

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-48348

Extension of Time-Period for Dropping the
Worker on Discontinued Eligibility Programs

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

Through the Staff Detail page, Staff can be end-dated from a Position even though there are programs that are still assigned to the Position. As a result, those programs will no longer be assigned to a Worker and Worker ID information will no longer display on the Case Summary page. CalSAWS will be updated so that Staff assignment cannot be end-dated if there are programs still assigned to the Position and also to continue to display the Worker and Worker ID information.

The Workload Inventory pages allow users to view an inventory of programs assigned to an office position and they will be updated to allow users to be able to filter by program status. The Eligibility Workload Inventory Export report will also be updated to accept new status parameter selection.

The Position Detail page displays information regarding the Position. This includes the ability to set the maximum number of cases that can be assigned to the position and also determine the amount of current case load and total percentage of cases assigned to the position. The logic used in calculating the current case load and total percentage of cases assigned to the position will be updated to disregard programs that are in denied, discontinued or deregistered status.

The Workload Reassignment Detail page allows users to assign/reassign programs to a position. The current logic used in determining program assignment/reassignment to a position does not take into consideration the status of the program. This logic will be updated to disregard programs with denied, discontinued or deregistered status in determining current case load.

Lastly, the Life Cycle Reassignment batch job runs daily to remove worker assignments for programs that have been closed (i.e. discontinued, denied). CalSAWS will update the batch job in order to support all 58 counties for when the worker assignment from the program will be removed based on County and Program.

1.1 Current Design

In CalSAWS users are able to end-date a staff assignment even though there are programs that are still assigned to the position. As a result, those programs are no longer assigned to a Worker and Worker ID information does not display on the Case Summary page.

Through the Workload Inventory pages (Eligibility Workload Inventory, Employment Services Workload Inventory and the Child Care Workload Inventory) users are able to determine the number of programs assigned to a position. However, they do not have the option to filter by the status of the program.

The logic that determines program assignment/reassignment to a position does not take into consideration the status of the program when assigning the case load to the worker. As such, a position might not be able to be assigned additional programs once the Maximum Case load amount has been reached. Secondly, the amount of Current Case Load and Total Percentage of Cases Assigned to a position that is displayed on the Position Detail page does not take into consideration the status of the programs that are assigned to the Position.

Lastly, the Life Cycle Reassignment batch job (PB00M100) runs daily and removes the worker assignment from a program. The batch job will behave differently based on the type of program and the closure status (i.e., discontinued, denied). However, the existing Life Cycle Reassignment batch job is not configurable by County.

1.2 Requests

1. Update the Staff Assignment Detail page to prevent users from end-dating a staff assignment from a position when there are programs still assigned to it.
2. Update the Case Summary page to display the position information even when there's no staff assigned to the position.
3. Add a filter to the following pages that will allow users to only display results based on the Status of the Program: the Eligibility Workload Inventory, Employment Services Workload Inventory and the Child Care Workload Inventory pages.
4. Update the logic used in assigning/reassigning programs to a position to disregard programs that are in denied, discontinued, deregistered status.
5. Update the Life Cycle Reassignment batch job to be configurable based on County and program information upon determining when a worker assignment will be removed.

1.3 Overview of Recommendations

1. Create a validation on the Staff Assignment Detail page to prevent Staff from being end-dated when there are programs that are still assigned to the Position.
2. Update the Case Summary page to display the Worker ID information when there is no Staff assigned to the Position and to display 'No Staff Assigned' when there is no Staff assigned to the Position.
3. Add a new Program Status filter to the Eligibility Workload Inventory, Employment Services Workload Inventory and Child Care Workload Inventory pages.
4. Update the Eligibility Workload Inventory Export report to accept new status parameter.
5. Update the logic used on the Current Case Load field and Total Percentage of Cases Assigned field on the Position Detail page to disregard cases where the programs assigned to the position that are in denied, discontinued or deregistered status.
6. Update the logic used in assigning/reassigning programs to a position to disregard programs that are in denied, discontinued, deregistered status when determining the current case load that a position have.
7. Update the Life Cycle Reassignment batch job (PB00M100) to include County information in determining when to update the worker assignments for a program.

1.4 Assumptions

1. All existing functionality will remain unchanged unless called out as part of this SCR.

2 RECOMMENDATIONS

Prevent users from end-dating a Staff assignment to a Position when there are programs that are still assigned to the position and continue to display Position information on the Case Summary page when there's no Staff assigned to the Position. The following pages will be updated to include a Program Status filter: Eligibility Workload Inventory, Employment Services Workload Inventory and Child Care Workload Inventory and the Eligibility Workload Inventory Export report will be updated to accept new status parameter.

The logic used to determine current case load in determining programs assignment/reassignment to a position will be updated to disregard programs with status of denied, discontinued or deregistered. This include updating the logic used on the Current Case Load field and Total Percentage of Cases Assigned field on the Position Detail page.

Lastly, the Life Cycle Reassignment batch job (PB00M100) will be updated to also include County information in determine when the worker assignments for a program will be dropped when the program has been closed (i.e. discontinued, denied, etc.).

2.1 Staff Assignment Detail

2.1.1 Overview

The Staff Assignment Detail page allows users to add new staff and update existing staff information. Users are able to end-date a Staff Assignment to a Position through the Staff Assignment Detail page even though there are still programs assigned to the Position. This SCR will add a new validation message to the Staff Assignment Detail page when the Staff Assignment is being end-dated even though there is a program that is still assigned to the worker.

2.1.2 Staff Assignment Detail Mockup

The screenshot shows a web form titled "Staff Assignment Detail". At the top right, there are two buttons: "Save and Return" and "Cancel". Below the buttons, a red error message is displayed: "• **End Date** - The End Date cannot be set due to current program assignments for this worker." Below the message is a grey box containing the following information:

- Worker Identification:**
19LS90900R - Sec 00 - Eligibility Worker
- Staff Name:**
Dan Tester
- Begin Date:**
09/23/2019
- End Date:**
[Empty text input field] [Calendar icon]

At the bottom right of the form, there are two more buttons: "Save and Return" and "Cancel".

Figure 2.1.1 – Staff Assignment Detail

2.1.3 Description of Changes

1. Update the Staff Assignment Detail page to display a new custom validation.
 - a. Validation will display when the user attempts to save the record (by clicking the 'Save and Return' button) when there are programs still assigned to the position and there's a date (current date or a date in the future) entered on the 'End Date' field.
 - b. Custom validation will display the following message: 'End Date – The End Date cannot be set due to current program assignments for this worker.'

2.1.4 Page Location

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

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 Case Summary

2.2.1 Overview

The Case Summary page allows users to view a summary of the programs on the selected case. This include Worker and Worker ID information assigned to the programs. When a Staff assignment has been end-dated from a Position, the Worker and Worker ID information no longer display on the Case Summary page for the program that was assigned to that Position. This SCR will update the Case Summary page to always display the Worker ID information even if there is no Staff assigned to the Position and also display the Worker as No Staff Assigned.

2.2.2 Case Summary Mockup

Case Summary

Case Name Case Name	County Los Angeles	7
--	-----------------------	---

Companion Cases

Case Number	Case Name
Add	

Display: [View](#)

Case Flags

Child Care

CalWORKs

Worker:	No Staff Assigned	Primary Applicant/Recipient:	TEST, JOSEPHINA 35F
Worker ID:	19DP344W16	Language:	English
Program Status:	Active	Phone Number:	(507)946-2663
RE Due Month:	01/2021 Re-Evaluate	Email:	johndoe@calsaws.org
Reporting Type:	Semi-Annual Reporting	Payee:	TEST, JOSEPHINA 35F
SAR Due Month:	07/2020	Application Date:	01/29/2020
Aid Code:	30 - CW-All Other Families (Fed)		
Public Assistance Indicator:			
FBU:	1		

Name	Deprivation	Role	Role Reason	Status	Status Reason
TEST, JOSEPHINA 35F		MEM		Active	
TEST, RANDELL 14M	Absence	MEM		Active	

[View WPR](#) [View Details](#)

CalFresh

Worker:	John Carry	Primary Applicant/Recipient:	TEST, JOSEPHINA 35F
Worker ID:	19DP344W13	Language:	English
Program Status:	Discontinued	Phone Number:	(507)946-2663
Discontinued Date:	10/01/2020	Email:	johndoe@calsaws.org
RE Due Month:	11/2020	Payee:	TEST, JOSEPHINA 35F
Aid Code:	0F - TCF	Application Date:	01/29/2020
Meets ESAP Criteria:			
Public Assistance Indicator:	No		
FBU:	1		

Name	Role	Role Reason	Status	Status Reason
TEST, JOSEPHINA 35F	MEM		Discontinued	Gets CalWORKs
TEST, RANDELL 14M	MEM		Discontinued	Gets CalWORKs

[View Details](#)

Figure 2.2.1 – Case Summary

2.2.3 Description of Changes

1. Update the Case Summary page to always display the Worker ID information that is assigned to the Program even when there is no Staff assigned to the Position.

- a. This change will apply for all programs .
2. Update the Case Summary page to display 'No Staff Assigned' under the 'Worker' field when there is no Staff assigned to the Position.
 - a. This change will apply for all programs .

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Eligibility Workload Inventory

2.3.1 Overview

The Eligibility Workload Inventory page allows users to view programs assigned to an office position. Currently, users do not have an option to filter the status of the program that they would like to view. This SCR will create a new Program Status Filter, that will allow the worker the option to filter by Program Status.

2.3.2 Eligibility Workload Mockup

Eligibility Workload Inventory

*- Indicates required fields

Worker ID: 19DP344W16 Select	Assignment Type: Primary ▼	Display Workload: * 11/04/2020 📅
Status Effective Date: * 11/04/2020 📅	Status: All ▼	

Results per Page: 100 View

Search Results Summary Results 1 - 100 of 1327

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) Next 📄

Total Assignments

Cases	576
Programs	1327

Case Number	Primary	Program	Status	Application Date	Auth Date	RE Date	CFS
📄 L567128	JANE, EDDA 40F	CW	Active	01/06/2020	09/05/2020	12/2020	📄
📄 L567128	JANE, EDDA 40F	MC	Active	01/06/2020	06/11/2020	12/2020	📄

Figure 2.3.1 – Eligibility Workload Inventory

2.3.3 Description of Changes

1. Add a new dropdown field titled 'Status:' to the Eligibility Workload Inventory page as shown on Figure 2.3.1.
 - a. The 'Status:' dropdown field will allow users to filter which program status they would like to view and have it display under the Search Results Summary section accordingly.
 - b. The 'Status:' dropdown field will have the following options and will default to 'All':
 - i. All
 1. All Programs statuses will display under the Search Result Summary section.
 - ii. Active
 1. Only Programs with 'Active' status will display under the Search Result Summary section.
 - iii. Denied
 1. Only Programs with 'Denied' status will display under the Search Result Summary section.
 - iv. Discontinued
 1. Only Programs with 'Discontinued' status will display under the Search Result Summary section.
 - v. Ineligible

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1. Only Programs with 'Ineligible' status will display under the Search Result Summary section.
- vi. Pending
 1. Only Programs with 'Pending' status will display under the Search Result Summary section.

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Employment Services Workload Inventory

2.4.1 Overview

The Employment Workload Inventory allows users to view all programs assigned to an office position. Currently, users do not have an option to filter by the status of the program that they would like to view. This SCR will create a new Program Status Filter, that will allow users the option to filter by Program Status.

2.4.2 Employment Services Workload Inventory Mockup

Employment Services Workload Inventory

Worker ID: 90LS005N00 **Display Workload: *** 11/04/2020 **Status Effective Date: *** 12/01/2020 **Program Status:** All

Total Assignments	
Cases	0
Program	0

Case Number	Name	Program	Program Status	Program Status Reason	Program Review Date	Activity	Activity Review Date	Benefit Program Status
No Data Found								

Figure 2.4.1 – Employment Services Workload Inventory

2.4.3 Description of Changes

1. Add a new dropdown field titled 'Program Status:' to the Employment Workload Inventory page as shown on Figure 2.4.1.
 - a. The 'Program Status:' dropdown field will allow users to filter which program status they would like to view and have it display under the Search Results Summary section accordingly.
 - b. The 'Program Status:' dropdown field will have the following options and will default to 'All':
 - i. All
 1. This will display all Programs statuses on the 'Program Status' column under the Search Result Summary section.
 - ii. Active
 1. This option will only display Programs with 'Active' status on the 'Program Status' column under the Search Result Summary section
 - iii. Deferred
 1. This option will display Programs that have 'Deferred' status on the 'Status' column under the 'Search Result Summary section.
 - iv. Denied
 1. This option will display Programs that have 'Denied' status on the 'Status' column under the 'Search Result Summary section.
 - v. Deregistered
 1. This option will display Programs that have 'Deregistered' status on the 'Status' column under the 'Search Result Summary section.

- vi. Discontinued
 1. This option will display Programs that have 'Discontinued' status on the 'Status' column under the 'Search Result Summary' section.
 - vii. Exempt
 1. This option will display Programs that have 'Exempt' status on the 'Status' column under the 'Search Result Summary' section.
 - viii. Good Cause
 1. This option will display Programs that have 'Good Cause' status on the 'Status' column under the 'Search Result Summary' section.
 - ix. Non-Comp
 1. This option will display Programs that have 'Non-Comp' status on the 'Status' column under the 'Search Result Summary' section.
 - x. Pending
 1. This option will only display Programs that have 'Pending' status on the 'Program Status' column under the Search Result Summary section.
 - xi. Sanction
 1. This option will display Programs that have 'Sanction' status on the 'Status' column under the 'Search Result Summary' section.
2. Relabel the 'Go' button to 'View'.

2.4.4 Page Location

- **Global: Empl. Services**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Child Care Workload Inventory

2.5.1 Overview

The Child Care Workload Inventory allows users to view programs assigned to an office position. Currently, users do not have an option to filter by the status of the program that they would like to view. This SCR will create a new Program Status Filter, that will allow users the option to filter by Program Status.

2.5.2 Child Care Workload Mockup

The mockup displays the 'Child Care Workload Inventory' interface. At the top, there are search filters: 'Worker ID' (90LS005N00 with a 'Select' button), 'Display Workload:' (11/04/2020 with a calendar icon), 'Status Effective Date:' (12/01/2020 with a calendar icon), and 'Status:' (All dropdown). A 'View' button is located to the right of the filters. Below the filters is a 'Total Assignments' section with a table:

Total Assignments	
Cases	0
Programs	0

Below this is a table with columns: Case Number, Primary, Sub-Program, Status, Application Date, and Re-Evaluation Date. The table content is 'No Data Found'. At the bottom, a status bar indicates 'This Type_1 page took 0.32 seconds to load.'

Figure 2.5.1 – Child Care Workload Inventory

2.5.3 Description of Changes

1. Add a new dropdown field titled 'Status:' to the Child Care Workload Inventory page as shown on Figure 2.5.1.
 - a. The 'Status:' dropdown field will allow users to filter which program status they would like to view and have it display under the Search Results Summary section accordingly.
 - b. The 'Status:' dropdown field will have the following options and will default to 'All':
 - i. All
 1. All Programs statuses will display under the Search Result Summary section.
 - ii. Active
 1. Only Programs with 'Active' status will display under the Search Result Summary section.
 - iii. Denied

1. Only Programs with 'Denied' status will display under the Search Result Summary section.
- iv. Discontinued
 1. Only Programs with 'Discontinued' status will display under the Search Result Summary section.
- v. Pending
 1. Only Programs with 'Pending' status will display under the Search Result Summary section.
2. Relabel the 'GO' button to 'View'.

2.5.4 Page Location

- **Global: Child Care**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Position Detail

2.6.1 Overview

The Position Detail page is used to display information regarding the position. Within the page, it displays information such as Office information, programs assigned, tasks, etc. Additionally, users are able to set the maximum amount of case to be assigned to the position and determine the amount of current case load and the total percentage of cases assigned to the position. Currently, the logic used to display the amount of Current Case Load and Total Percentage of Cases Assigned does not consider the status of the programs assigned to the position. This SCR will update the logic used on the Current Case Load and Total Percentage of Cases Assigned fields to disregard programs that are in denied, discontinued or deregistered status.

2.6.2 Position Detail Screenshot

Position Detail

* - Indicates required fields

Edit Copy Close

General Position Information

Worker ID: 19DP344W16			
Office Name: * 034 Lancaster		Section: * 5Q	
Unit ID: * 4W 00		Position Status: * Active	
Assignment Type Code: Continuing		Worker Level: Eligibility Worker	
Auto Assign Indicator: No		Max Case Load: 600	
SSI Referrals: No		Max Intake Case Load:	
Authorization Sampling Percentage: 15		Current Case Load: 592	
Case Load: Traditional		Total Percentage of Cases Assigned: 98%	
IHSS Referrals Auto Assignment: * No			

Figure 2.6.1 – Position Detail Screenshot – Reference only.

2.6.3 Description of Changes

1. Update the logic used on the 'Current Case Load' field to disregard cases where the program assigned to the position is in denied, discontinued or deregistered status.
2. Update the logic used on the 'Total Percentage of Cases Assigned' to disregard cases where the program assigned to the position is in denied, discontinued or deregistered status.

2.6.4 Page Location

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

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update Page Mapping for the Current Case Load field and Total Percentage of Cases Assigned field.

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Workload Reassignment Detail

2.7.1 Overview

The Workload Reassignment Detail page allows users to assign/reassign programs to a position. The current logic used to determine the current case load in determining the program assignment/reassignment to a position does not take into consideration the status of the program. This SCR will update the logic used in assigning/reassigning programs to a position to disregard programs with denied, discontinued or deregistered status when determining current case load.

2.7.2 Workload Reassignment Detail Screen Shot

Workload Reassignment Detail

*- Indicates required fields Reassign

Unconfirmed Assignments: [0](#)

From:

- Worker ID: Select
- Case Number: Select
- From Any Eligible Position Office: CalSAWS Project Office Select

Reassign Quantity:

- Number of Cases:
- Entire Workload

Program: * - Select - Language: * Any

Case Flag: - Select - Status: - Select -

To:

- Worker ID: Select
- Unit Office: Select Unit: - Select -
- Auto Assign to Eligible Positions Office: CalSAWS Project Office Select Remove
- Auto Assign to Eligible Position in County

Effective Date:

- Effective Date:
- Immediate Assignment

Reassignment Option

Automatically Reassign When Activated: * - Select -

Print New Worker Letter

Reassign

This [Type 1](#) page took 2.09 seconds to load.

Figure 2.7.1 – Workload Reassignment Detail Screenshot – Reference only

2.7.3 Description of Changes

1. Update the logic used to determine program assignment/ reassignment (either done through the Workload Reassignment Detail page or through the overnight batch job) to disregard cases where the program assigned to the position is in denied, discontinued or deregistered status when determining current case load.

2.7.4 Page Location

- **Global: Admin Tools**
- **Local: Workload Assignment**
- **Task: Workload Reassignment**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 Batch Regression Test

2.8.1 Overview

The LifeCycleReassignment3 (PB00M102) and Update Assignments (PB00M103) modules utilize the same method that determines a worker's case load. The logic currently does not filter a program's status when determining a worker's current case load.

Section 2.7.3 describes the logic update to disregard cases where the program assigned to the position is in Denied, Discontinued or Deregistered status when determining current case load.

2.8.2 Description of Changes

1. Perform a regression test for PB00M102 and PB00M103 and validate that both batch jobs are excluding programs with a Discontinued,

Denied, and/or Deregistered status when determining a worker's current case load.

2.8.3 Execution Frequency

No Change. This batch job runs daily during county business days (Monday – Saturday) excluding Sundays and holidays.

2.8.4 Key Scheduling Dependencies

No Change.

2.8.5 Counties Impacted

All Counties.

2.8.6 Data Volume/Performance

No change.

2.8.7 Failure Procedure/Operational Instructions

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

2.9 Update the Life Cycle Reassignment Batch Job

2.9.1 Overview

The Life Cycle Reassignment Batch job (PB00M100) automatically end-dates program assignments with a status of Denied, Discontinued, Deregistered and Sanctioned.

The table below maps the current functionality between C-IV and CalSAWS. The batch logic will end-date a worker assignment based on the following program and program status parameters:

Table 2.9.1 – Current End Worker Assignment Logic

System	Program	Program Status	End Worker Assignment on...
C-IV	All programs	Discontinued, Denied, Deregistered	Same day of program status effective date
CalSAWS	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	Same day of program status effective date
CalSAWS	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	30 th day after the Discontinued/Deregistered effective begin date
CalSAWS	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	31 st day after the Denial action date
CalSAWS	Medi-Cal	Discontinued	90 th day after the Discontinued effective begin date
CalSAWS	WTW/REP	Sanction	Same day of program status effective date

Note: If the End Assignment date falls on a Sunday or holiday, the batch job will run on the next business day.

This section outlines the updates necessary to allow removing a worker assignment to be configurable:

- Update PB00M100 logic to derive the appropriate worker end date based on a configuration table.
- Create a new configuration table to inform the batch job logic per County, Program, and status combination.

2.9.2 Description of Change

1. Update the end worker assignment driving query to derive the appropriate worker assignment end date based on the new configuration table described in section 2.9.2.2. The lookup functionality will derive the worker assignment end date for all programs that have a “Closed” status (Denied, Discontinued, Deregistered, and Sanctioned) as of the Batch Date where the closed program is still assigned to a Worker.

Los Angeles County and C-IV counties will continue to use current functionality when removing a worker assignment. The current rules are displayed below.

Table 2.9.2.1 – End Worker Assignment Logic Reference

Migration County	Program	Program Status	Rules
57 Migration Counties	All	Discontinued, Denied, Deregistered	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See <i>example #5 below</i> .
Los Angeles	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	Immediately end-date worker assignment based on the begin date (effective date) of the program status.
Alpine, Butte, Calaveras, Colusa, El Dorado, Fresno, Humboldt, Los Angeles, Marin, Mendocino, Merced, Nevada, San Joaquin, Orange, Placer, San Diego, Solano, Sonoma, Stanislaus, Tuolumne Note: The list of counties above are the counties who opted into the functionality per DDID 85.	WTW, REP	Sanctioned	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See <i>example #3 below</i> .
Los Angeles	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	End-date worker assignment after 1 full month (30 days) of the Program status. Note: If a program is closed effective in the middle of the month, then the worker will remain assigned for the remainder of the current month throughout the following month. The worker assignment will be end-dated when the job runs for the first time after the following month. See <i>example #4 below</i> .

Migration County	Program	Program Status	Rules
Los Angeles	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	End-date worker assignment 31 days after the Denial creation/action date. See <i>example #2 below</i> .
Los Angeles	Medi-Cal	Discontinued	End-date worker assignment 90 days after the Discontinuance Begin date. See <i>example #1 below</i> .

Example 1: Sarah from County 19 is assigned to a Medi-Cal program that was Discontinued on April 1st, 2021. Based on the lookup table, batch will determine the worker assignment end date based on County, program and program status. The worker assignment will be removed 90 days from the status begin date. The worker assignment end date will be July 1st, 2021.

Example 2: John from County 19 is assigned to a CalWORKs program that was Denied on March 1st, 2021. Batch will remove the worker assignment 31 days after the denial action date. The worker assignment end date will be April 1st, 2021.

Example 3: Amanda from County 19 is assigned to a Refugee Employment Program (REP) that was Sanctioned on June 1st, 2021. Batch will remove the worker assignment the same day as the status begin date. The worker assignment end date will be June 1st, 2021.

Example 4: Bob from County 19 is assigned to a Child Care program that was Discontinued on June 16, 2021. Batch will remove the worker assignment 30 days (1 full month) from the status begin date. Program is closed in the middle of the month of June, so the worker will remain assigned for the remainder of June and throughout all of July. The worker assignment end date will be August 2nd, 2021 (*August 1st falls on a Sunday*).

Example 5: Keith from County 24 is assigned to a CalFresh program that was Denied on June 3rd, 2021. Batch will remove the worker assignment the same day as the status begin date. The worker assignment end date will be June 3rd, 2021.

2. Create a new table to store county configurations for end-dating a worker assignment. The table will include the following attributes:

Attribute	Description
Program Code	This column is associated to the Program assigned to a Worker
Status Code	This column is associated to the status of the program assigned
County Code	This column identifies the County to which the Case belongs
Calculation Type	This column describes the calculated elapsed time type. Examples: Elapsed Days, Elapsed Months, etc.
Value	This column identifies the number of elapsed days or months from which to determine the end worker assignment date
Compare Date	This column identifies the date from when to begin calculating the worker assignment end date

- a. Refer to [Supporting Document 1](#) for Drop Worker Logic Lookup table.

2.9.3 Execution Frequency

No Change. This batch job runs daily during county business days (Monday – Saturday) excluding Sundays and holidays.

2.9.4 Key Scheduling Dependencies

No Change.

2.9.5 Counties Impacted

All Counties.

2.9.6 Data Volume/Performance

The anticipated average number of records processed is between 15,000 – 20,000 per day. Please note that this is an approximation and the number of records may vary.

2.9.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file

from the directory and contacting the external partner if there is an account or password issue, etc...)

2.10 Eligibility Workload Inventory Export

2.10.1 Overview

The Eligibility Workload Inventory Export report is executed by an on-demand selection by a user on the worker performing enquiries of Workload Inventory. The worker can make multiple and various on-line enquires, then when needed, can export the result of that enquiry.

