CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214742 | DDID 2301

FDS: API – Service Arrangement

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Avi Bandaranayake

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/11/2021	1.0	Initial Draft	Sridhar Mullapudi
4/5/2021	1.1	Updated based on QA comments	Avi Bandaranayake

Table of Contents

1   OVERVIEW

1.1   Current Design

This is a new API made available to provide the service arrangement data from the CalSAWS system.

1.2   Requests

Create a service that can retrieve service arrangement information for a given case ID.

1.3   Overview of Recommendations

1. Create a new endpoint to retrieve service arrangement information.

1.4   Assumptions

1. Results are limited to county level data.
2. Results returned will be paginated to 20 values by default.
3. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
4. Code table values for this API can be found in the Appendix.
5. Code table values are limited to those available as of the API release date.
6. Requests and Responses will use Code Table values as described in the Appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element.
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.

2   RECOMMENDATIONS

2.1   Service Arrangement API

2.1.1   Overview

This API will expose the service arrangement data from the CalSAWS system.

2.1.2   Description of Changes

1. The service arrangement API will include the following data elements, and error handling. Please refer to the **serviceArrangement.html** document for the technical specifications and data element definitions.

2.1.3   Request Parameter

The service arrangement API can be used to retrieve service arrangement information form CalSAWS. The request must contain caseNum and any of the following fields:

1. needCategory
2. needType
3. serviceBeginDate
4. serviceEndDate

2.1.4   Response

The API will return the following data elements:

```
[
  {
    "serviceArrangementID": "string",
    "serviceArrangementStartDate": "string",
    "serviceArrangementEndDate": "string",
    "aidCode": "string",
    "statCode": "string",
    "statRsnCode": "string",
    "statDate": "string",
    "amountApprovedPerPeriod": "string",
    "pgm": "string",
    "customerNeed": [
      {
        "custNeedTypeCode": "string",
        "custNeedCatCode": "string",
        "custNeedStatCode": "string",
        "custNeedStatRsnCode": "string",
        "custNeedBeginDate": "string",
        "custNeedEndDate": "string"
      }
```

```
  ],
  "customerActivity": [
    {
      "custActivityID": "string",
      "custActivityTypeCode": "string",
      "custActivityCatCode": "string",
      "custActivityBeginDate": "string",
      "custActivityEndDate": "string"
    }
  ],
  "person": [
    {
      "name": "string",
      "persID": "string"
    }
  ]
  }
]
```

2.1.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.1.6 Error Message

The service arrangement API will return error messages in the following Scenarios:

1. Bad request. {parameter name} is invalid. {Reason}

2. Authorization information is missing or invalid.

3. Not found. Request {parameter name} - {value} was not found.

4. Request Timeout.

5. Internal Server Error.

3   SUPPORTING DOCUMENTS

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

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2301	The CONTRACTOR shall create a service for the 58 Counties that returns service arrangements utilizing a CalSAWS API. Filters for need category, need type, need date, and service begin and end dates will be available. The service will return a list of service arrangements for a specified case including need information that meet the filter criteria.		Create service arrangement API

5 APPENDIX

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

CT 158: Service Arrangement Status Code
Approved
Cancelled
Closed
Discontinued
Extended

CT 26: Customer Activity Type Code
Employment
SIP
Work Study

CT 56: Service Type Code		
Adult Services	HA - Homeless Assistance	Police
Animal Services	Haircuts	Post CalWORKs 60-month Services
Appraisal	Healthy Way LA	Post Employment Services
Assessment	Homeless	Providing C/C - Comm Svc
Auto Repair	Homeless Court	Public Defender
Background Research	Hospitals	Rapid Employment & Promotion
CFET Retention Services	Housing Services	Reappraisal
CSE	Immigration Services	Refugee Services
Career Opportunities Resources & Employment	Insurance	Relocation/Housing
Case Manager Appointment	Intensive Case Management	Satisfactory School Attendance (REM)
Center	Internship	Security Officer Assessment
Child Care Referral	Job Club	Security Officer Training

Child Care Wait List	Job Development	Self Initiated Workfare
Children's Services	Job Fair	Self-Initiated Program
Clothing	Job Opportunity	Services 1: CLA
Commodities	Job Readiness	Services 2: DVS
Commonly used OHC Providers	Job Readiness Training	Services 3: MHS
Communities Services Block Grant	Job Readiness Training for Youth	Services 4: SAR
Community Service Orientation	Job Refusal/Voluntary Quit	Shelters
Community Service Placement	Job Search	Short-Term Training
Community Services	Job Search Referral	Small Family Day Care Home
Computer Application Class	Job Skills Assessment	Soup Kitchens
Consumer Services	Job Skills Training - Empl	Specialized Work Experience
Day Reporting Center	LTC - Long Term Care/Hospice Care	Subsidized Food
Define Your Image	Large Family Day Care Home	Subsidized Medical
Disaster Services	Learning Disabilities Evaluation	Suicide Prevention
Diversion - Other	Learning Disabilities Screening	Summer Youth Employment
Diversion - Shelter	Learning Disabilities Services	Support Groups
Diversion - Vehicle Purchase	Legacy GEARS	Supported Work/Transitional Employment
Domestic Violence	Legal Assistance	Tax Intercept
Drug Facility	Life Skills	Tax Services
Drug/Alcohol	Linkages	Tools
Education & Training	Literacy	Transportation
Education - Empl	Mental Health	Trustline Exempt Child Home
Education Related	Mentoring	Trustline Exempt Outside Home
Employment	Money Management	Trustline Required Child Home
Employment Needs Evaluation	Motor Vehicles	Trustline Required Outside Home
Employment Services	New	Uniforms
Exempt Center	Non-Custodial Parent	Utilities

Expungement	OHC Providers	Veteran Referral
Family	OJT - On the Job Training	Veterans Services
Family Reunification	Office Occupations	Vital Statistics
Fees/Licenses	On the Job Training - Drug or Alcohol Rehabilitation	Voc/Ed Training
Financial Services	On the Job Training - Grant Based	Vocational Assessment
Fire	On-the-Job Training	Volunteer Services
Food Pantries/Food Banks	One-Stop	Voter Registration
Foster Care	Orientation	WEX
GED	Orientation/Appraisal	WTW Retention Services
GROW Transition-Age Youth Employment Program (GTEP)	Other Welfare-To-Work	Work Study
GROW Youth Employment Program (GYEP)	Out-Patient Services	Workfare
Gas	Paid Work Experience	Workforce Investment Act
Group Activities	Pathways to Success	Working
		Youth

CT 18: Program Code
AAP
CalFresh
Cal-Learn
CalWORKs
CAPI
CFET
Child Care
Disaster CalFresh
Diversion
Foster Care

CT 18: Program Code
General Assistance (Managed)
General Assistance/General Relief (GR)
GROW
Homeless - Perm
Homeless - Temp
Immediate Need
Kin-GAP
Medi-Cal
Nutrition Benefit
RCA
REP
Welfare to Work

CT 159: Service Arrangement Status Reason Code
Activity Continued
Eligible for service
Erroneous entry
Item Returned
Job retention services
Management Authorized
No Longer Required
Not meeting requirements
Off Aid
Phase 3 eligible
Resource Needed
Service Provided
Services Ended
Special Need

Transfer to another county

CT 164: Customer Need Type Code		
Academic or Instructional Services	Foster Care Incidental Payment	On the Job Experience
Additional Case Rental Payment	Full Rent Assistance	Other
Adult Care	Funeral Costs	PES Clothing Allowance
Adult School Fees	GA Incidentals	Parenting
Advocacy	GA Other	Parking Fee
Alcohol/Drug	GED Achievement Stipend	Partial Rent Assistance
Ancillary/Other Services	GROW - Uniforms	Permanent
Anger Management	GROW Housing Allowance	Personal Care Kit
Assessment	Gas Card	Placement Assistance
Assistance Animal	Gift Certificate	Prenatal Care
Back-to-School Clothing Allowance	Government Agency	Prevent Eviction
Background Check	Graduation Bonus	Prevent Foreclosure
Basic School Supply Allowance	Guard Card	Property Taxes
Board and Care	Habitability Items	Rate Patch
Books	Haircut	Reading/Math Skills
Books/Supplies/Fees	High School Diploma/GED	Recommended Books
Bus Card	High School Graduation Award	Relocation Expenses
Bus Pass	Homeowners Repair	Rental Assistance
Bus Pass - No Valid Month	Hotel/Interim/Temp Housing	Respite
Bus Pass - Valid Month	Household Necessity	Retention Services
Bus Ticket	Housing Support	Return to Residence
Bus Token	IHSS	Rpt Card Bonus
Bus Token	Immigration Legal Services	SSA Referral
Bus Transfers - Cash	Imprest Cash	SSI Advocacy

Campus Parking	Infant Supplemental Rate - State	SUAS
Car Seats	Infant and Child Nutrition Services	School Backpack
Career Counseling	Infant and Toddler Health Care	School Books
Certificates/Licenses	Intimate Partner Violence Services	School Fees
Check Cashing Agency	JCO/JCL Clothing Allowance	School Supplies
Child Care	Job Services	Security Deposits
Clothing	Job Skills Training	Shelter
Clothing Allowance	LIHEAP	Shower
Clothing/Shoes	LTC	Special Education Classes
Credit Repair/Past Evictions	Labor and Material Cost	Special Needs Care
DMV Fees/License	Laptop/Tablet/Other Computer	State Supp Clothing Allowance
Dependent Care	Legal Docs for Work	Student Bus Pass
Diaper Allowance	Legal Services	Substance Abuse Services
Diaper Allowance	License/Certificate/Degree	Supplemental Homeless Assistance
Disabled Services	Limited Disability - Accommodations	Tap Card
Domestic Abuse Services	Limited Participation	Tattoo Removal
Drug Testing	Linkages	Taxi Fare
Early Learning/Interaction Activity	Literacy Skills	Temporary
Education Related	Lodging	Tools
Education Stipend	Lump Sum	Tools/Equipment
Education Travel Reimbursement	Meals	Transportation
Educational Support Payment	Meals Out Catastrophe	Uniforms
Elder Care	Meals Out Exception Situation	Utilities
Emergency Clothing Allowance	Medical Evaluation	Utility Payments

English Language Skills	Medical Release	Vehicle Diagnosis
English as Second Language	Medical Verification Fees	Vehicle Repair
Family	Medical/Legal Services	Vehicle Services
Family Conference	Mental Health Services	Verification Fees
Family Reunification	Mentoring	Vocational Rehab
Family Reunification Housing Support	Mileage-Borrowed	WTW
Family Reunification Moving Assistance	Mileage-Private	Work Related
Fees	Mileage-Shared	Work Release (legal)
Felon Friendly Services	Moving Cost Assistance	Work Supplies
Financial Planning	Moving Costs	Work Tools/Bag
Fire Insurance	Moving and/or Storage Cost	Workforce Readiness Services
Flexible Schedule	Multi-Disciplinary Team	Youth
Food	Occupational/Trade Tools	

CT 163: Customer Need Category Code	
Ancillary - Education	GR Non-Recurring Special Need
Ancillary - Work Related	GROW
CalLearn Bonus	Home Visit Program (HVP)
CalWORKs EOA	Home Visit Program (HVP) - Transportation
Counseling	Homeless Assistance
County Specific Program	Housing Support Program (HSP)
Dependent Care	LD Accommodations
Diversion Services	Medical/Legal Services
Education/Job Training	Other
Family Stabilization	Other Supportive Services
Family Stabilization - Transportation	Special Needs
Foster Care/Kin-GAP Services	Transportation

CT 69: Customer Need Status Code
Denied
Indicated
Met

CT 126: Customer Need Status Reason Code
Child Care Certificate Created
Documented
No Available Resource
No Longer Required
Not Eligible
Not in an approved activity
Other Resources Available
Other transporation available.
Referral Created
Service Arrangement Created
Waived

CT 54: Service Category Code	
Appraisal/Assessment	Government/Community Organizations
CFET	IDs and Vital Records
Child Care Wait List	Legacy
Community/LD Services	Licensed Child Care
Counseling	Medical/Health Services
Education	New
Emergency Services	Other Health Coverage
Employment	Subsidized Employment Referral

Exempt Child Care	Training
Food	Vendors
GROW	WPR

CT 184: Aid Code

01 - RCA	58 - OBRA-ESO/Pregnancy	D7 - OBRA-LTC-Disabled-SOC
02 - RMA/EMA	59 - Continuing TMC-Full	D8 - OBRA-MI-Pregnancy-No SOC
03 - AAP-Fed	5C - PE HF to MC NP	D9 - OBRA-MI-Pregnancy-SOC
04 - AAP-State	5D - PE HF to MC PPY	E1 - Bridging-Unverified Citizen-1 Month Limited
05 - SED-Non EA	5F - OBRA-Pregnancy	E2 - Infant-19 ACA CHIP Lawful Citizen
06 - Fed AAP Cash Subsidy Out-of-State	5J - Pending SP-DDSD - No SOC-Restrict.	E3 - New Adult Group LTC
07 - AAP-Extended-Fed	5K - FC-EA	E4 - Infant-19 ACA CHIP Undocumented
08 - Foster Care - Cuban/Haitian-Entrants	5R - Pending SP-DDSD - SOC	E5 - Child 1-19 ACA CHIP Premium
09 - CalFresh	5T - Continuing TMC-ESO/Pregnancy	E7 - Infant - Above 267-322%
0C - Access for Infants and Mothers	5V - Trafficking/Crime Victim no SOC	F0 - HCCI - LIHP
0D - MCAP Pregnant Woman-213-322% FPL	5W - 4 Month Cont.-ESO/Pregnancy	F1 - MC No SOC State Inmates
0E Pregnant Women 213 - 322%	5X - Extended TMC, terminated 10/1/2003	F2 - No SOC MC for Undoc State Inmates
0F - TCF	5Y - Extended TMC, terminated 10/1/2003	F3 - MC County Inmate Inpatient Hospital Only
0G MCAP Pregnant Woman - 213 - 322% FPL	60 - Disabled - SSI/SSP	F4 - MC Undoc County Inmates
0H - Transitional Nutrition Benefit	63 - LTC-Disabled	F5 - MCE ST Inmates
10 - Aid to the Aged - SSI/SSP	64 - MN-Disabled-No SOC	F6 - MCE CO Inmates

13 - LTC-Aged	65 - Hurricane Katrina Evacuees	F7 - MCE Existing
14 - MN-Aged-No SOC	66 - Pickle-Disabled	F8 - LIHP - MCE
16 - Pickle-Aged	67 - MN-Disabled-SOC	F9 - HCCI LIHP - CI
17 - MN-Aged-SOC	68 - Disabled-IHSS-SOC	G1 - MC SOC State Inmates
18 - Aged-IHSS	69 - 200% OBRA Infant	G2 - SOC MC for Undoc State Inmates
1A - CAPI-Qualified-Aged	6A - DAC-Blind	G3 - Medi-Cal County Inmate SOC Inpatient Hospital Only
1E - CCE for the Aged	6C - DAC-Disabled	G4 - Medi-Cal County Inmate Undoc SOC Inpatient Hospital Pregnancy+ ESO
1H - FPL-Aged-Full-No SOC	6E - CCE for the Disabled	G5 - County Juvenile Inmate Inpatient Hospital+ Inpatient MH
1U - FPL-Aged-ESO-No SOC	6G - 250% Working Disabled-Full	G6 - County Juvenile Inmate Undoc, ESO Inpatient Hospital, MH & Pregnancy
1V - RCA - TCVAP (State)	6H - FPL Disabled-Full	G7 - County Juvenile Inmate, SOC Inpatient Hospital & Inpatient MH
1X - MSSP without a SOC	6J - SB87 Pending SP-DDSD - No SOC	G8 - County Juvenile IM Undoc, SOC, ESO Inpatient Hospital, MH & Pregnancy
1Y - MSSP with a SOC	6K - CAPI-Non Qualified	G9 - Compassionate Release No SOC State
20 - Blind - SSI/SSP	6M - CAPI-Sponsored	H0 - Child 6-19 133-266%
23 - LTC-Blind	6R - SB87 Pending SP-DDSD - SOC	H1 - Infant 200-250%
24 - MN-Blind-No SOC	6T - CAPI-Limited Term	H2 - Child 1-6 133-150%
26 - Pickle-Blind	6U - FPL-Disabled-ESO/Pregnancy	H3 - Child 1-6 150-250% P
27 - MN-Blind-SOC	6V - DDS Waiver-No SOC	H4 - Child 6-19 100-150%
2A - Abandoned Baby	6W - DDS Waiver-SOC	H5 - Child 6-19 150-250% P
2E - CCE for the Blind	6X - IHO Waiver - No SOC	H6 - Infant 209-266%
2H - FPL-Blind-Full-No SOC	6Y - IHO Waiver - SOC	H7 - Child 1-6 -142%

2K - IHSS Community First Choice Option	71 - Dialysis/Dialysis Supplement	H8 - Child 6-19 - 0-133%
2L - IHSS Plus Waiver	72 - 133% Child-Full	H9 - Child 1-6 143-266%
2M - Personal Care Services	73 - TPN/TPN Suppl.	IE - IE MC Member-Non Sneede MFBU
2N - IHSS Residual	74 - 133% Child-ESO	Indigent Burial
2P - ARC only	76 - 60-Day Postpartum	J1 - Compassionate Release No SOC County
2R - ARC only for NMD	77 - Anti-Rejection Medicine	J2 - Compassionate Release SOC County
2S - ARC - Fed CW	7A - 100% Child-Full	J3 - County Medical Probation No SOC
2T - ARC - State CW	7C - 100% Child-OBRA-ESO	J4 - County Medical Probation SOC
2U - ARC - State CW for NMD	7H - TB	J5 - Compassionate Release LTC Aged County
2V - Trafficking/Crime Victim no SOC	7J - CEC-Full	J6 - Compassionate Release LTC Aged County Restricted
30 - CW-All Other Families (Fed)	7K - CEC-ESO	J7 - Compassionate Release LTC Disabled County
32 - CW-TANF-Timed Out (Fed)	7M - Minor Consent-Family Planning	J8 - Compassionate Release LTC Disabled County Restricted
32 - CW-TANF-Timed Out (State)	7N - Minor Consent-Pregnancy	K1 - CW-Felon-Safety Net-Non-Two Parent
33 - CW-Zero Parent (Fed)	7P - Minor Consent-Outpatient Mental Health	K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
34 - AFDC-MN-No SOC	7R - Minor Consent-Sexual Assault	K6 - MAGI ACA N/E Adult (19 - 64) County Comp Release/ <138% FPL, Citizen
35 - CW-Two Parent (Fed)	7S - Title XIX, parents 19-64, not blind or disabled, no SOC	K7 - MAGI ACA N/E Adult (19 - 64) County Comp Release/ <138% FPL, Undoc
35 - CW-Two Parent (State)	7U - Title XIX, CalFresh adults from 19 through 64, no SOC	K8 - MAGI ACA NNE Adult (19 - 64) County Comp Release/ <128% FPL, Citizen

36 - Disabled-COBRA-Widow/ers	7V - Trafficking/Crime Victim with a SOC	K9 - MAGI ACA NNE Adult (19 - 64) County Comp Release/ <128% FPL, Undoc
37 - AFDC-MN-SOC	7W - Title XIX, children under age 19 not blind or disabled, no SOC	L1 - LIHP Transitional Aid Code
38 - Edwards v. Kizer	7X - Bridging-Child-1 Month Limited	L6 - Citizen/Lawfully Present 19-64 Years Old 128% Full
39 - Initial TMC-Full	7Y - Bridging-Adult-1 Month Limited	L7 - Undocumented 19-64 Years Old 128% Restricted
3A - (Prior to 12/2013)	80 - QMB	L9 - 21-64 Year Old 138% Full 5 Year Bar
3A - CW-Timed Out-Safety Net-All Other Fam.	82 - MI-Child-No SOC	M0 - Pregnant Women - 60-213% - Undocumented
3C - (Prior to 12/2013)	83 - MI-Child-SOC	M1 - 19-64 Year Old 138% Full
3C - CW-Timed Out-Safety Net-Two Parent	84 - CMSP - Full - No SOC	M2 - 19-64 Year Old 138% Restricted
3D - Cash Based MC	85 - CMSP - Full - SOC	M3 - Parent Caretaker Relative - at or below 109% - Full
3E - CW-All Other Families (Mixed)	86 - MI-Pregnancy-No SOC	M4 - Parent Caretaker Relative - at or below 109% - Restricted
3F - CW-Felon-Safety Net-Two Parent	87 - MI-Pregnancy-SOC	M5 - Child 6-19 - 108-133% - Citizen
3F - CW-Safety Net/Felon/WTW Sanct-Two Parent	88 - CMSP - Non-Fed - Full - No SOC	M6 - Child 6-19 - 108-133% - Undocumented
3G - CW-Zero Parent (State)	88 - CMSP - Pending DDSD - Full - No SOC	M7 - Pregnant Women - 60% - Citizen
3H - CW-Zero Parent (Mixed)	89 - CMSP - Non-Fed - Full - SOC	M8 - Pregnant Women - 60% - Undocumented
3J - Diversion-All Other Families (Fed)	89 - CMSP - Pending DDSD - Full - SOC	M9 - Pregnant Women - 60-213% - Citizen
3K - Diversion-Two Parent (Fed)	8A - QWDI	N0 - Co. Inmate LIHP/MCE Transition to MC
3L - CW-All Other Families (State)	8C - SLMB	N5 - 19-64 Year Old State Inmate - 0-138% - Limited

