CalSAWS

California Statewide Automated Welfare System

Design Document

CA-206711

CF COLA NOA Changes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry
	Reviewed By	Priya Sridharan, Raj Devidi, Himanshu Jain, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/15/21	1.0	Initial Creation	Connor Gorry

Table of Contents

1 Overview 4

1.1 Current Design 4

1.2 Requests 4

1.3 Overview of Recommendations 4

1.4 Assumptions 4

2 Recommendations 5

2.1 Update CalFresh Shelter Change NOA 5

2.1.1 Overview 5

2.1.2 Updates to Fragment Generation 5

2.2 Update CalFresh COLA Change Reason Verbiage 5

2.2.1 Overview 5

2.2.2 Update Fragment XDP 6

2.3 Update CalFresh COLA Change NOA to not generate when Income Increases 7

2.3.1 Overview 7

2.3.2 Updates to Fragment Generation 7

2.4 Update CalFresh COLA Change NOA to not generate when Household Size has changed 7

2.4.1 Overview 7

2.4.2 Updates to Fragment Generation 8

2.5 Update CalFresh Countable Income Decrease Reason 8

2.5.1 Overview 8

2.5.2 Updates to Fragment Generation 9

2.6 Update CalFresh Message 2 Fragment Verbiage 9

2.6.1 Overview 9

2.6.2 Updates to Fragment XDP 9

3 Supporting Documents 11

4 Requirements 11

4.1 Project Requirements 11

5 Appendix 12

5.1 NOA Generation and Suppression Scenarios 12

1 OVERVIEW

1.1 Current Design

Per existing CalSAWS NOA logic, changes unrelated to the Cost-of-Living Adjustment (COLA) may generate a change NOA instead of or in addition to the CF COLA NOA.

During a CalFresh COLA, the Shelter Change NOA can generate in addition to the COLA NOA. For past COLA runs, the Shelter Change reason has been suppressed via manual DCR. This change will update its trigger logic so that it only generates when the Shelter or Utilities amount has changed and will not generate in addition to the COLA NOA.

Likewise, the Countable Income Change NOAs – Income Increase and Income Decrease – will be updated so that the proper NOA is generated. Currently the COLA NOA is suppressed when Change NOA for Income Decrease is triggered; this logic will be updated to instead suppress the COLA NOA when the Change NOA for Income Increase is generated, and to suppress the Change NOA when countable income has decreased. Logic will also be updated to prioritize sending a NOA for a change in Household Size instead of a COLA NOA. For a visualization of these scenarios, see Appendix.

Lastly, minor verbiage updates will be made for the CF COLA Change Reason and the Change Message Fragment that populates on each of these NOAs.

1.2 Requests

Update verbiage and triggers for COLA-related CalFresh NOAs.

1.3 Overview of Recommendations

1. Update the CalFresh Shelter Change NOA to not trigger if the CF COLA NOA has generated.
2. Update CalFresh COLA Change Reason verbiage.
3. Suppress the COLA NOA if the CF Income Change NOA has generated for Income Increase.
4. Suppress the COLA NOA if the the Household Size Change NOA has generated.
5. Suppress the CF Income Change NOA if the CF COLA NOA has generated for income Decrease.
6. Update CF_CH_MESSAGE2 verbiage.

1.4 Assumptions

1. No other changes will be made to the mentioned Change NOAs' trigger conditions or verbiage.
2. No changes will be made to the order of fragments on CF change NOAs.
3. Threshold Languages for CF COLA Change reason will be added with CA-227471

2 RECOMMENDATIONS

2.1 Update CalFresh Shelter Change NOA

2.1.1 Overview

Update the CalFresh Shelter Change NOA to not trigger if the CF COLA NOA has generated.

Reason Fragment Name and ID:
CF_CH_SHLTR_UTLTY_AMNT_CHANGE_F712
ID: 7252
State Form/NOA: CF 377.4 SAR (6/13)
NOA ID: 1416
Current NOA Template: CF 377.4 SAR (6/13)
Current Program(s): CalFresh
Current Action Type: Change (CF_CH_ACTION1)
Current Fragment Level: Program
Currently Repeatable: N
Include NA Back 9: Y
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

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

2.1.2 Updates to Fragment Generation

Update the CF Shelter and Utilities Change reason rules to not generate if the CF COLA NOA has already generated for the current EDBC.

New NOA Template: N
New Program Generation: N
New Action Type: N
Update to Fragment Level: N
New Forms/NOAs Generated with this NOA: N

2.2 Update CalFresh COLA Change Reason Verbiage

2.2.1 Overview

Update the CF COLA Change Fragment Verbiage for formatting and clarity.

Reason Fragment Name and ID: CF_CH_NEW_COLA _BENEFIT_AMT
ID: 7480
State Form/NOA: CF 377.4 SAR (6/13)
NOA ID: 4866
Current NOA Template: CF 377.4 SAR (6/13)
Current Program(s): CalFresh
Current Action Type: Change (CF_CH_ACTION1)
Current Fragment Level: Program
Currently Repeatable: N
Include NA Back 9: Y
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English, Spanish

2.2.2 Update Fragment XDP

Update the CF COLA Change Reason verbiage.

Updated Languages:

English, Spanish

NOA Mockups/Examples: See Supporting Documents #2

Description	Existing Text	Updated Text	Formatting*
Static Text (English)	Your change in CalFresh benefits are due to the annual Calfresh Cost of Living Adjustment that is effective VARIABLE. This is due to federal and State regulations.	Your change in CalFresh benefits is due to the CalFresh Cost of Living Adjustment that is effective VARIABLE. This is due to federal and state regulations.	Arial, Size 10
Static Text (Spanish)	Su cambio en los beneficios de CalFresh se debe al ajuste anual del costo de vida de CalFresh que es efectivo el VARIABLE. Esto se debe a las regulaciones federales y estatales.	Su cambio en los beneficios de CalFresh se debe al ajuste del costo de vida de CalFresh que es efectivo el VARIABLE. Esto se debe a las regulaciones federales y estatales.	Arial, Size 10

2.3 Update CalFresh COLA Change NOA to not generate when Income Increases

2.3.1 Overview

Update the CF COLA NOA to not generate when the CF Income Change NOA for an Income NOA has generated for the current EDBC.

Reason Fragment Name and ID: CF_CH_COLA_NEW_BENEFIT_AMT
ID: 7480
State Form/NOA: CF 377.4 SAR (6/13)
NOA ID: 4866
Current NOA Template: CF 377.4 SAR (6/13)
Current Program(s): CalFresh
Current Action Type: Change (CF_CH_ACTION1)
Current Fragment Level: Program
Currently Repeatable: N
Include NA Back 9: Y
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

COLA NOA: English, Spanish

Income Increase NOA: English, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.3.2 Updates to Fragment Generation

Update the CF COLA NOA to not generate if the Income Change NOA (CF_CH_CNTBL_INC_INCR_F704) or the Household Size Change NOA (CF_CH_HHSIZE_INCR_F702) has already generated for the current EDBC.

New NOA Template: N
New Program Generation: N
New Action Type: N
Update to Fragment Level: N
New Forms/NOAs Generated with this NOA: N

2.4 Update CalFresh COLA Change NOA to not generate when Household Size has changed

2.4.1 Overview

Update the CF COLA NOA to not generate when the CF Household Size Changed NOA has generated for the current EDBC.

Reason Fragment Name and ID: CF_CH_COLA_NEW_BENEFIT_AMT
ID: 7480
State Form/NOA: CF 377.4 SAR (6/13)
NOA ID: 4866
Current NOA Template: CF 377.4 SAR (6/13)
Current Program(s): CalFresh
Current Action Type: Change (CF_CH_ACTION1)
Current Fragment Level: Program
Currently Repeatable: N
Include NA Back 9: Y
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

COLA NOA: English, Spanish

Household Size Change NOA: English, Spanish

2.4.2 Updates to Fragment Generation

Update the CF COLA NOA to not generate if the Household Size Change NOA (CF_CH_HHSIZE_INCR_F702) has already generated for the current EDBC.

New NOA Template: N
New Program Generation: N
New Action Type: N
Update to Fragment Level: N
New Forms/NOAs Generated with this NOA: N

2.5 Update CalFresh Countable Income Decrease Reason

2.5.1 Overview

Suppress the CalFresh Income Change NOA when for the reason is Income Decrease and the CF COLA Change NOA has generated.

Reason Fragment Name and ID: CF_CH_CNTBL_INC_DCRSD_F703
ID: 6116
State Form/NOA: CF 377.4 SAR (6/13)
NOA ID: 777
Current NOA Template: CF 377.4 SAR (6/13)
Current Program(s): CalFresh
Current Action Type: Change (CF_CH_ACTION1)
Current Fragment Level: Program
Currently Repeatable: N
Include NA Back 9: Y

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

Existing Languages:

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

2.5.2 Updates to Fragment Generation

Update the CalFresh Income Change NOA rule to not generate when the income has decreased and the COLA NOA (CF_CH_COLA_NEW_BENEFIT_AMT) has generated.

New NOA Template: N
New Program Generation: N
New Action Type: N
Update to Fragment Level: N
New Forms/NOAs Generated with this NOA: N

2.6 Update CalFresh Message 2 Fragment Verbiage

2.6.1 Overview

Update the verbiage used by the Message Fragment that generates on COLA-related and other CalFresh NOAs to remove unnecessary verbiage.

Message Fragment Name and ID: CF_CH_MESSAGE2

ID: 5005

State Form/NOA: CF 377.4 SAR (6/13)

Current Program(s): CalFresh

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages:

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

2.6.2 Updates to Fragment XDP

Update the Message Fragment that generates on COLA-related and other CalFresh Change NOAs to remove "Your new cash aid amount is figured on this page."

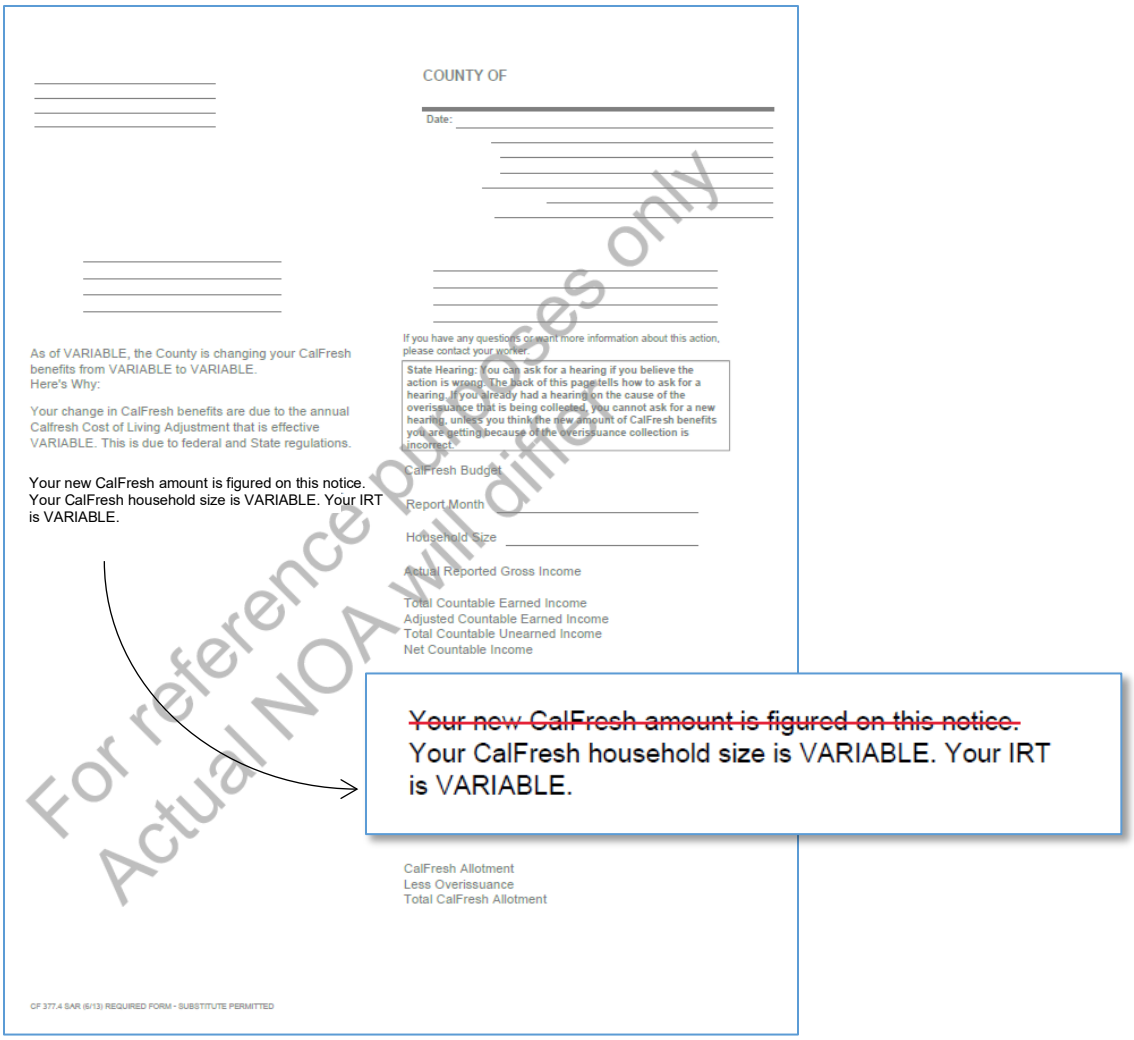
Updated Languages:

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

Description	Existing Text	Updated Text	Formatting*
Static Section	Your new CalFresh amount is figured on this notice. Your CalFresh household size is VARIABLE. Your IRT is VARIABLE.	Your CalFresh household size is VARIABLE. Your IRT is VARIABLE.	Arial, size 10

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

For Spanish and Threshold language translations, see Supporting Documents.



For illustrative purposes only. Actual system generated NOAs will differ.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	Threshold language translations for CF_CH_MESSAGE2, containing current verbiage and updated verbiage.	CA-206711 CF_CH_MESSAGE2 Translations (Excel)
2	Client Correspondence	CF COLA NOA Mockup with updated verbiage for the CF COLA Change Fragment and CF_CH_MESSAGE2	COLA Change NOA Sample (Adobe PDF)

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1237 2.18.3.1	The LRS shall automatically generate the following correspondence online or in the batch process, as a result of individual and/or case action initiated by the LRS or by COUNTY-specified Users, except when exempt due to program requirements: a. Adverse notices (includes: decrease, collection, denial, or termination of benefits); b. Non-adverse notices (includes: approval, increase in benefits, no change, and rescission); and c. Non-approval notices (includes: cancellation, withdrawal, informational, and benefit issuance).	This update will adjust the prioritization of CF Change NOAs to utilize more precise fragments and verbiage to inform individuals of benefits changes.

5 APPENDIX

5.1 NOA Generation and Suppression Scenarios

Below are scenarios outlining which NOA will be generated when it is a COLA run month *and* other change conditions are met.

Using the first row as an example, even though the COLA fragment's conditions are met, its NOA generation is suppressed because there was an Income Increase. A Change NOA with the Income Increase reason will be generated instead.

The fragment that triggers and appears on the generated NOA appears **in bold and highlighted in blue**.

COLA NOA Reason	CalFresh Change NOA Reasons				NOA Generated
COLA Benefit Change applicable for benefit month	**Income Increase** applicable for benefit month	**Income Decrease** applicable for benefit month	**Shelter Change** applicable for benefit month	**Household Size Change** applicable for benefit month	
Yes	**Yes**	--	No	No	CF Change NOA
Yes	--	Yes	No	No	CF COLA NOA
Yes	No	No	Yes	No	CF COLA NOA
Yes	No	No	No	**Yes**	CF Change NOA

NOA Generation and Suppression Scenarios

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213759

Update Child Support Interface to send correct Begin Date

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/16/2021	1.0	Initial Design	Sowmya Coppisetty

Table of Contents

1 Overview 4
1.1 Current Design 4
1.2 Requests 4
1.3 Overview of Recommendations 4
1.4 Assumptions 4
2 Recommendations 5
2.1 CCSAS Outbound Interface Update 5
2.1.1 Overview 5
2.1.2 Description of Change 5
2.1.3 Execution Frequency 6
2.1.4 Key Scheduling Dependencies 6
2.1.5 Counties Impacted 6
2.1.6 Data Volume/Performance 6
2.1.7 Interface Partner 7
2.1.8 Failure Procedure/Operational Instructions 7
2.2 [Automated Regression Test] 7
2.2.1 Overview 7
2.2.2 Description of Change 7
3 Requirements 7
3.1 Project Requirements 7

1 OVERVIEW

CalSAWS determines eligibility before sending any of the members in the CCSAS Outbound file. Fields related to eligibility include Eligibility Status, Aid Code, Eligibility Effective Begin Date, Beginning Date of Aid, Date of Authorization, Aid Discontinuance Date, and Aid Discontinuance Reason.

This SCR will update the CCSAS Outbound interface logic to set the Beginning Date of Aid appropriately when there is a change in the CCSAS eligibility status.

1.1 Current Design

Currently, when the eligibility status of the Absent Parent, Custodial Parent, Dependent Person (the child), and Other Persons associated to the Child Support Referral is updated, the Beginning Date of Aid data element in the outbound file is populated with the aid code begin date (i.e., first date being active without a break in aid) associated to the program.

1.2 Requests

Update the CCSAS Outbound interface to set the Beginning Date of Aid data element appropriately when there is a change in the eligibility status.

1.3 Overview of Recommendations

Update the CCSAS Outbound interface logic of populating the Beginning Date of Aid when there is a change in the eligibility status with the effective date of when the person's status/role has changed.

1.4 Assumptions

None

2 RECOMMENDATIONS

2.1 CCSAS Outbound Interface Update

2.1.1 Overview

Update the CCSAS Outbound Interface logic of populating the Beginning Date of Aid data element when there is a change in the person's eligibility status.

2.1.2 Description of Change

1. Update the CCSAS Outbound Interface logic to populate the Beginning Date of Aid (BEGIN_DATE_OF_AID) data element when there is a change in eligibility status with the effective date of when the person's eligibility status has been updated.

    a. For existing referrals in which a person's eligibility status is updated from being an eligible member to an ineligible member, populate the Beginning Date of Aid with the effective date of when the person's eligibility status has changed.

    Example 1: A person is an Active Member on a CW program and becomes an Active UP (SSI) effective March 1, 2021. The CCSAS Outbound Interface will detect the status change on March 1, 2021 and send an update transaction to CCSAS with 03/01/2021 for the BEGIN_DATE_OF AID.

    b. For new referrals in which the person was not previously active, set the Beginning Date of Aid to be the effective date of when the child's eligibility status has been established.

    Example 2: A new CW application is processed on March 1, 2021 and the child is established at intake with a role code of FRI (Undocumented Child). The CCSAS Outbound Interface will send a new referral transaction to CCSAS with the child's member transaction contains 03/01/2021 as the BEGIN_DATE_OF_AID.

    c. For persons that transition from ineligible status to eligible, set the Beginning Date of Aid to the effective date of when the child's status was updated to eligible.

    Example 3: There exists a child with an Active FRI (Undocumented Child) status with Beginning Date of Aid of 11/1/2020. On 03/01/2021, the child's status is updated from

Active FRI to Active Member. The CCSAS Outbound Interface will send an update transaction to CCSAS with 03/01/2021 as the BEGIN_DATE_OF_AID.

2. Update the logic of populating the Beginning Date of Aid (BEGIN_DATE_OF_AID) data element when the program status is updated to Discontinued as follows:

    a. For persons in the program with 'ineligible' eligibility status (i.e. SSI or Undocumented Child) being discontinued, populate the Beginning Date of Aid with effective date of when the person was identified as ineligible.

    Example 4: There is an active CalWORKs program with a person of eligibility status of SSI with begin date of 01/01/2021, discontinued on 03/01/2021. The CCSAS outbound interface will send an update transaction on 03/01/2021 with BEGIN_DATE_OF AID as 01/01/2021 for the SSI person.

    b. For persons in the program with 'Eligible' eligibility status (Eligible/Optional Child) being discontinued, populate the Beginning Date of Aid with effective date of when the person was identified as eligible

    Example 5: There is an active CalWORKs program with a person with eligibility status as 'Optional Child' with begin date of 01/01/2021, discontinued on 03/01/2021. The CCSAS outbound interface will send an update transaction on 03/01/2021 with BEGIN_DATE_OF AID as 01/01/2021 for the Optional Child Person

Commented [CS1]: Add more detailed infoo

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Data Volume/Performance

No anticipated data volume or performance impacts.

2.1.7 Interface Partner

California Child Support Automation System (CCSAS)

2.1.8 Failure Procedure/Operational Instructions

No Change.

2.2 [Automated Regression Test]

2.2.1 Overview

[Provide an overview of the automated regression test that needs to be updated.]

2.2.2 Description of Change

1. [Provide a detailed description of what needs to be updated in the automated regression test.]
    a. Sub point (if needed)
        i. additional sub point (if needed)
            1. Additional sub point (if needed)
2. Next Change (if needed)

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.5	The LRS shall automatically evaluate/process ED/BC accounting for the impact of change(s) on all assistance units on a case, on an individual, and on any or all companion cases that could potentially be affected by the change(s).	This SCR updates the logic of populating the Beginning date of aid data element in the CCSAS Outbound Interface file.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215013 | DDID 2589

Add GEN 107- Message From The County (08/2020) in threshold languages

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sureshnaidu Mullaguri
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/23/2021	0.1	Initial Draft	Sureshnaidu Mullaguri

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Table of Contents

1 Overview 4

1.1 Current Design 4

1.2 Requests 4

1.3 Overview of Recommendations 4

1.4 Assumptions 4

2 Recommendations 5

2.1 Add Form GEN 107 – Message From The County (08/2020) in threshold languages 5

2.1.1 Overview 5

2.1.2 Create Form GEN 107 XDPs in threshold languages 5

3 Supporting Documents 7

4 Requirements 7

4.1 Migration Requirements 7

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1 OVERVIEW

SCR CA-215012 added the GEN 107 – Message From The County (08/2020) State form to the CalSAWS system in English and Spanish only. This SCR will add the GEN 107 – Message From The County (08/2020) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the GEN 107 State form is implemented in the CalSAWS in English and Spanish with the version date of (08/2020).