The update with SCR CA-48348 is to make status options available to select and report the selected status type. Currently, the report export logic is defaulted to "All" and is to be updated to accept the parameter option selected by the worker.

2.10.2 Eligibility Workload Inventory Export Sample

Case Number	Primary Applicant	Program	Status	Application Date	Authorization Date	RE Due Date	Incomplete DERs	Carry Forward Status (CFS)

Figure 2.2.1 – Eligibility Workload Inventory Export Sample

2.10.3 Description of Change

1. Update report logic to accept new status parameter selection. As defined in Section 2.5.3, the selection will be one of the below options:
 - b. All
 - c. Active
 - d. Denied
 - e. Discontinued
 - f. Ineligible
 - g. Pending

Note: No change to the actual report is required

2.10.4 Report Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

2.10.5 Counties Impacted

The update will be available to all counties.

2.11 Automated Regression Test

2.11.1 Overview

Implement automated regression test coverage of the new Program Status search criteria on the three Workload Inventory pages.

2.11.2 Description of Change

Create/update test scripts to perform searches and verify at least one applicable result on each of the following pages by Program Status:

1. Eligibility Workload Inventory
2. Employment Services Workload Inventory
3. Child Care Workload Inventory

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch Interface	Drop Worker Lookup table	Drop Worker Logic Lookup Table.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.7.1.7	The LRS shall include a method for tracking and maintaining the number of cases assigned to each individual worker or group of workers.	The logic to be used in determining the current case load to determine program assignment/reassignment to the position will be updated to disregard programs with denied, discontinued or deregistered status.
2.7.1.14	The LRS shall include a method for cases to be assigned to a holding file where cases can be maintained by designated workers when there is no worker assigned to a caseload.	Adding validation to the Staff Detail page to prevent a staff from being ended when there are programs still assigned to the position. Secondly, the position information will continue to be displayed on the Case Summary page even when there are no staff assigned to the position.
2.7.1.1	The LRS shall support individual cases assigned to multiple files and to multiple workers, as specified by COUNTY-defined program and policy. Some of these workers continue to provide services and support to a client after the traditional cash benefits, Food Stamp, and/or Medi-Cal cases have been closed.	The Life Cycle Reassignment Batch Job will be updated to configurable by county and program when a worker assignment is to be end dated.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207131

DDID 2208 Add Appointments / Tasks Assigned
to Unavailable Workers Dashboard

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Remi Lassiter
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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1 OVERVIEW

This SCR will implement a new Appointments/Tasks Assigned to Unavailable Workers Dashboard that will display appointments and tasks that are assigned to workers who are unavailable. This dashboard will be used by office supervisors to identify and redistribute or reschedule appointment and task conflicts due to worker unavailability.

Note: This dashboard is similar to the on request reports in the previous reporting tool, but in the new reporting Qlik platform, on request reports function more similarly to Qlik dashboards.

1.1 Current Design

There is currently no report or dashboard in CalSAWS which provides details on appointments or tasks assigned to unavailable workers.

1.2 Requests

1. Add a dashboard that shows any appointments and tasks that are assigned to users that are not available at that time.

1.3 Overview of Recommendations

1. Implement a new Appointments/Tasks Assigned to Unavailable Workers Dashboard.

1.4 Assumptions

1. The dashboard will be developed in Qlik.

2 RECOMMENDATIONS

2.1 Appointments/Tasks Assigned to Unavailable Workers Dashboard

2.1.1 Overview

Implement a new Appointments/Tasks Assigned to Unavailable Workers Dashboard that displays all appointments and tasks that are assigned to workers who are unavailable.

2.1.2 Appointments/Tasks Assigned to Unavailable Workers Dashboard Mockup

The mockup shows the 'Appointments' sheet interface. At the top left is the 'CalSAWS Appointments' header. Below it are two buttons: 'Return to Filters' and 'Tasks'. The filter section includes: County (Los Angeles), Run Date (1/14/2021), Data as of (1/14/2021), and User (userid). Below these are date pickers for Begin Date (11/17/2020) and End Date (11/17/2020). The main title is 'Appointments Assigned to Unavailable Workers'. The search filters include: Worker ID(s), Office Name, Region, Case Number, Attendee(s), Language, Category, Appointment Type, Appointment Date, and Appointment Time.

Figure 2.1.1 – Appointments/Tasks Assigned to Unavailable Workers Dashboard Mockup – Appointments Sheet

The mockup shows the 'Tasks' sheet interface. At the top left is the 'CalSAWS Tasks' header. Below it are two buttons: 'Return to Filters' and 'Appointments'. The filter section includes: County (Los Angeles), Run Date (1/14/2021), Data as of (1/14/2021), and User (userid). Below these are date pickers for Begin Date (11/17/2020) and End Date (11/17/2020). The main title is 'Tasks Assigned to Unavailable Workers'. The search filters include: Worker ID, Office Name, Region, Case Number, Program, Language, Category, Task Type, Assigned Date, and Due Date.

Figure 2.1.2 – Appointments/Tasks Assigned to Unavailable Workers Dashboard Mockup – Tasks Sheet

2.1.3 Description of Change

1. Create a new Appointments/Tasks Assigned to Unavailable Workers Dashboard.
 - i. Generate this dashboard for any selected dates specified in the Report Filters page.
 - ii. Refresh the data for this dashboard daily via a nightly sweep job.
2. The dashboard will contain two sheets – 'Appointments' and 'Tasks'.

- i. **Base Population for Appointments Sheet:** all appointments with a status of 'Scheduled' or 'Rescheduled' that occur during the specified date range for which ALL assigned workers are unavailable during the time of the appointment.
 1. The full duration of the appointment will be examined for conflicts. For example, if an appointment is scheduled from 10:00 – 11:00 AM, and a worker is unavailable starting at 10:30 AM, the appointment will display on this dashboard.
 2. An appointment can have multiple assigned workers. The appointment will only be displayed on this dashboard if ALL assigned workers are unavailable.
 3. A worker is considered unavailable if their availability status is of type 'Leave', 'Unavailable' or 'Vacation Days' OR if the assigned worker is no longer valid (i.e., their Position or Staff record became inactive or their staff assignment to the position has an end date prior to the appointment date.)

Technical Note: Select all appointment records where CUST_APPT.STAT_CODE = 'Scheduled' or 'Rescheduled' and CUST_APPT.APPT_DATE is within the date range

AND

The assigned worker has an availability status, INTAKE_SCH.AVAIL_TYPE_CODE, of 'Leave', 'Unavailable' or 'Vacation Days' (CATGRY_ID = 290) during the duration of the appointment (CUST_APPT.START_TIME and CUST_APPT.STOP_TIME)

OR the assigned worker is now invalid – POS.STAT_CODE = 'Inactive', STAFF.STAT_CODE = 'Inactive' or STAFF_POS_ASSIGN.END_DATE < CUST_APPT.APPT_DATE

- ii. **Base Population for Tasks Sheet:** All tasks with a status of 'Assigned', 'Assigned/In Process', and 'In Process' whose due date falls in the specified date range and for which the assigned worker is unavailable to complete the task. For tasks, there are two ways a worker's availability may be evaluated:
 1. **If it is a task linked to an appointment** by the Automated Action created in SCR 214914, the task's corresponding appointment record will be examined using similar rules as described above for the Appointments sheet to determine if the task should be included in the dashboard. In this scenario, a worker is considered

unavailable to complete the task if ALL assigned workers on the corresponding appointment are unavailable during the scheduled appointment time.

- a. Per the design of SCR 214914, if an appointment has multiple assigned workers, a separate task record is created for each worker by the Automated Action. If any of the assigned workers are available, none of the corresponding task records will be included in this dashboard. Conversely, if all the assigned workers are unavailable, all of the corresponding task records will be included in this dashboard.
 - b. If a task record or records are displayed on the Task sheet the corresponding appointment record will appear in Appointments sheet.
2. **If it is not a task linked to an appointment**, only the task record will be examined for availability. In this scenario, the worker is considered unavailable to complete the task if they are unavailable from the day the dashboard is generated through the due date of the task.
 3. A task can be assigned to a worker or a bank or both. If a task has any assignment to a bank, it will not be considered for this dashboard.
 4. A worker is unavailable if their availability status is of type 'Leave', 'Unavailable' or 'Vacation Days' OR if the assigned worker is no longer valid (i.e., their Position or Staff record became inactive or their staff assignment to the position has an end date prior to the task due date.)

Technical Note: Select all task records where TASK.STAT_CODE is 'Assigned', 'Assigned/In Process', or 'In Process' and the TASK.DUE_DATE is within the date range and TASK.BANK_ID is NULL

AND

The assigned worker has an availability status (INTAKE_SCH.AVAIL_TYPE_CODE) of 'Leave', 'Unavailable' or 'Vacation Days' from the day the dashboard is generated through the task's due date

OR TASK_ATTR.ATTR_NAME = 'taskAppointmentInfo' and ALL workers on the corresponding appointment record (TASK_ATTR.ATTR_VALUE) have an availability status (INTAKE_SCH.AVAIL_TYPE_CODE) of 'Leave', 'Unavailable' or 'Vacation Days' during the duration of the appointment (CUST_APPT.START_TIME and CUST_APPT.STOP_TIME)

OR the assigned worker is now invalid -
 POS.STAT_CODE = 'Inactive', STAFF.STAT_CODE =
 'Inactive' OR STAFF_POS_ASSIGN.END_DATE <
 TASK.DUE_DATE

Please refer to the Appendix for a visual of the logic for these two sheets and examples of how appointments and tasks are expected to be included in this dashboard.

3. The dashboard will have the following columns defined in the tables below:

Appointments Sheet Column Definitions

Column Name	Column Description
Worker ID(s)	The worker ID(s) of the worker(s) assigned to the appointment. If multiple Workers, each worker ID will be displayed in numerical order separated by a comma. Format: WorkerID, WorkerID Note: multiple workers will only be displayed if ALL assigned workers are unavailable.
Appointment Office	The office name associated with the appointment. This is the office location of the appointment. Note: this field will be blank if an office is not specified for the appointment record. Technical Note: CUST_APPT.OFFICE_NAME
Region	The region associated with the office location of the appointment. Note: this field will be blank for counties that don't use region.
Case Number	The case number associated with the appointment.
Attendee(s)	The individual(s) with whom the appointment is scheduled. If multiple attendees, each name will be displayed alphabetically separated by a comma. Format: FirstName LastName, FirstName LastName Technical Note: CUST_APPT_ATTEND
Language	The primary language associated with the case.
Category	The category of the appointment (CATGRY_ID = 291). Possible Values: (Note: this list is as of when this design was written and subject to change in the future) <ul style="list-style-type: none"> • Counselor Meeting

	<ul style="list-style-type: none"> • Intake Interview • Re-Evaluation Interview • Home Visit • Meeting with Worker • Group Meeting • Telephone Interview • IEVS Interview • Preventative Fraud Interview • Re-Evaluation CW/CF Interview • Telephone CW/CF RE Interview • Cal-Learn • GROW • General Appointment • WTW/REP • Provider • QC Case Review • YBN Appointment
Appointment Type	The sub-category of the appointment (CATGRY_ID = 10113) Possible values include 'YBN Application Appointment', 'Screening Only', 'Client Requested', 'Direct Rent', 'Fingerprinting' (this is a non-exhaustive list)
Appointment Date	The scheduled date of the appointment. (CUST_APPT.APPT_DATE) Format: MM/DD/YYYY
Appointment Time	The scheduled begin and end time of the appointment. (CUST_APPT.START_TIME, CUST_APPT.STOP_TIME) Format: HH:MM PM/AM – HH:MM PM/AM

Tasks Sheet Column Definitions

Column Name	Column Description
Worker ID	The worker ID of the worker assigned to the task.
Office Name	The office name associated with the worker assigned to the task.
Region	The region of the worker assigned to the task. Note: this field will be blank for counties that don't use region.
Case Number	The case number associated with the task.
Program	The program associated with the task. Note: this field will be blank for tasks that aren't associated to a program. Technical Note: TASK > TASK_PGM > PGM
Language	The language associated with the task.

	Technical Note: TASK.LANG_CODE (CATGRY_ID = 145)
Category	The category of the task type (CATGRY_ID = 10350). Possible values include 'Fraud', 'Case Update', 'Redetermination' (this is a non-exhaustive list).
Task Type	The sub-category of the task (CATGRY_ID = '399'). Possible values include 'ABAWD', 'Alternate Card Holder', 'Earned Income', 'Fleeing Felon', 'Immigration Status' (this is a non-exhaustive list).
Assigned Date	The date the task was assigned (TASK.ASSIGN_DATE)
Due Date	If task is linked to an appointment, display the date and time of the linked appointment – Format: MM/DD/YYYY HH/MM AM/PM – HH/MM AM/PM Otherwise, display the due date of the task – Format: MM/DD/YYYY

4. Default the sort for both sheets to the Worker ID column.

2.1.4 Report Filters

CalSAWS Report Filters			
Date as of 1/14/2021			
*Begin Date	*End Date	Office Name	Region
5/24/2019	5/24/2019	002 Glendale	Countywide
5/25/2019	5/25/2019	003 Pasadena	Region 1
5/28/2019	5/28/2019	004 El Monte (San Gab. V. Serv. Center)	Region 2
5/29/2019	5/29/2019	005 Belvedere	Region 3
5/30/2019	5/30/2019	006 Cudahy	Region 4
5/31/2019	5/31/2019	007 South Special	Region 5
6/1/2019	6/1/2019	008 Southwest Special	Region 6
6/3/2019	6/3/2019	010 Wishire Special Office	Region 7
6/14/2019	6/14/2019	011 East Valley	

Figure 2.1.3 – Appointments/Tasks Assigned to Unavailable Workers Dashboard Filters

The Appointments/Tasks Assigned to Unavailable Workers Dashboard will have the following filter selections:

- **Begin Date:** restricts the base population of the dashboard to include appointments scheduled to be held on or after the Begin Date and tasks with due dates on or after the Begin Date. This is a required field.
- **End Date:** restricts the base population of the dashboard to include appointments scheduled to be held on or before the End Date and

tasks with due dates on or before the End Date. This is a required field.

- **Office Name:** restricts the base population to appointments and tasks assigned to workers from the selected Office(s).
- **Region:** restricts the base population to appointments and tasks assigned to workers from Office(s) in the selected Region(s).

2.1.5 Report Location

- **Global:** Reports
- **Local:** On-Request
- **Task:** Administrative
- **Title:** Appointments/Tasks Assigned to Unavailable Workers Dashboard
Description: Displays appointments and tasks that are assigned to workers who are unavailable.

2.1.6 Counties Impacted

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

2.1.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
Appointments/Tasks Assigned to Unavailable Workers Dashboard	This right gives access to view the Appointments/Tasks Assigned to Unavailable Workers Dashboard.	Appointments / Tasks Assigned to Unavailable Workers Dashboard

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Appointments / Tasks Assigned to Unavailable Workers Dashboard	This group gives access to view the Appointments/Tasks Assigned to Unavailable Workers Dashboard.	Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor and Regional Call Center Supervisor

2.1.8 Report Usage/Performance

This dashboard is expected to be viewed, on average, once per week per office.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix for Appointments/Tasks Assigned to Unavailable Workers Dashboard	 Security Matrix

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
n/a		

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2208	The CONTRACTOR shall add a dashboard that shows any appointments and tasks that are assigned to users that are not available at that time.	It is assumed only one new dashboard will be created.	New Appointments/Tasks Assigned to Unavailable Workers Dashboard created.

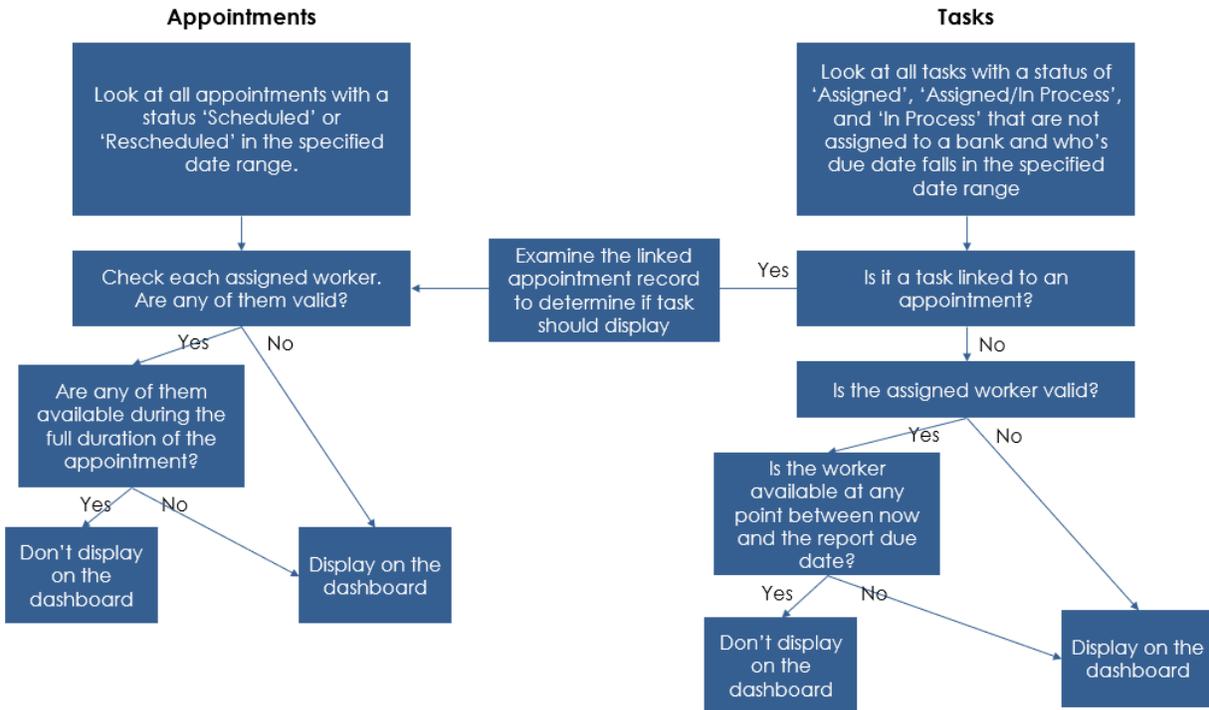
5 MIGRATION IMPACTS

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

6 APPENDIX

6.1 Base Population Logic

The following flow chart provides a visualization of the logic for populating the Appointments and Tasks sheets of the Appointments/Tasks Assigned to Unavailable Workers Dashboard.



6.2 Example Scenarios

The following examples look at how a variety of Appointment and Task records would show up in the Appointments/Tasks Assigned to Unavailable Workers Dashboard over the course of a week if generated each day for the remainder of the week:

- [Scenario 1.1: Appointment with Unavailable Worker](#)
- [Scenario 1.2: Task Linked to an Appointment with Unavailable Worker](#)
- [Scenario 1.3: Task \(not linked to an Appointment\) with Unavailable Worker](#)
- [Scenario 2.1: Appointment with End-Dated Worker](#)
- [Scenario 2.2: Task Linked to an Appointment with End-Dated Worker](#)
- [Scenario 3.1: Appointment with Multiple Workers](#)
- [Scenario 3.2: Task Linked to Appointment with Multiple Workers](#)

6.2.1 Scenario 1.1: Appointment with Unavailable Worker

On 1/25, An appointment is scheduled for 1/30 from 10-11am. On 1/27, the assigned worker's availability status is updated to 'Leave' from 10:30-2pm on 1/30. The supervisor re-assigns this appointment to an available worker on 1/29.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	An appointment is scheduled for 1/30 from 10-11am.	1/25 – 1/31		The appointment is not yet considered for the dashboard because the nightly sweep hasn't refreshed the data yet.
Tue 1/26		1/26 – 1/31		The appointment is considered for the dashboard but not included because there is no conflict in availability for the assigned worker.
Wed 1/27	The assigned worker updates their availability status to 'Leave' from 10:30-2pm on 1/30.	1/27 – 1/31		The appointment is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the assigned worker is unavailable at the time of the appointment.
Thu 1/28		1/28 – 1/31	X	The data has been refreshed and the assigned worker is unavailable for the appointment.
Fri 1/29	The supervisor re-assigns this appointment to an available worker.	1/29 – 1/31	X	The appointment was reassigned today but the nightly sweep job hasn't refreshed the data yet.
Sat 1/30 (Appt Date)		1/30 – 1/31		The appointment is considered for the dashboard but not included because it was reassigned to an available worker.
Sun 1/31		1/31		The appointment is not considered for the dashboard because it is outside the date range.

6.2.2 Scenario 1.2: Task Linked to an Appointment with Unavailable Worker

The appointment in Scenario 1.1 is linked to a task by Automated Action. On 1/25, a task is created with a due date of 1/30 and linked to the Appointment record. On 1/27, the assigned worker's availability status is updated to 'Leave' from 10:30-2pm on 1/30. The supervisor re-assigns this appointment to an available worker on 1/29. The task record is automatically updated to reflect this change via a nightly sweep.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	A task is created with a due date of 1/30 and linked to the Appointment record.	1/25 – 1/31		The task is not yet considered for the dashboard because the nightly sweep hasn't refreshed the data yet.
Tue 1/26		1/26 – 1/31		The task is considered for the dashboard but not included because there is no conflict in availability for the assigned worker.
Wed 1/27	The assigned worker updates their availability status to 'Leave' from 10:30-2pm on 1/30.	1/27 – 1/31		The task is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the assigned worker is unavailable at the time of the appointment.
Thu 1/28		1/28 – 1/31	X	The data has been refreshed, the linked appointment record is examined for conflicts, and the task record is included in the dashboard because the assigned worker is unavailable for the appointment.
Fri 1/29	The supervisor re-assigns this appointment to an available worker. The task record is updated to reflect this change via a nightly sweep.	1/29 – 1/31	X	The appointment was reassigned today but the nightly sweep job hasn't refreshed the data yet.
Sat 1/30 (Due Date)		1/30 – 1/31		The task is considered for the dashboard but not included because it was reassigned to an available worker.
Sun 1/31		1/31		The task is not considered for the dashboard because it is outside the date range.

6.2.3 Scenario 1.3: Task (not linked to an Appointment) with Unavailable Worker

A task (not linked to any appointment) is assigned to a worker with a due date of 1/29. On 1/26, The assigned worker's availability status is updated to 'Vacation Days' for 1/28-1/31. On 1/29, the task is still not complete, and the supervisor re-assigns the task to an available worker.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	A task is assigned to a worker with a due date of 1/29.	1/25 – 1/31		The task is not yet considered for the dashboard because the nightly sweep hasn't refreshed the data yet.
Tue 1/26	The assigned worker's availability status is updated to 'Vacation Days' for 1/28-1/31.	1/26 – 1/31		The task is considered for the dashboard but not included because the data hasn't been refreshed to reflect the worker's new availability.
Wed 1/27		1/27 – 1/31		The data has been refreshed to reflect the worker's new availability, but the task is not included in the dashboard because the worker is available for at least one day leading up to the task's due date.
Thu 1/28		1/28 – 1/31	X	The task is included in the dashboard because the worker is now unavailable through the due date for this task.
Fri 1/29	The task is still not complete, and the supervisor re-assigns the task to an available worker.	1/29 – 1/31	X	The task is included in the dashboard because the data hasn't been refreshed yet to reflect the updated worker assignment.
Sat 1/30 (Due Date)		1/30 – 1/31		The task is considered for the dashboard but not included because it was reassigned to an available worker.
Sun 1/31		1/31		The task is not considered for the dashboard because it is outside the date range.

6.2.4 Scenario 2.1: Appointment with End-Dated Worker

On 1/1, a worker was assigned to appointment that is scheduled for 1/30. On 1/25 they are promoted to a new position which they will start on 1/27 so the end date of their current staff position assignment is updated to 1/27. The supervisor re-assigns this appointment to a new worker on 1/27.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	Worker is promoted to a new position and the end date of	1/25 – 1/31		The appointment is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the worker is unavailable.

	their staff position assignment is updated to 1/27.			
Tue 1/26		1/26 – 1/31	X	The data has been refreshed and the appointment is included in the dashboard because the staff position assignment of the assigned worker has an end date prior to the appointment date making them unavailable for the appointment.
Wed 1/27	The supervisor re-assigns this appointment to a new worker.	1/27 – 1/31	X	The appointment is included in the dashboard because the data hasn't been refreshed yet to reflect the updated worker assignment.
Thu 1/28		1/28 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Fri 1/29		1/29 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sat 1/30 (Appt Date)		1/30 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sun 1/31		1/31		The appointment is not considered for the dashboard because it is outside the date range.

6.2.5 Scenario 2.2: Task Linked to an Appointment with End-Dated Worker

The appointment in Scenario 2.1 is linked to a task by Automated Action. On 1/1, a task is created with a due date of 1/30 and linked to the Appointment record. On 1/27, the end date of their staff position assignment for the assigned worker of the appointment record is updated to 1/27. The supervisor re-assigns this appointment to a new worker on 1/27, and the task record is automatically updated to reflect this change via a nightly sweep.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	Worker is promoted to a new position and the end date of their staff position assignment is updated to 1/27.	1/25 – 1/31		The task is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the worker is unavailable.