3M - CW-Two Parent (State)	8D - Qualified Individual 1-135%	N6 - 19-64 Year Old State Inmate - 0-138% - Restricted
3N - AFDC-1931(B) Full	8E - Accelerated Enrollment of Children	N7 - 19-64 Year Old County Inmate - 0-138% - Limited
3P - CW-All Other Families-Exempt MAP (Fed)	8F - CMSP - LTC	N8 - 19-64 Year Old County Inmate - 0-138% - Restricted
3R - CW-Zero Parent-Exempt MAP (Fed)	8K - Qualified Individual 2-175%	P0 - Infant - 0-208% - Undocumented
3T - Initial TMC-ESO/Pregnancy	8N - 133% Excess Property Child-ESO	P1 - Hospital PE Infant - 0-208%
3U - CW-Two Parent (State)	8P - 133% Excess Property Child-Full	P2 - Hospital PE Parent Caretaker Relatives - 0-109%
3V - AFDC-1931(B)-ESO/Pregancy	8R - 100% Excess Property Child-Full	P3 - Hospital PE Adults - 0-138%
3W - CW-TANF-Timed Out (Fed)	8T - 100% Excess Property Child-ESO	P4 - Hospital PE Pregnant Women - 0-213%
3W - CW-TANF-Timed Out (State)	8U - CHDP Gateway Deemed Infant - NO SOC	P5 - Child 6-19 - 0-133% - Citizen
3X - Diversion-All Other Families (State)	8V - CHDP Gateway Deemed Infant - SOC	P6 - Child 6-19 - 0-133% - Undocumented
3Y - Diversion-Two Parent (State)	8W - CHDP Gateway Medi-Cal	P7 - Child 1-6 - 0-142% - Citizen
40 - AFDC-FC (State)	8X - CHDP Gateway HF	P8 - Child 1-6 - 0-142% - Undocumented
42 - AFDC-FC (Fed)	8Y - CHDP	P9 - Infant - 0-208% - Citizen
43 - FC Extended (State)	90 - GA General Relief Independent Living-CNTY	R1 - CW - TCVAP (State)
44 - 200%-Pregnancy Citizen	91 - GA General Relief-B/C Non Independent Living-CNTY	R2 - CF - TCVAP (State)
45 - FC (County)	92 - GA General Relief-R/B Non Independent Living-CNTY	R4-WINS Non-Two-Parent
46 - Fed Funded FC Benefits Out-of-State	93 - GA General Relief-MFG Child-CNTY	R5-WINS Two-Parent
47 - 200%-Infant-Full	94 - GRI Emergency Assistance	R6-WINS CFAP
48 - 200%-Pregnancy-OBRA	95 - Unemployable, Independent Living, Single	R7-WINS Non-Two Parent TCF

49 - FC Extended (Federal)	96 - Unemployable, Facility, Family Group	R8-WINS Two-Parent TCF
4A - Out of State AAP	97 - Unemployable, Facility, Single	R9-WINS TCFAP
4C - Voluntary Placement	98 - Aid In Kind	RE - SF Retention
4E - Presumptive Eligibility for Former Foster Care Children	99 - Electronic Theft Replacement Cash Benefit	RR - RR MC Member-Sneede MBU
4F - Kin-GAP (Fed)	9A - SF AGEX	T0 - Infant - 208-266% - Undocumented
4F - Kin-GAP (State)	9G - Return to Residence	T1 - Child 6-19 - 160-266% - Citizen
4G - Kin-GAP (State)	9H - Healthy Families Child	T2 - Child 6-19 - 133-160% - Citizen
4G - Kin-GAP (State) beyond age 18 due to a disability	9I - SF CALM	T3 - Child 1-6 - 160-266% - Citizen
4H - Foster Care Child in CalWORKs	9J - SF PAES	T4 - Child 1-6 - 142-160% - Citizen
4K - Probation Emergency Assistance	C1 - OBRA-MN-Aged-No SOC	T5 - Infant - 208-266% - Citizen
4L - 1931(b) Foster Care	C2 - OBRA-MN-Aged-SOC	T6 - Child 6-19 - 160-266% - Undocumented
4M - FC Continuing Medi-Cal	C3 - OBRA-MN-Blind-No SOC	T7 - Child 6-19 - 133-160% - Undocumented
4N - Extended CalWORKS for NMDs	C4 - OBRA-MN-Blind-SOC	T8 - Child 1-6 - 160-266% - Undocumented
4P - CW Family Reunification-All Families	C5 - OBRA-MN-AFDC-No SOC	T9 - Child 1-6 - 142-160% - Undocumented
4R - CW Family Reunification-Two Parent	C6 - OBRA-MN-AFDC-SOC	X1 - Covered CA Subsidized (APTC and/or State Subsidy) 250-400%
4S - Kin-GAP Extended (Fed)	C7 - OBRA-MN-Disabled-No SOC	X2 - Covered CA Subsidized 100-150%
4T - Kin-GAP (Fed)	C8 - OBRA-MN-Disabled-SOC	X3 - Covered CA Subsidized 151-200%
4V - Trafficking/Crime Victim with a SOC	C9 - OBRA-MI-Child-No SOC	X4 - Covered CA Subsidized 201-250%

4W - Kin-GAP Extended (State)	D1 - OBRA-MI-Child-SOC	X5 - Covered CA Cost Sharing Waiver 100-300%
50 - CMSP - Restricted	D2 - OBRA-LTC-Aged-No SOC	X6 - Covered CA AI/AN CSR Only No Income Test
53 - MI-LTC	D3 - OBRA-LTC-Aged-SOC	X7 - Covered CA Unsub Coverage or Ineligible for Subsidies Above 600%
54 - MC Four Month Continuing	D4 - OBRA-LTC-Blind-No SOC	X8 - Covered CA Lawful Present/MC Ineligible Under 100%
55 - OBRA-LTC	D5 - OBRA-LTC-Blind-SOC	X9 - Covered CA State Subsidy Eligible 400-600%
55 - OBRA-LTC-MI	D6 - OBRA-LTC-Disabled-No SOC	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214743 | DDID 2340

FDS: API – Activities API

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/8/21	1.0	Initial Draft	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

This is a new API made available to provide activity data from the CalSAWS system.

1.2 Requests

Create a service that will allow the 58 Counties to search for activities service type, location, dates, activity type, and date. When a specific activity instance is identified, the service will return a list of participants within the instance of the activity. The service will also allow the 58 Counties to search for activities associated to a particular person with filters for activity type and status.

1.3 Overview of Recommendations

Create a new endpoint that will retrieve activities information.

1.4 Assumptions

1. Results are limited to county level data.
2. Results returned will be paginated to 20 values by default.
3. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
4. Code table values for this API can be found in the Appendix.
5. Code table values are limited to those available as of the API release date.
6. Requests and Responses will use Code Table values as described in the Appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.

2 RECOMMENDATIONS

2.1 Activities API

2.1.1 Overview

This API will expose activity data from the CalSAWS system.

2.1.2 Description of Changes

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

Additional examples and specific error messages may be added during build for the developer portal.

2.1.3 Request

The API will include the following request parameters:
1. Person id
2. Id (activity id)
3. Type (activity type)
4. Status (activity status)
5. Service Id
6. custActivCatgry
7. custActivType
8. servActivStatus
9. servActivBegDate
10. addrLine1Addr
11. addrCityName
12. addrState
13. addrZipCodeNum
14. proximity

2.1.4 Response

The API will return the following objects and elements.

```
custActiv
[
  {
    "id": "string",
    "custActivCatgry": "string",
    "type": "string",
    "activNumIdentif": "string",
    "persName": "string",
    "caseNum": "string",
    "startTime": "string",
    "stopTime": "string",
    "status": "string",
    "statRsn": "string",
    "begDate": "2021-04-01",
    "endDate": "2021-04-01",
    "hrQty": 0
  }
]
 classListRes
[
  {
    "customerName": "string",
    "caseNum": "string",
    "workerNumIdentif": "string",
```

```
    "workerName": "string",
    "additionalInfo": "string"
  }
]
servActivSearch
[
  {
    "servId": "string",
    "activNumIdentif": "string",
    "orgName": "string",
    "dates": "2021-04-01",
    "startTime": "string",
    "language": "string",
    "address": "string",
    "status": "string",
    "proximity": "string"
  }
]
```

2.1.5 Error Messages

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

3   SUPPORTING DOCUMENTS

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

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2340	The CONTRACTOR shall create a service allowing 58 Counties to retrieve activities utilizing a CalSAWS API. The	The API complexity accounts for the numerous filters that will be available to	Create Activities API

service will allow the 58 Counties to do the following: 1) Search for activities service type, location, dates, activity type and date. When a specific activity instance is identified, the service will return a list of participants within the instance of the activity. 2) Search for activities associated to a particular person with filters for activity type and status.	search for activities which includes by service type, location, date, type, or person.	

5 APPENDIX

Short decode values from code tables.

CT 54 Service Category	CT 56 Service Type
Appraisal/Assessment	Appraisal
	Assessment
	Child Care Referral
	Group Activities
	Job Club
	Orientation
	Orientation/Appraisal
	Other Welfare-To-Work
	Post CalWORKs 60-month Services
	Reappraisal
	WTW Retention Services
CFET	CFET Retention Services
	Job Club
	Job Search
	Self Initiated Workfare
	Workfare
Community/LD Services	Community Service Orientation
	Community Service Placement

CT 54 Service Category	CT 56 Service Type
	Learning Disabilities Evaluation
	Learning Disabilities Screening
	Learning Disabilities Services
Counseling	Domestic Violence
	Drug Facility
	Drug/Alcohol
	Family
	Mental Health
	Mentoring
	Suicide Prevention
	Support Groups
GROW	
Subsidized Employment Referral	On-the-Job Training
	Paid Work Experience
	Specialized Work Experience
WPR	Community Services
	Education - Empl
	Job Readiness
	Job Skills Training - Empl
	Providing C/C - Comm Svc
	Satisfactory School Attendance (REM)
	Voc/Ed Training
	WEX

CT 35 Service Activity Status
Active
Closed
Canceled

CT 241 State Code	
AA	MP
AE	MS
AK	MT
AL	NC
AP	ND
AR	NE
AS	NH
AZ	NJ

CT 241 State Code	
CA	NM
CO	NV
CT	NY
DC	OH
DE	OK
FL	OR
FM	PA
GA	PR
GU	RI
HI	SC
IA	SD
ID	SI
IL	TN
IN	TX
KS	UT
KY	VA
LA	VI
MA	VT
MD	WA
ME	WI
MH	WV
MI	WY
MN	XX
MO	

CT 145 Language
Spanish
English
Korean
Tagalog, Filipino
Other Chinese Language
Cantonese (Chinese)
Mandarin (Chinese)
Cambodian
Armenian
Hmong
Lao
Russian
Arabic
Farsi

CT 145 Language
Vietnamese

CT 21 Customer Activity Status
Active
Closed
Completed

CT 124 Customer Activity Status Reason
Activity Cancelled
Assigned to Different Provider
Attending
Completed Determined LD
Employed
Completed Satisfactory
Declined
Drop out
Employed Prior to Start Date
Exempt
Good Cause
Interrupted
Moved
Non-Compliance
Non-Compliance Occurred
Not Qualified
Non-Compliance Resolved
No Show
Off Aid After Start Date
Off Aid Prior to Start Date
Progress Report Overdue
Processing
Referred
Rescheduled Prior to Start Date
Transferred to Another Activity
Unemployable
Unsatisfactory Performance

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214752 | DDID 2349

FDS: API – Person API

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/8/21	1.0	Initial Draft	Avi Bandaranayake
4/1/21	1.1	Updates based on QA comments.	Avi Bandaranayake

Table of Contents

1   OVERVIEW

1.1   Current Design

This is a new API made available to provide the person data from the CalSAWS system.

1.2   Requests

Create a service that will allow the 58 Counties to search for individuals utilizing a person id, case number, or demographic information such as first name, last name, date of birth, and SSN.

1.3   Overview of Recommendations

Create a new endpoint that will retrieve person information.

1.4   Assumptions

1. Results are limited to county level data.
2. Results returned will be paginated to 20 values by default.
3. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
4. Code table values for this API can be found in the Appendix.
5. Code table values are limited to those available as of the API release date.
6. Requests and Responses will use Code Table values as described in the Appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.

2   RECOMMENDATIONS

2.1   Person API

2.1.1   Overview

This API will expose person data from the CalSAWS system.

2.1.2   Description of Changes

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

Additional examples and specific error messages may be added during build for the developer portal.

2.1.3 Request

The API will include the following request parameters for:
1. Case Number
2. SSN
3. CIN
4. Last name
5. First name
6. DOB
7. Phone number
8. Person Id

2.1.4 Response

The Person API will return the following objects and elements. Actual return object might have data ordered differently.

```json
{
    "persId": "string",
    "cases": [
      {
        "caseNum": "string"
      }
    ],
    "ssn": "string",
    "cin": "string",
    "lastName": "string",
    "midName": "string",
    "firstName": "string",
    "nameSuffix": "string",
    "dob": "2021-04-01",
    "age": "string",
    "homePh": "string",
    "mobilePh": "string",
    "emailAddr": "string",
    "spokenLang": "string",
    "writtenLang": "string",
    "ethnicity": "string",
    "addr": {
      "cityName": "string",
      "line_1Addr": "string",
      "line_2Addr": "string",
      "stateCode": "string",
      "county": "string",
      "regn": "string",
      "zipCodeSuffix": "string",
      "zipCodeNum": "string",
      "country": "string"
    },
    "incomes": {
      "category": "string",
```

```
    "type": "string",
    "employment": "string",
    "freq": "string",
    "incDescr": "string",
    "incomeAmounts": [
      {
        "program": "string",
        "amount": 0,
        "endRsnDescr": "string",
        "begDate": "2021-04-01",
        "endDate": "2021-04-01",
        "fcIncomeDetls": {
          "exemptInd": "string",
          "exemptRsn": "string",
          "begDate": "2021-04-01",
          "endDate": "2021-04-01"
        }
      }
    ]
  }
}
```

2.1.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.1.6 Error Messages

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

3   SUPPORTING DOCUMENTS

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

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2349	The CONTRACTOR shall create a service for the 58 Counties that returns person information utilizing a CalSAWS API. The service will allow the 58 Counties to search for individuals utilizing a person id, case number, or demographic information such as first name, last name, date of birth, and SSN. A list of people matching the search criteria will be returned including individual demographic information, address information, contact information, special circumstances (accommodations), and income information.	The API complexity accounts for the ability to search for cases utilizing multiple filters and variety of individual level data that will be returned.	Create Person API

5   APPENDIX

Short decode values from code tables.

CT 241 State Code	
AA	MP
AE	MS
AK	MT
AL	NC
AP	ND
AR	NE
AS	NH
AZ	NJ
CA	NM
CO	NV
CT	NY
DC	OH
DE	OK
FL	OR
FM	PA
GA	PR
GU	RI
HI	SC
IA	SD
ID	SI
IL	TN
IN	TX
KS	UT
KY	VA
LA	VI
MA	VT
MD	WA
ME	WI
MH	WV
MI	WY
MN	XX
MO	

CT 15 County	
Alameda	Placer
Alpine	Plumas

CT 15 County	
Amador	Riverside
Butte	Sacramento
Calaveras	San Benito
Colusa	San Bernardino
Contra Costa	San Diego
Del Norte	San Francisco
El Dorado	San Joaquin
Fresno	San Luis Obispo
Glenn	San Mateo
Humboldt	Santa Barbara
Imperial	Santa Clara
Inyo	Santa Cruz
Kern	Shasta
Kings	Sierra
Lake	Siskiyou
Lassen	Solano
Los Angeles	Sonoma
Madera	Stanislaus
Marin	Sutter
Mariposa	Tehama
Mendocino	Trinity
Merced	Tulare
Modoc	Tuolumne
Mono	Ventura
Monterey	Yolo
Napa	Yuba
Nevada	Out of State
Orange	

CT 244 Region	
Countywide	Region 23
Mountains	Region 24
Nationwide	Region 25
Statewide	Region 26
Valley	Region 27
West End	Region 28
Bakersfield	Region 29
Chowchilla	Region 3
Corcoran	Region 30
Districts	Region 31

CT 244 Region	
Eastern County	Region 32
Eastern Slope	Region 33
Fort Bragg	Region 34
Lower Desert	Region 35
Madera	Region 36
Mountain	Region 37
Region 10	Region 38
Region 1	Region 39
Region 11	Region 4
Region 12	Region 40
Region 13	Region 5
Region 14	Region 6
Region 15	Region 7
Region 16	Region 8
Region 17	Region 9
Region 18	Rest of County
Region 19	Upper Desert
Region 2	Ukiah
Region 20	Western County
Region 21	Willits
Region 22	Western Slope

CT 228 Country	
Aruba	Christmas Island
Antigua	Kuwait
United Arab Emirates	Kazakhstan
Afghanistan	Laos
Algeria	Lebanon
Azerbaijan	Latvia
Albania	Lithuania
Armenia	Liberia
Andorra	Slovakia
Angola	Palmyra Atoll
American Samoa	Liechtenstein
Argentina	Lesotho
Australia	Luxembourg
Ashmore & Cartier Islands	Libya
Austria	Madagascar
Anguilla	Martinique
Antarctica	Macau

CT 228 Country	
Bahrain	Moldova
Barbados	Mayotte
Botswana	Mongolia
Bermuda	Montserrat
Belgium	Malawi
Bahamas	Montenegro
Bangladesh	Macedonia
Belize	Mali
Bosnia & Herzegovina	Monaco
Bolivia	Morocco
Burma	Mauritius
Benin	Midway Islands
Belarus	Mauritania
Soloman Islands	Malta
Navassa Island	Oman
Brazil	Maldives
Bassas Da India	Mexico
Bhutan	Malaysia
Bulgaria	Mozambique
Bouvet Island	New Caledonia
Brunei	Niue
Burundi	Norfolk Island
Canada	Niger
Cambodia	Vanuatu
Chad	Nigeria
Sri Lanka	Netherlands
Congo, Republic of	Norway
Congo, Democratic Republic of	Nepal
China	Nauru
Chile	Surinam
Cayman Islands	Netherlands Antilles
Cocos (Keeling) Islands	Nicaragua
Cameroon	New Zealand
Comoros	South Sandwich Island
Colombia	Grenadines, The
No Mariana Islands	Paraguay
Coral Sea Islands	Pitcairn Islands
Costa Rica	Peru
Central African Republic	Paracel Islands
Cuba	Spratley Islands

CT 228 Country	
Cape Verde	Pakistan
Cook Islands	Poland
Cyprus	Panama
Canal Zone	Portugal
Denmark	Papua New Guinea
Djibouti	Republic of Palau
Dominica	Guinea-Bissau
Jarvis Island	Qatar
Dominican Republic	Serbia
Ecuador	Reunion
Egypt	Marshall Islands
Ireland	Romania
Equatorial Guinea	Philippines
Estonia	Puerto Rico
Eritrea	Russia
El Salvador	Rwanda
Ethiopia	Saudi Arabia
Europa Island	St Pierre & Miquelon
Czech Republic	St Kitts & Nevis (St Christopher & Nevis)
Antarctic Lands	Seychelles
French Guiana	South Africa
Finland	Senegal
Fiji	St Helena
Falkand Islands	Slovenia
Federated States of Micronesia	Sierra Leone
Faroe Islands	San Marino
French Polynesia	Singapore
Baker Island	Somalia
France	Spain
French Southern & Antarctic Lands	St Lucia
Gambia	Sudan
Gabon	Svalbard
Georgia	Sweden
Ghana	South Georgia & the South Sandwich Islands
Gibraltar	Syria
Grenada	Switzerland
Guernsey	Trinidad & Tobago
Greenland	Tromelin Island
Germany	Thailand
Glorioso Islands	Tajikistan

CT 228 Country	
Guadeloupe	Turks & Caicos Islands
Guam	Tokelau
Greece	Tonga
Guatemala	Togo
Guinea	Sao Tome & Principe
Guyana	Tunisia
Gaza Strip	East Timor
Haiti	Turkey
McDonald Island	Tuvalu
Hong Kong	Taiwan
Heard Island & McDonald Islands	Turkmenistan
Honduras	Tanzania
Howland Island	Undeclared
Croatia	Uganda
Hungary	United Kingdom (England)
Iceland	Ukraine
Indonesia	United States
Man, Isle of	Burkina Faso
India	Uruguay
British Indian Ocean	Uzbekistan
Clipperton Island	St Vincent & the Grenadines
Iran	Venezuela
Israel	Virgin Islands (UK)
Italy	Vietnam
Cote d'Ivoire (Ivory Coast)	Virgin Islands (US)
Iraq	Vatican City
Japan	Namibia
Jersey	West Bank
Jamaica	Wallis & Futuna
Jan Mayen	Western Sahara
Jordan	Wake Island
Johnston Atoll	Western Samoa
Juan De Nova Island	Swaziland
Kenya	Yugoslavia
Kyrgyzstan	Yemen
Korea (North)	Zambia
Kingman Reef	Lybia
Kiribati	Zimbabwe
Republic of Korea (South)	Unknown