1.2 Requests

Implement State Form GEN 107 – Message From The County (08/2020) in the CalSAWS system for all 58 counties in the remaining threshold languages Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form GEN 107 – Message From The County (08/2020) in the 11 supported threshold languages.

1.4 Assumptions

1. The GEN 107 threshold form will have CalSAWS Standard Header in respective threshold language.
2. Form Population logic, parameters, print, Mailing and barcode requirements for threshold GEN 107 form remains the same as existing GEN 107 form English and Spanish forms.
3. All the Requirements for the GEN 107 threshold forms will be the same as the existing GEN 107 English version form.

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2 RECOMMENDATIONS

2.1 Add Form GEN 107 – Message From The County (08/2020) in threshold languages

2.1.1 Overview

This SCR will add the State form GEN 107 – Message From The County (08/2020) to the CalSAWS system in the remaining threshold languages.

State Form: GEN 107 (8/20)

Programs: All

Attached Forms: None

Forms Category: NOA

Template Repository Visibility: All Counties

Languages:

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

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

2.1.2 Create Form GEN 107 XDPs in threshold languages

1. The newly added threshold languages will be made available in the Template Repository. Please see the Supporting Documents #1 for details.

   Form Header: CalSAWS Standard Header #1

   Form Title (Document List Page Displayed Name): Message From The County

   Template Description: This form is a Message from The County to Customers. The body of the letter is typed by Workers.

   Form Number: GEN 107

   Include NA Back 9: No

   Imaging Form Name: Refer SCR CA-214054

   Imaging Document Type: Refer CA-214054

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

2. Add Form GEN 107 to the Template Repository in the rest of the threshold languages for all Counties.

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

3. The Print Options and Mailing Requirements for Form GEN 107 will carry over to the rest of the threshold languages.

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	GEN 107 Threshold Languages	GEN_107_Arabic.pdf GEN_107_Armenian.pdf GEN_107_Cambodian.pdf GEN_107_Chinese.pdf GEN_107_Farsi.pdf GEN_107_Hmong.pdf GEN_107_Korean.pdf GEN_107_Lao.pdf GEN_107_Russian.pdf GEN_107_Tagalog.pdf GEN_107_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2589	The CONTRACTOR shall add State Form GEN 107 - Message From The County in the threshold languages.	Revised assumptions approved at App Dev Lead meeting on September 8, 2020: 1. Estimate is for adding the State Form in the threshold languages. 2. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 3. 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. Original assumptions from Exhibit U:	With SCR CA-215013, State Form GEN 107 – Message From The County will be added to the CalSAWS in the threshold languages.

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		1. Estimate is for migrating the form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215122 | DDID 2644

FDS: Non-State Forms - Add New State Form CR 6181

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/04/2021	1.0	Original	Harish Katragadda

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Table of Contents

1 Overview 4

1.1 Current Design 4

1.2 Requests 4

1.3 Overview of Recommendations 4

1.4 Assumptions 4

2 Recommendations 4

2.1 CR 6181 (11/2020) – Interpreter Services Statement and Confidentiality Agreement Form 4

2.1.1 Overview 4

2.1.2 Description of Change 5

3 Supporting Documents 6

4 Requirements 7

4.1 Migration Requirements 7

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1 OVERVIEW

The purpose of this change is to add State form CR 6181 (11/2020) Interpreter Services Statement and Confidentiality Agreement Form in CalSAWS system and make this form available for all 58 counties.

1.1 Current Design

State form CR 6181 (11/2020) is currently not available in CalSAWS Template Repository.

1.2 Requests

1. Add State form CR 6181 (11/2020) Interpreter Services Statement and Confidentiality Agreement Form to CalSAWS Template Repository in English and Spanish and make it available to all 58 counties.

1.3 Overview of Recommendations

1. Add CR 6181 (11/2020) State Form, based on the Fresno 2229 Client Waiver of Free Interpretation Services to CalSAWS Template Repository in English and Spanish.

2. Make the CR 6181 (11/2020) Form available to all 58 counties.

1.4 Assumptions

1. All Form Fields are editable unless specified.

2 RECOMMENDATIONS

2.1 CR 6181 (11/2020) – Interpreter Services Statement and Confidentiality Agreement Form

2.1.1 Overview

This section will cover the updates needed for CR 6181 (11/2020) form.

State Form: CR 6181 (11/2020)
Programs: All
Attached Forms: N/A
Forms Category: Forms
Template Repository Visibility: All Counties
Languages: English, Spanish

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2.1.2 Description of Change

1. Add CR 6181 (11/2020) Interpreter Services Statement and Confidentiality Agreement Form in English, Spanish.

   a. Create CR 6181 (11/2020) Interpreter Services Statement and Confidentiality Agreement Form XDPs

   Form Header: Cover Page with CalSAWS Standard Header

   Form Title: Interpreter Services Statement and Confidentiality Agreement

   Template Description: Form for Customer Interpreter Services and Confidentiality Agreement for Interpreter Services

   Form Number: CR 6181

   Include NA Back 9: No

   Imaging Form Name: Interpreter Agreement

   Imaging Document Type: Language

   Form Mockup/Example: See Supporting Documents #1

2. CalSAWS standard footer will be used for the form.

3. Add the CR 6181 (11/2020) – Interpreter Services Statement and Confidentiality Agreement Form to Template Repository. The following parameters will be required:

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

4. Make the CR 6181 (11/2020) Form available to all 58 counties.

5. Add the following barcode options to the CR 6181 (11/2020) Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. Add the following print options to the CR 6181 (11/2020) Form:

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

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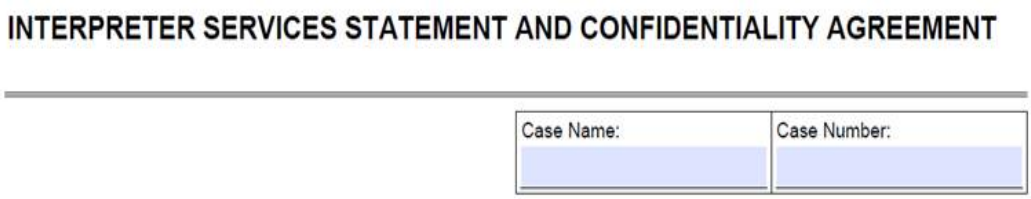
Y	Y	Y	Y	Y	Y

7. CR 6181 Form Population



Section	Field	Description	EDITABLE
CR 6181 - Page 1	Case Name	Populate with the Case Name for which the form is generated (Same Value as in the Header)	Y
CR 6181 - Page 1	Case Number	Populate with the Case Number for which the form is generated (Same Value as in the Header)	Y

Mailing Requirements:
Mail-To (Recipient): Case Person selected on the Document parameter page
Mailed From (Return): Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: N/A
Post to SSP (Self Service Portal): Y
Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

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1	Correspondence	CR 6181 (11/2020)	CR 6181_EN.pdf CR 6181_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2644	The CONTRACTOR shall add State form CR 6181 - Interpreter Services Statement and Confidentiality Agreement to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.	1. Estimate is for implementing the new form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	With CA-215122 State Form CR 6181 will be added in English and Spanish to CalSAWS Template Repository. CR 6181 will be available to all 58 counties.

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217304

DDID 34 FDS Task Mgmt - Dashboard Updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Remi Lassiter
	Reviewed By	Ravneet Bhatia, Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/1/2021	1.0	Initial document	Remi Lassiter

Table of Contents

1 Overview 4
1.1 Current Design 4
1.2 Requests 4
1.3 Overview of Recommendations 5
1.4 Assumptions 5
2 Recommendations 6
2.1 Task Management Dashboard 6
2.1.1 Overview 6
2.1.2 Task Management Dashboard Mockup 6
2.1.3 Description of Change 8
2.1.4 Report Location 14
2.1.5 Counties Impacted 14
2.1.6 Security Updates 14
2.1.7 Report Usage/Performance 14
3 Supporting Documents 14
4 Requirements 15
4.1 Project Requirements 15
4.2 Migration Requirements 15
5 Migration Impacts 17
6 Appendix 18
6.1 Task Management Dashboard Mockup (cont.) 18

1 OVERVIEW

This SCR is a part of DDID 34 which seeks to implement a Unified Task Management Solution that supports the multiple tasking models across C-IV and LRS. This SCR will update the Task Management Dashboard to account for the system modifications being made as part of migration, specifically:

1. Update the dashboard to filter by and report Bank assignments.
2. Update the dashboard to report tasks with a status of "In Process".

1.1 Current Design

The Task Management Dashboard provides real-time and historical data on task management and productivity. It consists of four summary sheets and fifteen drill down detail sheets.

The following are the summary sheets:

- Historical Task Management Sheet
- Real Time Task Management Sheet
- Historical Task Management Productivity Sheet
- Real Time Task Management Productivity Sheet

The following are the detail sheets:

- # Assigned Tasks by Category (Historical Task Management) Sheet
- # Completed Tasks by Category (Report 388) Sheet
- # Completed Tasks by Category (Historical Task Management Productivity) Sheet
- # Assigned Task vs # Workers – Task List Sheet
- # Assigned Tasks vs # Workers – Worker List Sheet
- # Completed Tasks by Category (Historical Task Management) Sheet
- # Assigned Tasks by Category (Report 387) Sheet
- # Overdue Tasks (Report 386) Sheet
- # Assigned Tasks by Category (Report 301) Sheet
- # Completed Tasks During Current Day by Division (Report 304) Sheet
- # Completed Tasks During Current Day by Category (Report 303) Sheet
- # Assigned Tasks by Category (Report 383) Sheet
- # Completed Tasks During Current Day by Category (Report 382) Sheet
- # Overdue Tasks (Report 381) Sheet
- # Overdue Tasks (Report 305) Sheet

The dashboard currently filters by and displays information on the Division, Office, and Unit of the task's worker assignment. There is no filter or columns for Bank assignment.

The dashboard also displays summary metrics for tasks based on assigned, completed or overdue status. Tasks with a status of "In Process" are not included in the dashboard.

1.2 Requests

1. Update the dashboard to filter by and report Bank assignments.

2. Update the dashboard to report tasks with a status of "In Process".

1.3 Overview of Recommendations

1. Make the following updates to enable the dashboard to filter by and report Bank assignments:
    a. Add a new Bank filter to the summary Sheets.
    b. Update the Division, Office and Unit dropdowns to filter by the division, office and unit of a task's assigned bank for tasks that have no worker assigned.
    c. Add a new Bank column to the detail sheets.
    d. Update the Division, Office and Unit columns to display the division, office and unit of the task's assigned bank for tasks that have no worker assigned.
2. Make the following updates to enable the dashboard to report tasks with a status of "In Process":
    a. Update all instances of "Assigned Tasks" to be inclusive of data with a status of "Assigned" or "In Process".
        i. Update the labeling of these instances from "Assigned" to "Open".
    b. Update all instances of "Overdue Tasks" to be inclusive of tasks with a status of "Assigned" or "In Process" that are overdue.

1.4 Assumptions

1. The dashboard was soft launched in Qlik in January 2021 with an expected hard launch in June 2021.

2 RECOMMENDATIONS

2.1 Task Management Dashboard

2.1.1 Overview

Update the Task Management Dashboard to filter by and report Bank assignments and to report tasks with a status of "In Process".

2.1.2 Task Management Dashboard Mockup

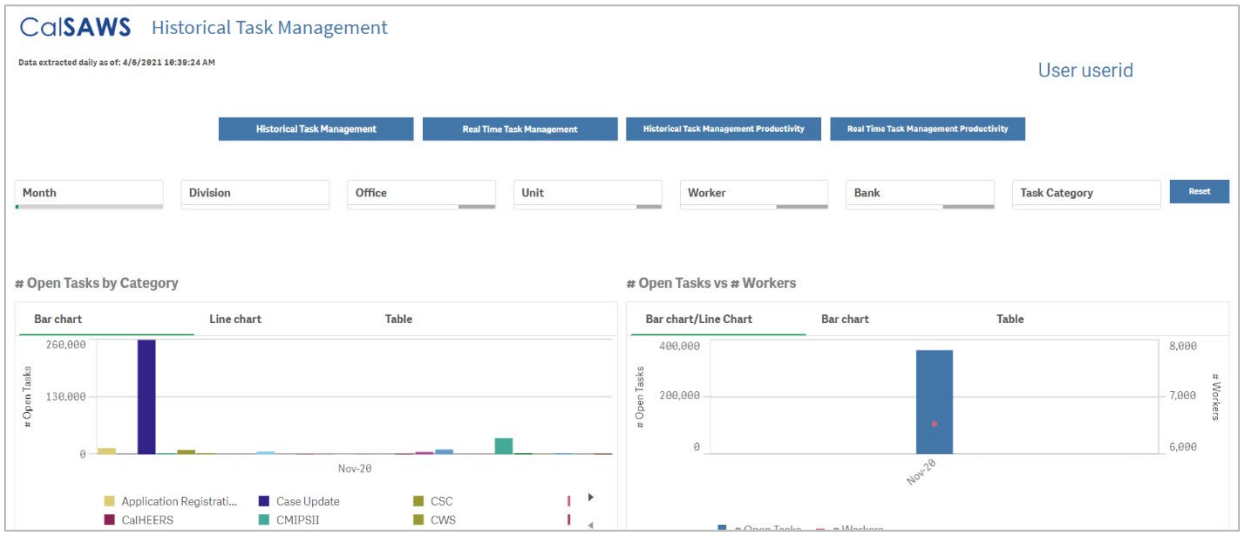


Figure 2.1.1 – Task Management Dashboard Mockup - Historical Task Management Sheet

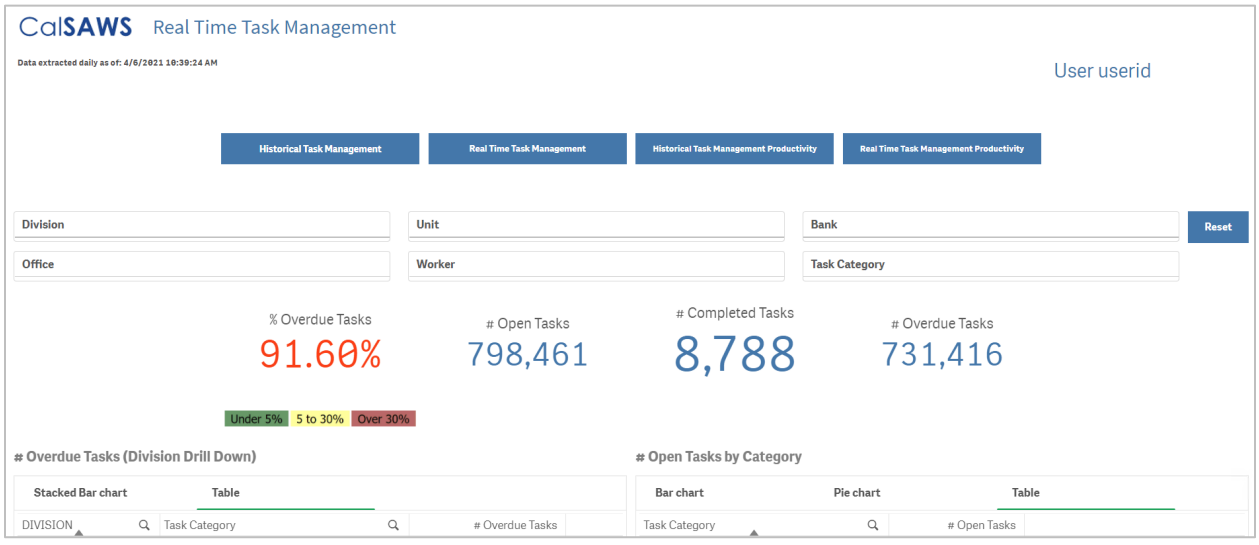


Figure 2.1.2 – Task Management Dashboard Mockup – Real Time Task Management Sheet

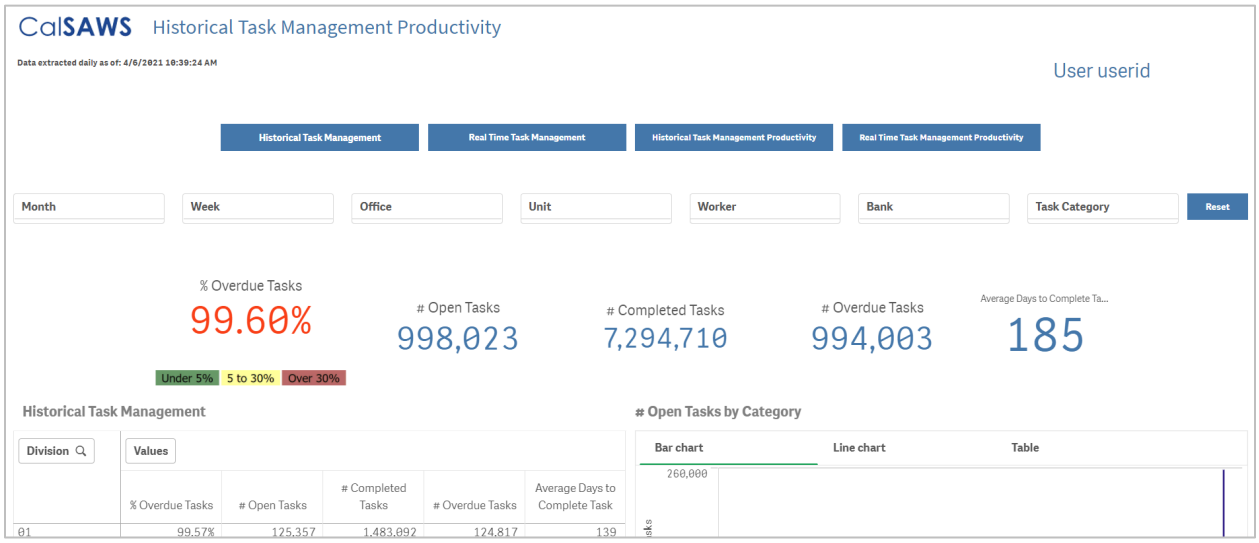


Figure 2.1.3 – Task Management Dashboard Mockup - Historical Task Management Productivity Sheet

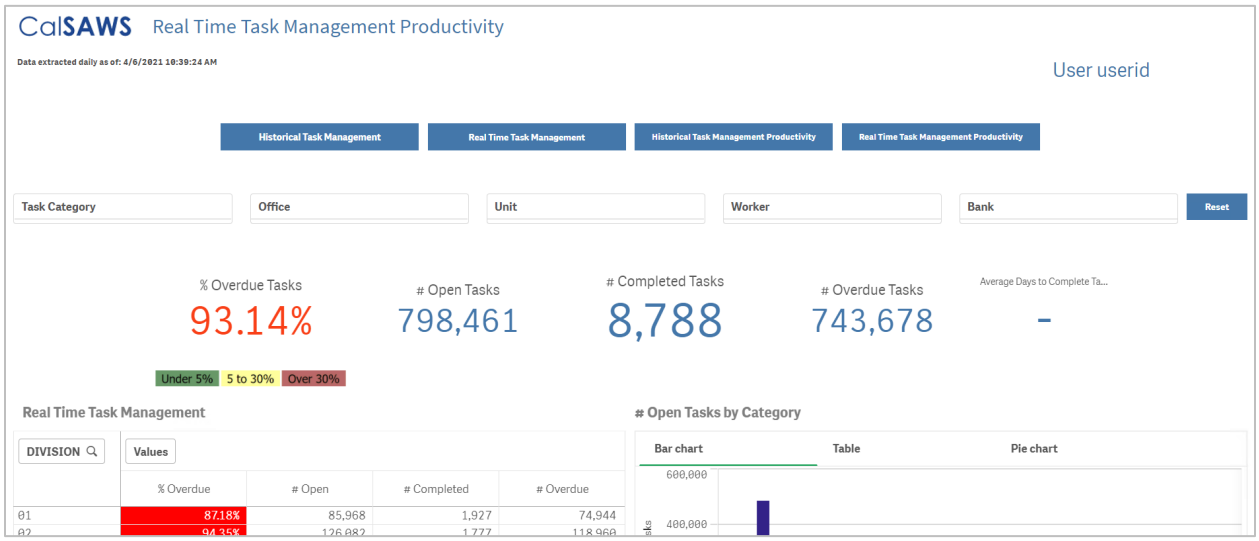


Figure 2.1.4 – Task Management Dashboard Mockup – Real Time Task Management Productivity Sheet

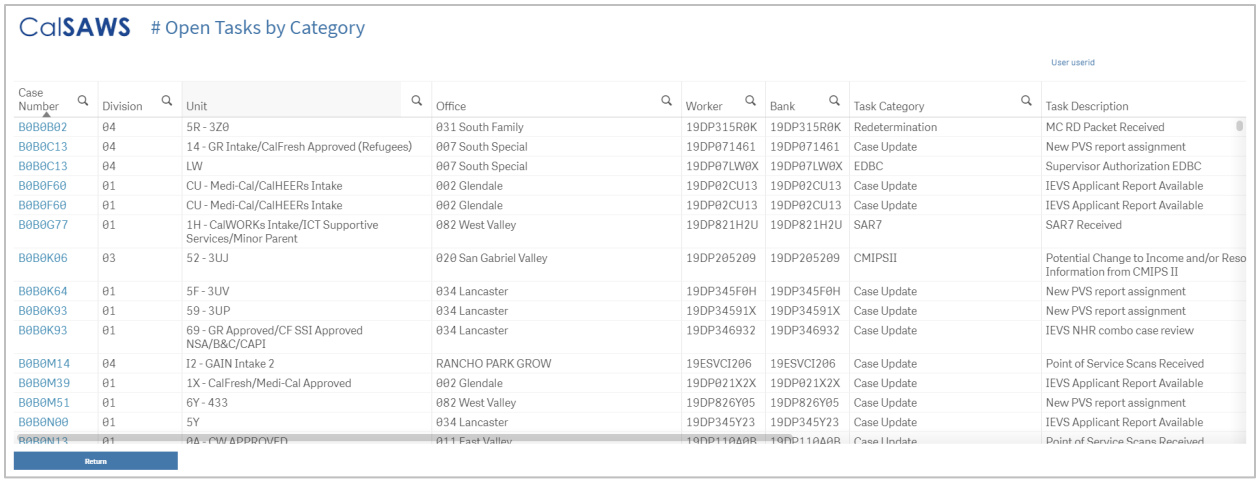


Figure 2.1.5 – Task Management Dashboard Mockup - # Open Tasks by Category (Historical Task Management) Sheet

Note: This is the updated sheet title as per the recommendations described in this SCR.