Tue 1/26		1/26 – 1/31	X	The data has been refreshed and the task is included in the dashboard because the staff position assignment of the assigned worker for the corresponding appointment record has an end date prior to the appointment date making them unavailable for the appointment.
Wed 1/27	The supervisor re-assigns the appointment to a new worker. The task record is automatically updated to reflect this change via a nightly sweep.	1/27 – 1/31	X	The task is included in the dashboard because the data hasn't been refreshed yet to reflect the updated worker assignment.
Thu 1/28		1/28 – 1/31		The task is considered for the dashboard but not included because it is now assigned to an available worker.
Fri 1/29		1/29 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sat 1/30 (Due Date)		1/30 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sun 1/31		1/31		The task is not considered for the dashboard because it is outside the date range.

6.2.6 Scenario 3.1: Appointment with Multiple Workers

On 1/25 an appointment is scheduled with two assigned workers for 1/30. On 1/28, Worker 1 is terminated, and their staff id is inactivated. Worker 2 remains active.

This appointment will never display on the dashboard because there is always at least one valid assigned worker.

6.2.7 Scenario 3.2: Task Linked to Appointment with Multiple Workers

The appointment in Scenario 3.1 is linked to two tasks by Automated Action. With the creation of the appointment on 1/25, one task was created for Worker1 and a second task was created for Worker 2.

Neither task will ever display on the dashboard because although the individual task assigned to Worker 1 is assigned to an unavailable worker, it is linked to an appointment record that has at least one valid assigned worker (Worker 2).

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-212833

Remove Selected Non-State LRS Forms from the
system

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1 OVERVIEW

Region 6 has identified a list of 23 non-state Forms that have not been printed in the last year. These Forms are considered obsolete and can be removed from the LRS/CalSAWS system. This change will remove these Forms from the Template Repository and remove any Form Generation Triggers associated with each. This will be an LRS-only change.

1.1 Current Design

25 Non-State Forms currently in the LRS Template Repository have not been generated within the past year.

1.2 Requests

Remove selected non-state Forms from the LRS Template Repository.

1.3 Recommendations

1. Remove selected Forms from the LRS Template Repository
2. Remove Trigger Conditions for applicable Forms

2 RECOMMENDATIONS

2.1 Remove selected Forms from the LRS Template Repository

Remove the following Forms from the LRS Template Repository:

Form Number	Form Name	Language(s)
GN 6055*	GAIN/GROW Vocational Assessment Invoice	EN
GN 6120*	Confidentiality Agreement	EN
GN 6141	Los Angeles County's List of Self-Initiated Programs	EN
GN 6142*	Welfare-to-Work Grant Program Certification Form (3/10)	EN
GN 6204	Cal-Learn Checklist	EN
GN 6339	Request for CalWORKs Documents needed for Child Care due to New Child	EN, SP, Threshold
MC-1 Fraud	MEDI-CAL EARLY FRAUD DETECTION PREVENTION REFERRAL	EN
NOA 992	Notice of Action Vehicle Diagnosis & Repair Program	EN, SP, Threshold
PA 1164	NOTICE OF POTENTIAL ELIGIBILITY REQUEST FOR VERIFICATION 60 - DAY POSTPARTUM PROGRAM	EN
PA 1866	Food Stamps Shared Housing/Utility Costs Supplemental Questionnaire	EN
PA 334	Record of Investigative Activity	EN
PA 4035	Direct Rent Appointment Notice	EN
PA 4045	ATTENTION U.S. CITIZENS	EN, SP
PA 6034	Share-of-Cost Flyer	EN, SP, Threshold
PA 6075	Redetermination Informational Material	EN
PA 6076	Do You Receive Medi-Cal and IHSS?	EN, SP
WFP&I 1239	Overpayment Calculation Form	EN
WFP&I 1263	CalFresh Overissuance Calculation	EN

WFP&I 23	Fraud Investigation Interim Report	EN
WFP&I CALC 1	CALCULATION	EN
WFP&I CC-A-IV-502	Positive Fraud -Overpayment Amount	EN
WFP&I EDMS	WFP&I EDMS Cover Letter	EN
WFP&I FIS	Fingerprint Identification Services	EN

*Form has Trigger Conditions which must also be removed.

Forms must be removed in all languages. Forms must be end-dated 12/31/2021.

2.2 Remove Trigger Conditions for Applicable Forms

Of the Forms listed, four have documented Trigger Conditions. Any of the following conditions remaining in the system must also be removed as a part of this change:

Form Number	Trigger Condition(s)
GN 6055 Batch Job: PB19F210	Auto-trigger this form via batch when vocational and learning disability assessments have been completed. Control for 10 business days and require a return envelope.
GN 6120	<i>System Generated On-line.</i> Trigger this form to be printed in the office when a WEX component/activity is opened/added in the Customer Activity Page.
GN 6142	Auto-print locally when the following component has been added to the Participant Component Selection screen: <ul style="list-style-type: none"> • PWE – Paid Work Experience • OJT –On Job Training Auto-print locally as the action is completed on the page

3 SUPPORTING DOCUMENTS

Ref #	Document	Functional Area	Description	Attachment
1	GN 6055 FDD	GAIN	FDD for GN 6055 - GAIN/GROW Vocational Assessment Invoice	 GN 6055 GAIN Invoice.pdf
2	GN 6120 FDD	GAIN	FDD for GN 6120 – Confidentiality Agreement	 FD_FRM_GN6120 .pdf
3	GN 6142 FDD	GAIN	FDD for GN 6142 - Welfare-to-Work Grant Program Certification Form (3/10)	 GN 6142 Welfare-to-Work Grar
4	PA 1164	PA	FDD for PA 1164 - NOTICE OF POTENTIAL ELIGIBILITY REQUEST FOR VERIFICATION 60 - DAY POSTPARTUM PROGRAM	 FD_FRM_PA1164.pdf

4 REQUIREMENTS

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1208	The [CaSAWS] shall accommodate and generate State-mandated forms, notices, and NOAs that cannot be changed.	Removes NOAs that are not state-mandated and have not been utilized in the past year.

CalSAWS | Batch Memorandum for June 2021 CW Earned Income Disregard

Date: 04/14/2021	Regulation: ACL 19-76
Time: 1:30 -2:30	Meeting Called by: CalSAWS
Attendees: PPOCs, RMs, CW/CF Committee Members, CalSAWS	

Memorandum Purpose

This memorandum is intended to convey the Batch EDBC scope, county actions and schedule for the 2021 Earned Income Disregard and IRT reevaluation for CalWORKs (CW), effective June 2021.

Scope

- **CA-212912 || CIV-106461**

CalSAWS and C-IV increased the CW Disability Based Earned and Unearned Income Disregard from \$500 to \$550 as well as update the IRT Tier 2 to be based on the Assistance Unit (AU) Size rather than Family Unit Size, effective June 1, 2021. These updates were added into both systems on March 22, 2021.

- **CA-213719 || CIV-106463**

On Saturday, May 08, 2021, CalSAWS and C-IV will process Batch EDBC to apply the new Earned and Unearned Income Disregard amounts, reevaluate IRT, and calculate benefits for CW/RCA programs for June 2021 benefit month.

Batch

In CalSAWS and C-IV, run Batch EDBC for CW/RCA programs that contain at least one active person with income effective June 2021 and/or contains an active Family Size Only ('FSO') or Financially Responsible – Included ('FRI') role for the benefit month of June 2021. The Batch EDBC will exclude cases from the targeted populations based on the following exceptions:

- The benefit month is past the latest RE due date for the program.
- The program has a SAR7 Due Month of 05/2021 and the report status is Sent, Received, or Incomplete.
- An EDBC has already been processed for the 06/2021 benefit month since the implementation of SCR CA-212912 / CIV-106461.

Journal Entry

In CalSAWS, one of the following standard Journal Entries will be created automatically when the EDBC batch is run, based on the following Sub Type codes:

- 1) Cases that contain at least one person with income effective June 2021 will use Sub Type code = 'CT942-XX' – 'CW EID Update' with the following descriptions:

Short Description: Batch EDBC ran for <month, year>

Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: 'CW EID Update'

- 2) Cases that contain an active 'FSO' or 'FRI' role for the benefit month of June 2021 will use Sub Type code = 'CT942-C4' - 'CW IRT Update' with the following descriptions:

Short Description: Batch EDBC ran for <month, year>

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: 'CW IRT Update'

In C-IV, one of the following standard journals will be created by data change requests:

- 1) Cases that contain at least one person with income effective June 2021 will have a journal entry with the following information inserted:

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for [MONTH/YEAR].

Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <program> program for following reasons: 'CW EID Update'.

- 2) Cases that contain an active 'FSO' or 'FRI' member for the benefit month of June 2021 will have a journal entry with the following information inserted:

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for [MONTH/YEAR].

Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <program> program for following reasons: 'CW IRT Update'.

NOAs

In CalSAWS, a data change request will update the effective month to June 2021 for SAR 2 forms to populate the latest IRT limit for the cases run through this stand-alone batch run.

List Details

Lists will be posted for C-IV and CalSAWS to aid the counties to review the cases to verify accurate action was taken after Batch EDBC completes. The lists will be available to the counties at the following locations:

C-IV - CalSAWS Web Portal>System Changes> SCR and SIR Lists > 2021 >SCR CIV-106463

CalSAWS - CalSAWS Web Portal>System Changes> SCR and SIR Lists > 2021 > SCR CA-213719

The lists will display the standard columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

- List Name:** Cases discontinued by the Batch EDBC process.
Additional Column(s): Program Type, Program Closure Reason
County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.
- List Name:** Cases where the Batch EDBC process closed a person.
Additional Column(s): Program Type
County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close persons, review these cases to verify the closure was accurate.
- List Name:** Cases where the EDBC resulted in a benefit reduction
Additional Column(s): Include additional columns to indicate each benefit reduction type in a separate column (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change, Benefit Month).
County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Review these cases to verify the benefit reduction was accurate.
- List Name:** Cases which resulted in a read-only EDBC
Additional Column(s): Program Type, Read-Only Reason

County Action: Since Batch EDBC could not automatically apply the intended change to these cases, users may process EDBC to apply intended changes, if applicable.

5. **List Name:** Unprocessed cases where the Batch EDBC process skipped a program
Additional Column(s): Program Type, Skip Reason
County Action: Since Batch EDBC did not automatically apply the intended change to these cases, users may process EDBC to apply intended changes, if applicable.

Please Note:

- Review cases included in the lists and take necessary action.
- Review the Batch Eligibility Report and action cases which could not be processed. This report is an on-request report available under Global: Reports > Local: On Request > Task: Administrative. If you do not see this report, please contact your Security Administrator for rights. To see cases not processed select a status of 'Not Processed' on the Reports Parameters pages.

Things to remember about EDBC batch processes

- All impacts from Defects and SCRs which have not been implemented will continue to occur during the batch processing.
- There are multiple reasons why a program may not be successfully run through Batch EDBC processing. Some examples include: No Worker Assigned, Overridden Program Case, and Pending Program/Person/Application. Please review tasks and the Batch Eligibility Report daily.
- The EDBCs will have an EDBC Source of 'Batch EDBC Rules'.
- When a user runs EDBC on a case where a prior pending month exists, the EDBC will have a type of Read-Only. When running Batch EDBC that restriction does not apply and these EDBCs will not be Read-Only.
- Any updates or lack of updates made/not made to cases will impact the Batch EDBC results. This means programs may be discontinued (due to non-compliances, etc.) unexpectedly.
- All notices will be generated normally.

Development Schedule

Task Date	Task Description
April 14, 2021	Review the Batch process schedule with counties (Memorandum Call)
April 23, 2021	Deliver the driving query and list queries to the System Test team
April 26, 2021 – May 7, 2021	System Testing
May 8, 2021	Run Batch EDBC in production for C-IV and CalSAWS

Schedule Considerations

- The C-IV System will not be available starting at 5:00 pm, Saturday, May 08, 2021.
- The CalSAWS System will remain available during batch processing on Saturday, May 08, 2021.
- Batch jobs scheduled for each evening will run after the Batch EDBC process completes.
- Approximately 47,000 cases will be processed in C-IV for the benefit month of 06/2021.
- Approximately 51,000 cases will be processed in CalSAWS for the benefit month of 06/2021.

Timeline

- Expected CalSAWS and C-IV Batch EDBC processing date: 05/08/2021.

C-IV Calendar May 2021

SUN	MON	TUES	WED	THUR	FRI	SAT
						1
2	3	4 SAR7 Discontinuance	5	6	7	8 CIV-106463 2021 Earned Income Disregard Batch Run
9	10	11	12 NA 960X	13	14	15 CW/CF RE Packets
16	17	18	19 Ten-Day Discontinuan ce/NA RE X	20	21	22
23	24 Send SAR7/SAR2	25	26 Main Payroll	27	28	29 CW/CF Disc
30	31					

CalSAWS Calendar May 2021

SUN	MON	TUES	WED	THUR	FRI	SAT
						1
2	3 SAR7 Discontinuance	4	5 CF/CW RE Appointment 1	6 CF/CW RE Appointment 2	7	8 CA-213719 2021 Earned Income Disregard Batch Run
9	10	11	12 NA 960X	13	14	15
16	17	18	19 Ten-Day Discontinuan ce/NA RE X	20	21 Main Payroll	22
23	24	25	26 Send SAR7	27	28	29 CW/CF Disc
30	31					

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215058 | DDID 2612

Add CSF 173 – Long Term Care (LTC) Six-Month
Physician Statement (01/2021) Form to CalSAWS
System

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/18/2021	1.0	Original	Pramukh Karla

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1 OVERVIEW

The purpose of this change is to add the CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021) form to CalSAWS System.

1.1 Current Design

The CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021) form does not exist in CalSAWS System.

1.2 Requests

1. Add the CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021) form to CalSAWS System in English and all threshold languages.

1.3 Overview of Recommendations

1. Add the CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021) form to CalSAWS System.

1.4 Assumptions

1. When generated in the context of a case, the body fields will be editable, but the header fields will remain read-only for all counties, as per CalSAWS standards.

2 RECOMMENDATIONS

2.1 Add CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021)

2.1.1 Overview

This section will cover the updates needed to add CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021) form to CalSAWS.

Non-State Form: CSF 173

Programs: Medi-Cal

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All Counties

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

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

2.1.2 Description of Change

1. Add CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021) form to CalSAWS System.

Form Header: CalSAWS Standard Header

Form Title: Long Term Care (LTC) Six-Month Physician Statement

Form Template Description: This form is used by counties to get the LTC programs six-months physician statement.

Form Number: CSF 173

Include NA Back 9: No

Imaging Form Name: LTC Six-Month Physician Statement

Imaging Document Type: Customer Verification Forms

Form Mockup/Example: See Supporting Document #1

2. Add the new CSF 173 to Template Repository. The following parameters will be required:

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

CSF 173 form will be blank when generated from the Template Repository, but CalSAWS Standard Header will be populated with Customer and Worker Information.

3. Add the following barcode options to the CSF 173 form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

4. Add the following print options to the CSF 173 Form:

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

Mailing Requirements:

Mail-To (Recipient): Person selected on the Documents Parameter Page

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to SSP (Self Service Portal): Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 173 Mockups	CSF173_EN.pdf CSF173_SP.pdf CSF173_AE.pdf CSF173_AR.pdf CSF173_CA.pdf CSF173_CH.pdf CSF173_FA.pdf CSF173_HM.pdf CSF173_KO.pdf CSF173_LA.pdf CSF173_RU.pdf CSF173_TG.pdf CSF173_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

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

2612	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Santa Cruz - WEL 5063 form with the following content:</p> <ol style="list-style-type: none"> 1) Add the CalSAWS standard header information. 2) Add form title "Long Term Care (LTC) Six-Month Physician Statement" 3) Add the following language : "To: <text line> Physician/ Facility To evaluate the current and ongoing living situation, is <Customer Name> expected to return home within six months? <checkbox> Yes <checkbox> No" 4) Add blank text line for "Physician Signature" and "Date" 5) Add blank text line for "Physician's Name" and "Phone" 6) Add form number using CalSAWS standard naming/numbering format <p>NOTE: See template titled "LTC Six Month Physician Statement" for formatting and content.</p>	<ol style="list-style-type: none"> 1. Estimate is for implementing the new form in English and Spanish. 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. 	<p>With SCR CA-215058, CSF 173 – Long Term Care (LTC) Six-Month Physician Statement (01/2021) form will be added to the CalSAWS System in English and all threshold languages.</p>
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215060 | DDID 2613

Add CSF 175 – Spend Down Declaration (01/2021)
Form to CalSAWS System

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/01/2021	1.0	Original	Pramukh Karla

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1 OVERVIEW

The purpose of this change is to add the CSF 175 – Spend Down Declaration (01/2021) form to CalSAWS System.

1.1 Current Design

The CSF 175 – Spend Down Declaration (01/2021) form does not exist in CalSAWS System.

1.2 Requests

1. Add the CSF 175 – Spend Down Declaration (01/2021) form to CalSAWS System in English and all threshold languages.

1.3 Overview of Recommendations

1. Add the CSF 175 – Spend Down Declaration (01/2021) form to CalSAWS System.

1.4 Assumptions

1. When generated in the context of a case, the body fields will be editable, but the header fields will remain read-only for all counties, as per CalSAWS standards.

2 RECOMMENDATIONS

2.1 Add CSF 175 – Spend Down Declaration (01/2021)

2.1.1 Overview

This section will cover the updates needed to add CSF 175 – Spend Down Declaration (01/2021) form to CalSAWS.

Non-State Form: CSF 175

Programs: Medi-Cal

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All Counties

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

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

2.1.2 Description of Change

1. Add CSF 175 – Spend Down Declaration (01/2021) form to CalSAWS System.

Form Header: CalSAWS Standard Header

Form Title: Spend Down Declaration

Form Template Description: This form is used by counties to get the spend down declaration from the participants.

Form Number: CSF 175

Include NA Back 9: No

Imaging Form Name: Spend Down Declaration

Imaging Document Type: Property

Form Mockup/Example: See Supporting Document #1

2. Add the new CSF 175 to Template Repository. The following parameters will be required:

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

CSF 175 form will be blank when generated from the Template Repository, but CalSAWS Standard Header will be populated with Customer and Worker Information.

3. Add the following barcode options to the CSF 175 form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

4. Add the following print options to the CSF 175 Form:

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

Mailing Requirements:

Mail-To (Recipient): Person selected on the Documents Parameter Page

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to SSP (Self Service Portal): Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 175 Mockups	CSF175_EN.pdf CSF175_SP.pdf CSF175_AE.pdf CSF175_AR.pdf CSF175_CA.pdf CSF175_CH.pdf CSF175_FA.pdf CSF175_HM.pdf CSF175_KO.pdf CSF175_LA.pdf CSF175_RU.pdf CSF175_TG.pdf CSF175_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
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2613	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the San Luis Obispo DSS MC 432 with the following content:</p> <p>1) Add the CalSAWS standard header information.</p> <p>2) Add title "Spend Down Declaration"</p> <p>3) Add the following language: " On <Date>, the county determined your property exceeds the resource limit for Medi-Cal. The Medi-Cal property limit for your household is <household limit> and your countable property is <text line></p> <p>If you are over the property limit, you can spend down your property so you no longer exceed the limit and qualify for free Medi-Cal coverage. Complete this form and attach proof of each item listed to show how you spent the excess property. Acceptable proof includes cancelled checks, dated receipts, bank statements, a signed statement under penalty of perjury, and any other proof that shows how you spent the property.</p> <p>If you spend down to below the resource limit</p>	<ol style="list-style-type: none"> 1. Estimate is for implementing the new form in English and Spanish. 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. 	<p>With SCR CA-215060, CSF 175 – Spend Down Declaration (01/2021) form will be added to the CalSAWS System in English and all threshold languages.</p>
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	<p>before [DATE, the end of the month of application], you will be eligible for Medi-Cal for that entire month. You can also spend down your property on past qualified medical expenses. Qualified medical expenses are medical expenses that were incurred in any month and that were unpaid in the same month where you had excess property for the entire month. You can be eligible after you pay those qualified medical expenses and you give proof to the county.</p> <p>SPEND DOWN OF EXCESS PROPERTY MUST BE COMPLETED BY <text line> [Add subscript "DATE"]</p> <p>4) Add a table with the following columns:</p> <ul style="list-style-type: none"> a) Date: b) Amount: c) Paid to: d) For: e) Receipts Attached: <p>5) Below chart add language: "I declare, under the penalty of perjury, that the statements made on this form are true and correct."</p> <p>6) Add blank text lines for Signature and Date"</p> <p>7) Add page break</p>		
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<p>8) Add page 2 with header "SPEND DOWN DECLARATION (Cont.)"</p> <p>9) Add table below with the following columns:</p> <ul style="list-style-type: none">a) Date Spent:b) Amount Spent:c) Spent or Paid to:d) For:e) Receipts Attached: <p>10) Add the form number using CalSAWS standard naming/numbering format</p>		
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215106

DDID 2636: Add CSF 174 – Statement of
Gift/Loan (12/20)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/07/2021	0.1	Initial Draft	Maria Jensen
02/03/2021	0.2	BA comments: Cleaned up 2 nd request	Maria Jensen
02/08/2021	0.3	BA comments: Added original form name in Request section	Maria Jensen

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1 OVERVIEW

This SCR will add the CSF 174 – Statement of Gift/Loan (12/20) non State form to the CalSAWS system.

1.1 Current Design

Currently the CSF 174 non State form does not exist in the CalSAWS system.

1.2 Requests

1. Migrate new Non State Form CSF 174 (formerly known as CSF 23) - Statement of Gift/Loan to the CalSAWS system. (See Supporting Documents #1-2)
2. This form will be available in the Template Repository in all system supported threshold languages.

1.3 Overview of Recommendations

1. Add new Non State Form CSF 174 - Statement of Gift/Loan.
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information, in all threshold languages.

1.4 Assumptions

1. When generated in the context of a case, the body fields will be editable for all counties, as per CalSAWS standards.

2 RECOMMENDATIONS

2.1 Add Form CSF 174 - Statement of Gift/Loan

2.1.1 Overview

This SCR will add the non State form CSF 174 – Statement of Gift/Loan (revision 12/20) to the CalSAWS system.

Non State Form: CSF 174 (12/20)

Programs: All

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

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

2.1.2 Create Form CSF 174 XDP

1. The new form will have 1 impression which will consist of static verbiage provided by the State, as well as a number of input fields. Please see the Supporting Documents #1-2 for details.

Form Header: CalSAWS Standard Header #1

Form Title (Document List Page Displayed Name): Statement of Gift/Loan

Template Description: This form is a statement a gift or loan to be filled in by customers.

Form Number: CSF 174

Include NA Back 9: No

Imaging Form Name: Statement of gift or loan

Imaging Document Type: Sworn Statements

Form Mockups/Examples: See Supporting Documents #1-2 for PDF Mockups

2. Barcode options for the CSF 174 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. Add Form CSF 174 to the Template Repository in all threshold languages for all 58 counties.

Required Document Parameters: Case Number, Customer Name, Program, Language

4. Include the following Print Options and Mailing Requirements for Form CSF 174:

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

Mailing Requirements:

Mail-To (Recipient): Participant selected on the document parameters page

Mailed From (Return): Standard Population

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Outgoing Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: No

Electronic Signature: No

Post to SSP: Yes

Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 174 Existing Languages	CSF174_EN.pdf
2	Correspondence	CSF 174 Threshold Languages	CSF174_AR.pdf CSF174_AE.pdf CSF174_CA.pdf CSF174_CH.pdf CSF174_FA.pdf CSF174_HM.pdf CSF174_KO.pdf CSF174_LA.pdf CSF174_RU.pdf CSF174_SP.pdf CSF174_TG.pdf CSF174_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2636	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the CSF 23 Request for Insurance Information with the following content:</p> <p>1) Add the CalSAWS standard header information</p> <p>2) Add form title "Statement of Gift/Loan"</p> <p>3) Add the following text language: "I, <text line> [Add Subscript "Loan/Gift Giver"] gave <text line> [Add Subscript "Applicant/Recipient Name"] money totaling \$ <text line> on <text line> [Add Subscript "Month/Day/Year"] for <text line> [Add Subscript "Months/Year"]"</p> <p>I consider this money: (check one)</p> <p><checkbox> A Gift</p> <p>Is it for a specific purpose?</p> <p><checkbox> Yes <checkbox> No</p> <p>If yes, please explain <text line></p> <p>Is it expected to continue? <checkbox> Yes <checkbox> No</p> <p>If yes, how often? <text line></p> <p><checkbox> A Loan</p> <p>When is the loan to be repaid? (Specify terms)</p> <p>Date repayment will (or did) begin: <text line></p> <p>Amount of each payment \$ <text line></p> <p>How often: <text line>"</p>	<p>1. Estimate is for implementing the new form in English and Spanish.</p> <p>2. Spanish translations will be provided by the Consortium.</p> <p>3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.</p> <p>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.</p>	<p>With SCR CA-215106, form CSF 174 – Statement of Gift/Loan will be added to the CalSAWS system.</p>

	<p>4) Add the following language: "I declare that this information is true and correct." 5) Add blank text line for "Provider Signature", "Date" and "Provider Phone Number " 6) Add the following language: "I, <text line>, the recipient of the money, hereby agree with the above statements. " 7) Add text line for "Applicant/Recipient Signature" and "Date" 8) Add form number using CalSAWS standard naming/numbering format NOTE: See template titled "Statement of gift or loan" for formatting and content.</p>		
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215136

DDID 2651: Add CSF 176 – Expiration of Medical
Report/Verification (12/20)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/08/2020	0.1	Initial Draft	Maria Jensen
02/10/2021	0.2	BA Comments fixes	Maria Jensen
02/26/2021	0.3	QA Comment fix: Added Revised DDID Requirement	Maria Jensen

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1 OVERVIEW

This SCR will add the CSF 176 – Expiration of Medical Report/Verification (12/20) Non State form to the CalSAWS system.

