

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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		<p>to match the change being done on the Position Detail page (Section 2.7) for the Current Case Load field.</p> <p>4. Updated all appropriate numberings to match each sections accordingly due to the addition of a new section.</p> <ul style="list-style-type: none"> i. Figure 2.6.1 to Figure 2.7.1 on Section 2.7.2 ii. The reference made on Section 2.9.1 was updated from 'Section 2.7.3 to 2.8.3. iii. Updated Table 2.9.1 to 2.10.1 on Section 2.10.1 iv. The reference made on 2.10.2 was updated from 2.9.22 to 2.10.22 and Table 2.9.2.1 to 2.10.2.1 v. Update Figure 2.2.1 to 2.11.1 on Section 2.11.2. vi. Updated the reference from Section 2.11.3 from 2.5.3 to 2.4.3. 	
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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 mockup shows a web form titled "Staff Assignment Detail". At the top right, there are two buttons: "Save and Return" and "Cancel". Below the title bar, a red error message is displayed: "• **End Date** - The End Date cannot be set due to current program assignments for this worker." Below the error message is a grey-bordered 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 <input type="button" value="Select"/>	Assignment Type: <input type="text" value="Primary"/>	Display Workload: * <input type="text" value="11/04/2020"/>
Status Effective Date: * <input type="text" value="11/04/2020"/>	Status: <input type="text" value="All"/>	

Results per Page:

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
<input type="button" value="⌵"/> <input type="button" value="⌵"/> L567128	JANE, EDDA 40F	CW	Active	01/06/2020	09/05/2020	12/2020	<input type="button" value="⌵"/> <input type="button" value="⌵"/>
<input type="button" value="⌵"/> <input type="button" value="⌵"/> 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.
 - i. 'Status:' dropdown field will be located underneath the 'Assignment Type:' field as shown on Figure 2.3.1.
 - 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
 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. Update the placement of the 'Status Effective Date:' field to be located underneath the 'Worker ID:' ID field as shown on Figure 2.3.1.

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

Child Care Workload Inventory

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

Total Assignments

Cases	0
Programs	0

Case Number	Primary	Sub-Program	Status	Application Date	Re-Evaluation Date
No Data Found					

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 Search

2.6.1 Overview

The Position Search page allows users to perform a search of office position profiles within the system. This SCR will update the logic used on Caseload Count that is being displayed to disregard programs that are in denied, discontinued or deregistered status.

2.6.2 Position Search Screenshot

Position Search

► Refine Your Search

Search Results Summary							Results 1 - 1 of 1
Worker ID	Worker Level	Office Name	Section ID	Unit ID	Status	Caseload Count	
19DP344W16	Eligibility Worker	034 Lancaster	5Q	4W00	Active	495	

This [Type 1](#) page took 0.38 seconds to load.

Figure 2.6.1 – Position Search Screenshot – Reference only.

2.6.3 Description of Changes

1. Update the logic used on the 'Caseload count' field 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 Caseload Count field

2.6.7 Page Usage/Data Volume Impacts

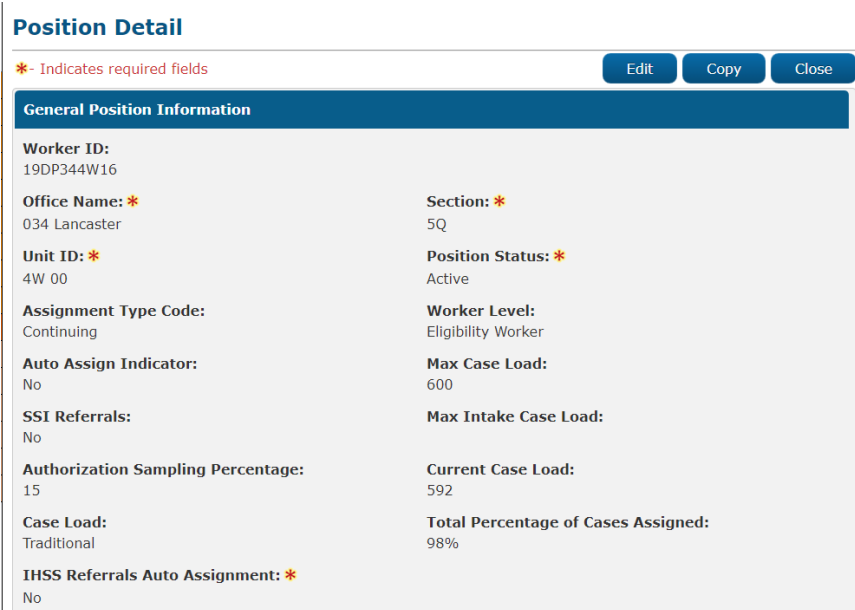
N/A

2.7 Position Detail

2.7.1 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.

2.7.2 Position Detail Screenshot



The screenshot displays the 'Position Detail' page. At the top, there is a title 'Position Detail' and three buttons: 'Edit', 'Copy', and 'Close'. Below the title, a legend indicates that an asterisk (*) denotes required fields. The main content area is titled 'General Position Information' and contains the following data:

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

Figure 2.7.1 – Position Detail Screenshot – Reference only.

2.7.3 Description of Changes

5. 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.
6. 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.

2.7.4 Page Location

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

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

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

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 Workload Reassignment Detail

2.8.1 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.

2.8.2 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: * Language: *

- Select - Any

Case Flag: Status:

- Select - -

To:


Worker ID: Select

Unit Office: Select Unit: -

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

2.8.3 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.

2.8.4 Page Location

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

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Batch Regression Test

2.9.1 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 2.8.3 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.

2.9.2 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.

2.9.3 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

No change.

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 Update the Life Cycle Reassignment Batch Job

2.10.1 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 2.10.1 – Current End Worker Assignment Logic

System	Program	Program Status	Program Status Reason	End Worker Assignment on...
C-IV	All programs	Discontinued, Denied, Deregistered	All Program Status Reasons excluding 'Exempt'	Same day of program status effective date
CalSAWS	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	All Program Status Reasons	Same day of program status effective date
CalSAWS	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	All Program Status Reasons excluding 'Exempt'	1 st day of the following month after the Discontinued/Deregistered effective begin date
CalSAWS	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	All Program Status Reasons excluding 'Exempt'	31 st day after the Denial action date
CalSAWS	Medi-Cal	Discontinued	All Program Status Reasons excluding 'Exempt'	90 th day after the Discontinued effective begin date
CalSAWS	WTW/REP	Sanctioned	All Program Status Reasons	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.

2.10.2 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 2.10.2.2. 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 2.10.2.1 – End Worker Assignment Logic Reference

Migration County	Program	Program Status	Program Status Reason	Rules
57 Migration Counties	All	Discontinued, Denied, Deregistered	All Program Status Reasons excluding 'Exempt'	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See example #5 below.
Los Angeles	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	All Program Status Reasons	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	All Program Status Reasons	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See example #3 below.

Migration County	Program	Program Status	Program Status Reason	Rules
Los Angeles	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	All Program Status Reasons excluding 'Exempt'	End-date worker assignment after 1 full calendar month of the Program status begin date (effective date). 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> .
Los Angeles	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	All Program Status Reasons excluding 'Exempt'	End-date worker assignment 31 days after the Denial creation/action date. See <i>example #2 below</i> .
Los Angeles	Medi-Cal	Discontinued	All Program Status Reasons excluding 'Exempt'	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 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.

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.

2.10.3 Execution Frequency

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

2.10.4 Key Scheduling Dependencies

No Change.

2.10.5 Counties Impacted

All Counties.

2.10.6 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.

2.10.7 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...)

2.11 Eligibility Workload Inventory Export

2.11.1 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.

2.12 Automated Regression Test

2.12.1 Overview

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

2.12.2 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-207312 | DDID 1476, 1775, 2303

Consolidate Central Print Process for all 58
Counties

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/25/2021	1.0	Initial Revision	Rainier Dela Cruz
02/24/2021	1.1	Updates per QA comments	Rainier Dela Cruz
03/01/2021	1.2	Added assumption about the GEN 1365.	Rainier Dela Cruz
03/10/2021	1.3	Added recommendations to update the Generate NOA batch jobs to run for all counties.	Rainier Dela Cruz
03/18/2021	1.4	Removed recommendation to conduct central print testing. The recommendation is being moved to CA-218205.	Rainier Dela Cruz
04/28/2021	1.5	Removed the recommendation to shift the current insertion barcode and added a recommendation to add a QR barcode on the upper left edge of the document, like the insertion barcode in C-IV.	Rainier Dela Cruz
5/10/2021	1.6	Added recommendation to schedule the FTP Jobs for the C-IV Counties and create the jobs for the CalWIN Counties.	Rainier Dela Cruz

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1 OVERVIEW

1.1 Current Design

Currently in C-IV, there are three mailing priorities: 0, 1, or 4. Priority 0 is used for the SAR7/SAR2 form, priority 4 is used for the redetermination (RE) packets, and other forms and Notices of Action (NOAs) are assigned priority 1. There is a batch process for each of the mailing priority to bundle forms and NOAs together.

In CalSAWS, there are ten mailing priorities, from 0 to 9. Priority 0 is used for the SAR7/SAR2 form, priority 2 is used for the PA 6049 form, and priority 3 is used for the PA 320 form. Priority 4 is used for the redetermination (RE) packets and priority 5 are used for the MC 176 TMC form. For priorities 6 and 7, they are used for controlled forms. A prepaid envelope is included with priority 6 forms and a non-prepaid envelope is included with priority 7 forms. Priority 8 is used for MAGI NOAs and priority 9 is used for Department of Family and Children Services (DCFS) Blue Voucher. Other forms and NOAs are assigned priority 1. Like C-IV, there is a batch process for each of the mailing priority to bundle the forms and NOAs together. However, they currently only run for Los Angeles County.

1.2 Requests

Consolidate the Central Print process for all 58 counties by consolidating the mailing priorities and replicating the existing bundling batch processes in CalSAWS for the migration counties.

1.3 Overview of Recommendations

1. Update the mailing priority for forms and NOAs.
2. Update the Generate NOA batch processes to run for all counties.
3. Schedule the bundling and print file batch processes for the C-IV Counties.
4. Create new bundling and print file batch processes for the CalWIN Counties.
5. Update the bundling batch property to increase the maximum page limit for the flat mail and standard mail envelopes.
6. Update the naming convention for the bundles to not include the agency code for the migration counties.
7. Update the location of the insertion barcode to match Add a new 2D QR insertion barcode on the upper left edge of the document, like the insertion barcode in C-IV.

~~8. Conduct central print testing with the new CalSAWS print vendor. Schedule the print file transfer batch processes for the C-IV Counties.~~

9. Create the print file transfer batch processes for the CalWIN Counties.

1.4 Assumptions

1. The bundle name for Los Angeles County will continue to include the agency code (DC for DCFS, DP for DPSS).
2. The only form with a mail priority of 2 is the PA 6049 (Customer Service Center ID Card). Since this form is only for Los Angeles County, the bundling batch processes for mail priority 2 will not be created for the migration counties.
3. The only form with a mail priority of 3 is the PA 320 (Vendor Service Order and Invoice). Since this form is only for Los Angeles County, the bundling batch processes for mail priority 3 will not be created for the migration counties.
4. The only form with a mail priority of 5 is the MC 176 TMC (Transitional Medi-Cal Quarterly Status Report). As part of SCR **CA-213514**, BRM will be added to the form and the mailing priority will be updated to 1. As a result, mail priority 5 will no longer be in use.
5. All the forms with a mail priority of 6 will be updated to include a BRM and the priority updated to 1 as part of SCR **CA-224183**. As a result, mail priority 6 will no longer be in use.
6. Forms with mailing priority of 7 and are for all counties will be updated to include a BRM and the priority updated to 1 as part of SCR **CA-224183**. SCR **CA-225229** will update the CW 86 to the 9/11 version, make it available to all counties, include a BRM and set the mailing priority to 1. Los Angeles County only forms will continue to be priority 7 and a non-prepaid envelope included at the print center. Since these forms are only for Los Angeles County, the bundling batch processes for mail priority 7 will not be created for the migration counties.
7. The MAGI NOAs are currently mail priority 8. These NOAs will be moved to mail priority 1. As a result, mail priority 8 will no longer be in use.
8. The only form with a mail priority of 9 is the DCFS 1800 (Blue Payment Voucher). Since this form is only for Los Angeles County, the bundling batch processes for mail priority 9 will not be created for the migration counties.
9. SCR **CA-218205** will turn on the functionality to include the GEN 1365 with all correspondence generated. The central print testing of the GEN 1365 and the updates to the mailing priorities will be conducted with this SCR.

10. SCR **CA-226573** will update the IP address of the file transfer batch job to the IP address of the new print vendor.

2 RECOMMENDATIONS

2.1 Update the Mailing Priority

2.1.1 Overview

Update the current mailing priority of the forms and NOAs.

2.1.2 Description of Change

1. Update the print dynamic NOA logic to set the mail priority to 01 for MAGI NOAs.
2. Update the mailing priority for the SAR 7 Addendum/SAR 2/SAR 7 form to priority 00.
3. Update the CF 285 as follows:
 - a. Update the mailing priority to 04.
 - b. Update the form to use the CalSAWS standard header (Header 1) when the form is generated for a case managed in Los Angeles County and to use Migration Counties' RE Packet header when the form is generated for a case managed in a migration county. By default, the Migration Counties' RE Packet header is displayed. The county code is passed in and the scripting determines which header is visible. For example, if the form is generated by Los Angeles County, the CalSAWS standard header is displayed, and the Migration Counties' RE Packet header is hidden. If the form is generated outside the context of the case (generating a blank template), use the worker that is generating the forms to determine the county code. An example of the CalSAWS standard header and the Migration Counties' RE Packet header are below.
4. Update the mailing priority for the CF 32 and the M40-107D forms to priority 01.
5. Update the mailing priority for the DCFS 6055, W-9, SAR 3, PA 6062 to priority 01.

Note: Currently, these forms have a mailing priority of 1, instead of 01.

COUNTY OF _____ _____ _____	STATE OF CALIFORNIA HEALTH AND HUMAN SERVICES AGENCY CALIFORNIA DEPARTMENT OF SOCIAL SERVICES
APPLICATION FOR CALFRESH BENEFITS	Date: _____ Case Name: _____ Case Number: _____ Worker Name: _____ Worker ID: _____ Worker Phone Number: _____ Customer ID: _____
_____ _____ _____	_____ _____ _____

Figure 2.1.1 – CalSAWS Standard Header

_____	COUNTY OF _____
_____	Date: _____
_____	Case Name: _____
_____	Case Number: _____
	Worker Name: _____
	Worker ID: _____
	Worker Phone Number: _____
	Customer ID: _____
_____ _____ _____	

Figure 2.1.2 – Migration Counties’ RE Packet Header

2.2 Update to Generate NOA Batch Jobs

2.2.1 Overview

The Generate NOA batch jobs find NOAs that are in 'Pending Review', 'Accepted – Print Centrally', or 'Hold for Pickup' where a PDF has not been generated and generates the PDF. It will also update the status from 'Pending Review' or 'Accepted – Print Centrally' to 'Printed Centrally'. The current batch jobs in CalSAWS only run for Los Angeles County. Update the batch jobs to run for all counties.

2.2.2 Description of Change

1. Update the Generate NOA batch sweep (PB19P599) to a '00' batch job and configure it to run for all counties.

2. Update the Dynamic NOA Balancing batch job (PB19P600) to a '00' batch job and configure it to run for all counties.
3. Update the Generate NOA thread jobs (PB19P601 – PB19P760) to a '00' job and configure them to run for all counties.
4. Add additional Generate NOA thread jobs so the total number of thread jobs is 300.

Technical Note: Currently, 100 threads are being used for Los Angeles County. The unused and additional threads will be used for the Migration Counties, 100 threads for the C-IV Counties and 100 threads for the CalWIN Counties.

2.2.3 Execution Frequency

No change.

2.2.4 Key Scheduling Dependencies

No change.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

Approximately 1,200,000 records are processed monthly by Generate NOA batch jobs. Please note that the number of records processed by each job is an approximation, and this number may vary.

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Schedule the Bundling Batch Jobs for the C-IV Counties

2.3.1 Overview

The bundling batch jobs for the C-IV Counties currently exist in CalSAWS but are not scheduled to run. Update the scheduling of these jobs to run daily.

2.3.2 Description of Change

1. Schedule the following batch jobs for the C-IV Counties:
 - a. PBXXP400 – Priority 0 Bundling Job
 - b. PBXXP401 – Priority 1 Bundling Job
 - c. PBXXP404 – Priority 4 Bundling Job

Note: The 'XX' denotes the county code. For example, PB36P400 is the priority 0 bundling job for San Bernardino.

2.3.3 Execution Frequency

These batch jobs run daily.

2.3.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs.

2.3.5 Counties Impacted

C-IV Migration Counties.

2.3.6 Data Volume/Performance

Approximately 60,000 records are processed monthly by the PBXXP400 job. Approximately 1,620,000 records are processed monthly by the PBXXP401 job. Approximately 134,000 records are processed monthly by the PBXXP404 job. Please note that the number of records processed by each job is an approximation, and this number may vary.