CT 225 Ethnic Code
White, Non-Hispanic
Hispanic
Other Asian/Pacific Islander
American Indian/Alaska Native
Filipino
Black
Chinese
Cambodian
Japanese
Korean
Samoan
Asian Indian
Hawaiian
Guamanian
Laotian
Vietnamese

CT 51 Confidentiality Type
Adoptions Assistance
CWS AAP Mask Address
Domestic Violence
Employee/Employee Relative
Foster Care
High Profile
Human Trafficking
CWS Foster Care/KinGap Mask Address
Minor Consent
CWS Sealed Mask Address
CWS Sensitive Mask Address

CT 1082 Flag Type
Federal
State
County
Court Case
Study
Civil Rights
Error Prone and High Risk

CT 277 Income Category
Earnings
Government Settlements, Payments, Programs
Disability
Social Security
Railroad
Educational, Student
Child/Spousal Support
Income In-Kind - Earned
Veterans
Insurance, Legal Settlement, Third Party
Interest, Dividends, Investments
Loans, Gifts, Contributions
Miscellaneous
Native American
Reimbursements
Retirements, Pensions, Annuities
Room and Board
Royalties, Residuals
Unemployment
Work Study, Training
Rental of Land, Buildings, Personal Property
IHSS
Income In-Kind - Unearned
Military Dependent

CT 186 Income Type Code	
Agent Orange	Disability - Partial
Alaskan Native Claims Act	Student Services Program
ABLE/CalABLE Non-Qualified Withdrawal	GI Bill/VEAP
Blood/Plasma	Work Therapy
Relocation Assistance - Govt.	Victims of Crimes
Cash Gift/Inheritance	Victims of Nazi Persecution
Census Earnings - Temporary	Winnings
Census Earnings - Temporary	Worker's Comp - Temporary
Census Earnings - Temporary	Worker's Comp - Permanent
Census Earnings - Permanent	Food - Unearned
Contribution - Needs Based	Food - Earned
Contribution - Non Needs Based	Clothing - Unearned
Contribution - UAM In CF HH	Clothing - Earned
Child Support - Direct	Housing - Unearned

CT 186 Income Type Code	
Child Support - Excess	Housing - Earned
Child Support - Disregard	Nutrition Assistance Program
Spousal Support - Direct	Family Subsistence Allowance
College Work Study	Rental Income - Manages Property Less Than 20 Hours/Week
College Work Study	GI Bill - Non-Educational
Deferred Comp	GI Bill - Non-Educational
Disaster/Emergency Assistance	GI Bill - Educational
Employee - Temporary	VEAP
Employee - Permanent	Disability - Total
Private - Temporary	Displaced Workers
Private - Permanent	AmeriCorps*VISTA Joined while on aid
SDI	Youth Corps
Survivor Benefits	Retirement - Military
Bonus, Commission	Contribution - UAM Not In CF HH
Self Employment	Adoption Assistance Subsidy
Salary, Wages	Earnings Anticipated w/Diversion
Termination/Severance Pay	Income from American Indian or Alaska Native Sources
Tips	AmeriCorps*State
Vacation Pay	AmeriCorps*National
Executive Volunteer Programs	AmeriCorps*Civilian Community Corps
Spousal Support - Disregard	Child Support - Through LCSA
HUD Payments	Child & Spousal Support - Through LCSA
Interest, Dividends, Investments	Spousal Support - Through LCSA
Utilities - Unearned	Awards/Scholarships
Utilities - Earned	Interest, Dividends, Investments - From Non-Countable Property
JTPA/WIA - Earned	Disaster Unemployment Assistance-DUA
JTPA/WIA - Incentive or Training Allowance	Survivors Benefit
Sale of Notes, Contracts, Trust Deeds	Restaurant Meal Allowance
Relocation Assistance - Private	Advance Payment
Job Corps	Wages - Caregiver For Spouse/Minor
Jury Duty - Per Diem	Caregiver Wages - Other
Jury Duty - Mileage	UIB Stimulus Payment
Payments for Lost, Stolen, Damaged Property	Tribal Gaming Disbursements
Payments for Personal Damages	Reverse Annuity Mortgage
Loans Which Must be Repaid	LTC Indemnity/Per Diem
Life or Burial Insurance	AmeriCorps*VISTA Joined before on aid

CT 186 Income Type Code	
Low Income Energy Assistance	Capital Gains
Leases/Trusts of Individual Land	Other
Leases/Trusts of Tribal Land	Cancelled Debts
Federal Per Capita or Interest	Military Income
Rental Income - Manages Property at Least 20 Hours/Week	Deemed Sponsor Income
Prison Release Funds - Transition	Austrian Other Payments
Prison Release Funds - Earnings	Austrian Social Insurance Payments
Radiation Exposure	Combat Zone Pay
Voc Rehab - Training Allowance	Community Services
Licensed	DHS/DSS Advisory Group
Reimbursement of Expenses	Foreign Pension
Unlicensed	GR Other
Repayment of Bona Fide Loan	Independent Living Programs (ILP)
Japanese/Filipino Restitution	Manpower Training Allowance
Govt. Employee	Modified Grant Diversion
Private	NCSA Title I Earnings
Railroad - Disability	Other Unearned All
Railroad - Retirement	SCORE or ACE
Railroad - Survivors	Senior Citizens Rent Assistance
Royalties, Residuals	Senior Citizen Volunteer
Ricky Ray Hemophilia	Services-Wage-Based Community
Senior Citizen Volunteers	Strike Benefits Earned
Social Security Disability	Strike Benefits Unearned
Social Security Retirement	Child/Spousal Support DA-Current Retained
Social Security Survivors	Child/Spousal Support DA-Prior Disregard
Strike Pay/Benefits	Farming or Fishing income
Title IV, Other Federal	Foreign Earned Income (taxable and non-taxable), Form 2555
Grants, Loans - Needs Based	Cal Grant A
Grants, Loans - Non Needs Based	Cal Grant A - TANF
Tax Refunds/Rebates/Credits	Cal Grant B
UIB	Cal Grant B - TANF
Vendor - Other than Wages	Cal Grant B Access
Aid and Attendance	Cal Grant C
Disabled Survivor Benefits	Interest income (taxable and non-taxable), 1099-INT
Disabled Survivor Benefits	Mortgage/Deed Holder
Disability - Partial	Other gains (or losses), Form 4797
	Ordinary/qualified dividends, 1099-DIV

CT 186 Income Type Code	
	Promissory Note Holder
	Pandemic Unemployment Compensation
	Refugee Resettlement Program
	Taxable refunds, credits, or offsets of state/local income taxes

CT 199 Frequency
Weekly
Every Other Week
Twice a Month
Monthly
Quarterly
Semi Annually
Annually
Period of Months
Annual Contract
Daily
Hourly
Irregular/Infrequent

CT 2159 Income Category
Actuals (TMC / Pickle)
All
Cash / CalFresh
Medi-Cal

CT 2160 FC Exemption Reason
County is Payee
FC/KG Child's Parent is Payee
Student FT/PT
Income Earned Through Independent Living Plan
Income Paid to Rep Payee
Unavailable

CT 967 Suffix
I
II
III
IV

V
VI
VII
VIII
IX
X
Jr.
Sr.

CT 145 Language
American Sign Language
Spanish
English
Japanese
Korean
Tagalog, Filipino
Other Non-English
Other Chinese Language
Other Sign Language
Cantonese (Chinese)
Mandarin (Chinese)
Cambodian
Armenian
Ilocano
Mien
Hmong
Lao
Turkish
Hebrew
French
Polish
Russian
Portuguese
Italian
Arabic
Samoan
Thai
Farsi
Vietnamese
Bengali
Hindi

German
Punjabi
Assyrian
Afghani
Persian
Romanian
Urdu
Serbian
Bosnian
Croatian
Egyptian
Amharic
Aramaic
Greek
Indonesian

California Statewide Automated Welfare System

Design Document

CA-214978

Add WTW 6010 – WTW Appointment Letter (10/20) in threshold languages

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

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

Table of Contents

1 OVERVIEW

SCR CA-214979 added the WTW 6010 – WTW Appointment Letter (10/20) state form to the CalSAWS system in English and Spanish only. This SCR will add the WTW 6010 – WTW Appointment Letter (10/20) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the WTW 6010 – WTW Appointment Letter (10/20) State form is implemented in the CalSAWS in English and Spanish.

1.2 Requests

Implement State Form WTW 6010 – WTW Appointment Letter (10/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form WTW 6010 – WTW Appointment Letter (10/20) in the 11 supported threshold languages.

1.4 Assumptions

1. Form Population logic, parameters, print, Mailing and barcode requirements for threshold WTW 6010 form remains the same as existing WTW 6010 form English and Spanish forms.
2. All the Requirements for the WTW 6010 Threshold forms will be the same as the existing WTW 6010 English version form.

2   RECOMMENDATIONS

2.1   Add Form WTW 6010 (10/20) in threshold languages

2.1.1   Overview

This SCR will add the State form WTW 6010 – WTW Appointment Letter (10/20) to the CalSAWS system in the remaining threshold languages.

State Form: WTW 6010 (10/20)

Programs: Welfare To Work, REP

Attached Forms: None

Forms Category: Appointment Letter

Template Repository Visibility: All Counties

Languages:

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

Translation is provided once to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.

2.1.2   Create Form WTW 6010 XDPs in threshold languages

1. Add WTW 6010 – WTW Appointment Letter (10/20) form to CalSAWS Template Repository in Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

   Form Header: CalSAWS Standard Header in Threshold Language
   Form Title (Document List Page Displayed Name): WTW Appointment Letter
   Template Description: This form is used to discuss any of the below situations with the WTW participant. To complete a WTW Appraisal/Orientation. To decide the next WTW assignment and negotiate the next activity agreement. To discuss the WTW assignment. To discuss recent employment and its effect on WTW Services. To discuss a recent move and how it may affect the WTW assignment and supportive services. To discuss a situation which may result in an exemption from participation. To discuss a late or missing verification of good cause, exemption, or employment. To complete a WTW Assessment/Reassessment. Other.
   Form Number: WTW 6010
   Include NA Back 9: No
   Imaging Form Name: WTW Appointment Letter
   Imaging Document Type: Appointment Letter

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

2. Add Form WTW 6010 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. The Print Options and Mailing Requirements for Form WTW 6010 will carry over to the rest of the threshold languages.

4. Currently Customer Appointment Detail page generates WTW 6010 form in English and Spanish languages. Update Customer Appointment Detail page functionality to generate form WTW 6010 in newly added threshold languages. WTW 6010 Form trigger conditions, form population and other requirements remains unchanged with this SCR and are same as WTW 6010 form in English.

5. Update Dynamic Form generation batch jobs (PB00R201- PB00R320) to generate WTW 6010 form in newly added threshold languages Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.

   Tech Note: Update CT942_ 094

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	WTW 6010 Threshold Languages	WTW_6010_Arabic.pdf WTW_6010_Armenian.pdf WTW_6010_Cambodian.pdf WTW_6010_Chinese.pdf WTW_6010_Farsi.pdf WTW_6010_Hmong.pdf WTW_6010_Korean.pdf WTW_6010_Lao.pdf WTW_6010_Russian.pdf WTW_6010_Tagalog.pdf WTW_6010_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2572	The CONTRACTOR shall implement new State form WTW 6010 – WTW Appointment Letter in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information. 2) This form replaces the existing GN 6010 - GAIN/REP Appointment Letter. Hide the GN 6010 in	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.	With SCR CA-214978, State Form WTW 6010 – WTW Appointment Letter (10/20) will be added to the CalSAWS in the threshold languages.

the Template Repository for all counties. The CONTRACTOR shall update the online trigger for the GN 6010 on the Customer Appointment Detail page to trigger the WTW 6010 instead for all 58 counties. The CONTRACTOR shall update the batch trigger for the GN 6010 to instead trigger the WTW 6010. This job runs for Los Angeles County only.		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214986

Add WTW 6178 – Cure Sanction Appointment
Letter (10/20) in threshold languages

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

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

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1 OVERVIEW

SCR CA-214987 added the WTW 6178 – Cure Sanction Appointment Letter (10/20) state form to the CalSAWS system in English and Spanish only. This SCR will add the WTW 6178 – Cure Sanction Appointment Letter (10/20) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the WTW 6178 – Cure Sanction Appointment Letter (10/20) State form is implemented in the CalSAWS in English and Spanish.

1.2 Requests

Implement State Form WTW 6178 – Cure Sanction Appointment Letter (10/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form WTW 6178 – Cure Sanction Appointment Letter (10/20) in the 11 supported threshold languages.

1.4 Assumptions

1. Form Population logic, parameters, print, Mailing and barcode requirements for threshold WTW 6178 (10/20) form remains the same as existing WTW 6178 (10/20) form English and Spanish forms.
2. All the Requirements for the WTW 6178 (10/20) Threshold forms will be the same as the existing WTW 6178 (10/20) English version form.

2   RECOMMENDATIONS

2.1   Add Form WTW 6178 (10/20) in threshold languages

2.1.1   Overview

This SCR will add the State form WTW 6178 – Cure Sanction Appointment Letter (10/20) to the CalSAWS system in the remaining threshold languages.

State Form: WTW 6178 (10/20)

Programs: Welfare To Work, REP

Attached Forms: None

Forms Category: Appointment Letter

Template Repository Visibility: All Counties

Languages:

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

Translation is provided once to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.

2.1.2   Create Form WTW 6178 XDPs in threshold languages

1. Add WTW 6178 – Cure Sanction Appointment Letter (10/20) form to CalSAWS Template Repository in Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

    Form Header: CalSAWS Standard Header in Threshold Language
    Form Title (Document List Page Displayed Name): Cure Sanction Appointment Letter
    Template Description: This form is used to notify the participant that they have a Cure Sanction Appointment. The form identifies the Date, Time, and Place, as well as other information about WTW and its benefits to the client.
    Form Number: WTW 6178
    Include NA Back 9: No
    Imaging Form Name: Cure Sanction Appointment Letter
    Imaging Document Type: Welfare to Work
    Form Mockups/Examples: See Supporting Documents #1 for PDF Mockups

2. Add Form WTW 6178 (10/20) to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. The Print Options and Mailing Requirements for Form WTW 6178 will carry over to the rest of the threshold languages.

4. Currently Customer Appointment Detail page generates WTW 6178 form in English and Spanish languages. Update Customer Appointment Detail page functionality to generate form WTW 6178 in newly added threshold languages. WTW 6178 Form trigger conditions, form population and other requirements remains unchanged with this SCR and are same as WTW 6178 form in English.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	WTW 6178 Threshold Languages	WTW_6178_Arabic.pdf WTW_6178_Armenian.pdf WTW_6178_Cambodian.pdf WTW_6178_Chinese.pdf WTW_6178_Farsi.pdf WTW_6178_Hmong.pdf WTW_6178_Korean.pdf WTW_6178_Lao.pdf WTW_6178_Russian.pdf WTW_6178_Tagalog.pdf WTW_6178_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2576	The CONTRACTOR shall implement new State form WTW 6178 – Cure Sanction Appointment Letter in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information. 2) This form replaces the existing GN 6178 - Post Financial Sanction Appointment Letter.	1. Estimate is for updating the form in English and Spanish along with updating the online trigger. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	With SCR CA-214986, State Form WTW 6178 – Cure Sanction Appointment Letter (10/20) will be added to the CalSAWS in the threshold languages.

Hide the GN 6178 in the Template Repository for all counties.		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215001 | DDID 2583

Add WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) in threshold languages

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

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

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1 OVERVIEW

SCR CA-215000 added the WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) State form to the CalSAWS system in English and Spanish only. This SCR will add the WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the WTW 111 State form is implemented in the CalSAWS in English and Spanish with the version date of (09/2020).

1.2 Requests

Implement State Form WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) 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 WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) in the 11 supported threshold languages.

1.4 Assumptions

1. The WTW 111 form in threshold languages will have CalSAWS Standard Header in respective threshold language.
2. Form Population logic, parameters, print, Mailing and barcode requirements for threshold WTW 111 form remains the same as existing WTW 111 form English and Spanish forms.
3. All the Requirements for the WTW 111 threshold forms will be the same as the existing WTW 111 English version form.

2 RECOMMENDATIONS

2.1 Add Form WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) in threshold languages

2.1.1 Overview

This SCR will add the State form WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) to the CalSAWS system in the remaining threshold languages.

State Form: WTW 111

Programs: WTW/REP Programs only

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

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

Translation is provided once to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.

2.1.2 Create Form WTW 111 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

   Form Title: Work Experience And/Or Community Services Hours of Participation Notice

   Form Template Description: Notice to Customers that they are required to participate in unsubsidized employment and/or Community Services. This form can be generated from the WEX/Community Service Page.

   Form Number: WTW 111

   Include NA Back 9: No

   Imaging Form Name: WEX/Comm Service Hours of Partic. Notif

   Imaging Document Type: Welfare to Work (WTW)

   Form Mockup/Example: See Supporting Document #1

2. Add Form WTW 111 to the Template Repository in the rest of the threshold languages for all Counties.

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

3. The Print Options and Mailing Requirements for Form WTW 111 will carry over to the rest of the threshold languages.

4. 'Generate Form' button on WEX/CS Worksheet Detail page currently generates form in WTW 111 English and Spanish languages. Update 'Generate Form' button on WEX/CS Worksheet Detail page functionality to generate form WTW 111 in newly added threshold languages. WTW 111 Form population and other requirements remains unchanged with this SCR and are same as WTW 111 form in English.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	WTW 111 Threshold Languages	WTW_111_Arabic.pdf WTW_111_Armenian.pdf WTW_111_Cambodian.pdf WTW_111_Chinese.pdf WTW_111_Farsi.pdf WTW_111_Hmong.pdf WTW_111_Korean.pdf WTW_111_Lao.pdf WTW_111_Russian.pdf WTW_111_Tagalog.pdf WTW_111_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2583	The CONTRACTOR shall add State Form WTW 111 - Work Experience And/Or Community Services Hours of Participation Notice to the CalSAWS Software.	1. Estimate is for migrating the form in English and Spanish along with adding an online trigger. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created.	With SCR CA-215001, WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) is added to the CalSAWS in threshold languages.

		Consortium staff will be modifying or creating FDDs.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215003 | DDID 2584

Add WTW 112 - Care of a Household Member Verification form version (03/21) in threshold languages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/23/2021	1.0	Initial Draft	Sureshnaidu Mullaguri
05/10/2021	1.1	Revision	Sureshnaidu Mullaguri

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1   OVERVIEW

SCR CA-215002 added the WTW 112 - Care of a Household Member Verification form version (09/20) State form to the CalSAWS system in English and Spanish only. This SCR will Update State Form WTW 112 - Care of a Household Member Verification form version from (09/20) to (03/21) in English and Spanish languages and add the WTW 112 - Care of a Household Member Verification form version (03/21) form to CalSAWS in the remaining supported threshold languages.

1.1   Current Design

Currently the WTW 112 State form is implemented in the CalSAWS in English and Spanish with the version date of (09/2020).

1.2   Requests

Update State Form WTW 112 - Care of a Household Member Verification form version from (09/20) to (03/21) in English and Spanish languages and Implement State Form WTW 112 - Care of a Household Member Verification form version (03/21) 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

1. Update State Form WTW 112 - Care of a Household Member Verification form version from (09/20) to (03/21) in English and Spanish languages
2. Add State Form WTW 112 - Care of a Household Member Verification form version (03/21) in the 11 supported threshold languages.

1.4   Assumptions

1. The WTW 112 form in threshold languages will have CalSAWS Standard Header in respective threshold language.
2. Form Population logic, parameters, print, Mailing and barcode requirements for threshold WTW 112 form remains the same as existing WTW 112 form English and Spanish forms.
3. All the Requirements for the WTW 112 threshold forms will be the same as the existing WTW 112 English version form.
4. All Fields are editable unless specified.

2 RECOMMENDATIONS

2.1 Add Form WTW 112 - Care of a Household Member Verification form version (03/21) in threshold languages

2.1.1 Overview

This SCR will update State Form WTW 112 - Care of a Household Member Verification form version from (09/20) to (03/21) in English and Spanish languages and add the State form WTW 112 - Care of a Household Member Verification form version (03/21) to the CalSAWS system in the remaining threshold languages.

State Form: WTW 112 (03/21)

Programs: CalWORKs, Welfare to Work

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

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

Translation is provided once to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.

2.1.2 WTW 112 XDP Changes

1. Update State Form WTW 112 - Care of a Household Member Verification form version from (09/20) to (03/21) in English and Spanish languages. Please see the Supporting Documents #1 for details.

    Form Header: LRS/CalSAWS Standard Header

    Form Title: Care of a Household Member Verification

    Template Description: Used to verify that an individual is exempt from work registration due to caring for a disabled household member.

    Form Number: WTW 112

    Include NA Back 9: No

    Imaging Form Name: Care of a Household Member Verif

    Imaging Document Type: Customer Verification Forms

    Form Mockup/Example: See Supporting Documents #1

2. The newly added threshold languages will be made available in the Template Repository. Please see the Supporting Documents #2 for details.