1.1 Current Design

Currently the CSF 176 Non State form does not exist in the CalSAWS system.

1.2 Requests

1. Implement new Non State Form CSF 176 - Expiration of Medical Report/Verification in the CalSAWS system. (See Supporting Documents #1-2)
2. This form will be available in the Template Repository in English and the system supported threshold languages which include Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

1. Add new Non State Form CSF 176 - Expiration of Medical Report/Verification.
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information, in English and the 12 supported threshold languages.

1.4 Assumptions

1. The CSF 176 form contains a reference to an attached form. The worker will print the appropriate form to send to the Customer along with form CSF 176.

2 RECOMMENDATIONS

2.1 Add Form CSF 176 - Expiration of Medical Report/Verification

2.1.1 Overview

This SCR will add the Non State form CSF 176 – Expiration of Medical Report/Verification (revision 12/20) to the CalSAWS system.

Non State Form: CSF 176 (12/20)

Programs: Medi-Cal

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

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

2.1.2 Create Form CSF 176 XDP

1. The new form will have 1 impression which will consist of static verbiage provided by the State. Please see the Supporting Documents #1-2 for details.

Form Header: CalSAWS Standard Header #1

Form Title (Document List Page Displayed Name): Expiration of Medical Report/Verification

Template Description: This form is used to inform customers that the verification of disability or incapacity will expire.

Form Number: CSF 176

Include NA Back 9: No

Imaging Form Name: Expiration of Medical Report/Verif

Imaging Document Type: Medical Reports/Records

Form Mockups/Examples: See Supporting Documents #1-2 for PDF Mockups

2. Barcode options for the CSF 176 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. Add Form CSF 176 to the Template Repository in all threshold languages for all 58 counties.

Required Document Parameters: Case Number, Customer Name, Program, Language

4. Include the following Print Options and Mailing Requirements for Form CSF 176:

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

Mailing Requirements:

Mail-To (Recipient): Participant selected on the document parameters page

Mailed From (Return): Standard Population

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Outgoing Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: No

Electronic Signature: No

Post to SSP: Yes

Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 176 (English)	CSF176_EN.pdf
2	Correspondence	CSF 176 Threshold Languages	CSF176_AR.pdf CSF176_AE.pdf CSF176_CA.pdf CSF176_CH.pdf CSF176_FA.pdf CSF176_HM.pdf CSF176_KO.pdf CSF176_LA.pdf CSF176_RU.pdf CSF176_SP.pdf CSF176_TG.pdf CSF176_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2651	<p>Original:</p> <p>The CONTRACTOR shall add a new form to the CalSAWS software based on the CSC 28 (11/04) - Expiration of Medical Report/Verification form with the following content:</p> <ol style="list-style-type: none"> 1) Add the CalSAWS standard header 2) Add form title "Expiration of Medical Report/Verification" 3) Add the following paragraph: "We need proof of disability or incapacity to review your eligibility for the benefits you get. The verification of disability or incapacity for <text line> [subscript "(Name)"] will expire on <text line>[Subscript "(Date)"]." 4) Add second paragraph, "If this person is still disabled or incapacitated, have a medical provider or medical authorized representative complete the attached form and return it to the county. If you are no longer disabled or incapacitated, report the change to the county." 5) Add the following sentence: "Failure to provide the new medical verification may affect your eligibility and/or the benefits you get." 6) Add third paragraph: "If you disagree with this request or believe you have received it in error, please contact your local 	<ol style="list-style-type: none"> 1. Estimate is for implementing the new form in English and Spanish. 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. 	<p>With SCR CA-215136, form CSF 176 – Expiration of Medical Report/Verification will be added to the CalSAWS system.</p>

<p>county office." 7) Add form number using CalSAWS standard naming/numbering format.</p> <p>Revised:</p> <p>The CONTRACTOR shall add a new form to the CalSAWS software based on the CSC 28 (11/04) - Expiration of Medical Report/Verification form with the following content:</p> <ol style="list-style-type: none"> 1) Add the CalSAWS standard header 2) Add form title "Expiration of Medical Report/Verification" 3) Add the following paragraph: "We need proof of disability or incapacity to review your eligibility for the benefits you get. The verification of disability or incapacity for <text line> [subscript "Name"] will expire on <text line>[Subscript "Date"]." 4) Add second paragraph, "If this person is still disabled or incapacitated, have a medical provider or medical authorized representative complete the attached form and return it to the county. If you are no longer disabled or incapacitated, report the change to the county." 5) Add the following sentence: "Failure to provide the new medical verification may affect your eligibility and/or the benefits you get." 6) Add third paragraph: "If you disagree with this request or believe you have received it in error, please contact your local county office." 7) Add form number using 		
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	CalSAWS standard naming/numbering format.		
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CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-215927 DDID 2686/2314 FDS: GA GR
Fiscal changes

DRAFT

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Deron Schab
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/17/2020	1.0	Initial Revision	Deron Schab
2/9/2021	1.1	Incorporate change based on Design Review	Deron Schab
2/12/2021	1.2	Incorporate changes based on Build and Test team review	Deron Schab
3/10/2021	1.3	Update County Fiscal Admin logic and remove highlighting	Deron Schab
3/25/2021	1.4	Added SCR number to title	Deron Schab

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DRAFT

1 OVERVIEW

This SCR will implement the CalWIN counties General Assistance/General Relief (GA/GR) program from into the CalSAWS solution

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program. The C-IV implementation allows the users to enter and track the (GA/GR) program using manual EDBC and issuance but does not track employment service activities for the 39 C-IV counties.

1.2 Requests

The Fiscal logic for the GA/GR program will be expanded to support the creation and maintenance of the GA/GR program for the CalWIN counties' GA/GR programs.

1.3 Overview of Recommendations

- Create a Data Change Request (DCR) to insert the GA/GR Issuance Thresholds for the CalWIN counties.
- Update the logic used to determine the Previous Potential Benefits for the General Assistance/General Relief (GR) program.
- Update the logic used to calculate the Overpayment Adjustment Amount for the General Assistance/General Relief (GR) program.
- Update the Issuance Batch to process authorizations for the General Assistance/General Relief (GR) program.
- Update the EBT Cash Benefit Writer logic to process General Assistance/General Relief (GR) program benefit records.
- Update the Issuance Detail page to make the Pay Code field required when the program is "General Assistance/General Relief" for CalWIN counties.
- Update the Issuance Detail page to send an EBT Benefit Type of "GA" via host to host when rushing a General Assistance/General Relief (GR) program benefit issuance.
- Update the Benefit Issuance Claiming batch logic to process issuances, issuance adjustments, and expungements associated with the General Assistance/General Relief (GR) program.
- Update the Service Payment Issuance Claiming batch logic to process issuances, adjustments, and Pay Code Adjustments associated with the General Assistance/General Relief (GR) program.
- Update the Recovery Account Claiming batch logic to process transactions associated with General Assistance/General Relief (GR) program Recovery Accounts.
- Update the Expungement Detail page to allow to display a Reactivate button for General Assistance/General Relief (GR) program expungements.
- Add a County Admin page for Cause Code recoupment information.

- Update the CalSAWS system to include CalWIN GA/GR program Cause Code values.
- Create a new nightly batch job to process fiscal admin changes that are requested by a worker.

1.4 Assumptions

1. County Issuance Thresholds for the General Assistance/General Relief (GR) program will be provided by the CalWIN counties.
2. Migrated CalWIN Fund Code information will be available for CalWIN county testing.
3. CalWIN GA/GR Cause Code Recoupment Rates will be available
4. GA/GR program EDBC Previous Potential calculations will use the existing CalSAWS logic used by C-IV counties.
5. The existing CalSAWS Nightly and Monthly EDBC Sweep logic will be used.
6. The existing logic to set the Benefit Type to 'GA' for GA/GR EBT benefits sent to the EBT Vendor will be used.
7. The existing CalSAWS Cause Codes will be used during GA/GR Recovery Account creation. The CalWIN County Recovery Account Cause Codes will be mapped to existing CalSAWS Cause Codes.
8. The existing CalSAWS logic for calculating the EDBC Overpayment Adjustment amount will use with the County provided recoupment rate values
9. The existing logic to display program specific Cause Codes on the Recovery Account Detail will be used.
10. The existing CalSAWS Recovery Account Activation batch job will be available for the counties to opt into.
11. The existing Pre-Claiming logic will be used to determine issuance records to be processed by the Claiming process
12. The existing EBT End of Day (EOD) Interface File processing for the Account Aging, Grant Expungement, and Excessive Card Email interface files will be used for CalWIN County interface files.
13. There will be no change to the Los Angeles County GA/GR program logic.
14. EDBC must be ran to apply any changes from the Fiscal Admin Summary page. No Automated Mass EDBC will be applied at the time of the update.
15. Los Angeles and C-IV counties will use the existing Cause Code recoupment values and will not be affected by the values entered in the County Fiscal Admin pages.

2 RECOMMENDATIONS

2.1 Issuance Threshold Updates

2.1.1 Overview

Issuance thresholds are established to determine the amount of benefits or service payments that can be approved by an Eligibility worker without requiring a supervisor override.

2.1.2 Request

Create a Data Change Request (DCR) to insert the initial GA/GR Issuance Thresholds for the CalWIN counties. Once loaded into the CalSAWS system, the Issuance Threshold values will be maintained by the county via the County Benefit Issuance Threshold list.

2.1.3 Description of Changes

The county_fiscal_auth database table will be updated with initial Issuance Threshold values provided by the CalWIN Counties.

2.2 Update Previous Potential Benefit logic

2.2.1 Overview

The Previous Potential Benefit logic calculates the total amount of benefits previously issued for a given Program and Benefit Month.

2.2.2 Request

Update the logic used to determine the Previous Potential Benefits for the General Assistance/General Relief (GR) program to follow the current logic for the 'GM' program code

2.2.3 Description of Changes

- 1) Update the logic used to calculate Recovery Account transactions to exclude transactions to General Relief Recovery Accounts where the Recovery Account type is Regular.

2.3 Update Overpayment Adjustment Logic

2.3.1 Overview

The EDBC Overpayment Adjustment Amount represents a benefit reduction due to any open recovery accounts. This amount is calculated using the EDBC calculated Authorized Amount and county specified recoupment rates based upon Recovery Account Cause Codes.

2.3.2 Request

Update the logic used to calculate the Overpayment Adjustment Amount for the General Assistance/General Relief (GR) program.

2.3.3 Description of Changes

- 1) Add logic to use the Cause Code Recoupment Rate from the County Admin page when determining the Overpayment Adjustment Amount.
 - i. If county defined cause code recoupment information exists in the County Admin table, use the county defined values
 - ii. If county defined cause code recoupment information does not exist in the County Admin table, use the recoupment information in the codes table (CT118).

2.4 Update Issuance Batch

2.4.1 Overview

Issuance Batch is responsible for creating an Issuance record for each authorization that is subject to be paid on a Monthly/Nightly basis. This update is to configure the Issuance Batch to process authorizations for the CalWIN counties' GA/GR program.

2.4.2 Description of Changes

Update the Skip Issuance logic in the Issuance Batch to apply the following skip issuance reasons to the EDBC authorizations associated to 'GA/GR program:

- a) Future Month Issuance Cannot be Created Before Last Business Day.
- b) Payee Mailing Address Cannot be Determined.
- c) Aid Code Does Not Exist on Authorization Record.

2.4.3 Execution Frequency

PB00F400-PB00F499 – Daily.

2.4.4 Key Scheduling Dependencies

There are no changes to the scheduling dependencies.

2.4.5 Counties Impacted

CalWIN Counties.

2.4.6 Data Volume/Performance

Cannot be determined prior to CalWIN migration.

2.4.7 Failure Procedure/Operational Instructions

The jobs can be resubmitted after setting the flag to use restart data has been set to true.

2.5 Update EBT Benefit Writer Batch (POXXF403-Daily, POXXF404-Monthly)

2.5.1 Overview

The EBT Benefit Writer batch jobs create interface files to be sent to the EBT Vendor. These files contain information of benefits to be posted to customer EBT Accounts.

2.5.2 Request

Update the EBT Cash Benefit Writer logic to process GA/GR program benefit records for the CalWIN counties.

2.5.3 Description of Changes

Update the EBT Cash Benefit Writer logic to assign the 'GA' EBT Benefit Type for CalWIN County GA/GR program lost or stolen benefits.

2.5.4 Execution Frequency

POXXF403 - Daily
POXXF404 – Monthly.

2.5.5 Key Scheduling Dependencies

There are no changes to the scheduling dependencies.

2.5.6 Counties Impacted

CalWIN Counties.

2.5.7 Data Volume/Performance

Cannot be determined prior to CalWIN migration.

2.5.8 Failure Procedure/Operational Instructions

The jobs can be resubmitted after setting the flag to use restart data has been set to true.

2.6 Update Issuance Detail

2.6.1 Overview

The Issuance Detail page allows the user to view and edit benefit issuance information. Additionally, for warrant and EBT issuances in "Ready for Issuance" status, the user can issue the benefits from the Issuance Detail page.

2.6.2 Request

Update the logic on the Issuance Detail page to process issuances for the CalWIN counties' GA/GR program.

2.6.3 Description for Changes

- a) Update the Issuance Detail page to make the Pay Code field required when the program is "General Assistance/General Relief" for CalWIN counties.
- b) Update the page to send an EBT Benefit Type of "GA" via host to host when rushing a "GR" issuance.
- c) Update the Issuance Detail page to assign the 'GA' EBT Benefit Type for CalWIN County GA/GR program lost or stolen benefits when rushing benefits.

2.6.4 Page Location

- **Global: Case Info**
- **Local: Case Information**
- **Task: Issuance History > Issuance Detail**

2.6.5 Security Update

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Update Benefit Issuance Claiming (PBXXF204)

2.7.1 Overview

The Benefit Issuance Claiming process picks up Benefit Issuances, Benefit Issuance Adjustments, and Expungement issuances and calculates the benefit claiming information.

2.7.2 Request

Update the Benefit Issuance Claiming batch logic to process issuances, issuance adjustments, and expungements associated with the CalWIN counties' GA/GR program.

2.7.3 Description for Changes

- a) Update the Non-Foster Care Benefit Issuance Claiming module to include benefit issuances for the CalWIN counties' GA/GR program.
- b) Update the Non-Foster Care Benefit Issuance Adjustment Claiming module to include benefit issuances for the CalWIN counties' GA/GR issuance.
- c) Update the Issuance Expungement Claiming module to include benefit issuances for the CalWIN counties' GA/GR

2.7.4 Execution Frequency

PBXXF204 – Daily.

2.7.5 Key Scheduling Dependencies

There are no changes to the scheduling dependencies.

2.7.6 Counties Impacted

CalWIN Counties.

2.7.7 Data Volume/Performance

Cannot be determined prior to CalWIN migration.

2.7.8 Failure Procedure/Operational Instructions

The jobs can be resubmitted after setting the flag to use restart data has been set to true.

2.8 Update Service Payment Issuance Claiming (PBXXF203)

2.8.1 Overview

The Service Arrangement Issuance Claiming process picks up Service Arrangement Issuances, Service Arrangement Adjustments, and Service Arrangement Pay Code Adjustments and calculates the benefit claiming information.

2.8.2 Request

Update the Service Arrangement Issuance Claiming batch logic to process issuances, issuance adjustments, and Pay Code adjustments associated with the CalWIN counties' GA/GR program.

2.8.3 Description for Changes

- a) Update the Service Arrangement Claiming module to include Service Arrangement issuances for the CalWIN counties' GA/GR program.
- b) Update Service Arrangement Adjustment Claiming module to include Service Arrangement Issuance Adjustments for the CalWIN counties' GA/GR program Service Payment Adjustments.
- c) Update the Service Arrangement Pay Code Adjustment Claiming module to include Service Arrangement Pay Code Adjustments for the CalWIN counties' GA/GR program.

2.8.4 Execution Frequency

PBXXF203 – Daily.

2.8.5 Key Scheduling Dependencies

There are no changes to the scheduling dependencies.

2.8.6 Counties Impacted

CalWIN Counties.

2.8.7 Data Volume/Performance

Cannot be determined prior to CalWIN migration.

2.8.8 Failure Procedure/Operational Instructions

The jobs can be resubmitted after setting the flag to use restart data has been set to true.

2.9 Update Recovery Account Claiming (PBXXR203)

2.9.1 Overview

The Recovery Account Claiming process picks up Recovery Account Transactions and calculates the benefit claiming information.

2.9.2 Request

Update the Recovery Account Claiming batch logic to process Recovery Account transaction associated with the CalWIN counties' GA/GR program.

2.9.3 Description for Changes

- a) Update the Recovery Account Claiming module to include Recovery Account transactions for the CalWIN counties' GA/GR program.

2.9.4 Execution Frequency

PBXXR203 – Daily.

2.9.5 Key Scheduling Dependencies

There are no changes to the scheduling dependencies.

2.9.6 Counties Impacted

CalWIN Counties.

2.9.7 Data Volume/Performance

Cannot be determined prior to CalWIN migration.

2.9.8 Failure Procedure/Operational Instructions

Set the use restart data flag to true and resubmit the job.

2.10 Update Expungement Detail

2.10.1 Overview

The Expungement Detail displays information about Expunged issuances. Additionally, for GA/GR expunged issuances, the user can use the Reactivate button to set the Expungements to "Pending Reactivation", so that the nightly batch issuance process will reactivate and create a reactivated issuance for this expungement.

2.10.2 Request

Make the "Reactivate" button available for CalWIN counties'.

2.10.3 Description for Changes

Update the logic used to enable the Reactivate button to display the button when all the following conditions are met:

- a. The Expunged Benefit Type is "General Assistance".
- b. The County is a CalWIN county.
- c. The Expungement Status is "Received".
- d. The latest EBT Cash Account Type on the case is "Active".
- e. The user has the "Expungement Reactivate" security group

2.11 Update Recovery Account Cause Code values for CalWIN Counties

2.11.1 Overview

During creation of a Recovery Account, a Cause Code is selected by the worker to indicate the reason for the overpayment leading to creation of the Recovery Account.

2.11.2 Request

Add the CalWIN GA/GR Cause Code information into the CalSAWS system.

2.11.3 Description of Changes

The CalWIN GA/GR Cause Code values will be added to the CalSAWS system as follows:

- 1) The initial values for the CalWIN GA/GR Cause Codes will be added to the County Admin table. The Cause Codes in this table will match the Cause Codes in the Codes table (CT118)
 - 2) The Code Hierarchy table used to display the Cause Code drop down menu values on the Recovery Account Detail page will be updated to display the CalWIN County GA/GR program Cause Codes.
- f.

2.12 Update EBT Repayment logic for CalWIN Counties

2.12.1 Overview

The EBT Repayment Detail page allows the user to post benefits from the customer's EBT Account into an Active Recovery Account associated with the case. When setting up the repayment, the user selects which EBT Benefit Type to use for the repayment, along with the option to either Manually select a Recovery Account or allow the application to auto-select a Recovery Account. If the user chooses to have the application select a Recovery Account, the application will attempt to find an Active Recovery Account for a program that is associated in the system with the selected EBT Benefit Type.

2.12.2 Request

Allow "GA" EBT Benefits to be auto-posted to CalWIN county GA/GR Recovery Accounts.

2.12.3 Description of Changes

Add logic to the EBT Repayment functionality to allow the application to auto-post "GA" EBT Benefits to CalWIN county GA/GR Recovery Accounts when the user selects the "Automatic" Posting Type.

2.13 County Fiscal Admin Summary Page

2.13.1 Overview

The County Fiscal Admin Summary page will provide the user a list of fiscal functionalities broken down into different categories. The functionalities will lead the user to a detail page in which they can view the individual parameters.

2.13.2 County Fiscal Admin Summary Page Mockup

County Fiscal Admin Summary

County: Sacramento	
Recovery Account Cause Codes	
Cash - Admin Caused	Edit
Cash - Customer Caused	Edit
Cash - Potential IPV	Edit
Cash - Late QR7	Edit
Cash - Late SAR7	Edit
Sheriff Service Fees	Edit
Bounce Check Charges	Edit
Collection Fee	Edit
Court Filing Fees	Edit

Figure 2.13.2.1 – County Fiscal Admin Summary

2.13.3 Description of Changes

1. County – This field will display the county of the user.
2. Fiscal – This section will contain a list of all Fiscal functionalities that can be edited. Each item listed will be a hyperlink that will lead to the County Fiscal Admin Detail page in View mode and will have an Edit button that will lead to the County Fiscal Admin Detail page in Edit mode. The following options will be available:
 - a. Cash - Admin Caused
 - b. Cash - Customer Caused
 - c. Cash - Potential IPV
 - d. Cash - Late QR7
 - e. Cash - Late SAR7
 - f. Sheriff Service Fees
 - g. Bounce Check Charges
 - h. Collection Fee
 - i. Court Filing Fees

2.13.4 Page Location

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

2.13.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
CountyFiscalAdminSummaryView	County Fiscal Admin Summary	County Fiscal Admin Summary View
CountyFiscalAdminDetailView	County Fiscal Admin Summary	County Fiscal Admin Detail View, County Fiscal Admin Detail Edit
CountyFiscalAdminDetailEdit	County Fiscal Admin Summary	County Fiscal Admin Detail Edit

Security Groups

Security Group	Group Description	Group to Role Mapping
County Fiscal Admin Summary View	This group has the capability to access the County Fiscal Admin Summary page to view existing rule information.	See the Security Matrix for the group to role associations
County Fiscal Admin Detail View	This group has the capability to access the County Fiscal Admin Summary page to view existing rule information.	See the Security Matrix for the group to role associations
County Fiscal Admin Detail Edit	This group has the capability to access the County Fiscal Admin Summary page to view and make modifications to existing rule information.	See the Security Matrix for the group to role associations

2.13.6 Page Mapping

No page mappings are required.

2.13.7 Page Usage/Data Volume Impacts

This is a new page and will not be frequented often in a normal workflow.

2.14 County Fiscal Admin Detail Page

2.14.1 Overview

The County Fiscal Admin Detail page will provide the user a list of Fiscal parameters associated with a particular functionality.

2.14.2 County Fiscal Admin Detail Mockup

County Fiscal Admin Detail

GR Recoverable

County:	View Month:
Sacramento	01/2020

Item	Value	Begin Month	End Month
Cause Code Recoupment Rate	<input type="text" value="10%"/>	<input type="text" value="01/2020"/>	<input type="text" value="04/2020"/>
Minimum Recoupment	<input type="text" value="\$10.00"/>	<input type="text" value="01/2020"/>	<input type="text" value="04/2020"/>

Pending Updates

Item	Value	Begin Month	End Month	Updated By
Minimum Recoupment	\$15.00	04/2020		92

Figure 2.14.2.1 – County Fiscal Admin Detail

2.14.3 Description of Changes

1. The main body section will be labeled with the parent category selected on the summary page.
2. County – The County of the logged in user.
3. View Month – The date the user is viewing the associated rules for. The calendar icon will allow the user to select the date. The date will

- display in MM/YYYY format. Standard Date validation for the date format will apply. The default date will be the current month.
4. View – This button will refresh the rule display information based on dates provided. This button will only display in Edit Mode.
 5. Item – The Parameter associated to this functionality.
 6. Value – Value at the given time. The values will use constraints related to the required data input. (i.e., percentage values will be constrained between 0 and 100, Money values will be constrained to a non-negative value of up to two decimal places).
 7. Begin Month – The date the Value is applicable from. This will be a date field in MM/YYYY format. This date will always evaluate to the first day of the month selected. This field will only be editable in Create and Edit mode. The validation message, “Begin Month cannot be prior to the current month.”, will display if the user attempts to Save with a month prior to the current month.
 8. End Month – The date the Value stopped being applicable. This will be a date field in MM/YYYY format. This date will always evaluate to the last day of the month selected. This field will only be editable in Create and Edit mode. The validation message, “End Month cannot be prior to the Begin Month.”, will display if the user attempts to Save with a month prior to the Begin Month.
 9. Pending Updates – This section will display the list of changes made throughout the day that have yet to be applied by users. Changes made by a user will be pending until they are applied via an overnight batch job. The section will display the same information inserted as well as an updated by column. The updated by column will display a staff id as a link to the worker detail page of the user specified.
 10. Save and Return - This button will save update the information based on the user's input and return the user to the County Fiscal Admin Summary page. This button is only visible in Edit mode.
 11. Cancel - This button will return the user to the County Fiscal Admin Summary page without applying any changes. This button is only visible in Edit mode.
 12. Edit - This button will take the user to the County Fiscal Admin Summary Page in Edit mode. This button is only visible in View mode. This button will only display if the user has the “CountyFiscalAdminDetailEdit” right
 13. Close - This button will return the user to the County Fiscal Admin Summary. This button is only visible in View mode.
 14. Records created will be effective dated so that there is always a high-dated determination for every rule.