For the brevity of this section, the remainder of the mockup screenshots can be found in Appendix 6.1 Task Management Dashboard Mockup (cont.) These sheets include:

- # Completed Tasks by Category (Report 388) Sheet
- # Completed Tasks by Category (Historical Task Management Productivity) Sheet
- # Open Task vs # Workers – Task List Sheet*
- # Open Tasks vs # Workers – Worker List Sheet*
- # Completed Tasks by Category (Historical Task Management) Sheet
- # Open Tasks by Category (Report 387) Sheet*
- # Overdue Tasks (Report 386) Sheet
- # Open Tasks by Category (Report 301) Sheet*
- # Completed Tasks During Current Day by Division (Report 304) Sheet
- # Completed Tasks During Current Day by Category (Report 303) Sheet
- # Open Tasks by Category (Report 383) Sheet*
- # Completed Tasks During Current Day by Category (Report 382) Sheet
- # Overdue Tasks (Report 381) Sheet
- # Overdue Tasks (Report 305) Sheet

*Note: This is the updated sheet title as per the recommendations described in this SCR.

2.1.3 Description of Change

1. Enable the Task Management Dashboard to filter by and report task Bank assignments.
    a. Make the following updates to the summary sheets:
        i. Add a new dropdown filter for Bank.
        ii. Update the Division, Office and Unit dropdowns to filter by the division, office and unit of a task's assigned bank for tasks that have no worker assigned to them. In other words, if a task is assigned to both a worker and bank,

worker will take precedence for Division, Office and Unit information.

1. For example, if Division 01 is selected, the dashboard will display data for all tasks with an assigned worker in Division 01 plus all tasks with assigned Bank in Division 01 that don't have an assigned worker.
2. **Technical Note:** Filter by division/office/unit of TASK.POS_ID first. If TASK.POS_ID is NULL, filter by division/office/unit of TASK.BANK_ID instead.

b. Make the following updates to all detail sheets EXCEPT the # Open Task vs # Workers – Task List Sheet:
   i. Add a new Bank column.
      1. Insert this column following the Worker column.
   ii. Update the Division, Office and Unit columns to display the division, office and unit of the task's assigned bank for tasks that have no worker assigned to them. See the table below for the updated column definitions.

Column	Definition
Division	The division associated with the task. If a worker is assigned to the task, this value is the division of the worker; otherwise, this is the division of the assigned bank.
Office	The office associated with the task. If a worker is assigned to the task, this value is the office of the worker; otherwise, this is the office of the assigned bank.
Unit	The unit associated with the task. If a worker is assigned to the task, this value is the unit of the worker; otherwise, this is the unit of the assigned bank.
Worker	The Worker ID of the worker assigned to the task. Note: this value may be null.
Bank	The Bank ID of the bank assigned to the task. Note: this value may be null.

The following examples further illustrate how data will be displayed with this change:

- **Example 1: Task with worker assignment and no bank assignment –** The Division, Office and Unit columns will display

the division, office and unit of the assigned worker. The Worker column will display the Worker ID. The Bank column will be null.

- **Example 2: Task with bank assignment and no worker assignment –** The Division, Office and Unit columns will display the division, office and unit of the assigned bank. The Bank column will display the Bank ID. The Worker column will be null.
- **Example 3: Task with worker and bank assignment –** The Division, Office and Unit columns will display the division, office and unit of the assigned worker. The Worker column will display the Worker ID. The Bank column will display the Bank ID.

2. Throughout the dashboard, update all instances of "Assigned" Tasks to be inclusive of data with a status of "Assigned" or "In Process" and update the labeling of these instances from "Assigned" to "Open". In addition, update all instances of "Overdue Tasks" to be inclusive of tasks with a status of "Assigned" or "In Process" that are overdue. The updates by sheet are as follows:
    a. **Historical Task Management Sheet**
        i. Make the following updates to the # Assigned Tasks by Category widget:
            1. Update the title to be "# Open Tasks by Category".
            2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
            3. Update the y-axis of the bar chart and line chart to be "# Open Tasks".
        ii. Make the following updates to the # Assigned Tasks vs # Workers widget:
            1. Update the title to be "# Open Tasks vs # Workers".
            2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
            3. Update the y-axis of the bar/line chart and the bar chart to be "# Open Tasks".
            4. Update the "# Assigned Tasks" column in the table to be "# Open Tasks".
        iii. Make the following updates to the # Assigned Tasks by Category (Division Drill Down) widget:
            1. Update the title to "# Open Tasks by Category (Division Drill Down)".
            2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
            3. Update the y-axis of the bar chart to be "# Open Tasks".
    b. **Real Time Task Management Sheet**

i. Update "# Assigned Tasks" KPI in header to "# Open Tasks" and count tasks with a status of "Assigned" or "In Process".
ii. Update the formula for the "% Overdue Tasks" and "# Overdue Tasks" KPIs in header to count tasks with a status of "Assigned" or "In Process" that are overdue.
iii. Make the following updates to the # Overdue Tasks (Division Drill Down) widget:
    1. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".
iv. Make the following updates to the # Assigned Tasks by Category widget:
    1. Update the title to "# Open Tasks by Category".
    2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
    3. Update the y-axis of the bar chart to be "# Open Tasks".
    4. Update the "# Assigned Tasks" column in the table to be "# Open Tasks".
v. Make the following updates to the # Assigned Tasks by Category (Division Drill Down) widget:
    1. Update the title to "# Open Tasks by Category (Division Drill Down)".
    2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
    3. Update the y-axis of the bar chart to be "# Open Tasks".
    4. Update the "# Assigned Tasks" column in the table to be "# Open Tasks".
vi. Make the following updates to the # Assigned Tasks by Division widget:
    1. Update the title to "# Open Tasks by Division".
    2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
    3. Update the y-axis of the stacked bar chart from "# Assigned Tasks" to be "# Open Tasks".
    4. Update the "# Assigned Tasks" column of the table to be "# Open Tasks".

c. **Historical Task Management Productivity Sheet**
i. Update "# Assigned Tasks" KPI in header to "# Open Tasks" and count tasks with a status of "Assigned" or "In Process".
ii. Update the formula for the "% Overdue Tasks" and "# Overdue Tasks" KPIs in header to count tasks with a status of "Assigned" or "In Process" that are overdue.
iii. Make the following updates to the Historical Task Management widget:

1. Update the formula for the "% Overdue" and "# Overdue Tasks" column of the table to count overdue tasks with a status of "Assigned" or "In Process".
2. Update the "# Assigned Tasks" column in the table to be "# Open Tasks" and to count tasks with a status of "Assigned" or "In Process".
3. Change "Go to Assigned Task List" button label to "Go to Open Task List".

iv. Make the following updated to the # Assigned Tasks by Category widget:
1. Update the title to "# Open Tasks by Category".
2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
3. Update the y-axis of the bar chart and line chart to be "# Open Tasks".

v. Make the following updates to the # Assigned Tasks by Category (Division Drill Down) Widget:
1. Update title to "# Open Tasks by Category (Division Drill Down)"
2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
3. Update the y-axis of the bar chart and line chat to be "# Open Tasks".

vi. Make the following updates to the # Overdue Tasks widget:
1. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".

vii. Make the following updates to the # Overdue Tasks (Division Drill Down) widget:
1. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".

d. **Real Time Task Management Productivity Sheet**

i. Update "# Assigned Tasks" KPI in header to "# Open Tasks" and count tasks with a status of "Assigned" or "In Process".

ii. Update the formula for the "% Overdue Tasks" and "# Overdue Tasks" KPIs in header to count tasks with a status of "Assigned" or "In Process" that are overdue.

iii. Make the following updates to the Real Time Task Management widget:
1. Update the formula for the "% Overdue" and "# Overdue Tasks" column of the table to count overdue tasks with a status of "Assigned" or "In Process".
2. Update the "# Assigned Tasks" column in the table to be "# Open Tasks" and to count tasks with a status of "Assigned" or "In Process".

3. Change "Go to Assigned Task List" button label to "Go to Open Task List".

iv. Make the following updates to the # Assigned Tasks by Category widget:
    1. Update title to "# Open Tasks by Category".
    2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
    3. Update the y-axis of the bar chart to be "# Open Tasks".
    4. Update the "# Assigned Tasks" column to "# Open Tasks".

v. Make the following updates to the # Assigned Tasks by Category (Division Drill Down) widget:
    1. Update the title to "# Open Tasks by Category (Division Drill Down)".
    2. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".
    3. Update the y-axis of the bar chart to be "# Open Tasks".
    4. Update the "# Assigned Tasks" column to "# Open Tasks".

vi. Make the following updates to the # Overdue Tasks widget:
    1. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".

vii. Make the following updates to the # Overdue Tasks (Division Drill Down) widget:
    1. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".

e. **# Assigned Tasks by Category (Historical Task Management) Sheet**
    i. Update title to "# Open Tasks by Category"
    ii. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".

f. **# Assigned Tasks vs # Workers - Task List Sheet**
    i. Update title to "# Open Tasks vs # Workers - Task List"
    ii. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".

g. **# Assigned Tasks vs # Workers - Worker List Sheet**
    i. Update title to "# Open Tasks vs # Workers - Worker List"
    ii. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".

h. **# Assigned Tasks by Category (Report 387) Sheet**
    i. Update title to "# Open Tasks by Category"
    ii. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".

i. # Overdue Tasks (Report 386) Sheet

i. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".

j. **# Assigned Tasks by Category (Report 301) Sheet**
   i. Update title to "# Open Tasks by Category"
   ii. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".

k. **# Assigned Tasks by Category (Report 383) Sheet**
   i. Update title to "# Open Tasks by Category"
   ii. Update the data to be inclusive of tasks with a status of "Assigned" or "In Process".

l. **# Overdue Tasks (Report 381) Sheet**
   i. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".

m. **# Overdue Tasks (Report 305) Sheet**
   i. Update the data to be inclusive of overdue tasks with a status of "Assigned" or "In Process".

2.1.4 Report Location

- **Global:** Reports
- **Local:** Business Intelligence
- **Task:** Real Time Task Management

2.1.5 Counties Impacted

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

2.1.6 Security Updates

N/A

2.1.7 Report Usage/Performance

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
N/A			

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
N/A		

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows: 1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base 2) Create a common task management data model 3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution) 4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County 5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing	- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV. - CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks. - OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation.	Update the Task Management Dashboard to filter by and report Bank assignments and to report tasks with a status of "In Process".

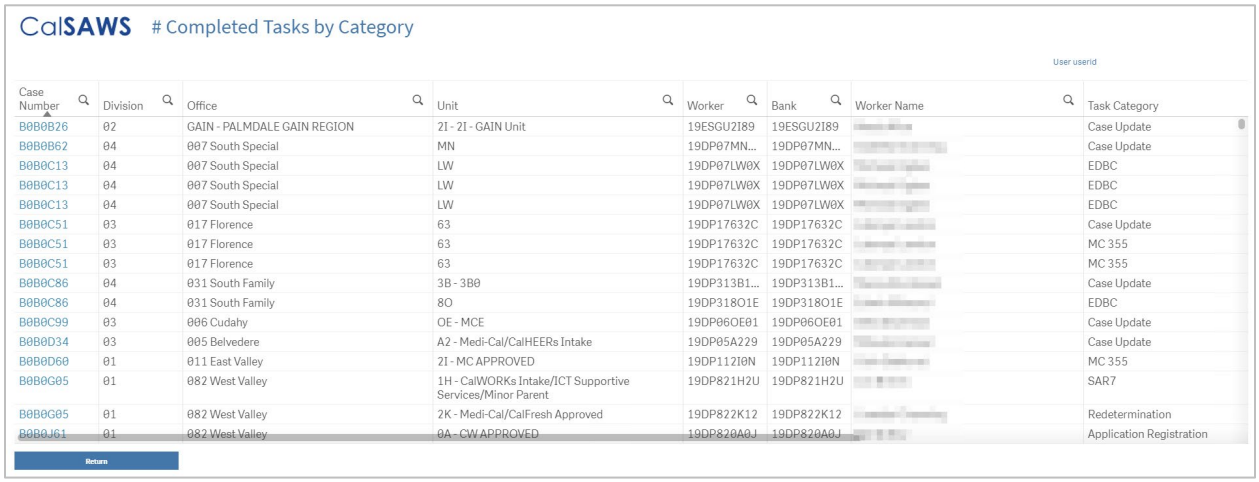
	methodologies 6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker 7) Update the LRS Task Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		

5 MIGRATION IMPACTS

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

6 APPENDIX

6.1 Task Management Dashboard Mockup (cont.)



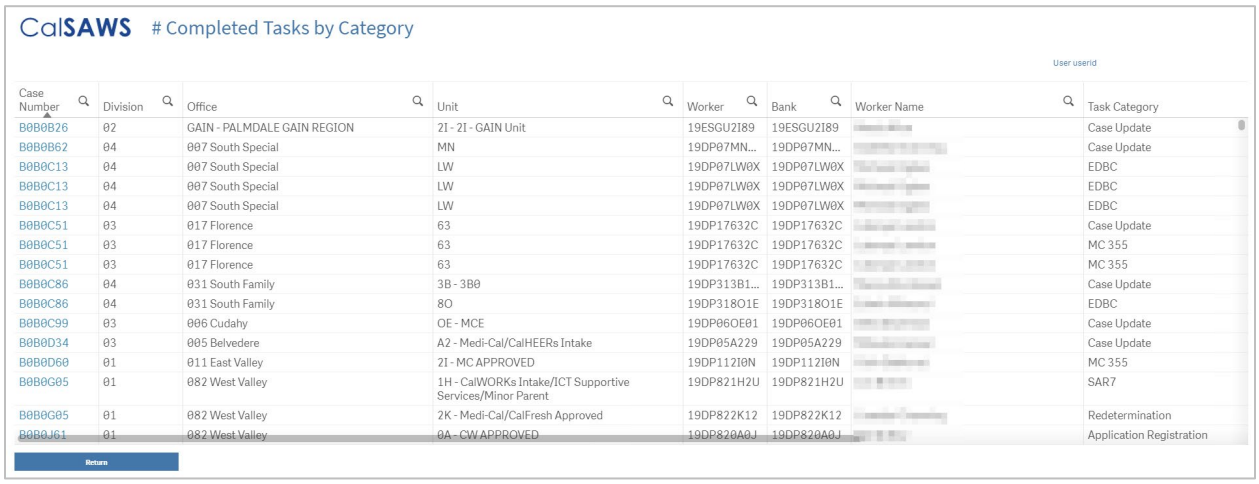
CalSAWS # Completed Tasks by Category

User userid

Case Number	Division	Office	Unit	Worker	Bank	Worker Name	Task Category
B0B0B26	02	GAIN - PALMDALE GAIN REGION	2I - 2I - GAIN Unit	19ESGU2I89	19ESGU2I89		Case Update
B0B0B62	04	007 South Special	MN	19DP07MN...	19DP07MN...		Case Update
B0B0C13	04	007 South Special	LW	19DP07LW0X	19DP07LW0X		EDBC
B0B0C13	04	007 South Special	LW	19DP07LW0X	19DP07LW0X		EDBC
B0B0C13	04	007 South Special	LW	19DP07LW0X	19DP07LW0X		EDBC
B0B0C51	03	017 Florence	63	19DP17632C	19DP17632C		Case Update
B0B0C51	03	017 Florence	63	19DP17632C	19DP17632C		MC 355
B0B0C51	03	017 Florence	63	19DP17632C	19DP17632C		MC 355
B0B0C86	04	031 South Family	3B - 3B0	19DP313B1...	19DP313B1...		Case Update
B0B0C86	04	031 South Family	8O	19DP318O1E	19DP318O1E		EDBC
B0B0C99	03	006 Cudahy	OE - MCE	19DP06OE01	19DP06OE01		Case Update
B0B0D34	03	005 Belvedere	A2 - Medi-Cal/CalHEERs Intake	19DP05A229	19DP05A229		Case Update
B0B0D60	01	011 East Valley	2I - MC APPROVED	19DP112I0N	19DP112I0N		MC 355
B0B0G05	01	082 West Valley	1H - CalWORKs Intake/ICT Supportive Services/Minor Parent	19DP821H2U	19DP821H2U		SAR7
B0B0G05	01	082 West Valley	2K - Medi-Cal/CalFresh Approved	19DP822K12	19DP822K12		Redetermination
B0B0J61	01	082 West Valley	0A - CW APPROVED	19DP820A0J	19DP820A0J		Application Registration

Return

Figure 6.1.1 – Task Management Dashboard Mockup - # Completed Tasks by Category (Report 388) Sheet



CalSAWS # Completed Tasks by Category

User userid

Case Number	Division	Office	Unit	Worker	Bank	Worker Name	Task Category
B0B0B26	02	GAIN - PALMDALE GAIN REGION	2I - 2I - GAIN Unit	19ESGU2I89	19ESGU2I89		Case Update
B0B0B62	04	007 South Special	MN	19DP07MN...	19DP07MN...		Case Update
B0B0C13	04	007 South Special	LW	19DP07LW0X	19DP07LW0X		EDBC
B0B0C13	04	007 South Special	LW	19DP07LW0X	19DP07LW0X		EDBC
B0B0C13	04	007 South Special	LW	19DP07LW0X	19DP07LW0X		EDBC
B0B0C51	03	017 Florence	63	19DP17632C	19DP17632C		Case Update
B0B0C51	03	017 Florence	63	19DP17632C	19DP17632C		MC 355
B0B0C51	03	017 Florence	63	19DP17632C	19DP17632C		MC 355
B0B0C86	04	031 South Family	3B - 3B0	19DP313B1...	19DP313B1...		Case Update
B0B0C86	04	031 South Family	8O	19DP318O1E	19DP318O1E		EDBC
B0B0C99	03	006 Cudahy	OE - MCE	19DP06OE01	19DP06OE01		Case Update
B0B0D34	03	005 Belvedere	A2 - Medi-Cal/CalHEERs Intake	19DP05A229	19DP05A229		Case Update
B0B0D60	01	011 East Valley	2I - MC APPROVED	19DP112I0N	19DP112I0N		MC 355
B0B0G05	01	082 West Valley	1H - CalWORKs Intake/ICT Supportive Services/Minor Parent	19DP821H2U	19DP821H2U		SAR7
B0B0G05	01	082 West Valley	2K - Medi-Cal/CalFresh Approved	19DP822K12	19DP822K12		Redetermination
B0B0J61	01	082 West Valley	0A - CW APPROVED	19DP820A0J	19DP820A0J		Application Registration

Return

Figure 6.1.2 – Task Management Dashboard Mockup - # Completed Tasks by Category (Historical Task Management Productivity) Sheet

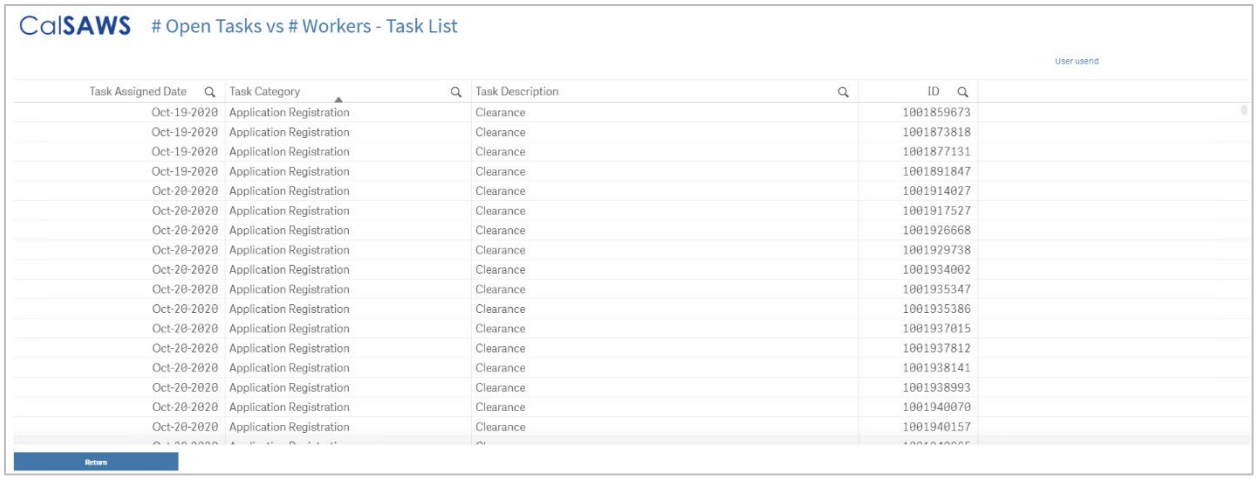


Figure 6.1.3 – Task Management Dashboard Mockup - # Open Task vs # Workers – Task List Sheet

Note: This is the updated sheet title as per the recommendations described in this SCR.