> **Form Header:** LRS/CalSAWS Standard Header in threshold languages
>
> **Form Title:** Care of a Household Member Verification
>
> **Template Description:** Used to verify that an individual is exempt from work registration due to caring for a disabled household member.
>
> **Form Number:** WTW 112
>
> **Include NA Back 9:** No
>
> **Imaging Form Name:** Care of a Household Member Verif
>
> **Imaging Document Type:** Customer Verification Forms
>
> **Form Mockup/Example:** See Supporting Documents #2

3. Add Form WTW 112 to the Template Repository in the rest of the threshold languages for all Counties.

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

4. The Print Options and Mailing Requirements for Form WTW 112 will carry over to the rest of the threshold languages.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	WTW 112 English and Spanish Languages	WTW 112_English.pdf WTW 112_Spanish.pdf
2	Correspondence	WTW 112 Threshold Languages	WTW_112_Arabic.pdf WTW_112_Armenian.pdf WTW_112_Cambodian.pdf WTW_112_Chinese.pdf WTW_112_Farsi.pdf WTW_112_Hmong.pdf WTW_112_Korean.pdf WTW_112_Lao.pdf WTW_112_Russian.pdf WTW_112_Tagalog.pdf WTW_112_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2584	Revised requirement via App Dev Lead Meeting on October 6, 2020: The CONTRACTOR shall add State Form WTW 112 - Care of a Household Member Verification to the CalSAWS Software. Original requirement from CalSAWS DD&I	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.	With CA-215003, State form WTW 112 (03/21) - Care of a Household Member Verification will be added to CalSAWS in all languages.

SOR: The CONTRACTOR shall migrate the PLAN 112 CIV - Care of a Household Member Verification to the CalSAWS Software with the following updates: 1) Add the CalSAWS standard header information 2) Update "Social Security Number" to "Last four digits of Social Security Number" 3) Remove the sentence "If YES, explain the condition: <text line>" 4) Remove the sentence "Condition is expected to last until: <text line>" 5) Update form number from "PLAN 112 C-IV" to CalSAWS standard naming/numbering format 6) Update the "SEX" text box to be an editable field and remove the M and F and the circle from the text box labeled "SEX" 7) Relabel text box "Birth Date" to "DOB" 8) Remove the "AGES OF CHILDREN IN HOME" text box 9) Remove the sentence "Name of examined/household member" 10) Remove the text	Consortium staff will be modifying or creating FDDs.	

line "TO BE COMPLETED BY EXAMINING PHYSICIAN" 11) Update the last three lines of the "Certification" section of the "PLAN 112" to mirror "Section 3. PROVIDER CERTIFICATION" section of the CW 61- Authorization to Release Medical Information form		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215072

Add CW 108 - Child Immunization Status (10/2020) in threshold languages

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

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

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1 OVERVIEW

SCR CA-215073 added the CW 108 - Child Immunization Status (10/2020) State form to the CalSAWS system in English and Spanish only. This SCR will add the CW 108 - Child Immunization Status (10/2020) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the CW 108 - Child Immunization Status (10/2020) State form is implemented in the CalSAWS system in English and Spanish.

1.2 Requests

Implement State Form CW 108 - Child Immunization Status (10/2020) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form CW 108 - Child Immunization Status (10/2020) in the 11 supported threshold languages.

1.4 Assumptions

1. Form Population logic, parameters, print, Mailing and barcode requirements for threshold CW 108 form remains the same as existing CW 108 form English and Spanish forms.
2. All the Requirements for the CW 108 Threshold forms will be the same as the existing CW 108 English version form.

2   RECOMMENDATIONS

2.1   Add Form CW 108 (10/2020) in threshold languages

2.1.1   Overview

This SCR will add the State form CW 108 - Child Immunization Status (10/2020) to the CalSAWS system in the remaining threshold languages.

State Form: CW 108 (10/20)

Programs: CalWORKs

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

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

Translation is provided once to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.

2.1.2   Create Form CW 108 XDPs in threshold languages

1. Add CW 108 - Child Immunization Status (10/2020) form to CalSAWS Template Repository in Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

   Form Header: CalSAWS Standard Header in Threshold Language
   Form Title (Document List Page Displayed Name): Child Immunization Status
   Template Description: This form is used to indicate the necessary vaccinations for all children in the household who are under the age of 6.
   Form Number: CW 108
   Include NA Back 9: No
   Imaging Form Name: Child Immunization Status
   Imaging Document Type: Medical Reports/Records
   Form Mockups/Examples: See Supporting Documents #1 for PDF Mockups

2. Add Form CW 108 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. The Print Options and Mailing Requirements for Form CW 108 will carry over to the rest of the threshold languages.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 108 Threshold Languages	CW_108_Arabic.pdf CW_108_Armenian.pdf CW_108_Cambodian.pdf CW_108_Chinese.pdf CW_108_Farsi.pdf CW_108_Hmong.pdf CW_108_Korean.pdf CW_108_Lao.pdf CW_108_Russian.pdf CW_108_Tagalog.pdf CW_108_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2675	The CONTRACTOR shall implement new State form CW 108 – Child Immunization Status in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information. 2) This form replaces the existing IMM STATUS - Children Immunization Status. Hide the IMM STATUS in	1. Estimate is for updating 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.	With SCR CA-215072, State Form CW 108 – Child Immunization Status will be added to the CalSAWS in the threshold languages.

the Template Repository for all counties.		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215075

Add CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) in threshold languages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/29/2021	0.1	Initial Draft	Sureshnaidu Mullaguri

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1 OVERVIEW

SCR CA-215074 added the CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) State form to the CalSAWS system in English and Spanish only. This SCR will add the CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) State form is implemented in the CalSAWS system in English and Spanish.

1.2 Requests

Implement State Form CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) in the 11 supported threshold languages.

1.4 Assumptions

1. Form Population logic, parameters, print, Mailing and barcode requirements for threshold CW 784 form remains the same as existing CW 784 form English and Spanish forms.
2. All the Requirements for the CW 784 Threshold forms will be the same as the existing CW 784 English version form.

2 RECOMMENDATIONS

2.1 Add Form CW 784 (11/2020) in threshold languages

2.1.1 Overview

This SCR will add the State form CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) to the CalSAWS system in the remaining threshold languages.

State Form: CW 784

Programs: All

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

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

Translation is provided once to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.

2.1.2 Create Form CW 784 XDPs in threshold languages

1. Add CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) form to CalSAWS Template Repository in Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

    Form Header: CalSAWS Standard Header

    Form Title: Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant

    Form Template Description: This form is used by counties as an affidavit to obtain duplicate of lost/stolen/destroyed warrant for customers.

    Form Number: CW 784

    Include NA Back 9: No

    Imaging Form Name: Affidavit Obtain Duplicate Lost Warrant

    Imaging Document Type: Fiscal

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

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

3. Add Form CW 784 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

4. The Print Options, Barcode Options and Mailing Requirements for Form CW 784 will carry over to the rest of the threshold languages.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 784 Threshold Languages	CW_784_Arabic.pdf CW_784_Armenian.pdf CW_784_Cambodian.pdf CW_784_Chinese.pdf CW_784_Farsi.pdf CW_784_Hmong.pdf CW_784_Korean.pdf CW_784_Lao.pdf CW_784_Russian.pdf CW_784_Tagalog.pdf CW_784_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2620	The CONTRACTOR shall add State form CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant 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 SCR CA-215075, State Form CW 784 – Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) form will be added to the CalSAWS in the threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215100

DDID 2633: Add GEN 853 – Sworn Statement (10/20) in threshold languages

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Maria Jensen
	Reviewed By	Raj Devidi

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/13/2021	0.1	Initial Draft	Maria Jensen
04/26/2021	0.2	QA Comments fixes: Added Assumption	Maria Jensen

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1 OVERVIEW

SCR CA-215101 added the GEN 853 - Sworn Statement (10/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the GEN 853 - Sworn Statement (10/20) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the GEN 853 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

1.2 Requests

Implement State Form GEN 853 - Sworn Statement (10/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form GEN 853 - Sworn Statement (10/20) in the 11 supported threshold languages.

1.4 Assumptions

Form Population logic, Document Parameters, Print Options, Mailing Requirements and Barcode Options for GEN 853 threshold language forms remain the same as existing GEN 853 English and Spanish forms.

2 RECOMMENDATIONS

2.1 Add Form GEN 853 - Sworn Statement in threshold languages

2.1.1 Overview

This SCR will add the State form GEN 853 – Sworn Statement (revision 10/20) to the CalSAWS system in the remaining threshold languages.

State Form: GEN 853 (10/20)

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

Attached Forms: None

Forms Category: Forms

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 853 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): Sworn Statement
   Template Description: This form is utilized to obtain a sworn statement from the customers.
   Form Number: GEN 853
   Include NA Back 9: No
   Imaging Form Name: Sworn Statement
   Imaging Document Type: Sworn Statements
   Form Mockups/Examples: See Supporting Documents #1 for PDF Mockups

2. Add Form GEN 853 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. The Print Options and Mailing Requirements for Form GEN 853 will carry over to the rest of the threshold languages.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	GEN 853 Threshold Languages	GEN_853_Arabic.pdf GEN_853_Armenian.pdf GEN_853_Cambodian.pdf GEN_853_Chinese.pdf GEN_853_Farsi.pdf GEN_853_Hmong.pdf GEN_853_Korean.pdf GEN_853_Lao.pdf GEN_853_Russian.pdf GEN_853_Tagalog.pdf GEN_853_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2633	The CONTRACTOR shall implement new State form GEN 853 – Sworn Statement in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information. 2) This form replaces the existing PA 853 – Affidavit. Hide the PA 853 in the Template Repository for all counties.	1. Estimate is for updating 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.	With SCR CA-215100, form GEN 853 – Sworn Statement will be added to the CalSAWS system in the 11 supported threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215142

DDID 2654: Add CW 1725 - School Attendance/Enrollment Verification (10/20) in threshold languages

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Maria Jensen
	Reviewed By	Suresh Mullaguri

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/13/2021	0.1	Initial Draft	Maria Jensen
04/23/2021	0.2	QA Comments fixes: Added Header specification Added Barcode mention	Maria Jensen
05/21/2021	0.3	Removed mention of other form	Maria Jensen

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1 OVERVIEW

SCR CA-215143 added the CW 1725 - School Attendance/Enrollment Verification (10/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the CW 1725 - School Attendance/Enrollment Verification (10/20) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the CW 1725 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

1.2 Requests

Implement State Form CW 1725 - School Attendance/Enrollment Verification (10/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form CW 1725 - School Attendance/Enrollment Verification (10/20) in the 11 supported threshold languages.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Add Form CW 1725 - School Attendance/Enrollment Verification in threshold languages

2.1.1 Overview

This SCR will add the State form CW 1725 – School Attendance/Enrollment Verification (revision 10/20) to the CalSAWS system in the remaining threshold languages.

State Form: CW 1725 (10/20)

Programs: CalWORKs, Refugee Cash Assistance

Attached Forms: None

Forms Category: Forms

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 CW 1725 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 in Threshold Language
   Form Title (Document List Page Displayed Name): School Attendance/Enrollment Verification
   Template Description: This form allows a parent/caregiver to a school-age child to authorize the school and the county to communicate regarding the child's attendance and/or enrollment.
   Form Number: CW 1725
   Include NA Back 9: No
   Imaging Form Name: School Attendance / Enrollment Verif
   Imaging Document Type: Education
   Form Mockups/Examples: See Supporting Documents #1 for PDF Mockups

2. Add Form CW 1725 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. The Barcode Options for Form CW 1725 will carry over to the rest of the threshold languages.

4. The Print Options and Mailing Requirements for Form CW 1725 will carry over to the rest of the threshold languages.

5. The Variable Population for Form CW 1725 will carry over to the rest of the threshold languages.

6. Update Dynamic Form generation batch jobs (PB00R201- PB00R320) to generate CW 1725 form in newly added threshold languages Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.

   Tech Note: Update CT942_109_PA1725

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 1725 Threshold Languages	CW_1725_Arabic.pdf CW_1725_Armenian.pdf CW_1725_Cambodian.pdf CW_1725_Chinese.pdf CW_1725_Farsi.pdf CW_1725_Hmong.pdf CW_1725_Korean.pdf CW_1725_Lao.pdf CW_1725_Russian.pdf CW_1725_Tagalog.pdf CW_1725_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2654	The CONTRACTOR shall implement New State form CW 1725 - School Attendance/Enrollment Verification in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information. 2) This form replaces the existing PA 1725 – School Attendance Enrollment Verification form. Hide the PA 1725 in the Template Repository for all counties. The CONTRACTOR shall update the batch trigger for the PA 1725 to trigger the CW 1725 instead, and the batch will run for all counties.	1. Estimate is for updating the form in English and Spanish along with updating the batch trigger. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	With SCR CA-215142, form CW 1725 – School Attendance/Enrollment Verification will be added to the CalSAWS system in the 11 supported threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215149

DDID 2657: Add CW 107 - Immunization Verification (10/20) in threshold languages

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Maria Jensen
	Reviewed By	Pramukh Karla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/16/2021	0.1	Initial Draft	Maria Jensen
04/26/2021	0.2	QA Comments fixes: Added Header specification Added Assumption	Maria Jensen

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1 OVERVIEW

SCR CA-215148 added the CW 107 - Immunization Verification (10/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the CW 107 - Immunization Verification (10/20) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the CW 107 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

1.2 Requests

Implement State Form CW 107 - Immunization Verification (10/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form CW 107 - Immunization Verification (10/20) in the 11 supported threshold languages.

1.4 Assumptions

1. CW 107 Form must be used with the CW 2209 - Immunization Good Cause Request Form.
2. Form Population logic, Document Parameters, Print Options, Mailing Requirements and Barcode Options for CW 107 threshold language forms remain the same as existing CW 107 English and Spanish forms.

2 RECOMMENDATIONS

2.1 Add Form CW 107 - Immunization Verification in threshold languages

2.1.1 Overview

This SCR will add the State form CW 107 - Immunization Verification (revision 10/20) to the CalSAWS system in the remaining threshold languages.

State Form: CW 107 (10/20)

Programs: CalWORKs

Attached Forms: None

Forms Category: Forms

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 CW 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 in Threshold Language
   Form Title (Document List Page Displayed Name): Immunization Verification
   Template Description: Form for documenting the immunizations.
   Form Number: CW 107
   Include NA Back 9: No
   Imaging Form Name: Immunization Verif
   Imaging Document Type: Medical Reports/Records
   Form Mockups/Examples: See Supporting Documents #1 for PDF Mockups

2. Add Form CW 107 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

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

4. The Variable Population for Form CW 107 will carry over to the rest of the threshold languages.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 107 Threshold Languages	CW_107_Arabic.pdf CW_107_Armenian.pdf CW_107_Cambodian.pdf CW_107_Chinese.pdf CW_107_Farsi.pdf CW_107_Hmong.pdf CW_107_Korean.pdf CW_107_Lao.pdf CW_107_Russian.pdf CW_107_Tagalog.pdf CW_107_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2657	The CONTRACTOR shall implement the State form CW 107 – Immunization Verification in the CalSAWS Software with the CalSAWS standard header information.	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.	With SCR CA-215149, form CW 107 - Immunization Verification will be added to the CalSAWS system in the 11 supported threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215158

DDID 2662: Add CF 6177 - CalFresh Student Exemption Screening Form (10/20) in threshold languages

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Maria Jensen
	Reviewed By	Raj Devidi

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/16/2021	0.1	Initial Draft	Maria Jensen
05/04/2021	0.2	QA Comments fixes: Added Form Header specification Added Assumption regarding original form features carry over Added Assumption regarding partial English text	Maria Jensen

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1 OVERVIEW

SCR CA-215159 added the CF 6177 - CalFresh Student Exemption Screening Form (10/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the CF 6177 - CalFresh Student Exemption Screening Form (10/20) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the CF 6177 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

1.2 Requests

Implement State Form CF 6177 - CalFresh Student Exemption Screening Form (10/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.3 Overview of Recommendations

Add State Form CF 6177 - CalFresh Student Exemption Screening Form (10/20) in the 11 supported threshold languages.

1.4 Assumptions

1. Form Variable Population logic, Document Parameters, Print Options, Mailing Requirements and Barcode Options for CF 6177 threshold language forms remain the same as existing CF 6177 English and Spanish forms.
2. Regarding partial English text in threshold language forms, per CDSS direction the forms will be left translated as-is.

2 RECOMMENDATIONS

2.1 Add Form CF 6177 - CalFresh Student Exemption Screening Form in threshold languages

2.1.1 Overview

This SCR will add the State form CF 6177 - CalFresh Student Exemption Screening Form (revision 10/20) to the CalSAWS system in the remaining threshold languages.

State Form: CF 6177 (10/20)

Programs: CalFresh

Attached Forms: None

Forms Category: Forms

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 CF 6177 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 in Threshold Language
   Form Title (Document List Page Displayed Name): CalFresh Student Exemption Screening Form
   Template Description: CF 6177 Form is used to check if the participant is eligible for exemption from the CalFresh student eligibility rule.
   Form Number: CF 6177
   Include NA Back 9: No
   Imaging Form Name: CF Student Exemption Screening
   Imaging Document Type: Education
   Form Mockups/Examples: See Supporting Documents #1 for PDF Mockups

2. Add Form CF 6177 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. The Print Options and Mailing Requirements for Form CF 6177 will carry over to the rest of the threshold languages.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CF 6177 Threshold Languages	CF_6177_Arabic.pdf CF_6177_Armenian.pdf CF_6177_Cambodian.pdf CF_6177_Chinese.pdf CF_6177_Farsi.pdf CF_6177_Hmong.pdf CF_6177_Korean.pdf CF_6177_Lao.pdf CF_6177_Russian.pdf CF_6177_Tagalog.pdf CF_6177_Vietnamese.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2662	The CONTRACTOR shall implement new State form CF 6177 - CalFresh Student Exemption Screening Form in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information. 2) This form replaces the existing CF 6177 – CalFresh Student Exemption Checklist. Hide the existing CF 6177 in the Template Repository for all counties.	1. Estimate is for updating 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.	With SCR CA-215158, form CF 6177 - CalFresh Student Exemption Screening Form will be added to the CalSAWS system in the 11 supported threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215664

GA/GR Employment Services Phase 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Taylor Fitzhugh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/01/2021	1.0	Initial Draft	Taylor Fitzhugh

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1 OVERVIEW

This SCR is updating the Employment Services program solution for the General Assistance/General Relief programs.

1.1 Current Design

Currently, the system has only one employment services program for the Los Angeles County General Assistance/General Relief solution. Activities are associated to the Employment Services programs.

1.2 Requests

The current GROW program functionality is specific to Los Angeles County. A new Employment Services program will be created to support the needs of the other 57 counties.

1.3 Overview of Recommendations

1. Add a new Employment Services program.
2. Add activities to support the new Employment Services program

1.4 Assumptions

1. The changes within this SCR will not impact LA county rules, unless explicitly specified.
2. The employment services program will be hidden for each county until that county migrates.

2 RECOMMENDATIONS

2.1 Program Detail

2.1.1 Overview

The "Program Detail" page is used to add new programs to an existing case.

2.1.2 Program Detail Mockup

Program Detail

❋- Indicates required fields
Select Program: ❋
[GA/GR Employment Services ▼] [Go]

Figure 2.1.1.1 – Program Detail

2.1.3 Description of Changes

1. Add the "GA/GR Employment Services" program to the Select Program dropdown. A list of reference table values for the new program can be found in Appendix item A
2. Update the program filtering logic to only display the GROW program for a county supporting the General Assistance/General Relief program related to the "GA" program code.
3. Update the program filtering logic to only display the GA/GR Employment Services program for a county supporting the General Assistance/General Relief program related to the "GR" program code, General Assistance – Managed or General Assistance – Non-Managed programs.

   Note: Filtering logic updates will affect all pages currently utilizing the filtering logic. This list can be found in Appendix Item B.

2.1.4 Page Location
- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

2.1.5 Security Updates

No security updates.

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2.1.6 Page Mapping

Add page mappings for the new page title.

2.1.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

2.2 Case Summary

2.2.1 Overview

The "Case Summary" page displays a short amount of information for all programs and case members based on the view month. This page will be expanded to also display program information for the New GA/GR Employment Services program.

2.2.2 Case Summary Mockup

▼ GA/GR Employment Services				
Worker:		**Primary Applicant/Recipient:**	Doe, John 26M	
Worker ID:		**Language:**	English	
Program Status:	Deregistered	**Phone Number:**	(555)000-1234	
		Email:		
FBU:	1	**Payee:**	Doe, John 26M	
Name	**Role**	**Role Reason**	**Status**	**Status Reason**
Doe, John 26M	MEM		Deregistered	Conversion
				View Details

Figure 2.2.2.1 – Case Summary (GA/GR Employment Services)

2.2.3 Description of Changes

1. Worker: The name of the Staff assigned to the position that is assigned to the program.
2. Worker ID: The Identifier for the position. This field will be a hyperlink to the Worker Detail page for the selected position. When no staff is assigned to the position, this field will be blank.
3. Program Status: The status of the program on the given view Date.
4. FBU: The Family Budget Unit for the program.
5. Primary Applicant/Recipient: The primary applicant of the program on the given view date.
6. Language: The spoken Language of the primary Applicant.
7. Phone Number: The main phone number for the primary Applicant.

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8. Email: The email of the primary applicant.
9. Payee: The Payee of the program on the given view date.
10. Name: This field will list the names of the participant on the program. The name will be a hyperlink to the Program Person History page for the program person selected if the user has the 'PersonHistoryView' right associated to their profile.
11. Role: The Role code of the program person at the given view date.
12. Role Reason: The Reason the role was assigned at the given view date.
13. Status: The status of the participant in the program at the given view date.
14. Status Reason: The status reason of the participant's program status at the given view date.
15. View Details: This button will navigate to the GA/GR Employment Services Detail page for the associated program.