2.14.4 Page Location

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

2.14.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
CountyFiscalAdminDetailEdit	County Fiscal Admin Summary	County Fiscal Admin Detail View

Security Groups

Security Group	Group Description	Group to Role Mapping
County Fiscal Admin Detail View	This group has the capability to access the County Fiscal Admin Summary page to view existing rule information.	See the Security Matrix for the group to role associations
County Fiscal Admin Detail Edit	This group has the capability to access the County Fiscal Admin Summary page to view existing rule information.	See the Security Matrix for the group to role associations

2.14.6 Page Mapping

No page mappings are required.

2.14.7 Page Usage/Data Volume Impacts

This is a new page and will not be frequented often in a normal workflow.

2.15 Batch/Interfaces - Create new Fiscal Admin Batch

2.15.1 Overview

The county fiscal admin batch will process each requested fiscal admin change that are listed on the pending updates section of the County Fiscal Admin page.

2.15.2 Description of Change

Create a new batch job that will process each requested fiscal admin change for a county. The job will do the following:

1. Retrieve the pending fiscal admin changes from the transact table that were requested by the worker for processing.

2. End date the current fiscal admin record using the batch date if it currently exists.
3. Insert a new fiscal admin record with the begin date as batch date and the end date as high date.
4. Update the transact record from the table once successfully processed with a Complete status or an Error status if there was an issue processing.

2.15.3 Execution Frequency

Daily(Mon-Sat).

2.15.4 Key Scheduling Dependencies

This batch job should run before Batch EDBC.

2.15.5 Counties Impacted

All counties.

2.15.6 Failure Procedure/Operational Instructions

No change.

DRAFT

3 REQUIREMENTS

3.1 Migration Requirements

DRAFT

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

DRAFT

2686	The CONTRACTOR shall integrate the CalWIN GA/GR rules into the CalSAWS Software.	<p>Fiscal:</p> <p>This estimate includes updates to 19 batch jobs and 2 new batch sweeps. Details of these batch jobs are given below.</p> <ol style="list-style-type: none"> 1. Update to the issuance Batch 2. Creation of a new Daily and Monthly Issuance Sweeps for the GR Program 3. Update the EBT Benefit Writers for the New GR Program 4. Update the EBT Payment Type Logic 5. Update the fund code determination logic 6. Update Claiming batch to use Recoupment Percentage set by county Admin from the County Admin Page 7. Update Recovery account for new program type 8. Update Recovery account activation batch for new program type 9. Update Expungement logic for new GR Program 10. County Interface testing for new program 11. Update Grant Expungement Reader 	<p>Update the following items to account for the CalWIN GA/GR program</p> <ul style="list-style-type: none"> Issuance Batch EDBC Previous Potential Benefit logic EDBC Overpayment Adjustment Amount logic EBT Cash Benefit Writer batch jobs Benefit Issuance Claiming Expungement Detail page Issuance Detail page. <p>Add the Issuance Thresholds for the CalWIN Counties' GA/GR issuances.</p>
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DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		<ul style="list-style-type: none"> 12. update EBT Account Aging reader 13. Update EBT Excessive Email reader 14. Update Benefit Issuance Pre-Claiming logic 15. Update Benefit Issuance Adjustment Pre-Claiming logic 16. Update Benefit Issuance Expungement Pre-Claiming logic 17. Update Benefit Issuance Claiming logic 18. Update Benefit Issuance Expungement Claiming logic 19. Update Benefit Issuance Adjustment Claiming logic 20. Update Recovery Account Activation Batch 21. Update Monthly EDBC Sweep 22. Update Nightly EDBC Sweep 23. Update Nightly Non-FC EDBC Sweep 	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216540

Migrate NA 200 Notice of Action-Multipurpose-
Include Budget

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/22/2020	1.0	Original	Harish Katragadda
02/23/2021	2.0	Updated DBI Fields on form	Harish Katragadda
03/14/2021	3.0	Updated with new NA 200 (12/20) version from CDSS	Harish Katragadda
03/15/2021	4.0	Added Note for Russian version footer	Harish Katragadda

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1 OVERVIEW

The purpose of this change is to add State form NA 200 (12/20) Notice Of Action - Multipurpose - Incl Budget in CalSAWS system and make this form available for all 58 counties.

1.1 Current Design

State form NA 200 (12/20) Form is currently not available in CalSAWS Template Repository.

1.2 Requests

Add State form NA 200 (12/20) Notice Of Action - Multipurpose - Incl Budget Form and make it available to all 58 counties.

1.3 Overview of Recommendations

1. Add NA 200 (12/20) Notice Of Action - Multipurpose - Incl Budget form to CalSAWS Template repository in English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Korean, Hmong, Lao, Tagalog, Russian, Vietnamese.
2. Make the NA 200 form available to all 58 counties.

1.4 Assumptions

1. All Form Fields are editable unless specified.
2. NA 200 is a State form and will not use the Non-State form CSF XXX naming standard.

2 RECOMMENDATIONS

2.1 NA 200 (12/20) – Notice Of Action - Multipurpose - Incl Budget

2.1.1 Overview

This section will cover the updates needed for NA 200 (12/20) form.

State Form: NA 200 (12/20)

Programs: CalWORKs, Refugee Cash Assistance

Attached Forms: N/A

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese,

Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

2.1.2 Description of Change

1. Add NA 200 (12/20) in all CalSAWS languages.
 - a. Create NA 200 (12/20) Form XDPs in English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.

Form Header: CalSAWS Standard Header

Form Title: Notice Of Action - Multipurpose - Incl Budget

Template Description: Blank Notice of Action with a formatted budget area.

Form Number: NA 200

Include NA Back 9: Yes (Include Existing NA Back 9 in CalSAWS)

Imaging Form Name: NOA - Multipurpose - Incl Budget

Imaging Document Type: Notification/NOA

Form Mockup/Example: See Supporting Document #1 (Pages 1,2)

Note:

1. Add the NA Back 9 to the back of NA 200 1st page. Attached NA 200 State forms have a different NA Back 9 version. To maintain consistency across all the forms in CalSAWS it was agreed upon to use the existing NA Back 9 (04/2013) for all forms that requires NA Back 9.
2. Update the Russian Version footer to 'No Substitute Permitted' to match other language forms.
2. CalSAWS standard footer will be used for the form.
3. Add the NA 200 (12/20) - Notice Of Action - Multipurpose - Incl Budget to Template Repository. The following parameters will be required:

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

4. Make the NA 200 (12/20) Form available to all 58 counties.
5. Add the following barcode options to the NA 200 (12/20) Form:

Tracking Barcode

BRM Barcode

Imaging Barcode

N	N	Y
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6. Add the following print options to the NA 200 (12/20) Form:

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

7. Dynamic NA 200 Form Population

Populate the DBI values on Blank form and Regular Form. Make the Fields editable.

3. Net Earnings from Self-Employment =
4. Total Disability-Based Unearned Income (DBI) (Assistance Unit + Non-Assistance Unit Members) \$
5. <DBI> DBI Disregard (if #4 is greater than) <DBI>) -
6. Nonexempt Unearned Disability-Based Income =
OR
7. Unused DBI Disregard =
8. Net Earnings from Self-Employment (from above) +
9. Total Other Earned Income +
10. Unused Amount of <DBI> (from #7) -
11. Subtotal =
12. Earned Income Disregard 50% -

Section	Field	Description	EDITABLE
NA 200 - Page 3 - Section A	<DBI>	Populate the current 'CalWORKs Disability Based Unearned Income Disregard' value from CT335_53 which is \$500 till May 31,2021 and \$550 from June 1, 2021	Y

Note: Only Farsi Version has a <DBI> field in Section 4 – Bullet 7, which should also be dynamic.

Mailing Requirements:

Mail-To (Recipient): Case Person selected on the Document parameter page

Mailed From (Return): Worker's Office Address

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

Electronic Signature: N

Post to SSP (Self Service Portal): Y

Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
	Correspondence	NA 200 (12/20)	NA200_EN.pdf NA200_SP.pdf NA200_AE.pdf NA200_AR.pdf NA200_CA.pdf NA200_CH.pdf NA200_FA.pdf NA200_KO.pdf NA200_LA.pdf NA200_HM.pdf NA200_RU.pdf

			NA200_TG.pdf NA200_VI.pdf
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218205

Conduct Central Print Test and Turn on GEN
1365 Indicator

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/24/2021	1.0	Initial Revision	Rainier Dela Cruz

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1 OVERVIEW

1.1 Current Design

SCR CA-202307 updated the GEN 1365 form to the latest version (06/17) and implemented the functionality to include the form with all correspondence generated in CalSAWS. This functionality is controlled by an indicator and is currently turned off.

1.2 Requests

Turn on the GEN 1365 functionality and conduct central print testing with the new CalSAWS print vendor.

1.3 Overview of Recommendations

1. Update the indicator to enable the GEN 1365 functionality.
2. Conduct central print testing with the new CalSAWS print vendor.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 GEN 1365

2.1.1 Overview

Turn on GEN 1365 functionality.

2.1.2 Description of Change

1. Update the indicator to enable the GEN 1365 functionality.

2.2 Central Print Testing

2.2.1 Overview

Conduct central print testing with the new CalSAWS print vendor by generating test bundles for each mailing priority and sending the bundles to the new print vendor to be printed.

2.2.2 Description of Change

1. Create a test bundle for mailing priority 0 for Los Angeles County and Migration Counties.
 - a. Generate a test bundle that consists of forms with mailing priority 0 for Los Angeles County.
 - b. Generate a test bundle that consists of forms with mailing priority 0 for the Migration Counties.
 - c. When creating the test bundle for the Migration Counties, include the SAR 7 Addendum/SAR 7/SAR 2 form.
2. Create a test bundle for mailing priority 1 for Los Angeles County and Migration Counties.
 - a. Generate a test bundle that consists of forms with mailing priority 1 and NOAs generated through EDBC for Los Angeles County.
 - b. Generate a test bundle that consists of forms with mailing priority 1 and NOAs generated through EDBC for the Migration Counties.
 - c. When creating the test bundles, include the following forms and NOAs:
 - i. MC 176 TMC (Transitional Medi-Cal Quarterly Status Report)
 - ii. MAGI NOAs (dynamic NOAs generated through EDBC)
 - iii. MC 355 (Medi-Cal Request for Information)
 - iv. MC 355 Reminder (Medi-Cal Request for Information Reminder Notice)

- v. CW 2200 (Request for Verification)
 - vi. TNB 4 Packet (TNB 4 Recertification Packet)
 - vii. CSF 170 (Text Notification Agreement)
 - viii. CSF 171 (Text Notification Cancellation Notice)
 - ix. MC 4604 (Supplemental Medi-Cal / Medicare Application)
 - x. MC 4605 (Important Information on Medi-Cal and Medicare Savings Programs)
 - xi. CSF 141 (Child Care Reimbursement Request) – Migration Counties test bundle only
 - xii. CSF 124 (Welfare-to-Work Program Attendance and Progress Report) – Migration Counties test bundle only
 - xiii. CSF 125 (Welfare-to-Work School Attendance Report) – Migration Counties test bundle only
 - xiv. CSF 126 (Travel Assistance Claim) – Migration Counties test bundle only
 - xv. CSF 127 (Return Travel Claim) – Migration Counties test bundle only
 - xvi. CSF 128 (Subsidized WEX Time and Attendance Report) – Migration Counties test bundle only
3. Create a test bundle for mailing priority 2 for Los Angeles County.
 - a. Generate a test bundle that consists of the PA 6049 (Customer Service Center ID Card form).
 4. Create a test bundle for mailing priority 3 for Los Angeles County.
 - a. Generate a test bundle that consists of the PA 320 (Vendor Service Order and Invoice) form.
 5. Create a test bundle for mailing priority 4 for Los Angeles County and Migration Counties.
 - a. Generate a test bundle that consists of Los Angeles County only packets with mailing priority 4.
 - b. Generate a test bundle that consists of Migration Counties only packets with mailing priority 4.
 - c. When generating the test bundles, include the following packets:
 - i. MAGI Redetermination Packet
 - ii. Non-MAGI Redetermination Packet
 - iii. Mixed Redetermination Packet
 - iv. CF Recertification Packet – Migration Counties test bundle only
 - v. CW Recertification Packet – Migration Counties test bundle only
 - vi. CW/CF Recertification Packet – Migration Counties test bundle only
 - vii. CF 285 (Application for CalFresh Benefits)
 6. Create a test bundle for mailing priority 7 for Los Angeles County.

- a. Generate a test bundle that consists of forms with mailing priority 7 for Los Angeles County.
7. Create a test bundle for mailing priority 9 for Los Angeles County.
 - a. Generate a test bundle that consists of the DCFS 1800 (Blue Payment Voucher) form.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.2.12	The LRS shall support the central production and mailing of notices, NOAs, forms, letters, stuffers, and flyers by program.	Conducting central print testing with the new print vendor will ensure there are no issues with the GEN 1365 and the multiple mailing priorities.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219401

Update CWS Medi-Cal
Requested Medi-Cal Types

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Feliciano-Nelson
	Reviewed By	Derek Goering, Prashant Goel, Geetha Ramalingam, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/20/2021		Draft Design	M. Feliciano
2/24/2021	1.0	Ready for Committee Review	M. Feliciano

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1 OVERVIEW

1.1 Current Design

The Medi-Cal Person Detail page displays information for an associated case and program person. The user can view the recipient information, application detail, Requested Medi-Cal Type and retroactive months information. In Edit mode, the user can update each section, including the Requested Medi-Cal Type per program person.

The System has the following Child Welfare Services (CWS) Requested Medi-Cal Types:

AAP EFC (07)
AAP Federal (03)
AAP State (04)
Child Welfare Services Medi-Cal
FC Unpaid (45)
ICPC (46)
ICAMA (06)
KG Federal (4T)
Out of State AAP (4A)

The Medi-Cal EDBC logic grants the individual the CWS aid code specified in parenthesis in the name of the Requested Medi-Cal Type.

The Requested Medi-Cal Type of 'Child Welfare Services Medi-Cal' creates a budget as 'FC/KG/AAP' for the selected individual and then the users select the appropriate Child Welfare Services aid code from the list of available Medi-Cal aid codes in EDBC override; the verification logic does not apply nor are NOAs generated.

CalSAWS is not programmed to allow an override in Medi-Cal EDBC for all the aid codes corresponding to the Child Welfare Services programs. The CWS aid codes are also unavailable in a Manual EDBC for the Medi-Cal program and on the Other Program Assistance page. This requires the user to manage these CWS Medi-Cal programs in MEDS only.

1.2 Requests

Update the Requested Medi-Cal Type Detail page to include a new field for the user to specify the associated Child Welfare Services aid code when the Requested Medi-Cal Type is 'Child Welfare Services Medi-Cal'.

Update the description for Requested Medi-Cal Type 'FC Unpaid (45)' to read, 'FC County (45)'.

Update the Medi-Cal EDBC rules to automatically grant the aid code specified by the user on the Requested Medi-Cal Type Detail page for Requested Medi-Cal Type 'Child Welfare Services Medi-Cal'.

Update the CWS aid codes to be available for the Medi-Cal program in EDBC Override, OPA and Manual EDBC.

1.3 Overview of Recommendations

1. Update the Requested Medi-Cal Type Detail page to include a new field for the user to specify the associated Child Welfare Services aid code when the Requested Medi-Cal Type is 'Child Welfare Services Medi-Cal'.
2. Update the description for aid code 45 to FC County.
3. Update rules to automatically grant aid code when Requested Medi-Cal Type 'Child Welfare Services Medi-Cal' is selected with a companion aid code from the Aid Code drop down list.
4. CWS aid codes must be available for the Medi-Cal Program in Manual Override, OPA and for Manual EDBC.

1.4 Assumptions

CWS aid codes exist in the system today and are available in MEDS.

The effort to convert the Requested Medi-Cal Type of CWS Medi-Cal in CIV will be handled in a separate SCR. (CCC-3036)

2 RECOMMENDATIONS

1. Update the Requested Medi-Cal Type Detail page to include a new field for the user to specify the associated Child Welfare Services aid code when the Requested Medi-Cal Type is 'Child Welfare Services Medi-Cal'.
2. Update the description for aid code 45 to FC County.
3. Update rules to automatically grant aid code when Requested Medi-Cal Type 'Child Welfare Services Medi-Cal' is selected with a companion aid code from the Aid Code drop down list.
4. CWS aid codes must be available for the Medi-Cal Program in Manual Override, OPA and for Manual EDBC.

2.1 Requested Medi-Cal Type Detail Page

2.1.1 Overview

Update the Requested Medi-Cal Type Detail page to include a new field for the user to specify the associated Child Welfare Services aid code when the Requested Medi-Cal Type is 'Child Welfare Services Medi-Cal'

Update the description for aid code 45 to FC (County).

2.1.2 Requested Medi-Cal Type Detail Mockup

The mockup shows a web interface for 'Requested Medi-Cal Type Detail'. It features a top navigation bar with tabs for 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The main content area has a heading 'Requested Medi-Cal Type Detail' and a legend indicating that an asterisk (*) denotes required fields. Below this, there are 'Save and Return' and 'Cancel' buttons. A section titled 'Requested Medi-Cal Type Information' contains four input fields: 'Requested Medi-Cal Type:' (a dropdown menu with 'Child Welfare Services Medi-Cal' selected), 'Aid Code' (a dropdown menu with '- Select -' selected), 'Begin Month:' (a date picker), and 'End Month:' (a date picker). At the bottom of this section, there are 'Save and Return' and 'Cancel' buttons.

Figure 2.1.1 – Requested Medi-Cal Type Detail

2.1.3 Description of Changes

1. Update the Requested Medi-Cal Type Detail page as follows:
 - a. Add a label named 'Aid Code' between the 'Requested Medi-Cal Type' label and the 'Begin Month' label
2. Display aid codes (CT_184) where Primary Program is AAP, KG and FC and Second Program is MC OR Aid Code 06, 4A and 46

Technical Note: Primary Program is REFER_TABLE 5_DESCR; Second Program is REFER_TABLE 15_DESCR

- a. Dynamically display the 'Aid Code' label and drop down when the user selects 'Child Welfare Services Medi-Cal' Requested Medi-Cal Type; do not show for any other Requested Medi-Cal Type.
3. Update the description for Requested Medi-Cal Type (CT_319) 'FC Unpaid (45)' to 'FC County (45)'.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Medi-Cal Detail → Program Person hyperlink → Medi-Cal Person Detail → Requested Medi-Cal Type Detail**

2.1.5 Security Updates

No updates

2.1.6 Page Mapping

No updates

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Medi-Cal EDBC Rules

2.2.1 Overview

Update Medi-Cal EDBC rules to automatically grant the CWS Medi-Cal aid code when user selects 'Child Welfare Services Medi-Cal' Requested Medi-Cal Type and an aid code from the 'Aid Code' drop down menu.

CWS aid codes must be available for the Medi-Cal Program in Manual Override, OPA and for Manual EDBC.

2.2.2 Description of Changes

1. Update Medi-Cal EDBC rules logic for 'Child Welfare Services Medi-Cal' Requested Medi-Cal Type to determine the appropriate aid code based on the aid code selected in the Requested Medi-Cal Type Detail page effective for the benefit month. Continue current logic if no aid code is selected.

Technical Note: Medi-Cal EDBC will continue to use the budget as "FC/KG/AAP"

2. Update the code table for aid codes (CT 184) as follows:

Aid Code	Primary Program	Second Program	Valid for Override	Valid for OPA	Valid for Manual EDBC
03- AAP Fed	AA	MC	Y	Y	Y
04- AAP State	AA	MC	Y	Y	Y
06- ICAMA	MC		Y	Y	Y
07- AAP-Extended-Fed	AA	MC	Y	Y	Y
40- AFDC-FC (State)	FC	MC	Y	Y	Y
42- AFDC-FC (Fed)	FC	MC	Y	Y	Y
43- FC Extended (State)	FC	MC	Y	Y	Y
45- FC (County)	FC	MC	Y	Y	Y
46- ICPC	MC		Y		
49- FC Extended (Federal)	FC	MC	Y	Y	Y
4T- Kin-GAP (Fed)	KG	MC	Y	Y	Y
4A- Out of State AAP	MC		Y	Y	Y
5K- FC-EA	FC	MC	Y	Y	Y
2P- ARC only	FC	MC	Y	Y	Y
2R- ARC only for NMD	FC	MC	Y	Y	Y
2S- ARC - Fed CW	FC	MC	Y	Y	Y
2T- ARC - State CW	FC	MC	Y	Y	Y
2U- ARC - State CW for NMD	FC	MC	Y	Y	Y
4F- Kin-GAP (State)	KG	MC	Y	Y	Y

4G- Kin-GAP (State) beyond age 18 due to a disability	KG	MC	Y	Y	Y
4S- Kin-GAP Extended (Fed)	KG	MC	Y	Y	Y
4T- Kin-GAP (Fed)	KG	MC	Y	Y	Y
4W - Kin-GAP Extended (State)	KG	MC	Y	Y	Y

Note: Blue denotes existing values and logic. Black are the requested updates.

2.2.3 Programs Impacted

Medi-Cal

2.2.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8	The LRS shall fully automate the accurate determination of eligibility for public assistance programs. All program and sub-program determinations shall be made independently of each other. The LRS shall also automate the calculation of the amount benefits, based on the determination of eligibility and in compliance with all applicable federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures. The LRS shall include independent Web services for eligibility determination and independent Web services for benefit calculation, which shall be available to COUNTY-specified entities (e.g., other California SAWS systems) via LANet/EN and the Internet.	CalSAWS has appropriate aid codes for CWS Medi-Cal eligibility.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-222369

Update Batch jobs for Foster Care program
when NMD turns 21

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/3/2021	1.0	Initial Design	Sowmya Coppisetty

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1 OVERVIEW

The purpose of this SCR is to update the EDBC batch sweep job JB00E907D to exclude Foster Care programs with aid code '45 - FC (County)' and when the 'Use County Funds' flag on the Child Placement Detail page is set to 'Yes' and to turn on batch jobs JB00E906D and JB00E907D.

1.1 Current Design

As part of SCR CA-201036 two new Batch EDBC sweep jobs were introduced to trigger EDBC for the Foster program one day before the Non-Minor Dependent (NMD) turns 21 years of age.

1. JB00E906D: This EDBC batch sweep job is triggered for the Foster Care program one day before the NMD turns 21 years of age to prorate the benefit for the current month
2. JB00E907D: This EDBC batch sweep job is triggered for the Foster Care program one day before the NMD turns 21 years of age to discontinue the program effective the following month

With SCR CA-214267, EDBC rules were updated to determine the aid code '45 – FC (County)' when the 'Use County Funds' indicator is 'Yes' on the Child Placement Detail page, when the county opts to pay County Funds for NMDs over 21 years of age, such as due to appeals or court delays.

1.2 Requests

Update Batch jobs related to NMDs turning 21 years of age.

1.3 Overview of Recommendations

1. Modify EDBC Batch sweep job JB00E907D to exclude Foster Care programs where aid code is '45 – FC (County)' and when the 'Use County Funds' indicator is set to 'Yes' on the Child Placement Detail page.
2. Turn on Batch jobs JB00E906D and JB00E907D.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Modify Batch job JB00E907D and Turn on Batch jobs JB00E906D and JB00E907D

2.1.1 Overview

Add the condition to the batch EDBC sweep job 'JB00E907D' to exclude Foster Care programs where the aid code is '45 – FC (County)' and when the 'Use County Funds' indicator is set to 'Yes' on the Child Placement Detail page.

Turn on the below 2 batch jobs created as part of SCR CA-201036:

- JB00E906D: This EDBC batch sweep job is triggered for the Foster Care program one day before the NMD turns 21 years of age to prorate the benefit for the current month
- JB00E907D: This EDBC batch sweep job is triggered for the Foster Care program one day before the NMD turns 21 years of age to discontinue the program effective the following month

2.1.2 Description of Change

1. Add the below condition to the existing driving query of the batch EDBC sweep job 'JB00E907D' to exclude Foster Care programs when:
 - a. Aid code of FC program is '45 – FC (County)' and
 - b. 'Use County Funds' indicator is set to 'Yes' on the Child Placement Detail page
2. Create a BSCR to schedule and turn on Batch jobs JB00E906D and JB00E907D.

Note: The batch EDBC sweep job JB00E906D is triggered for the Foster Care programs one day before the NMD turns 21 years of age to prorate the benefit for the current month and if the Foster Care program meets the criteria introduced with CA-214267, Aid Code '45 – FC (County)' will be assigned.

2.1.3 Execution Frequency

Daily

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

All Counties

2.1.6 Data Volume/Performance

Unknown.

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 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.14	The LRS shall determine which individuals must be included in the eligibility determination and take appropriate action(s), based on program rules.	Update batch job JB00E907D to skip discontinuance for Foster Care program where aid code is '45 – FC (County)' and when the 'Use County Funds' indicator is 'Yes' on the Child Placement Detail page

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-223586

NA BACK 9 Legal Aid Address Updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tiffany Huckaby
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/04/2021	0.1	Initial Design	Tiffany Huckaby
03/23/2021	0.2	Minor cosmetic/formatting updates	Amy Gill

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1 OVERVIEW

This effort is updating the Legal Aid Address section on the CalSAWS NA BACK 9 to make it large enough to contain the Legal Aid Addresses for migration counties.