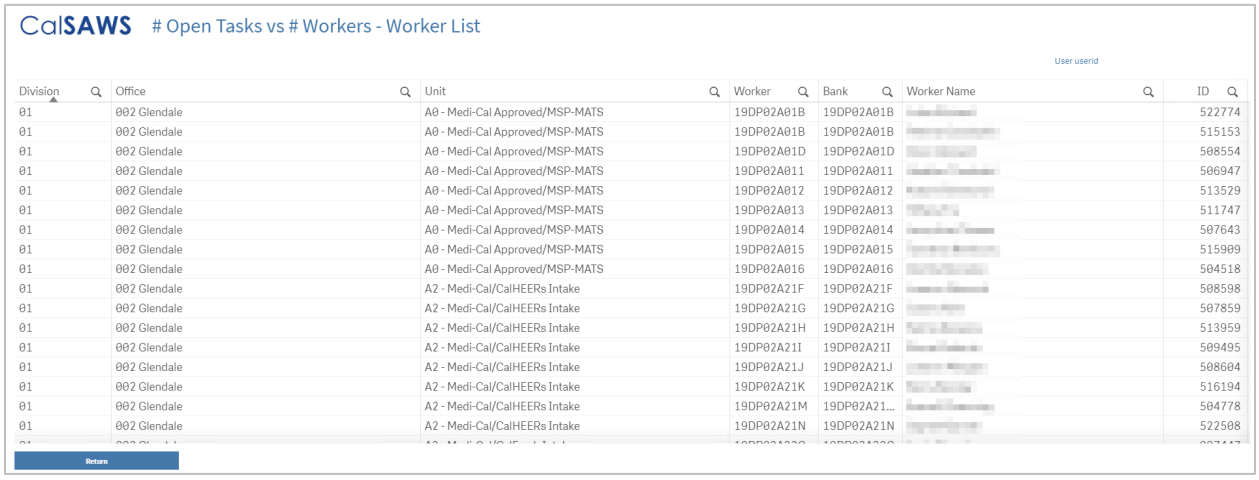


Figure 6.1.4 – Task Management Dashboard Mockup - # Open Tasks vs # Workers – Worker List Sheet

Note: This is the updated sheet title as per the recommendations described in this SCR.

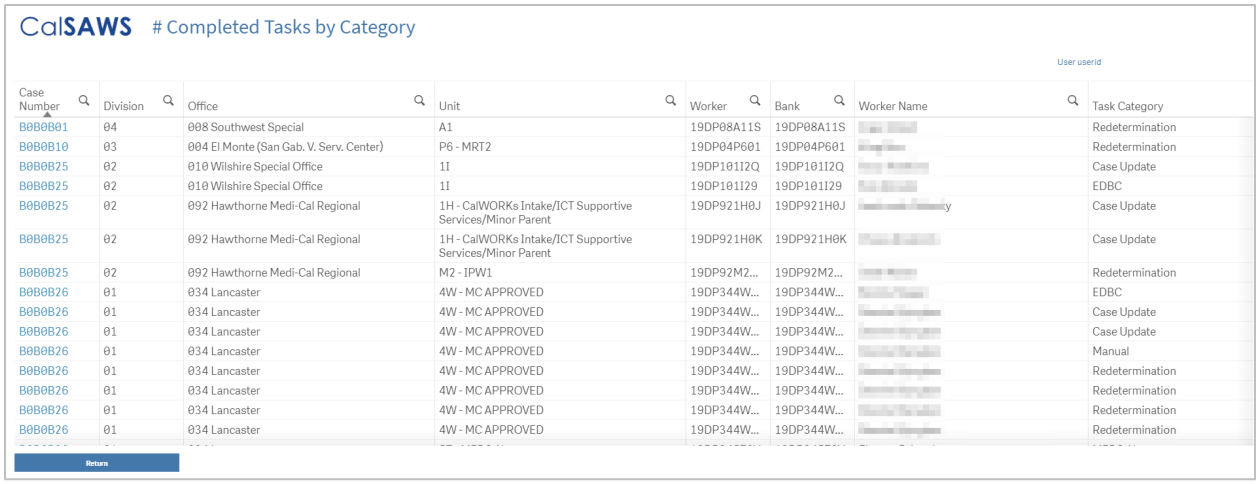


Figure 6.1.5 – Task Management Dashboard Mockup – # Completed Tasks by Category (Historical Task Management) Sheet

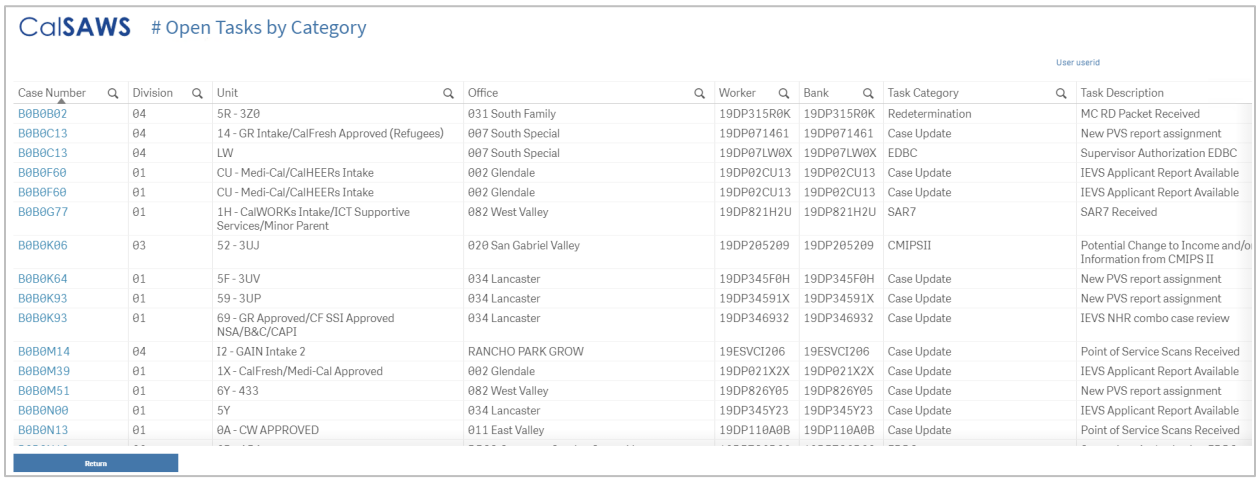


Figure 6.1.6 – Task Management Dashboard Mockup - # Open Tasks by Category (Report 387) Sheet

Note: This is the updated sheet title as per the recommendations described in this SCR.

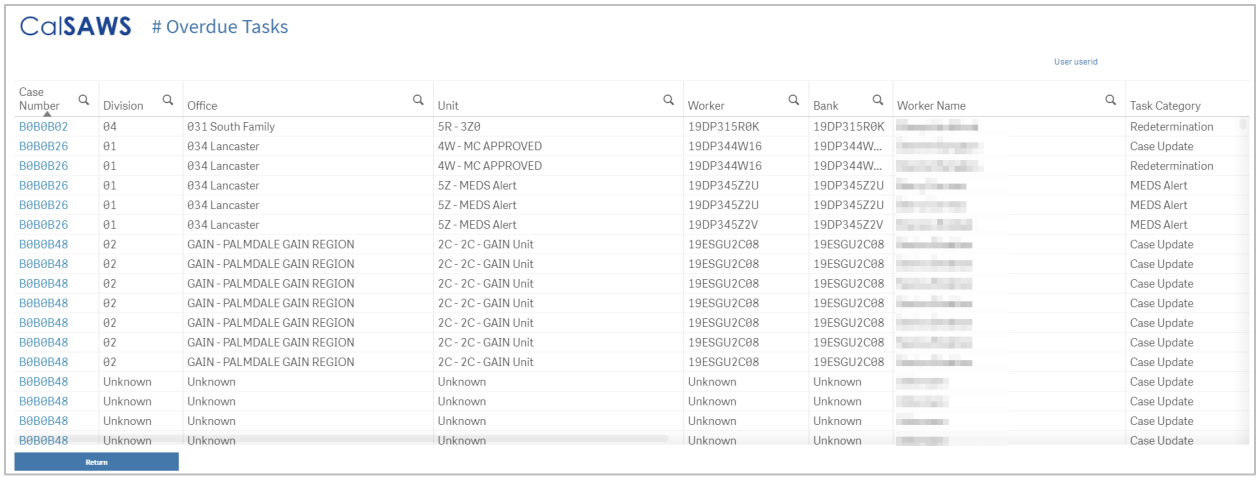


Figure 6.1.7 – Task Management Dashboard Mockup - # Overdue Tasks (Report 386) Sheet

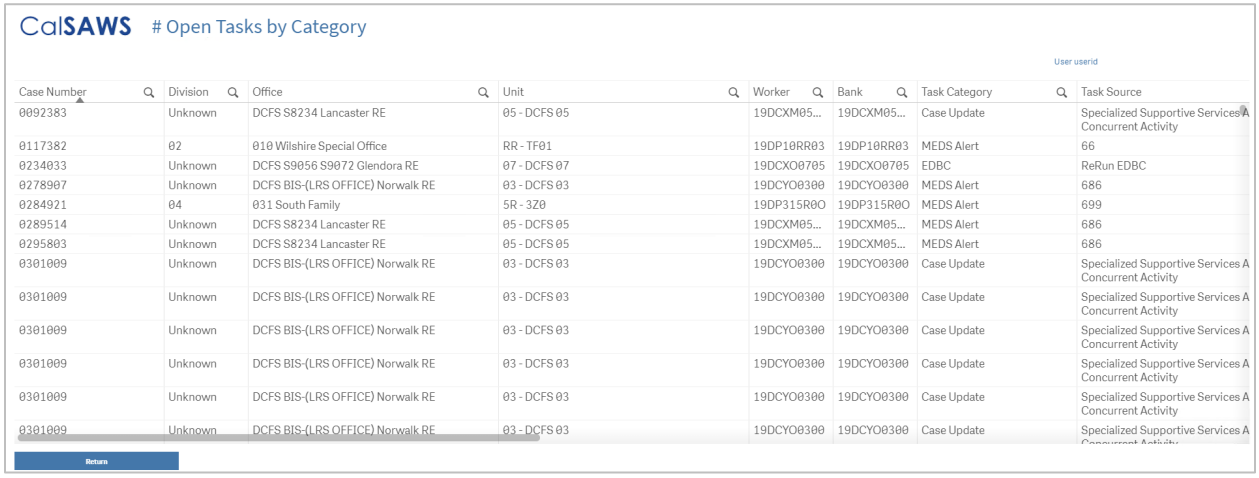


Figure 6.1.8 – Task Management Dashboard Mockup - # Open Tasks by Category (Report 301) Sheet

Note: This is the updated sheet title as per the recommendations described in this SCR.

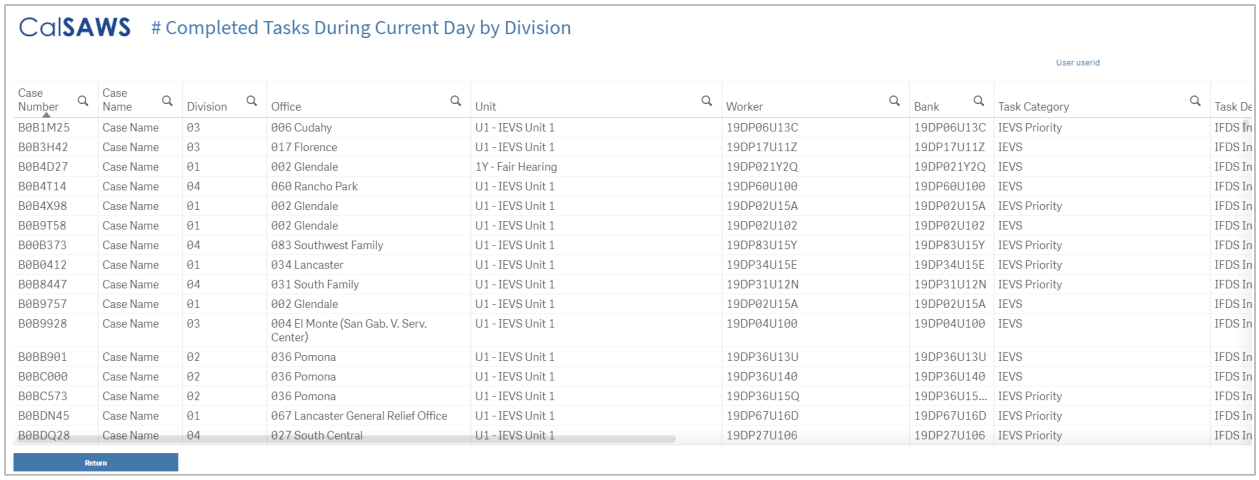


Figure 6.1.9 – Task Management Dashboard Mockup - # Completed Tasks During Current Day by Division (Report 304) Sheet

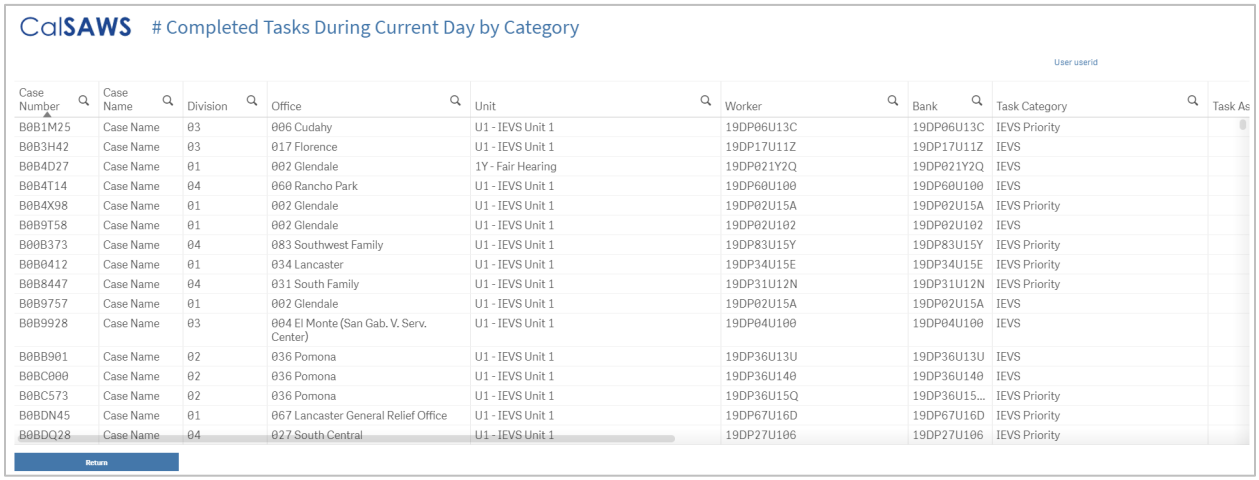


Figure 6.1.10 – Task Management Dashboard Mockup - # Completed Tasks During Current Day by Category (Report 303) Sheet

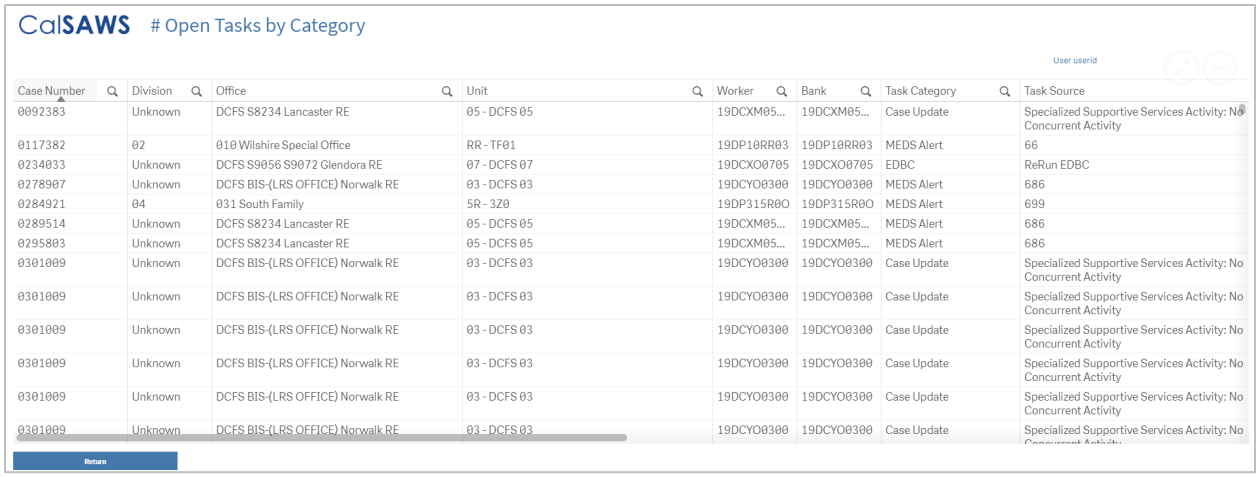


Figure 6.1.11 – Task Management Dashboard Mockup - # Open Tasks by Category (Report 383) Sheet

Note: This is the updated sheet title as per the recommendations described in this SCR.

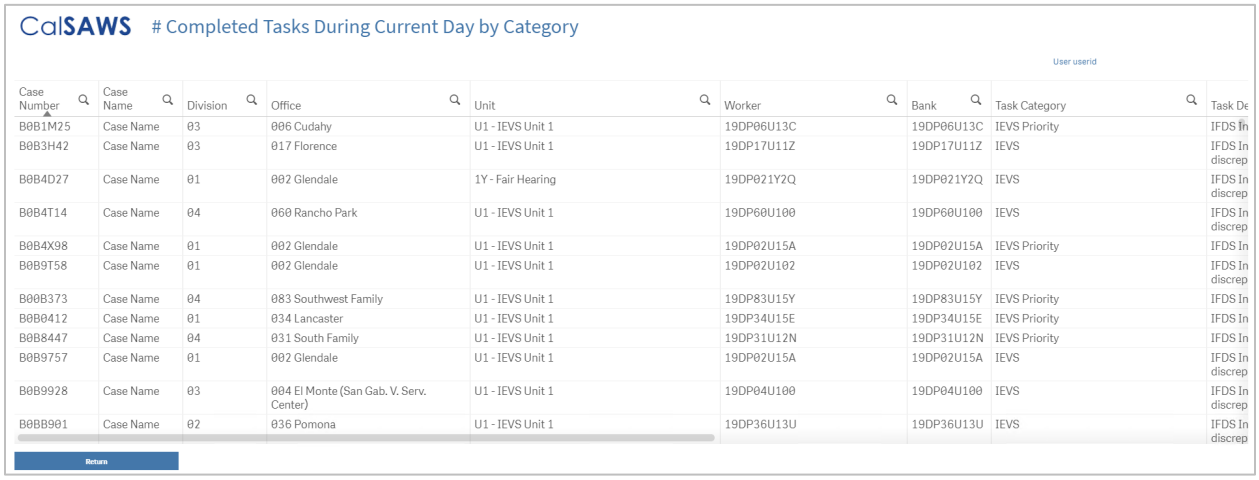


Figure 6.1.12 – Task Management Dashboard Mockup - # Completed Tasks During Current Day by Category (Report 382) Sheet

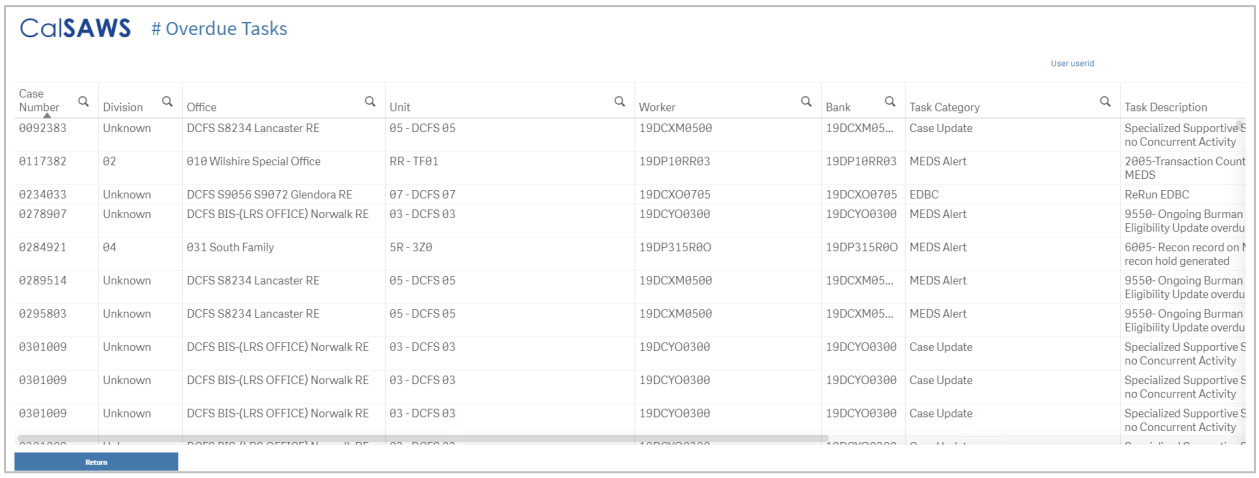


Figure 6.1.13 – Task Management Dashboard Mockup - # Overdue Tasks (Report 381) Sheet