2.3.7 Failure Procedure/Operational Instructions

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

2.4 Schedule the Print File Batch Jobs for the C-IV Migration Counties

2.4.1 Overview

The print file batch jobs scan the generate document table to find forms and NOAs that are printed centrally. It creates an entry in the print file table with information such as mailing priority, customer name, document name, outgoing envelope type, etc. for each document. This information is used by the bundling jobs. These batch jobs for the C-IV Migration Counties currently exist in CalSAWS but are not scheduled to run. Update the scheduling of these jobs to run daily.

2.4.2 Description of Change

1. Schedule the following batch jobs for the C-IV Migration Counties:
 - a. PBXXP200 – Print File Job for Forms
 - b. PBXXP300 – Print File Job for NOAs

2.4.3 Execution Frequency

These batch jobs run daily.

2.4.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs.

2.4.5 Counties Impacted

C-IV Migration Counties.

2.4.6 Data Volume/Performance

Approximately 977,000 records are processed monthly by the PBXXP200 job. Approximately 832,000 records are processed monthly by the PBXXP300 job. Please note that the number of records processed by each job is an approximation, and this number may vary.

2.4.7 Failure Procedure/Operational Instructions

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

2.5 Schedule the Print File Transfer Batch Jobs for the C-IV Migration Counties

2.5.1 Overview

The print file transfer batch jobs are responsible for sending the bundles over to the print center to be printed. The jobs exist for the C-IV Migration Counties but are not scheduled to run. Schedule the file transfer batch jobs.

2.5.2 Description of Change

1. Schedule the batch jobs for the C-IV Migration Counties:
 - a. PBXXP500
 - b. PBXXP501
 - c. PBXXP504
 - d. PBXXP420

- e. PBXXP421
- f. PBXXP424

Note: The 'XX' denotes the county code. For example, PB36P500 is the file transfer job for San Bernardino County.

2.5.3 Execution Frequency

These batch jobs run daily.

2.5.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs.

2.5.5 Counties Impacted

C-IV Migration Counties.

2.5.6 Data Volume/Performance

Approximately 5,000 bundles are transferred monthly by the PBXXP500 job.

2.5.7 Failure Procedure/Operational Instructions

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

2.6 Create the Bundling Batch Jobs for the CalWIN Migration Counties

2.6.1 Overview

The bundling batch jobs do not exist for the CalWIN Migration Counties in CalSAWS. Create the batch jobs for the CalWIN Migration Counties.

2.6.2 Description of Change

1. Create the following batch jobs for the CalWIN Migration Counties.
 - a. PBXXP400 – Priority 0 Bundling Job
 - b. PBXXP401 – Priority 1 Bundling Job
 - c. PBXXP404 – Priority 4 Bundling Job

2.6.3 Execution Frequency

These batch jobs run daily.

2.6.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs.

2.6.5 Counties Impacted

CalWIN Migration Counties.

2.6.6 Data Volume/Performance

The information for the CalWIN Migration Counties is not currently available, however, it is expected to approximately process the same number of records as the C-IV Migration Counties.

2.6.7 Failure Procedure/Operational Instructions

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

2.7 Create the Print File Batch Jobs for the CalWIN Migration Counties

2.7.1 Overview

The print file batch jobs do not exist for the CalWIN Migration Counties in CalSAWS. Create the batch jobs for the CalWIN Migration Counties.

2.7.2 Description of Change

1. Create the following batch jobs for the CalWIN Migration Counties:
 - a. PBXXP200 – Print File Job for Forms
 - b. PBXXP300 – Print File Job for NOAs

2.7.3 Execution Frequency

These batch jobs run daily.

2.7.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs.

2.7.5 Counties Impacted

CalWIN Migration Counties.

2.7.6 Data Volume/Performance

The information for the CalWIN Migration Counties is not currently available, however, it is expected to approximately process the same number of records as the C-IV Counties.

2.7.7 Failure Procedure/Operational Instructions

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

2.8 Create the Print File Transfer Batch Jobs for the CalWIN Migration Counties

2.8.1 Overview

The print file transfer jobs currently do not exist for the CalWIN Migration Counties in CalSAWS. Create the file transfer jobs for the CalWIN Migration Counties.

2.8.2 Description of Change

1. Create the following print file transfer batch jobs for the CalWIN Migration Counties.
 - a. PBXXP500
 - b. PBXXP501
 - c. PBXXP504
 - d. PBXXP420
 - e. PBXXP421
 - f. PBXXP424

Note: The 'XX' denotes the county code. For example, PB34P500 is the file transfer job for Sacramento County.

2.8.3 Execution Frequency

These batch jobs run daily.

2.8.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs.

2.8.5 Counties Impacted

CalWIN Migration Counties.

2.8.6 Data Volume/Performance

The information for the CalWIN Migration Counties is not currently available, however, it is expected to approximately process the same number of records as the C-IV Counties.

2.8.7 Failure Procedure/Operational Instructions

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

2.9 Update the Bundling Batch Job Property

2.9.1 Overview

Currently in CalSAWS, the maximum number of pages for the standard mail envelopes is 8 and the maximum number of pages for the flat mail envelopes is 20. Update the bundling batch properties to increase the maximum number of pages for the flat mail and standard mail envelopes.

2.9.2 Description of Change

1. Update the batch property to increase the maximum page limit to 24 physical pages for flat mail envelopes.
2. Update the batch property to increase the maximum page limit to 9 physical pages for standard mail envelopes.

2.10 Update the Bundle Naming Convention

2.10.1 Overview

Currently, the bundle name includes the following information: Date (MMddyyyy_HHmms format), the county code, the agency code, priority, outgoing envelope, return envelope, recertification, or redetermination packet name, language code, and the bundler index. Update the logic that constructs the bundle name to **not** include the agency code for the bundles generated for the Migration Counties.

2.10.2 Description of Change

1. Update the column in the Print File table that stores the Agency Code to be nullable.

2. Update the name construction logic to include the agency code in the bundle name for only the bundles created for Los Angeles County. An example of a Los Angeles County bundle name is '**01272021_102401_19_DP_1_SM_NO_001.pdf**'. An example of a bundle name for a Migration County is '**01272021_102401_36_1_SM_NO_001.pdf**'.

2.11 Update the Insertion Barcode Location

2.11.1 Overview

The insertion barcode is used by the central print vendor to identify which documents to insert in an envelope. Currently in CalSAWS, this barcode is located at the lower left edge of the document. The new central print vendor has requested the insertion barcode be moved to the top 1/3 of the document. Update the location of the insertion barcode to match a new QR insertion barcode be placed at the upper left edge of the document, like the insertion barcode in C-IV.

2.11.2 Description of Change

1. Update the location of the insertion barcode to match Add a new 2D QR insertion barcode on the upper left edge of the document, like the insertion barcode in C-IV.
2. Conduct central print testing with the **current** print vendor to test the new location of the insertion barcode. As part of central print testing, generate Approval, Benefit Change, Denial and Discontinuance NOAs for CalFresh, CalWORKs and Medi-Cal, generate all the RE packets, and generate the following forms:

Note: The central print testing with the new print vendor to test the new location of the insertion barcode will be conducted with SCR **CA-218205**.

Form Number	Form Name
ADM 101 - LA	New Worker Letter
PA 2492	Payment Verification System (PVS) Participant Contact Letter
CW 2200	Request for Verification
SAR 2	Reporting Changes for Cash Aid and CalFresh
MC Reminder Notice	MC Reminder Notice

SAR 7	Eligibility Status Report
PA 6174	CalFresh Solicitation Letter
CF 386	Notice of Missed Interview
PA 6050	Customer Service Center PIN Mailer
PA 6049	Customer Service Center ID Card
CF 377.2	CalFresh Notice of Expiration of Certification
CF 1	Notice to CalFresh Recipients
NA 960X SAR	CW/RCA/CF SAR 7 - Not Received
MC 355	Medi-Cal Request for Information
MC 355 Reminder	Medi-Cal Request for Information Reminder Notice
PA 2418B	IEVS-IFDS/NHR Statement Regarding Employment for Discontinued Participants
CF 29A	CalFresh Initial Appointment Letter
AR 2	Reporting Change for CalWORKs and CalFresh
SAWS 30	Notification of New Employment
SSP 14	Authorization for Reimbursement of Interim Assistance Initial Claim or Post-eligibility Case
NA 820	Approval of Transportation
TEMP NA 1232-1	EBT Account - CalFresh Notice

2.12 Central Print Testing

2.12.1 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 print vendor to be printed.

2.12.2 Description of Change

3. 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.~~
- 4. ~~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. ~~TEXT 100 (Text Notification Agreement)~~
 - viii. ~~TEXT 101 (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~~
- 5. ~~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).~~
- 6. ~~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.~~
- ~~7. 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~~~~
- ~~8. 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.~~
- ~~9. 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 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	List of forms with the associated mailing priority.	ListOfFormsWithMailPriorities.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1476	<p>The CONTRACTOR shall consolidate the Central Print processes, Form and NOA bundling batch Jobs into one process for use by all 58 Counties in the CalSAWS Software.</p> <p>The CONTRACTOR shall support the ability for the 58 Counties to submit county requests for special mailings, and these would be funded directly by the requesting county.</p>	<p>- Performance/capacity testing with the central print vendor will be completed with each wave.</p>	<p>Consolidated the mailing priorities in CalSAWS and replicated the print file and bundling batch processes currently in CalSAWS for the Migration Counties.</p>
1775	<p>The CONTRACTOR shall update the technical architecture to support consolidation of the bundling jobs and bar codes (Stuffing, Intelligent mail, Imaging and Tracking) for one central print vendor.</p>	<p>- A single central print vendor is identified and is in place to handle the print jobs. This estimate and assumption may change when we receive further information about printing and print vendor.</p> <p>- The consolidated CalSAWS Imaging solution and requirements are pending the outcome of the Functional Design Sessions. Once the requirements are finalized this requirement will be revisited to determine if there are any impacts to the scope, estimate or migration timeline.</p>	<p>Conducted central print testing with the print vendor to validate the updates to the technical architecture for bundling jobs and barcodes.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2303	The CONTRACTOR shall standardize a set of barcodes to allow automatic printing, folding, and mailing of materials and add those barcodes to all forms before they are sent to printing.	- Barcode type and data inserted into the barcode will be determined based on the selected print vendor's needs for automated printing, folding, and mailing.	Conducted central print testing with the print vendor to validate the placement of the barcodes.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214896

DDID 1629

Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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04/01/2021	1.1	Content Revision #1 <ul style="list-style-type: none"> • Updated Automated Action #1 • Updated recommendation #15 • Updated Automated Action 2.1.3.9.a.iii • Included recommendation #16 to update Program attribute of an Automated Action 	Mayuri Srinivas
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1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2 RECOMMENDATIONS

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

2.1 Update CalSAWS Automated Tasks Per Automated Action Framework

2.1.1 Overview

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

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

2.1.2 Automated Action Detail – Reference Example

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

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

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

Figure 2.1.1 – Automated Action Detail

2.1.3 Description of Changes

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

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

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

1. AAP Program: Placement Removal Date Received

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

a. Action Information

- i. Name: AAP Program: Placement Removal Date Received
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): AA
- v. Run Date: Daily(Mon-Fri)
- vi. Source: Batch
- vii. Scenario: An Adoption Assistance Program Placement Removal Date has been received. Review and take appropriate action.

b. Task Information

- i. Task Type: Received DCFS AAP record for case modification for Placement Removal Date.
- ii. Task Sub-Type: N/A

- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Adoption case information has been received for modification of PLACEMENT REMOVAL DATE as {PLACEMENT_REMOVAL_DATE}.

2. e-ICT Request: Received

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

a. Action Information

- i. Name: e-ICT Request: Received
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): All Programs
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: An e-ICT request has been received for a Case. Please review and take appropriate action.

b. Task Information

- i. Task Type: E-ICT Request Record Received
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: An e-ICT Request record was received from {county Name} County on {fileDate} for case {caseNumber} . Please update new address and transfer case.

3. e-ICT Disposition: Received

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

a. Action Information

- i. Name: e-ICT Disposition: Received
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): All Programs
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch

- vii. Scenario: An e-ICT disposition has been received for a Case. Please review and take appropriate action.

b. Task Information

- i. Task Type: E-ICT Disposition record received
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: An e-ICT Disposition record was received from {county Name} County on {fileDate} for case {caseNumber} . Please review disposition record and take appropriate action on the case.

4. e-ICT Disposition: Not Received

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

a. Action Information

- i. Name: e-ICT Disposition: Not Received
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): All Programs
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: An e-ICT disposition has not been received from the sending county and it has been 20 days since the e-ICT was initiated. Please review and take appropriate action.

b. Task Information

- i. Task Type: Pending eICT Disposition
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: A Disposition record has not been received from {countyName} County after 20 days from the ICT initiated date {fileDate}. Please review and take appropriate action.

5. e-ICT Cancellation: Received

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

a. Action Information

- i. Name: e-ICT Cancellation: Received
- ii. Type: Create Task

- iii. Status: Active
 - iv. Program(s): All Programs
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: An e-ICT cancellation record was received from the sending county.
- b. Task Information
- i. Task Type: E-ICT Cancellation record Received
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: An e-ICT Cancellation record was received from {county Name} County on {fileDate} for case {caseNumber} . Please cancel the case.
6. e-ICT: Document Request Received
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.
- a. Action Information
- i. Name: e-ICT: Document Request Received
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): CW, MC, CF, RC
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: An ICT document request has been received.
- b. Task Information
- i. Task Type: ICT Document Request Received
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 10 days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: A new Image Document Request with document type(s) {Document Type List} was received for e-ICT {eICT ID}.
7. ICT Document(s) Not Found
- a. Action Information
- i. Name: ICT Document(s) Not Found
 - ii. Type: Create Task
 - iii. Status: Active

- iv. Program(s): CW, MC, CF, RC
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: ICT document(s) could not be sent to the receiving county. Take appropriate action.

b. Task Information

- i. Task Type: ICT Documents(s) Not Found
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 1 day
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Image or Document with document type(s) {Document Types List} could not be sent to receiving county for e-ICT {eICT ID}. Documents were not found in the imaging system for these document type(s).

8. Batch EDBC SSI/SSP Reversal Skip

a. Action Information

- i. Name: Batch EDBC SSI/SSP Reversal Skip
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): CF
- v. Run Date: Daily(Mon-Sat)
- vi. Source: Batch
- vii. Scenario: Batch EDBC has skipped due to reversing an SSI/SSP recipient and the Batch EDBC is running for CalFresh when a SAR 7 is received with no changes.

b. Task Information

- i. Task Type: Batch EDBC Skipped No Touch SAR 7 - SSI Reversal
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 3 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Review data and run EDBC for {Benefit Month}. Batch Eligibility did not process this because CalFresh EDBC attempted to reverse an excluded SSI/SSP recipient.

9. Clearance/Intake Tasks

Clearance and Intake Tasks are tied to additional processing in the CalSAWS System outside of simply Task generation. For example, if an application is received, CalSAWS processing will create a Clearance

Task associated to the application. When a worker takes action to work this Task and create a Case/Program, the system will automatically close the Clearance Task and create an Intake Task assigned to the program worker. This process is orchestrated with very specific logic within the CalSAWS System. As a result, Clearance and Intake Tasks will be moved into the Automated Action framework as described in this section. The Task Types for each automated action will be configured for each of the 58 counties.

a. Automated Actions

i. Clearance

1. Action Information

- a. Name: Clearance
- b. Type: Create Task
- c. Status: Active
- d. Program(s): All Programs
- e. Run Date: Real Time
- f. Source: Online
- g. Scenario: A new application has been received. Please review and take appropriate action.

2. Task Information

- a. Task Type: Clearance
- b. Task Sub-Type: N/A
- c. Due Date: Default Due Date
- d. Default Due Date: 1 day
- e. Initial Assignment: Default Assignment
- f. Default Assignment: Office Distribution
- g. Long Description: Clearance

ii. Clearance: ICT

1. Action Information

- a. Name: Clearance: ICT
- b. Type: Create Task
- c. Status: Active
- d. Program(s): All Programs
- e. Run Date: Daily(Mon-Sat)
- f. Source: Batch
- g. Scenario: An e-ICT request has been received for the clearance process. Please review and take appropriate action.