2.2.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** Case Summary

2.2.5 Security Updates

No security updates.

2.2.6 Page Mapping

Add page mappings for the new page title.

2.2.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

2.3 Employment Services Workload Inventory

2.3.1 Overview

The "Employment Services Workload Inventory" page displays a list of the Employment Services programs associated with the given worker. This page will be updated to include the GA/GR Employment Services program.

2.3.2 Employment Services Workload Inventory Mockup

Employment Services Workload Inventory

Worker ID:	Display Workload: ✳	Status Effective Date: ✳
19AS00008Y [Select]	03/31/2021	04/01/2021

Results per Page: [100 ▼] [Go]

Search Results Summary	Results 1 - 1 of 1

Total Assignments	
Cases	1
Program	1

Case Number	Name	Program	Program Status	Program Status Reason	Program Review Date	Activity	Activity Review Date	Benefit Program Status
① L000000	Doe, John 26M	GE	Deregistered	Conversion				Denied

Figure 2.3.2.1 – Employment Services

2.3.3 Description of Changes

1. Add the GA/GR Employment Services program to the existing page logic. The program will display as 'GE'.

2.3.4 Page Location

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

2.3.5 Security Updates

No security updates.

2.3.6 Page Mapping

No page mapping updates.

2.3.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

2.4 GA/GR Employment Services Detail

2.4.1 Overview

The "GA/GR Employment Services Detail" page displays the program information for a given month.

2.4.2 GA/GR Employment Services Detail Mockup

GA/GR Employment Services Detail

✱- Indicates required fields   [View History] [Edit] [Close]

Date: ✱
04/01/2021

Program Information		
Status: ✱	**Status Reason:**	**Source:** ✱
Pending		Other
Program Begins on: ✱		
03/01/2021		
Automatically Reassign When Activated:		
No		

Administrative Roles			
Name	**Administrative Role**	**Begin Date**	**End Date**
Doe, John 26M	Primary Applicant/Recipient	03/01/2021	

Program Persons				
Name	**Role**	**Role Reason**	**Status**	**Status Reason**
Doe, John 26M	MEM		Pending	

Secondary Assignment
Worker

[View History] [Edit] [Close]

Figure 2.4.2.1 – GA/GR Employment Services Detail (View Mode)

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GA/GR Employment Services Detail

*- Indicates required fields

[View History]   [Save and Return]   [Cancel]

Date: *
[07/01/2021] 📅 [View Date]

Program Information

Status: *	Status Reason:	Source: *
Pending		Other

Program Begins on: *
03/01/2021

Automatically Reassign When Activated:
[No ▾]

Administrative Roles

Name	Administrative Role	Begin Date	End Date	
Doe, John 26M	Primary Applicant/Recipient	03/01/2021		[Edit]
				[Add]

Program Persons

Name	Role	Role Reason	Status	Status Reason
Doe, John 26M	MEM		Pending	

Secondary Assignment

Worker
[Select]

[View History]   [Save and Return]   [Cancel]

Figure 2.4.2.2 – GA/GR Employment Services Detail (Edit Mode)

2.4.3 Description of Changes

1. View History button: This button will navigate the worker to the "GA/GR Employment Services Detail History" page.
2. Edit button: This button will refresh the page in 'Edit' mode. This button is only available in 'View' mode.
3. Close button: This button will navigate the worker to the Case Summary page. This button is only available in 'View' mode.
4. Save and Return button: Saves the changes that have been made to the "GA/GR Employment Services Detail" page and will navigate the worker to the Case Summary page. This button is only available in 'Edit' mode.

5. Cancel button: Returns the worker to the Case Summary page. This button is only available in 'Edit' mode.
6. Date: The view date of the program information This is a required field.
7. View Date button: Pressing this button will refresh the page with the program information as of the Date. This button is only available in 'Create'/'Edit' mode.
8. Program Information Section
    a. Status: Status of the program as of the Date. This field is required.
    b. Status Reason: Reason for the value displayed in the Status column.
    c. Source: Source of the Application that is tied to the Status as of the Date. This field is required.
    d. Program Begins On: Date of Application for the program that is tied to the Status as of the Date. This field is required.
    e. Automatically Reassign When Activated: This field will be a Yes/No dropdown that will let the current case be reassigned through an overnight batch job after being Activated through EDBC.
9. Administrative Roles section
    a. Name: Name of the person assigned to the Administrative Roles as of the Date.
    b. Administrative Role: Administrative Role that is assigned to the person in the Name column.
    c. Begin Date: Date that the person in the Name column was assigned to the Administrative Role.
    d. End Date: Date that the person in the Name column ended the Administrative Role.
    e. Edit button: Navigate the worker to the Administrative Role Detail page in 'Edit' mode. This button is only available in 'Create'/'Edit' mode.
    f. Add button - Navigate the worker to the Administrative Role Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.
10. Program Persons section
    a. Name: Name of the Program Person. This field will be a hyperlink that navigates the user to the GA/GR Employment Services Person Detail page in view mode.
    b. Role: Role of the Person as of the Date.
    c. Role Reason: Reason for the value displayed in the Role column.
    d. Status: Status of the Person as of the Date.
    e. Status Reason: Reason for the value displayed in the Status column.
11. Secondary Assignment section
    a. Worker: Name of the Worker that is assigned as a secondary assignment. Clicking on the Worker will navigate the worker to the Worker Detail page.

      b. Select button: Pressing button will navigate the worker to the Select Worker page to find a worker for the secondary assignment. This button is only available in 'Create'/'Edit' mode.

      c. Remove button: Pressing the button will Remove the secondary assignment. This button is only available in 'Create'/'Edit' mode.

2.4.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** Case Summary

2.4.5 Security Updates

No security updates.

2.4.6 Page Mapping

Add page mappings for the new page title.

2.4.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

2.5 GA/GR Employment Services Status List

2.5.1 Overview

The "GA/GR Employment Services Status List" page displays a list of the work registration records and program statuses related to a particular individual's GA/GR Employment Services program.

2.5.2 GA/GR Employment Services Status List Mockup

GA/GR Employment Services Status List

✱ - Indicates required fields

Display by Name: ✱

Display by Name: ✱	From:	To:	
Doe, John 26M ▾	☐ 📅	☐ 📅	View

▾ Work Registration

Status	Status Reason	Begin Date	End Date	
Unemployable	Administratively	08/01/2021		Edit / View History
Employable	Administratively	11/04/2019	07/31/2021	Edit / View History
				Add

▾ Program

Status	Status Reason	Begin Date	End Date
Deregistered	Conversion	08/01/2021	
Active	Conversion	11/04/2019	07/31/2021
			Add Status

Figure 2.5.2.1 – GA/GR Employment Services Status List

2.5.3 Description of Changes

1. The left-hand task navigation option will only display if the case has the GA/GR Employment Services program. This option will be restricted based on the "CustomerParticipationListView" security right.
2. Display by Name: This dropdown will list all valid Case Members.
3. From: This date will be the minimum date that any records displaying must be active for.
4. To: This date will be the maximum date that any records displaying must be active for.
5. View: This button will execute a search for based on the Display by fields.
6. Work Registration: This section will show the work registration records of Type "GA/GR ES" related to the person listed in the "Display by Name" field. This table will have the following fields:
   a. Status: The Work Registration status. This will be a hyperlink to the Work Registration Detail page in View Mode when the user has the "WorkRegistrationDetailView" right.
   b. Status Reason: The status reason for the Work Registration.

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       c. Begin Date: The begin date of the Work Registration.

       d. End Date: The end date of the Work Registration.

       e. Edit: This button will take the user to the Work Registration Detail page in Edit mode. This button will only display when the user has the "WorkRegistrationDetailView" right.

       f. View History: This button will open the Transaction History Detail page for the related Work Registration record.

7. Program: This section will show the Status of the program. This table will display the following results:

       a. Status: The Status of the program.

       b. Begin Date: The date the program status began.

       c. End Date: The date the program status ends.

2.5.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** GA/GR Employment Services

2.5.5 Security Updates

No security updates.

2.5.6 Page Mapping

Add page mappings for the new page title.

2.5.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

2.6 GA/GR Employment Services Status Detail

2.6.1 Overview

The "GA/GR Employment Services Status Detail" page is used to display or create detailed information regarding a program status.

2.6.2 GA/GR Employment Services Status Detail Mockup

Figure 2.6.2.1 – GA/GR Employment Services Status Detail – (View)

Figure 2.6.2.2 – GA/GR Employment Services Status Detail – (Create)

2.6.3 Description of Changes

1. Status: This dropdown will only be editable in Create Mode. This field will be a dropdown field with the following options:
   a. Sanction
   b. Pending
   c. Non-Comp

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d. Deregistered
e. Active
2. Status Reason: The Status Reason dropdown will not display when the Status is "Pending". This dropdown will only be editable in Create Mode. This field will be a dropdown with the following options based on the associated Status value:
a. Active
i. Participating
ii. Pending Appraisal
iii. No Activity
b. Sanction
i. CA - Failed to keep Case Manager Appointment
ii. FO - Failed to keep Orientation
iii. OS - Failed to keep Workforce Investment Act Activity
iv. JC - Failed to keep Job Readiness Training
v. YT - Failed to keep Youth Activity
vi. YT - Failed to keep Summer Youth Employment Activity
vii. YT - Failed to keep CSE Activity
viii. YT - Failed to keep CSBG Activity
ix. ST - Failed to keep Short-Term Training Activity
x. SP - Failed to keep Self-Initiated Program
xi. DM - Failed to keep Domestic Violence Services
xii. MH - Failed to keep Mental Health Services
xiii. MH - Failed to keep Clinical Assessment
xiv. VA - Failed to keep Vocational Assessment Appointment
xv. TA - Failed to keep Education Training
xvi. TA - Failed to keep Literacy
xvii. TA - Failed to keep GED Activity
xviii. JS - Failed to keep Intensive Case Management Activity
xix. WT - Failed Job/Training Offered
xx. WT - Failed Family Reunification
xxi. WR - Failed to keep Employment Needs Evaluation Activity
xxii. WR - Failed to keep Day Reporting Center Activity
xxiii. WR - Failed to keep Job Fair Activity
xxiv. FT - Failed to keep Career Opportunities Resources & Employment
xxv. FT - Failed to keep Pathway To Success Activity
xxvi. FT - Failed to keep Life Skill Activity
xxvii. OP - Failed to keep Office Occupations Activity
xxviii. OP - Failed to keep Security Officer Training
xxix. OP - Failed to keep Security Officer Assessment
xxx. OP - Failed to keep Computer Application Class Activity
xxxi. NC - Failed to keep Non-Custodial Parent Activity
xxxii. OS - Failed to keep One-Stop Activity
c. Non-Comp
i. CA - Failed to keep Case Manager Appointment
ii. FO - Failed to keep Orientation

Commented [TF1]: Check if we can use different status reasons

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      iii. JC - Failed to keep Job Readiness Training
      iv. SP - Failed to keep Self-Initiated Program
      v. DM - Failed to keep Domestic Violence Services
      vi. MH - Failed to keep Mental Health Services
      vii. MH - Failed to keep Clinical Assessment
      viii. VA - Failed to keep Vocational Assessment Appointment
      ix. TA - Failed to keep Education Training
      x. TA - Failed to keep Literacy
      xi. TA - Failed to keep GED Activity
      xii. JS - Failed to keep Intensive Case Management Activity
      xiii. WT - Failed Job/Training Offered
      xiv. WT - Failed Family Reunification
      xv. WR - Failed to keep Employment Needs Evaluation Activity
      xvi. WR - Failed to keep Day Reporting Center Activity
      xvii. WR - Failed to keep Job Fair Activity
      xviii. FT - Failed to keep Career Opportunities Resources & Employment
      xix. FT - Failed to keep Pathway To Success Activity
      xx. FT - Failed to keep Life Skill Activity
      xxi. OP - Failed to keep Office Occupations Activity
      xxii. OP - Failed to keep Security Officer Training
      xxiii. OP - Failed to keep Security Officer Assessment
      xxiv. OP - Failed to keep Computer Application Class Activity
      xxv. NC - Failed to keep Non-Custodial Parent Activity
      xxvi. OS - Failed to keep One-Stop Activity
      xxvii. OS - Failed to keep Workforce Investment Act Activity
      xxviii. YT - Failed to keep Youth Activity
      xxix. YT - Failed to keep Summer Youth Employment Activity
      xxx. YT - Failed to keep CSE Activity
      xxxi. YT - Failed to keep CSBG Activity
      xxxii. ST - Failed to keep Short-Term Training Activity
      xxxiii. Refused job offer/Voluntarily quit job
      xxxiv. JC - Failed to keep Job Readiness Training for Youth
      xxxv. YT - Failed to keep GROW Transition-Age Youth Employment Program (GTEP)
      xxxvi. YT - Failed to keep GROW Youth Employment Program (GYEP)
      xxxvii. RP - Failed to keep Rapid Employment & Promotion
    d. Deregistered
      i. Terminated due to time limit
      ii. Change to Unemployable
      iii. Terminated due to 0-day sanction
      iv. Terminated due to 30-day sanction
      v. Terminated due to 60-day sanction
      vi. Terminated due to other GR reasons
3. Begin Date: The begin date of the program status
4. End Date: The End date of the program status

5. Save and Return: This button will only appear in Create mode. This button will save the new status and navigate the user to the GA/GR Employment Services Status List page.
6. Cancel: This button will only appear in Create mode. This button will discard the new status changes and navigate the user to the GA/GR Employment Services Status List page.
7. Close: This button will only appear in View mode. This button will navigate the user to the GA/GR Employment Services Status List page.

2.6.4 Page Location
- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** GA/GR Employment Services

2.6.5 Security Updates
No security updates.

2.6.6 Page Mapping
Add page mappings for the new page title.

2.6.7 Page Usage/Data Volume Impacts
No page usage or data volume impacts.

2.7 Resource Search

2.7.1 Overview
The resource search page is used to find existing Organizations within the system. This page will be updated to include the new Category and Type options linked specifically for the new GA/GR Employment Services program.

2.7.2 Resource Search Mockup

Resource Search

*- Indicates required fields

Figure 2.2.2.1 – Resource Search

2.7.3 Description of Changes

1. Add the following Service Category and Service Type Combinations:
    a. GA/GR Employment Services
        i. Adult Basic Education
        ii. Appraisal
        iii. Assessment
        iv. Community Services
        v. Domestic Abuse Services
        vi. Drug or Alcohol Rehabilitation
        vii. Education
        viii. Employment
        ix. Employment Services
        x. English Language Training
        xi. Homeless
        xii. Job Club

xiii.   Job Search
xiv.   Mental Health Services
xv.   On-the-Job Training
xvi.   Orientation
xvii.   Other
xviii.   Secondary School
xix.   Skills Training
xx.   Substance Abuse Services
xxi.   Vocational Rehabilitation
xxii.   Vocational Training
xxiii.   Work Experience
xxiv.   Workfare

2.7.4   Page Location
- **Global:** Resource Databank
- **Local:** Resources
- **Task:** Resource Search

2.7.5   Security Updates
No security updates.

2.7.6   Page Mapping
No page mapping updates.

2.7.7   Page Usage/Data Volume Impacts
No page usage or data volume impacts.

2.8   Select Activity

2.8.1   Overview
The "Select Activity" page is used to allow the worker to select the type of activity that they wish to create for the participant.

2.8.2 Select Activity Mockup

Select Activity

Figure 2.8.2.1 – Select Activity

2.8.3 Description of Changes

1. Add the following Service Category and Service Type Combinations:
   a. GA/GR Employment Services
      i. Adult Basic Education
      ii. Appraisal
      iii. Assessment
      iv. Community Services
      v. Domestic Abuse Services
      vi. Drug or Alcohol Rehabilitation
      vii. Education
      viii. Employment
      ix. Employment Services
      x. English Language Training
      xi. Homeless
      xii. Job Club
      xiii. Job Search
      xiv. Mental Health Services
      xv. On-the-Job Training
      xvi. Orientation
      xvii. Other

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<div align="right">

xviii. Secondary School
xix. Skills Training
xx. Substance Abuse Services
xxi. Vocational Rehabilitation
xxii. Vocational Training
xxiii. Work Experience
xxiv. Workfare

</div>

2.8.4 Page Location

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

2.8.5 Security Updates

No security updates.

2.8.6 Page Mapping

No page mapping updates.

2.8.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

2.9 Service Detail

2.9.1 Overview

The "Service Detail" is used to indicate the type of services a resource can provide.

2.9.2 Service Detail Mockup

Service Detail

Figure 2.9.2.1 – Select Activity

2.9.3 Description of Changes

1. Add the following Service Category and Service Type Combinations:

a. GA/GR Employment Services
    i. Adult Basic Education
    ii. Appraisal
    iii. Assessment
    iv. Community Services
    v. Domestic Abuse Services
    vi. Drug or Alcohol Rehabilitation
    vii. Education
    viii. Employment
    ix. Employment Services
    x. English Language Training
    xi. Homeless
    xii. Job Club
    xiii. Job Search
    xiv. Mental Health Services
    xv. On-the-Job Training
    xvi. Orientation
    xvii. Other
    xviii. Secondary School
    xix. Skills Training
    xx. Substance Abuse Services
    xxi. Vocational Rehabilitation
    xxii. Vocational Training
    xxiii. Work Experience
    xxiv. Workfare

2.9.4 Page Location

- **Global:** Resource Databank
- **Local:** Resources
- **Task:** Services

2.9.5 Security Updates

No security updates.

2.9.6 Page Mapping

No page mapping updates.

2.9.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2313	The CONTRACTOR must design, implement and test GA/GR Program functionality leveraging LRS as is whenever possible. This includes: 1) Page Availability by County (Page Configurable) 2) Parts of page available; Data Collection (Page Configurable for GA/GR only) 3) Values contained within a field (Reference Table Configurable – Drop down values) 4) A County Level Administration page for the following areas: a) Amount of benefits issued by program by case (Max grant amount, rent, utilities etc.. for EDBC calculation) b)Real/Personal Property and Resource limits c)Time Clock settings EDBC rule d) Household Composition- Only rule turn on/off is available but cannot define the composition applicable by county. This is not current CalWIN functionality	Requirement 1: This will be configurable using county security roles. Requirement 2: Parts of the page will not be configurable by County Requirement 3: All dropdown will use Standard values where applicable. Online: No Updates to the Resource Databank are required to track Employment Service Activities. No new pages are required to track the GR Employment Service Program for the CalWIN Counties Requirement 4: The County admin page will be implemented in CalSAWS and will only be used by County Admin to affect specified rules and conditions. Not all rules will be available	New Activity Types are being added in support of the new Employment services program.

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e) HH Reporting responsibilities
 	
5) Methods of benefit issuance(s)
 	
        i) Proration- will be based on the BDA field populated by the user
 	
        ii) Immediate Need - use rush indicator in EDBC
 	
6) Eligibility Determination required
 	
        i) Beginning Date of Aid set manually by the county
 	
        ii) Residency (This is for EDBC rule and not the number of days)
 	
7) Non-System Determined manual value entered – no EDBC
 	
8) Employment Services Program Participation Required
 	
        i) Assessment
 	
        ii) Orientation
 	
        iii) Activities
 	
9) County Defined Aid Codes within the MEDS identified range
 	
10) Hearings
 	
        i) Aid Paid Pending
 	
11) Counties will have the opportunity to opt in/opt out of specific pages/functionality
	to be controlled from the county Admin page. The impacts from these updates will not be immediate but will occur overnight.
	
	Requirement 5.1 and 6.2:
	
	Eligibility:
	
	This will be handled as part of GA/GR rules in CalSAWS as mentioned in the DDID #2314
	
	Requirement 5.2:
	
	Fiscal:
	
	No updates are required to select the immediacy indicator (Rush or Routine and Manually issued)
	
	Requirement 6.1:
	
	This will be handled manually by the worker.
	
	Requirement 7:
	
	Eligibility:
	
	The CalSAWS manual EDBC solution will be leveraged for this requirement.
	
	Requirement 8:
	
	Fiscal:
	
	1. No Updates to the Resource Databank are required to track	

		Employment Service Activities.	
		2. No updates are required to the county specific fiscal interface to support the GR Employment service program	
		Requirement 8.1, 8.2, 8.3	
		Batch and Interfaces:	
		Create 6 new GR Employment Service Program Automation batch jobs for 57 counties and make these county configurable.	
		1. Employment Service Deregistration	
		2. Worker assignment	
		3. Worker removal.	
		4. 3 batch jobs for closing of activities (when the GA program is discontinued, when the participant didn't submit the progress report)	
		Note:	
		The existing 20 GROW employment service status change batch jobs will remain LA county specific and will not be available/configured for the other 57 counties.	
		The existing 15 GROW employment services batch jobs (includes	

		deregistration, Employment services management, Worker assignment, non-compliance management) will remain LA county specific and will not be available/configured for the other 57 counties. Requirement 10: Eligibility: The existing aid paid pending business functionality of CalWORKs in CalSAWS will be repurposed for GA/GR. Requirement 11: Online/Fiscal: This will be maintained by the county administrators and no changes are required in CalSAWS.	