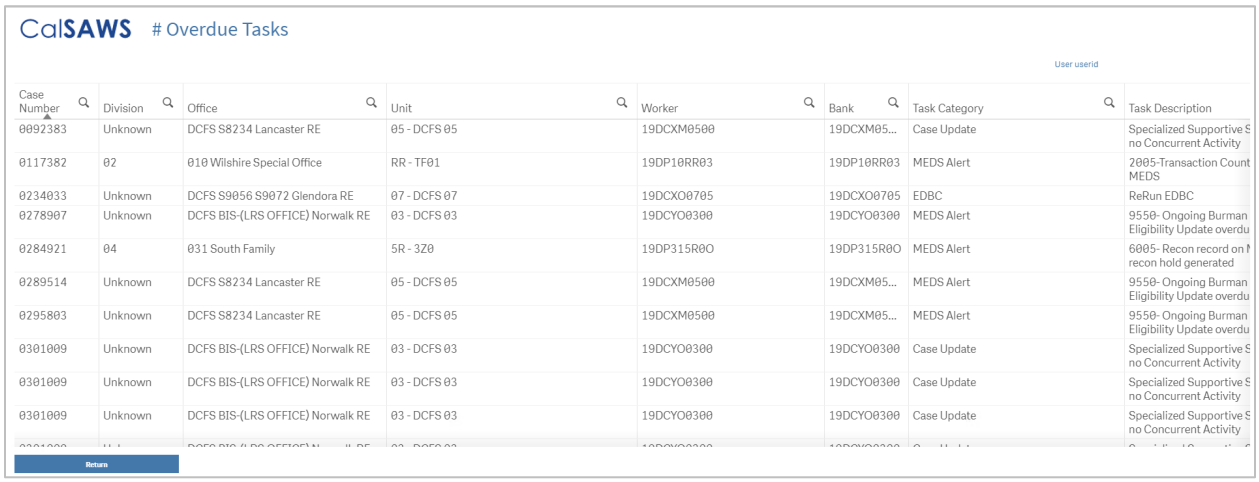


Figure 6.1.14 – Task Management Dashboard Mockup - # Overdue Tasks (Report 305) Sheet

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218759 | Update NA 820 and NA 821 with updates from CDSS

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Raj Devidi
	Reviewed By	Pramukh Karla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/09/2021	1.0	Initial Revision	Raj Devidi

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Table of Contents

1 Overview 4
1.1 Current Design 4
1.2 Requests 4
1.3 Overview of Recommendations 4
1.4 Assumptions 4
2 Recommendations 4
2.1 Update NA 820 (11/20) – Approval of Transportation 4
2.1.1 Overview 4
2.1.2 Description of Change 5
2.2 Update NA 821 (11/20) – Welfare To Work/Cal-Learn Transportation Discontinue 8
2.2.1 Overview 8
2.2.2 Description of Change 9
3 Supporting Documents 10
4 Requirements 11
4.1 Migration Requirements 11

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1 OVERVIEW

The purpose of this change is to update NA 820 (01/01) - Approval of Transportation and NA 821 (01/01) - Welfare To Work/Cal-Learn Transportation Discontinue forms with latest versions of NA 820 (11/20) and NA 821 (11/20) forms respectively in CalSAWS.

1.1 Current Design

The form NA 820 (01/01) - Approval of Transportation is available in English and Spanish in LRS/CalSAWS. The form NA 821 (01/01) - Welfare To Work/Cal-Learn Transportation Discontinue is available in English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog and Vietnamese languages in LRS/CalSAWS.

1.2 Requests

The form NA 820 (11/20) - Approval of Transportation will be available in English and Spanish languages. The form NA 821 (11/02) - Welfare To Work/Cal-Learn Transportation Discontinue will be available in English and Spanish languages.

1. Update the NA 820 and NA 821 forms based on latest direction from CDSS.
2. All fields should be editable when generated from the Template Repository.
3. Update variable pre-population for Spanish to populate in Spanish for the NA 820.

1.3 Overview of Recommendations

Update NA 820 (01/01) - Approval of Transportation and NA 821 (01/01) - Welfare To Work/Cal-Learn Transportation Discontinue with latest versions.

1.4 Assumptions

1. Page numbers will be added on the form.
2. All form fields are editable unless specified.
3. No changes to the existing triggers.
4. Spanish variable populations added as part of SCR CA-212411.
5. Existing one page NA back 9 (04/2013) is used on these forms.

2 RECOMMENDATIONS

2.1 Update NA 820 (11/20) – Approval of Transportation

2.1.1 Overview

The form NA 820 (01/01) - Approval of Transportation is available in CalSAWS. Update this form with latest version NA 820 (11/20) - Approval of Transportation.

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Add the latest version of the form in English and Spanish languages to LRS/CalSAWS.

Form: NA 820 (11/20)
Programs: Cal-Learn, REP, Welfare to Work
Attached Forms: N/A
Forms Category: NOA
Languages: English and Spanish.
Template Repository Visibility: All 58 counties

2.1.2 Description of Change

1. Update NA 820 (01/01) – Approval of Transportation form with latest version in English and Spanish languages to the LRS/CalSAWS Software.

   Form Header: LRS/CalSAWS State Standard Header
   Form Title/Name: Approval of Transportation
   Form Description: This form is used to notify a Customer that they have been approved for transportation. The Customers hearing rights are also listed.
   Form Number: NA 820
   Include NA Back 9: Yes
   Imaging Form Name: Approval of Transportation
   Imaging Document Type: Notification/NOA
   Form Mockups: Please refer to Section 3.0 – Supporting Document #1.

2. Populate fields as below when NA 820 (11/20) form is generated from Template Repository.

   a. Header fields population

Field	Description
Section: Header (CalSAWS Standard Header), Page 1	
Worker Name	Name of Worker who is assigned to the Program
Worker ID	ID of Worker who is assigned to the Program
Worker Phone Number	Phone Number of Worker who is assigned to the Program
Case Name	Case Name on the Case
Date	Date on which NA 820 (11/20) form generated

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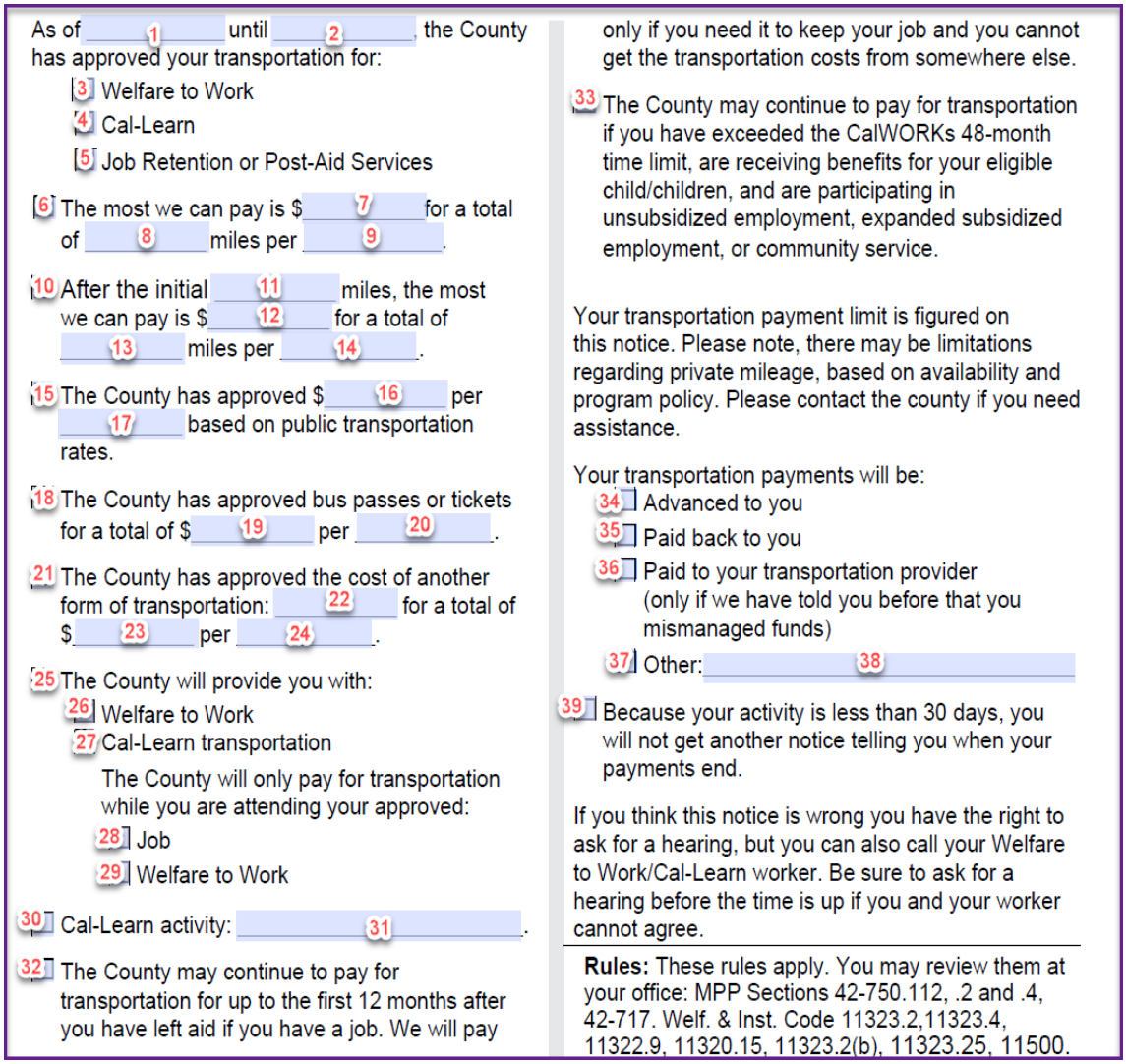
Field	Description
Customer ID	Customer Id of the Participant
Case Number	Case Number on the Case

3. Form body variable population.

   Refer to Supporting Documents #2 for variable population.



As of 1 until 2, the County has approved your transportation for:

3 Welfare to Work
4 Cal-Learn
5 Job Retention or Post-Aid Services

6 The most we can pay is $7 for a total of 8 miles per 9.

10 After the initial 11 miles, the most we can pay is $12 for a total of 13 miles per 14.

15 The County has approved $16 per 17 based on public transportation rates.

18 The County has approved bus passes or tickets for a total of $19 per 20.

21 The County has approved the cost of another form of transportation: 22 for a total of $23 per 24.

25 The County will provide you with:
26 Welfare to Work
27 Cal-Learn transportation

The County will only pay for transportation while you are attending your approved:
28 Job
29 Welfare to Work

30 Cal-Learn activity: 31.

32 The County may continue to pay for transportation for up to the first 12 months after you have left aid if you have a job. We will pay only if you need it to keep your job and you cannot get the transportation costs from somewhere else.

33 The County may continue to pay for transportation if you have exceeded the CalWORKs 48-month time limit, are receiving benefits for your eligible child/children, and are participating in unsubsidized employment, expanded subsidized employment, or community service.

Your transportation payment limit is figured on this notice. Please note, there may be limitations regarding private mileage, based on availability and program policy. Please contact the county if you need assistance.

Your transportation payments will be:
34 Advanced to you
35 Paid back to you
36 Paid to your transportation provider (only if we have told you before that you mismanaged funds)
37 Other: 38

39 Because your activity is less than 30 days, you will not get another notice telling you when your payments end.

If you think this notice is wrong you have the right to ask for a hearing, but you can also call your Welfare to Work/Cal-Learn worker. Be sure to ask for a hearing before the time is up if you and your worker cannot agree.

Rules: These rules apply. You may review them at your office: MPP Sections 42-750.112, .2 and .4, 42-717. Welf. & Inst. Code 11323.2,11323.4, 11322.9, 11320.15, 11323.2(b), 11323.25, 11500.

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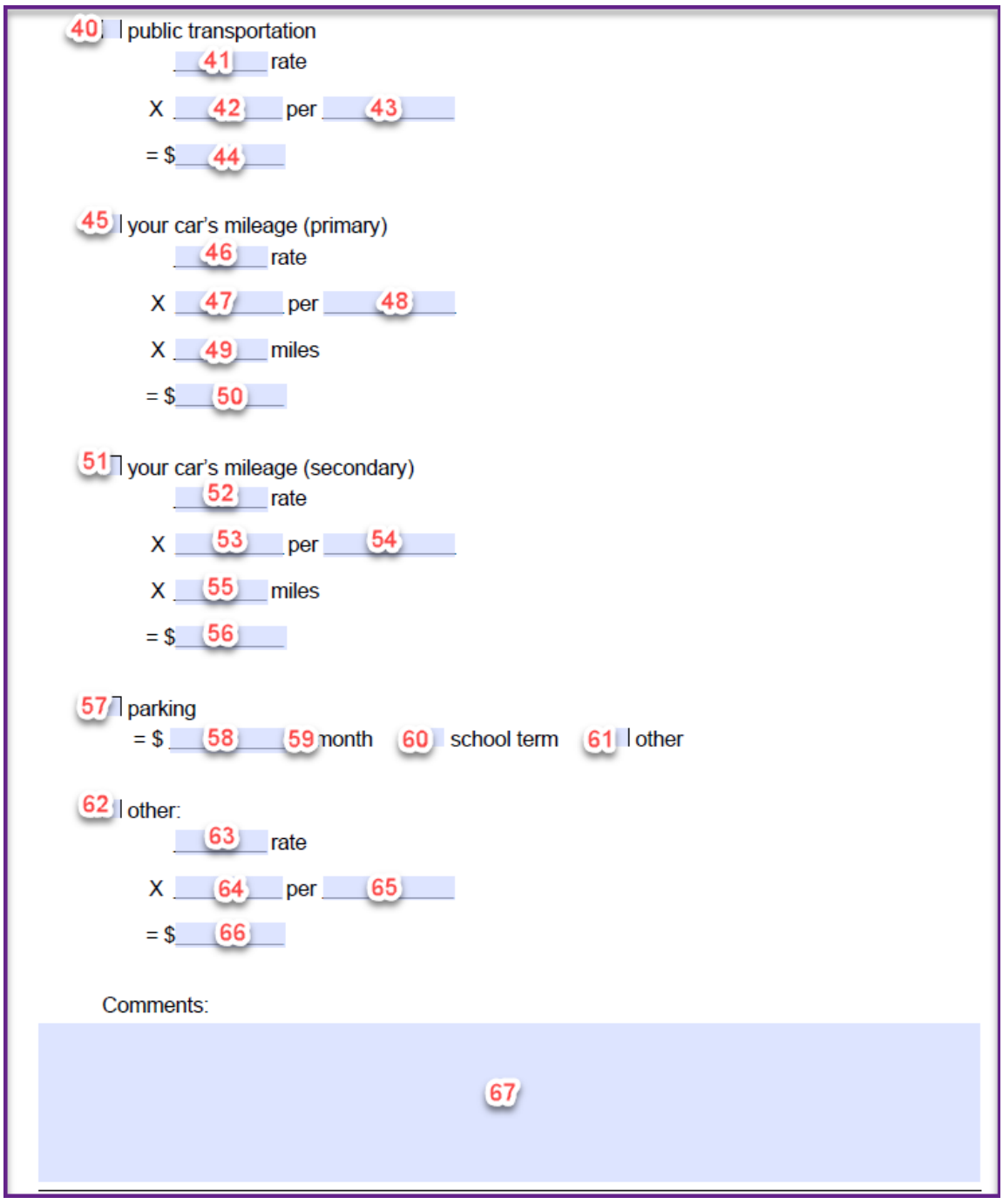

4. Footer requirements

   Follow the mockups.

5. Agency name requirements

   Follow the mockups.

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6. Add the following barcode options to the NA 820 (11/20) form

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

7. Add the following print options to the NA 820 (11/20) Form:

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

Mailing Requirements: No change to the mailing requirements.
Mail-To (Recipient): Person selected on the Document parameter page or person approved with payment request.
Mailed From (Return): Program Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements: No changes to the below requirements.
Special Paper Stock: N/A
Enclosures: Yes
Clock Indicator: N
Electronic Signature: N/A
Post to SSP: Yes

2.2 Update NA 821 (11/20) – Welfare To Work/Cal-Learn Transportation Discontinue

2.2.1 Overview

The form NA 821 (01/01) - Welfare To Work/Cal-Learn Transportation Discontinue is available in CalSAWS. Update this form with latest version NA 821 (11/20) - Welfare To Work/Cal-Learn Transportation Discontinue. Add latest version of the form in English and Spanish languages to LRS/CalSAWS.

Form: NA 821 (11/20)
Programs: Cal-Learn, REP, Welfare to Work
Attached Forms: N/A
Forms Category: NOA
Languages: English and Spanish.
Template Repository Visibility: All 58 counties

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2.2.2 Description of Change

1. Update NA 821 (01/01) – Welfare To Work/Cal-Learn Transportation Discontinue form with latest version in English and Spanish languages to the LRS/CalSAWS Software.

   Form Header: LRS/CalSAWS State Standard Header
   Form Title/Name: Welfare To Work/Cal-Learn Transportation Discontinue
   Form Description: This is a NOA informing the participant that they have been denied transportation funds or will have their transportation discontinued for the given programs: WTW and Cal-Learn at the given effective date.
   Form Number: NA 821
   Include NA Back 9: Yes
   Imaging Form Name: WTW/Cal-Learn Transportation Discontinue
   Imaging Document Type: Notification/NOA
   Form Mockups: Please refer to Section 3.0 – Supporting Document #1.

2. Populate fields as below when NA 821 (11/20) form is generated from Template Repository.

   a. Header fields population

Field	Description
Section: Header (CalSAWS Standard Header), Page 1	
Worker Name	Name of Worker who is assigned to the Program
Worker ID	ID of Worker who is assigned to the Program
Worker Phone Number	Phone Number of Worker who is assigned to the Program
Case Name	Case Name on the Case
Date	Date on which NA 821 (11/20) form generated
Customer ID	Customer Id of the Participant
Case Number	Case Number on the Case

3. No changes to the existing form body variable population.

4. Footer requirements

   Follow the mockups.

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5. Agency name requirements

   Follow the mockups.

6. Add the following barcode options to the NA 821 (11/20) form

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

7. Add the following print options to the NA 821 (11/20) Form:

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

Mailing Requirements: No change to the mailing requirements.
Mail-To (Recipient): Person selected on the Document parameter page or person approved with payment request.
Mailed From (Return): Program Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements: No changes to the below requirements.
Special Paper Stock: N/A
Enclosures: Yes
Clock Indicator: N
Electronic Signature: N/A
Post to SSP: Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	NA 820 (11/20) and NA 821 (11/20) Forms	NA820_EN.pdf NA820_SP.pdf NA821_EN.pdf NA821_SP.pdf
2	Client Correspondence	NA 820 variable population	NA 820 population details.docx

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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	Update the NA 820 and NA 821 forms based on latest direction from CDSS. All fields should be editable when generated from the Template Repository or Generate Form button on the Service Arrangement Detail page. Update variable pre-population for Spanish to populate in Spanish for the NA 820	1. Estimate is for updating the form in English and Spanish along with updating the batch and online triggers. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	SCR CA-218759 updates NA 820 (11/20) and NA 821 (11/20) Forms and implement in English and Spanish languages.

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-223936

DDID 1629

Task Management

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/9/2021	1.0	Initial Revision	Justin Dobbs

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Table of Contents

1 Overview 4
1.1 Current Design 4
1.2 Requests 4
1.3 Overview of Recommendations 4
1.4 Assumptions 4
2 Recommendations 5
2.1 Update CSC Category Task Types to be Read Only 5
2.1.1 Overview 5
2.1.2 Description of Changes 5
3 Supporting Documents 6
4 Requirements 7
4.1 Migration Requirements 7
5 Migration Impacts 8
6 Outreach 9
7 Appendix 10
7.1 CSC Category Task Types 10

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1 OVERVIEW

This design outlines modifications to a population of CSC Task Types to be read only.

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.

DDID 1629 has been phasing CalSAWS automated tasks into the Automated Action framework. A population of Task Types are considered System Tasks, which are tied to specific processing in the CalSAWS System. CSC Category Task Types are considered System Tasks.

1.2 Requests

Update Task Types with a Category of CSC to be read only as they are considered system tasks. The intent of configurability restriction is to prevent any disruption to existing processing logic for these specific Tasks.

1.3 Overview of Recommendations

Update non-custom CSC Category Task Types to be read only.

1.4 Assumptions

1. Task Types with a Category of CSC are specific to Los Angeles county and are invoked through the Los Angeles county call center solution.
2. New custom Task Types with a Category of CSC that are created by county users will be treated as custom Task Types and will not be read only. There is no automated processing tied to these Task Types.

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2 RECOMMENDATIONS

This section will outline recommendations to adjust the CSC Task Types to be read only as they are considered CalSAWS System task types.

2.1 Update CSC Category Task Types to be Read Only

2.1.1 Overview

Task Types with a Category of CSC are considered CalSAWS System task types. This section describes updates to make these Task Types read only to not disrupt processing logic specific to these Task Types.

2.1.2 Description of Changes

1. Update existing CSC Category Task Types

   Update CSC Category non-custom Task Types to be read only. Logic specific to CSC Category Task Types is imbedded within the logic of the CalSAWS System requiring the Task Types to not be configurable.

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

   Note: The CSC Category Task Types in Appendix 7.1 are specific to Los Angeles county.