2. Task Information

- a. Task Type: Clearance ICT
- b. Task Sub-Type: N/A

- c. Due Date: Default Due Date
 - d. Default Due Date: 1 day
 - e. Initial Assignment: Default Assignment
 - f. Default Assignment: ICT Bank
 - g. Long Description: Clearance ICT
3. The current assignment logic for this automated Task selects a Bank that is associated to the recipient's closest office and the Bank can receive Tasks of Category "e-ICT". The Default Assignment value of "ICT Bank" replicates this same assignment processing.
- iii. Clearance: e-Application
- 1. Action Information
 - a. Name: Clearance: e-Application
 - b. Type: Create Task
 - c. Status: Active
 - d. Program(s): CW, CF, GR, MC
 - e. Run Date: Real Time
 - f. Source: Online
 - g. Scenario: An e-Application has been received for the clearance process. Please review and take appropriate action.
 - 2. Task Information
 - a. Task Type: Clearance e-Application
 - b. Task Sub-Type: N/A
 - c. Due Date: Default Due Date
 - d. Default Due Date: 1 day
 - e. Initial Assignment: Default Assignment
 - f. Default Assignment: e-Application Bank
 - g. Long Description: Clearance e-Application
 - 3. Rename the "Clearance YBN" Task Type for Los Angeles County to be "Clearance e-Application".
 - 4. Rename the "YBN" Task Category to be "e-Application". This adjustment is strictly cosmetic and does not impact underlying functionality.
 - 5. The current assignment logic for this automated Task selects a Bank that is associated to the recipient's closest office and the Bank can receive Tasks of Category "e-Application". The Default Assignment value of "e-Application Bank" replicates this same assignment processing.

iv. Intake

1. Action Information

- a. Name: Intake
- b. Type: Create Task
- c. Status: Active
- d. Program(s): All Programs
- e. Run Date: Real Time
- f. Source: Online
- g. Scenario: A new application has been processed resulting in a program assignment. Please review and take appropriate action.

2. Task Information

- a. Task Type: Intake
- b. Task Sub-Type: N/A
- c. Due Date: Default Due Date
- d. Default Due Date: 20 days
- e. Initial Assignment: Default Assignment
- f. Default Assignment: Current Program Worker
- g. Long Description: Intake

v. CMIPS II: Clearance

This task was moved to the Automated Action framework with CA-214898. For consistency, update the Automated Action name to be "Clearance: CMIPSII".

b. Web Pages

The Clearance and Intake Automated Actions will be read only except for the Status field allowing activation/deactivation of the Automated Action. Similarly, the existing Clearance and Intake Task Types will be read only. This is to maintain current functionality that supports Clearance and Intake tasks.

i. Automated Action Detail Page

- 1. Update the Automated Action Detail page to only allow editing of the Status field for the Clearance and Intake Automated Actions described in this recommendation (2.1.3.9).

ii. Task Type List Page

1. Update the Task Type List Page to not display the remove checkbox or the Edit button for the following Clearance and Intake Task Types:
 - a. Clearance
 - b. Clearance ICT
 - c. Clearance CMIPSII
 - d. Clearance e-Application (formerly Clearance YBN)
 - e. Intake

iii. Task Type Detail Page

1. Update the Task Type Detail page to not display the Edit button for the following Clearance and Intake Task Types:
 - a. Clearance
 - b. Clearance ICT
 - c. Clearance CMIPSII
 - d. Clearance e-Application (formerly Clearance YBN)
 - e. Intake

10. Living Arrangement: Homeless Ended

This Automated Action was previously introduced with CA-214897.

- a. Update the Default Assignment attribute for this Automated Action to "WTW Services Worker". The underlying logic for assignment is not being modified. This is a cosmetic update only to align with current processing.

11. CalWORKs Program: New Child Added

This Automated Action was previously introduced with CA-214897.

- a. Update the Program(s) attribute for this Automated Action to "CC, CW".
- b. Update the Scenario attribute for this Automated Action to "A new child has been added to a Child Care program associated to a Case with a CalWORKs program."

Note: These modifications are purely cosmetic and does not affect underlying functionality.

12. Generated Document Failed: Review

This Automated Action was previously introduced with CA-214895.

- a. Update the Scenario attribute for this Automated Action to "A NOA or form was not produced as part of the Generated

Document Batch process. Review the case for missing Primary Applicant (PA) and/or Primary Applicant Mailing Address."

- b. Update the Long Description attribute for this Automated Action to "Form/NOA generation failed for either no Primary Applicant (PA) and/or No PA Mailing Address."

Note: The above recommendations apply to both the Online and Batch instances of the "Generated Document Failed: Review" Automated Action.

13. Foster Care Program: Child Placement End Dated

This Automated Action was previously introduced with CA-214898. The Automated Action was staged for all 58 counties, however the batch process to trigger this Automated Action was not modified to function for all counties.

- a. Update the batch process that triggers this Automated Action to function for all 58 counties.

14. Authorization Task Types

Update Authorization Task Types to be read only. Authorization functionality is imbedded within the logic of the CalSAWS System and will not be configurable outside of the County Authorizations page.

- a. Update the Task Type List Page to not display the remove checkbox or the Edit button for Authorization Task Types. Reference Appendix 7.1 for the specific list of Task Types.
- b. Update the Task Detail Page to not display the Edit button for Authorization Task Types. Reference Appendix 7.1 for the specific list of Task Types. These Task Types will be view only.

Note: The Authorization Task Types in Appendix 7.1 will be available for each of the 58 counties.

15. Modify the following Los Angeles County Task Types in the CalSAWS System to function as custom Task Types. With this recommendation, the Task Type List page will display a selectable checkbox for any of the below Task Types that are not associated to a Task. The selectable checkbox will allow the county to remove the Task Types via the Remove button.

- a. Clearance CalHEERS
- b. Intake CalHEERS
- c. Intake CMIPSII
- d. Intake ICT

e. Intake YBN

Technical: End date the associated code table entries in category 399 for the 5 referenced Task Types.

16. Adoption Assistance Program: Case Created

This Automated Action was previously introduced with CA- 214898.

a. Update the Program(s) attribute for this Automated Action to "AA".

Note: These modifications are purely cosmetic and does not affect underlying functionality.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1629	The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.	- Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county. - Support for mapping CalWIN automated tasks to LRS automated tasks is not included.	A fourth population of automated Tasks in LRS/CalSAWS are being converted into the Automated Action framework with this enhancement. This is the fourth phase of DDID 1629.

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

N/A

6 OUTREACH

N/A

7 APPENDIX

7.1 Authorization Task Types

- Computation Request Rejected
- Deputy Authorization - Invoice
- Deputy Authorization - Issuance Replacement/Reissue
- Deputy Authorization - Payment Request (Lvl 1)
- Deputy Authorization - Payment Request (Lvl 2)
- Deputy Authorization - Transaction Refund
- Deputy Authorization - Valuable (Lvl 1)
- Deputy Authorization - Valuable (Lvl 2)
- Deputy Authorization EDBC
- External Recovery Account Disapproved
- Fraud Supervisor Authorization - Computation Request
- Generate Manual NOAs
- Interest Allocation Rejected
- Issuance Method Disapproved
- Issuance Replacement/Reissue Disapproved
- Payment Request Disapproved
- ReRun EDBC
- Supervising Clerk Authorization - Computation Request
- Supervisor Approval - Interest Allocation
- Supervisor Authorization - External Recovery Account
- Supervisor Authorization - Invoice
- Supervisor Authorization - Issuance Method
- Supervisor Authorization - Issuance Replacement/Reissue
- Supervisor Authorization - Payment Request
- Supervisor Authorization - Transaction Refund
- Supervisor Authorization - Valuable
- Supervisor Authorization EDBC
- Transaction Refund Disapproved
- Auxiliary Authorization – Awaiting Approval (L1)
- Auxiliary Authorization – Awaiting Approval (L2)
- Auxiliary Authorization – Disapproved

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216432

Updates to MAGI, Non-MAGI, and Mixed Medi-Cal Prepopulated RE Packets

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz, Connor Gory
	Reviewed By	Priya Sridharan, William Baretsky, Geetha Ramalingam, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/11/2020	1.0	Initial Revision	Rainier Dela Cruz
03/08/2021	1.1	Added recommendation to update the County Contact/TTY phone number for additional counties and to add a recommendation to update the MAGI Discontinuance for EDR batch job.	Rainier Dela Cruz
04/13/2021	1.2	Added a design clarification on the new portal URL.	Rainier Dela Cruz
04/22/2021	1.3	Updated the key scheduling dependencies for the RE packet batch jobs to state the correct batch job numbers.	Rainier Dela Cruz
04/27/2021	1.4	Added a content revision to update the reprint functionality.	Rainier Dela Cruz

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1 OVERVIEW

All County Welfare Director Letter (ACWDL) 20-21 and Medi-Cal Eligibility Division Information Letter (MEDIL) 20-39 provided the templates for the prepopulated Medi-Cal (MC) annual renewal forms that are sent to Modified Adjusted Gross Income (MAGI) and Non-MAGI MC beneficiaries who do not have their MC automatically renewed. ACWDL 20-21 provided the updated MAGI MC 216, the updated Non-MAGI MC 210 RV forms and MEDIL 20-39 provided the new Mixed Household MC 217 form.

This system change request (SCR) outlines the updates to the current redetermination (RE) packets and batch processes in CalSAWS and planned for the 21.07 Release. However, the updates will **not** be visible in the system **until the Go-Live of the C-IV counties** in CalSAWS. The updated forms and RE packets will not be available in Template Repository until that date and the updated batch processes will not run until the October 2021 benefit month.

1.1 Current Design

Currently in CalSAWS, there are multiple RE packets available in the Template Repository and are also sent out through the automated batch processes. The following packets are available in the system: MC Redetermination Packet, MC Packet, MAGI MC Packet, Mixed MC RE Packet, MC LTC Packet, MSP Packet, MC 604 IPS Packet, Pre-ACA MC RE Packet.

In C-IV, there are also multiple RE packets available in Template Repository and sent out through the automated batch processes. However, these packets will not be migrated over to the CalSAWS system. The Migration Counties will use the new packets once the counties go live in CalSAWS.

1.2 Requests

Update the MAGI MC Packet, MC Packet, and Mixed MC RE packet with the prepopulated forms provided by ACWDL 20-21 and update the packet names to MAGI RE Packet, Non-MAGI RE Packet and Mixed Household RE Packet.

1.3 Overview of Recommendations

1. Remove the following redetermination packets from Template Repository and associated batch processes: MC Redetermination, MC LTC Packet, MSP Packet, MC 604 IPS Packet and Pre-ACA MC RE Packet.
2. Update the MC 216 form to the 10/20 revision.
3. Update the MC 210 RV form to the 10/20 revision.
4. Add the MC 217 (10/20) form.

5. Update the MC 003 form to the 11/12 revision.
6. Update the PUB 13 to the to the 08/20 revision.
7. Update the PUB 183 to the 09/15 revision and the PUB 184 to the 01/17 revision.
8. Update the MC 216 form in the existing MAGI MC Packet for Los Angeles County and update the name of the packet to MAGI RE Packet.
9. Add a new MAGI RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: **MC 216 (10/20), MC 019 (02/15), MC 219 (11/15), MC 372 (09/09), PUB 13 (08/20), PUB 183 (09/15)/PUB 184 (01/17) and MC 003 (11/12).**
10. Update the MC 210 RV form in the existing MC Packet for Los Angeles County and update the packet name to Non-MAGI RE Packet.
11. Add a new Non-MAGI RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: **MC 210 RV (10/20), MC 019 (02/15), MC 219 (11/15), MC 372 (09/09), MC 007 (07/19), DHCS 7077 (12/18), DHCS 7077-A (05/07), PUB 13 (08/20), PUB 183 (09/15)/PUB 184 (01/17) and MC 003 (11/12).**
12. Update the existing Mixed MC RE Packet to use the new MC 217 form for Los Angeles County and update the packet name to Mixed Household RE Packet.
13. Add a new Mixed Household RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: **MC 217 (10/20), MC 019 (02/15), MC 219 (11/15), MC 372 (09/09), MC 007 (07/19), DHCS 7077 (12/18), DHCS 7077-A (05/07), PUB 13 (08/20), PUB 183 (09/15)/PUB 184 (01/17) and MC 003 (11/12).**
14. Create a new batch process to send out the MAGI RE packet for the Migration Counties.
15. Create a new batch process to send out the Non-MAGI RE packet for the Migration Counties.
16. Create a new batch process to send out the Mixed Household RE packet for the Migration Counties.

17. Update the existing batch process that sends out MAGI, Non-MAGI, and Mixed Household RE packet to remove references to the packets that are being removed.
18. Update the MAGI Discontinuance for Eligibility Determination Request (EDR) batch process to look for the MAGI RE packet and Mixed Household RE packet for both Los Angeles County and Migration Counties.
19. Update the reprint functionality to prevent the MC RE packets that will be removed to be reprinted centrally and locally.

1.4 Assumptions

1. The updates to the redetermination packets and batch processes outlined by this SCR will be part of the 21.07 Release but the changes will not be visible in the system until the Go Live Date of the C-IV Counties and after the existing packets for Los Angeles County has gone out in September for the RE due in November. The new packets will go out for all counties in October for RE due in December.
2. The MAGI, Non-MAGI, and Mixed Household RE packets will be implemented in only English and Spanish. The packets will be implemented in the other CalSAWS supported threshold languages by SCR **CA-223571**.
3. The PUB 183/PUB 184 will be implemented in the other CalSAWS supported threshold languages by SCR **CA-217134**.
4. The update to the Enclosure functionality for the packets will be implemented with SCR **CA-218612**.
5. Los Angeles County will retain their current process of 'pre-stuffed' RE Packets, with only the Coversheet and renewal forms being generated out of CalSAWS. The remainder of the forms will continue to be pre-stuffed, and Los Angeles County will follow their existing processes to make any updates to the pre-stuffed forms.
6. The MAGI, Non-MAGI, and Mixed Household RE packets for Los Angeles County will use the generic journal entry.
7. The MAGI, Non-MAGI, and Mixed Household RE packets for Los Angeles County will be updated to populate the new portal URL with SCR **CA-224200**.
8. The maximum number of pages that can fit in a flat mail envelope is 25 physical pages (50 impression).

9. The GEN 1365 and the Voter Registration Card will be included at the Print Center.
10. The Medi-Cal RE Packet catch up batch process for the Migration Counties will be implemented with SCR **CA-225011**.
11. Per existing MC RE Packet batch process functionality, if there are multiple MC program blocks on the case, an RE Packet will be sent for each program.

2 RECOMMENDATIONS

2.1 Remove Existing Medi-Cal Redetermination Packets

2.1.1 Overview

This section covers the removal of existing Medi-Cal redetermination packets from Template Repository and turning off the batch processes that sends out the packets.

2.1.2 Description of Change

1. Remove the following redetermination packets from Template Repository the day before the **CalSAWS Go-Live date** of the C-IV counties:

Technical Note: *The C-IV cutover date is stored in CT2799 – Component Effective Date.*

- a. MC LTC Packet
- b. MSP Packet
- c. MC 604 IPS Packet
- d. MC Redetermination Packet

Note: *This packet is different from the MC Packet that also currently exists in the system.*

- e. Pre-ACA MC RE Packet

2. Turn off the following redetermination packet batch jobs the day before the **CalSAWS Go-Live date** of the C-IV counties:
 - a. Medi-Cal Redetermination Packet - LTC (PB19R531, PB19R525)
 - b. MR4 Medi-Cal Redetermination Packet - MSP (PB19R532, PB19R524)
 - c. MC 604 IPS Packet (PB00R527, PB19R522)
 - d. Medi-Cal Redetermination Packet - DQ (PB19R529)
 - e. Medi-Cal Pre ACA Redetermination Packet (PB19R528)

2.2 Update County Contact Numbers

2.2.1 Overview

SCR CA-207432 added the county contact numbers that populate on the existing MC 216. The contact primary number on the County Contact Number listed on the 'Correspondence' page for Mono County is blank and the existing phone numbers for Lake, Mendocino, Modoc, Monterey, and San Joaquin counties are not the up to date phone numbers. Update

the contact primary phone number or TTY/TDD phone number to the phone numbers provided by the counties.

2.2.2 Description of Change

1. Update the contact primary number to **(760) 924-1770** for Mono County.
2. Update the contact primary number to **(707) 995-4200** for Lake County.
3. Update the contact primary number to **(707) 463-7700** for Mendocino County.
4. Update the TTY/TDD phone number (stored in the 'Toll-Free Number' field) to **(800) 863-4155** for Modoc County.
5. Update the contact primary number to **(877) 410-8823** for Monterey County.
6. Update the contact primary number to **(209) 468-1000** for San Joaquin County.

2.3 Update the MC 216 Form

2.3.1 Overview

This section describes the updates to the MC 216 form.

State Form: MC 216

Current Program: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese, Korean, Mandarin, Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese.