1.1 Current Design

Currently the Legal Aid Address sections on the NA BACK 9 Form and NA BACK 9 NOA versions only hold between 5 and 6 lines of county information which is large enough to populate the Legal Aid Address for Los Angeles County. Currently there are potentially seven lines of information that can be used for a Legal Aid Address.

1.2 Requests

Update the NA BACK 9 Form and NOA versions to include space for the following lines of information for the Legal Aid Address:

- Contact Name
- Organization
- Address Line One
- Address Line Two
- City, State, Zip
- Primary Phone Number / Fax
- Toll Free Phone Number

1.3 Overview of Recommendations

Update the following NA BACK 9 versions that exist in CalSAWS to include enough space to populate all possible Legal Aid Address information:

- CMSP Form NA BACK 9
- DCFS NA BACK 9
- GA/GR NA BACK 9
- MAGI NA BACK 9 for Forms
- MAGI NA BACK 9 for NOAs
- NA BACK 9 for NOAs
- NA BACK 9 for CSF 165
- Template Repository NA BACK 9

1.4 Assumptions

1. This effort is only updating the NA BACK 9. No other Forms/NOAs will be updated with this effort.
2. This effort is only updating the space to populate the Legal Aid Address. No other updates to the NA BACK 9 will be implemented with this effort.
3. This effort is not updating the CMSP Legal Back for dynamically generated NOAs via EDBC. Currently this NOA Fragment expands to fit the size of the Legal Aid Address.

2 RECOMMENDATIONS

2.1 Update CMSP NA Back 9 for Forms

This recommendation will update the CMSP Forms NA BACK 9 version.

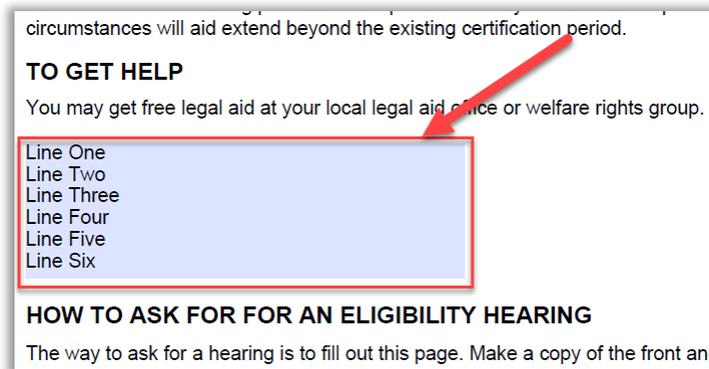
2.1.1 Overview

Currently the CMSP NA BACK 9 generates with CMSP Forms that are available in the Template Repository (CMSP100, CMSP239A, CMSP239B). It currently only has space for six lines of information for the Legal Aid Address.

State Form: NA BACK 9

Current Programs: MC - CMSP

Existing Languages: English and Spanish



circumstances will aid extend beyond the existing certification period.

TO GET HELP

You may get free legal aid at your local legal aid office or welfare rights group.

Line One
Line Two
Line Three
Line Four
Line Five
Line Six

HOW TO ASK FOR FOR AN ELIGIBILITY HEARING

The way to ask for a hearing is to fill out this page. Make a copy of the front and

A red arrow points to the six-line text input field, and a red box highlights the lines.

2.1.2 Description of Change

2.1.2.1 Updates to Form XDP

Update the CMSP NA BACK (CMSP_NA_BACK9) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

Updated Languages: English and Spanish

the same until the hearing process is completed or until your certification period circumstances will aid extend beyond the existing certification period.

TO GET HELP

You may get free legal aid at your local legal aid office or welfare rights group.

Contact Name
Organization
Address Line One
Address Line Two
City, State, Zip
Primary Phone Number / Fax
Toll Free Phone Number

HOW TO ASK FOR FOR AN ELIGIBILITY HEARING

2.2 Update DCFS NA Back 9

This recommendation will update the DCFS NA BACK 9 version.

2.2.1 Overview

Currently the DCFS NA BACK 9 generates with the AAP, Foster Care, and Kin-GAP NOAs. It also generates with Forms RFA100 and RFA100A. It currently only has space for five lines of information for the Legal Aid Address.

State Form: NA BACK 9

Current Programs: AAP, FC, KG

Existing Languages: English and Spanish

<p>YOUR HEARING RIGHTS You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none">• Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.• Your Child Care Services may stay the same while you wait for a hearing.• Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier. <p>If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh <input type="checkbox"/> Child Care</p> <p>While You Wait for a Hearing Decision for: Welfare to Work: You do not have to take part in the activities.</p> <p>You may receive child care payments for employment and for activities approved by the county before this notice.</p> <p>If we told you your other supportive services payments will stop, you will not get any more payments, even if you go to your activity.</p>	<p>TO ASK FOR A HEARING:</p> <ul style="list-style-type: none">• Fill out this page.• Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.• Send or take this page to: <p>_____</p> <p>OR</p> <ul style="list-style-type: none">• Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349. <p>To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.</p> <p>Line One Line Two Line Three Line Four Line Five</p> <p>_____</p> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p> <p>HEARING REQUEST</p>
--	--

2.2.2 Description of Change

2.2.2.1 Updates to Form XDP

Update the DCFS NA BACK (NA_BACK9_DCFS_FRAGMENT, ID: 671) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

Updated Languages: English and Spanish

YOUR HEARING RIGHTS
You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:

Yes, lower or stop: Cash Aid CalFresh Child Care

While You Wait for a Hearing Decision for:
Welfare to Work:
You do not have to take part in the activities.

You may receive child care payments for employment and for activities approved by the county before this notice.

If we told you your other supportive services payments will stop, you will not get any more payments, even if you go to your activity.

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

OR

- Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Contact Name
Organization
AddrLine1
AddrLine2
city, State, Zip
primaryPhoneNumber / Fax
tollFreePhoneNumber

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

HEARING REQUEST

2.3 Update GA/GR NA Back 9

This recommendation will update the GA/GR NA BACK 9 version.

2.3.1 Overview

Currently the GA/GR NA BACK 9 generates with the GA/GR NOAs from the Template Repository (CSF106, CSF107, CSF108, CSF109, CSF110, CSF111). It currently only has space for five lines of information for the Legal Aid Address.

State Form: N/A, created from County feedback

Current Programs: GA/GR

Existing Languages: English and Spanish

• Fill out this page.
 • Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
 • Send or take this page to:

OR
 • Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Line One
 Line Two
 Line Three
 Line Four
 Line Five

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

BIRTH DATE	PHONE NUMBER
STREET ADDRESS	
CITY	STATE ZIP CODE
SIGNATURE	DATE
NAME OF PERSON COMPLETING THIS FORM	PHONE NUMBER
<input type="checkbox"/> I want the person named below to represent me at this hearing. I give my permission for this person to see my records or go to the hearing for me. (This person can be a friend or relative but cannot interpret for you.)	
NAME	PHONE NUMBER
STREET ADDRESS	
CITY	STATE ZIP CODE

2.3.2 Description of Change

2.3.2.1 Updates to Form XDP

Update the GA/GR NA BACK (NA_BACK9_FRAGMENT_GAGR) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

Updated Languages: English and Spanish

• Fill out this page.
 • Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
 • Send or take this page to:

OR
 • Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Contact Name
 Organization
 AddrLine1
 AddrLine2
 city, State, Zip
 primaryPhoneNumber / Fax
 tollFreePhoneNumber

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

BIRTH DATE	PHONE NUMBER
STREET ADDRESS	
CITY	STATE ZIP CODE
SIGNATURE	DATE
NAME OF PERSON COMPLETING THIS FORM	PHONE NUMBER
<input type="checkbox"/> I want the person named below to represent me at this hearing. I give my permission for this person to see my records or go to the hearing for me. (This person can be a friend or relative but cannot interpret for you.)	
NAME	PHONE NUMBER
STREET ADDRESS	
CITY	STATE ZIP CODE

2.4 Update MAGI NOA NA Back 9

This recommendation will update the MAGI NOA NA BACK 9 version.

2.4.1 Overview

Currently the MAGI NA BACK 9 generates with the dynamically generated MAGI NOAs from EDBC. It currently only has space for four lines of information for the Legal Aid Address.

State Form: NA BACK 9

Current Programs: MC - MAGI

Existing Languages: Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

YOUR HEARING RIGHTS
You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:
Yes, lower or stop: Cash Aid CalFresh Child Care

While You Wait for a Hearing Decision for:
Welfare to Work:
You do not have to take part in the activities.
You may receive child care payments for employment and for activities approved by the county before this notice.

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:
California Department of Social Services
State Hearings Division, ACAB
744 P Street, MS 9-17-97
Sacramento, CA 95814

OR

- Call toll free: 1-855-795-0634 toll free, 1-800-952-8349 TDD, 1-916-651-2789 Fax

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Line One
Line Two
Line Three
Line Four

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

HEARING REQUEST

2.4.2 Description of Change

2.4.2.1 Updates to Form XDP

Update the MAGI NOA NA BACK (NA_BACK_9_MAGI_FRAGMENT, ID: 672) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

Updated Languages: Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

YOUR HEARING RIGHTS
 You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:
 Yes, lower or stop: Cash Aid CalFresh Child Care

While You Wait for a Hearing Decision for:
Welfare to Work:
 You do not have to take part in the activities.
 You may receive child care payments for employment and for activities approved by the county before this notice.
 If we told you your other supportive services payments will stop

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:
 California Department of Social Services
 State Hearings Division, ACAB
 744 P Street, MS 9-17-97
 Sacramento, CA 95814
 OR
 Call toll free: 1-855-795-0634 toll free, 1-800-952-8349 TDD, 1-916-651-2789 Fax

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Contact Name
 Organization
 AddrLine1
 AddrLine2
 city, State, Zip
 primaryPhoneNumber / Fax
 tollFreePhoneNumber

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

HEARING REQUEST

2.5 Update MAGI NA Back 9

This recommendation will update the MAGI NA BACK 9 version that generates for the CSF143.

2.5.1 Overview

Currently the MAGI NA BACK 9 generates with the CSF143. It currently only has space for six lines of information for the Legal Aid Address.

State Form: NA BACK 9

Current Programs: MC - MAGI

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

<p>YOUR HEARING RIGHTS You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"> Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing. Your Child Care Services may stay the same while you wait for a hearing. Your CalFresh benefits will stay the same until the hearing or the end of your certification period, whichever is earlier. <p>If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh <input type="checkbox"/> Child Care</p>	<p>TO ASK FOR A HEARING:</p> <ul style="list-style-type: none"> Fill out this page. Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page. Send or take this page to: California Department of Social Services State Hearings Division, ACAB 744 P Street, MS 9-17-97 Sacramento, CA 95814 <p>OR fax to 1-916-651-2789</p> <ul style="list-style-type: none"> Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8349. <p>To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.</p> <div style="border: 1px solid red; padding: 2px;"> Line One Line Two Line Three Line Four Line Five Line Six </div> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p> <p style="text-align: right;">HEARING REQUEST</p>
--	---

2.5.2 Description of Change

2.5.2.1 Updates to Form XDP

Update the MAGI NA BACK (NA_BACK9_MAGI_FRAG) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

<p>YOUR HEARING RIGHTS You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"> Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing. Your Child Care Services may stay the same while you wait for a hearing. Your CalFresh benefits will stay the same until the hearing or the end of your certification period, whichever is earlier. <p>If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh <input type="checkbox"/> Child Care</p>	<p>TO ASK FOR A HEARING:</p> <ul style="list-style-type: none"> Fill out this page. Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page. Send or take this page to: California Department of Social Services State Hearings Division, ACAB 744 P Street, MS 9-17-97 Sacramento, CA 95814 <p>OR fax to 1-916-651-2789</p> <ul style="list-style-type: none"> Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8349. <p>To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.</p> <div style="border: 1px solid red; padding: 2px;"> Contact Name Organization Address Line One Address Line Two City, State, Zip Primary Phone Number / Fax Toll Free Phone Number </div> <p>If you do not want to go to the hearing alone, you can bring</p>
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2.6 Update NA Back 9 for NOAs

This recommendation will update the NA BACK 9 version that generates on NOAs via EDBC.

2.6.1 Overview

Currently this version of the NA BACK 9 is the default NA BACK 9 fragment for NOAs that generate via EDBC. It also generates on Forms from the Template Repository (CSF107, CSF108, CSF109, CSF110, CSF111, NA1277). It currently only has space for six lines of information for the Legal Aid Address.

State Form: NA BACK 9

Current Programs: MC, CF, SNB/TNB, CW, RCA, CAPI

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

<p>YOUR HEARING RIGHTS You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"> Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing. Your Child Care Services may stay the same while you wait for a hearing. Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier. <p>If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh <input type="checkbox"/> Child Care</p> <p>While You Wait for a Hearing Decision for: Welfare to Work: You do not have to take part in the activities.</p> <p>You may receive child care payments for employment and for activities approved by the county before this notice.</p>	<p>TO ASK FOR A HEARING:</p> <ul style="list-style-type: none"> Fill out this page. Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page. Send or take this page to: <p>OR</p> <ul style="list-style-type: none"> Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349. <p>To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.</p> <div style="border: 1px solid black; padding: 2px;"> <p>Line One Line Two Line Three Line Four Line Five Line Six</p> </div> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p>
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2.6.2 Description of Change

2.6.2.1 Updates to Form XDP

Update the NA BACK (NA_BACK9_FRAGMENT, ID: 670) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

YOUR HEARING RIGHTS
 You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us know if you want to lower or stop your benefits before the hearing check below:

Yes, lower or stop: Cash Aid CalFresh Child Care

While You Wait for a Hearing Decision for: Welfare to Work:
 You do not have to take part in the activities.

You may receive child care payments for employment and for activities approved by the county before this notice.

If we told you your other supportive services payments will stop, you will

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

OR

- Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Contact Name
 Organization
 Address Line One
 Address Line Two
 City, State, Zip
 Primary Phone Number / Fax
 Toll Free Phone Number

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

HEARING REQUEST

2.7 Update NA Back 9 for CSF165

This recommendation will update the NA BACK 9 version that generates on the CSF165.

2.7.1 Overview

Currently this version of the NA BACK 9 generates on the CSF165. It currently only has space for six lines of information for the Legal Aid Address.

State Form: NA BACK 9

Current Programs: MC

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

YOUR HEARING RIGHTS
 You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us know if you want to lower or stop your benefits before the hearing check below:

Yes, lower or stop: Cash Aid CalFresh Child Care

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

California Department of Social Services
 State Hearings Division, ACAB
 744 P Street, MS 9-17-97
 Sacramento, CA 95814

OR fax to 1-916-651-2789

- Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Line One
 Line Two
 Line Three
 Line Four
 Line Five
 Line Six

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

HEARING REQUEST

2.7.2 Description of Change

2.7.2.1 Updates to Form XDP

Update the NA BACK (NA_BACK9_NOAFF) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

YOUR HEARING RIGHTS
You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:

Yes, lower or stop: Cash Aid CalFresh Child Care

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:
California Department of Social Services
State Hearings Division, ACAB
744 P Street, MS 9-17-97
Sacramento, CA 95814
OR fax to 1-916-651-2789
- Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Contact Name
Organization
Address Line One
Address Line Two
City, State, Zip
Primary Phone Number / Fax
Toll Free Phone Number

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

2.8 Update NA Back 9 for Template Repository

This recommendation will update the NA BACK 9 version that generates on Forms available in the Template Repository.

2.8.1 Overview

Currently this version of the NA BACK 9 is the default NA BACK 9 for Forms generated from the Template Repository. It currently only has space for five lines of information for the Legal Aid Address.

See Supporting Documents #1 for list of Forms that use this version of the NA BACK 9.

State Form: NA BACK 9

Current Programs: MC, CF, CW, CL, WTW

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

YOUR HEARING RIGHTS
 You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:

Yes, lower or stop: Cash Aid CalFresh Child Care

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

OR

- Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Line One
 Line Two
 Line Three
 Line Four
 Line Five

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

2.8.2 Description of Change

2.8.2.1 Updates to Form XDP

Update the NA BACK (NA_BACK9_FRAG) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

YOUR HEARING RIGHTS
 You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:

Yes, lower or stop: Cash Aid CalFresh Child Care

While You Wait for a Hearing Decision for:
 Welfare to Work:

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

OR

- Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Contact Name
 Organization
 Address Line One
 Address Line Two
 City, State, Zip
 Primary Phone Number / Fax
 Toll Free Phone Number

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

HEARING REQUEST
 I want a hearing due to an action by the Welfare Department of

2.9 Update NA BACK 9 Variable Population for Legal Aid Address

2.9.1 Overview

The Legal Aid Address population for the NA BACK 9 NOA fragments and Forms need to consistently add the required fields for the Legal Aid Address.

2.9.2 Description of Change

Update the NOA and Form logic to add the following existing fields (DOC_DATA) to the NA BACK 9 versions in the previous recommendations.

- Contact Name
- Organization
- Address Line One
- Address Line Two
- City, State, Zip
- Primary Phone Number / Fax
- Toll Free Phone Number

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	Recommendation 2.8 Forms that use generic NA BACK 9	See CA-223586 Recommendation 2-8 Form Listing.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.7 (CAR-1211)	The LRS shall include reference to the local legal aid office and administrative hearing/appeals office on the reverse side of NOAs, based on program.	This update is to allow for Legal Aid Addresses to appropriately display for all counties on the reverse side of NOAs (NA Back9).

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-223955

Update the Local Navigation to Reduce the
Size

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	Matt Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/19/2021	1.0	Initial Draft	Connor O'Donnell

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6	Outreach.....	Error! Bookmark not defined.
	6.1 Lists.....	Error! Bookmark not defined.
7	Appendix.....	Error! Bookmark not defined.

1 OVERVIEW

Certain Local Navigation options have enough possible selections to make the dropdown list extend past the bottom of the screen when using smaller resolutions. To ensure that all dropdown options are selectable the white space surrounding each selection will be reduced and a scrollbar will be added to the dropdown menu.

1.1 Current Design

The Local Navigation is navigated to by hovering over a Global Navigation Item.

1.2 Requests

The 'Empl. Services' and 'Special Units' Local Navigation options count is making it difficult to select some items without changing the screen resolution or browser zoom.

1.3 Overview of Recommendations

1. Update the Local Navigation to have a lower vertical height and implement a scroll bar

1.4 Assumptions

1. N/A

2 RECOMMENDATIONS

2.1 Local Navigation

2.1.1 Overview

In order to allow all local navigation options to be viewed and selected the vertical white space will be shrunk, and a scrollbar will be added to the local navigation dropdown selection.

2.1.2 Local Navigation Mockup

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
Case Summary						SSIAP Workload Inventory			
Case Name Case Name						County Los Angeles	Referral Inventory		
Companion Cases						Hearings			
Case Number						Case Name	GR/GROW Hearings		
Display: <input type="text" value="02/01/2021"/> <input type="button" value="View"/>						ADH			
CalFresh						Special Investigations		<input type="button" value="Add"/>	
General Assistance/General Relief						Quality Review			
Medi-Cal						Error Prone			
						IEVS Abstracts			
						WPR Sample			
						SFIS Search			
						SSIAP			
						NPP File List			
All People Associated with the Case									
Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status		
JUNIE BOWNE	10/05/1994	26	M	846-92-4789	05693868D	01	In the Home		

Figure 2.1.1 – Local Navigation (White Space)

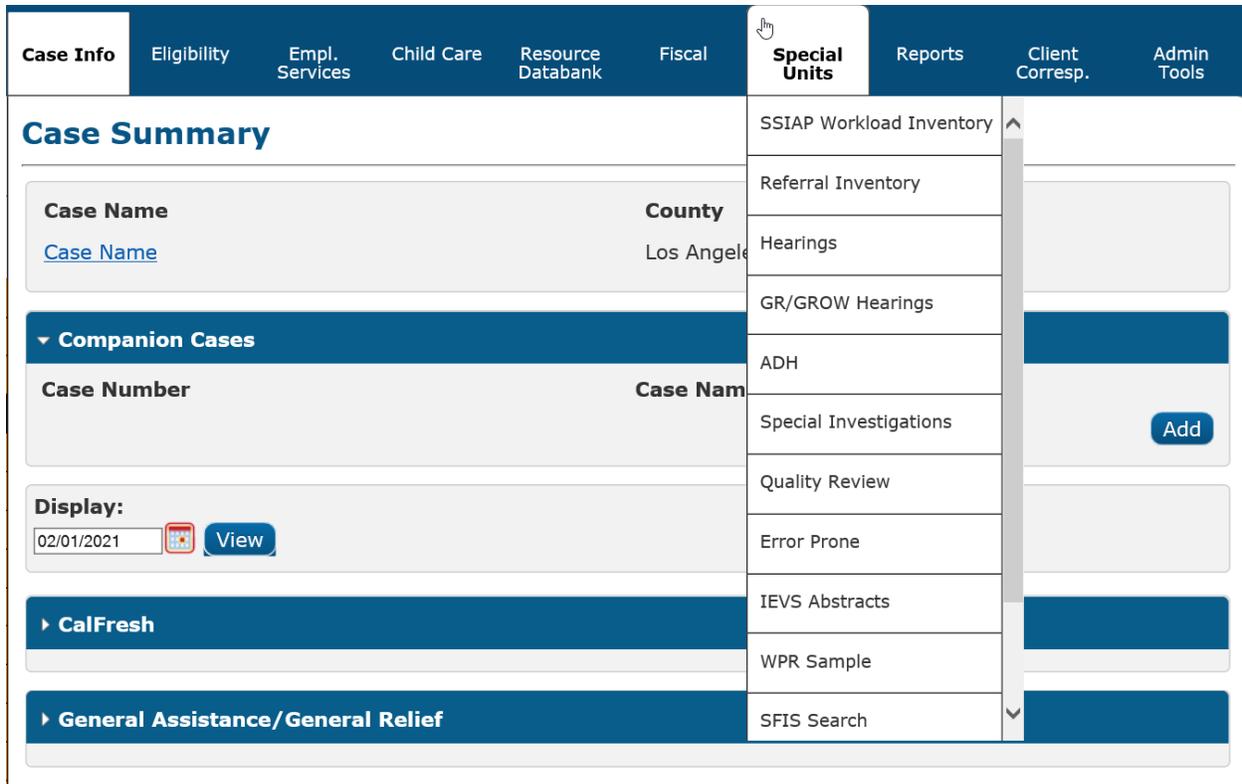


Figure 2.1.1 – Local Navigation (Scrollbar)

2.1.3 Description of Changes

1. Shrink the size of the Local Navigation entries by reducing vertical white space.
 - a. Change 'padding-top' in a.localNavEntry from 18px to 14px.
 - b. Change 'padding-bottom' in a.localNavEntry from 2px to 0px.
2. Add a scrollbar to the dropdown list of Local Navigation entries
 - a. This scrollbar will appear when the length of the dropdown list would exceed 75% of the window height.

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.1.3.1	The LRS shall include tools for the User interface development that allow the reuse of User interface components and enforce a consistent look and feel across the LRS Application Software.	The Local Navigation changes are reused across the application. The changes here support growth of the application.

CalSAWS

California Statewide Automated Welfare System

Design Documents

CA-224183

Add BRM for Forms using Prepaid/Non-Prepaid
Envelopes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/04/2021	1.0	Original	Nithya Chereddy
03/31/2021	1.1	Adding Imaging details for forms	Nithya Chereddy

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1 OVERVIEW

The purpose of this change is to add Business Reply Mail (BRM) envelopes for the forms which currently use Prepaid/Non-Prepaid envelopes in Los Angeles County.

The forms in CalSAWS are assigned a priority number. Priority 6 forms currently use a Pre-Paid envelope and Priority 7 forms currently use a Non-Prepaid envelope.

1.1 Current Design

Certain forms in CalSAWS (Priority 6 and Priority 7) are currently mailed out with a Prepaid/Non-Prepaid envelopes.

1.2 Requests

1. Add the BRM envelope to specified Priority 6 and Priority 7 forms, which are currently mailed out with Prepaid and Non-Prepaid envelopes.
2. Update the priority of the specified forms to Priority 1.
3. Add Imaging Details for forms which are missing Imaging Barcode.

1.3 Overview of Recommendations

1. Add the BRM envelope to the below listed Priority 6/Priority 7 forms.
 - a. CAL 11 - Cal-Learn Notice of Incomplete Grades
 - b. CF 303 - Replacement or Disaster Supplement Affidavit
 - c. PA 528 - Statement of Responsible Relative
 - d. ABPSSI-1 - General Relief Request for SSI / SSP Application Information
 - e. SOC 807 - CAPI Request for Waiver of Overpayment Recovery - Income/Expenses
 - f. WTW EOA1 - CALWORKS EDUCATIONAL OPPORTUNITY AND ATTAINMENT (EOA) PROGRAM APPLICATION FORM
 - g. CW 25 - Supplemental Statement of Facts - Minor Parent
 - h. CW 1725 - School Attendance / Enrollment Verification
2. Update the above listed Priority 6 and Priority 7 forms to Priority 1 and route them back to the Centralized/District addresses.