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3 SUPPORTING DOCUMENTS

N/A

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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1629	The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.	- Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county. - Support for mapping CalWIN automated tasks to LRS automated tasks is not included. - Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 – Attachment 1 Contractor Assumptions Inventory List, worksheet 'LRS Automated Tasks'	The CSC Category Task Types referenced in the Appendix are considered System Tasks and do not require an Automated Action. This design will make the Task Types read only to support CalSAWS System processing.

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5 MIGRATION IMPACTS

N/A

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6 OUTREACH

N/A

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7 APPENDIX

7.1 CSC Category Task Types

- ABAWD
- Add Individual
- Alternate Card Holder
- Case Status
- Documentation - Provided to District Office by PT.
- Domestic Violence
- Earned Income
- Edit Individual
- Employee Recipient
- Fleeing Felon
- Immigration Status
- Marital Status
- Medical Renewal - Change
- Mental Health Appt. Request
- Minor Consent
- Missed 2nd Recertification Appt
- Other CSC Task
- Other Sensitive Services
- Periodic Reports
- Property
- Pt. Requesting New/Cancel Direct Deposit
- Remove Individual
- Rent
- Returning Workers Call
- Sanctions
- Time Limits
- Unearned Income
- Utilities
- Workfare Project
- eICT

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-224045

Income Type Code (CT186) Updates for C-IV Migration

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	S Meenavalli, M Barillas
	Reviewed By	Ritu Ch, Jason F, Binh, Caroline, Sarah, Laura, Ignacio

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/01/2021	1.0	Initial Version	S Meenavalli
03/09/2021	2.0	Cosmetic updates to section 2.2.2	M Barillas

Table of Contents

1 Overview 4
1.1. Current Design 4
1.2. Requests 4
1.3. Overview of Recommendations 4
1.4. Assumptions 4
2 Recommendations 4
2.1. Update Income Type Code (CT186) – EDBC 4
2.1.1 Overview 4
2.1.2 Description of Changes 4
2.1.3 Programs Impacted 5
2.1.4 Performance Impacts 5
2.2. Batch CTCR Update CT186 Mapping 6
2.2.1 Overview 6
2.2.2 Description of Change 6
2.2.3 Estimated Number of Records Impacted/Performance 6
3 Requirements 7
3.1. Project Requirements 7

1 OVERVIEW

1.1. Current Design

Currently in CalSAWS, specific Income Types are not aligned as per the state and federal regulations and these are being not being evaluated correctly in the budget calculations when compared with the CIV Income Types classifications. This SCR is to align the Income Types in CalSAWS as per the regulations.

1.2. Requests

Align the income types associated to the corresponding program classification in CalSAWS Code Detail Table.

1.3. Overview of Recommendations

1. Update the Code Detail Table CT186 (Income Type) for the CW, CF, FC and MC Programs classifications in CalSAWS.

1.4. Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. Converted data available will be handled by a separate effort.
3. Converted records will be indicated when they are transferred to LRS/CalSAWS during the conversion process.
4. The CalSAWS impacted Programs / Case listing is addressed in the SCR **CA-226091** – Listing of Active CW/CF/MC/FC Cases for Income Types.

2 RECOMMENDATIONS

2.1. Update Income Type Code (CT186) – EDBC

2.1.1 Overview

The rows for the CT186 need to be end dated and insert new rows effective 06/01/2021 of the CIV Migration Conversion Date in CalSAWS.

2.1.2 Description of Changes

1. For CW/CF Programs:
    a. Update the below Income Types for the CW/CF Classifications in LRS/CalSAWS by end-dating the existing code table records with an end date of 05/31/2021. Insert new code table records effective 06/01/2021 with the below details:

CODE_NUM_IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	REFER_TABLE_3_DESCR CWClassification	REFER_TABLE_6_DESCR FSClassification
06	186	Cash Gift/Inheritance	Unearned	Unearned
48	186	Life or Burial Insurance	Unearned	Unearned

2. For FC Program:
    a. Update the below Income Types for the FC Classification in LRS/CalSAWS by end-dating the existing code table records with an end date of 05/31/2021. Insert new code table records effective 06/01/2021 with the below details:

CODE_NUM_IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	REFER_TABLE_10_DESCR FCClassification
12	186	Child Support – Direct	Unearned
13	186	Child Support – Excess	Unearned
15	186	Spousal Support – Direct	Unearned
48	186	Life or Burial Insurance	Unearned
B4	186	Child Support - Through LCSA	Unearned
B5	186	Child & Spousal Support - Through LCSA	Unearned
B6	186	Spousal Support - Through LCSA	Unearned

3. For MC Program:
    a. Update the below Income Types for the MC Classification in LRS/CalSAWS by end-dating the existing code table records with an end date of 05/31/2021. Insert new code table records effective 06/01/2021 with the below details:

CODE_NUM_IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	REFER_TABLE_5_DESCR MCClassification
11	186	Contribution - UAM In CF HH	Exempt
A7	186	Contribution - UAM Not In CF HH	Exempt

2.1.3 Programs Impacted

CW/CF/FC/MC

2.1.4 Performance Impacts

None

2.2. Batch CTCR Update CT186 Mapping

2.2.1 Overview

CT186 (Income Type Code) in CalSAWS/C-IV is used to evaluate the EDBC Income calculation for respective programs. This data allows CW/CF/FC/MC and other programs to determine the income to be evaluated as earned/unearned/exempt.

Modify CT186 'Cancelled Debts', 'Farming or Fishing income', 'Interest income (taxable and non-taxable) 1099-INT', 'Ordinary/qualified dividends 1099-DIV', ICT outbound mapping to match C-IV's ICT outbound mapping.

2.2.2 Description of Change

1. Create a CTCR to update the outbound mappings of the following income type codes (CT186):

Income Type	Code Num Identif	Current Mapping	New Mapping
Cancelled Debts	D7	N	Other – 'LOT'
Farming or Fishing income	FF	N	Employment – '4EM'
Interest income (taxable and non-taxable) 1099-INT	IN	N	Interest Income – '41J'
Ordinary/qualified dividends 1099-DIV	OQ	N	1099 – 'LTN'

2.2.3 Estimated Number of Records Impacted/Performance

N/A

3 REQUIREMENTS

3.1. Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.2	The LRS shall be able to retroactively perform ED/BC on a case or an individual for any time period for which data is converted to or entered into the LRS.	Code Detail Table rows with differences between CIV and CalSAWS are updated such that CalSAWS will use new Income classifications.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-224584

Code Hierarchy CT202 Updates for C-IV Migration

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	S Meenavalli
	Reviewed By	Ritu Ch, Jason F, Matt, Binh, Caroline, Sarah, Elisa

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/01/2021	1.0	Initial Version	S Meenavalli
03/15/2021	1.1	Updated Design with the comments received	S Meenavalli

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Table of Contents

1 Overview 4
1.1. Current Design 4
1.2. Requests 4
1.3. Overview of Recommendations 4
1.4. Assumptions 5
2 Recommendations 5
2.1. Update Code Hierarchy of for Parent Table CT202 – Online 5
2.1.1 Overview 5
2.1.2 Description of Changes 5
2.1.3 Programs Impacted 6
2.1.4 Performance Impacts 6
2.2. Update Deemed Property rules – EDBC 6
2.2.1 Overview 6
2.2.2 Description of Changes 6
2.2.3 Programs Impacted 10
2.2.4 Performance Impacts 10
3 Requirements 11
3.1. Project Requirements 11

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1 OVERVIEW

1.1. Current Design

Currently in CalSAWS, Deemed Sponsor Income and Resource/Property are automated in EDBC budget evaluation but in C-IV, the Deemed Sponsor Property are selected by the user in the Property data collection pages. For CalSAWS, the Sponsor Income and Property are added against the Sponsor person and EDBC will evaluate in the budgeting for the Program Persons but in C-IV, the Deemed Sponsor Property are added for the Program Persons to evaluate in budget calculation.

In C-IV, the rows for the Parent Table CT 202 - Property Category Code (Liquid, Motor Vehicle, Personal, Real) and Child Table CT208 - Property Type Code (Deemed Sponsor - CalFresh, Deemed Sponsor - CalWORKs, Deemed Sponsor - Medi-Cal) exists but not in CalSAWS. These rows need to be inserted in CalSAWS.

1.2. Requests

Allow the workers to view the below Property Types in CalSAWS for the C-IV converted cases after migration. These Property Types should be allowed only for viewing by the workers and system should not allow to create new Property records with these types.

1. Deemed Sponsor – CalWORKs
2. Deemed Sponsor – CalFresh
3. Deemed Sponsor – Medi-Cal

The above Property Types are available under the below Property Categories in C-IV and these should be available to view in CalSAWS.

1. Liquid Property
2. Motor Vehicle
3. Real Property
4. Personal Property

Also, the request is to remove the logic in EDBC to not count the Deemed Sponsor Property records that are entered in the data collection. The workers need to follow the CalSAWS Sponsorship training/job aid instructions on how to enter the Sponsorship details, Income and/or Property.

1.3. Overview of Recommendations

1. Update the Code Hierarchy Table with the Parent Table CT202 – Property Category Code and Child Table CT208 – Property Type Code combination that are exiting in C-IV but not in CalSAWS.
2. End date the Sponsor related Code values in the CT208 – Property Type Code.
3. Update CW/CF EDBC rules/logic to not count the data collection Deemed Sponsor Property records in the CW/CF EDBC budget calculation.

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1.4. Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. Converted data available will be handled by a separate effort.
3. Converted records will be indicated when they are transferred to LRS/CalSAWS during the conversion process.
4. The C-IV impacted Programs/Case listing is addressed in the SCR **CIV-108714** – Listing of Active CW/CF/MC Cases for Deemed Sponsor Property.

2 RECOMMENDATIONS

2.1. Update Code Hierarchy of for Parent Table CT202 – Online

2.1.1 Overview

The rows for the Parent Table CT 202 - Property Category Code (Liquid, Motor Vehicle, Personal, Real) and Child Table CT208 - Property Type Code (Deemed Sponsor - CalFresh, Deemed Sponsor - CalWORKs, Deemed Sponsor - Medi-Cal) need to be inserted in CalSAWS.

2.1.2 Description of Changes

1. Insert Code Hierarchy of rows related to the Parent Table CT 202 - Property Category Code and Child Table CT208 - Property Type Code
2. End Date the Code_Detl values as 04/30/2021 for CT208 - Property Type Code related to Deemed Sponsor - CalFresh, Deemed Sponsor - CalWORKs, Deemed Sponsor - Medi-Cal (This will ensure to not available on the dropdown)

CODE_NUM_IDENTIF	SHORT_DECODE_NAME
38	Deemed Sponsor - CalWORKs
39	Deemed Sponsor – CalFresh
40	Deemed Sponsor - Medi-Cal

3. Update the lookup method on the Property List and Property Detail page to ensure that the pages will return the current or most recent short description based on the code value and category id.

Technical Note:
Insert the below records to the CODE_HIERCHY DB Table.

PARNT_ CATGRY_ID	PARNT_CAT GRY_CODE	PARNT _CODE	CHILD_CODE
202	Property Category Code	Liquid	Deemed Sponsor - CalFresh

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202	Property Category Code	Liquid	Deemed Sponsor - CalWORKs
202	Property Category Code	Liquid	Deemed Sponsor - Medi-Cal
202	Property Category Code	Motor Vehicle	Deemed Sponsor - CalFresh
202	Property Category Code	Motor Vehicle	Deemed Sponsor - CalWORKs
202	Property Category Code	Motor Vehicle	Deemed Sponsor - Medi-Cal
202	Property Category Code	Personal	Deemed Sponsor - CalFresh
202	Property Category Code	Personal	Deemed Sponsor - CalWORKs
202	Property Category Code	Personal	Deemed Sponsor - Medi-Cal
202	Property Category Code	Real	Deemed Sponsor - CalFresh
202	Property Category Code	Real	Deemed Sponsor - CalWORKs
202	Property Category Code	Real	Deemed Sponsor - Medi-Cal

2.1.3 Programs Impacted

CW/CF/MC

2.1.4 Performance Impacts

None

2.2. Update Deemed Property rules – EDBC

2.2.1 Overview

In CalSAWS, Deemed Sponsor Property data collection records are being read in the CW/CF EDBC rules and are being evaluated in the budget calculation.

2.2.2 Description of Changes

Update the EDBC rules/logic to exclude the data collection Deemed Sponsor Property records in the EDBC budget calculations for CW/CF Programs.

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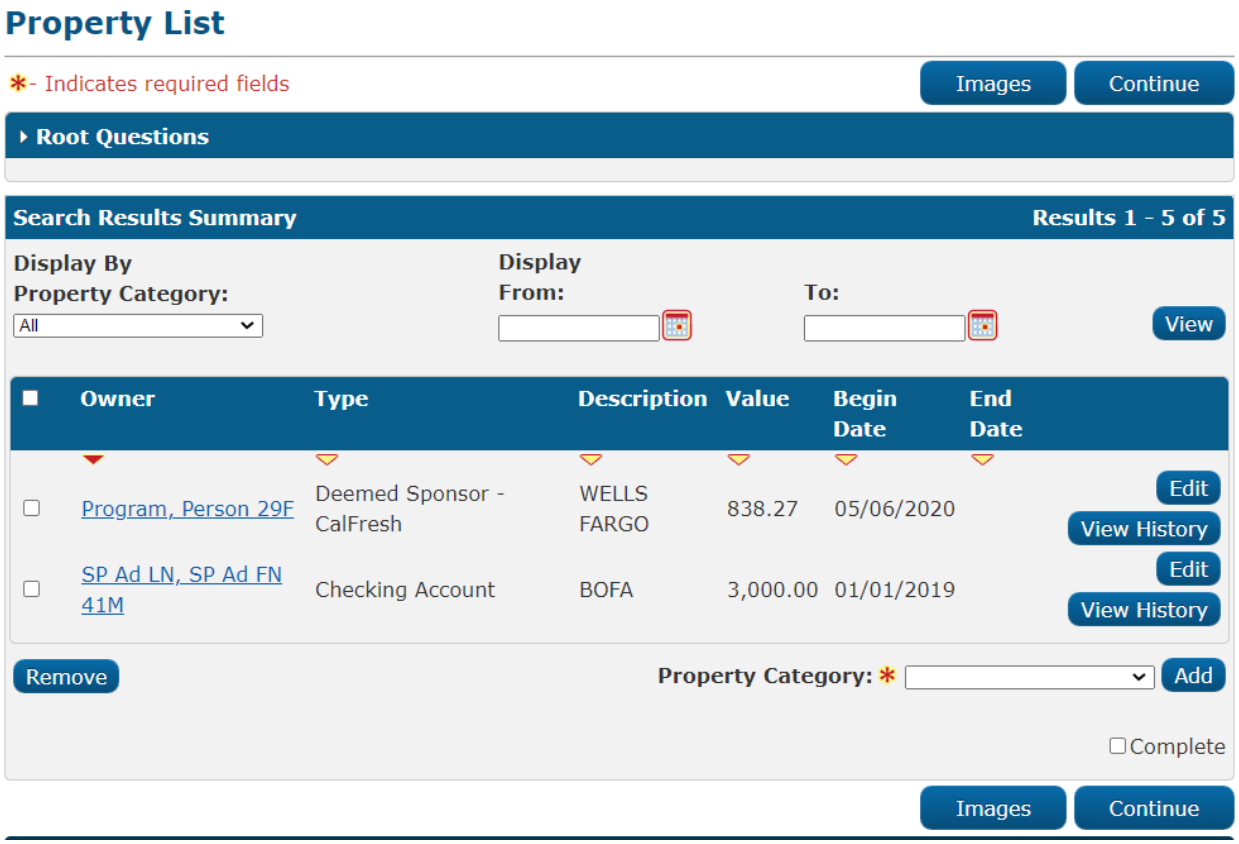
For CalFresh (CF):



2.2.2.a) Property List Page of a C-IV Converted Case with Deemed Sponsor – CalFresh and Sponsor Liquid Property

Property Eligibility	Regular	
Data Month Property:	$	1,919.14
Benefit Month Property:	$	1,919.14
Property Limit:	$	2,250.00
Result:		Waived

2.2.2.b) Property Eligibility Block on the EDBC Summary before changes

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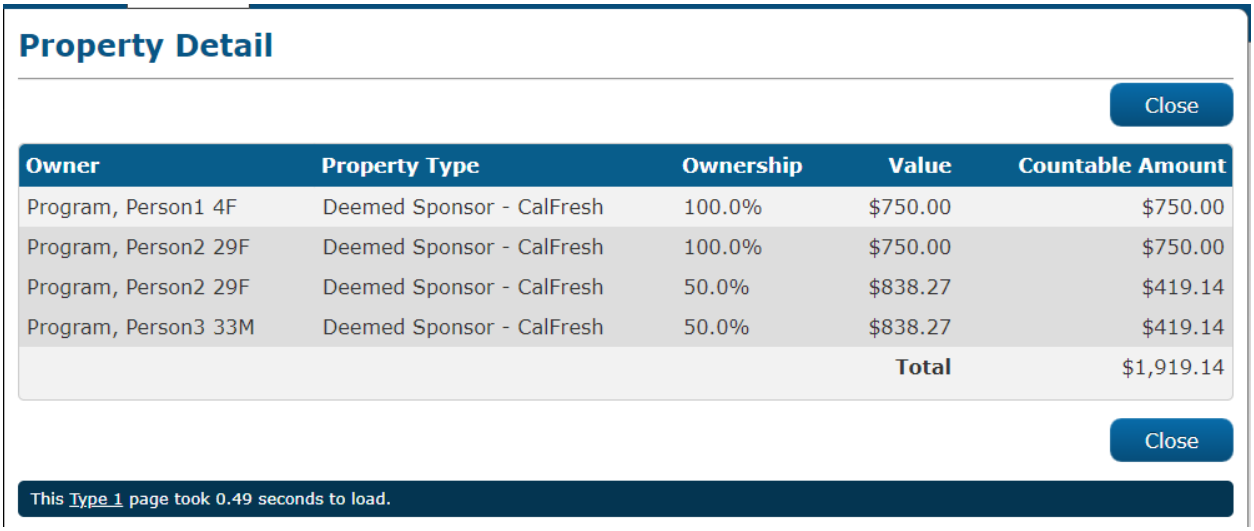


Property Detail

Close

Owner	Property Type	Ownership	Value	Countable Amount
Program, Person1 4F	Deemed Sponsor - CalFresh	100.0%	$750.00	$750.00
Program, Person2 29F	Deemed Sponsor - CalFresh	100.0%	$750.00	$750.00
Program, Person2 29F	Deemed Sponsor - CalFresh	50.0%	$838.27	$419.14
Program, Person3 33M	Deemed Sponsor - CalFresh	50.0%	$838.27	$419.14
			Total	$1,919.14

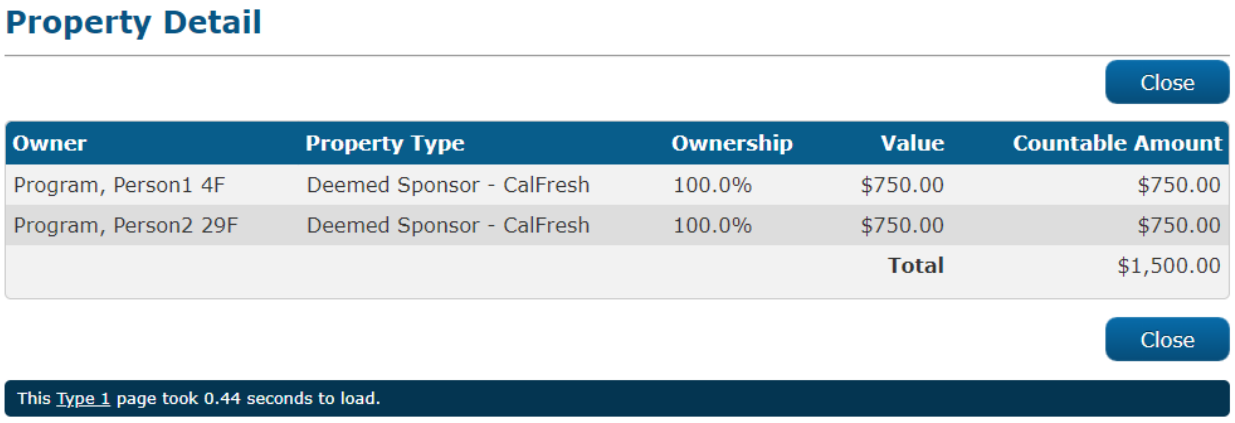
Close

This Type 1 page took 0.49 seconds to load.

2.2.2.c) Data / Benefit Month Property Detail Page before changes

Property Eligibility	Regular	
Data Month Property:	$	1,500.00
Benefit Month Property:	$	1,500.00
Property Limit:	$	2,250.00
Result:		Waived

2.2.2.d) Property Eligibility Block on the EDBC Summary after changes



Property Detail

Close

Owner	Property Type	Ownership	Value	Countable Amount
Program, Person1 4F	Deemed Sponsor - CalFresh	100.0%	$750.00	$750.00
Program, Person2 29F	Deemed Sponsor - CalFresh	100.0%	$750.00	$750.00
			Total	$1,500.00

Close

This Type 1 page took 0.44 seconds to load.