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MC Renewal Form

Template Repository Visibility: All Counties

2.3.2 Description of Change

1. Update the MC 216 form to the 10/20 revision and turn off the threshold languages. The updated version of the MC 216 is not available in Template Repository **until the CalSAWS Go-Live of the C-IV counties.**

Form Number: MC 216

Form Name: MAGI MC Renewal Form

Updated Languages: English, Spanish

Updated Imaging Form Name: MAGI MC Renewal Form

Include NA Back 9: N

Form Mockups/Examples: Please refer to Supporting Documents #1

2. Update the population logic and add dynamic sections.
 - a. The variables are populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	RE Due Date	The field populates with the redetermination due date. Format: Month Day, Year	Y	Y	Y
Page 1 – Cover Page	County Phone Number	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 1 – Cover Page	County TTY Number	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Format: 1-XXX-XXX-XXXX (excluding 711 phone number)			
Page 1 – Cover Page	Recipient Mailing Address	This field populates with the mailing address of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository.	Y	Y	Y
Page 1 – Cover Page	Notice Date	This field populates with the date when the form was generated. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	Case Number	This field populates with the case name of the current case.	Y	Y	Y
Page 1 – Cover Page	Case Name	This field populates with the case number of the current case.	Y	Y	Y
Page 1 – Cover Page	Worker Name	This field populates with the name of the worker.	Y	Y	Y
Page 1 – Cover Page	Worker Phone Number	This field populates with phone number of the worker. Format: (###) ###-####	Y	Y	Y
Page 1 – Cover Page	Name	This field populates with the name of the person. Format: First, Middle, Last, Suffix	Y	Y	Y
Page 1 – Cover Page	Date of Birth	This field populates with the date of birth of the person.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Format: MM/DD/YYYY			
Page 1 – Cover Page	Portal Name	This field populates with the URL of the Self-Service Portal. If the case is managed in a migration county, this field populates with the URL of BenefitsCal (www.benefitscal.org). If case is managed in Los Angeles County, this field populates with the URL of YourBenefitsNow.	Y	Y	Y
Page 1 – Cover Page	Office Name	This field populates with the name of the office.	Y	Y	Y
Page 1 – Cover Page	Office Address	This field populates with the office address.	Y	Y	Y
Page 1 – Cover Page	Office Hours Begin	This field populates with the start time of the office hours. Format: X:XX am	Y	Y	Y
Page 1 – Cover Page	Office Hours End	This field populates with the end time of the office hours. Format: X:XX pm	Y	Y	Y
Page 2 – Contact Info	Name	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Note: The same person is used to populate the address, phone number, email, language fields on page 2 below.			
Page 2 – Contact Info	Home Address	This field populates with the person's physical address.	Y	Y	Y
Page 2 – Contact Info	Mailing Address	This field populates with the person's mailing address if it is different from the home address. If it is the same as the home address or if there is no mailing address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	Home Phone Number	This field populates with the person's home phone number. If there is no home phone number, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	Cell Phone Number	This field populates with the person's cell phone number. If there is no cell phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	Other Phone Number	This field populates with the person's other phone number. It populates the phone number based on the hierarchy below: <ul style="list-style-type: none"> • Message • Work • TDD • Fax • Toll Free 	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		If no phone number is available, this field will be blank. Format: (###) ###-####			
Page 2 – Contact Info	Email	This field populates with the person's email address. If there is no email address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	Written Language	This field populates with the person's written language.	Y	Y	Y
Page 2 – Contact Info	Spoken Language	This field populates with the person's spoken language.	Y	Y	Y
Page 2 – Contact Info	County Phone Number	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 2 – Contact Info	County TTY Number	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 3 – Household Members	Primary Person Name	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix			
Page 3 – Household Members	Household Person Name	This field populates with the name of household member other than the primary person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	Relationship Type	This field populates with the relationship of the household member to the primary person.	Y	Y	Y
Page 3 – Household Members	Address	This field populates with the home address of the household member.	Y	Y	Y
Page 4 – Tax Info	Tax Filer Name	This field populates with the name of the tax filer. This information is retrieved from the Tax Household record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 4 – Tax Info	Plan to File	This field populates with 'Yes' or 'No' if the person is planning to file taxes. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 4 – Tax Info	Expected to File	This field populates with 'Yes' or 'No' if the person is expected to file taxes. This information is retrieved	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		from the Tax Household record.			
Page 4 – Tax Info	Tax Filing Status	This field populates with the expected filing status of the person. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 6 - Income	Name	This field populates with the name (first, middle, last, and suffix) of the person on the income record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 6 - Income	Source of Income	This field populates with the source of the income.	Y	Y	Y
Page 6 - Income	Income Amount	This field populates with the income amount. Format: \$XX.XX	Y	Y	Y
Page 6 - Income	Frequency	This field populates the income frequency.	Y	Y	Y
Page 8 - Expenses	Name	This field populates with the name (first, middle, last, and suffix) of the person on the expense record.	Y	Y	Y
Page 8 - Expenses	Type of Expense	This field populates with the type of the expense.	Y	Y	Y
Page 8 - Expenses	Amount	This field populates with the amount of the expense. Format: \$XX.XX	Y	Y	Y
Page 8 - Expenses	Frequency	This field populates with the frequency of the expense.	Y	Y	Y
Page 9 – Medicare Coverage	Name	This field populates with the name (first, middle, last, and suffix)	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		on the Medicare record.			
Page 9 – Medicare Coverage	Part A Premium	This field populates with the Part A amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX	Y	Y	Y
Page 9 – Medicare Coverage	Part B Premium	This field populates with the Part B amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX	Y	Y	Y
Page 9 – Medicare Coverage	Part C Premium	This field is blank.	N	N	Y
Page 9 – Medicare Coverage	Part D Premium	This field populates with the Part D amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX	Y	Y	Y
Page 10 – Long Term Care	Name	The field populates with the name of the person in the LTC facility. This information is retrieved from the Living Arrangement record with the type of 'Nursing Home/Long Term Care'. Format: First, Middle, Last, and Suffix	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 10 – Long Term Care	Facility Name	This field populates with the name of the LTC facility.	Y	Y	Y
Page 10 – Long Term Care	Facility Address	This field populates with the person's physical address.	Y	Y	Y
Page 11 – Other Health Insurance	Name	This field populates with the name of the beneficiary or beneficiaries on the Other Health Care record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 11 – Other Health Insurance	Insurance Name	This field populates with the name of the insurance company. This is the health insurance company name when the health coverage type is 'All Other Health Coverage'. For the other types, this field is blank.	Y	Y	Y
Page 11 – Other Health Insurance	Type of Insurance	This field populates with the health coverage type.	Y	Y	Y
Page 11 – Other Health Insurance	Premium Amount	This field populates with the expense amount. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the expense amount displays under the Health Insurance	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Premium Expense section. Format: \$XX.XX			
Page 11 – Other Health Insurance	Frequency	This field populates with the frequency. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the frequency displays under the Health Insurance Premium Expense section.	Y	Y	Y
Page 13 – Info Reported	Incarcerated Name	This field populates with the name of the person who is incarcerated. This person is listed as incarcerated on the most recent DER but is not verified. Technical Note: This information can be found on the CalHEERS Verification table. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 13 – Info Reported	Deceased Name	This field populates with the name of the person who is deceased. This person is listed as deceased on the most recent DER but is not verified. Technical Note: This information can be found on the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		CalHEERS Verification table. Format: First, Middle, Last, and Suffix			

b. Make the following sections dynamic:

Section	Dynamic Section	Conditions
Page 1 – Cover Page	List of persons under the 'It's time to renew benefits for:' section.	This section contains a repeating row that repeats for each person active program person. The section will expand to fit the list of persons.
Page 3 – Household Members	List of household members under the 'Review your household member information' section.	This section initially contains three rows. If there are more than four persons, the row will repeat for each additional person.
Page 4 – Tax Info	List of tax filers under the 'Review your tax information' section.	This section initially contains two rows. The first row always displays the primary tax filer. If there are more than one non-primary tax filer, the row will repeat for each tax filer.
Page 6 - Income	List of incomes under the 'Review of income information' section.	This section initially contains three rows. If there are more than three income records, the row will repeat for each additional income record.
Page 8 - Expenses	List of expenses under the 'Review you expenses and deduction information' section.	This section initially contains two rows. If there are more than two expense records, the row will repeat for each additional expense record.
Page 9 – Medicare Coverage	The Medicare Coverage section.	This section displays on the form only if there is at least one Medicare record. If there are no records, the section is hidden.
Page 9 – Medicare Coverage	List of Medicare information under 'Review your Medicare information' section.	This section initially contains two rows. If there are more than two Medicare records, the row will repeat for each additional Medicare record.
Page 10 – Long Term Care	The Long Term Care section	This section displays on the form only if there is at least one Living Arrangement record for LTC.
Page 10 – Long Term Care	List of Long Term Care facilities under the 'Review your long-term care information' section.	This section initially contains two rows. If there are more than two Living Arrangement records for LTC, the row will repeat for each additional record.

Section	Dynamic Section	Conditions
Page 11 – Other Health Insurance	List of Other Health Insurance information under the 'Review your health insurance information' section.	This section initially contains two rows. If there are more than two Other Health Care records, the row will repeat for each additional record.
Page 12 – Household Changes	The Medicare section.	This section displays on the form if the Medicare Coverage section is hidden, otherwise, this section is hidden.
Page 12 – Household Changes	The Long Term Care section.	This section displays on the form if the Long Term Care section is hidden, otherwise, this section is hidden.
Page 13 – Info Reported	The Incarcerated Person Section.	This section displays if there is data population, otherwise, this section is hidden.
Page 13 – Info Reported	The Deceased Person Section	This section displays if there is data population, otherwise, this section is hidden.
Page 13 – Info Reported	List of the name of the persons who is incarcerated or deceased.	This section initially contains one row for incarcerated person and one row for the deceased person. If there are additional records, the row will repeat for each additional record.

3. The form has the following print options:

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

4. The form has the following mailing options:

Mailing Options	Option for MC 216
Mail-To (Recipient)	N/A – the form cannot be printed centrally.
Mailed From (Return)	N/A – the form cannot be printed centrally.
Mail-back-to Address	N/A – the form cannot be printed centrally.
Outgoing Envelope Type	N/A – the form cannot be printed centrally.
Return Envelope Type	N/A – the form cannot be printed centrally.

5. The form has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form has the following additional options:

Additional Options	Option for MC 216
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

2.4 Update the MC 210 RV Form

2.4.1 Overview

This section describes the updates to the MC 210 RV form.

State Form: MC 210 RV

Current Program: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Arabic, Armenian, Cambodian, Cantonese, Farsi, Hmong, Korean, Mandarin, Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MC Annual Redetermination Form

Template Repository Visibility: All Counties

2.4.2 Description of Change

1. Update the MC 210 RV to the 10/20 revision and turn off the threshold languages. The updated version of the MC 210 RV is not available in Template Repository **until the CalSAWS Go-Live of the C-IV counties.**

Form Number: MC 210 RV

Updated Form Title: Non-MAGI MC Renewal Form

Updated Languages: English, Spanish

Updated Imaging Form Name: Non-MAGI MC Renewal Form

Include NA Back 9: N

Form Mockups/Examples: Please refer to Supporting Documents #2

- a. Include the following parameters for the packet on the Document Parameters page:

Technical Note: The name of the document parameter is *REPacket.jsp*. This is the current document parameter used by the MC 216.

- i. Case Number
- ii. Customer Name
- iii. Program
- iv. RE Month
- v. Language

Figure 2.4.1 – Document Parameters Page

- 2. Update the population logic and add dynamic sections.
 - a. The variables are populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	RE Due Date	The field populates with the redetermination due date. Format: Month Day, Year	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	County Phone Number	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 1 – Cover Page	County TTY Number	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 1 – Cover Page	Recipient Mailing Address	This field populates with the mailing address of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository.	Y	Y	Y
Page 1 – Cover Page	Notice Date	This field populates with the date when the form was generated. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	Case Number	This field populates with the case name of the current case.	Y	Y	Y
Page 1 – Cover Page	Case Name	This field populates with the case number of the current case.	Y	Y	Y
Page 1 – Cover Page	Worker Name	This field populates with the name of the worker.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	Worker Phone Number	This field populates with phone number of the worker. Format: (###) ###-####	Y	Y	Y
Page 1 – Cover Page	Name	This field populates with the name of the person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 1 – Cover Page	Date of Birth	This field populates with the date of birth of the person. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	Portal Name	This field populates with the URL of the Self-Service Portal. If the case is managed in a migration county, this field populates with the URL of BenefitsCal (www.benefitscal.org). If case is managed in Los Angeles County, this field populates with the URL of YourBenefitsNow.	Y	Y	Y
Page 1 – Cover Page	Office Name	This field populates with the name of the office.	Y	Y	Y
Page 1 – Cover Page	Office Address	This field populates with the office address.	Y	Y	Y
Page 1 – Cover Page	Office Hours Begin	This field populates with the start time of the office hours. Format: X:XX am	Y	Y	Y
Page 1 – Cover Page	Office Hours End	This field populates with the end time of the office hours. Format: X:XX pm	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 2 – Contact Info	Name	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix Note: The same person is used to populate the address, phone number, email, language fields on page 2 below.	Y	Y	Y
Page 2 – Contact Info	Home Address	This field populates with the person's physical address.	Y	Y	Y
Page 2 – Contact Info	Mailing Address	This field populates with the person's mailing address if it is different from the home address. If it is the same as the home address or if there is no mailing address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	Home Phone Number	This field populates with the person's home phone number. If there is no home phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	Cell Phone Number	This field populates with the person's cell phone number. If there is no	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		cell phone number, this field will be blank. Format: (###) ###-####			
Page 2 – Contact Info	Other Phone Number	This field populates with the person's other phone number. It populates the phone number based on the hierarchy below: <ul style="list-style-type: none"> • Message • Work • TDD • Fax • Toll Free If no phone number is available, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	Email	This field populates with the person's email address. If there is no email address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	Written Language	This field populates with the person's written language.	Y	Y	Y
Page 2 – Contact Info	Spoken Language	This field populates with the person's spoken language.	Y	Y	Y
Page 2 – Contact Info	County Phone Number	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 2 – Contact Info	County TTY Number	The field populates with the Toll-Free number on the County Contact	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)			
Page 3 – Household Members	Primary Person Name	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	Household Person Name	This field populates with the name of household member other than the primary person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	Relationship Type	This field populates with the relationship of the household member to the primary person.	Y	Y	Y
Page 3 – Household Members	Address	This field populates with the home address of the household member.	Y	Y	Y
Page 4 - Income	Name	This field populates with the name of the person on the income record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 4 - Income	Source of Income	This field populates with the source of the income.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 4 - Income	Income Amount	This field populates with the income amount. Format: \$XX.XX	Y	Y	Y
Page 4 - Income	Frequency	This field populates the income frequency.	Y	Y	Y
Page 6 - Expenses	Name	This field populates with the name of the person on the expense record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 6 - Expenses	Type of Expense	This field populates with the type of the expense.	Y	Y	Y
Page 6 - Expenses	Amount	This field populates with the amount of the expense. Format: \$XX.XX	Y	Y	Y
Page 6 - Expenses	Frequency	This field populates with the frequency of the expense.	Y	Y	Y
Page 8 - Property	Name	This field populates with the name(s) of the owner(s) on the Property record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 8 - Property	Type of Property	This field populates with the type of the property. If the category is 'Transferred Property/Income' and type is 'Income' or 'Property', populate the field with 'Transferred Property/Income'. If the category is 'Unallowable Withdrawal', populate the field with 'Unallowable Withdrawal'.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		For the other categories, populate the field with the property type.			
Page 8 - Property	Property Detail	This field populates with the property detail. If the category is 'Liquid', populate the field with the 'Company Name'. If the category is 'Motor Vehicle', populate the field with the vehicle type, make, model and year. If the category is 'Transferred Property/Income', populate the field with program and type. If the category is 'Unallowable Withdrawal', populate the field with the description. If the category is 'Personal' or 'Real', this field is blank.	Y	Y	Y
Page 8 - Property	Amount	This field populates with the property value. If the status of the property is 'Exempt', populate the field with 'Not counted'. Format: \$XX.XX	Y	Y	Y
Page 10 – Medicare Coverage	Name	This field populates with the name on the Medicare record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 10 – Medicare Coverage	Part A Premium	This field populates with the Part A amount from the Medicare record. If	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		the payment method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX			
Page 10 – Medicare Coverage	Part B Premium	This field populates with the Part B amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX	Y	Y	Y
Page 10 – Medicare Coverage	Part C Premium	This field is blank.	N	N	Y
Page 10 – Medicare Coverage	Part D Premium	This field populates with the Part D amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX	Y	Y	Y
Page 11 – Long Term Care	Name	The field populates with the name of the person in the LTC facility. This information is retrieved from the Living Arrangement record with the type of 'Nursing Home/Long Term Care'. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 11 – Long Term Care	Facility Name	This field populates with the name of the LTC facility.	Y	Y	Y
Page 11 – Long Term Care	Facility Address	This field populates with the person's physical address.	Y	Y	Y
Page 12 – Other	Name	This field populates with the name of the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Health Insurance		beneficiary or beneficiaries on the Other Health Care record. Format: First, Middle, Last, and Suffix			
Page 12 – Other Health Insurance	Insurance Name	This field populates with the name of the insurance company. This is the health insurance company name when the health coverage type is 'All Other Health Coverage'. For the other types, this field is blank.	Y	Y	Y
Page 12 – Other Health Insurance	Type of Insurance	This field populates with the health coverage type.	Y	Y	Y
Page 12 – Other Health Insurance	Premium Amount	This field populates with the expense amount. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the expense amount displays under the Health Insurance Premium Expense section. Format: \$XX.XX	Y	Y	Y
Page 12 – Other Health Insurance	Frequency	This field populates with the frequency. When the health coverage type is 'All Other Health Coverage' and the 'Is	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the frequency displays under the Health Insurance Premium Expense section.			

b. Make the following sections dynamic:

Section	Dynamic Section	Conditions
Page 1 – Cover Page	List of persons under the 'It's time to renew benefits for:'	This section contains a repeating row that repeats for each person active program person. The section will expand to fit the list of persons.
Page 3 – Household Members	List of household members under the 'Review your household member information' section.	This section initially contains three rows. If there are more than four persons, the row will repeat for each additional person.
Page 4 - Income	List of incomes under the 'Review of income information' section.	This section initially contains three rows. If there are more than three income records, the row will repeat for each additional income record.
Page 6 - Expenses	List of expenses under the 'Review you expenses and deduction information' section.	This section initially contains two rows. If there are more than two expense records, the row will repeat for each additional expense record.
Page 8 - Property	List of properties under the 'Review your resources and property information' section.	This section initially contains three rows. If there are more than three property records, the row will repeat for each additional expense records.
Page 10 – Medicare Coverage	The Medicare Coverage section.	This section displays on the form only if there is at least one Medicare record. If there are no records, the section is hidden.
Page 10 – Medicare Coverage	List of Medicare information under 'Review your Medicare information' section.	This section initially contains two rows. If there are more than two Medicare records, the row will repeat for each additional Medicare record.
Page 11 – Long Term Care	The Long-Term Care section	This section displays on the form only if there is at least one Living Arrangement record for LTC.

