SCR will create a batch job that will link an e-ICT to a case when the sending case number matched the case number that was initiated by the worker.