2.2.2.e) Data / Benefit Month Property Detail Page after changes

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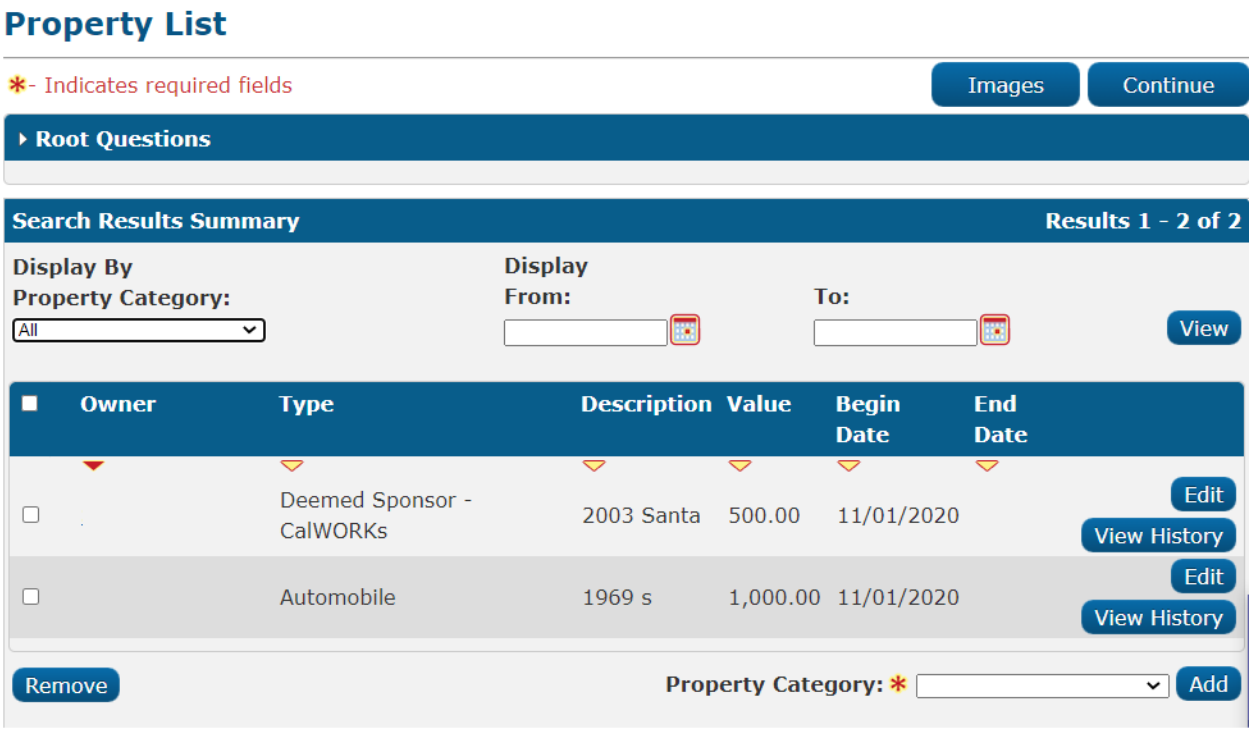
For CalWORKs (CW):



2.2.2.f) Property List Page of a C-IV Converted Case with Deemed Sponsor - CalWORKs

Property Eligibility	Regular	
Data Month Property:	$	500.00
Benefit Month Property:	$	500.00
Property Limit:	$	10,000.00
Result:		Auto-Pass

2.2.2.g) Data / Benefit Month Property Detail Page before changes

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Property Detail

Close

Owner	Property Type	Ownership	Value	Countable Amount
	Automobile	100.0%	$1,000.00	$0.00
	Deemed Sponsor - CalWORKs	100.0%	$500.00	$500.00
			Total	$500.00

Close

2.2.2.h) Data / Benefit Month Property Detail Page before changes

Property Eligibility	Regular	
Data Month Property:	$	0.00
Benefit Month Property:	$	0.00
Property Limit:	$	10,000.00
Result:		Auto-Pass

2.2.2.i) Data / Benefit Month Property Detail Page after changes

Property Detail

Close

Owner	Property Type	Ownership	Value	Countable Amount
	Automobile	100.0%	$1,000.00	$0.00
			Total	$0.00

Close

2.2.2.j) Data / Benefit Month Property Detail Page after changes

2.2.3 Programs Impacted

CW/CF

2.2.4 Performance Impacts

None

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3 REQUIREMENTS

3.1. Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.2	The LRS shall be able to retroactively perform ED/BC on a case or an individual for any time period for which data is converted to or entered into the LRS.	Code Hierarchy of and Deemed sponsor rules such that C-IV converted data will use CalSAWS Sponsorship automation.

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CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-225547 – Update CalSAWS Email architecture to use Email API

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Abel Lopez
	Reviewed By	Sumeet Patil, Raheem Raasikh, Bishal Acharya

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/01/2021	1.0	Initial revision	AL
04/12/2021	1.1	Added diagrams	AL
04/20/2021	1.2	Updated requirements based on B&I team feedback	AL

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Table of Contents

1 Overview 4

1.1 Current Design 4

1.2 Requests 4

1.3 Overview of Recommendations 4

1.3.1 Update Email architecture to replace WebLogic JMS calendar queues with AmazonMQ 4

1.3.2 Update Email architecture to use CalSAWS Email API, instead of Microsoft Graph API 4

1.3.3 Update CalSAWS Email API to use Amazon Simple Email Service (SES) 4

1.3.4 Refactor Undeliverable Email Reader batch process to Amazon Simple Queue Service (SQS) listener 4

1.4 Assumptions 4

2 Recommendations 5

2.1 Overview – SAWS to Email Service 5

2.1.1 Overview – API client to Email Service (external) 7

2.1.2 Overview – API client to Email Service (internal) 8

2.2 Refactor Undeliverable Email Reader batch process to Amazon Simple Queue Service (SQS) listener 9

2.2.1 Overview 9

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1 OVERVIEW

1.1 Current Design

In CalSAWS, outbound emails are sent to the users and customers. The email architecture uses WebLogic Java Message Service (JMS) queues and Microsoft Graph API to send out emails and event invites.

1.2 Requests

Update email architecture to remove dependency on WebLogic JMS queues and Microsoft Graph API.

1.3 Overview of Recommendations

1.3.1 Update Email architecture to replace WebLogic JMS calendar queues with AmazonMQ

AmazonMQ is a fully managed service for open source message brokers

AmazonMQ integrates using industry standard APIs and protocols

1.3.2 Update Email architecture to use CalSAWS Email API, instead of Microsoft Graph API

CalSAWS Email API will abstract email implementation details within a service to allow future centralized updates

1.3.3 Update CalSAWS Email API to use Amazon Simple Email Service (SES)

1.3.4 Refactor Undeliverable Email Reader batch process to Amazon Simple Queue Service (SQS) listener

1.4 Assumptions

- CalSAWS Ancillary applications will defer email operations to CalSAWS Email API.
- SQS Listener will use First In First Out (FIFO) queues to guarantee exactly-once processing.
- For development environments using a shared email service application, metadata will be added to SES context in order to route replies to the correct SQS listener.

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2 RECOMMENDATIONS

CalSAWS Email API will be updated to support the following scenarios while removing dependency on WebLogic JMS queues and Microsoft Graph API.

2.1 Overview – SAWS to Email Service

CalSAWS Application sends Email and Event Invites to application users (see Figure 2.1.1.1 – SAWS to Email Service).

Sequence:

1. CalSAWS application asynchronously places email or event in AmazonMQ
2. Available instance on Email Service Auto Scaling Group receives request
3. Email Service leverages AWS SES to send email or event invite
4. Replies are processed by Amazon Simple Notification Service (SNS)
5. Lambda Function Processes bounced email notifications and forwards them to Amazon SQS
6. CalSAWS application processes undeliverable email events and processes them based on current Undelivered Email Batch logic

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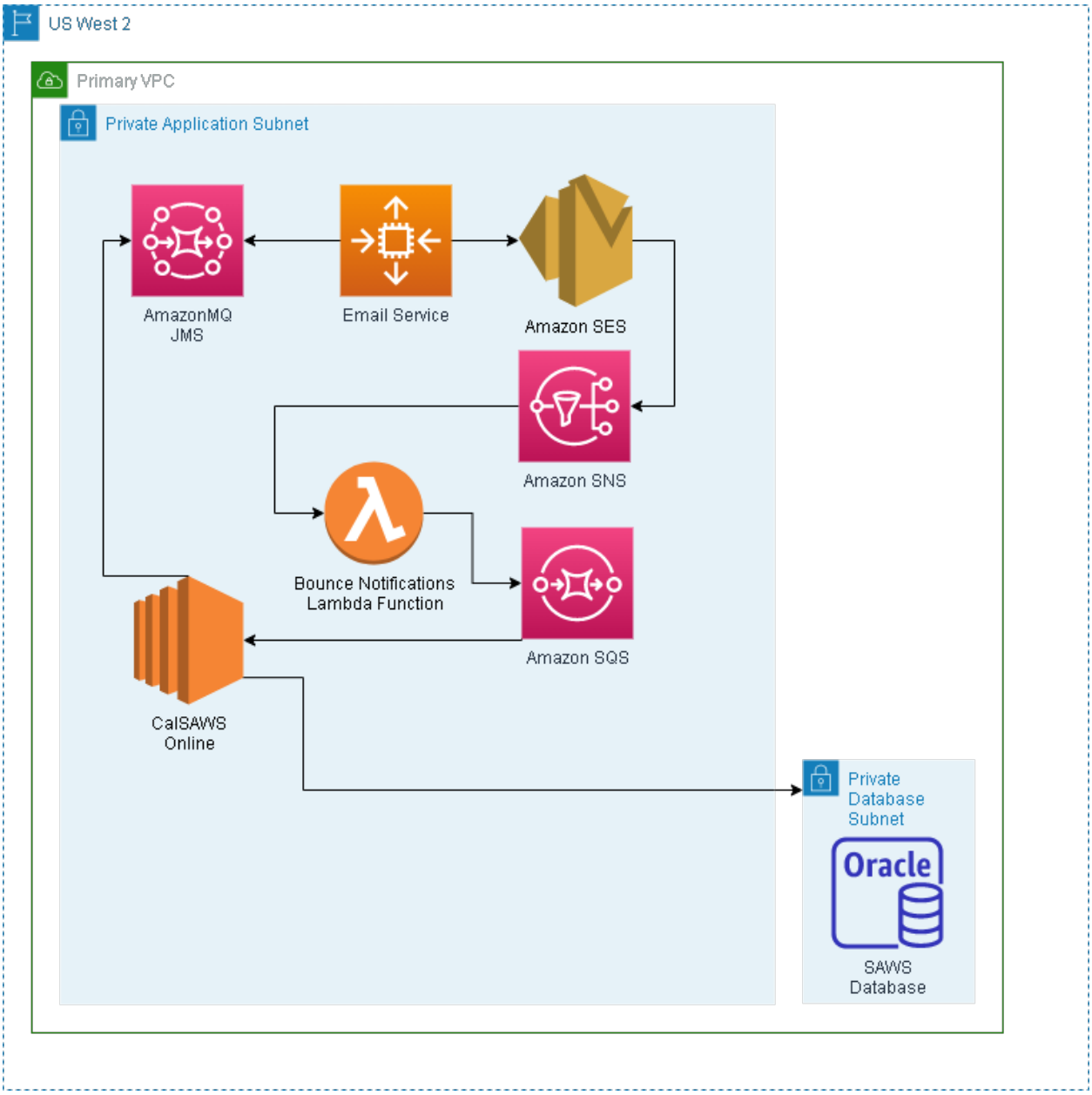

Figure 2.1.1.1 – SAWS to Email Service

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2.1.1 Overview – API client to Email Service (external)

External API clients include the Statewide Customer Portal. See Figure 2.1.2.1 – API Client to Email Service (external).

Sequence:

7. API Client obtains Bearer Token from ForgeRock
8. Request is sent to AWS API Gateway
9. API Gateway verifies Token against ForgeRock
10. Request is forwarded to Email Service Application Load Balancer
11. Request forwarded to available instance on Email Service Auto Scaling Group
12. Email Service leverages AWS SES to send email or event invite

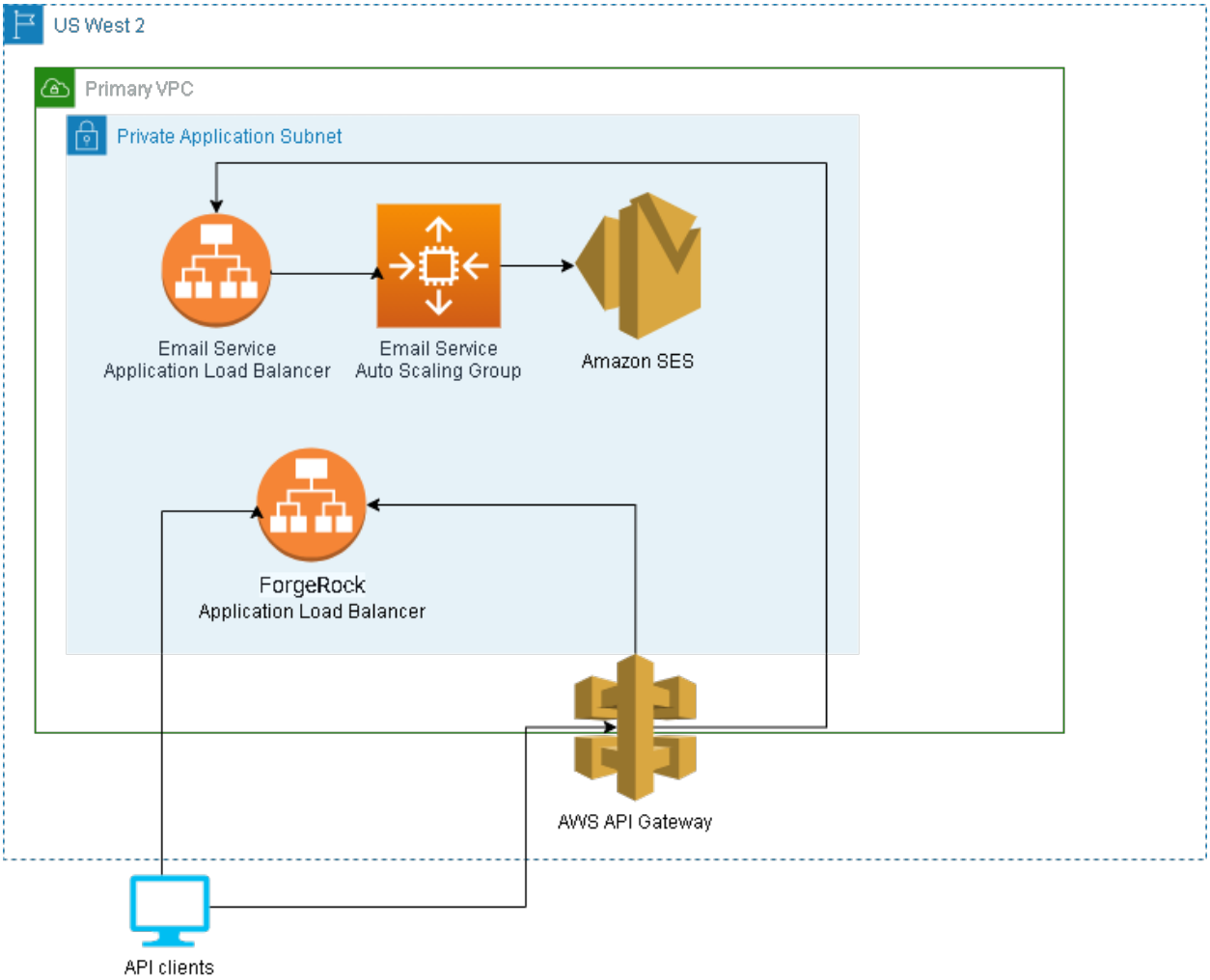

Figure 2.1.2.1 – API Client to Email Service (external)

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2.1.2 Overview – API client to Email Service (internal)

Internal API clients include Lobby Service, Contact Center, etc. See Figure 2.1.3.1 – API Client to Email Service (internal).

Sequence:

1. Internal API Client makes request to Email Service Application Load Balancer
2. Request forwarded to available instance on Email Service Auto Scaling Group
3. Email Service leverages AWS SES to send email or event invite

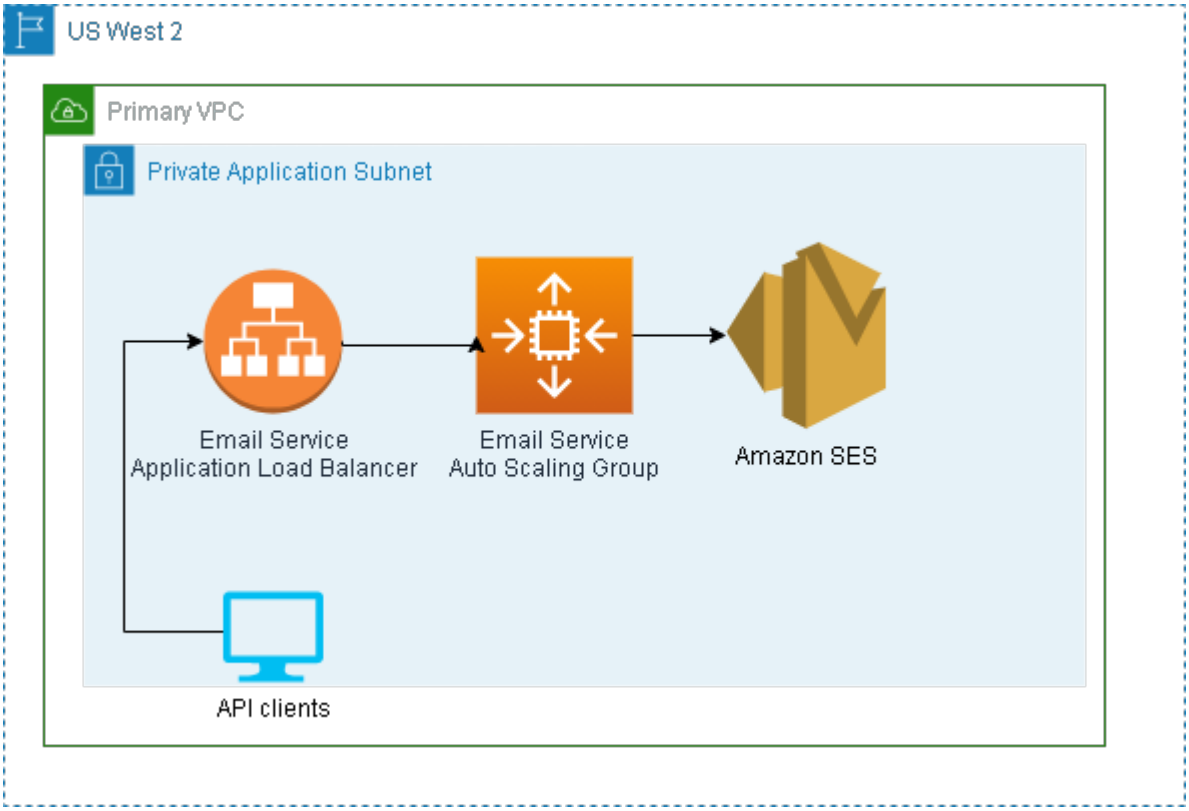

Figure 2.1.3.1 – API Client to Email Service (internal)

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2.2 Refactor Undeliverable Email Reader batch process to Amazon Simple Queue Service (SQS) listener

2.2.1 Overview

1. Move existing business logic for undeliverable email receipts to SQS event listener from Undeliverable Email Reader batch.
2. Logic will be updated to re-trigger form(s) sent in the last day (previously last batch success date).

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226343 | DDID 2630

Update IEVS PVS trigger for CSF 162

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Amy Gill, Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/23/3021	1.0	Initial Version	Jennifer Muna

Table of Contents

1 Overview 4
1.1 Current Design 4
1.2 Requests 4
1.3 Overview of Recommendations 4
1.4 Assumptions 4
2 Recommendations 5
2.1 Update IEVS PVS Interface 5
2.1.1 Overview 5
2.1.2 Description of Change 5
2.1.3 Execution Frequency 7
2.1.4 Key Scheduling Dependencies 7
2.1.5 Counties Impacted 7
2.1.6 Data Volume/Performance 7
2.1.7 Failure Procedure/Operational Instructions 7
3 Requirements 8
3.1 Migration Requirements 8

1 OVERVIEW

The Payment Verification System (PVS) Participant Contact Letter is a notice to Customers that Social Security Benefits were paid to a member on their program. Per CA-215095, the form (formerly known as PA 2492) was updated to use the CalSAWS Standard Form Numbering to CSF 162. This SCR outlines the necessary modifications to update the CSF 162 form generation for all 58 counties and to no longer generate the form for CalWORKs, CalFresh, or RCA, per instruction from CDSS.

1.1 Current Design

The Payment Verification System (PVS) Participant Contact Letter form (CSF 162) can be generated from the Template Repository. Additionally, for Los Angeles County the IEVS PVS Reader triggers the PVS Participant Contact Letter when a discrepancy exists in Unemployment Insurance (UI), Disability Insurance (DI) and Retirement, Survivors, and Disability Insurance (RSDI) income. The form is currently generated for CalWORKs, CalFresh, RCA, General Assistance/General Relief, CAPI, and Medi-Cal programs.

1.2 Requests

1. Update the IEVS PVS Reader batch trigger to not generate CSF 162 for CalWORKs, CalFresh, or RCA programs and make the form generation configurable for all 58 counties.

1.3 Overview of Recommendations

1. Update the IEVS PVS Reader batch trigger to not generate CSF 162 for CalWORKs, CalFresh, or RCA programs.
2. Create a CSF 162 batch property for the IEVS PVS Reader to trigger the form generation based on county opt-in/opt-out responses.

1.4 Assumptions

1. Per DDID 2630, CRFI responses from C-IV and CalWIN counties were received with opt-in/opt-out decisions to use the updated CSF 162 form.
2. The CSF 162 form is available in the Template Repository for all 58 counties.