Section	Dynamic Section	Conditions
Page 11 – Long Term Care	List of Long-Term Care facilities under the 'Review your long-term care information' section.	This section initially contains two rows. If there are more than two Living Arrangement records for LTC, the row will repeat for each additional record.
Page 12 – Other Health Insurance	List of Other Health Insurance information under the 'Review your health insurance information' section.	This section initially contains two rows. If there are more than two Other Health Care records, the row will repeat for each additional record.
Page 14 – Household Changes	The Medicare section.	This section displays on the form if the Medicare Coverage section is hidden, otherwise, this section is hidden.
Page 14 – Household Changes	The Long-term care section.	This section displays on the form if the Long-Term Care section is hidden, otherwise, this section is hidden.

3. The form has the following print options:

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

4. The form has the following mailing options:

Mailing Options	Option for MC 210 RV
Mail-To (Recipient)	N/A – the form cannot be printed centrally.
Mailed From (Return)	N/A – the form cannot be printed centrally.
Mail-back-to Address	N/A – the form cannot be printed centrally.
Outgoing Envelope Type	N/A – the form cannot be printed centrally.
Return Envelope Type	N/A – the form cannot be printed centrally.

5. The form has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form has the following additional options:

Additional Options	Option for MC 210 RV
Special Paper Stock	N/A

Additional Options	Option for MC 210 RV
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

2.5 Add the MC 217 Form

2.5.1 Overview

This section describes the creation of the MC 217 form and the addition of the form to Template Repository.

Program: Medi-Cal

Forms Category: Forms

Current Languages: English, Spanish

Template Repository Visibility: All Counties

2.5.2 Description of Change

1. Create the MC 217 form. The new form is not available in Template Repository **until the CalSAWS Go-Live of the C-IV counties.**

Form Header: N/A

Form Footer: CalSAWS Standard Footer (Footer 1)

Form Title: Mixed MC Renewal Form

Form Number: MC 217

Imaging Form Name: Mixed MC Renewal Form

Imaging Document Type: Customer Reporting

Include NA Back 9: No

Form Mockup/Example: Please refer to Supporting Documents #3

- a. Include the following parameters for the packet on the Document Parameters page:

Technical Note: The name of the document parameter is *REPacket.jsp*. This is the current document parameter used by the MC 216.

- i. Case Number
- ii. Customer Name
- iii. Program
- iv. RE Month
- v. Language

Figure 2.5.1 – Document Parameters Page

- 2. Update the population logic and add dynamic sections.
 - a. The variables are populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	RE Due Date	The field populates with the redetermination due date. Format: Month Day, Year	Y	Y	Y
Page 1 – Cover Page	County Phone Number	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	County TTY Number	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 1 – Cover Page	Recipient Mailing Address	This field populates with the mailing address of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository.	Y	Y	Y
Page 1 – Cover Page	Notice Date	This field populates with the date when the form was generated. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	Case Number	This field populates with the case name of the current case.	Y	Y	Y
Page 1 – Cover Page	Case Name	This field populates with the case number of the current case.	Y	Y	Y
Page 1 – Cover Page	Worker Name	This field populates with the name of the worker.	Y	Y	Y
Page 1 – Cover Page	Worker Phone Number	This field populates with phone number of the worker. Format: (###) ###-####	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	Name	This field populates with the name of the person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 1 – Cover Page	Date of Birth	This field populates with the date of birth of the person. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	Portal Name	This field populates with the URL of the Self-Service Portal. If the case is managed in a migration county, this field populates with the URL of BenefitsCal (www.benefitscal.org). If case is managed in Los Angeles County, this field populates with the URL of YourBenefitsNow.	Y	Y	Y
Page 1 – Cover Page	Office Name	This field populates with the name of the office.	Y	Y	Y
Page 1 – Cover Page	Office Address	This field populates with the office address.	Y	Y	Y
Page 1 – Cover Page	Office Hours Begin	This field populates with the start time of the office hours. Format: X:XX am	Y	Y	Y
Page 1 – Cover Page	Office Hours End	This field populates with the end time of the office hours. Format: X:XX pm	Y	Y	Y
Page 2 – Contact Info	Name	This field populates with the name of the primary applicant when generated through batch or the person selected in the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix Note: The same person is used to populate the address, phone number, email, language fields on page 2 below.			
Page 2 – Contact Info	Home Address	This field populates with the person's physical address.	Y	Y	Y
Page 2 – Contact Info	Mailing Address	This field populates with the person's mailing address if it is different from the home address. If it is the same as the home address or if there is no mailing address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	Home Phone Number	This field populates with the person's home phone number. If there is no home phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	Cell Phone Number	This field populates with the person's cell phone number. If there is no cell phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 2 – Contact Info	Other Phone Number	<p>This field populates with the person's other phone number. It populates the phone number based on the hierarchy below:</p> <ul style="list-style-type: none"> • Message • Work • TDD • Fax • Toll Free <p>If no phone number is available, this field will be blank. Format: (###) ###-####</p>	Y	Y	Y
Page 2 – Contact Info	Email	This field populates with the person's email address. If there is no email address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	Written Language	This field populates with the person's written language.	Y	Y	Y
Page 2 – Contact Info	Spoken Language	This field populates with the person's spoken language.	Y	Y	Y
Page 2 – Contact Info	County Phone Number	<p>The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX</p>	Y	Y	Y
Page 2 – Contact Info	County TTY Number	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Format: 1-XXX-XXX-XXXX (excluding 711 phone number)			
Page 3 – Household Members	Primary Person Name	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	Household Person Name	This field populates with the name of household member other than the primary person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	Relationship Type	This field populates with the relationship of the household member to the primary person.	Y	Y	Y
Page 3 – Household Members	Address	This field populates with the home address of the household member.	Y	Y	Y
Page 4 – Tax Info	Tax Filer Name	This field populates with the name of the tax filer. This information is retrieved from the Tax Household record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 4 – Tax Info	Plan to File	This field populates with 'Yes' or 'No' if the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		person is planning to file taxes. This information is retrieved from the Tax Household record.			
Page 4 – Tax Info	Expected to File	This field populates with 'Yes' or 'No' if the person is expected to file taxes. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 4 – Tax Info	Tax Filing Status	This field populates with the expected filing status of the person. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 6 - Income	Name	This field populates with the name of the person on the income record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 6 - Income	Source of Income	This field populates with the source of the income.	Y	Y	Y
Page 6 - Income	Income Amount	This field populates with the income amount. Format: \$XX.XX	Y	Y	Y
Page 6 - Income	Frequency	This field populates the income frequency.	Y	Y	Y
Page 8 - Expenses	Name	This field populates with the name of the person on the expense record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 8 - Expenses	Type of Expense	This field populates with the type of the expense.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 8 - Expenses	Amount	This field populates with the amount of the expense. Format: \$XX.XX	Y	Y	Y
Page 8 - Expenses	Frequency	This field populates with the frequency of the expense.	Y	Y	Y
Page 10 - Property	Name	This field populates with the name(s) of the owner(s) on the Property record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 10 - Property	Type of Property	This field populates with the type of the property. If the category is 'Transferred Property/Income' and type is 'Income' or 'Property', populate the field with 'Transferred Property/Income'. If the category is 'Unallowable Withdrawal', populate the field with 'Unallowable Withdrawal'. For the other categories, populate the field with the property type.	Y	Y	Y
Page 10 - Property	Property Detail	This field populates with the property detail. If the category is 'Liquid', populate the field with the 'Company Name'. If the category is 'Motor Vehicle',	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		<p>populate the field with the vehicle type, make, model and year.</p> <p>If the category is 'Transferred Property/Income', populate the field with program and type.</p> <p>If the category is 'Unallowable Withdrawal', populate the field with the description.</p> <p>If the category is 'Personal' or 'Real', this field is blank.</p>			
Page 10 - Property	Amount	<p>This field populates with the property value. If the status of the property is 'Exempt', populate the field with 'Not counted'.</p> <p>Format: \$XX.XX</p>	Y	Y	Y
Page 12 - Medicare Coverage	Name	<p>This field populates with the name on the Medicare record.</p> <p>Format: First, Middle, Last, and Suffix</p>	Y	Y	Y
Page 12 - Medicare Coverage	Part A Premium	<p>This field populates with the Part A amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'.</p> <p>Format: \$XX.XX</p>	Y	Y	Y
Page 12 - Medicare Coverage	Part B Premium	<p>This field populates with the Part B amount from the Medicare record. If the payment</p>	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX			
Page 12 – Medicare Coverage	Part C Premium	This field is blank.	N	N	Y
Page 12 – Medicare Coverage	Part D Premium	This field populates with the Part D amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: \$XX.XX	Y	Y	Y
Page 13 – Long Term Care	Name	The field populates with the name of the person in the LTC facility. This information is retrieved from the Living Arrangement record with the type of 'Nursing Home/Long Term Care'. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 13 – Long Term Care	Facility Name	This field populates with the name of the LTC facility.	Y	Y	Y
Page 13 – Long Term Care	Facility Address	This field populates with the person's physical address.	Y	Y	Y
Page 14 – Other Health Insurance	Name	This field populates with the name of the beneficiary or beneficiaries on the Other Health Care record. Format: First, Middle, Last, and Suffix	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 14 – Other Health Insurance	Insurance Name	This field populates with the name of the insurance company. This is the health insurance company name when the health coverage type is 'All Other Health Coverage'. For the other types, this field is blank.	Y	Y	Y
Page 14 – Other Health Insurance	Type of Insurance	This field populates with the health coverage type.	Y	Y	Y
Page 14 – Other Health Insurance	Premium Amount	This field populates with the expense amount. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the expense amount displays under the Health Insurance Premium Expense section. Format: \$XX.XX	Y	Y	Y
Page 14 – Other Health Insurance	Frequency	This field populates with the frequency. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the frequency displays under the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Health Insurance Premium Expense section.			
Page 16 – Info Reported	Incarcerated Name	This field populates with the name of the person who is incarcerated. This person is listed as incarcerated on the most recent DER but is not verified. Technical Note: This information can be found on the CalHEERS Verification table. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 16 – Info Reported	Deceased Name	This field populates with the name of the person who is deceased. This person is listed as deceased on the most recent DER but is not verified. Technical Note: This information can be found on the CalHEERS Verification table. Format: First, Middle, Last, and Suffix	Y	Y	Y

b. Make the following sections dynamic:

Section	Dynamic Section	Conditions
Page 1 – Cover Page	List of persons under the 'It's time to renew benefits for:' section.	This section contains a repeating row that repeats for each person active program person. The section will expand to fit the list of persons.
Page 3 – Household Members	List of household members under the 'Review your	This section initially contains three rows. If there are more than four persons, the row will repeat for each additional person.

Section	Dynamic Section	Conditions
	household member information' section.	
Page 4 – Tax Info	List of tax filers under the 'Review your tax information' section.	This section initially contains two rows. The first row always displays the primary tax filer. If there are more than one non-primary tax filer, the row will repeat for each tax filer.
Page 6 - Income	List of incomes under the 'Review of income information' section.	This section initially contains three rows. If there are more than three income records, the row will repeat for each additional income record.
Page 8 - Expenses	List of expenses under the 'Review you expenses and deduction information' section.	This section initially contains two rows. If there are more than two expense records, the row will repeat for each additional expense record.
Page 10 - Property	List of properties under the 'Review your resources and property information' section.	This section initially contains three rows. If there are more than three property records, the row will repeat for each additional expense records.
Page 12 – Medicare Coverage	The Medicare Coverage section.	This section displays on the form only if there is at least one Medicare record. If there are no records, the section is hidden.
Page 12 – Medicare Coverage	List of Medicare information under 'Review your Medicare information' section.	This section initially contains two rows. If there are more than two Medicare records, the row will repeat for each additional Medicare record.
Page 13 – Long Term Care	The Long-Term Care section	This section displays on the form only if there is at least one Living Arrangement record for LTC.
Page 13 – Long Term Care	List of Long-Term Care facilities under the 'Review your long-term care information' section.	This section initially contains two rows. If there are more than two Living Arrangement records for LTC, the row will repeat for each additional record.
Page 14 – Other Health Insurance	List of Other Health Insurance information under the 'Review your health insurance information' section.	This section initially contains two rows. If there are more than two Other Health Care records, the row will repeat for each additional record.
Page 16 – Household Changes	The Medicare section.	This section displays on the form if the Medicare Coverage section is hidden, otherwise, this section is hidden.
Page 16 – Household Changes	The Long-term care section.	This section displays on the form if the Long-Term Care section is hidden, otherwise, this section is hidden.
Page 16 – Info Reported	The Incarcerated Person Section.	This section displays if there is data population, otherwise, this section is hidden.

Section	Dynamic Section	Conditions
Page 16 – Info Reported	The Deceased Person Section	This section displays if there is data population, otherwise, this section is hidden.
Page 16 – Info Reported	List of the name of the persons who is incarcerated or deceased.	This section initially contains one row for incarcerated person and one row for the deceased person. If there are additional records, the row will repeat for each additional record.

3. The form has the following print options:

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

4. The form has the following mailing options:

Mailing Options	Option for MC 217
Mail-To (Recipient)	N/A – the form cannot be printed centrally.
Mailed From (Return)	N/A – the form cannot be printed centrally.
Mail-back-to Address	N/A – the form cannot be printed centrally.
Outgoing Envelope Type	N/A – the form cannot be printed centrally.
Return Envelope Type	N/A – the form cannot be printed centrally.

5. The form has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form has the following additional options:

Additional Options	Option for MC 217
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

2.6 Update the MC 003

2.6.1 Overview

The current version of the MC 003 in CalSAWS is the 06/07 version. Update the form to the 11/12 version.

State Form: MC 003

Current Program: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Farsi, Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Template Repository Visibility: All Counties

2.6.2 Description of Change

1. Update the MC 003 to the 11/12 version.

Note: *Apart from Spanish, the version for the threshold languages is 05/13.*

Form Number: MC 003

Form Name: Early Periodic Screening, Diagnostic, and Treatment (EPSDT)

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

Include NA Back 9: N

Form Mockups/Examples: Please refer to Supporting Documents #4

2.7 Update the PUB 13

2.7.1 Overview

The current version of the PUB 13 in CalSAWS is the 08/16 version. Update the form to the 08/20 version.

State Form: PUB 13

Current Program: Welfare to Work

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Arabic, Armenian, Cambodian, Cantonese (Chinese), Farsi, Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Template Repository Visibility: All Counties

2.7.2 Description of Change

1. Update the PUB 13 to the 08/20 version.

Form Number: PUB 13

Form Name: Your Rights Under California Welfare Programs

Updated Languages: English, Spanish

Include NA Back 9: N

Form Mockups/Examples: Please refer to Supporting Documents #5

2. Update the CF RE, CW RE, and the CW/CF RE Packets with the updated version of the PUB 13.

2.8 Update the PUB 183/PUB 184

2.8.1 Overview

The current version of the PUB 183/PUB 184 in CalSAWS is the 01/04 version. Update the PUB 183 to the 09/15 version and the PUB 184 to the 01/17 version.

State Form: PUB 183/PUB 184

Current Program: CalWORKs, CalFresh, Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Brochure/Flyer

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Farsi, Korean, Lao, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Template Repository Visibility: All Counties

2.8.2 Description of Change

1. Update the PUB 183 to the 09/15 version and update the PUB 184 to the 01/17 version.

Form Number: PUB 183

Form Name: CHDP Information

Updated Languages: English, Spanish

Include NA Back 9: N

Form Mockups/Examples: Please refer to Supporting Documents #6

2. Update the CF RE, CW RE, and the CW/CF RE Packets with the updated version of the PUB 183/PUB 184.

2.9 Update the MAGI Redetermination Packet for Los Angeles County

2.9.1 Overview

This section describes the update to the existing MAGI MC packet for Los Angeles County.