4 APPENDIX

A. Program Reference table values

Code_Num_Identif	GE
SHORT_DECODE_NAME	GA/GR Employment Services
Program Code	Y
Other Assistance Program Code	N
Considered Public Assistance	N
FS Count in Allotment	N
Multiple Programs Allowed	Y
Organization as Payee	Y
Intake Program	Y
Report Inter-County Transfer	N
Eligibility EDBC Indicator	N
NOABenefitType	
Caseload Search Indicator	Y
Intake Redetermination Flag	N
WDTIP Program Codes	
External Programs	
Manual EDBC Indicator	N
Redetermination Indicator	N
Recovery Account Indicator	Y
Allow Service Arrangement	Y
Aid Code Base Program	GR
Un-Reimbursed Assistance Program Codes	N
SIU Referred Program	Y
RA Uncollectible Status	Y
Uncollectible Cash	Y
IPV Programs	N
Is Application Considered	Y
Time Limits Program	
C4Yourself	
Managed Application	N
EICT	
EICT Programs	
Reception Log Program Codes	GE
RCC Programs	
Call Log Program Codes	GA/GR Employment Services
LALegacyPgmCodes	

Case Flag Programs	
Receipt Programs	Y
Program Hierarchy	13
YBN_Outbound	GE
Job Development Activity	
ES Search Code	Y
Change Reason Program	
Distinguish between DCFS and DPSS Programs	DPSS
Spanish	
Pending Authorization Days To Complete	0
Program Code to Display	GE
EBT Stagger Program	N
YBN_EW_Communication	GE
Program Rescission Time Limit	0
Recovery Account Assignment	GR
Leader Program Name	
Authorized Representative	N
Program to display online	GA/GR Employment Services
Activity Agreement programs	N
Batch EDBC All programs mode	N
Available for EDBC Threshold	N
Available for supportive Services	Y

B. List of Affected Pages
   a. Best Practice Detail
   b. Best Practice Search
   c. Call Log Detail
   d. Care and Maintenance Fund Detail
   e. Computation Request Detail
   f. Create QA/QC Batch
   g. Distributed Documents Search
   h. Eligibility Non-Compliance List
   i. Findings Detail
   j. Fiscal History Search
   k. Foster care Recovery Account Detail
   l. Hearing Detail
   m. Invoice Search
   n. Money Management List
   o. Office Detail
   p. Other Program Assistance Detail
   q. Pending Authorizations
   r. Pending Workload Assignment List
   s. Performance Analysis detail
   t. Program Detail

u. Quality Review Detail
v. Receipt Mass Upload Search
w. Reception Log Detail
x. Recovery Account Detail
y. Recovery Account Search
z. Recovery Account Workload Inventory
aa. Reminders List
bb. Report Search
cc. Select Document
dd. Service Arrangements List
ee. Special Investigation Detail
ff. Special Investigations Referral
gg. Standards Detail
hh. Template Repository Search
ii. Unreimbursed Assignment pool
jj. Valuable Request Search
kk. Verification Detail
ll. Workload Reassignment Detail

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-225456

Imaging Form Names Clean-Up

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dana Petersen, Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Michael Wu, Alexia England, Himanshu Jain, Robyn Anderson, Stephanie Hugo, Sreekanth Kalvoju

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/6/2021	1.0	Initial	Erika Kusnadi-Cerezo

Table of Contents

1 OVERVIEW

CalSAWS stores system generated documents template and metadata in the DOC_TEMPL table and Imaging-exclusive reference table on the DOC_TEMPL_IMG table. In order for both tables to work accordingly with the CalSAWS Imaging Solution (Hyland), both tables will need to be updated with the most up to date Imaging information. Secondly, CA-214039 mapped inbound and outbound ICT document types to the DOC_TEMPL_IMG table but it was not implemented to the DOC_TEMPL table as well. This SCR will update both the DOC_TEMPL and DOC_TEMPL_IMG tables with the most up to date Imaging information, mapped inbound and outbound ICT document types to the DOC_TEMPL table and lastly add new Image Document Type Codes to Category Table 452.

1.1 Current Design

CalSAWS stores system generated documents template and metadata in the DOC_TEMPL table and Imaging-exclusive reference table on the DOC_TEMPL_IMG table. However, CalSAWS does not have the most up to date Imaging information in the database. The DOC_TEMPL table also does not include mapping information for inbound and outbound ICT document types. Lastly, there are Image Document Type Codes that exist in the C-IV system Category table 452 that does not exist in the CalSAWS system.

1.2 Requests

1. Update the DOC_TEMPL table to include the mapping for inbound and outbound ICT document type.
2. Update the existing documents on the DOC_TEMPL and DOC_TEMPL_IMG with the latest Imaging information.
3. Update the existing documents on the DOC_TEMPL_IMG with the latest inbound, outbound ICT document types.
4. Add new Imaging Exclusive documents to the DOC_TEMPL_IMG table.
5. Add new Image Document Type Codes to Category table 452.

1.3 Overview of Recommendations

1. Add 3 new columns to the DOC_TEMPL table in order to map the inbound, outbound ICT document type.
2. Existing documents on the DOC_TEMPL and DOC_TEMPL_IMG table will be updated with the most up to date Imaging information.
3. Existing documents on the DOC_TEMPL_IMG table will be updated with the most up to date inbound, outbound ICT document types.
4. New Imaging Exclusive documents will be added to the DOC_TEMPL_IMG table.
5. Remove Imaging Exclusive documents that are no longer valid from the DOC_TEMPL_IMG table.
6. Add new Image Document Type Codes to Category table 452.

1.4 Assumptions

1. CA-215168 will add GEN 201 will be added to CalSAWS either prior or at the same time as this SCR.

2   RECOMMENDATIONS

Update the DOC_TEMPL and DOC_TEMPL_IMG with the latest Imaging information along with inbound, outbound ICT document types. New Image Document Type Codes will be added to Category table 452.

2.1   DOC_TEMPL

2.1.1   Overview

Update the DOC_TEMPL table with new columns that are required for the mapping of inbound, outbound ICT document types. Existing documents will also be updated with the latest Imaging document type information.

2.1.2   Description of Change

1. Add 3 new columns to the DOC_TEMPL table.
    a. ICT_INBND_DOC_TYPE_CODE
        i. Data Type: VARCHAR2
        ii. Data Length: 3
        iii. Nullable: Y
        iv. Comment: 558- This is the document type that is transmitted over the eICT interface.
    b. ICT_OUTBND_DOC_TYPE_CODE
        i. Data Type: VARCHAR2
        ii. Data Length: 3
        iii. Nullabe: Y
        iv. Comment: 558- This is the document type that is transmitted over the eICT interface.
    c. ICT_DOC_CATGRY_CODE
        i. Data Type: VARCHAR2
        ii. Data Length: 3
        iii. Nullabe: Y
        iv. Comment: 554 – This is the document category type.
2. Update the DOC_TEMPL table to populate the values for the following columns. Please reference the New DOC_TEMPL Columns tab on the CA-225456 Clean Up Document.xlsx for more details.
    a. ICT_INBND_DOC_TYPE_CODE
    b. ICT_OUTBND_DOC_TYPE_CODE
    c. ICT_DOC_CATGRY_CODE
3. Update the existing values on the following columns, please reference the Updates to DOC_TEMPL tab on the CA-225456 Clean Up Document.xlsx for more details.
    a. IMG_TITLE_NAME
    b. IMG_TYPE
    c. CASE_PERS

2.1.3 Estimated Number of Records Impacted/Performance

There are roughly 230+ documents on the DOC_TEMPL table that will be impacted.

2.2 DOC_TEMPL_IMG

2.2.1 Overview

Existing documents on the DOC_TEMPL_IMG table will be updated with the lastest imaging information along with the inbound, outbound ICT document types value. Secondly, new imaging exclusive document will be added to the DOC_TEMPL_IMG and documents that are no longer valid will be removed from the DOC_TEMPL_IMG.

2.2.2 Description of Change

1. Update the existing values on the following columns, please reference the Updates to DOC_TEMPL_IMG tab on the CA-225456 Clean Up Document.xlsx for more details.
   a. CASE_PERS
   b. ICT_INBND_DOC_TYPE_CODE
   c. ICT_OUTBND_DOC_TYPE_CODE
   d. ICT_DOC_CATGRY_CODE
2. Add new Imaging Exclusive documents to the DOC_TEMPL_IMG table, please reference the Add to DOC_TEMPL_IMG tab on the CA-225456 Clean Up Document.xlsx for more details.
3. Remove 8 Imaging Exclusive documents from the DOC_TEMPL_IMG table, please reference the Remove from DOC_TEMPL_IMG tab on the CA-225456 Clean Up Document.xlsx for more details.

2.2.3 Estimated Number of Records Impacted/Performance

There's a total of 6 documents that will need to be updated and roughly 30+ new documents that will be added.

2.3 CATGRY_ID 452

2.3.1 Overview

7 new Image Document Type Codes will be added to the CalSAWS Code Detail 452 table. This will allow CIV data to be migrated as is during migration.

2.3.2 Description of Change

1. Add the following values to the code detail table (CODE_DETL 452), please reference the CAT 452 tab of the CA-225456 Clean Up Document.xlsx for details.
   a. MAGI Manual NOA
   b. NA 215
   c. NA 1267
   d. Other Child Care
   e. Travel Assist Claim
   f. School Attendance
   g. Mobile Default

2.3.3 Estimated Number of Records Impacted/Performance

7 new image Document Type Codes will be added to the CalSAWS Code Detail 452 table.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	CC	Updates to the DB	CA-225456 Clean Up Document.xlsx

4   REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 2198	The CONTRACTOR shall configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to perform the following functions when a system generated barcode is recognized by the imaging solution: 1) Perform a	This design updates data for use in a Get Form Info Web Service, in which the Imaging System requests all CalSAWS system-generated and

	CalSAWS Software lookup of Form Name, Form Number, Case Name, Case Number, and Document Type2) Check the barcode against the case information entered during the scan mode 2a) Not applicable to multi-case scan mode3) If the document is time sensitive (tracked), mark the document as received in the CalSAWS Software3a) If the barcode is not recognized, time sensitive (tracked) documents are reviewed by designated staff to confirm the barcode	Imaging-exclusive form information.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-225902

SCR – Business Intelligence – Reception Log
Dashboard Update

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Kevin Ovalle
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/03/2021	1.0	Initial revision	Kevin Ovalle

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1 OVERVIEW

As part of the Analytics Re-Platform effort. The LRS landing page (LRS Reports/BI/Reception Log) links need to be modified - to include a separate link for the Historical Reception Log dashboard.

1.1 Current Design

The LRS Landing page currently has one link to the entire Reception Log dashboard. Said link points to the Office View page of the Reception Log Dashboard.

CalSAWS						📖 Journal ☑ Tasks ❓ Help 📄 Resources 📖 Page Mapping 🖼 Images 🖼 DCFS Images 📤 Log Out

Los Angeles PROD	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	**Reports**	Client Corresp.	Admin Tools

Business Intelligence	**Report Search**
Scorecards	▸ Refine Your Search
DPSSSTATS	
Reception Log	**Search Results Summary** **Results 1 - 1 of 1**
Statistical Summary Analysis	**Title** **Category**
Real Time Task Management	▽ ▽
Operations Reports	Reception Log - Office View Reception Log
Child Welfare Programs STATS	This Type 1 page took 0.86 seconds to load.

1.2 Requests

The following update will be made to the LRS/CalSAWS landing page for the dashboard to resolve design differences:

1. Update report landing page to have three links (Reception Log - Real Time Office View, Reception Log - Real Time County View, Reception Log - Historical) instead of one (Reception Log - Office View)

1.3 Overview of Recommendations

1. Update the LRS Landing page to display 3 links (Reception Log - Real Time Office View, Reception Log - Real Time County View, Reception Log - Historical)

1.4 Assumptions

2 RECOMMENDATIONS

The modified LRS Landing page will contain descriptive links to each sheet of the dashboard.

2.1.1 LRS Landing Page mockup

2.1.2 Description of Change

Update report landing page to have three links (Reception Log - Real Time Office View, Reception Log - Real Time County View, Reception Log - Historical) instead of one (Reception Log - Office View)

2.1.3 Report Location

- LRS Reports/BI/Reception Log

2.1.4 Counties Impacted

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

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		None	

5 MIGRATION IMPACTS

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

6   APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-225987

DDID 34

Task Management

Guided Navigation Updates

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/22/2021	1.0	Initial Revision	Rakan Ali

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1 OVERVIEW

This design includes recommendations to enhance Task Guided Navigation functionality.

1.1 Current Design

The CalSAWS System Worklist pages include functionality to navigate a user through one or more pages within a predefined page set while working a Task. This functionality is referred to as Guided Navigation.

The Task Pop-Up pages accessible with the Utilities "Tasks" link also allow users to work Tasks. The Task Pop-Up pages do not include the capability to initiate Guided Navigation.

1.2 Requests

Modify the CalSAWS System to allow initiation of Guided Navigation from the Task Pop-Up pages.

1.3 Overview of Recommendations

1. Update the logic that determines whether to display a Guided Navigation hyperlink on the Worklist, Worklist PR RE and Pending Authorizations pages to no longer be fully reliant on a specific Task Type name.
2. Incorporate a Guided Navigation hyperlink on the Task Pop-Up pages.
3. Update the Automated Action Detail page to include an attribute allowing users to turn on/off Guided Navigation for Automated Actions that have a Guided Navigation page set defined.
4. Update Deputy Authorization Task Type names.

1.4 Assumptions

1. The Guided Navigation experience currently available on the Worklist, Worklist PR RE and Pending Authorizations pages will not be modified. This design only modifies the logic that determines whether to display the Guided Navigation hyperlink on these pages.
2. There will be no modifications to the Authorization Task processing with the renaming of the Deputy Authorization Task Type names.
3. Automated Actions/Task Types outside of the inventory workbook in the Supporting Documents section do not have a Guided Navigation page set defined.
4. Guided Navigation page sets that currently exist and function for Los Angeles county will remain available for Los Angeles county.

2 RECOMMENDATIONS

This section will outline recommendations to update Task pages in the CalSAWS System to allow users to initiate Task Guided Navigation from the Task Pop-Up pages.

2.1 Task Guided Navigation Hyperlink Conditions

2.1.1 Description of Changes

1. Update the Task Guided Navigation Hyperlink display logic. A Task Guided Navigation hyperlink will display on the online pages referenced in Recommendation #2.2 when one or more of the following scenarios are met:

Scenario	County	Description
1	All	• The Task is assigned to the logged in user. • The Task is a "system task", which is a Task that is tied to specific processing within the CalSAWS System. These Task Types are available in the CalSAWS System for reference only and are not configurable. Reference the workbook within the Supporting Documents section for an inventory of "system" tasks.
2	All	• The Task is assigned to the logged in user. • The Task originated from an Automated Action with an associated Guided Navigation page set. • The Guided Navigation attribute on the Automated Action Detail page is "Yes". Reference the workbook within the Supporting Documents section for an inventory of Automated Actions that will display the Guided Navigation attribute.
3	Los Angeles	• The Task does not meet Scenario #1 or #2. • The Task is assigned to the logged in user. • The Task Type of the Task was loaded into the configurable Task Type framework via Phase I of DDID 34 (CA-214927). Los Angeles county Task Types that were loaded into the configurable Task Type framework at this time each have a guided navigation page set defined. Reference the workbook within the Supporting Documents section for an inventory of Los Angeles

		county Task Types that are not "system" tasks, not Automated Actions and have a guided navigation page set defined.

Technical: The guided navigation page-set lookup logic is currently based on specific Task Type names that existed for Los Angeles county as of the 20.09 release. Update the guided navigation lookup framework to incorporate logic to determine the guided navigation page set by using a combination of the County Code of the user that clicked the hyperlink, Task Scenario Code (indicating a Task resulted from an Automated Action), and/or the Task Type name. Guided Navigation page sets that currently exist and function for Los Angeles county will remain available for Los Angeles county.

Guided navigation page sets for CalSAWS System Automated Tasks that have been moved into the Automated Action framework via DDID 1629 will be available for all CalSAWS counties for which the Automated Action has been configured via DDID 1629. Similarly, guided navigation page sets for CalSAWS System Automated Tasks that are "system tasks" will be available for all CalSAWS counties. Tasks that result from Automated Actions introduced via DDID 1628 will not display a hyperlink as a Guided Navigation page set is not available.

If Guided Navigation is initiated from one of the Task Pop-Up pages, and the page set defines a completion page, the final page in the flow will be the CalSAWS Homepage. The completion page for Guided Navigation that is initiated from the Worklist pages will not be modified. The completion page that is displayed is dependent on the page that initiated the Guided Navigation page flow. This function is due to the complex processing in the CalSAWS System guided navigation architecture that will not be completely reworked with this enhancement.

For example, a worker clicks the Guided Navigation hyperlink from a Task Pop up page, works through half of the pages in the page flow, logs out and goes to lunch. The worker returns after lunch, logs into CalSAWS and re-initiates Guided Navigation for the same Task, but this time they click the hyperlink on the Worklist page, when the end of the page flow is reached, the Homepage will be displayed as opposed to the Worklist page.

2.2 Update/Add the Task Guided Navigation Hyperlink on Task Pages

2.2.1 Description of Changes

1. Update the following Task Pages to display a Guided Navigation Hyperlink when applicable:

a. <u>My Tasks Pop-Up</u>
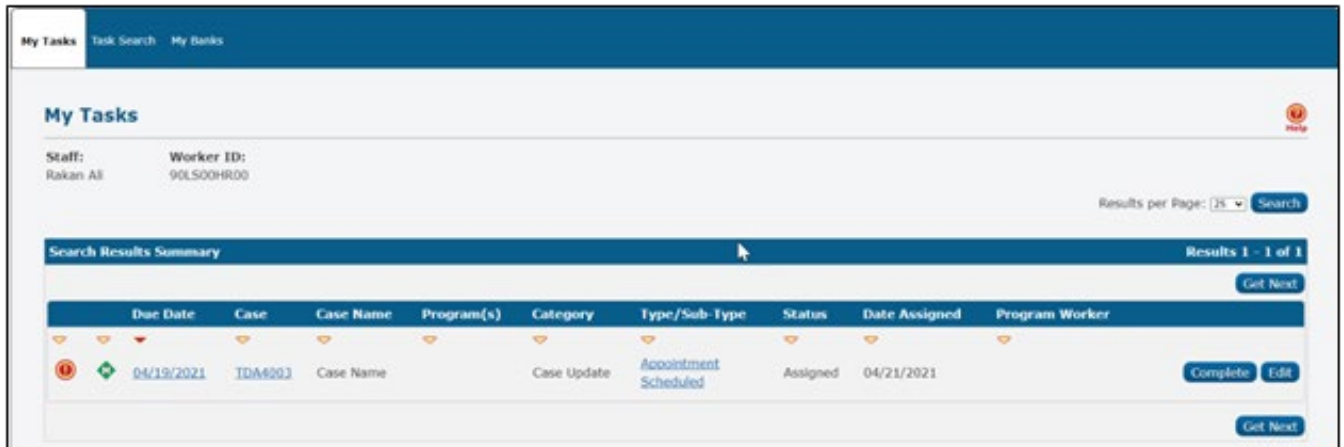
Figure 2.2.1.2.a-1 – Task Pop-Up My Tasks Page Mockup

    i. Update the Task Pop-Up My Tasks page to display the Task Type/Sub-Type value as a hyperlink to initiate Guided Navigation when available per Section 2.1. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text. Note: The display behavior of the Long Description hover box that displays on mouseover of this field will not be impacted. **Behavior:** When the hyperlink is clicked, the Task Detail overlay for the Task will display in the Pop-Up window and Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

b. <u>Task Search Pop-Up</u>
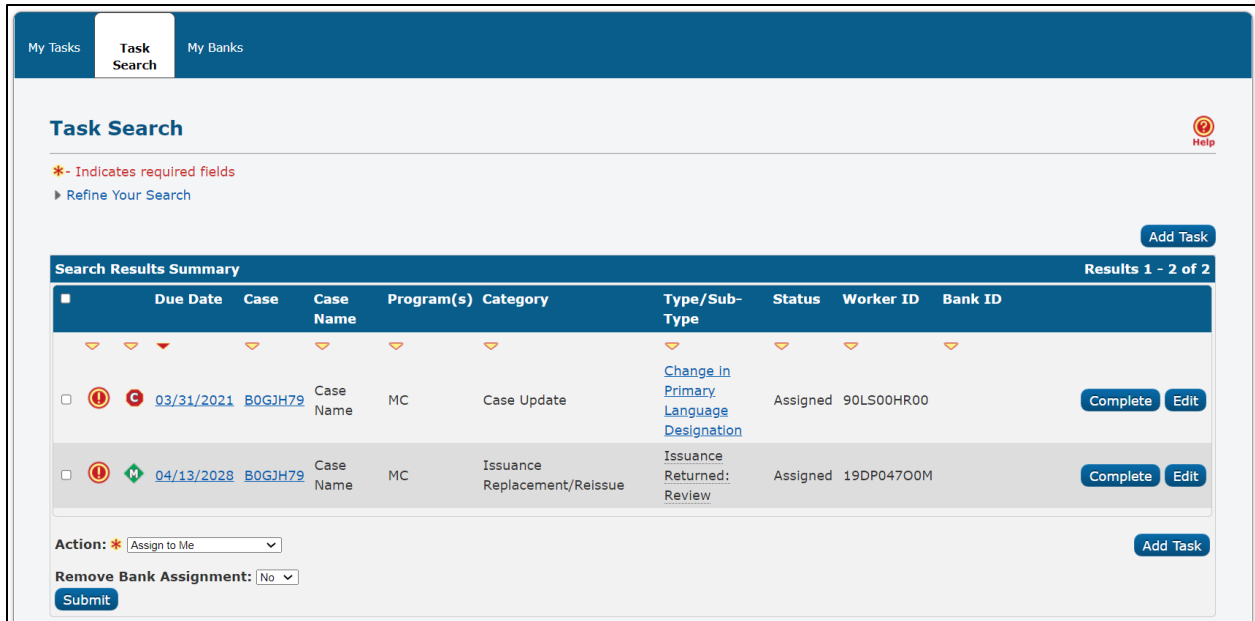
Figure 2.2.1.2.b-1 – Task Pop-Up Task Search Page Mockup

i. Update the Task Pop-Up Task Search page to display the Task Type/Sub-Type value as a hyperlink to initiate Guided Navigation when available. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text. Note: The display behavior of the Long Description hover box that displays on mouseover of this field will not be impacted.