2 RECOMMENDATIONS

Update the IEVS PVS interface job to not generate the PVS Participant Contact Letter (CSF 162) for CalWORKs, CalFresh, or RCA programs. Additionally, update the CSF 162 form generation based on county responses to opt-in or opt-out of updated form.

2.1 Update IEVS PVS Interface Job

2.1.1 Overview

The IEVS PVS interface is a monthly batch job that processes the interface file from the Payment Verification System, which provides information on recipients that receive or are entitled to receive Unemployment, Disability, and Retirement, Survivors, and Disability insurance. The CSF 162 form is generated when there is a discrepancy in the income on the abstract with the income reported by the participant.

2.1.2 Description of Change

1. Update the IEVS PVS Reader to not generate a CSF 162 form for CalWORKs, CalFresh, or RCA programs. The CSF 162 form will only generate for General Assistance/General Relief, CAPI, and Medi-Cal programs.
2. Create a BPCR to add a CSF 162 batch property to trigger the automatic form generation based on county responses in table below.

County	Opt-in	Opt-out
Alameda	x	
Alpine		x
Amador		x
Butte	x	
Calaveras		x
Colusa	x	
Contra Costa		x
Del Norte		x
El Dorado		x
Fresno		x
Glenn	x	
Humboldt		x
Imperial	x	
Inyo	x	
Kern		x
Kings		x
Lake	x	
Lassen	x	
Los Angeles	x	

County	Opt-in	Opt-out
Madera	x	
Marin		x
Mariposa		x
Mendocino		x
Merced	x	
Modoc		x
Mono	x	
Monterey		x
Napa		x
Nevada		x
Orange	x	
Placer	x	
Plumas		x
Riverside		x
Sacramento		x
San Benito	x	
San Bernardino		x
San Diego		x
San Francisco		x
San Joaquin		x
San Luis Obispo		x
San Mateo		x
Santa Barbara		x
Santa Clara	x	
Santa Cruz		x
Shasta	x	
Sierra	x	
Siskiyou		x
Solano		x
Sonoma	x	
Stanislaus		x
Sutter		x
Tehama	x	
Trinity	x	
Tulare		x
Tuolumne		x
Ventura	x	
Yolo		x
Yuba	x	

2.1.3 Execution Frequency

No change. This batch job runs on the 1st to the 20th of each month excluding Sundays and holidays.

2.1.4 Key Scheduling Dependencies

No change.

2.1.5 Counties Impacted

All counties.

2.1.6 Data Volume/Performance

Approximately, on average, between 500,000 and 1,500,000 abstracts will be processed monthly for all 58 counties. Note that the number of abstracts processed each month may vary.

2.1.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2630	Update the form number from "PA 2492" to CalSAWS standard naming/numbering format The CONTRACTOR shall update the batch trigger for the Payment Verification Participant contact letter and make configurable for the 58 Counties. The 58 Counties will have the option to opt in or out of the batch trigger at the time of migration.	1. Estimate is for updating the form in English and Spanish along with updating the batch trigger.	Update IEVS PVS interface to trigger the PVS Participant Contact Letter based on county opt-in/opt-out decisions.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226404 DDID 1631 Update the CA 800 ARC Report in CalSAWS

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/08/2021	1.0	Initial Release	Greg Deogracia

Table of Contents

1 Overview 4
1.1 Current Design 4
1.2 Requests 4
1.3 Overview of Recommendations 4
1.4 Assumptions 4
2 Recommendations 5
2.1 CA 800 ARC 5
2.1.1 CA 800 ARC Mockup 5
2.2 Description of Change 6
2.3 Report Location 10
2.4 Counties Impacted 10
3 Supporting Documents 11
4 Requirements 11
4.1 Project Requirements 11
5 Outreach 11
6 Appendix 11

1 OVERVIEW

For C-IV CalSAWS migration planning, SCR CA-226404 DDID 1631 was created to enable and update the CA 800 ARC report in CalSAWS. These is also a known requirement for a conversion of program codes.

1.1 Current Design

In C-IV, the Adult Relative Caregiver (ARC) is a standalone program, which means it has its own program code. In CalSAWS however, ARC is not a separate program. Instead, it is part of the Foster Care (FC) program with an ARC Aid Code.

1.2 Requests

Migrate and modify the logic of the CA 800 ARC report from C-IV to accurately report ARC program in CalSAWS.

1.3 Overview of Recommendations

1. Migrate the CA 800 ARC report from C-IV and modify the logic to accurately report ARC program in CalSAWS.

1.4 Assumptions

1. No Impact to other reports.
2. Scheduled reports will be migrated from C-IV to CalSAWS and utilize the current Excel version Workbook (*.xlsx).
3. DDID 1631 requirements limit the scope of work for this SCR to the migration of the existing report, which includes report logic and report parameters.

2 RECOMMENDATIONS

2.1 CA 800 ARC

2.1.1 CA 800 ARC Mockup

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

SUMMARY REPORT OF ASSISTANCE EXPENDITURES
CALIFORNIA WORK OPPORTUNITY AND RESPONSIBILITY TO KIDS (CalWORKs)
APPROVED RELATIVE CAREGIVER (ARC)

County	Date (Month/Year)
San Bernardino	02/2021
Claim Contact	Telephone

		CalWORKs Federal	CalWORKs State	CalWORKs State (Non-Minor Dependents)	ARC Only	ARC Only (Non-Minor Dependents)	Total
Aid Code		2S	2T	2U	2P	2R	
Current Month							
1	Main Payroll	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
2	Current Month Supplemental Payroll	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
3	Current Month Cancellation Contra Roll	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
4	Prior Month Supplemental Payroll	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5	Current Month Adjustment	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
6	Subtotal (Lines 1 - 5)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Prior Month							
7	Prior Month Cancellation Contra Roll	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8	Recoveries of Aid	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
9	Prior Month Negative Adjustment	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
10	Prior Month Positive Adjustment	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
11	Subtotal (Lines 7 - 10)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
12	TOTAL AID PAYMENTS, Current + Prior Months	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
13	Assistance Units	0	0	0	0	0	0
14	CalWORKs Portion	$0.00	$0.00	$0.00			$0.00
15	ARC Portion	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

CA 800 ARC | Details | Recoveries of Aid

Figure 2.1.1 – CA 800 ARC Mockup

CalSAWS CA 800 ARC

San Bernardino
Run Date: 03/04/2021 11:53 AM
Date: 02/01/2021

CA 800 ARC

Details

Total								0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00

								Person Count									
								Fed		Non-Fed		Other					
Type	Aid Code	Case Number	Control Number	Case Name	Payee Name	Benefit Month	Transaction Date	A	C	A	C	A	C	Fed Amt.	NFed Amt.	Other Amount	Amount

CA 800 ARC | Details | Recoveries of Aid

Figure 2.1.2 – CA 800 ARC Details Mockup

CalSAWS CA 800 ARC

San Bernardino
Run Date: 03/04/2021 11:53 AM
Date: 02/01/2021

CA 800 ARC

Recoveries of Aid

Total								$0.00	$0.00	$0.00	$0.00

Case Number	Transaction Number	Account Number	Transaction Type	Case Name	Payee Name	Benefit Month	Transaction Date	Fed Amount	Non-Fed Amount	Other Amount	Amount

CA 800 ARC | Details | Recoveries of Aid

Figure 2.1.2 – CA 800 ARC Recoveries of Aid Mockup

2.2 Description of Change

The Scheduled CA 800 ARC report to be migrated from C-IV to CalSAWS.

1. Modification logic for ARC program code which was converted from "AR" in C-IV to be the Foster Care program code "FC" in CalSAWS. This combined with aid codes "2S", "2T", "2U", "2P", "2R" and trans type "MP", "SI", "RB", "CN", "EX", "RE", "AJ"', "RC" and "RR"' are then identified as ARC program cases.

   Change program code from "AR" to "FC" wherever applicable.

2. Update report Logos to CalSAWS.

Base Population

CA 800 ARC

Provides a summary and details report of assistance expenditures for an Approved Relative Caregiver (ARC). This report is available on the 4th business day of the month.

CA 800 ARC Report Columns

CA 800 ARC TAB

Column Header	Description
CalWORKS Federal	Definition of Aid Code 2S
CalWORKS State	Definition of Aid Code 2T
CalWORKs State (Non-Minor Dependents)	Definition of Aid Code 2U
ARC Only	Definition of Aid Code 2P
ARC Only (Non-Minor Dependents)	Definition of Aid Code 2R
Totals	Totals of each row

Details TAB

Column Header	Description

Type	Claiming Transaction Type Code (catgy ID 420) Possible Values: • Main Payroll • Prior Month Cancellation • Prior Month Supplemental
Aid Code	This captures the aid code for the person (catgy ID 184) Possible Values: • 2S • 2T • 2U • 2P • 2R
Case Number	The CalSAWS assigned case number
Control Number	The CalSAWS control number of the issuance
Case Name	The name of the primary person from a case Format – First Name Last Name
Payee Name	The name of the payee on the issuance Format – First Name Last Name
Benefit Month	The month that the aid was issued for Format – MM/DD/YYYY
Transaction Date	The date the transaction was created Format – MM/DD/YYYY
Person Count FED A	This column holds the count of all federally funded adults in the case at the time of the issuance
Person Count FED C	This column holds the count of all federally funded children in the case at the time of the issuance
Person Count Non-Fed A	This column holds the count of all state or county funded adults in the case at the time of issuance
Person Count Non-Fed C	This column holds the count of all state or county funded children in the case at the time of the issuance

Person Count Other A	This column holds the count of all non-state and non-federally funded adults in the case at the time of the issuance.
Person Count Other C	This column holds the count of all non-state and non-federally funded children in the case at the time of the issuance.
Fed Amt.	The portion of the original issuance amount that is claimed by the federal government
NFed Amt.	The portion of the original issuance amount that is not claimed by the federal government
Other Amount	The portion of the original issuance amount that is not claimed by either the state OR federal government
Amount	Total amount of the issuance

Recoveries of Aid TAB

Column Header	Description
Case Number	The CalSAWS case number
Transaction Number	The Transaction number within CalSAWS
Account Number	Recovery of Aid Account Number within CalSAWS
Transaction Type	The decode value of the trans type code Possible Values: • Benefit Issuance Adjustment • Recovery Account Refund • Main Payroll Benefit Issuance • Receipted Collection • Cancellation of Benefit Issuance • Supplemental Benefit Issuance • Expunged Benefit
Case Name	The name of the primary person from a case Format – First Name Last Name

Payee Name	The name of the payee on the recovery of aid Format – First Name Last Name
Benefit Month	The month that the aid was issued for Format – MM/DD/YYYY
Transaction Date	The date the transaction was created Format – MM/DD/YYYY
Fed Amount	The portion of the original issuance amount that is claimed by the federal government
Non-Fed Amount	The portion of the original issuance that is not claimed by the federal government.
Other Amount	The portion of the original issuance amount is not claimed by either the state OR federal government
Amount	Total amount of the recovery of aid

2.3 Report Location

Global: Reports
Local: Scheduled
Task: State
Frequency: Monthly, on the fourth business day of the month
Title: CA 800 ARC
Description: Provides a summary and details of assistance expenditures for an Approved Relative Caregiver (ARC)

2.4 Counties Impacted

No change to current county entitlement configuration.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Location / Attachment
1	Reports	CA 800 ARC Mockup	CA 800 ARC ARC Mockup.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.4.4	The LRS shall include ad hoc capabilities that allow COUNTY-specified Users to create multiple ad hoc reports simultaneously, as specified by COUNTY.	This SCR is migrating existing reports as needed by the counties.

5 OUTREACH

N/A

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227257

Update the Non-MAGI Screening and Turning 65 Packets to be available to all counties

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/07/2021	1.0	Initial Revision	Rainier Dela Cruz

Table of Contents

1 Overview 5
1.1 Current Design 5
1.2 Requests 5
1.3 Overview of Recommendations 5
1.4 Assumptions 5
2 Recommendations 6
2.1 Non-MAGI Screening Packet 6
2.1.1 Overview 6
2.1.2 Description of Change 6
2.2 Non-MAGI Turning 65 Packet 6
2.2.1 Overview 6
2.2.2 Description of Change 7
2.3 Non-MAGI Turning 65 Packet Batch Job 7
2.3.1 Overview 7
2.3.2 Description of Change 7
2.3.3 Execution Frequency 7
2.3.4 Key Scheduling Dependencies 8
2.3.5 Counties Impacted 8
2.3.6 Data Volume/Performance 8
2.3.7 Failure Procedure/Operational Instructions 8
2.4 Mailing Priority 05 Bundling Batch Jobs 8
2.4.1 Overview 8
2.4.2 Description of Change 8
2.4.3 Execution Frequency 8
2.4.4 Key Scheduling Dependencies 8
2.4.5 Counties Impacted 9
2.4.6 Data Volume/Performance 9
2.4.7 Failure Procedure/Operational Instructions 9
2.5 Central Print Testing 9
2.5.1 Overview 9
2.5.2 Description of Change 9
3 Supporting Documents 10

4 Requirements 11
4.1 Project Requirements 11

1 OVERVIEW

1.1 Current Design

The Non-MAGI Screening and Turning 65 Packets are only available to Los Angeles County in the Template Repository. While the Non-MAGI Screening Packet automated batch process is configured to run for all counties, the Non-MAGI Turning 65 Packet automated batch process is only configured to run for Los Angeles County.

1.2 Requests

The Non-MAGI Screening and Turning 65 Packets need to be available to all counties from the Template Repository. The Non-MAGI Turning 65 Packet also need to be sent through the automated batch process for all counties.

1.3 Overview of Recommendations

1. Update the Template Repository county visibility for the Non-MAGI Screening Packet to all counties.

2. Update the Template Repository county visibility for the Non-MAGI Turning 65 Packet to all counties.

3. Update the Non-MAGI Turning 65 Packet batch process to run for all counties.

4. Update the scheduling of Mailing Priority 05 bundling batch jobs for the C-IV Migration Counties to run daily.

5. Create the Mailing Priority 05 bundling batch jobs for the CalWIN Migration Counties.

6. Conduct central print testing with the new print vendor by generating test bundles of the Non-MAGI Screening and Turning 65 Packets.

1.4 Assumptions

1. The automated batch process (PB00R538) that sends out the Non-MAGI Screening Packet runs for all counties.

2 RECOMMENDATIONS

2.1 Non-MAGI Screening Packet

2.1.1 Overview

The Non-MAGI Screening Packet is only available to Los Angeles County. Update the packet to be available to all counties.

State Form: N/A

Current Programs: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Application

Existing Languages: English, Spanish

2.1.2 Description of Change

1. Update the Template Repository visibility from 'Los Angeles County only' to 'All Counties'.

2. Update the mailing priority from '04' to '05'.

3. Update the coversheet:
    a. Align the addresses on the first page to match the address windows on the half size flat mail envelope.
    b. Update the second page to use the BRM header.

Form Mockups/Examples: Please see Supporting Documents #1 for an example.

4. Update the population logic to populate the BRM address on the second page of the coversheet. Use the existing framework to determine the address to populate on the form.

2.2 Non-MAGI Turning 65 Packet

2.2.1 Overview

The Non-MAGI Turning 65 Packet is only available to Los Angeles County. Update the packet to be available to all counties.

State Form: N/A

Current Programs: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Application

Existing Languages: English, Spanish

2.2.2 Description of Change

1. Update the Template Repository visibility from 'Los Angeles County only' to 'All Counties'.

2. Update the mailing priority from '04' to '05'.

Note: *Mailing priority 04 is reserved for packets. When the packets are sent to the print center, the packets for Los Angeles County are placed in the full size flat mail envelope, while the packets for the Migration Counties are placed in the half size envelope. The Non-MAGI Screening and Turning 65 Packets are being moved to mailing priority 05 so that the packets are placed in the half size flat mail envelopes for all counties.*

3. Update the coversheet:
    a. Align the addresses on the first page to match the address windows on the half size flat mail envelope.
    b. Update the second page to use the BRM header.

Form Mockups/Examples: Please see Supporting Documents #2 for an example.

4. Update the population logic to populate the BRM address on the second page of the coversheet. Use the existing framework to determine the address to populate on the form.

2.3 Non-MAGI Turning 65 Packet Batch Job

2.3.1 Overview

The Non-MAGI Turning 65 batch job only runs for Los Angeles County. Update the batch job to run for all counties.

2.3.2 Description of Change

1. Update the Non-MAGI Turning 65 batch job (PB19R1981) to a '00' job that runs for all counties.

2.3.3 Execution Frequency

No change.

2.3.4 Key Scheduling Dependencies

No change.

2.3.5 Counties Impacted

All counties.

2.3.6 Data Volume/Performance

The estimated number of records this batch processes is 5,200 per month.

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 Mailing Priority 05 Bundling Batch Jobs

2.4.1 Overview

The mailing priority 05 bundling batch jobs for the C-IV Migration Counties currently exist in CalSAWS but are not scheduled to run. The bundling batch jobs do not exist for the CalWIN Migration Counties in CalSAWS. Update the scheduling of bundling batch jobs for the C-IV Migration Counties to run daily and create the batch jobs for the CalWIN Migration Counties.

2.4.2 Description of Change

1. Schedule the PBXXP405 batch jobs for the C-IV Migration Counties. ***Note:*** *The 'XX' denotes the county code. For example, PB36P405 is the priority 05 bundling job for San Bernardino.*

2. Create the PBXXP405 batch jobs for the CalWIN Migration Counties.

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 job (PB19P405).

2.4.5 Counties Impacted

Migration Counties.

2.4.6 Data Volume/Performance

Approximately 5,200 records are processed monthly by the PBXXP405 jobs.

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 Central Print Testing

2.5.1 Overview

Conduct central print testing with the new CalSAWS print vendor by generating test bundles for mailing priority 05 and sending the bundles to the new print vendor to be printed.

2.5.2 Description of Change

1. Create a test bundle for mailing priority 05 for Los Angeles County. When creating the test bundle, include both the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet.

2. Create a test bundle for mailing priority 05 for the Migration Counties. When creating the test bundle, include both the Non-MAGI Screening Packet and Non-MAGI Turning 65 Packet and generate bundles for different counties.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	Non-MAGI Screening Packet Coversheet Mockup	NM_SCREENING_PKT_COVERSHEET_EN.pdf NM_SCREENING_PKT_COVERSHEET_SP.pdf
2	Client Correspondence	Non-MAGI Turning 65 Packet Coversheet Mockup	NM_TURNING_65_PKT_COVERSHEET_EN.pdf NM_TURNING_65_PKT_COVERSHEET_SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	The updates will allow the Non-MAGI Screening and Turning 65 Packets to be generated and sent out for all counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227343

Update Long Term Sanction Logic for C-IV Converted Data

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/13/2021	1.0	Initial Draft	T. Lazio

Table of Contents

1 Overview 4
1.1 Current Design 4
1.2 Requests 4
1.3 Overview of Recommendations 4
1.4 Assumptions 4
2 Recommendations 4
2.1 CW EDBC Rule Addition For Long Term Sanction Aid Code Determination 4
2.1.1 Overview 4
2.1.2 Description of Changes 5
2.1.3 Programs Impacted 5
2.1.4 Performance Impacts 5
3 Requirements 5
3.1 Project Requirements 5

1 OVERVIEW

CalSAWS uses data that doesn't exist in C-IV to determine long term sanction (LTS) aid codes 3F (CW-Safety Net/Felon/WTW Sanct-Two Parent) and K1 (CW-Safety Net/Felon/WTW Sanct-Non-Two Parent) for the CalWORKs (CW) program. The purpose of this SCR is to add logic to correctly determine LTS aid codes for newly converted cases from C-IV that do not yet have data history that can be used with the existing CalSAWS functionality.

1.1 Current Design

CalSAWS EDBC rules use data from a table (PGM_PERS_SANCTN) that does not exist in C-IV to apply long term sanction (LTS) aid codes for CW individuals that are determined to be long term sanctioned.

1.2 Requests

A new EDBC rule based on the C-IV LTS logic will be added to properly determine LTS aid codes 3F and K1 for C-IV converted cases that do not yet have EDBC sanction data history in CalSAWS. This will allow the C-IV converted cases to build up data history that can later be used by the existing CalSAWS LTS aid code determination rules.

1.3 Overview of Recommendations

1. Add EDBC rule based on C-IV LTS logic to allow the CalSAWS EDBC to properly determine LTS aid codes 3F and K1 for C-IV converted cases that do not yet have EDBC sanction data history in CalSAWS.

1.4 Assumptions

1. There will be no Batch Run needed for this SCR.

2. There will be no impact to ongoing CalSAWS cases with long term sanction aid codes or new intake cases.

2 RECOMMENDATIONS

2.1 CW EDBC Rule Addition For Long Term Sanction Aid Code Determination

2.1.1 Overview

To ensure that long term sanction aid codes are applied appropriately at migration for converted C-IV CW cases, a new EDBC rule based on C-IV LTS logic will be added into CalSAWS.

2.1.2 Description of Changes

1. Add a new CW EDBC rule based on the C-IV Long Term Sanction aid code logic with the following modifications:
    a. The new EDBC rule will have a lower priority than the existing CalSAWS LTS aid code rule in the EDBC rule hierarchy.
    b. The CW case is not in LA County.
    c. The LTS aid code was not determined by the existing LTS aid code with the higher priority.

2.1.3 Programs Impacted

CalWORKs

2.1.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.17	The LRS shall determine person and program aid code based on individual and case information by program.	Allow converted C-IV cases where long term sanction aid codes have been established to continue to use long term aid codes.