Current Program: Medi-Cal

Current Forms Category: Application

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MAGI MC Packet

Template Repository Visibility: Los Angeles County

2.9.2 Description of Change

1. Update the form name and form number of the packet. Turn off the threshold languages. The updated form title and number and languages is not visible **until the CalSAWS Go-Live date of the C-IV counties.**
 - a. **Form Title:** MAGI RE Packet
 - b. **Form Number:** MAGI RE Packet
 - c. **Updated Languages:** English, Spanish
 - d. **Updated Imaging Form Name:** MAGI RE Packet
2. Update the Document Parameters to have the following fields:
Technical Note: The name of the document parameter is REPacket.jsp.
 - a. Case Number
 - b. Customer Name
 - c. Program
 - d. RE Month
 - e. Language

Document Parameters Help

*- Indicates required fields unless generating a blank template

Generate Form Generate Blank Template Cancel

Case Number: * Go

Customer Name: *

Program: *

RE Month: *

Language: *

Generate Form Generate Blank Template Cancel

Figure 2.9.1 – Document Parameters Page

- f. The following validation message will display on the Document Parameters page to prevent the generation of the packet from Template Repository when there is a Customer Reporting record for the packet in any status except 'Not Applicable' for the same Submit Month already exists: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
3. Update the packet to use the updated version of the MC 216. The updated packet is not available until the CalSAWS Go-Live date of the C-IV counties.

Form

Coversheet
MC 216

2.10 Add the MAGI Redetermination Packet for the Migration Counties

2.10.1 Overview

This section describes the creation of the MAGI MC Packet for the Migration Counties.

Program: Medi-Cal

Forms Category: Application

Template Repository Visibility: Migration Counties

Languages: English, Spanish

2.10.2 Description of Change

1. Create the MAGI RE packet for the Migration Counties with the forms in the following order:

Form
Coversheet
MC 216
MC 019
MC 219
MC 372
PUB 13
PUB 183/PUB 184
MC 003

2. Add the MAGI RE Packet to Template Repository for the Migration Counties. The new packet is not available in Template Repository **until the CalSAWS Go-Live date of the C-IV counties.**

Form Header: N/A

Form Footer: CalSAWS Standard Footer (Footer 1)

Form Title: MAGI RE Packet

Form Number: MAGI RE Packet

Imaging Form Name: MAGI RE Packet

Imaging Document Type: Customer Reporting

Include NA Back 9: No

- a. Include the following parameters for the packet on the Document Parameters page:

Technical Note: The name of the document parameter is *REPacket.jsp*.

- i. Case Number
- ii. Customer Name
- iii. Program
- iv. RE Month
- v. Language

The screenshot shows a web form titled "Document Parameters". At the top right is a "Help" icon. Below the title is a red asterisk note: "*- Indicates required fields unless generating a blank template". To the right of this note are three buttons: "Generate Form", "Generate Blank Template", and "Cancel". The form contains five fields, each with a red asterisk indicating it is required:

- Case Number:** A text input field with a "Go" button to its right.
- Customer Name:** A dropdown menu currently showing "- Select -".
- Program:** A dropdown menu currently showing "- Select -".
- RE Month:** A text input field with a calendar icon to its right.
- Language:** A dropdown menu currently showing "English".

At the bottom of the form are three buttons: "Generate Form", "Generate Blank Template", and "Cancel".

Figure 2.10.1 – Document Parameters Page

- b. The following validation message will display on the Document Parameters page to prevent the generation of the packet from Template Repository when there is a Customer Reporting record for the packet in any status except 'Not Applicable' for the same Submit Month already exists: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
- 3. Add population logic for the packet. The population logic for the MC 216 will be used to populate the form within the packet.
 - 4. Add the Business Reply Mail (BRM) header on the second page of the Coversheet. The existing population logic will be used to populate the case information and address on the BRM header.
 - 5. The packet has the following print options:

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

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

6. The packet has the following mailing options:

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

7. The packet has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. The packet has the following additional options:

Additional Options	Option for RE Packet
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

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

Field to Populate	Population for RE Packet
Type	MAGI RE Packet Technical Note: The existing type code is MG. Update the short

Field to Populate	Population for RE Packet
	<i>decode name to match the packet name.</i>
Submit Month - when generated from Template Repository	Submit Month from Document Parameters page
Submit Month - when generated through Batch	Current Medi-Cal Program RE Due Date
Program	MC
Status	<p>Customer Reporting Tracking Status</p> <p>Customer Reporting Statuses:</p> <ul style="list-style-type: none"> • Generated • Sent • Received • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted <p>For example: The status will be set to “Sent” if the Packet is generated and sent to the recipient through Batch.</p>
Status Date	Date of the latest Status Date

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

Field to Populate	Population for RE Packet
Case Id	The case associated to the packet.
Type	Document
Short Description	MAGI RE Packet
Long Description	The following forms were included for the {redeterDate} RE: Coversheet, MC 216, MC 019, MC 219, MC 372, PUB 183/PUB 184, and MC 003. These items are due in 60 days.
Created by	Batch or User
Updated by	Batch or User

2.11 Update the Non-MAGI Redetermination Packet for Los Angeles County

2.11.1 Overview

This section describes the update to the existing MC packet for Los Angeles County.

Current Program: Medi-Cal

Current Forms Category: Application

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MC Packet

Template Repository Visibility: Los Angeles County

2.11.2 Description of Change

1. Update the form name and form number of the packet. Turn off the threshold languages. The updated form title and number and languages is not visible **until the CalSAWS Go-Live date of the C-IV counties.**
 - a. **Form Title:** Non-MAGI RE Packet
 - b. **Form Number:** Non-MAGI RE Packet
 - c. **Updated Languages:** English, Spanish
 - d. **Updated Imaging Form Name:** Non-MAGI RE Packet
2. Update the Document Parameters to have the following fields:

Technical Note: *The name of the document parameter is REPacket.jsp.*

 - a. Case Number
 - b. Customer Name
 - c. Program
 - d. RE Month
 - e. Language

Figure 2.11.1 – Document Parameters Page

- f. The following validation message will display on the Document Parameters page to prevent the generation of the packet from Template Repository when there is a Customer Reporting record for the packet in any status except 'Not Applicable' for the same Submit Month already exists: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
3. Update the packet to use the updated version of the MC 210 RV. The updated packet is not available until the CalSAWS Go-Live date of the C-IV counties.

Form
Coversheet
MC 210 RV

2.12 Add the Non-MAGI Redetermination Packet for the Migration Counties

2.12.1 Overview

This section describes the creation of the Non-MAGI RE Packet for the Migration Counties.

Program: Medi-Cal

Forms Category: Application

Template Repository Visibility: Migration Counties

Languages: English, Spanish

2.12.2 Description of Change

1. Create the Non-MAGI RE Packet for the Migration Counties with the forms in the following order:

Form
Coversheet
MC 210 RV
MC 019
MC 219
MC 372
MC 007
DHCS 7077
DHCS 7077 A
PUB 13
PUB 183/PUB 184
MC 003

2. Add the Non-MAGI RE Packet to Template Repository. The new packet is not available in Template Repository **until the CalSAWS Go-Live date of the C-IV counties.**

Form Header: N/A

Form Footer: CalSAWS Standard Footer (Footer 1)

Form Title: Non-MAGI RE Packet

Form Number: Non-MAGI RE Packet

Include NA Back 9: No

Imaging Form Name: Non-MAGI RE Packet

Imaging Document Type: Customer Reporting

- a. Include the following parameters for the packet on the Document Parameters page:

Technical Note: *The name of the document parameter is REPacket.jsp.*

- i. Case Number
- ii. Customer Name
- iii. Program
- iv. RE Month
- v. Language

Figure 2.12.1 – Document Parameters Page

- b. The following validation message will display on the Document Parameters page to prevent the generation of the packet from Template Repository when there is a Customer Reporting record for the packet in any status except 'Not Applicable' for the same Submit Month already exists: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
3. Add population logic for the packet. The population logic for the MC 210 RV will be used to populate the form within the packet.
4. Add the Business Reply Mail (BRM) header on the second page of the Coversheet. The existing population logic will be used to populate the case information and address on the BRM header.
5. The packet has the following print options:

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

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

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the Medi-Cal

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

7. The packet has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. The packet has the following additional options:

Additional Options	Option for RE Packet
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

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

Field to Populate	Population for RE Packet
Type	Non-MAGI RE Packet Technical Note: The existing type code is MR. Update the short decode name to match the packet name.
Submit Month - when generated from Template Repository	Submit Month from Document Parameters page
Submit Month - when generated through Batch	Current Medi-Cal Program RE Due Date
Program	MC
Status	Customer Reporting Tracking Status Customer Reporting Statuses: <ul style="list-style-type: none"> Generated Sent

Field to Populate	Population for RE Packet
	<ul style="list-style-type: none"> • Received • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted <p>For example: The status will be set to "Sent" if the Packet is generated and sent to the recipient through Batch.</p>
Status Date	Date of the latest Status Date

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

Field to Populate	Population for RE Packet
Case Id	The case associated to the packet.
Type	Document
Short Description	Non-MAGI RE Packet
Long Description	The following forms were included for the {redeterDate} RE: Coversheet, MC 210 RV, PUB 13, MC 372, MC 007, DHCS 7077, DHCS 7077 A, PUB 183/PUB 184 and MC 003. These items are due in 60 days.
Created by	Batch or User
Updated by	Batch or User

2.13 Update the Mixed Household Redetermination Packet for Los Angeles County

2.13.1 Overview

This section describes the update to the existing Mixed Household RE packet for Los Angeles County.

Current Program: Medi-Cal

Current Forms Category: Application

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: Mixed MC RE Packet

Template Repository Visibility: Los Angeles County

2.13.2 Description of Change

1. Update the form name and form number of the packet. Turn off the threshold languages. The updated form title and number and languages is not visible **until the CalSAWS Go-Live date of the C-IV counties.**
 - a. **Form Title:** Mixed Household RE Packet
 - b. **Form Number:** Mixed Household RE Packet
 - c. **Updated Languages:** English, Spanish
 - d. **Updated Imaging Form Name:** Mixed Household RE Packet
Technical Note: This packet currently uses the REPacket.jsp. No update is necessary for the Document Parameter page.
2. Update the packet to use the new MC 217 form. The updated packet is not available **until the CalSAWS Go-Live date of the C-IV counties.**

Form
Coversheet
MC 217

2.14 Add the Mixed Household Redetermination Packet for the Migration Counties

2.14.1 Overview

This section describes the creation of the Mixed Household RE Packet for the Migration Counties.

Program: Medi-Cal

Forms Category: Forms

Template Repository Visibility: Migration Counties

Languages: English, Spanish

2.14.2 Description of Change

1. Create the Mixed Household RE packet for the Migration Counties with the forms in the following order:

Form
Coversheet
MC 217
MC 019
MC 219
MC 372
MC 007
DHCS 7077
DHCS 7077 A
PUB 13
PUB 183/PUB 184
MC 003

2. Add the Mixed Household RE Packet to Template Repository for the 57 Migration Counties. The new packet is not available in Template Repository **until the CalSAWS Go-Live date of the C-IV counties.**

Form Header: N/A

Form Footer: CalSAWS Standard Footer (Footer 1)

Form Title: Mixed Household RE Packet

Form Number: Mixed Household RE Packet

Include NA Back 9: No

Imaging Form Name: Mixed Household RE Packet

Imaging Document Type: Customer Reporting

- a. Include the following parameters for the packet on the Document Parameters page:

Technical Note: *The name of the document parameter is REPacket.jsp.*

- i. Case Number
- ii. Customer Name
- iii. Program
- iv. RE Month
- v. Language

Figure 2.14.1 – Document Parameters Page

- b. The following validation message will display on the Document Parameters page to prevent the generation of the packet from Template Repository when there is a Customer Reporting record for the packet in any status except 'Not Applicable' for the same Submit Month already exists: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
3. Add population logic for the packet. The population logic for the MC 217 will be used to populate the form within the packet.
4. Add the Business Reply Mail (BRM) header on the second page of the Coversheet. The existing population logic will be used to populate the case information and address on the BRM header.
5. The packet has the following print options:

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

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

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the Medi-Cal

Mailing Options	Option for RE Packet
	Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Medi-Cal Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	6"x10" Flat Mail Envelope
Return Envelope Type	BRM

7. The packet has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. The packet has the following additional options:

Additional Options	Option for RE Packet
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

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

Field to Populate	Population for RE Packet
Type	Mixed Household RE Packet Technical Note: The existing type code is MI. Update the short decode name to match the packet name.
Submit Month - when generated from Template Repository	Submit Month from Document Parameters page
Submit Month - when generated through Batch	Current Medi-Cal Program RE Due Date
Program	MC
Status	Customer Reporting Tracking Status Customer Reporting Statuses: <ul style="list-style-type: none"> Generated Sent Received

	<ul style="list-style-type: none"> • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted <p>For example: The status will be set to “Sent” if the Packet is generated and sent to the recipient through Batch.</p>
Status Date	Date of the latest Status Date

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

Field to Populate	Population for RE Packet
Case Id	The case associated to the packet.
Type	Document
Short Description	Mixed Household RE Packet
Long Description	The following forms were included for the {redeterDate} RE: Coversheet, MC 217, MC 019, MC 219, PUB 13, MC 372, MC 007, DHCS 7077, DHCS 7077 A, PUB 183/PUB 184 and MC 003. These items are due in 60 days.
Created by	Batch or User
Updated by	Batch or User

2.15 Update to Aid Code Category

2.15.1 Overview

The Packet Type column in the Aid Code category (CT 184) defines which packet is sent out for a certain aid code. The column is currently populated with the following values: MR1 (Medi-Cal Redetermination Packet), MR3 (Medi-Cal Redetermination Packet – LTC), MR4 (Medi-Cal Redetermination Packet – MSP0), and MR9 (Medi-Cal Pre ACA Redetermination Packet). Since these packets will be replaced with the Non-MAGI RE packet, update the values in the column with a common value.

2.15.2 Description of Change

1. Update the values in the Packet Type column with 'Non-MAGI Packet'. Please refer to **Section 3.0 Supporting Documents #8** for the list of aid codes.

Technical Note: *The codes table change request to update the values in the Packet Type column should not **run until the CalSAWS Go-Live date of the C-IV counties.***

2.16 Update to Existing MC RE Packet Batch Jobs for Los Angeles County

2.16.1 Overview

The existing MC RE Packet batch jobs for Los Angeles find cases that have an RE due in two months and are sent either a MAGI, Non-MAGI or Mixed Household RE packet. The existing MC RE Packet Catch Up batch jobs run the month after the initial packets are sent out to find cases that were not sent an RE packet and sends one out. These jobs have references to the packet that are being removed. Update the driving queries of the existing MAGI, Non-MAGI, and Mixed Household RE packet batch jobs to remove the references of the packets mentioned in Section 2.1 and to use the new values defined in Section 2.15.

2.16.2 Description of Change

1. Update the driving query for the following batch jobs to remove references to the packets that are being removed. Updates to the driving query is not effective **until the CalSAWS Go-Live date of the C-IV counties.**
 - a. PB00525 (MAGI RE Packet)
 - b. PB19523 (MAGI RE Packet – Catch up)
 - c. PB00R526 (Mixed Household RE Packet)
 - d. PB19R521 (Mixed Household RE Packet – Catch up)
 - e. PB19R530 (Non-MAGI RE Packet)
 - f. PB19R526 (Non-MAGI RE Packet – Catch up)
2. Update the driving query for the following batch jobs to use the new value in the Aid Code category (CT 184). Updates to the driving query is not effective **until the CalSAWS Go-Live date of the C-IV counties.**
 - a. PB00R526 (Mixed Household RE Packet)
 - b. PB19R521 (Mixed Household RE Packet – Catch up)
 - c. PB19R530 (Non-MAGI RE Packet)
 - d. PB19R526 (Non-MAGI RE Packet – Catch up)

3. Update the driving query for the following batch jobs to remove the condition for a 'Delinquent Medical RE' case flag. This case flag is no longer available and cannot be added to a case, therefore the condition in the query is being removed. Update driving query to add a condition for an 'SSI Only' OPA record. Updates to the driving query is not effective **until the CalSAWS Go-Live date of the C-IV counties.**
 - a. PB19R530 (Non-MAGI RE Packet)
 - b. PB19R526 (Non-MAGI RE Packet – Catch up)
4. Remove the PB00R530 (MC Redeter Forms Filter batch job) as a successor for the PB19R530 batch job.

2.17 Create the MAGI RE Packet Batch Job for the Migration Counties

2.17.1 Overview

Create a new batch job to send out the MAGI RE Packet for the Migration Counties.