Behavior: When the hyperlink is clicked, the Task Detail overlay for the Task will display in the Pop-Up window and Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

c. Task Pop-Up Task Detail Page

Figure 2.2.1.2.c-1 – Task Pop-Up Task Detail Page Mockup

      i.   Update the Task Pop-Up Task Detail page to display the Task Type value as a hyperlink to initiate Guided Navigation when available. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text.

          Behavior: When the hyperlink is clicked, Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

2. Update the Guided Navigation Hyperlink display logic per Section 2.1 on the following Task pages.

    a. <u>Worklist</u>
       Guided Navigation hyperlink field: "Type / Sub-Type"

    b. <u>Worklist PR RE</u>
       Guided Navigation hyperlink field: "Type / Sub-Type"

    c. <u>Pending Authorizations</u>
       Guided Navigation hyperlink field: "Type"

The Guided Navigation experience that is initiated by clicking the hyperlink from these pages will not be modified.

2.3 Automated Action Detail Page

2.3.1 Overview

The Automated Action Detail page is accessible from the Automated Action List page. This page allows the User to view and configure Automated Action attributes.

2.3.2 Automated Action Detail Page Mockup

Automated Action Detail

	Save And Return Cancel

Action Information

Name:
180 Day EC Good Cause set to expire

Type:
Create Task

Status: ✱
Active ⌄

Program(s):
FC

Run Date:
Daily(Mon-Sat)

Source:
Batch

Scenario:
Emergency Caregiver Good Cause date set to expire

Task Information

Task Type: ✱
180-Day EC Good Cause set to expire ⌄

Due Date:
Default Due Date ⌄

Default Due Date:
30 days

Initial Assignment:
Program Worker/Bank ⌄

Program Worker:
Currently Assigned Worker ⌄

Default Bank ID:
[   ] Select

Guided Navigation: ✱
No ⌄

Long Description:
180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.

	Save And Return Cancel

Figure 2.3.2.1 – Automated Action Detail Mockup Edit Mode

Automated Action Detail

<div align="right">

Edit   **Close**

</div>

Action Information

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

Task Information

Task Type: ✱
180-Day EC Good Cause set to expire

Due Date:	**Default Due Date:**
Default Due Date	30 days
Initial Assignment:	**Program Worker:**
Program Worker/Bank	Currently Assigned Worker
	Default Bank ID:

Guided Navigation: ✱
No

Long Description:
180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.

<div align="right">

Edit   **Close**

</div>

Figure 2.3.2.2 – Automated Action Detail Mockup View Mode

2.3.3 Description of Changes

1. Update the Automated Action Detail page to include a Guided Navigation attribute. The Guided Navigation attribute will be used by the logic described in Section 2.1 for display of a Guided Navigation hyperlink for a Task.
   a. Guided Navigation **(required)** – This dropdown field indicates if Tasks that result from the Automated Action have been enabled for Guided Navigation. Options include:
      i. Yes – This option enables Guided Navigation for existing Tasks in the Assigned and In Process Statuses and any Tasks created in the future through the specific Automated Action.
      ii. No – This option disables Guided Navigation for the Tasks created through the specific Automated Action.
   b. The attribute will display on the page if the Automated Action has a Guided Navigation page set defined. For example, Automated Actions that have been added to the CalSAWS System as part of

DDID 1628 (C-IV System Automated Actions) do not have a Guided Navigation page set defined, so the attribute will not display. Reference the workbook in the Supporting Documents section for an inventory of Automated Actions that will display the attribute.

c. For Automated Actions that will display the Guided Navigation attribute, the value will be set to "No" initially for all Automated Actions/counties other than Los Angeles. The attribute will initially be set to "Yes" for Los Angeles county Automated Actions that have a guided navigation page set available.

2.3.4 Page Validations

N/A

2.3.5 Page Location

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

Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.
The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.3.6 Security Updates

N/A – No Changes to Security

2.3.7 Page Mapping

Update page mapping for the Automated Action Detail page to include the Guided Navigation attribute.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Deputy Authorization Task Types

2.4.1 Description of Changes

1. Update the Authorization Task Type names that reference "Deputy" to now reference "2nd Level". **Technical:** Guided Navigation task type name references while looking up a Guided Navigation page set will also be updated.

Previous Names:
- Deputy Authorization – Invoice
- Deputy Authorization - Transaction Refund
- Deputy Authorization - Issuance Replacement/Reissue
- Deputy Authorization - Payment Request (Lvl 1)
- Deputy Authorization - Payment Request (Lvl 2)
- Deputy Authorization - Valuable (Lvl 1)
- Deputy Authorization - Valuable (Lvl 2)
- Deputy Authorization EDBC

Updated Names:
- 2nd Level Authorization – Invoice
- 2nd Level Authorization - Transaction Refund
- 2nd Level Authorization - Issuance Replacement/Reissue
- 2nd Level Authorization - Payment Request (Lvl 1)
- 2nd Level Authorization - Payment Request (Lvl 2)
- 2nd Level Authorization - Valuable (Lvl 1)
- 2nd Level Authorization - Valuable (Lvl 2)
- 2nd Level Authorization EDBC

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Task Management	Guided Navigation Inventory	Guided Navigation Inventory.xlsx

4 REQUIREMENTS

4.1 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 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	- 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.	This design introduces a recommendation that will support Guided Navigation and process flow of completing Tasks, while considering configurable Automated Actions and "System Tasks".

	Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

California Statewide Automated Welfare System

Design Document

CA-226064

CalSAWS Automated Tasks

(Outside of DDID 1629 Inventory)

Task Management

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/31/2021	1.0	Initial Revision	Justin Dobbs

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1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2 RECOMMENDATIONS

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

2.1 Update CalSAWS Automated Tasks Per Automated Action Framework

2.1.1 Overview

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

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

2.1.2 Automated Action Detail – Reference Example

Figure 2.1.1 – Automated Action Detail

2.1.3 Description of Changes

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

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

Attribute values such as "Program(s)" and "Run Date" are based on the existing logic of the automated Task in the CalSAWS System. The current processing was evaluated to determine which programs the Task is applicable to, how the due date is calculated and when the automated Task creation runs. Automated Actions configured for the Initial Assignment value of "Current Program Worker" will set the "Action" attribute to "Assign to Program Worker" at Task creation.

1. RCA Program: No WTW Activity
    a. Action Information
        i. Name: RCA Program: No WTW Activity
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): RC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: An RCA program is Active and 30 or more days have passed without a WTW activity. Take appropriate action.

    b. Task Information
        i. Task Type: RCA/TCVAP to be in a WTW activity within 30 days of Approval.
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date

    iv. Default Due Date: 7 days

    v. Initial Assignment: Default Assignment

    vi. Default Assignment: Current Program Worker

    vii. Long Description: RCA/TCVAP No activity open in the last 30 days

c. Modify the batch process (PB19A235) to evaluate data for all CalSAWS counties.

2. ABAWD Time Clock: Exceeded
  a. Action Information
    i. Name: ABAWD Time Clock: Exceeded
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): CF
    v. Run Date: Daily(Mon-Sat)
    vi. Source: Batch
    vii. Scenario: A participant has exceeded the Able Bodied Adults Without Dependents (ABAWD) 3-month time clock.

  b. Task Information
    i. Task Type: Participant exceeded the ABAWD 3-month time clock
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 3 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Batch was unable to process EDBC for an ABAWD on the CalFresh Program that has exceeded their time limit. The attempted benefit month was {benefitMonth} and it skipped for the following reasons: {skipReasons}. Please review the case and take appropriate action.

3. AAP Program: Placement Finalization Date Modification
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

  a. Action Information
    i. Name: AAP Program: Placement Finalization Date Modification
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): AA
    v. Run Date: Daily(Mon-Fri)

      vi.   Source: Batch

     vii.   Scenario: An Adoption Assistance Program request for Placement Finalization Date modification has been received.

  b. Task Information

       i.   Task Type: Received DCFS AAP record for case modification for Placement Removal Date and Placement Finalization Date.

      ii.   Task Sub-Type: N/A

     iii.   Due Date: Default Due Date

     iv.   Default Due Date: 10 days

      v.   Initial Assignment: Default Assignment

     vi.   Default Assignment: Current Program Worker

     vii.   Long Description: Adoption case information has been received for modification of PLACEMENT FINALIZATION DATE as {PLACEMENT_FINALIZATION_DATE} and PLACEMENT REMOVAL DATE as {PLACEMENT_REMOVAL_DATE}.

4. Quality Review: Findings

  a. Action Information

       i.   Name: Quality Review: Findings

      ii.   Type: Create Task

     iii.   Status: Active

     iv.   Program(s): All Programs

      v.   Run Date: Real Time

     vi.   Source: Online

     vii.   Scenario: Quality Review information has been entered for review.

  b. Task Information

       i.   Task Type: Quality Review Findings

      ii.   Task Sub-Type: N/A

     iii.   Due Date: Default Due Date

     iv.   Default Due Date: 5 days

      v.   Initial Assignment: Default Assignment

     vi.   Default Assignment: Quality Review Task Worker

     vii.   Long Description: Quality Review Findings

  c. The Default Assignment value of "Quality Review Task Worker" will employ the same logic that is currently used in the CalSAWS System for this automated Task, which is the Worker that the Quality Review has been escalated to for review. Note: This is the default assignment that will be set to preserve current functionality available for Los Angeles county. The county may change the assignment options on the Automated Action Detail page as needed.

5. CalWORKs/RCA Program: Child Deceased
   a. Action Information
      i. Name: CalWORKs/RCA Program: Child Deceased
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CW, RC
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A CalWORKs or RCA Active child is deceased. Take appropriate action.

   b. Task Information
      i. Task Type: Review for Good Cause and WTW Services - deceased child reported
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 15 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Review for Good Cause and WTW Services - deceased child reported: {Deceased Individual Name}. Decease Date: {deceasedDate}.

6. Cal-Learn Program: Non Compliance Appointment Scheduled
   a. Action Information
      i. Name: Cal-Learn Program: Non Compliance Appointment Scheduled
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CL
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Cal-Learn non compliance appointment has been scheduled for an active Cal-Learn participant

   b. Task Information
      i. Task Type: Cal-Learn Appointment result is not set
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 7 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Cal-Learn Appointment result is not set

    c. Modify the batch process (PB19A228) to evaluate data for all CalSAWS counties.

7. CalWORKs Program: Discontinued
    a. Action Information
        i. Name: CalWORKs Program: Discontinued
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CW
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A CalWORKs program has been Discontinued and the Case contains an Active WTW, REP or Cal-Learn program.

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

    c. Modify the batch process (PB19A230) to evaluate data for all CalSAWS counties.

8. Kin-GAP Program: Rate Threshold
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.
    a. Action Information
        i. Name: Kin-GAP Program: Rate Threshold
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): KG
        v. Run Date: Daily(Mon-Fri)
        vi. Source: Batch
        vii. Scenario: A Kin-GAP Program rate exceeds the standard rate. Take appropriate action.
    b. Task Information
        i. Task Type: Kin-GAP Rate Threshold
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 0 days

     v. Initial Assignment: Default Assignment

     vi. Default Assignment: Current Program Worker

     vii. Long Description: Kin-GAP standard rate of {rateAmount} exceeds the standard rate

9. Adoption Assistance Program: Recipient Active on Foster Care
   a. Action Information
      i. Name: Adoption Assistance Program: Recipient Active on Foster Care
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): AA
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: An Active Adoption Assistance Program person is Active on a Foster Care program.
   b. Task Information
      i. Task Type: Child AAP to FC
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 3 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Child AAP to FC

10. Child Placement: Deletion Failed

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

   a. Action Information
      i. Name: Child Placement: Deletion Failed
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): FC
      v. Run Date: Daily (Mon-Fri)
      vi. Source: Batch
      vii. Scenario: A child placement deletion has failed during DCFS file processing. Take appropriate action.
   b. Task Information
      i. Task Type: Child Placement Deletion Failed
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 7 days

    v. Initial Assignment: Default Assignment

    vi. Default Assignment: Actioning Worker

    vii. Long Description: Child Placement Deletion Failed. DCFS Eligibility Worker to review case and make necessary changes.

  c. The Default Assignment value of "Actioning Worker" will employ the same logic that is currently used in the CalSAWS System for this Automated Action.

11. AAP Program: Placement Finalization Date and Removal Date Modification
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

  a. Action Information

    i. Name: AAP Program: Placement Finalization Date and Removal Date Modification

    ii. Type: Create Task

    iii. Status: Active

    iv. Program(s): AA

    v. Run Date: Daily (Mon-Fri)

    vi. Source: Batch

    vii. Scenario: An Adoption Assistance Program request for Placement Finalization Date and Placement Removal Date modification has been received.

  b. Task Information

    i. Task Type: Received DCFS AAP record for case modification for Placement Removal Date and Placement Finalization Date.

    ii. Task Sub-Type: N/A

    iii. Due Date: Default Due Date

    iv. Default Due Date: 10 days

    v. Initial Assignment: Default Assignment

    vi. Default Assignment: Current Program Worker

    vii. Long Description: Adoption case information has been received for modification of PLACEMENT FINALIZATION DATE as {PLACEMENT_FINALIZATION_DATE} and PLACEMENT REMOVAL DATE as {PLACEMENT_REMOVAL_DATE}.

12. Document Received: PA 2418B
This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

a. Action Information
   i. Name: Document Received: PA 2418B
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): All Programs
   v. Run Date: Real Time
   vi. Source: Online
   vii. Scenario: An IEVS-IFDS/NHR Statement Regarding Employment for Discontinued Participants (PA 2418B) has been received.

b. Task Information
   i. Task Type: IEVS IFDS Verification Received
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 20 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: IEVS Worker
   vii. Long Description: PA 2418B has been received, review IEVS Abstract and take appropriate actions.

c. The Default Assignment value of "IEVS Worker" will employ the same logic that is currently used when this Task is triggered, which assigns to the Worker associated to the IEVS interface file record.

13. Document Received: MC 355
   This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

   a. Action Information
      i. Name: Document Received: MC 355
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): MC
      v. Run Date: Real Time
      vi. Source: Online
      vii. Scenario: A Medi-Cal Request for Information (MC 355) has been received.

   b. Task Information
      i. Task Type: MC 355 Verifications Received
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date

      iv. Default Due Date: 5 days
       v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
     vii. Long Description: Update the MC 355 Detail page with verifications received and corresponding Financial/Non-Financial pages.

14. TNB 4 Recertification Packet Received
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

    a. Action Information
        i. Name: TNB 4 Recertification Packet has been received
       ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): NB
       v. Run Date: Real Time
      vi. Source: Online
     vii. Scenario: A TNB 4 Recertification Packet has been received.

    b. Task Information
        i. Task Type: TNB4 Packet Received
       ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 5 days
       v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
     vii. Long Description: TNB4 received

15. Document Received: SAR 73
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

    a. Action Information
        i. Name: Document Received: SAR 73
       ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CW
       v. Run Date: Real Time
      vi. Source: Online
     vii. Scenario: A Senior Parent Semi-Annual Income Report (SAR 73) has been received.

b. Task Information
   i. Task Type: SAR73 Received
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 3 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: SAR73 has been received

16. Customer Report Received: Non-MAGI Screening Packet
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County

    a. Action Information
       i. Name: Customer Report Received: Non-MAGI Screening Packet
       ii. Type: Create Task
       iii. Status: Active
       iv. Program(s): MC
       v. Run Date: Real Time
       vi. Source: Online
       vii. Scenario: A Non-MAGI Screening Packet has been received.

    b. Task Information
       i. Task Type: Non-MAGI Screening Packet Received
       ii. Task Sub-Type: N/A
       iii. Due Date: Default Due Date
       iv. Default Due Date: 3 days
       v. Initial Assignment: Default Assignment
       vi. Default Assignment: Current Program Worker
       vii. Long Description: Non-MAGI Screening Packet Received

17. Customer Report Received: Non-MAGI Turning 65 Packet
    This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County

    a. Action Information
       i. Name: Customer Report Received: Non-MAGI Turning 65 Packet
       ii. Type: Create Task
       iii. Status: Active
       iv. Program(s): MC

v. Run Date: Real Time
vi. Source: Online
vii. Scenario: A Non-MAGI Turning 65 Packet has been received.

b. Task Information
i. Task Type: Non-MAGI Turning 65 Packet Received
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 3 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Non-MAGI Turning 65 Packet Received

18. Remove the following Task Types from the CalSAWS System. These Task Types are not tied to any automated CalSAWS System functionality. These Task Types are also not available for manual Task creation. If the listed Task Type is not associated to any Task records, remove it completely. If the Task Type is associated to at least one Task record, update the Task Type to be treated as a Los Angeles county custom Task Type:
   - General E-communications
   - GROW E-communications
   - GAIN E-communications
   - WTW 24-Month Time Clock Extender to end in one month
   - Contact Participant - CW SAR Reminder
   - Unexpected Fingerprint Match
   - Supportive Services Report GN6008 due
   - Progress Report Due
   - A child is 18 years old but has not graduated from High school
   - A child has graduated from High school and/or turns 18 years old
   - A child graduated from High school or turned 19 years old, Please review
   - Episode End
   - FC Case Created
   - Images Received
   - New Assignment-Program
   - Infant Supplement
   - Exception Task
   - Document/Verification Received
   - Redetermination Received
   - Provider not Licensed

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

19. Rename the "YBN e-Communications" Task Category to be "Self Service Portal Communications". This adjustment is strictly cosmetic and does not impact underlying functionality.

20. Add the following Task Categories to the CalSAWS System. These Task Categories will be available for use by all CalSAWS Counties.

   a. "VITA"
      (**Technical:** The code value for this Task Category must be "VT")

   b. "External Agency Admin"
      (**Technical:** The code value for this Task Category must be "EA")

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

   For additional details of the above pages, reference and design documentation in the following enhancements:
   - CA-214928: DDID 34
   - CA-221629: DDID 34 Continued
   - CA-214929: DDID 655

3   SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

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

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227118 | CIV-108857

SB 80 - Changes to Resource Asset Limits

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/03/2021	1.0	Initial Draft	T. Lazio

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1 OVERVIEW

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

1.1 Current Design

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

- For CW/RCA Assistance Units (AUs) that do not contain a member who is 60 years of age or older or disabled, the property limit increased to $10,000 (CT 335-84 CalWORKs Property Limit).

- For CW/RCA AUs that do contain a member who is age 60 years of age or older or disabled, the property limit increased to $15,000 (CT 335-03 CW Elderly and Disabled Property Limit).

1.2 Requests

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

   a. When a CW/RCA AU does not include a member who is 60 years of age or older or disabled, the maximum asset limit will be increased from $10,000 to $10,211.

   b. When a CW/RCA AU includes a member, who is 60 years of age or older or disabled, the maximum asset limit will be increased from $15,000 to $15,317.

1.3 Overview of Recommendations

1. Update CW/RCA EDBC rules that apply the resource test for CW Property Limit and Elderly and Disabled Property Limit to perform the calculations based on the new limits.

2. Regression test impacted NOAs and Forms that populate the CalWORKs Property Limits Disregard. Update the SAWS 2A SAR to auto-populate the CalWORKs Property Limits Disregard when generated in a RE packet.

3. Create C-IV and CalSAWS lists for CW/RCA Cases Denied/Discontinued due to 'Over Resources' for June and July 2021.

1.4 Assumptions

1. The Federal AFDC eligibility determination for Foster Care (FC) is made based on current property CW property limit. SCR CA-213138_CIV-106687 has been drafted to update the EDBC logic to determine federal AFCD determination based on Foster Care property limit.

2 RECOMMENDATIONS

2.1 CW/RCA EDBC: Property Limit and Elderly and Disabled Property Limit

2.1.1 Overview

Update CW/RCA EDBC rules that apply the resource test for CW Property Limit and Elderly and Disabled Property Limit to perform the calculations based on the new limits effective July 1, 2021.

2.1.2 Description of Changes

1. Effective July 1, 2021 the property limit will increase from $10,000 to $10,211 for CW/RCA AUs that do not contain a member who is 60 years of age or older or disabled (CT 335-84 CalWORKs Property Limit) and from $15,000 to $15,317 for CW/RCA AUs that do contain a member who is age 60 years of age or older or disabled (CT 335-03 CW Elderly and Disabled Property Limit).