Note: Priority 1 was initially used for standard mail envelopes without a return envelope. As of the SCR CA-201214, which was implemented in 20.11 release, Priority 1 was updated to accommodate standard mail envelopes with/without BRM return envelope.
3. Update the Priority of the MC 194, SOC 814 and CW 82 forms to Priority 1.

Note: These are currently Print Local only forms.
4. Add Imaging Barcode for the forms listed in Supporting Document 10.

1.4 Assumptions

1. BRM addresses for C-IV Migration counties were added to CalSAWS with CA-201214. SCR CA-217127 will migrate BRM addresses for CalWIN Migration counties.
2. Form versions are not being updated with this SCR.
3. New threshold language forms will not be added with this SCR.
4. Mock office data will be used for testing C-IV BRM addresses.
5. The bundling job is only available for Los Angeles County currently. The bundling jobs for the Migration Counties are being migrated with **SCR CA-207312**.
6. The forms listed in this SCR currently do not include a BRM envelope. This SCR adds a BRM header and BRM envelope to these forms. After this SCR goes live, workers should only reprint these forms locally, this condition is only for the forms that were generated before the go live date of this SCR. Reprinting centrally will error out the forms that were generated before the go live date of this SCR. Reprint centrally and Reprint locally options will function the same way as they function today for the forms listed in this SCR that are generated after this SCR goes live.

Scenario 1: Form will error out if the form is generated on 07/20/2021, SCR goes live on 07/26/2021 and the worker is trying to reprint the form centrally on 08/11/2020.

Scenario 2: Form will not error out if the form is generated on 08/01/2021, and the worker is trying to reprint the form locally/centrally on 08/08/2021.

7. SCR CA-215143 will replace the PA 1725 form with CW 1725.
8. The same routing logic listed in this SCR will apply for both DCFS and DPSS programs.
9. If correspondence is generated from a district office for which the BRM mapping is not available, then the form will exception out and it will be part of the exception report.
10. Correspondence could be generated from a non-district office. If the non-district office is tied to a district office, the office relationship can be viewed in Admin -> Office Admin -> Office -> Office Detail -> Office Relationship. Below is the screenshot

Office Relationship		
Office 1	Type	Office 2
GAIN - EL MONTE 04	4 - GAIN to GAIN Region's Cashier Office	GAIN - SAN GABRIEL VALLEY REG

11. If correspondence is generated from a non-district office which is not tied to a district address, then the form will exception out and it will be part of the exception report.
12. Form will exception out if it is generated from a non-district office which is tied to a district office, but the BRM mapping is not available for the district office.

13. A non-district office could be tied to multiple district offices. In such case a random district office will be picked to find the BRM mapping.

2 RECOMMENDATIONS

2.1 Add BRM envelopes to Forms

2.1.1 Overview

The forms listed in the below section are currently mailed out with Prepaid/Non-Prepaid envelopes.

2.1.2 Description of Change

1. Add the BRM envelope to the below listed forms.
2. Update the Priority number for the below listed forms to Priority 1.

No.	Form Number	Form Title	Languages Available	Existing Priority - Envelope type
1.	CAL 11	Cal-Learn Notice of Incomplete Grades	EN	6 – Prepaid
2.	CF 303	Replacement or Disaster Supplement Affidavit	EN, SP	6 – Prepaid
3.	PA 528	Statement of Responsible Relative	EN, SP, AE, CA, CH, TG, KO, RU, VI	6 – Prepaid
4.	ABPSSI-1	General Relief Request for SSI / SSP Application Information	EN	6 – Prepaid
5.	SOC 807	CAPI Request for Waiver of Overpayment Recovery - Income/Expenses	EN	7 – Non-Prepaid
6.	WTW EOA1	CALWORKS EDUCATIONAL OPPORTUNITY AND ATTAINMENT (EOA) PROGRAM APPLICATION FORM	EN	7 – Non-Prepaid
7.	CW 25	Supplemental Statement of Facts - Minor Parent	EN, SP, CA, CH, RU, VI	7 – Non-Prepaid

No.	Form Number	Form Title	Languages Available	Existing Priority - Envelope type
8.	CW 1725	School Attendance/Enrollment Verification	EN, SP	7 – Non-Prepaid

See Supporting Documents #1 through #8 for Mockups

2.2 Route Forms to Centralized Location/District Office Address

2.2.1 Overview

Priority 6 and Priority 7 forms currently do not have a BRM envelope. With this effort the priority for these forms will be updated to Priority 1 and a BRM envelope will be added to these forms.

2.2.2 Description of Change

1. Route the forms (listed in section 2.1.2) to the Expo Park location for the below listed District Offices for Los Angeles County.

Centralized office address for Expo Park:

DPSS – CSU EXPO PARK
 3833 S VERMONT AVE
 LOS ANGELES CA 90037-9920

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Belvedere	05
2.	Southwest Special	08
3.	West Valley	82
4.	East Valley	11
5.	Metro Special Office	70
6.	San Fernando Branch	32
7.	Metro Family	13
8.	Pasadena	03
9.	Wilshire Special Office	10
10.	Glendale	02

11.	Santa Clarita Branch	51
12.	Lancaster	34
13.	Lancaster General Relief Office	67

- Route the forms (listed in section 2.1.2) to the San Gabriel/El Monte Centralized location for the below listed District Offices for Los Angeles County.

Centralized office address for San Gabriel/El Monte:

DPSS – CSU EL MONTE/SAN GABRIEL
 3400 AERO JET AVE
 EL MONTE CA 91731-9935

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Pomona	36
2.	Metro East	15
3.	Cudahy	06
4.	Compton	26
5.	Norwalk	40
6.	Southwest Family	83
7.	El Monte (San Gab. V. Serv. Center)	04
8.	San Gabriel Valley	20
9.	Lincoln Heights	66
10.	Child Medi-Cal Enroll. Project	16
11.	Management Information Evaluation	L6

- Route the forms (listed in section 2.1.2) to the La Cienega Centralized location for the below listed District Offices for Los Angeles County.

Centralized office address for La Cienega:

DPSS – CSU LA CIENEGA
 9800 S LA CIENEGA BLVD FL 11
 INGLEWOOD CA 90301-9958

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
--------	----------------------	---

1.	Exposition Park Family Service Center	12
2.	Florence	17
3.	South Central	27
4.	South Special	07
5.	South Family	31
6.	Metro North Office	38
7.	Rancho Park	60
8.	Paramount Office	62
9.	Civic Center	14
10.	Long Term Care	80

4. For the C-IV Migration counties, populate the centralized office information on the BRM header if the county has a centralized location and populate the district office information on the BRM header if the county does not have a centralized location.

Technical Note: CT15 REFER_TABLE_19_DESCR has the information of whether a County has a Centralized or Non-Centralized office.

2.3 Update Priority for the Print Local Only Forms

2.3.1 Overview

The forms MC 194, SOC 814 generate with Priority 6 and CW 82 generate with Priority 7. These forms can only be printed locally as per existing functionality.

2.3.2 Description of change

Update the priority for MC 194, SOC 814 and CW 82 forms to Priority 1. As these are print local only forms, a BRM envelope will not be added to these forms.

2.4 Add Imaging Barcode for forms

2.4.1 Overview

For the new CalSAWS Imaging Solution, all applicable Forms will need to have the standardized 2D imaging barcode for documents to be properly imaged and tracked for a customer.

2.4.2 Description of Change

1. Apply a DCR to the forms mentioned in Supporting Document 10 to enable Imaging Barcode and to add the Imaging Document Type, Imaging Form Name.
2. Display the standardized 2D imaging barcode on the forms mentioned in Supporting Document 10.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	CAL 11	CAL11.PDF
2.	Correspondence	CF 303	CF303.PDF
3.	Correspondence	PA 528	PA528.PDF
4.	Correspondence	ABPSSI-1	ABPSSI-1.PDF
5.	Correspondence	SOC 807	SOC807.PDF
6.	Correspondence	WTW EOA1	WTWEOA1.PDF
7.	Correspondence	CW 25	CW25.PDF
8.	Correspondence	CW 1725	CW1725.PDF
9.	Correspondence	Coversheet Sentences Translation	Translations.PDF

10.	Correspondence	List of forms to include Imaging Barcode	List of forms to include Imaging Barcode.xlsx
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4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.3.2.8	The LRS shall accommodate various envelope sizes for mailing while conforming to USPS standards for mail piece size.	<p>A BRM envelope has been added for the below mentioned forms.</p> <ul style="list-style-type: none"> • CAL 11 • CF 303 • PA 528 • ABPSSI-1 • SOC 807 • WTW EOA1 • CW 25 • CW 1725

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-224193 | DDID 1787 and 1789

Migrate C-IV County Specific Batch Jobs

(Phase 6)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ishrath Khan
	Reviewed By	Duke Vang, Sidhant Garg, Kapil Santosh, Romel Acosta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/16/2021	1.0	Initial Revision	Ishrath Khan

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1 OVERVIEW

1.1 Current Design

There are approximately 21 different Issuance Batch Sweeps in LRS/CalSAWS. Some of these batch sweeps run daily whereas some run monthly. These batch sweeps target authorization records (EDBC, Payment Request, and Recovery Account Refund) for all programs where Customers are eligible to benefits or Supportive Service Payments.

There are a set of core Issuance Creation Batch jobs that create issuance records based on the authorization records identified by the Issuance Batch Sweeps. The Daily (PBXXF101) and Monthly (PBXXF100) Issuance County Batch job are the preamble to all the Issuance Batch Sweep jobs and tells the core Issuance Creation Batch jobs if the issuances will be created as supplemental benefits or main payroll benefits.

The following migration SCRs have migrated/merged C-IV County specific batch jobs from the C-IV code base into LRS/CalSAWS in previous releases:

- CA-210771
- CA-207250
- CA-210772
- CA-213659
- CA-216568

1.2 Requests

Per Design Differences ID 1787 and 1789, C-IV County specific batch jobs are to be migrated or merged into CalSAWS. As a guiding principle, the C-IV Counties will adopt any existing CalSAWS batch jobs whenever possible. This design will be phase 6 of that effort.

1.3 Overview of Recommendations

1. Migrate the C-IV county specific fiscal jobs into the CalSAWS system.
2. The CalSAWS Batch Scheduler will be updated to account for these CalSAWS Batch Jobs .

1.4 Assumptions

1. All migration county batch scheduling changes will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.

2 RECOMMENDATIONS

2.1 C-IV County -Fiscal Jobs

2.1.1 Overview

Migrate the list of C-IV county specific fiscal jobs on the spreadsheet named "FiscalJobs_Phase6Migration" attached to JIRA

2.1.2 Description of Change

1. Migrate the latest versions of the all the batch modules and batch properties from the C-IV code base into CalSAWS for the jobs listed on the spreadsheet named "Phase6FiscalJobs" attached to JIRA.
2. Submit a Batch Scheduling Chang Request (BSCR) to update the batch scheduler for the batch jobs referenced in the attached spreadsheet.
3. Update the existing Foster Care sweep logic (PB00F304) to include authorization records for retro months in addition to current month for 57 Migration counties.

Note: This job runs daily except the first business day of the month

Note: LA county is not impacted by this update.

4. Update the Merced Direct Deposit Reader and Reader FTP job names from PI24F201/PI24F241 to PI24F200/PI24F240.
Note: This update is only a name change for the batch jobs and does not impact any underlying logic.

5. Update Scheduler for C-IV counties to have the following jobs ran from Monday through Saturday instead of Monday through Friday.

- Nightly EDBC Sweep: PB00F302
- Nightly EDBC Non-FC Sweep: PB00F303
- Nightly EDBC FC Sweep: PB00F304
- Nightly Payment Request Sweep: PB00F305
- Nightly Recovery Account Sweep: PB00F306
- Nightly Expungement Sweep: PB00F307
- Nightly Issuance Clean-up: PB00F309
- Nightly WINS Sweep: PB00F311
- Nightly SUAS Sweep: PB00F312
- Nightly Nutrition Benefit EDBC Sweep: PB00F324
- Future Month Nutrition Benefit EDBC Sweep: PB00F325
- Future Month Supplemental Sweep: PB00F326

2.1.3 Execution Frequency

2.1.4 Key Scheduling Dependencies

2.1.5 Counties Impacted

C-IV counties

2.1.6 Data Volume/Performance

2.1.7 Failure Procedure/Operational Instructions

For all issuance sweep batch jobs, the jobs can be resubmitted after deleting the batch restart data. This may produce duplicate entries into the ISSUANCE_TRANSMACT table, however there is a cleanup job that will delete duplicate entries before the actual issuance batch create job runs.

2.2 Automated Regression Test

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1787	The CONTRACTOR shall migrate the C-IV County Specific Batch Jobs across the impacted Batch modules into the CalSAWS Software as determined during the migration design phase.	<ul style="list-style-type: none">- All 58 counties will be incorporated into the same batch schedule.- The jobs that are new since side by side will be migrated into the CalSAWS System.- C-IV County interfaces that were included in LRS baseline will not require functional updates.- The Batch properties and scheduling will have to be updated for each wave separately.	<ol style="list-style-type: none">1. The Fiscal batch jobs and batch properties for 57 counties will be migrated to CalSAWS as part of Phase 6.

1789	<p>The CONTRACTOR shall update the CalSAWS Batch Scheduler to account for all the new CalSAWS Batch Jobs that are applicable to all 58 Counties.</p>	<ul style="list-style-type: none"> - There will be one combined Batch Scheduler for all 58 Counties. - All non-County-specific Batch jobs that exist in LRS will run for all 58 Counties, unless otherwise specified in other DDIDs to be County configurable. - The CalSAWS batch schedule will be run nightly, excluding holiday and system down days, unless otherwise agreed to by the Consortia. - The Batch properties and scheduling will have to be updated for each wave separately 	<ol style="list-style-type: none"> 1. The CalSAWS Batch Scheduler will be updated to account for the above CalSAWS Batch Jobs.
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-224702

Remove the hard validation on EDBC when
authorized amount is greater than zero and Aid
Code is 4P or 4R

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/18/2021	1.0	Initial Draft	T. Lazio

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1 OVERVIEW

A hard validation prevents users from issuing benefits for the CalWORKs (CW) program when the EDBC Authorized Amount is greater than zero and the aid code is 4P (CW Family Reunification- All Families) or 4R (CW Family Reunification-Two Parent). This SCR will remove the hard validation to allow users to issue CW benefits for Aid Codes 4P and 4R when overriding an EDBC or processing a manual EDBC.

1.1 Current Design

CalSAWS displays the following validation messages to prevent users from issuing benefits when attempting to override a CW EDBC or process a manual CW EDBC using aid codes 4P or 4R with an Authorization Amount greater than zero:

- **Override Program Configuration** - Authorized amount for a CalWORKs Family Reunification aid code 4P or 4R cannot be greater than zero. (Override EDBC)

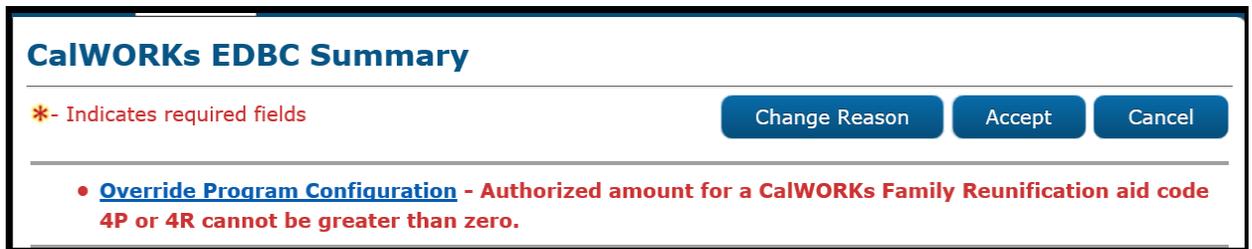


Figure 1.1.1 – 4P/4R Validation Message- Override EDBC

- **Set Program Configuration** - Authorized amount for a CalWORKs Family Reunification aid code 4P or 4R cannot be greater than zero. (Manual EDBC)

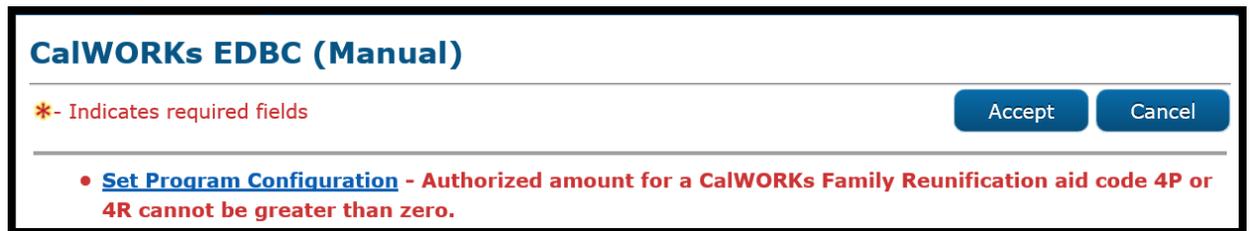


Figure 1.1.2 – 4P/4R Validation Message- Manual EDBC

1.2 Requests

Remove the hard validations from CalWORKs EDBC Summary and CalWORKs EDBC (Manual) pages to allow users to issue benefits under Aid Codes 4P and 4R where the EDBC Authorized Amount is greater than zero.

1.3 Overview of Recommendations

1. Update the CW EDBC Summary page to not display validation message when the user overrides the EDBC using aid codes 4P or 4R and the Authorized Amount is greater than zero.
2. Update the Manual CW EDBC Summary page to not display validation message when the user selects aid codes 4P or 4R and the Authorized Amount is greater than zero.

1.4 Assumptions

1. There is no Fiscal logic to prevent issuances with aid codes 4P or 4R from going out.

2 RECOMMENDATIONS

2.1 CalWORKs EDBC Summary Page Validation Message

2.1.1 Overview

CW EDBC Summary page will be updated to not display the validation message that prevents users from accepting overwritten EDBC results using aid codes 4P or 4R with an Authorized Amount greater than zero.

2.1.2 Description of Changes

Update CW EDBC Summary page to not display 'Override Program Configuration' message when the user selects the "Accept" button on the EDBC Summary page and the following conditions are met:

- a. User selects aid code 4P (CW Family Reunification- All Families) or 4R (CW Family Reunification-Two Parent) on the Program Configuration Override List page.
- b. EDBC Authorized Amount is greater than zero.

2.1.3 Page Location

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

2.1.4 Programs Impacted

CalWORKs

2.2 CalWORKs Manual EDBC Page Validation Message

2.2.1 Overview

CW EDBC Manual Summary page will be updated to not display the validation message that prevents users from accepting manual EDBC results using aid codes 4P or 4R with an Authorized Amount greater than zero.

2.2.2 Description of Changes

Update CW EDBC Manual page to not display 'Set Program Configuration' message when the user selects the "Accept" button on the CW EDBC Manual page and the following conditions are met:

- a. User selects aid code 4P (CW Family Reunification- All Families) or 4R (CW Family Reunification-Two Parent) on the Program Configuration List page.
- b. EDBC Authorized Amount is greater than zero.

2.2.3 Page Location

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

2.2.4 Programs Impacted

CalWORKs

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.6.8	The LRS shall display both ED/BC results and ED/BC manual override eligibility and benefit information for ED/BC manual override situations. Only COUNTY-specified Users may change ED/BC override eligibility and benefit information.	Remove hard stop validation messages to allow users to override or manually process CW EDBC's using Aid Codes 4P and 4R where Authorized Amount is greater than zero.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-225100

DDID 1631: Update with CalHEERS Horizontal
Integration Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Remi Lassiter
	Reviewed By	Ravneet Bhatia

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/1/2021	1.0	Initial document	Remi Lassiter

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1 OVERVIEW

The CalHEERS Horizontal Integration reports which were introduced to the system by SCR 48383 capture the applications submitted through the self-service portal for which a CalHEERS Case Number was entered. The following reports will be updated with this design update:

- CalHEERS Horizontal Integration Report which provides a summary of all CalWORKS and CalFresh applications submitted through the self-service portal for which a CalHEERS Case Number was entered.
- CalHEERS Horizontal Integration Detail Report which tracks the CalFresh and CalWORKs program applications submitted through SSP with a CalHEERS case number.
- CalHEERS Horizontal Integration Detail Report with MC which tracks the CalFresh, CalWORKs, and Medi-Cal program applications submitted through SSP with a CalHEERS case number.

This SCR will make the necessary updates to the logic of these reports in the CalSAWS system so that C-IV data will be properly reported following migration.

1.1 Current Design

The C-IV and CalSAWS systems each have different self-service portals and different versions of the CalHEERS Horizontal Integration reports. Going forward the CalSAWS tables will be utilized for report logic for all counties.

In CalSAWS, these reports leverage data from reports staging tables which are populated by DBAs each month. These tables have the prefix RPT_YBN_* in their title. Going forward these tables will no longer be populated, and their source tables will be used directly in the report logic instead. The source tables have the prefix C4Y_*.

The CalSAWS reports currently do not contain logic to extract county-specific data from the self-service portal applications since they were originally reporting on only one county.

1.2 Requests

There is one self-service portal for CalSAWS and the report logic needs to be updated to accurately capture information from the tables holding self-service portal data for all 40 counties.

1.3 Overview of Recommendations

1. Make the following updates to the CalHEERS Horizontal Integration Report:
 - a. Update the report logic to pull self-service portal data from the C4Y_* tables instead of the RPT_YBN_* tables.
 - b. Add logic to extract county-specific self-service portal applications.
2. Make the following updates to the CalHEERS Horizontal Integration Detail Report:

- a. Update the report logic to pull self-service portal data from the C4Y_* tables instead of the RPT_YBN_* tables.
 - b. Add logic to extract county-specific self-service portal applications
3. Make the following updates to the CalHEERS Horizontal Integration Detail Report with MC:
 - a. Update the report logic to pull self-service portal data from the C4Y_* tables instead of the RPT_YBN_* tables.
 - b. Add logic to extract county-specific self-service portal applications

1.4 Assumptions

1. All changes described in this SCR will be made in the CalSAWS system.
2. All self-service portal data relevant to these reports will be stored in the C4Y_* tables.
3. No additional SCRs are required to support the remaining 18 counties migration.
4. By the time this SCR is implemented, the location of the CalHEERS Horizontal Integration Detail Report will have been updated to Reports > Scheduled > State by SCR CA-215941 in Release 21.03.
5. SCR CA-215939 which is scheduled for Release 21.11 will update the location of the CalHEERS Horizontal Integration Detail Report with MC to Reports > Scheduled > State.
6. Any "YBN" or "C4Y" text in the reports will be updated to the new self-service portal system, BenefitsCal, in a future SCR.
7. Previous report months will not be re-runnable. Any historically generated report will be migrated with document migration SCR by Conversion team.

2 RECOMMENDATIONS

2.1 CalHEERS Horizontal Integration Report

2.1.1 Overview

The CalHEERS Horizontal Integration Report is a monthly scheduled state report which provides a summary of all CalWORKS and CalFresh applications submitted through the self-service portal for which a CalHEERS Case Number was entered. This section will update the logic of this report to use the appropriate C4Y_* source tables and extract county-specific self-service portal applications.

2.1.2 CalHEERS Horizontal Integration Report Screenshot

1. Applications initiated/started using a CalHEERS #				2. Applications completed/submitted using a CalHEERS #			3. Applications approved using a CalHEERS #		
County	CalFresh	CalWORKS	Total	CalFresh	CalWORKS	Total	CalFresh	CalWORKS	Total
Los Angeles									

Figure 2.1.1 – CalHEERS Horizontal Integration Report Screenshot

Note: No changes are being made to the report template.

2.1.3 Description of Change

1. Update the report logic to pull self-service portal data from the C4Y_* source tables instead of the RPT_YBN_* staging tables. See the table below for the mapping to the source tables.

Report Staging Table	Source Table
RPT_YBN_APP.APP_DATE	C4Y_APP.APP_DATE
RPT_YBN_APP.APP_NUM_IDENTIF	C4Y_APP.APP_NUM
RPT_YBN_APP.COVERED_CA_CASE_NUMBER	C4Y_APP.CH_CASE_NUM
RPT_YBN_APP.CREATED_ON	C4Y_APP.CREATED_ON

RPT_YBN_APP.ID	C4Y_APP.ID
RPT_YBN_APP.WRKR_NUM_IDENTIF	C4Y_APP.WRKR_NUM_IDENTIF
RPT_YBN_PERS.FIRST_NAME	C4Y_PERS.FIRST_NAME
RPT_YBN_PERS.LAST_NAME	C4Y_PERS.LAST_NAME
RPT_YBN_PERS.MID_NAME	C4Y_PERS.MID_NAME
RPT_YBN_APP_PERS.PERS_ID	C4Y_APP_PERS.PERS_ID
RPT_YBN_APP_PERS.PRIM_APP_IND	C4Y_APP_PERS.PRIM_APP_IND
RPT_YBN_PGM.PGM_CODE	C4Y_PGM.PGM_CODE

2. Add logic to extract county-specific self-service portal applications.

Technical Note: Currently county code is hardcoded to LA County in the report logic. Update the logic to extract county from C4Y_ADDR.COUNTY_CODE for the primary applicant by joining C4Y_APP to C4Y_APP_PERS to C4Y_PERS_ADDR to C4Y_ADDR where C4Y_APP_PERS.PRIM_APP_IND = Y.