2.17.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month referenced below is two months following the batch date.
 - a. The current program is Medi-Cal.
 - b. The current program is Active.
 - c. The current program's RE due month is the same month as the effective month and the completion date is not set.
 - d. The most current accepted and saved regular EDBC for the current MC program has a passing MAGI budget where there is at least one person receiving a MAGI aid code.
 - e. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code for the MAGI RE Packet or Mixed Household RE packet and is for the same effective month for the current program.
 - f. There does not exist a MAGI RE or Mixed Household RE packet generated for the same effective month and the Customer Reporting record is not in status of 'Not Applicable' for the current program.

Technical Note: *The driving query for this batch job is the same as the driving query in the existing MAGI RE Packet batch job in CalSAWS.*

The C-IV driving query will check to see if there is a successful EDR/DER that was sent or received to determine if a packet will

be sent. The CalSAWS driving query will send a packet regardless of the EDR/DER.

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

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

2.17.3 Execution Frequency

This batch job runs monthly.

2.17.4 Key Scheduling Dependencies

The PB00CH103 batch job and Mixed Household RE packet batch job for the Migration Counties runs before this job.

The PB00R200 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R2XX form generation thread jobs will run after the balancer and is responsible for generating the packets.

This batch job is not scheduled to run **until the CalSAWS Go-Live date of the C-IV counties.**

2.17.5 Counties Impacted

Migration Counties

2.17.6 Data Volume/Performance

The estimated number of record this batch processes is 50,000 per month.

2.17.7 Failure Procedure/Operational Instructions

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

2.18 Create the Non-MAGI RE Packet Batch Job for the Migration Counties

2.18.1 Overview

Create a new batch job to send out the Non-MAGI RE Packet for the Migration Counties.

2.18.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month referenced below is two months following the batch date.
 - a. The program is Medi-Cal.
 - b. The program is Active.
 - c. The program RE due month is the same month as the effective month and the completion date is not set.
 - d. There does not exist an 'Other Program Assistance' (OPA) record for 'SSI/SSP', 'SSI Only', 'Adoption Assistance Program', or 'Foster Care' for the effective month.
 - e. There does not exist a person with Requested Medi-Cal Type of 'Minor Consent (12-21) FP/STD/D&A', 'Minor Consent (<21) Pregnancy', 'Minor Consent (12-21) FP/MntlHlth', or 'Minor Consent (<12) FP/STD'.
 - f. The most current accepted and saved regular EDBC for the current MC program has a passing MC budget where there is at least one person receiving a primary MC aid code and the packet type for the aid code is 'Non-MAGI'.
 - g. The most current accepted and saved regular EDBC for the current MC program does not have a passing MAGI budget.
 - h. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code for the Non-MAGI RE packet for the same effective month for the current program.
 - i. There does not exist a Non-MAGI RE packet generated for the same effective month and the Customer Reporting record is not in status of 'Not Applicable' for the current program.

Technical Note: *The driving query for this batch job is the same as the driving query in the existing Non-MAGI RE Packet batch job in CalSAWS.*
2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

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

2.18.3 Execution Frequency

This batch job runs monthly.

2.18.4 Key Scheduling Dependencies

The PB00R200 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R2XX form generation thread jobs will run after the balancer and is responsible for generating the packets.

This batch job is not scheduled to run **until the CalSAWS Go-Live date of the C-IV counties.**

2.18.5 Counties Impacted

Migration Counties

2.18.6 Data Volume/Performance

The estimated number of record this batch processes is 18,000 per month.

2.18.7 Failure Procedure/Operational Instructions

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

2.19 Create the Mixed Household RE Packet Batch Job for the Migration Counties

2.19.1 Overview

Create a new batch job to send out the Mixed Household RE Packet for the Migration Counties.

2.19.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month referenced below is two months following the batch date.
 - a. The program is Medi-Cal.
 - b. The program is Active.
 - c. The program RE due month is the same month as the effective month and the completion date is not set.
 - d. The most current accepted and saved regular EDBC for the current MC program has a passing MC budget where there is at least one person receiving a primary MC aid code and the packet type for the aid code is 'Non-MAGI' and there is a passing MAGI budget.
 - e. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code for the Mixed Household RE packet for the same effective month for the current program.
 - f. There does not exist a Mixed Household RE packet generated for the same effective month and the Customer Reporting record is not in status of 'Not Applicable' or for the current program.

Technical Note: The driving query for this batch job is the same as the driving query in the existing Mixed Household RE Packet batch job in CalSAWS.

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

Field to Populate	Population for RE Packet
Case Id	The case Id associated to the current MC program.
Program Id	The program Id of the current MC program.
Person Id	The primary applicant of the current MC program.
Type Code	FR

Field to Populate	Population for RE Packet
Sub Type Code	TDB
Effective Date	The begin date of the current RE Due Month of the MC program.

2.19.3 Execution Frequency

This batch job runs monthly.

2.19.4 Key Scheduling Dependencies

The PB00R200 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R2XX form generation thread jobs will run after the balancer and is responsible for generating the packets.

This batch job is not scheduled to run **until the CalSAWS Go-Live date of the C-IV counties.**

2.19.5 Counties Impacted

Migration Counties.

2.19.6 Data Volume/Performance

The estimated number of record this batch processes is 2,200 per month.

2.19.7 Failure Procedure/Operational Instructions

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

2.20 Update the MAGI Discontinuance for EDR Batch Job

2.20.1 Overview

The MAGI Discontinuance for EDR (PB00CH204) batch job finds cases where there is a Medi-Cal program that have not returned a MAGI RE packet or Mixed Household RE packet and sends a Negative Action Eligibility Determination Request (EDR) for 'Failed to Complete Redetermination.' The current logic only looks for the MAGI RE packet and Mixed Household RE packet for Los Angeles County. Update the batch job to include the MAGI RE packet and Mixed Household RE for the Migration Counties.

2.20.2 Description of Change

1. Update the batch logic to look for the MAGI RE packet and Mixed Household RE packet for both Los Angeles County and Migration Counties.

2.21 Update Reprint Functionality for Packets

2.21.1 Overview

Currently, previously generated MC RE packets can be reprinted centrally or locally. The MC RE packets that will be turned off should not be allowed to be reprinted. Update the reprint functionality to prevent the MC RE packets that were turned off from being reprinted.

2.21.2 Description of Change

1. Update the reprint functionality to not allow the following packets to be reprinted locally or centrally if the current system date is after the CalSAWS Go-Live date of the C-IV counties **and** it is one of the following packets:
 - a. MC LTC Packet
 - b. MSP Packet
 - c. MC 604 IPS Packet
 - d. MC Redetermination Packet
 - e. Pre-ACA MC RE Packet

Technical Note: The reprint buttons on the Document Detail page are controlled by the print button visibility indicator for a form. Update the logic in the Generated Document Controller to set the print button visibility indicator of the packet to 'AN' (None) if the current system date is after the CalSAWS Go-Live date of the C-IV counties and the packet is turned off. This will hide the reprint buttons on the page.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	MC 216 Mockup	MC216_EN.pdf MC216_SP.pdf
2	Client Correspondence	MC 210 RV Mockup	MC210RV_EN.pdf MC210RV_SP.pdf
3	Client Correspondence	MC 217 Mockup	MC217_EN.pdf MC217_SP.pdf
4	Client Correspondence	MC 003 Mockup	MC003_EN.pdf MC003_SP.pdf
5	Client Correspondence	PUB 13 Mockup	PUB13_EN.pdf PUB13_SP.pdf
6	Client Correspondence	PUB 183/PUB 184 Mockup	PUB183.pdf PUB184.pdf
7	Client Correspondence	Migration Counties RE Packet Coversheet Mockup	COVERSHEET_EN.pdf COVERSHEET_SP.pdf
8	Client Correspondence	Aid Code Packet Types Update	CA-216432 Aid Code Packet Type.xlsx
9	Client Correspondence	Type Code Translation	CA-216432 Translations.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>The updated and new MC renewal forms are implemented in CalSAWS. The MAGI, Non-MAGI, and Mixed Household RE packets are created for the migration counties and the existing packet for Los Angeles County were updated with the new forms. New batch process were also implemented to send out the packets for the migration counties.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217946 | CIV-107597

SB 80 - Changes to Vehicle Limits

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/03/2020	1.0	Initial Draft	T. Lazio
03/31/2021	1.1	Added Correspondence Regression Testing Recommendation	T. Huckaby
04/05/2021	1.2	Updated Recommendations to only reflect Vehicle Increase per ACL 21-38	T. Lazio
04/06/2021	1.3	Updated Recommendations for Correspondence to only reflect Vehicle Increase	T. Huckaby
5/13/2021	1.4	Updated to remove Recommendation 2.2 as it is no longer required	T. Huckaby

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1 OVERVIEW

This document identifies required changes to CalSAWS and C-IV related to the vehicle limits for the CalWORKs (CW) and Refugee Cash Assistance (RCA) programs for Federal Fiscal Year (FFY) 2021 effective July 1, 2021 as informed by the All County Letter (ACL) 21-38.

1.1 Current Design

The vehicle limits for CW/RCA were last updated for FFY 2020 in SCR CA-209360_CIV-104559 with the following values:

- The vehicle equity disregard increased to \$25,000 (CT 335-AN CW Motor Vehicle Disregard for C-IV and CT 335-AO CW Motor Vehicle Disregard for CalSAWS).

1.2 Requests

Per ACL 21-38 effective July 1, 2021, the resource threshold will increase by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2021) to the following value:

- The vehicle equity disregard will be increased from \$25,000 to \$25,483.

1.3 Overview of Recommendations

1. Update CW/RCA EDBC rules that apply vehicle property limit amounts for Motor Vehicle Disregard to perform calculations based on the new limit.
2. Regression test impacted NOAs and Forms that populate the CalWORKs Motor Vehicle Disregard.

1.4 Assumptions

1. Vehicle property limits will reflect the new values on impacted NOAs and Forms.

2 RECOMMENDATIONS

2.1 CW/RCA EDBC: Motor Vehicle Disregard

2.1.1 Overview

Update CW/RCA EDBC rules that apply vehicle property limit amounts for Motor Vehicle Disregard to perform calculations based on the new limit effective July 1, 2021.

2.1.2 Description of Changes

1. Effective July 1, 2021, the disregard will be increased from \$25,000 to \$25,483 (CT 335-AN CW Motor Vehicle Disregard for C-IV and CT 335-AO CW Motor Vehicle Disregard for CalSAWS). Any amount in excess of the disregard will be counted against the AU's property limit.

2.1.3 Programs Impacted

CW
RCA

2.2 C-IV Only: Regression Test Impacted CalWORKs NOA Variable Population

2.2.1 Overview

CW NOAs populate with the motor vehicle disregard for the program in C-IV.

2.2.2 Description of Changes

The following NOA Fragment in C-IV populates the vehicle disregard for CalWORKs. This Fragment needs to be regression tested to confirm that it populates with the newest motor vehicle disregard value.

C-IV NOA Fragment:

ID	Fragment Name	Fragment Text	Languages
167	MSG_PROPERTY_FAILURE	<p>The exclusion limit for nonexempt motor vehicles is <LIMIT>. The fair market value of each vehicle over the limit is countable property. Your countable total is figured on this page.</p> <p>When you do not agree with the value the County put on your car or other property, the County will accept evidence (facts) that the value is lower. If you can prove a lower value, you may still get benefits. Ask the County how.</p>	EN, AE, AR, CA, CH, FA, HM, KO, LA, RU, SP, TG, VI

2.3 Regression Test Impacted CalWORKs Form Variable Population

2.3.1 Overview

CalSAWS and C-IV have Forms that auto-populate the motor vehicle disregard for CalWORKs.

Impacted Forms:

- CW 2218
- SAWS 2A SAR

2.3.2 Description of Change

Regression test the following Forms to verify that the correct motor vehicle disregard is populating for CalWORKs.

Note: The motor vehicle disregard variable is referenced below as LIMIT_VD.

Form	Variable	Languages
CW 2218	<p>Located on Page 5 (C-IV) and Page 6 (CalSAWS):</p> <p>“There is a \$<LIMIT> limit on the value of the property (e.g. bank accounts, stocks, etc.) that the child can own and be eligible to receive CalWORKs benefits. That limit increases to \$<LIMIT2> if the child has a disability. A child under age 18 can own a vehicle (for example a car, truck, van, motorcycle, etc.) to drive to work, school, job training or to look for work. This also applies during temporary periods of unemployment for the child who customarily drives to and from work. Any motor vehicle with an equity value of \$<LIMIT_VD> or less will not count against the \$<LIMIT>. For each motor vehicle with an equity value of more than \$<LIMIT_VD>, the value that exceeds \$<LIMIT_VD> counts against the child’s property. If it was given to the child as a gift, a donation, or a family member transferred it to the child, we also do not count it. You will be asked to give the county proof from the Department of Motor Vehicles that it was a</p>	<p>CalSAWS: AE, CA, CH, EN, KO, RU, SP, VI</p> <p>C-IV: EN, SP</p>

	gift, donation or transfer from a family member.”	
SAWS 2A SAR	<p>Located on Page 9:</p> <p>“There is a \$<LIMIT> limit on the value of the property (e.g. bank accounts, stocks, etc.) that your family can own and be eligible to receive CalWORKs benefits. If someone in your family is at least 60 years of age or disabled the limit is \$<LIMIT2>. Your residence and furniture are not part of the limit. You can own a vehicle (for example a car, truck, van, motorcycle, etc.) as long as what it’s worth minus what you owe is less than \$<LIMIT_VD>. If it was given to you as a gift, a donation, or a family member transferred it to you, we do not count it. You will be asked to give the County proof from the Department of Motor Vehicles that it was a gift, donation or transfer from a family member. The vehicle will not count if used by your family for certain special reasons. Ask your worker what those reasons are. Your worker can explain to you how to figure the value of any vehicle.”</p>	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.1.2	The LRS shall include an automated method for implementing mass updates triggered by policy changes or mass participant financial changes, including Social Security or Veterans benefits cost of living adjustments (COLAs).	The maximum allowed non-exempt vehicle equity value is increased to \$25,483.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219391 | DDID 2629

Migrate CSF 142 IVR Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/04/2021	1.0	Original	Nithya Chereddy
02/08/2021	1.1	Added Spanish translation for updated IVR call flow	Nithya Chereddy
03/18/2021	1.2	Content Revision 1 updates	Nithya Chereddy

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1 OVERVIEW

The purpose of this change is to migrate the Interactive Voice Recognition (IVR) functionality for the CSF 142 form.

1.1 Current Design

CSF 142 is the Verification of Benefits form which was formerly the GEN 2000 - Passport to Services form. The existing functionality in the C-IV system allows the participant to request the CSF 142 form through IVR.

1.2 Requests

Migrate the IVR functionality for CSF 142 form to CalSAWS.

1.3 Overview of Recommendations

1. Add a CalSAWS IVR Client endpoint.
2. Update the IVR call flow to update the GEN 2000 - Passport to Services to CSF 142 - Verification of Benefits.
3. Implement the Business logic to generate the GEN 2000 form from CalSAWS System.

1.4 Assumptions

1. CSF 142 form will not be posted to the Self-Service Portal with this SCR.
2. SCR CA-215092 migrated CSF 142 form to CalSAWS.
3. The IVR functionality that is currently migrated with this SCR will only be available to C-IV migration counties. Los Angeles County and the CalWIN Migration Counties will inherit this functionality when they transition to the new CalSAWS IVR solution.
4. If there are multiple programs on a case and the programs have different workers, then the logic (migrated through this SCR) will pick a random worker from the list of active workers associated to programs where the participant is the primary applicant. This is the functionality in C-IV currently.

2 RECOMMENDATIONS

2.1 CalSAWS IVR Client endpoint

2.1.1 Overview

The following IVR Client endpoint will be added to the CalSAWS to support the generation of the CSF 142 form.

2.1.2 Description of Change

1. Add a new IVR Client endpoint to generate the CSF 142 form when requested from the IVR call flow.

Request Parameters:

CalSAWS Field Name	Type	Comments	Required
personId	Long	Person's unique ID	Y
caseId	Long	Case unique ID	Y
formType	String	CSF 142	Y
begDate	String	Form begin date Format: MM/DD/YYYY	Y
endDate	String	Form end date Format: MM/DD/YYYY	Y

2.1.3 Counties Impacted

39 C-IV Migration Counties.

2.2 Update the IVR Call Flow

2.2.1 Overview

Existing IVR call flow has the form name for CSF 142 as 'Passport to Services'. See Figure 2.2.1 Existing IVR Call Flow for old form name.