2.1.3 Programs Impacted

CW

RCA

2.2 Regression Test Impacted CalWORKs NOA Variable Population

2.2.1 Overview

CW NOAs populate with the property limits for the program in both CalSAWS and C-IV.

2.2.2 Description of Changes

The following NOA Fragments in CalSAWS and C-IV populate the property limits for CalWORKs. These Fragments need to be regression tested to confirm that they populate with the newest values.

CalSAWS NOA Fragments:

ID	Fragment Name	Fragment Text	Languages
6132	CW_DN_PROP_CNT _EXCD_A104	You can not get cash aid if your total countable property is more than <PROP_LIMIT>. If the County figured your car or other vehicle was worth more than you think it's worth, you can give the County proof that it is worth less. Ask the County how. If you can prove it is worth less you may get cash aid.	EN, SP
6200	CW_TN_RES_AMT_L MT_A104	You can not get cash aid if your total countable property is more than <PROP_LIMIT>. If the County figured your car or other vehicle was worth more than you think it's worth, you can give the County proof that it is worth less. Ask the County how. If you can prove it is worth less you may get cash aid.	EN, SP
7333	CW_CH_ARCO_MI D_PERIOD_PROPERT Y_CHANGE_A996	You recently told the County about a change in property. Normally, the amount of property you reported would make you ineligible for cash aid. The rules say that the County only looks at your property once a year. This means that we will not change your cash aid at this time. Your next report is at your annual redetermination. All information must be reported and verified on your redetermination form. The property limit is <LIMIT> or <LIMIT2> if some on the grant is 60 or disabled. To stay eligible for cash aid, you must sell the property for a fair price, and then spend the money to below the property limit or put	EN, SP

| | | it into a restricted bank account. You cannot give it away or get a price lower than what is fair.

A restricted bank account protects savings for education, housing, or to start a business. You must call your worker and get the CalWORKs paperwork filled out and approved and then open a special (separate) bank account for these savings. | |

C-IV NOA Fragments:

Note: Fragment IDs 168 and 239 also are used for RCA.

ID	Fragment Name	Fragment Text	Languages
168	MSG_PROP_OTHER _THAN_HOME_MOR E_THAN_PROP_LIMIT	You own property that is worth more than the <LIMIT> limit. You have property that is available to you and the value of this property counts against you. We must count the value of all the property you own other than your home.	EN, AE, AR, CA, CH, FA, HM, KO, LA, RU, SP, TG, VI
239	RSN_EXCEEDED_PR OPERTY_LIMIT	Your property is more than the <LIMIT> allowable limit. Here is how we figured your countable property: Property: Countable Value: \<PROP\> \<VALUE\> Total Value <TOTAL>	EN, AE, AR, CA, CH, FA, HM, KO, LA, RU, SP, TG, VI
432	RSN_NO_CHANGE_ PROPERTY	You recently told the County about a change in property. Normally, the amount of property you reported would make you ineligible for <PGM>. The rules say that the County only looks at your property <DURATION>. This means that we will not change your <PGM> at this time. The property limit is <LIMIT>, or <LIMIT_2> if someone on the grant is over 60 or disabled. To stay eligible for <PGM>, you must sell the property for a fair price, and then spend the money to below the property limit, or put	EN, AE, AR, CA, CH, FA, HM, KO, LA, RU, SP, TG, VI

| | | it into a restricted bank account. You cannot give it away or get a price lower than what is fair.

A restricted bank account protects savings for education, housing, or to start a business. You must call your worker and get the CalWORKs paperwork filled out and approved and then open a special (separate) bank account for these savings. | |
|---|---|---|---|

2.3 Add and Regression Test CalWORKs Form Variable Population

2.3.1 Overview

CalSAWS and C-IV Forms were updated to auto-populate the property limits for CalWORKs per SCR CA-209033/CIV-104383 in release 20.03. These Forms will be tested to ensure that they are populating the new values ongoing.

Currently the SAWS 2A SAR does not auto-populate when generated as part of the CW RE and CW/CF RE packets. This effort will add auto-population to the Form when generated for a RE packet for both CalSAWS and C-IV.

Impacted Forms:
- CW 2218
- SAWS 2A SAR
- CW 86 – LA (CalSAWS only)
- M44-316C SAR (C-IV only)

2.3.2 Description of Change

1. **Regression Test Form Variable Population**

Regression test the following Forms to verify that the correct property limit is populating for CalWORKs.

Form	Variable	Languages
CW 2218	Located on Page 5 (C-IV) and Page 6 (CalSAWS):	CalSAWS:

	"There is a $<LIMIT> limit on the value of the property (e.g. bank accounts, stocks, etc.) that the child can own and be eligible to receive CalWORKs benefits. That limit increases to $<LIMIT2> if the child has a disability. A child under age 18 can own a vehicle (for example a car, truck, van, motorcycle, etc.) to drive to work, school, job training or to look for work. This also applies during temporary periods of unemployment for the child who customarily drives to and from work. Any motor vehicle with an equity value of $<LIMIT_VD> or less will not count against the $<LIMIT>. For each motor vehicle with an equity value of more than $<LIMIT_VD>, the value that exceeds $<LIMIT_VD> counts against the child's property. If it was given to the child as a gift, a donation, or a family member transferred it to the child, we also do not count it. You will be asked to give the county proof from the Department of Motor Vehicles that it was a gift, donation or transfer from a family member."	AE, CA, CH, EN, KO, RU, SP, VI C-IV: EN, SP
SAWS 2A SAR	Located on Page 9: "There is a $<LIMIT> limit on the value of the property (e.g. bank accounts, stocks, etc.) that your family can own and be eligible to receive CalWORKs benefits. If someone in your family is at least 60 years of age or disabled the limit is $<LIMIT2>. Your residence and furniture are not part of the limit. You can own a vehicle (for example a car, truck, van, motorcycle, etc.) as long as what it's worth minus what you owe is less than $<LIMIT_VD>. If it was given to you as a gift, a donation, or a family member transferred it to you, we do not count it. You will be asked to give the County proof from the Department of Motor Vehicles that it was a gift, donation or transfer from a family member. The vehicle will not count if used by your family for certain special reasons. Ask your worker what those reasons are. Your worker can explain to you how to figure the value of any vehicle."	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI

CW 86 – LA (CalSAWS only)	Located on Page 3: "Money in your restricted account(s) DO NOT count against the property limit you can have and <u>keep getting</u> cash aid. (The property limit is \$<LIMIT> or \$<LIMIT2> if there is at least one person in the household who is age 60 or older.) But money in a restricted account DOES count against your property limit if you are <u>applying</u> for cash aid. So if your cash aid stops and you reapply for cash aid, your total countable personal property including any money in your restricted account(s), cannot be more than the property limit." Located on Page 5. "I have read the coversheet. I understand the rules and my responsibilities for starting and keeping a restricted account; the rules for a period of ineligibility; and the need to have resources close to my \$<LIMIT> property limit (\$<LIMIT2> if there is at least one household member who is age 60 or older) for emergencies or other expenses before I start a restricted account. I understand and agree that: " "If my cash aid stops for any reason, and if I reapply for cash aid, my total countable personal property, including any money in the restricted account(s), cannot be more than the \$<LIMIT> property limit (or \$<LIMIT2> if there is at least one household member who is age 60 or older)."	AE, CA, CH, EN, KO, RU, SP, TG, VI
M44-316C SAR (C-IV only)	Located on Page 1: "The property limit is <LIMIT>, or <LIMIT2> if someone on the grant is over 60 or disabled."	EN, SP

2. Add Variable Population for CW RE and CW/CF RE packets

Update the Form Variable Population logic for the SAWS 2A SAR to populate with the CT 335-84 CalWORKs Property Limit and CT 335-03 CW Elderly and Disabled Property Limit when generated as part of the CW RE and CW/CF RE packets in both CalSAWS and C-IV.

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.1.2	The LRS shall include an automated method for implementing mass updates triggered by policy changes or mass participant financial changes, including Social Security or Veterans benefits cost of living adjustments (COLAs).	The maximum property limit for CalWORKs AUs will be increased to $10,211 and $15,317 for Assistant Units (AU) that include at least one member who is aged 60 or older or disabled.

4   OUTREACH

4.1   Lists

List Name: CW/RCA Cases Denied/Discontinued due to 'Over Resources' for June and July 2021
List Criteria:
- CW/RCA case has an effective property record for the program person effective for June or July 2021 benefit month.
- An EDBC has already been processed for the CW/RCA case for June or July 2021 benefit months.
- CW/RCA program has been denied/discontinued for June or July 2021 due to 'Over Resources' status reason.
- One of the following:
    a. For CW/RCA AUs that do contain a member who is age 60 years of age or older or disabled, check to see if resource total is equal to or below $15,317.
    b. For CW/RCA Assistance Units (AUs) that do not contain a member who is 60 years of age or older or disabled, check to see if resource total is equal to or below $10,211.

Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name

- Office Name
- Worker

Additional Column(s): EDBC Benefit Month, Program Status
Frequency: One-time
The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CA-227118
C-IV	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CIV-108857

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227345

Add Hyperlink on EDBC List Page for Converted
General Managed EDBCs

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	S Meenavalli
	Reviewed By	Ritu Chinya, Jason F, Adelaide M

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/26/2021	1.0	Initial Version	S Meenavalli

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1 OVERVIEW

1.1. Current Design

In CalSAWS, GM General Assistance (Managed) Program is not being administered under the CalSAWS Application as Los Angeles County don't have the General Managed Program.

As part of the C-IV migration, SCR CA-201377 (Release 21.01) - DDCR 10002: GA/GR Solution for C-IV Counties, CalSAWS incorporated the changes related to the GM Program.

But, for the C-IV Converted GM Program EDBC's in CalSAWS, the EDBC source is Conversion and a hyperlink is unavailable for workers to open the EDBC Summary on the EDBC Results list page.

1.2. Requests

Allow the C-IV workers to view the Managed GR Program EDBC results in CalSAWS Application for the C-IV converted cases after migration.

The request is to modify the CalSAWS application to display the C-IV Converted General Managed EDBC's with hyperlink and when clicked to display the Summary Page on the EDBC Results page.

1.3. Overview of Recommendations

1. Update the EDBC List page to display a hyperlink to the Managed GR program when the Source is Conversion. When the hyperlink is clicked, the users will be navigated to the General Assistance (Managed) EDBC Summary Page.

1.4. Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. Converted records will be indicated when they are transferred to CalSAWS during the conversion process.
3. This SCR changes does not effect LA County GA Program.

2 RECOMMENDATIONS

2.1. Update EDBC Results List Page

2.1.1 Overview

CalSAWS application to display the hyperlink for the C-IV Converted GM General Assistance (Managed) Program on the EDBC Results Page.

2.1.2 Description of Changes

1. Update the EDBC List page to display a hyperlink to the Managed GR program when the Source is Conversion. When the hyperlink is clicked, the users will be navigated to the General Assistance (Managed) EDBC Summary Page.

For General Assistance (Managed):

Customer Information	EDBC List							

Display by:

Program:		Type Reason:	Run Status:	From: 03/2020	To: 05/2021		

Search Results Summary — Results 1 - 7 of 7

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
03/2020	03/2020	CalFresh	Read Only	Accepted - Saved	69.00	04/11/2020	Conversion
03/2020	03/2020	CalFresh	Regular	Accepted - Saved	125.00	03/12/2020	Conversion
03/2020	03/2020	General Assistance (Managed)	Regular	Accepted - Saved	250.00	03/24/2020	Conversion
03/2020	03/2020	Medi-Cal	Regular	Accepted - Saved	Details	03/03/2020	Conversion
04/2020	08/2020	CalFresh	Regular	Accepted - Saved	194.00	03/12/2020	Conversion
04/2020		General Assistance (Managed)	Regular	Accepted - Saved	387.00	03/24/2020	Conversion
09/2020		CalFresh	Regular	Accepted - Saved	Fail	08/03/2020	Conversion

Left navigation: Case Number, Go, Person Search, Non Financial, Financial, Verifications, MC 355, EBT Account List, MAGI Verifications, MAGI Eligibility, Run EDBC, Manual EDBC, Needs, Service Arrangements, ABAWD Status, EDBC Results

2.1.2.a) EDBC Results List Page of C-IV Converted Case with General Assistance (Managed) Program EDBC's with EDBC Source Conversion – Before Change

2.1.2.b) EDBC Results List Page of C-IV Converted Case with General Assistance (Managed) Program EDBC's with EDBC Source Conversion – After Change

2.1.2.c) EDBC Summary Page of C-IV Converted Case with General Assistance (Managed) Program – After Change

2.1.3 Programs Impacted

GM – General Assistance (Managed)

2.1.4 Performance Impacts

None

3 REQUIREMENTS

3.1. Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.8.1.17	The LRS shall, as part of the conversion transaction corrective action plan above, include the option to treat the case as a manual case under the ED/BC requirements for overriding the system.	CalSAWS will make the EDBC hyperlink available for C-IV Converted General Assistance (Managed) Program.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227895 DDID 2192 - Changes to Store
Operations for E-Apps

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1 OVERVIEW

This SCR will update CalSAWS to link an e-Application document and any other scanned images that were attached to the e-Application in CalSAWS Imaging Solution (Hyland) to a Person Id.

1.1 Current Design

Currently the CalSAWS System makes a call to the CalSAWS Imaging Client API to re-index the e-Application image to the appropriate drawer for Counties that are linked to Hyland and links the application and images to a system case.

Furthermore, there is no imaging logic to automatically reindex case scope documents to person scope.

1.2 Requests

1. Update the CalSAWS System to have the ability to link in Hyland an e-Application image and any other scanned images that were attached to the e-Application to the appropriate Person Id.
2. Add logic to the imaging system to support leveraging the Bundle ID field for Portal submitted to reindex documents to person scope.

1.3 Overview of Recommendation

1. Update the reindex service linked to the 'Save and Continue' button on the 'Case Member List' page to trigger linking the e-Application to a Person ID.
2. Update the E-APP Re-index Request in the CalSAWS Imaging Client API to link an e-Application image to the Person Id.
3. Update the existing batch job (retrigger job for failed transactions) to link an e-Application image and any other scanned images to the Person Id.
4. Update the "Person Handling" queue logic to perform a lookup and reindex of documents.

1.4 Assumptions

1. PseudoId column created in C4Y_PERS by CA-224251.
2. Existing reindexing functionality done by CA-214051 will remain unchanged.
3. Documents submitted must contain a "Capture Information" value of "Portal" and the "Bundle ID" field must contain a valid "Person ID" in order to be reindexed to person level.

2   RECOMMENDATIONS

2.1   Update Case Member List Page

2.1.1   Overview

The Case Member List page is part of the e-Application linkage process in the CalSAWS system. The worker will need to go through this page to confirm that the e-Application should be linked to a case. This SCR will update the logic to link to the corresponding Person Id associated with the case.

2.1.2   Case Member List Mockup

N/A

2.1.3   Description of Changes

1. Update reindexing logic for the 'Save and Continue' button on the 'Case Member List' page to trigger linking the e-Application to a Person ID.
2. The updated logic should include the Person ID when calling the CalSAWS Imaging Client API's E-app Re-index request. Check the Appendix section for the new E-app Re-index request field.
3. The pseudoId will be sent as the bundleId as part of the application transfer service created for CA-224251. The Person Id will be sent as the bundleId as part of the reindex service.

Note:

- These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). The Existing Point of Service page will remain for LA County until they go live on the Hyland Solution.
- Insert the status of 'ER-Error' in the database for the associated case linkage record if the CalSAWS Imaging Client API return's a call of unsuccessful during the reindexing process. This existing error implementation from CA-214051 should remain unchanged.
- Upon clicking the 'Save and Continue' button, check the Code Detail Table (Category ID 15) from the database to determine if a call will be made to either EDMS webservice or the CalSAWS Imaging Client API. This existing logic from CA-214051 should remain unchanged.
- The corresponding Person Id will be saved to the C4Y_PERS record containing the pseudoID of the application member.

2.1.4 Page Location

Global: Case Info

Local: e-Tools

Task: e-Application Search

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Update E-App Reindexing Batch Job

2.2.1 Overview

Currently this batch job, re-indexes e-Application documents and images when the real-time re-index fails. This SCR will update this job to include linking the e-Application to a Person ID in the system.

2.2.2 Description of Changes

Update the existing nightly batch job to link the e-Application to a Person ID in the system. The CalSAWS Imaging Client API's E-APP Re-index request will be sent with the Person ID as the bundleId as shown in Appendix Table 1.

Note:

- These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). The Existing Point of Service page will remain for LA County until they go live on the Hyland Solution.
- When the reindexing is unsuccessful, store the status 'ER-Error' in the database for the associated case linkage record. This existing error implementation from CA-214051 should remain unchanged.

2.2.3 Execution Frequency

No change.

2.2.4 Key Scheduling Dependencies

N/A.

2.2.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.2.6 Data Volume/Performance

N/A.

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Update Imaging "Person Handling" Queue

2.3.1 Overview

The Person Handling queue will have its processing script updated to include logic to inspect the "Capture Information" and "Bundle ID" fields.

2.3.2 Description of Change

The following rules will be applied to all documents processed by the "Person Handling" queue that have been identified as person scope documents:

- Inspect the document metadata for the value of "Portal" in the "Capture information" field
- Inspect the document metadata for a not NULL value in the "Bundle ID" field
- When both conditions are TRUE, perform "GetPersonInfo" lookup off of the current case metadate
- Using the results from the "GetPersonInfo" lookup, update the document metadata with the object data response that has a matching "personUID" to the value in the "Bundle ID" field
- Update the document Drawer to "Person"
- Route the document to the "Update Before Archival" workflow queue

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4 APPENDIX

E-APP Re-index - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentId	id	String	Document Id	Y
uniqueId	Indexing Field 1	Long	Case Id	Y
caseNumber	Indexing Field 2	String	Case Number	Y
caseName	Indexing Field 3	String	Case name	Y
bundleId	bundleId	String	Person Id. For case level document, bundleId will not be sent.	N
drawerName	Drawer	String	Imaging Drawer name	Y

Table 1: Re-index Request Parameters

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228383

Update Run EDBC Validation Message for Conversion months

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	S Meenavalli
	Reviewed By	Ritu Chinya, Jason F, Binh T

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/12/2021	1.0	Initial Version	S Meenavalli

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1 OVERVIEW

1.1. Current Design

Currently in CalSAWS, there is an existing Run EDBC hard validation message that is displayed when workers try to run Retro EDBC's for the months prior to the conversion month. This is not specifying the exact details and a bit confusing.

As part of the C-IV migration, the existing Run EDBC hard validation message is required to be modified to give more specific details.

1.2. Requests

The request is to modify the existing Run EDBC hard validation in CalSAWS application to display the message correctly when workers trying to run EDBC's prior to the conversion month.

1.3. Overview of Recommendations

Update the Run EDBC message that is displayed when workers trying to run EDBC's prior to the Conversion month.

1.4. Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. Converted records will be indicated when they are transferred to CalSAWS during the conversion process.
3. This SCR changes does not effect LA County Programs.

2 RECOMMENDATIONS

2.1. Update Run EDBC validation message

2.1.1 Overview

CalSAWS application to display the correct Run EDBC Validation when workers trying to run EDBC's prior to the conversion month on the "Run EDBC" Page.

2.1.2 Description of Changes

1. Update the existing Run EDBC hard validation and use it for all Programs:
   Before: <Program(s)>: EDBC cannot be run for this program prior to the conversion month 09/2021.

After: <Program(s)>: EDBC cannot be run for this program(s) prior to 10/2021. Please use Manual EDBC for months prior to 10/2021.

Technical Note:
1. For Retro EDBC Programs CW, CF, MC, NB and KG the month will be displayed as 06/2021.
2. For non-retro EDBC Programs FC, AAP, CAPI, GA, GM, RCA, HT, HP the month will be displayed as 10/2021.
3. The conversion month will be driven by the column PGM.CONV_DATE which will be populated by conversion.

Run EDBC Page:

Customer Information	**Run EDBC**					
	✱- Indicates required fields				Change Reason	Cancel
Case Number: [ ] Go	**Benefit Processing Range:**					
Person Search	**Begin Month:** ✱		**End Month:** ✱			
▶ Non Financial	02/2021 ▾		06/2021 ▾			
▶ Financial	☐ **Program**	**Status**	**Timely Notice Exception**		**Reason**	**Run Reason**
Verifications						
MC 355	CalFresh, CalWORKs: EDBC cannot be run for this program prior to the conversion month 09/2021.					
EBT Account List						
MAGI Verifications						
MAGI Eligibility					Change Reason	Cancel
Run EDBC						
Manual EDBC	This Type 1 page took 0.87 seconds to load.					
Needs						
Service Arrangements						
ABAWD Status						
EDBC Results						

2.1.2.a) Run EDBC Validation for all programs – Before Change

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2.1.2.b) Run EDBC Validation for Retro EDBC Programs – After Change

2.1.2.c) Run EDBC Validation for non-Retro EDBC Programs – After Change

2.1.3 Programs Impacted

All EDBC Programs

2.1.4 Performance Impacts

None

3 REQUIREMENTS

3.1. Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.8.1.17	The LRS shall, as part of the conversion transaction corrective action plan above, include the option to treat the case as a manual case under the ED/BC requirements for overriding the system.	CalSAWS will make the EDBC hyperlink available for C-IV Converted General Assistance (Managed) Program.