2.1.4 Report Location

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

2.1.5 Counties Impacted

The 40 CalSAWS counties that were formerly in C-IV and LRS will be impacted by the changes described in this section.

2.1.6 Security Updates

No updates will be made to the security of this report.

2.1.7 Report Usage/Performance

Report usage/performance will not be affected by the changes described in this section.

2.2 CalHEERS Horizontal Integration Detail Report

2.2.1 Overview

The CalHEERS Horizontal Integration Detail Report is a monthly scheduled report which provides a detailed information on all CalWORKS and CalFresh applications submitted through the self-service portal for which a CalHEERS Case Number was entered. This section will update the logic of this report to use the appropriate C4Y_* source tables and extract county-specific self-service portal applications.

2.2.2 CalHEERS Horizontal Integration Detail Report Screenshot

C4Y/YBN Applications With a Covered CA Case Number Entered			
	CalFresh	CalWORKS	Total
Line 1 Initiated	0	0	0
Line 2 Submitted	0	0	0
Line 3 Granted Benefits	0	0	0
			Total: 0

Figure 2.2.1 – CalHEERS Horizontal Integration Detail Report Screenshot

Note: No changes are being made to the report template.

2.2.3 Description of Change

1. Update the report logic to pull self-service portal data from the C4Y_* source tables instead of the RPT_YBN_* staging tables. See the table below for the mapping to the source tables.

Report Staging Table	Source Table
RPT_YBN_APP.APP_DATE	C4Y_APP.APP_DATE
RPT_YBN_APP.APP_NUM_IDENTIF	C4Y_APP.APP_NUM
RPT_YBN_APP.COVERED_CA_CASE_NUMBER	C4Y_APP.CH_CASE_NUM
RPT_YBN_APP.CREATED_ON	C4Y_APP.CREATED_ON
RPT_YBN_APP.ID	C4Y_APP.ID
RPT_YBN_APP.WRKR_NUM_IDENTIF	C4Y_APP.WRKR_NUM_IDENTIF

RPT_YBN_PERS.FIRST_NAME	C4Y_PERS.FIRST_NAME
RPT_YBN_PERS.LAST_NAME	C4Y_PERS.LAST_NAME
RPT_YBN_PERS.MID_NAME	C4Y_PERS.MID_NAME
RPT_YBN_APP_PERS.PERS_ID	C4Y_APP_PERS.PERS_ID
RPT_YBN_APP_PERS.PRIM_APP_IND	C4Y_APP_PERS.PRIM_APP_IND
RPT_YBN_PGM.PGM_CODE	C4Y_PGM.PGM_CODE

2. Add logic to extract county-specific self-service portal applications.

Technical Note: Currently county code is hardcoded to LA County in the report logic. Update the logic to extract county from C4Y_ADDR.COUNTY_CODE for the primary applicant by joining C4Y_APP to C4Y_APP_PERS to C4Y_PERS_ADDR to C4Y_ADDR where C4Y_APP_PERS.PRIM_APP_IND = Y.

2.2.4 Report Location

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

Note: this is the updated location per the changes made in SCR CA-215941 in Release 21.03.

2.2.5 Counties Impacted

The 40 CalSAWS counties that were formerly in C-IV and LRS will be impacted by the changes described in this section.

2.2.6 Security Updates

No updates will be made to the security of this report.

2.2.7 Report Usage/Performance

Report usage/performance will not be affected by the changes described in this section.

2.3 CalHEERS Horizontal Integration Detail Report with MC

2.3.1 Overview

The CalHEERS Horizontal Integration Detail Report with MC is a monthly scheduled report which provides a detailed information on all CalWORKS, CalFresh and Medi-Cal applications submitted through the self-service portal for which a CalHEERS Case Number was entered. This section will update the logic of this report to use the appropriate C4Y_* source tables and extract county-specific self-service portal applications.

2.3.2 CalHEERS Horizontal Integration Detail Report with MC Screenshot

Figure 2.3.1 – CalHEERS Horizontal Integration Detail Report with MC Screenshot

Note: No changes are being made to the report template.

2.3.3 Description of Change

1. Update the report logic to pull self-service portal data from the C4Y_* source tables instead of the RPT_YBN_* staging tables. See the table below for the mapping to the source tables.

Report Staging Table	Source Table
RPT_YBN_APP.APP_DATE	C4Y_APP.APP_DATE
RPT_YBN_APP.APP_NUM_IDENTIF	C4Y_APP.APP_NUM
RPT_YBN_APP.COVERED_CA_CASE_NUMBER	C4Y_APP.CH_CASE_NUM
RPT_YBN_APP.CREATED_ON	C4Y_APP.CREATED_ON
RPT_YBN_APP.ID	C4Y_APP.ID
RPT_YBN_APP.WRKR_NUM_IDENTIF	C4Y_APP.WRKR_NUM_IDENTIF

RPT_YBN_PERS.FIRST_NAME	C4Y_PERS.FIRST_NAME
RPT_YBN_PERS.LAST_NAME	C4Y_PERS.LAST_NAME
RPT_YBN_PERS.MID_NAME	C4Y_PERS.MID_NAME
RPT_YBN_APP_PERS.PERS_ID	C4Y_APP_PERS.PERS_ID
RPT_YBN_APP_PERS.PRIM_APP_IND	C4Y_APP_PERS.PRIM_APP_IND

2. Add logic to extract county-specific self-service portal applications.

Technical Note: Currently county code is hardcoded to LA County in the report logic. Update the logic to extract county from C4Y_ADDR.COUNTY_CODE for the primary applicant by joining C4Y_APP to C4Y_APP_PERS to C4Y_PERS_ADDR to C4Y_ADDR where C4Y_APP_PERS.PRIM_APP_IND = Y.

2.3.4 Report Location

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

Note: SCR CA-215939 which is scheduled for Release 21.11 will update this report's location to Reports > Scheduled > State.

2.3.5 Counties Impacted

The 40 CalSAWS counties that were formerly in C-IV and LRS will be impacted by the changes described in this section.

2.3.6 Security Updates

No updates will be made to the security of this report.

2.3.7 Report Usage/Performance

Report usage/performance will not be affected by the changes described 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
n/a		

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1631	<p>The CONTRACTOR shall set aside an allowance of nine thousand hours (9,000) to create new reports or update existing reports as part of Migration for the 58 Counties. These reports will be defined during the migration design effort.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As requirements for the new reports are identified, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the 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.</p>	<p>Update the logic of the CalHEERS Horizontal Integration reports logic to pull self-service portal data from the C4Y_* tables instead of the RPT_YBN_* tables and add logic to extract county-specific self-service portal applications.</p>

5 MIGRATION IMPACTS

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

6 APPENDIX

n/a

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR #225842 – Update CalSAWS Forms architecture to render editable Form templates in HTML5 format

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sumeet Patil
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/24/2021	1.0	Initial version	Sumeet P.

DRAFT

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5	Migration Impacts.....	Error! Bookmark not defined.
6	Outreach.....	Error! Bookmark not defined.
7	Appendix.....	Error! Bookmark not defined.

1 OVERVIEW

This document summarizes the changes required to CalSAWS Forms architecture to support rendering of Forms in HTML5.

1.1 Current Design

The CalSAWS system currently uses Adobe Experience Manager (AEM) Software as a Service (SAAS) in the cloud to generate Correspondence Forms/NOAs. This service renders the Forms as editable PDFs in CalSAWS application.

1.2 Requests

The editable Forms should render correctly with Google Chrome and other modern browsers.

1.3 Overview of Recommendations

The recommendations for supporting editable forms in HTML5 are as follows –

1. Update CalSAWS Forms architecture to support rendering editable Form templates in HTML5 format.
2. The Forms architecture should support rendering of Forms in HTML5 format as well as editable PDF.
3. The Forms template management solution should support templates for HTML5 as well as editable PDFs.
4. Adobe vendor will upgrade the AEM SAAS version to v6.5.

1.4 Assumptions

- Required changes will be made to the Form templates to support HTML5 rendering.
- CalSAWS Batch jobs does not generate editable Forms.
- Adobe Vendor will fix any HTML5 rendering issues tied to editable forms.
- The HTML5 version of Form will be close to the original editable PDF version, but may not be identical.
- The HTML5 Forms should be legible and contextually correct. But may have minor cosmetic issues.

2 RECOMMENDATIONS

2.1 Updates to CalsAWS Forms architecture

- The CalSAWS Forms architecture interface will be updated to support rendering of Forms in editable HTML5 or editable PDFs.

- Reverse proxy will be configured to serve the editable HTML5 forms from Adobe SAAS.
- The AEM OSGI component deployed in Adobe SAAS will be integrated with ForgeRock IAM to authorize valid CalSAWS session.

2.2 Forms Template Management

- The build and deployment strategy of Form templates will be updated to support rendering of Forms in editable HTML5 or editable PDFs.
- Adobe SAAS will be configured to read Form templates from different paths depending on the rendering format (HTML5 vs PDF)

2.3 AEM Upgrade

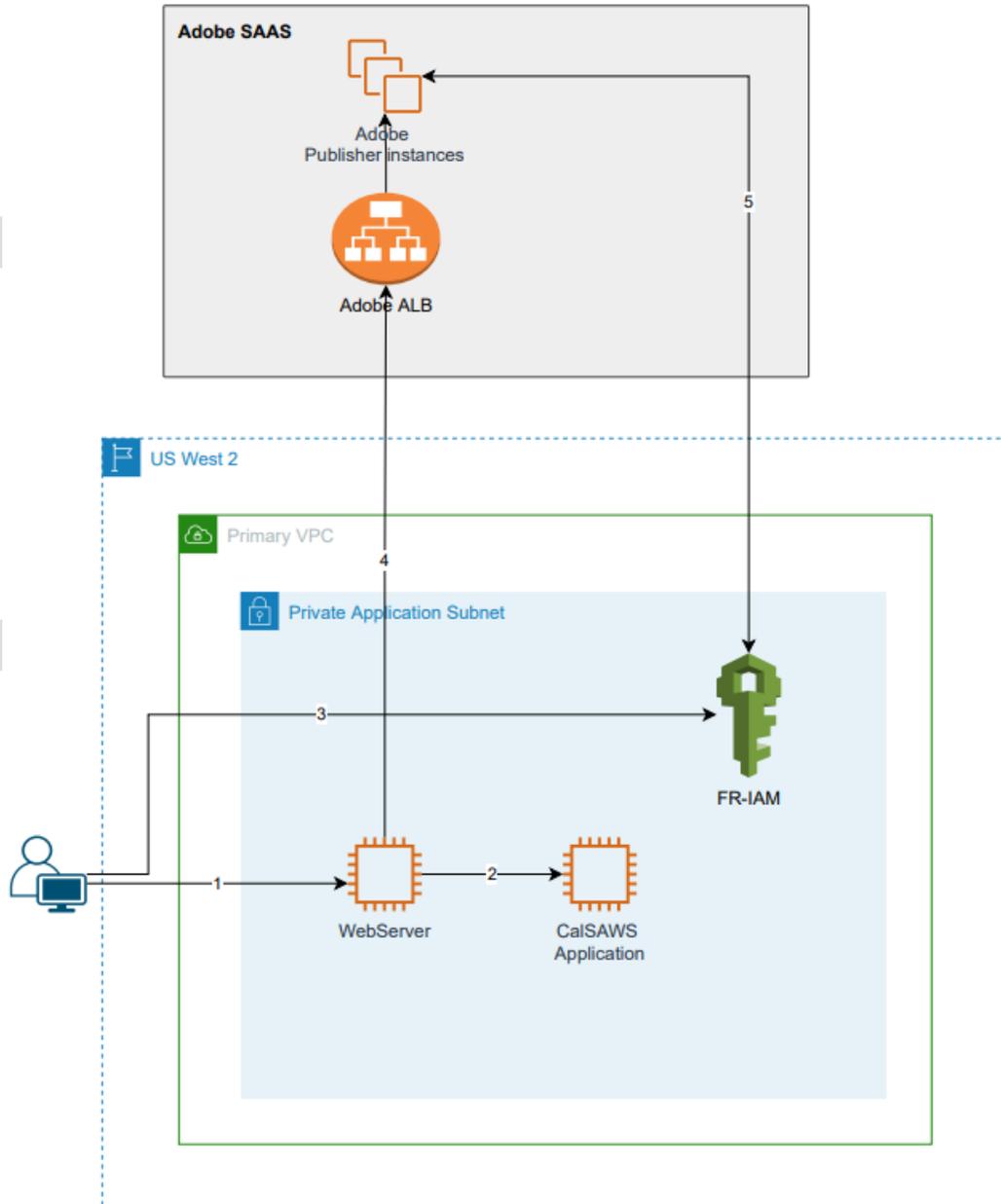
- The Adobe vendor will upgrade the AEM version in SAAS to v6.5.

DRAFT

3 APPENDIX

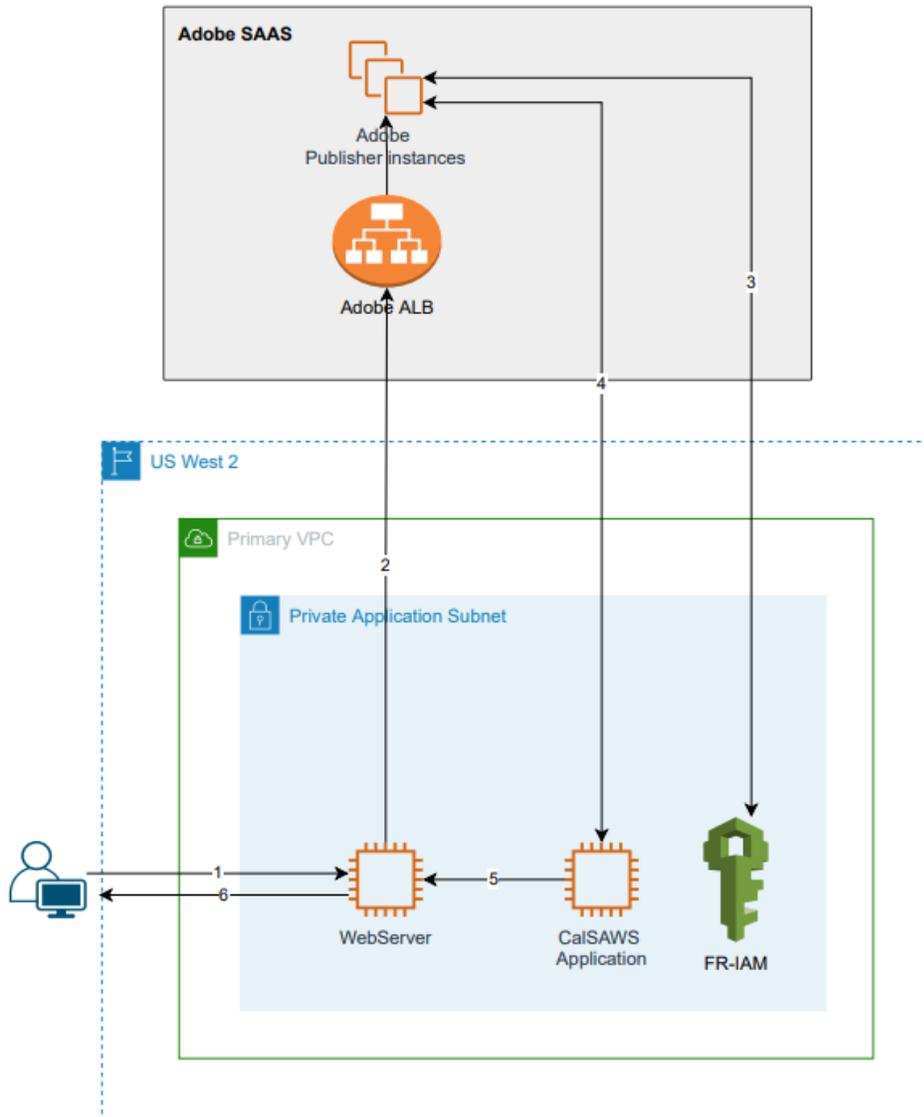
3.1 Generate Editable Form Form Flow

- a. This flow is triggered by clicking 'Generate Form' or 'Generate Blank Template' on Document parameters page.
- b. It will render an editable HTML5 form in user's browser for the selected template.



3.2 Submit Form Flow

- a. This flow is triggered by clicking Print Locally or Print Centrally button on the editable HTML5 form
- b. It will render a flattened PDF in user's browser.



CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226000

DDID 34 – Task Management

Legacy Task Category

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/10/2021	1.0	Initial Revision	Mayuri Srinivas

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1 OVERVIEW

This design describes modifications to the CalSAWS System to introduce a new Task Category to support Legacy Task Types.

1.1 Current Design

The C-IV and CalSAWS Systems both support customizable Task Types via the Task Type Detail page. SCR CA-214928 introduced customizable Task Types to the CalSAWS System per DDID 34 in November of 2020.

Task Types within the CalSAWS System are required to be associated to a Task Category. The Task Type Detail page in the C-IV System does not include a Task Category attribute.

1.2 Requests

Introduce a new Task Category that will be associated to converted Task Types. This attribute is necessary to support Task assignment and distribution functionality in the CalSAWS System.

1.3 Overview of Recommendations

1. Add a Legacy Task Category to the CalSAWS System to support converted Task Types.

1.4 Assumptions

1. C-IV System converted Task Types will all be associated to the "Legacy" Task Category.
2. C-IV System converted Positions will by default have the "Legacy" Task Category selected in the Tasks panel of the Position Detail page.
3. Task functionalities that are reliant on evaluations of the Task Category attribute do not require logic modifications to function appropriately with the addition of a new Legacy Task Category.

2 RECOMMENDATIONS

2.1 Legacy Task Category

2.1.1 Overview

Each Task Type within the CalSAWS System is required to be associated to a Task Category. There is no such attribute in the C-IV System. A new Task Category is required to support converted Task Types. This section outlines the recommendations to introduce a new Task Category to support converted Task Types and Positions.

2.1.2 Description of Changes

1. Add a "Legacy" Task Category to the CalSAWS System. This Task Category will be available for use for all CalSAWS Counties.

Technical: The code value for this Task Category must be "LC".

- a. The "Legacy" Task Category will appear in Task Category dropdown menus on the following online pages per current requirements and ordering of each field:
 - i. Pop Up - Task Search
 - ii. Pop Up – Task Detail
 - iii. Task Type List
 - iv. Task Type Detail
 - v. Task Reassignment Detail
 - vi. Worklist
 - vii. Worklist – Task Detail
 - viii. Worklist PR RE

For additional details of the above pages, reference design documentation in the following enhancements:

- CA-214928: DDID 34
- CA-221629: DDID 34 Continued
- CA-214929: DDID 655

- b. The "Legacy" Task Type Category value will function as follows on the Task Type Detail page:

Page Mode	"Legacy" Task Category Behavior
View	The Category attribute of the Task Type will display; "Legacy" if the Category of the Task Type is "Legacy".

Page Mode	"Legacy" Task Category Behavior
Edit	<p>If the Task Type Category value is not "Legacy" when Edit mode is initiated, "Legacy" will not be a selectable option in the Category dropdown menu.</p> <p>If the Task Type Category value is "Legacy" when Edit mode is initiated, "Legacy" will remain a selectable option in the Category dropdown menu until the "Save and Return" button is clicked. If the Category value is changed to a value other than "Legacy" and the page is saved, via the Save and Return button, subsequent edits to the Task Type will not include "Legacy" in the Category dropdown menu.</p>
Create	<p>The Category drop down menu will not include the "Legacy" value. Newly created Task Types cannot be associated to a "Legacy" Task Category.</p>

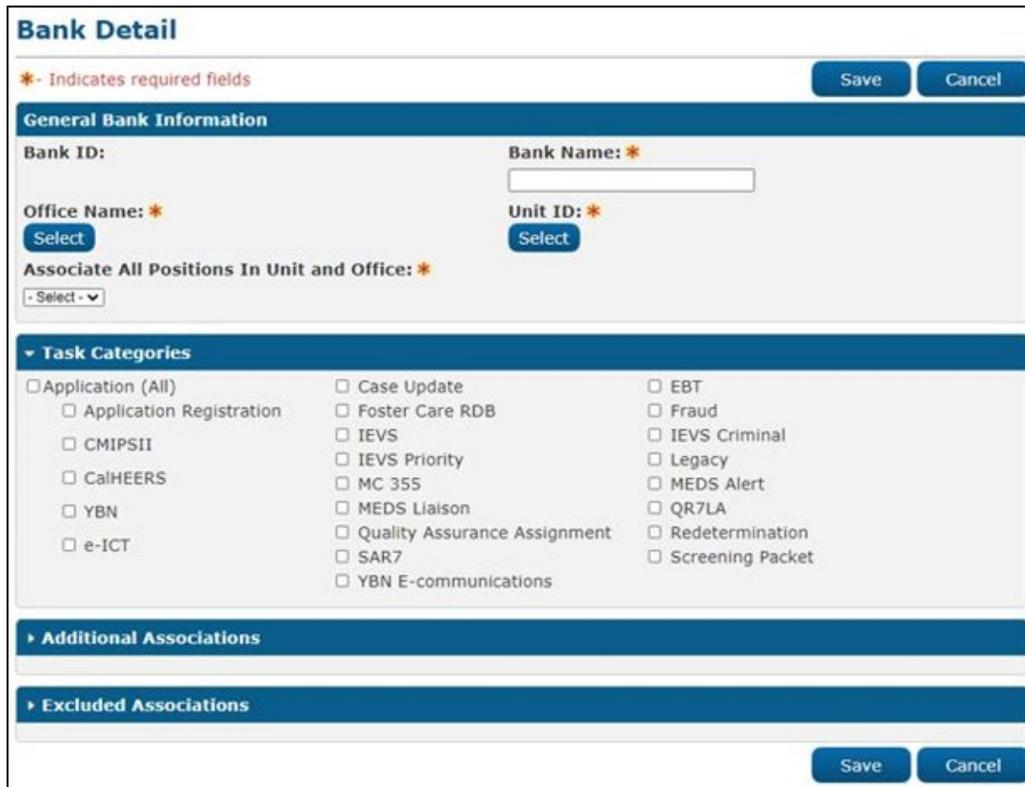
Note: Additional online pages other than the Task Type Detail page that display the Task Category attribute do NOT require logic modifications to display the new "Legacy" Task Category value.

2.2 Bank Detail Page

2.2.1 Overview

The Bank Detail page allows users to view, create and manage Banks within the CalSAWS System. The Bank Detail page contains a "Task Categories" section allowing a Bank to be configured to receive one or more Task Categories via the Office Distribution processing.

2.2.2 Bank Detail Page Mockup



The mockup shows a 'Bank Detail' form with a title bar and 'Save' and 'Cancel' buttons. A legend indicates that an asterisk (*) denotes required fields. The form is divided into several sections: 'General Bank Information' containing 'Bank ID', 'Bank Name', 'Office Name', 'Unit ID', and an 'Associate All Positions In Unit and Office' dropdown; 'Task Categories' with a grid of checkboxes for various categories like Application, Case Update, EBT, etc.; 'Additional Associations'; and 'Excluded Associations'. A second set of 'Save' and 'Cancel' buttons is located at the bottom right.

Figure 2.2.2.1 – Bank Detail Page Mockup

2.2.3 Description of Changes

1. Add the “Legacy” Task Category as a selectable option in the Task Categories Panel of the Bank Detail page. Underlying logic of the page will not be modified.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Position Detail Page

2.3.1 Overview

The Position Detail page allows configuration of various attributes related to a Position. The Tasks panel allows a Position to be configured for receipt of one or more Categories of Tasks.

2.3.2 Position Detail – Tasks Panel Mockup

Tasks		
<input type="checkbox"/> Application (All)	<input type="checkbox"/> Case Update	<input type="checkbox"/> EBT
<input type="checkbox"/> Application Registration	<input type="checkbox"/> Foster Care RDB	<input type="checkbox"/> Fraud
<input type="checkbox"/> CMIPSI	<input type="checkbox"/> IEVS	<input type="checkbox"/> IEVS Criminal
<input type="checkbox"/> CalHEERS	<input type="checkbox"/> IEVS Priority	<input type="checkbox"/> Legacy
<input type="checkbox"/> YBN	<input type="checkbox"/> MC 355	<input type="checkbox"/> MEDS Alert
<input type="checkbox"/> e-ICT	<input type="checkbox"/> MEDS Liaison	<input type="checkbox"/> QR7LA
	<input type="checkbox"/> Quality Assurance Assignment	<input type="checkbox"/> Redetermination
	<input type="checkbox"/> SAR7	<input type="checkbox"/> Screening Packet
	<input type="checkbox"/> YBN E-communications	

Figure 2.3.2.1 – Position Detail – Tasks Panel Mockup

2.3.3 Description of Changes

1. Add the "Legacy" Task Category as a selectable option in the Task Categories Panel of the Position Detail page. Underlying logic of the page will not be modified.

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	<p>The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows:</p> <ol style="list-style-type: none"> 1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base 2) Create a common task management data model 3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution) 4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County 5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies 6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker 7) Update the LRS Task 	<ul style="list-style-type: none"> - CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV. - CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks. - OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation. 	<p>This design introduces a recommendation that will support converted Task Types so as to not impact task functionality currently available to C-IV System users.</p>

	Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		
--	--	--	--

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A