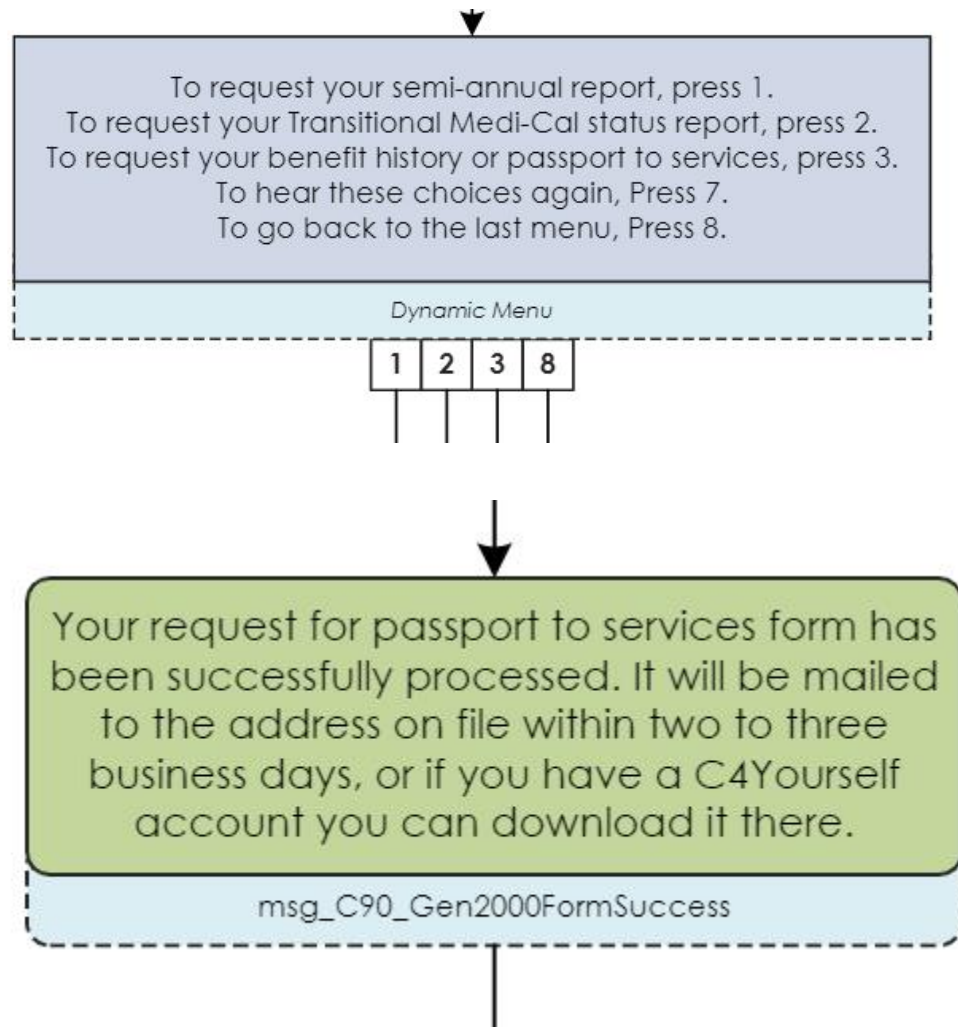


Figure 2.2.1 Existing IVR Call Flow for old form name

2.2.2 Description of Change

1. Update the existing IVR call flow to change the CSF 142 form name to 'Verification of Benefits'. See Figure 2.2.2 Updated IVR Call Flow.

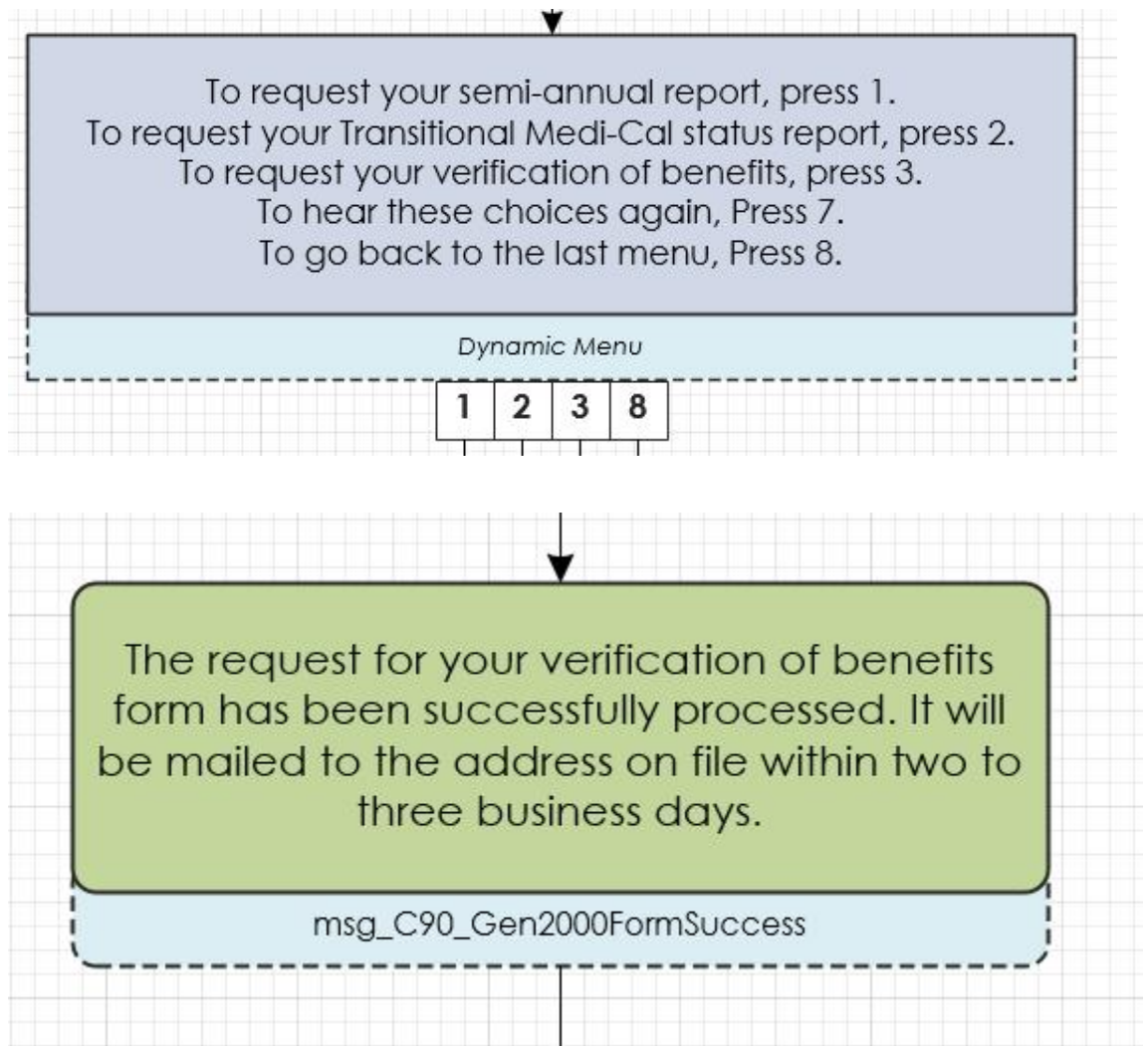


Figure 2.2.2 Updated IVR Call Flow

2.3 Generate CSF 142 form when requested through IVR

2.3.1 Overview

The functionality of generating the CSF 142 form through IVR currently does not exist in the CalSAWS.

2.3.2 Description of Change

1. Add business logic to generate CSF 142 form when requested through IVR. Business logic will perform the following actions if the person requesting the form has a valid Mailing Address.
 - a. Generate the form in person's written language. CSF 142 form will generate in English if the CSF 142 form is not available in the person's written language.

- b. Generate the CSF 142 form with Printed Centrally option.

Technical Flow: IVR Client endpoint will get called when the customer requests Verification of Benefits form. This will put a message in queue (Active MQ) and a listener inside CalSAWS application will process the message. Business logic should be added which will generate the CSF 142 form.

- 2. Create the 'Generated Document Failed: Review' task for the worker if the CSF 142 form could not be generated through IVR.

Note: The task will be created to the worker based on the below mentioned program hierarchy. i.e., a task will be created for the CW program worker if there is a CW program on the case, if the CW program does not exist, the logic will look for the MC program to find the worker associated to the MC program and so on. Program hierarchy is listed below.

- a. CW
- b. MC
- c. FS
- d. WT
- e. Other programs

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	IVR	Spanish translation for the updated IVR Call Flow	Spanish translation for IVR Call Flow.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2629	The CONTRACTOR shall migrate the GEN 2000 – Passport to Services to the CalSAWS Software with the following updates:	1. Estimate is for migrating the form in English and Spanish along with adding IVR trigger to post this form to self-service portal real time.	1. IVR functionality is being migrated to CalSAWS system with this SCR.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>1) Add the CalSAWS standard header information</p> <p>2) Update the title from "Passport to Services" to "Verification of Benefits"</p> <p>3) Remove the "Monthly Gross Inc" column</p> <p>4) Update "CW Grant" to "CalWORKs"</p> <p>5) Update "General Assistance" to "GA/GR"</p> <p>6) Update "CF Allotment" to "CalFresh"</p> <p>7) Add a new Column labeled "RCA"</p> <p>8) Add "Current" before "Household details"</p> <p>9) Update "CF" to "CalFresh"</p> <p>10) Update "MC" to "Medi-Cal"</p> <p>11) Update the form number from "GEN 2000" to CalSAWS standard naming/numbering format</p> <p>The CONTRACTOR shall migrate the C-IV functionality to request the GEN 2000 via the IVR system to the CalSAWS Software.</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>5. Existing Document Parameter page from C-IV will be migrated which allows the user to pick the benefit month begin date and end date.</p> <p>6. New IVR System will be in place and behave similar to the existing C-IV IVR System in order to add the ability for the customer to request this form from IVR.</p> <p>7. New Self-Service Portal will be in place prior to implementation in order to post this form to the customer's account.</p>	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220106

Add Business Reply Mail to CW 2200

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
21/12/2020	1.0	Initial Draft	Nithya Chereddy
01/08/2021	1.1	Updated based on reviews from BAs and Build	Nithya Chereddy
01/26/2021	1.2	Updated the design document based on comments from the Committee	Nithya Chereddy
03/16/2021	1.3	Content Revision 1 updates	Nithya Chereddy
05/05/2021	1.4	Content Revision 2 updates	Nithya Chereddy

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	2.3.2 Description of change	Error! Bookmark not defined.
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1 OVERVIEW

The CW 2200 is a 'Request for Verification' form. This form does not currently include a return envelope or Business Reply Mail (BRM).

1.1 Current Design

With SCR CA-207451, CalSAWS implemented the updated CW 2200 form in English and the below listed threshold languages without a BRM:

Spanish, Armenian, Arabic, Chinese, Farsi, Tagalog, Hmong, Korean, Russian, Vietnamese.

1.2 Requests

1. Add the CW 2200 form in Cambodian and Lao with the BRM header.
2. Add BRM to the existing English and threshold language CW 2200 form.
3. Route the CW 2200 back to the respective Centralized or District offices.

1.3 Overview of Recommendations

1. Add the CW 2200 form in Cambodian and Lao with the BRM header.
2. Add BRM to the existing English and threshold language CW 2200 form.
3. Route the CW 2200 back to the respective Centralized or District offices.

1.4 Assumptions

1. The version of the CW 2200 is not being updated.
2. 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.
3. Mock office data will be used for testing C-IV BRM addresses.
4. The bundling job is only available for LA County. The bundling jobs for the Migration Counties will be migrated with **SCR CA-207312**, therefore testing of the bundles for migration counties is not possible at this time.
5. Currently CW 2200 does not include a return envelope. This SCR adds a BRM header and BRM envelope to CW 2200 form. After this SCR goes live, workers are only supposed to reprint the CW 2200 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 CW 2200 form that is generated after this SCR goes live.

Scenario 1: Form will error out if the form is generated on 05/20/2021, SCR goes live on 05/24/2021 and the worker is trying to reprint the form centrally on 06/11/2020.

Scenario 2: Form will not error out if the form is generated on 06/01/2021, and the worker is trying to reprint the form locally/centrally on 06/06/2021.

6. The same routing logic listed in this SCR will apply for both DCFS and DPSS programs.
7. 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.
8. 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

9. 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.
10. 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.

2 RECOMMENDATIONS

2.1 Add BRM to the CW 2200 and the missing threshold languages

2.1.1 Overview

The CW 2200 is the 'Request for Verifications' form. It does not include a BRM envelope currently.

State Form: CW 2200 (06/19)

Current Programs: General Assistance/General Relief, CalWORKs, CAPI, CalFresh, Medi-Cal, RCA, Cal-Learn, GROW

Current Attached Form(s): N/A

Current Forms Category: Forms

Include NA Back 9: No

Existing Languages:

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

2.1.2 Description of Change

Update the existing CW 2200 form to add BRM coversheet and add the CW 2200 form in Cambodian and Lao threshold languages.

1. Add the language '**On the back of this sheet is the address for returning your form.**' on the first page of the coversheet. This sentence will be populated in threshold languages for the respective threshold language form.
2. Add the BRM header on the 2nd page of the coversheet (also be referred as back of the coversheet).
3. Add the language '**Please fold and ensure the County address information displays in the envelope window**' on the 2nd page of the coversheet following the BRM header. This sentence will be populated in threshold languages for the respective threshold language form.

See Supporting Document #4 for the translations of the 2 sentences mentioned above.

Updated Programs: General Assistance/General Relief, CalWORKs, CAPI, CalFresh, Medi-Cal, RCA, GROW

Updated Languages:

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

Added Languages:

Cambodian, Lao

Form Mockups/Examples: See Supporting Document #1

2.2 Route the CW 2200 form to Centralized Location/District Office Address

2.2.1 Overview

Currently the CW 2200 form does not include BRM. A BRM is being added to the CW 2200 form with this effort.

2.2.2 Description of change

1. Add the Expo Park Centralized location information to the CalSAWS system (CT 1622) and route the CW 2200 form 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

Technical Details:

Permit Number (CT 1622 REFER_TABLE_1_DESCR): 50762 LOS ANGELES CA

- Permit Number Format
 - If permit number (refer_table_1_descr from CT 1622) is 50762 LOS ANGELES CA, the permit number format will be 50762(3 Spaces)LOS ANGELES CA
- Format: 50762 LOS ANGELES CA

Following are the details used to encode the BRM Barcode for Expo Park centralized location.

Barcode ID: 00

Special Services: 708

Mailer ID: 901104952

Serial Number: 0000007

Delivery Point ZIP Code: 900379920

Following is the Encoded Barcode value for Expo Park Centralized BRM address (CT 1622 REFER_TABLE_11_DESCR)

TAFTADFFAATFAATDFDFTAFTDFATDFFTFADDATATAFATTAFTDITADATDA
AATTATT

2. Add the San Gabriel/El Monte Centralized location information to the CalSAWS system (CT 1622) and route the CW 2200 form 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

Technical Details:

Permit Number (CT 1622 REFER_TABLE_1_DESCR): 50762 LOS ANGELES CA

- Permit Number Format
 - If permit number (refer_table_1_descr from CT 1622) is 50762 LOS ANGELES CA, the permit number format will be 50762(3 Spaces)LOS ANGELES CA
- Format: 50762 LOS ANGELES CA

Following are the details used to encode the BRM Barcode for San Gabriel/El Monte centralized location.

Barcode ID: 00

Special Services: 708

Mailer ID: 901104952

Serial Number: 000000

Delivery Point ZIP Code: 917319935

Following is the Encoded Barcode value for San Gabriel/El Monte Centralized BRM address (CT 1622 REFER_TABLE_11_DESCR)

TDAADADDADADATDFTTAAFFFDADDAAATTADTTFFTFDFDFATDFFAAFAF
DFAATFAAF

3. Add the La Cienega Centralized location information to the CalSAWS system (CT 1622) and route the CW 2200 form 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
11.	Medi-Cal Mail-In Branch	89

Technical Details:

Permit Number (CT 1622 REFER_TABLE_1_DESCR): 50762 LOS ANGELES CA

- Permit Number Format
 - If permit number (refer_table_1_descr from CT 1622) is 50762 LOS ANGELES CA, the permit number format will be 50762(3 Spaces)LOS ANGELES CA
 - Format: 50762 LOS ANGELES CA

Following are the details used to encode the BRM Barcode for La Cienega centralized location.

Barcode ID: 00

Special Services: 708

Mailer ID: 901104952

Serial Number: 000000

Delivery Point ZIP Code: 903019958

Following is the Encoded Barcode value for La Cienega Centralized BRM address (CT 1622 REFER_TABLE_11_DESCR)

DDAFATAFDTFADTATFFFTADDAFAAFTDDFTDTAADDDDTDFDFATTFATAA AFTATDFFAD
--

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.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	Updated mockup of form CW 2200 - English	CW2200_EN.PDF
2	Client Correspondence	Updated mockup of form CW 2200 - Cambodian	CW2200_CA.PDF
3	Client Correspondence	Updated mockup of form CW 2200 - Lao	CW2200_LA.PDF
4	Client Correspondence	Translation of the 2 new sentences	Translations.PDF

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1206 2.18.1.2	The LRS shall generate written material, including notices, NOAs, forms, flyers, letters, and stuffers, to applicants,	This SCR involves the update and generation of a form in English as well as each system's

	participants, caregivers, sponsors, authorized representatives, and/or any other entities, in English, all threshold languages, and any other language for which the State has provided a translation.	respective threshold languages.
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